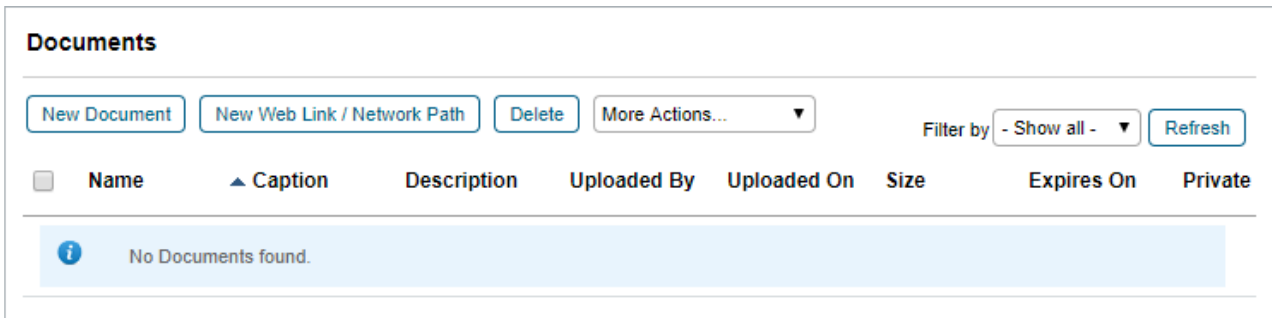


Documents

The **Documents** tab allows you to attach entity-related documents, such as service contracts. You can attach documents from your local system or document repository, or provide a web link or network link to external information as a reference. The **Documents** tab can be found in the details page of an object, such as an entity, entity collection, program, or control. Note that shared documents cannot be added to all objects.

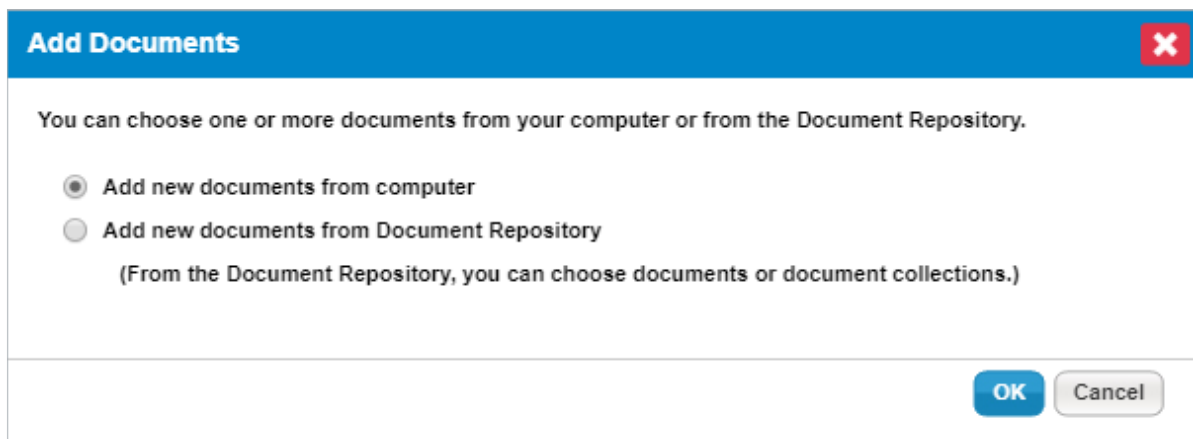


The Documents window.

Other resources allow the attachment of documents in order to document findings, tickets, exception requests, and for other needs. For example, the **Findings** option supports attaching documents in the context of a questionnaire.

To attach a document:

1. Select an object to open its details page, then click the **Documents** tab.
2. Click **New Document**. Select one of the following options:



The Add Documents window.

- **Add new document from Computer:**
 - Click **OK**.
 - Fill out all fields, including **Document Caption**, **Description**, and **Expires On**.


Add Document(s) ✕

i To add one or more new document(s), select one or more files on your computer by clicking on the Browse button.

Document Location* No file chosen

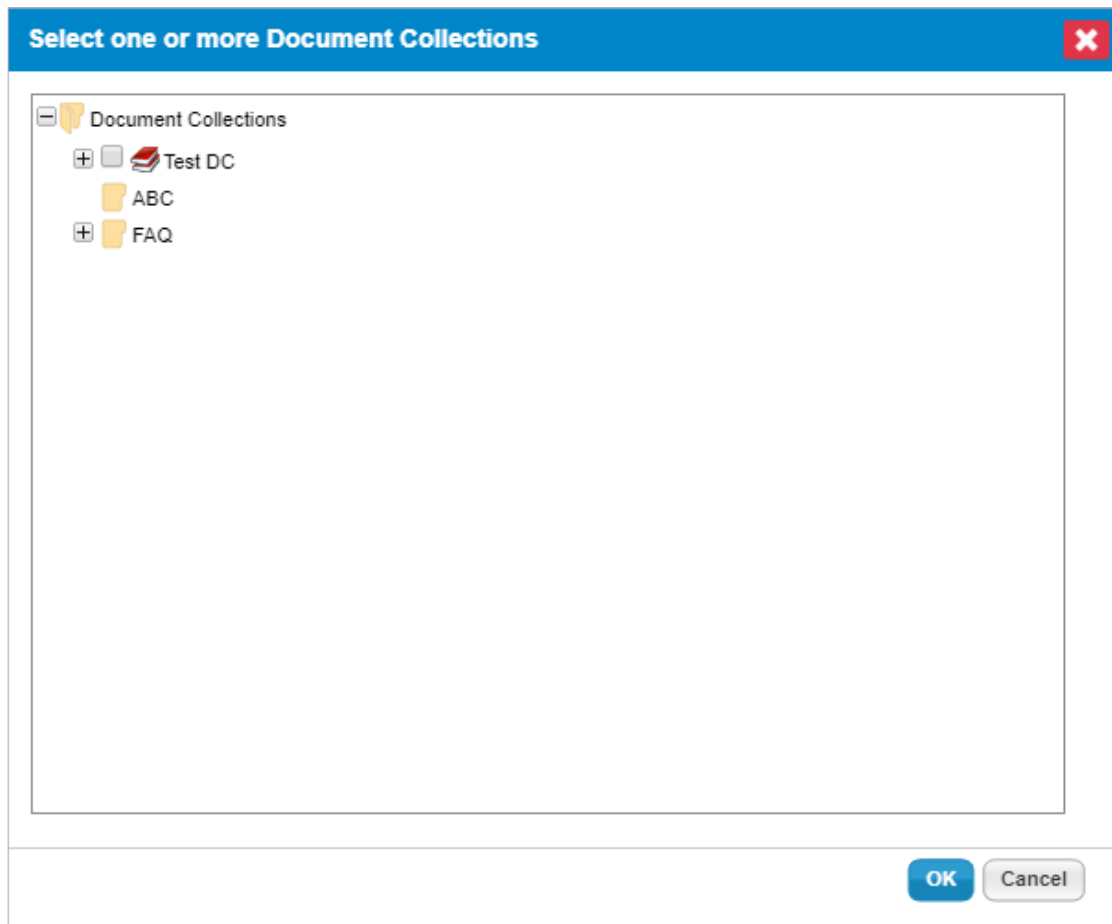
Document Caption

Description

Expires On 

The Add new documents from computer window.

- Click **OK**.
- **Add new document from Document Repository.**
 - Click **OK**.
 - Select the required document collection.



The Add new documents from Document Repository window.

- Click **OK**.

To attach a web link or network path:

1. Select an object, then click the **Documents** tab.
2. Click **New Web Link/Network Path**.

Add Web Link / Network Path


New Web Link/Network Path
To add a new web link or network path, choose type, enter a caption and type in the URL to your document.

Choose Link Type Web Link Network Path

URL*

Link Caption

Description

Expires On 

OK **Cancel**

The Add Web Link/Network Path window.

3. Click the **URL** field and type the complete URL or Network Path.
4. **Optional:** Enter a **Link Caption** and **Description**, and click the calendar icon to set the **Expires On** field.
5. Click **OK**.

To delete a document, web link or network path:

1. Select an object, then click the **Documents** tab, or go to the user interface area where documents are located.
2. Check the box next to document(s) and web link(s) you want to delete.
3. Click **Delete**.
4. Click **OK**.

The UNC path will display in all browsers but is only be clickable in Internet Explorer because other browsers block direct connection to the UNC path for security reasons. If you're using another browser you will need to manually navigate to the appropriate location on the external file system.