Add Related Documents

The Related Documents function allows the user to attach electronic files to the record they are working on; such as a document, spreadsheet, or image from the document repository. Related documents can also point to a URL (web) shortcut.

| 1. From the Modul | e screen, | Select Relat | ed Documents. | Notes Log User Defined Fields Status History Related Documents AiM Related Document | nts | | | |
|---------------------------------|-----------------|---------------------|------------------------------|---|--------|------|---------|-----|
| 2. Click: | | | | | | | | |
| Save Cancel | | _ | _ | _ | | | • | C) |
| W0001247 | | | Created By Last Edited by | ZINDY GARY On 6/9/22 10:12 AM ZINDY GARY On 6/9/22 10:22 AM | | | | |
| MATH CUSTODIAL SUPPLY AND LABOR | | | | | | | | |
| Document Listing | | | | | Attach | Link | Remove | Add |
| Thumbnail Title | Current Version | Document Type | Extra Description | | | | Related | On |
| | | | | | | | | |

- 3. To Attach an Existing Document. Click:
 - a. Search for the document by entering one or more of the following: GUID, Title, Created By, Date Created, Type, State, Checked Out By, Extra Description, Edit Date and/or Editor.

| Ex | Advanced Search | Reset Cancel |
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| * | Action | Display Order Sort Operator |
| Q | <u>New Query</u> | GUID - V = V |
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| | | Edit Date - • • = • = Editor - • = • |
| | b. Once dat | a has been entered, click: Execute |

Done c. Check the box next to the document to select, click: d. Click on a Thumbnail to view the document. This will open another tab in your browser. When done close the browser tab. e. On the main module screen, click: AiM Related Documents 0 • Created By CINDY GARY On 6/9/22 10:12 AM W0001247 Last Edited by CINDY GARY On 6/9/22 10:22 AM MATH CUSTODIAL SUPPLY AND LABOR Document Listing Attach Link Rem Thumbnail Title Add 4. To Add <u>NEW</u> Document. Click: **AiM** New Document Cancel Next Please select document(s) to load: Upload File(s) Choose Files No file chosen Add Meta Data Add Attributes Add Permissions Choose Files a. Click: Locate the new document on your computer. Next b. Click:

AiM New Document

| Next | Cancel | | | | | |
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| <u>Upload File(s)</u> | | Title | Fail Records_export_1649786407475.xlsx | |] | |
| Add Meta Data | | Туре | م | | <u></u> | |
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| Add Permissions | | | | | | |
| | | File Name(s) | Fail Records_export_1649786407475.xlsx | | | |
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| C. | Enter the Title (| of document | t. | | | |
| d. | Click: Q select a Type from a list. | | | | | |
| e. | OPTIONAL: Tags (assists in search) and Permissions | | | | | |
| f. | Click: Next two (2) times. | | | | | |
| g. | Click on a Thur | ıbnail to vie | w the document in a separate browser ta | ab. | | |
| h. | Click: Save | I | | | | |
| AiM Related Do | ocuments | | | | • | • |
| Save | Cancel | - | Created By CINDY GARY On 6/9/22 10:12 AM | | | |
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| Document List | ing | rrent Version <u>Document</u> | Type Extra Description | Attach Link | Remove | Add |
| 3. To Add | I EXTERNAL URL | Click: | c | | | |

AiM Web Link

| Done | Cancel | |
|-------------------|--------|--|
| Title | | |
| Extra Description | | |
| URL | | |

- a. Enter a Title.
- b. OPTIONAL: Extra Description for additional information.
- c. Enter a **URL** and click:
- d. Click on a **Thumbnail** to view the document or link to an external web page.

