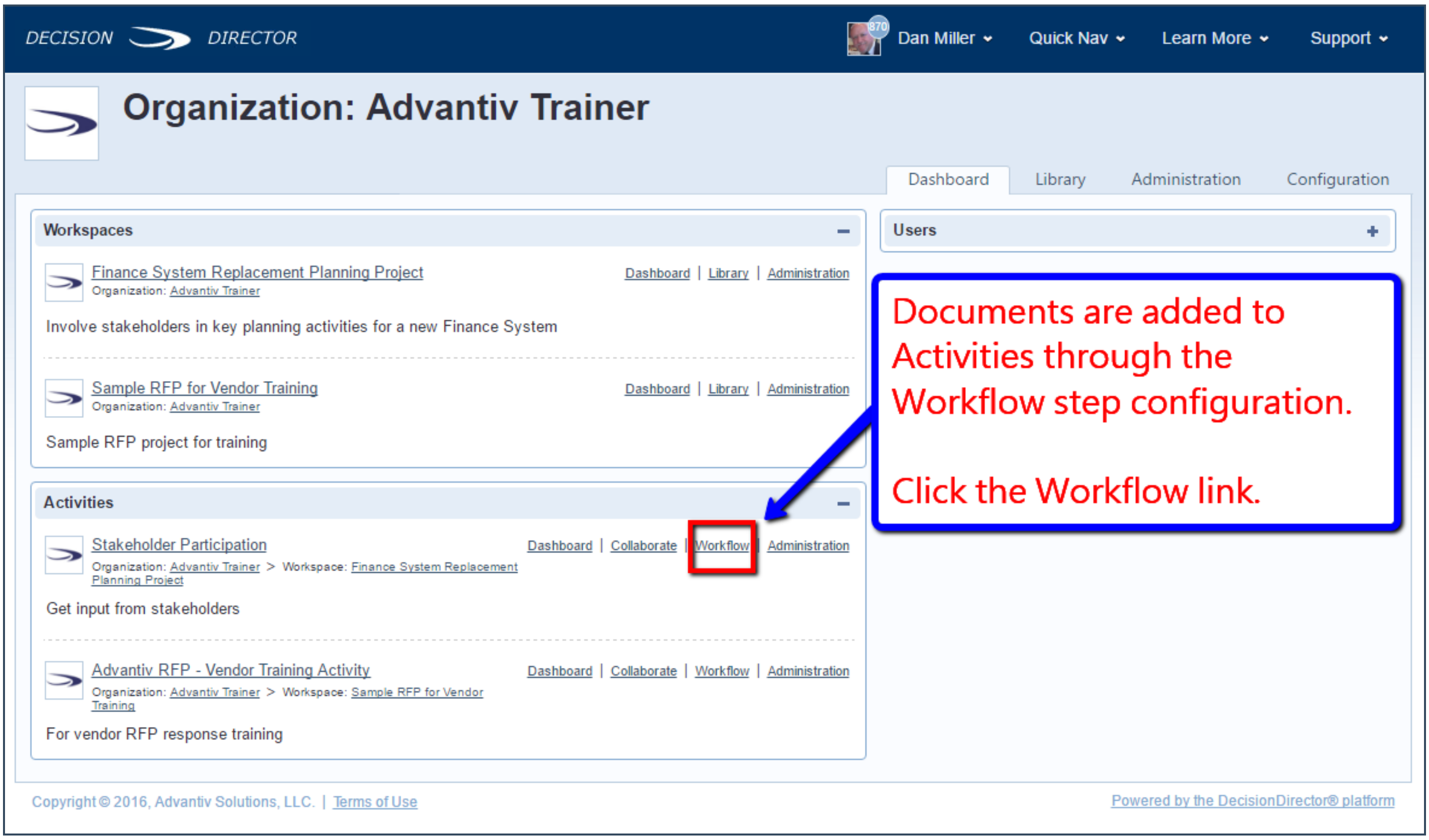
Adding Documents to Activities

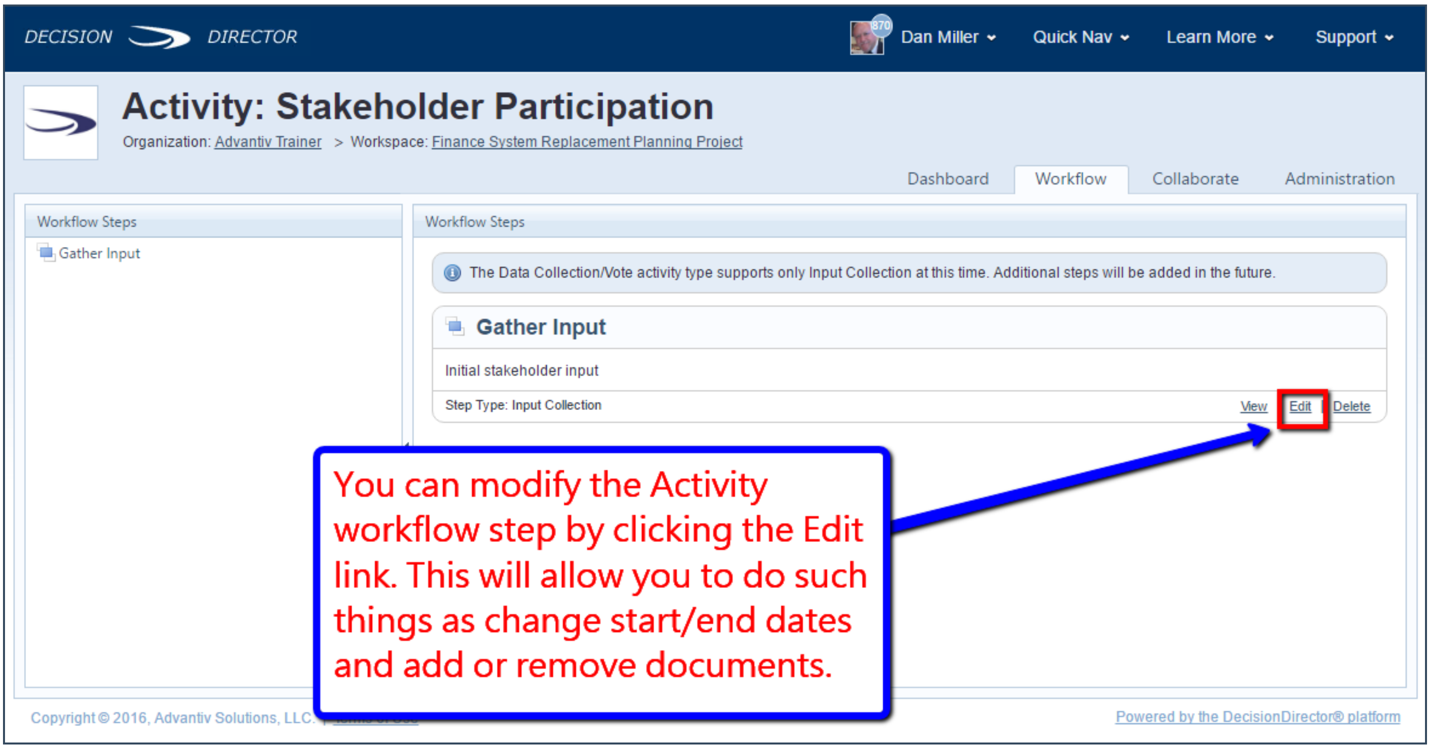
Last Modified on 07/26/2016 3:24 pm MST

This topic covers adding documents to activities.

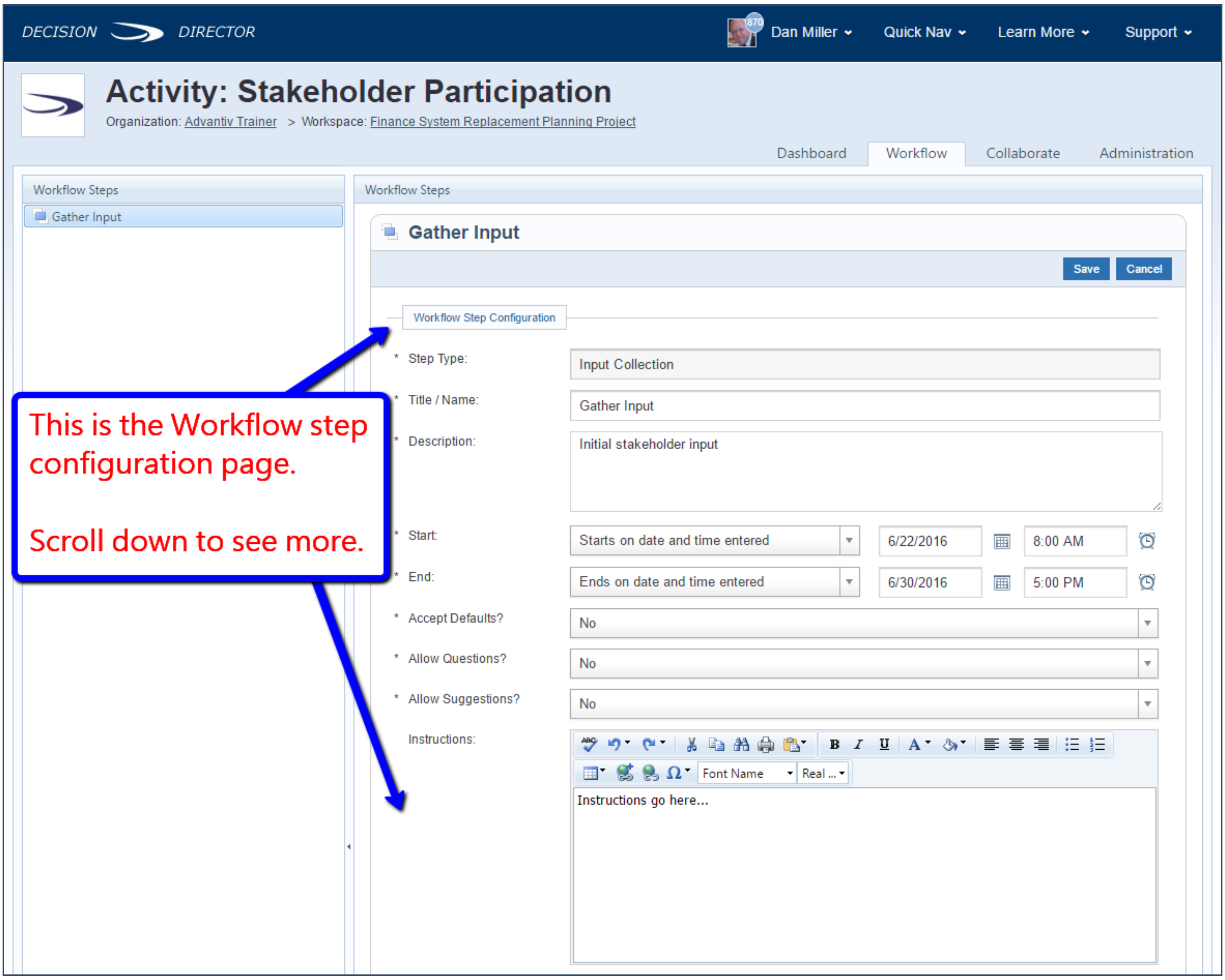
Accessing the Activity Workflow Step Page



Editing the Activity Workflow Step



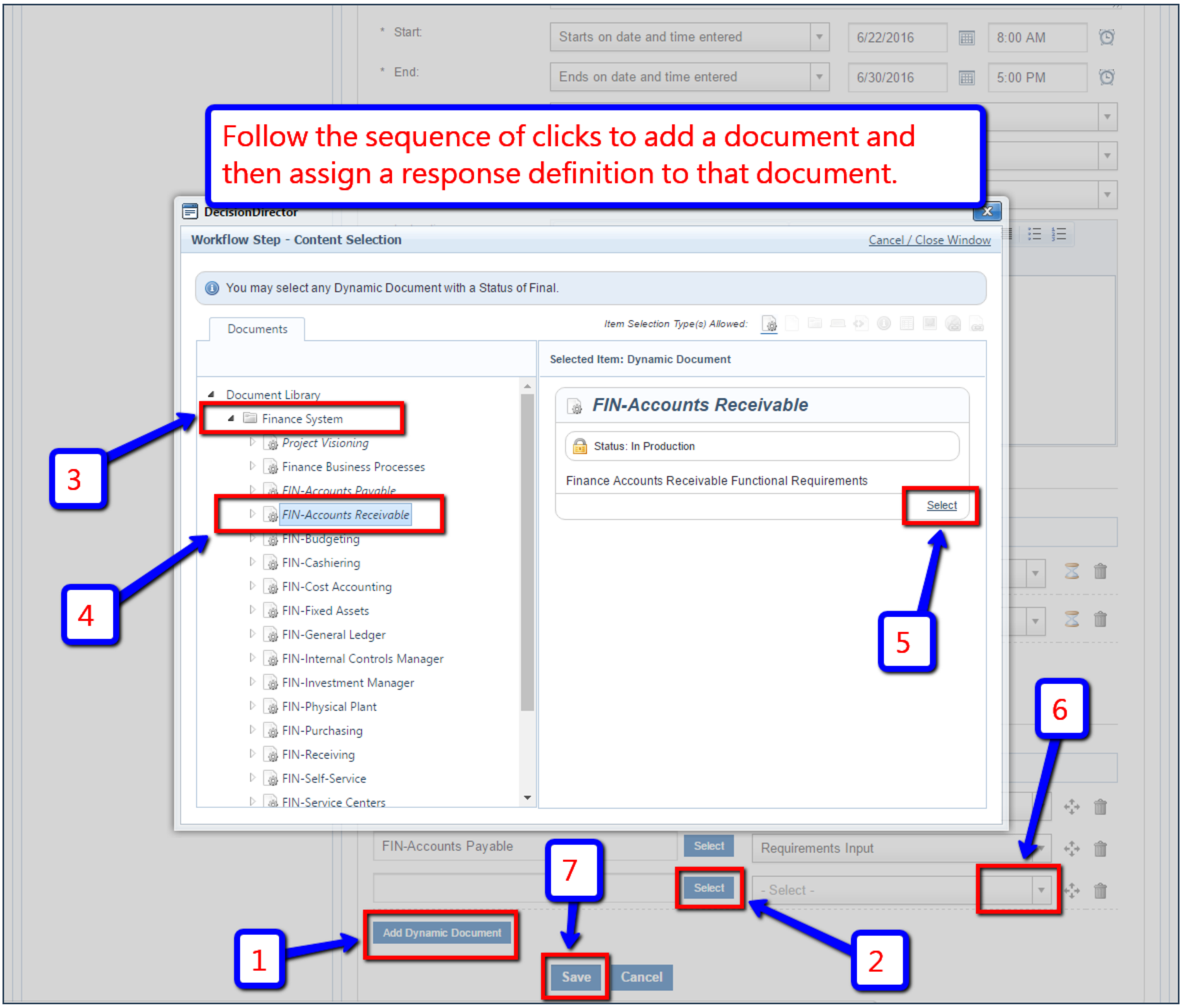
Reviewing the Activity Workflow Step Configuration



Adding A Document

Adding a document involves selecting a document and then assigning a corresponding response definition. Follow the steps below, in order, to accomplish this.

NOTE: Documents must be in Final/In Production status before they are eligible for selection.



Removing a Document

To remove a document, click the trash can icon associated with the document you intend to remove.

NOTE: Be cautious when removing documents. When you remove a document, you also lose access to any corresponding responses that may have been provided by activity contributors within that document.