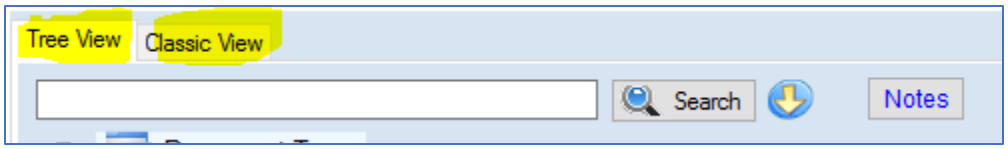
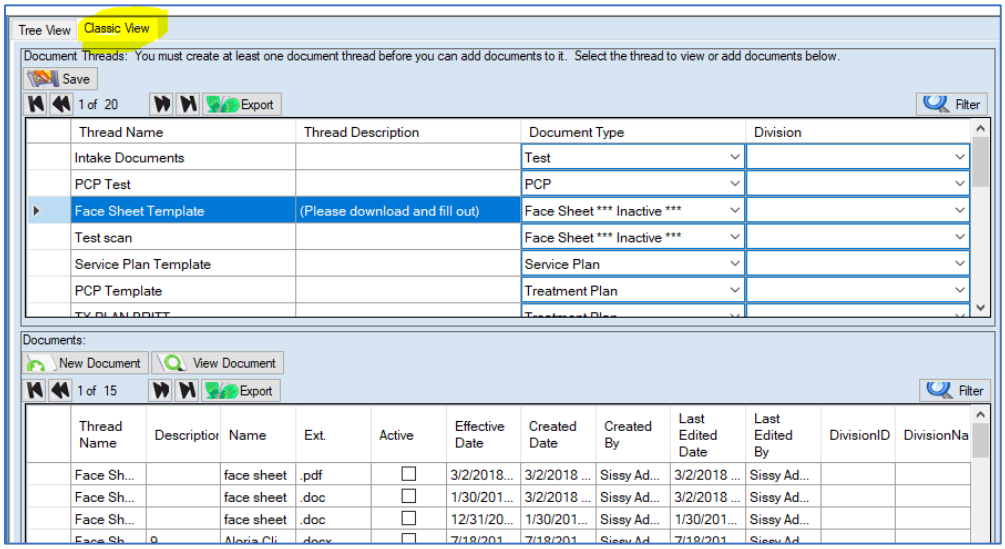
Document Management

Summary:

The document window in PIMSY performs much like MS Windows file management. However, you can still use the "**Classic View**" for adding and managing documents. Click on either **Tree View** or **Classic View**.



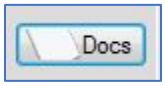


*See below for **Classic View** instructions.*

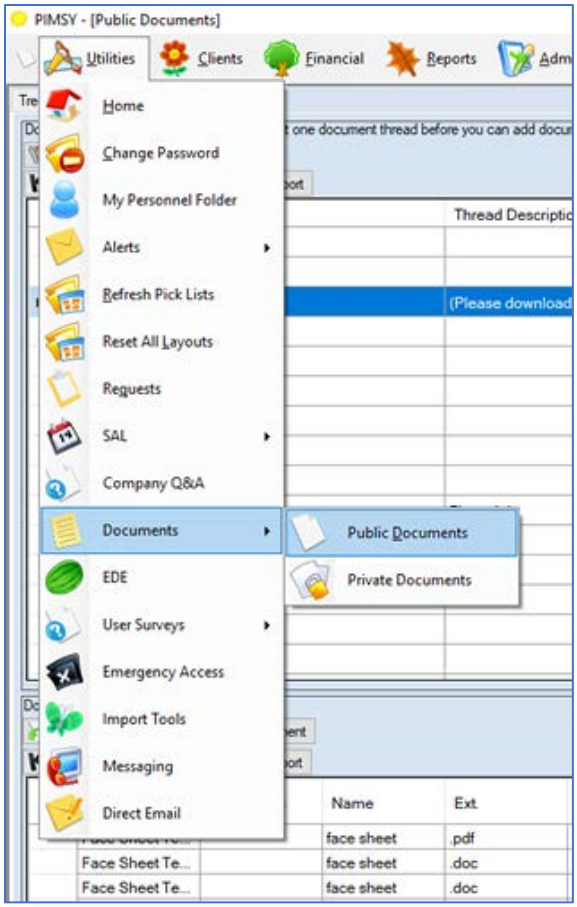
In the **Tree** or **Classic** views, folders can be created and files added to manage all documents pertaining to a specific section of PIMSY.

When a document is added to a **Client Group**, it will be displayed in each client's document tree.

Access the new Document window wherever documents are managed and stored in PIMSY. One example is the **Documents** tab on the **Client Details** page. In other areas, click on the **Docs** button.



You can also access **Public** and **Private** documents under the **Utilities** menu.



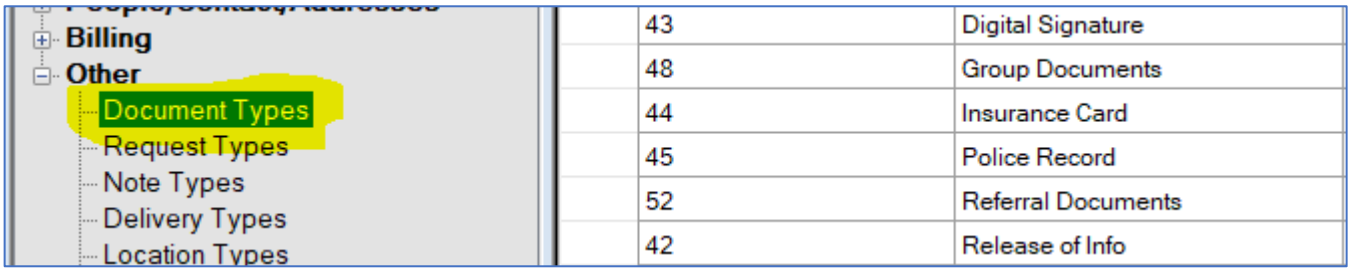
Instructions:

Go to any area in PIMSY where documents are uploaded and managed.

To ***create the first folder***, right click on **Document Type**. *The Document Types must first be created in Pick Lists*.

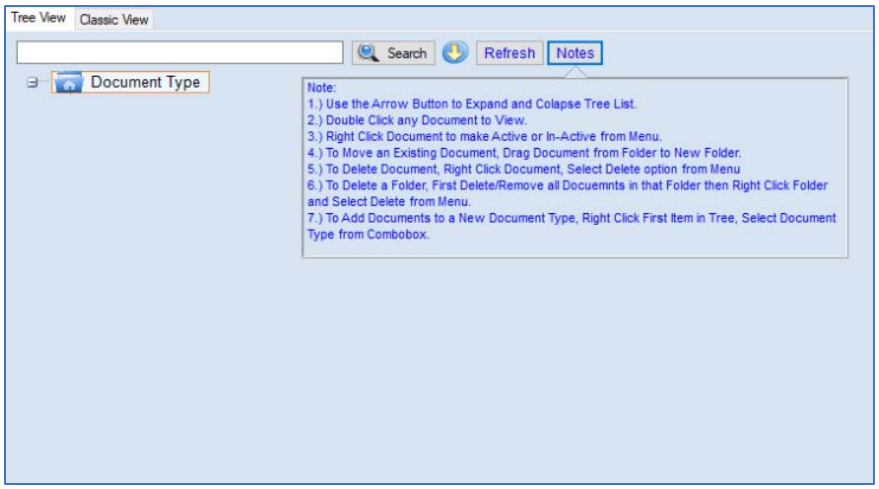
DOCUMENT TYPE PICK LIST MANAGEMENT

To add or remove a **Document Type**, go to **Pick List Management** and select the **Document Types** tab (under Other). To remove a document type, select an existing line and click **Delete**. To add a new **Document Type**, select the bottom empty white row and add the Name, Description (optional) and select the appropriate additional functions, such as **Add to New Clients**. When you check **Add to New Clients**, the document type will be automatically added to a new client's chart. If appropriate, be sure the Document Type is **Active**.



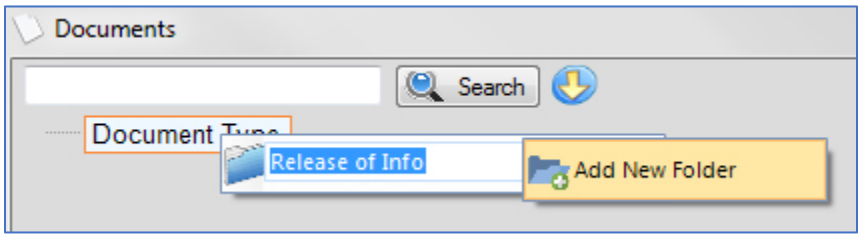
TREE VIEW

The first time the **Document** window appears, there won't be any folders or files.

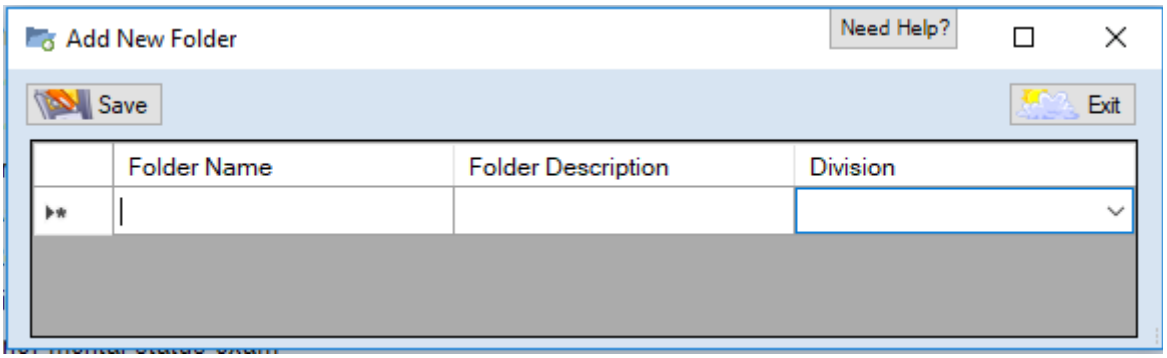


If needed, click on the **Notes** tab at the top for quick instructions.

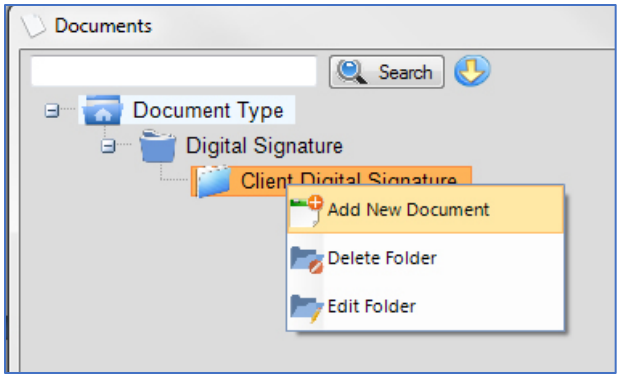
When you right-click over **Document Type**, a window pops up where you can select the **Document Type** and **Add a New Folder.**



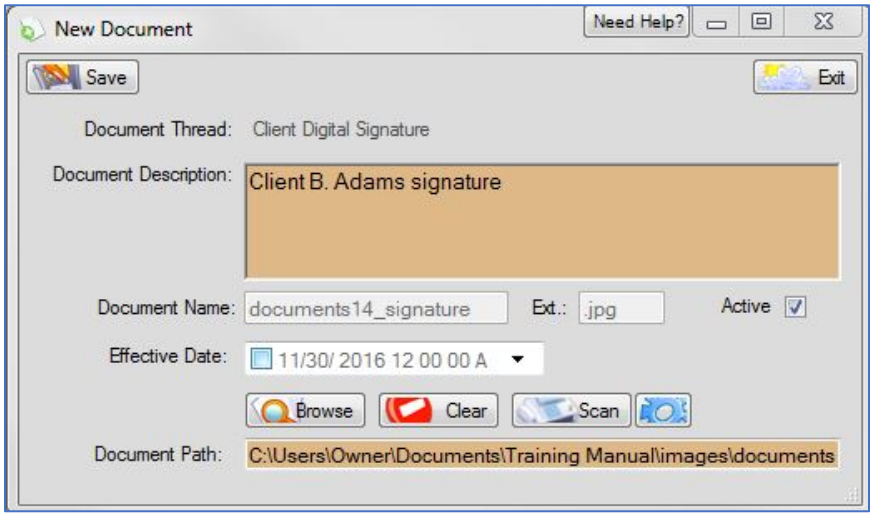
When you click on **Add New Folder**, a new window appears where you add the folder name, optional description and Division. This folder will appear under **Document Type**

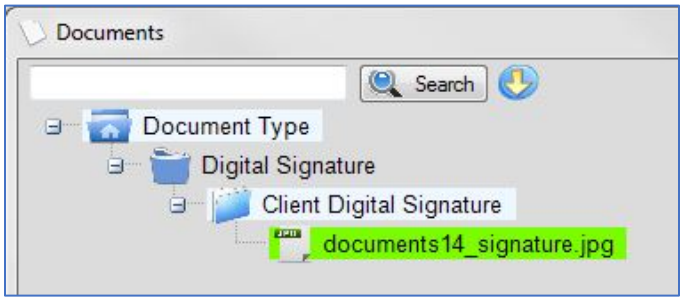


To ***add a document***, right click on any folder and select **Add New Document**.



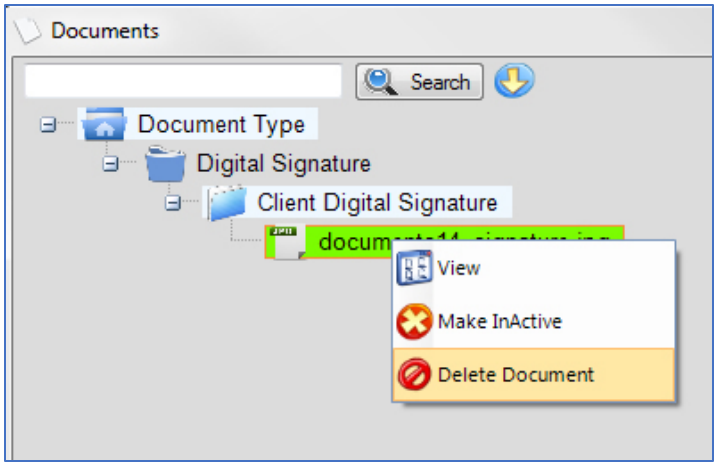
The New Document window opens for you to add a **Document Description** and **Browse** for the file. Make **Active** if appropriate. **Save**. The new document will appear under the designated folder.



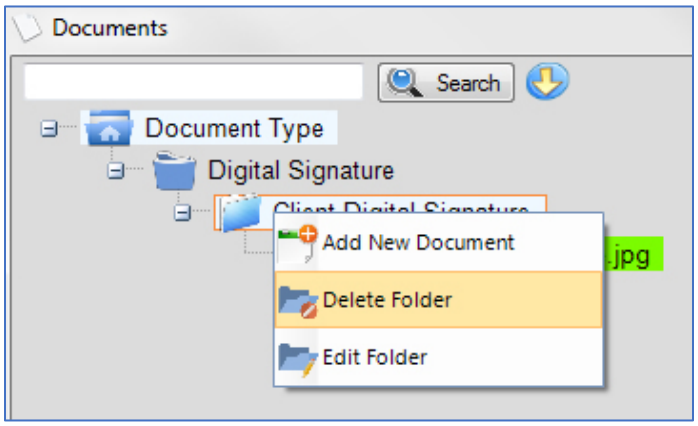


To add new main folders, go to the **Document Type** dropdown and select a different type or right click on an existing document type to add a new subfolder. Follow the instructions above for adding a folder and a file.

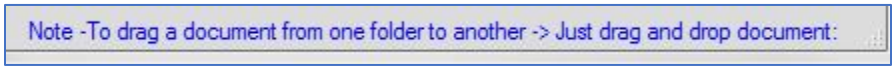
To ***delete a file***, right click over the filename and select **Delete Document**. You can also **View** the file and/or **Make InActive**.



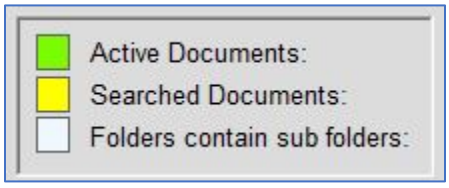
To ***delete a folder***, remove all files in that folder, then right click over the folder and select **Delete Folder**.



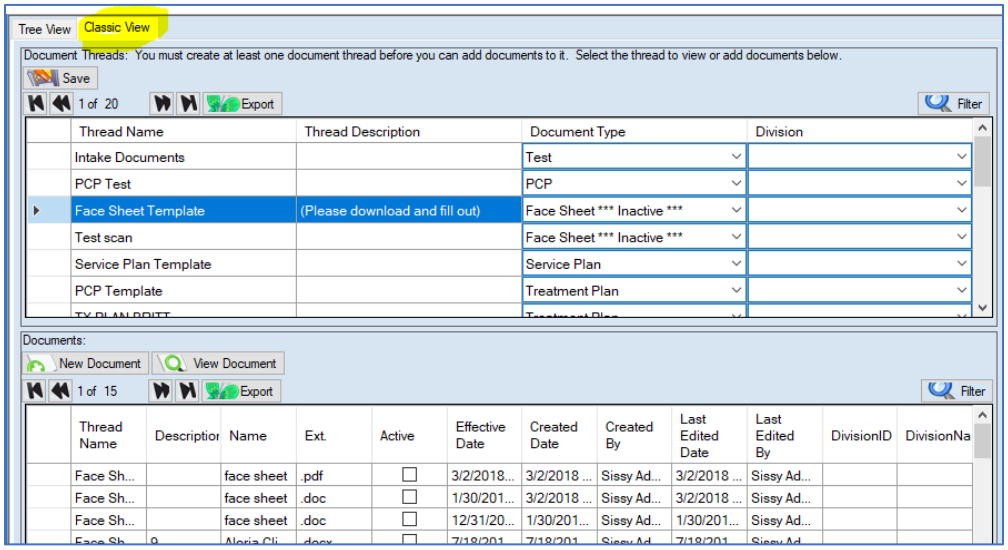
To ***move a document***, drag and drop it into a different folder.



The color legend indicates the current source/state of a document.



CLASSIC VIEW



Columns:

UPPER SECTION

Thread Name – a name for the document "folder."

Thread Description – optional description of document

Document Type – a "type" of document selected from a drop-down box

LOWER SECTION

Buttons:

New Document – add a new document

View Document – view an existing document

Columns:

Thread Name – name that was added in the top section

Description – optional description for document

Name – name of the file uploaded

Ext. – file extension for the document, such as .doc, .jpg, .xls, etc.

Active – document is active in PIMSY

Effective Date – date when the document should be Active in the system

Created Date – first date document was added

Created By – person who first added the document

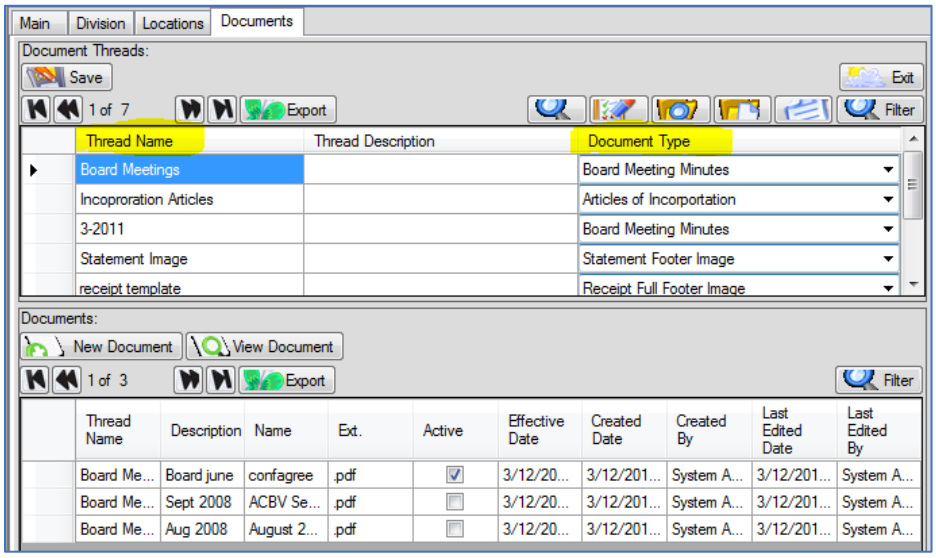
Last Edited Date – last date document was edited

Last Edited By – last person who edited the document

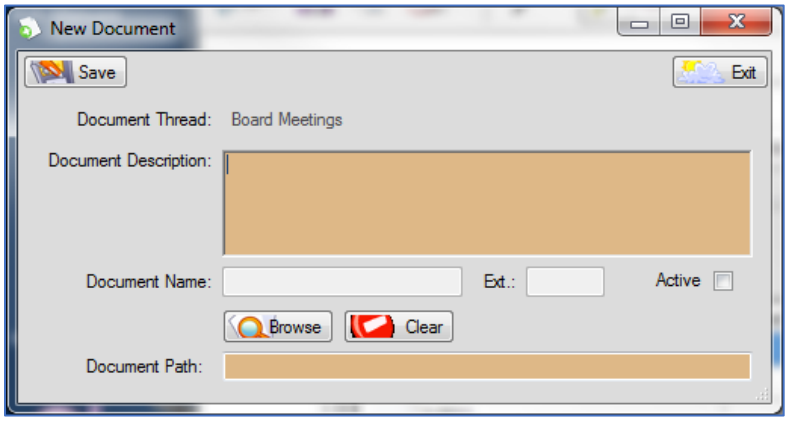
Instructions:

To upload a new document, start on the last line in the top section, the one with the *. Enter **Thread Name,** optional **Thread Description** and then select the D**ocument Type** from the drop-down menu. *(see Pick List instructions below for adding/removing document types)*

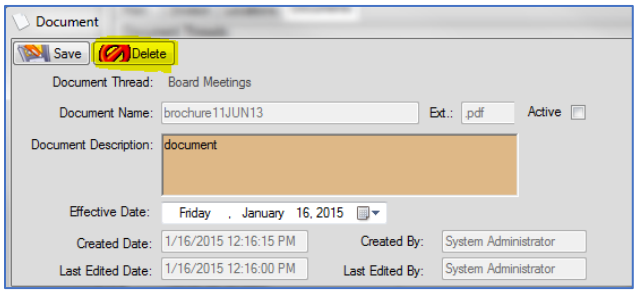
Select the new line and click on **New Document**.



A box will open where you can upload your document. Give the document a description and **Browse** for the file on your computer. The **Document Name** will fill in automatically with the filename you attach. Click **Save** and **Exit**.



To *remove a document*, double-click the row in the bottom section you want to remove and click **Delete** in the popup window. Click **Yes** and **Yes** to delete the file.



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