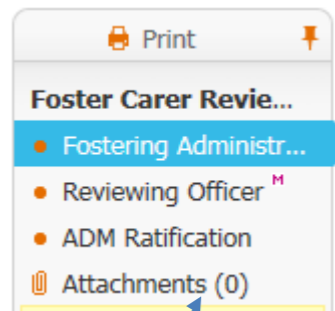


How to attach documents to a form

Step 1



Click on Attachments

Step 2

Attachments (0)

There are no attached documents
▶ Add Attachment

Click Add Attachment

Step 3

The 'New Attachment' form is shown. It has a title bar with 'Previous', 'Next', and 'Finish' buttons. The form contains the following sections:

- Document Type:** Category (Form Attachment), Type (Form Attachment), and a checkbox for 'Link to the form's subject'.
- Date:** A date picker set to '09-Jul-2019'.
- Notes:** A text area containing 'Document Details go in here'.
- Notification:** A section with 'Notification: None Selected' and a checkbox for 'Change notifications for involved users'.

Add Category, Type and Document Details into notes then click Next

Step 4

The 'New Attachment' form is shown. The 'Attach File' section is highlighted. It includes a text input for 'Attachment:' and a 'Browse...' button. Below it, there is a note: 'The maximum number of files you can select in one go is 3. The file upload limit is 4.9 Mb.' The 'Details' section is also visible, showing 'Document Type: Form Attachment', 'Date: 09-Jul-2019', and 'Notes: Document Details go here'.

Browse computer for document then click Finish

Step 5

The 'Attachments (1)' table is shown. It has a title bar with 'Information', 'Form', 'Consolidation', 'Delegate', and 'Revisions' buttons. The table contains one row of data:

Date	Category	Type	Status	Editor	Notes	Download
09-Jul-2019	Form Attachment	Form Attachment	Completed	Tanya Sandhu - LCS	Document details go here	Testing document.docx

Form attachment will display as part of the form