

How to Create a Document Type

1. On user's menu panel, click **Document Management**
2. Open **Document Type**
3. Click the **New** action button to open a new record.

Document Type -

New Save Search Delete Undo Commit Close

Details

Name *

Properties

+ Insert X Remove ▲ Move Up ▼ Move Down View Filter (F3)

Field Name*	Field Type*	Required
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? Ready Page 1 of 1

4. Enter a **Name** for the Document Type
5. Enter a Field Name on the grid
6. Select a Field Type, field types can be any of the following:
 - a. Text Box
 - b. Text Area
 - c. Drop Down
 - i. If a field is a Drop down, click on the row then click Item List button

Document Type - Sample Type

New Save Search Delete Undo Commit Close

Details

Name * Sample Type

Properties

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Field Name*	Field Type*	Required
Name	Text Box	<input checked="" type="checkbox"/>
Gender	Drop Down	<input type="checkbox"/>

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- ii. Add the drop down values in the following screen
 - d. Integer
 - e. Decimal
 - f. Date
 - g. Check Box
7. If a field/s should be required, check the Required column in the same row of the field
 8. Click **Save** when done
 9. Click the **Commit** button so that the Document Type can be selected in the **Document Source**
 - a. If the Document Type was not committed, it will not show up in the selection on **Document Source**
 - b. Once the document has been committed, the Delete button will be disabled. The user is not allowed to delete the record anymore.

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