



Working with the Document Library

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.

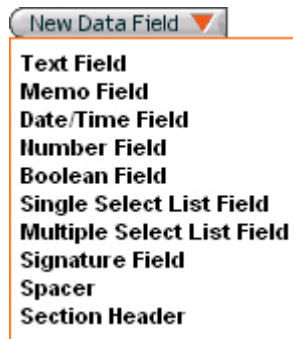
Access links created from the Document Library can be applied to any record in Relate™, providing that:

- 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

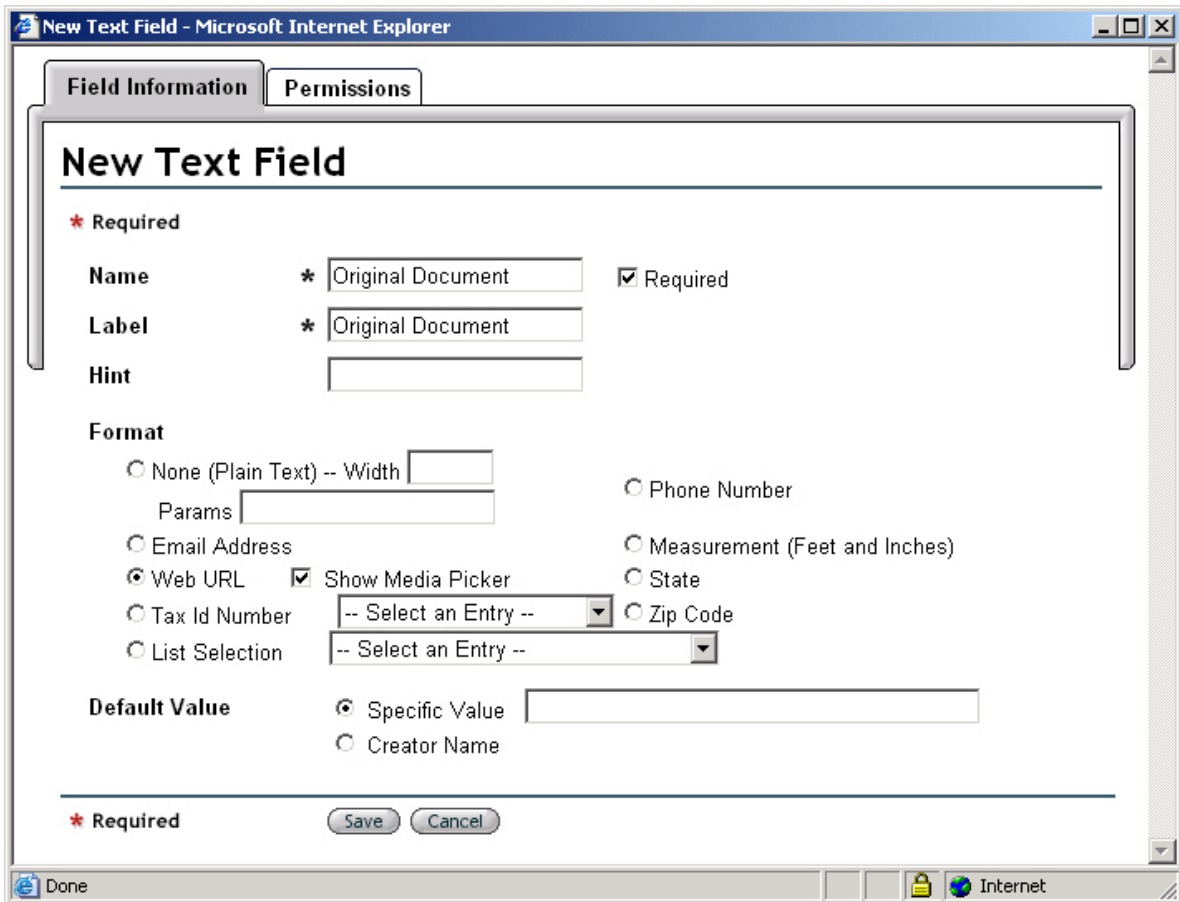
Adding a Document Field

Users who have a Relate™ license can add a document field to any Relate™ form where it is appropriate to store the document link. To add a document field, navigate to Relate™ and click the Relate Forms link on the Admin drop-down. Click on the edit pencil icon  opposite the name of the desired form. You may also add this field to a new form during its creation.

When the Edit Form or New Form screen returns, make entries as desired, then look for the New Data Field button on the lower right. Mousing over this button produces a drop-down of all the available field types, seen below.




Select the Text Field link. On the resulting screen enter values for all fields as desired, then move to the Format section. Click the radio button for Web URL and select the checkbox “Show Media Picker”, as shown below, allowing access to the Document Library contents. Click the Save button at the bottom of the screen.



When all aspects of the form have been created and the fields are in the correct order, click the Save button at the bottom of the New Form or Edit Form screen. This will post all new fields and any other changes you have made to the form.

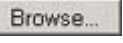
There is no limit to the number of document links that can be created on a form and creating a document link on one form does not preclude creating document links on as many other forms as needed.

Loading a Document to the Library

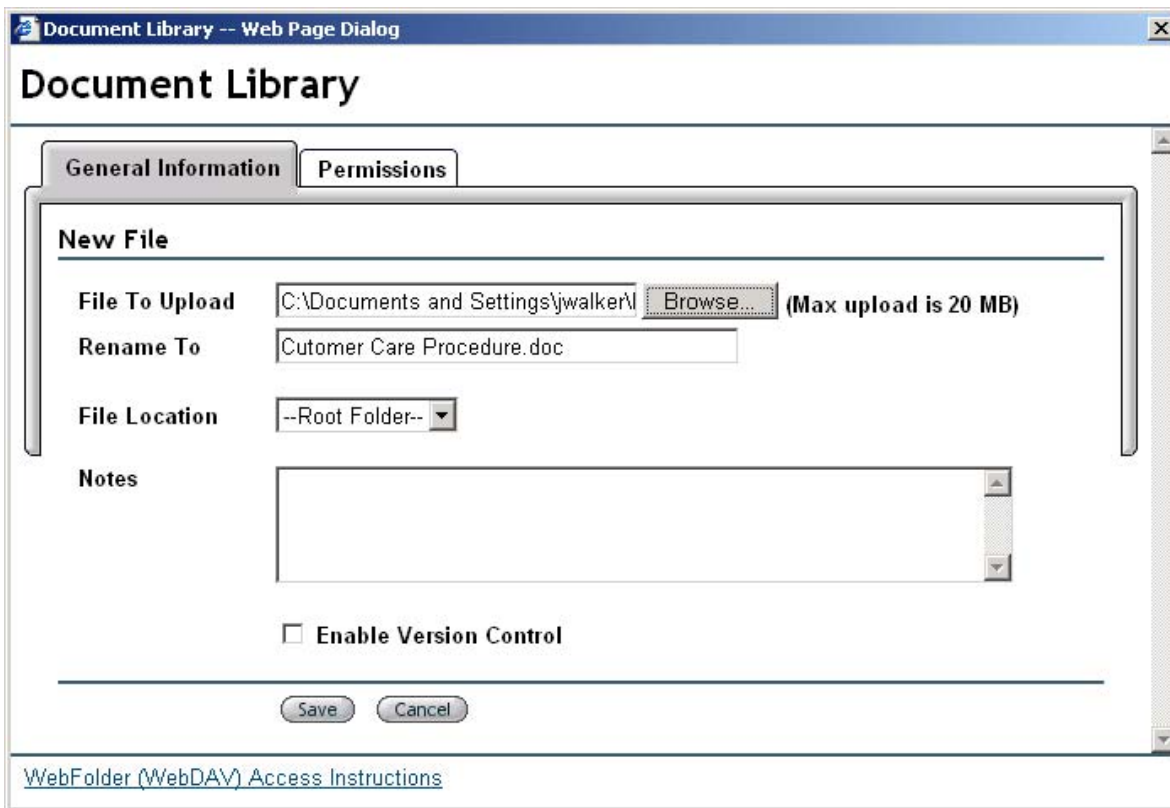
Any documents located on your computer can be stored in the Document Library. Once a document field has been created in Relate™ and appears on a record form, a library link  [Document Library](#) will also be visible in the area to the right of the document field.

To load a document to the library, click on the Document Library link at any place where it appears. The Document Library screen will open, as seen below.





Any files or folders that have been previously uploaded into the library will be displayed. To add a new file, click the Add Files button on the upper right for a file upload screen. On the resulting screen click the Browse button . This will open a pop-up window displaying files, folders, drives and networks on your computer, allowing you to navigate to the file you wish to upload.

The Document Library has a 20 megabyte upload limit. If the file does not exceed that limit, click on the file name, which will place that name in the File to Upload field.



The Rename To field will be automatically filled, but you may change the name entry, if desired. Click the Save button and be patient. File upload may take a few minutes. When done, the Document Library screen will reappear with the new entry displayed at the bottom.

 **Please click the Save button only once.** Clicking it more than once may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

The Document Library window will reappear with the new file added to the bottom of the list. If uploading the document completes the actions you need to take, close the window by clicking the close icon  in the upper right.

Creating a Document Link

Adding a document link to a record is very easy. As indicated above, two conditions must exist:

- A document field must have been added to the appropriate form that is used with the selected record and
- The necessary document must have been uploaded to the library

To populate a document link field for any given record, select the record, then select the form where you want the link to appear (and where the document field has been created) by clicking on the form



name either in the left-side navigation menu or where it appears as a section header. The entire form will be presented with all recorded data. Scroll down to the Document Field, example below.

Document Link * [Document Library](#)

In this example, the field has been named “Document Link”, but the link field will have been named at the time it was created and will appear labeled with the name chosen at that time.

Click on the Document Library link to the right of the field. The Document Library will be displayed, similar to that shown below, containing all the folders and fields that have been uploaded by your organization.




Click on the underlined name of the document you wish to have linked to the Relate™ record with which you are working. The internal URL will appear in the field, similar to that shown in the example below. Scroll to the bottom of the form and click the Save button.

Document Link * [Document Library](#)

Using the Document Link

Once a document field has been populated with a link, this document will remain attached to the record for as long as the URL remains in the field and the document resides in the Document 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.



Step-by-Step in the Document Library

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