## **Utilize Document Manager**

## **Common Buttons & Icons**



Resources icon

Expand icon

## **Add A Document**

From the PromisePoint site:

- 1. Click the **Resources** icon.
- 2. Click the appropriate category folder.
- 3. Click the appropriate subcategory folder, if necessary.

Note: To add a new category, complete the following steps:

- a. Click Add Category.
- b. Enter the category title in the **Title** field.
- c. Click the **parent category** drop-down arrow.
- d. Click the category you want your new category to fall under.
- e. Click **Submit**.
- 4. Click Add File.
- 5. Enter the name of the document in the **Title** field.

Note: All document titles must be unique; they cannot be duplicated.

**Note:** If you are linking to a URL instead of a document, click the URL radio button.

- 6. Click **Browse**.
- 7. Navigate to where you saved the file on your computer.
- 8. Click the file.
- 9. Click Open.
- 10. Enter a description in the **Description** field, if needed.
- 11. Enter search terms in the **Metadata/Keywords** field.

Note: Use a comma to separate search terms.

- 12. Click the **Expand** icon to drill down to the appropriate category.
- 13. Select the appropriate category check box(es).

**Note:** Documents can be accessed from more than one category.

14. Click Submit.

**Search for a Document** From the PromisePoint site:

- 1. Click the **Resources** icon.
- 2. Enter your search term in the **Search all documents** field.
- 3. Click **Search**.

