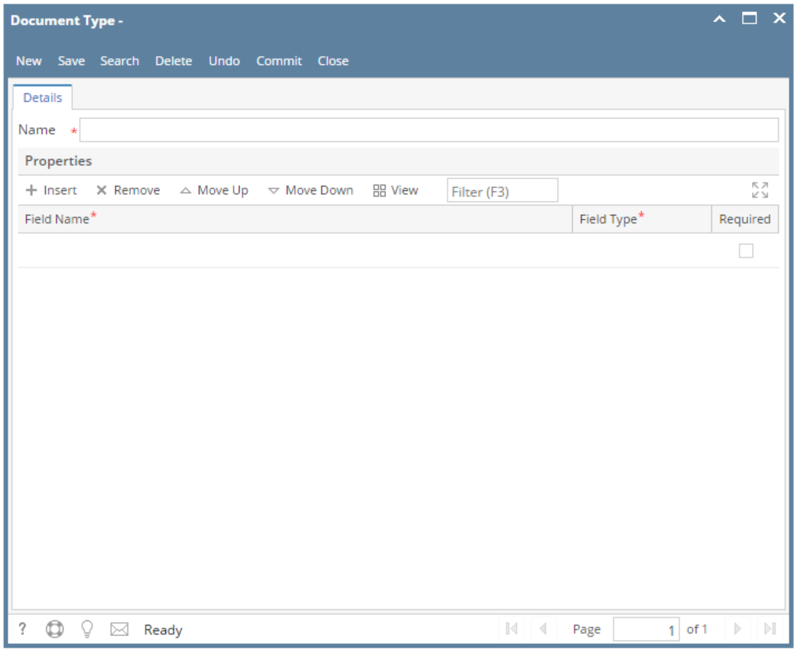
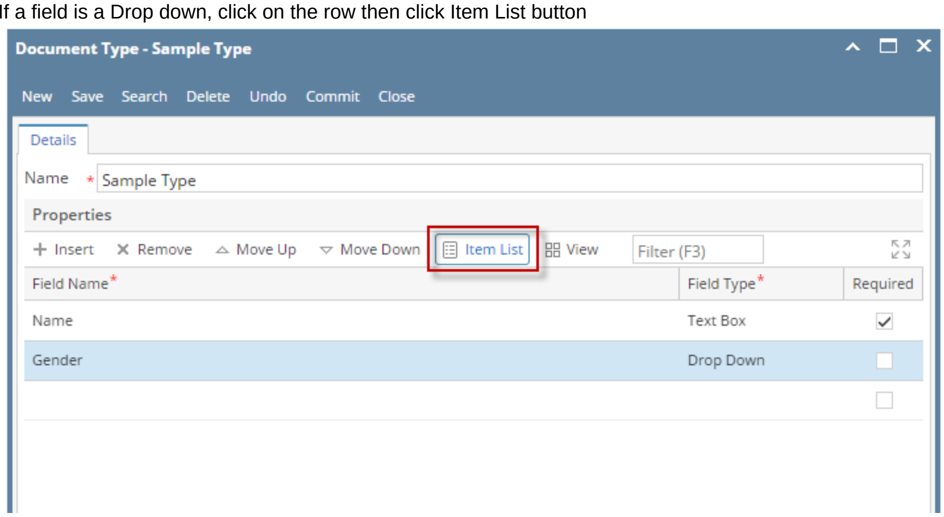
# How to Create a Document Type

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




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




      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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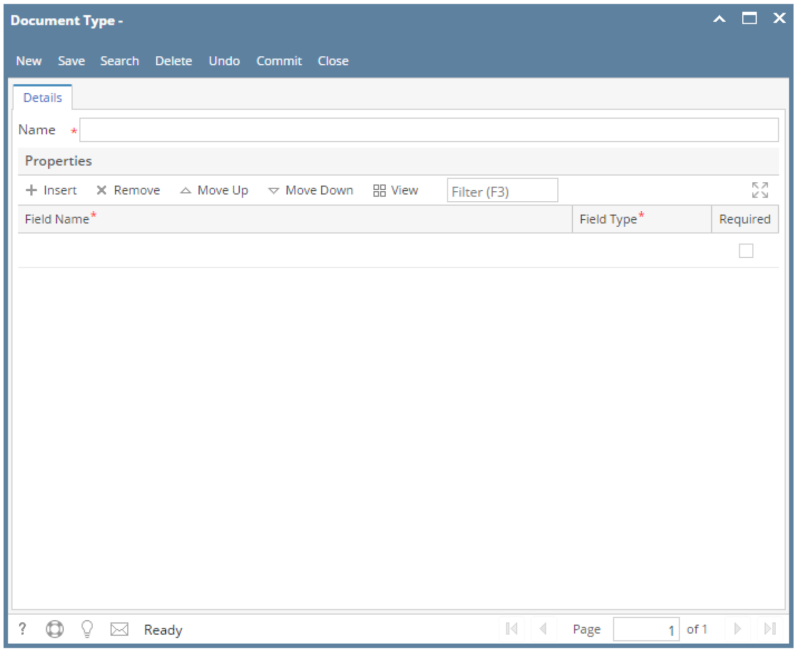


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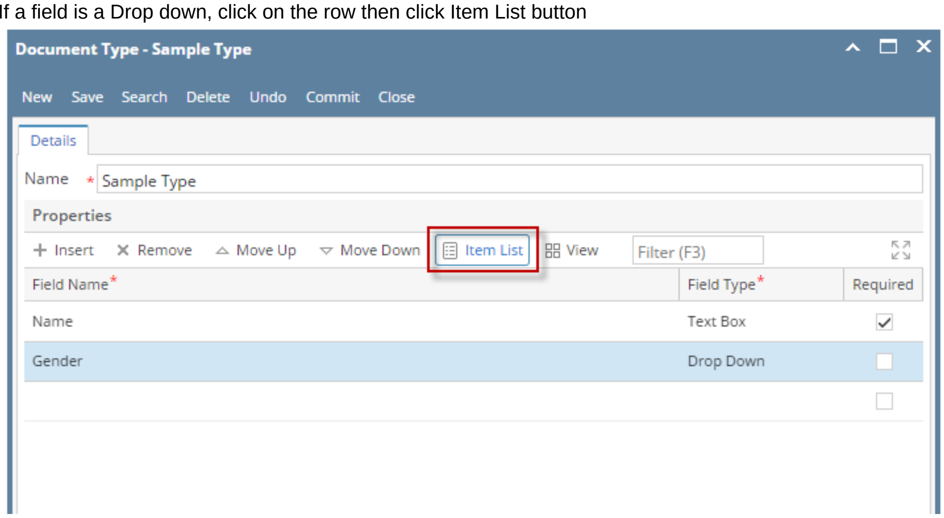


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