



Document Library Quick Guide

The HQ™ Document Library

The Document Library is a vital part of the complete document management system in HQ™. The fields created using the Document Library may be accessible from specific areas of Connect™ and Relate™, as well as records contained in HQ™, depending upon your organization's configuration and licensing.

This powerful feature allows you to store online documents in a format that offers easy link creation and document retrieval from within individual records. These documents remain associated with the selected record for as long as the link is recorded and the document is in the library. Unlike the Shared Files feature, the Document Library itself cannot be made available to outside users, but remains a secure library for the internal use and management of critical documentation. Also note that users who need access to Document Library links must have an HQ™ license.

Access links created from the Document Library can be applied to any record in Relate™, providing that:

- A document field has been added to one or more of the forms used with the selected record and
- The appropriate document has been uploaded to the library

To access the document for any record where a document has been attached, simply navigate to the form containing the link and click on the Open button. The item stored in the Document Library will open in a separate window. If you need to make changes to the document, save it to your computer and make the necessary alterations. If desired, reload the modified document to the library and update the link to reflect the new document.

Adding a Document Field

- In Relate™, select the form to contain the document link and click the edit pencil icon
- Click Text Field on the New Data Field drop-down
- Fill the fields as desired, then check "Web URL" radio button and "Show Media Picker" checkbox
- Click the Save button



Loading a Document to the Library

- Find an instance of the Document Library link and click to open
- Click the Add File button
- Click the Browse button and navigate to the desired file
- Select the file name
- Verify that the file is named as desired and located where needed
- Click the Save button
- Close the library

Creating a Document Link

- Select a record with a form containing a document link field
- Click on the name of the form containing the document link field
- Select the Document Library link
- Click on the underlined name of the document

Using the Document Link

- Navigate to the record and form containing the document link
- Click on the Open button
- If you wish to edit the document, save to your computer and make the changes there
- If you wish to link the edited version, use the above procedures to upload and link the document