

## DocumentReady - Setup View

### Adding a New Document from a File or URL

This reference guide provides a comprehensive overview for adding a new document within the DocumentReady module. The following process steps and instructional information are provided in this document:

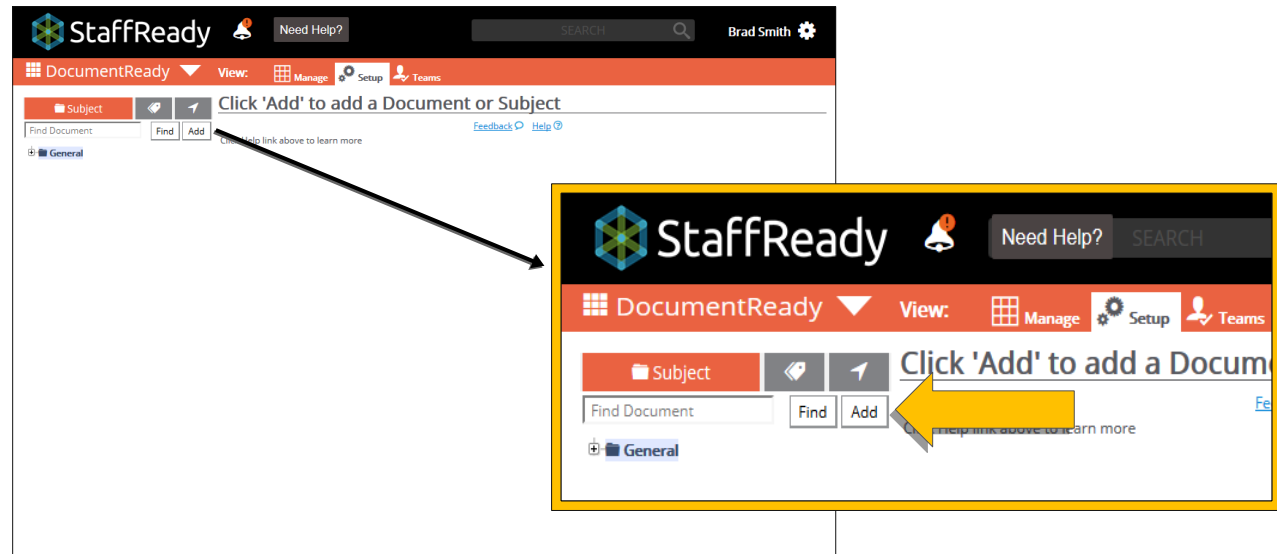
- **Adding from a File or URL**

## 1 | Adding from a File or URL

### Adding a New Document for Review from a File or URL

1. Click the **Add** button.

**\*Note:** You can add a new document from any perspective (i.e. Subject, Classification, or Location).



2. Type the desired name of the document in the **Document Name** field.

3. From the **Document Type** drop down menu, select **File or URL**.

4. To associate a specific location(s) with a document, type the desired location in the **Locations** field and then select it from the available options.

**\*Note:** Select the **Use Site Approvers** and/or **Location Review Teams** checkboxes, if applicable.

5. To add a **Classification**, click the **[not set]** link. This will open the **Select Classification** window.

The screenshot shows the 'Add Subject Or Document' form. The 'Document' tab is selected. The form contains the following fields and options:

- Document Name\***: A text input field containing 'Glucose Tolerance Procedure - 2HR'. A yellow arrow points to this field.
- Document Type\***: A dropdown menu with 'File or URL' selected. A yellow arrow points to this dropdown.
- Locations**: A list of two locations: 'x Lab (Site: Kendal Yards Clinic)' and 'x Lab (Site: Hawthorne Clinic)'. A yellow arrow points to this list.
- Site/Location Link**: Two checkboxes, 'Use Site Approvers' and 'Use Location Review Teams', both of which are checked. A yellow arrow points to this section.
- Classification\***: A link labeled '[not set]'. A yellow arrow points to this link. To its right, the text 'Subject' is followed by a link 'Chemistry'.
- Time Between Reviews\***: A dropdown menu with '1 Year Interval' selected.
- Description**: A large text area for entering a description.
- Save Changes**: A button at the bottom of the form.

6. Locate the desired Classification by either clicking the **+** or **-** (plus or minus) icons in the tree view to expand or collapse entries, or search for the Classification using the **Find** text field and button. When finished, click the appropriate **Select** button.

The screenshot shows a dialog box titled "Select Classification" with a close button (X) in the top right corner. Below the title bar, it displays "Current Selection: [none selected]". There is a search field labeled "Find Classification" and a "Find" button to its right, with a yellow arrow pointing to the button. Below the search field is a tree view of classification categories. The categories are: Documents, Client Services, Clinic, Core Lab, Chemistry, Competency, Memo, Policy, Procedure, Work Sheet, Hematology, Immunochemistry, and Microbiology. Each category has a plus or minus icon to its left and a "Select" button to its right. A yellow arrow points to the "Select" button for the "Procedure" category.

Classification Category	Select Button
Documents	
Client Services	
Clinic	
Core Lab	
Chemistry	Select
Competency	Select
Memo	Select
Policy	Select
Procedure	Select
Work Sheet	Select
Hematology	Select
Immunochemistry	Select
Microbiology	Select

**\*Note:** The **Subject** will default to the Subject that was selected when you initially clicked the Add button in step 1. To change, click the **Subject** link and follow the same process mentioned in step 6.

7. Select an option from the **Time Between Reviews** drop down menu.

8. Type a brief description of the document in the **Description** field.

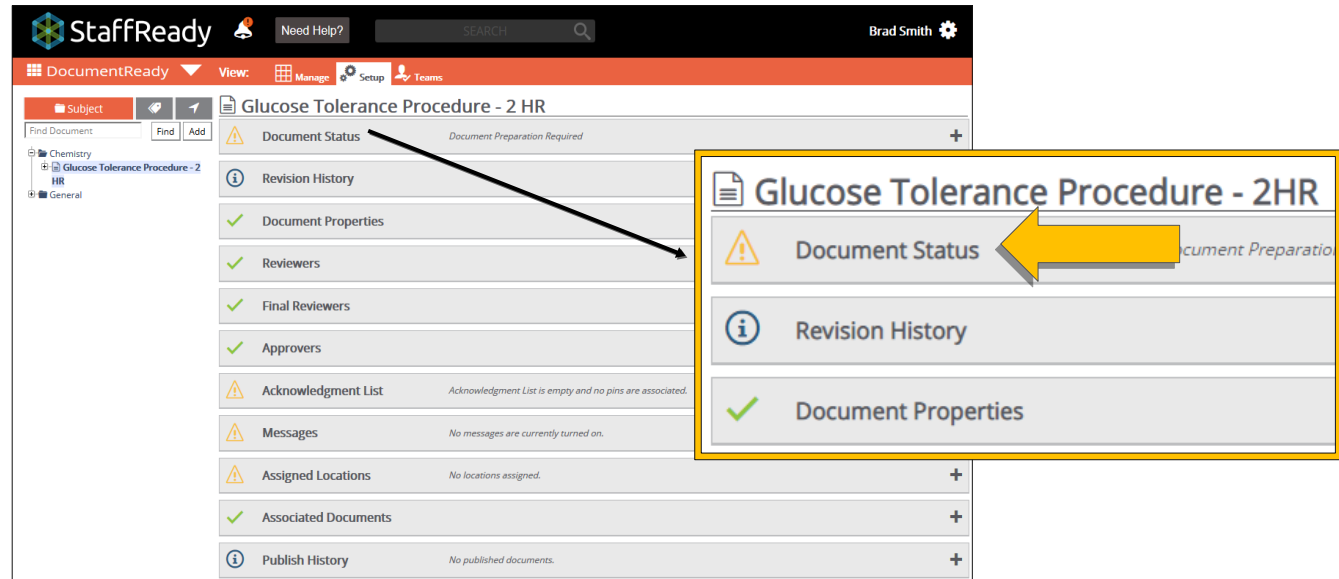
9. Click the **Save Changes** button.

The screenshot shows a web form titled "Add Subject Or Document" with a close button (X) in the top right corner. On the left, there are two tabs: "Document" (selected) and "Subject". The form fields are as follows:

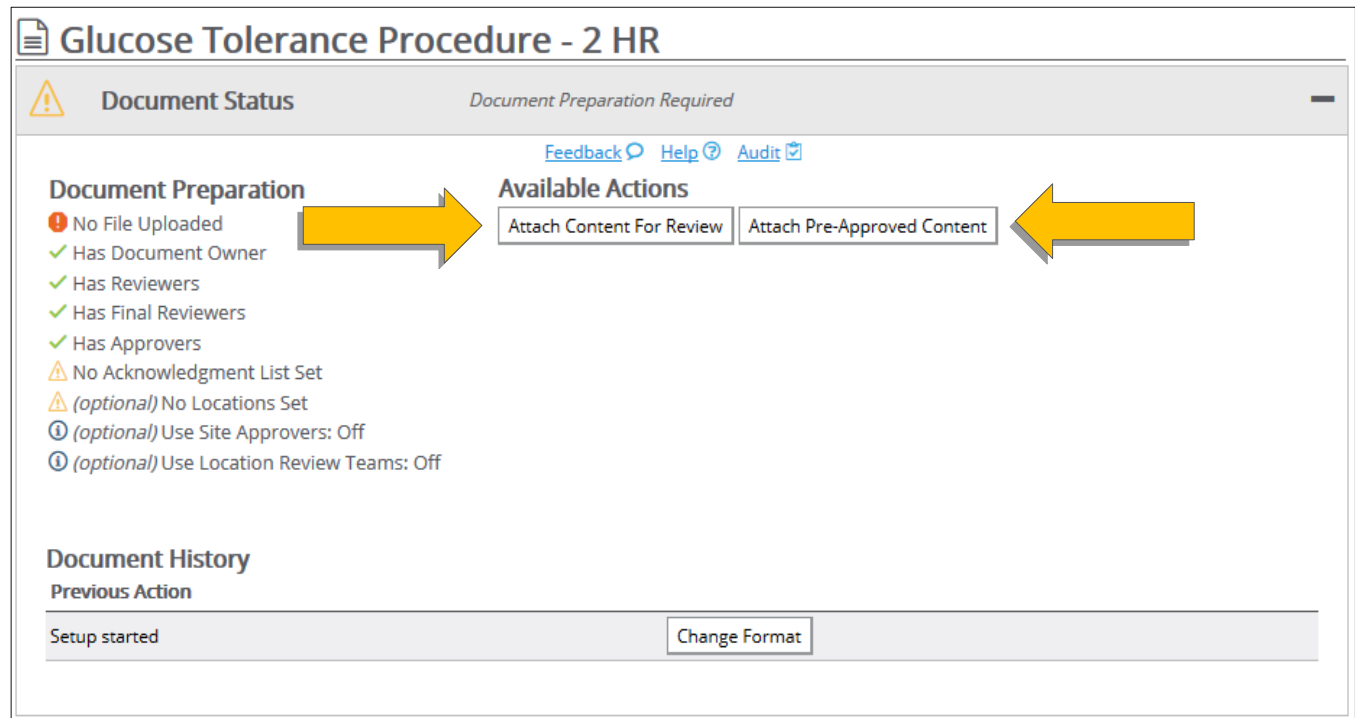
- Document Name\***: Text input field containing "Glucose Tolerance Procedure - 2HR".
- Document Type\***: Dropdown menu with "File or URL" selected.
- Locations**: A container with two items: "x Lab (Site: Kendal Yards Clinic)" and "x Lab (Site: Hawthorne Clinic)".
- Site/Location Link**: Two checked checkboxes: "Use Site Approvers" and "Use Location Review Teams".
- Classification\***: Text input field containing "[not set]".
- Subject**: A link labeled "Chemistry" with an information icon (i).
- Time Between Reviews\***: Dropdown menu with "1 Year Interval" selected.
- Description**: A large text area for entering a description.
- Save Changes**: A button at the bottom of the form.

Yellow arrows point to the "Document" tab, the "Time Between Reviews" dropdown, the "Subject" link, the "Description" text area, and the "Save Changes" button.

10. Next, click the **Document Status** color bar to open it.



11. Click the **Attach Content For Review** or the **Attach Pre-Approved Content** button. This opens the **Attach Content** window.



12. You can attach content to the document by uploading a file from your device or linking directly to a web page.

► **Attach a File:**

- Select **Attach a File**.
- Click the **Choose File** button.
- Select the desired file.

► **Link a Web Page:**

- Select **Link a Web Page**.
- Insert the desired web address into the text field.

13. After selecting the desired content, click the **Save** button.

