

# Adding Documents to Activities

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This topic covers adding documents to activities.

## Accessing the Activity Workflow Step Page

The screenshot displays the Decision Director web application interface for the organization 'Advantiv Trainer'. The top navigation bar includes the 'DECISION DIRECTOR' logo, a user profile for 'Dan Miller', and links for 'Quick Nav', 'Learn More', and 'Support'. The main content area is divided into 'Workspaces' and 'Activities' sections. The 'Workspaces' section lists two projects: 'Finance System Replacement Planning Project' and 'Sample RFP for Vendor Training'. The 'Activities' section lists two activities: 'Stakeholder Participation' and 'Advantiv RFP - Vendor Training Activity'. A red box highlights the 'Workflow' link in the navigation menu for the 'Stakeholder Participation' activity. A blue arrow points from a text box to this link. The text box contains the following instructions:

Documents are added to Activities through the Workflow step configuration.  
Click the Workflow link.

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## Editing the Activity Workflow Step

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## Activity: Stakeholder Participation

Organization: [Advantiv Trainer](#) > Workspace: [Finance System Replacement Planning Project](#)

Dashboard Workflow Collaborate Administration

Workflow Steps

- Gather Input

The Data Collection/Vote activity type supports only Input Collection at this time. Additional steps will be added in the future.

**Gather Input**

Initial stakeholder input

Step Type: Input Collection

[View](#) [Edit](#) [Delete](#)

**You can modify the Activity workflow step by clicking the Edit link. This will allow you to do such things as change start/end dates and add or remove documents.**

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## Reviewing the Activity Workflow Step Configuration

DECISION DIRECTOR Dan Miller Quick Nav Learn More Support

## Activity: Stakeholder Participation

Organization: [Advantiv Trainer](#) > Workspace: [Finance System Replacement Planning Project](#)

Dashboard Workflow Collaborate Administration

Workflow Steps

- Gather Input

**Gather Input**

Save Cancel

Workflow Step Configuration

- \* Step Type: Input Collection
- \* Title / Name: Gather Input
- \* Description: Initial stakeholder input
- \* Start: Starts on date and time entered 6/22/2016 8:00 AM
- \* End: Ends on date and time entered 6/30/2016 5:00 PM
- \* Accept Defaults? No
- \* Allow Questions? No
- \* Allow Suggestions? No

Instructions:

Instructions go here...

**This is the Workflow step configuration page. Scroll down to see more.**

# 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.

Follow the sequence of clicks to add a document and then assign a response definition to that document.

The screenshot shows the 'Workflow Step - Content Selection' dialog box in the DecisionDirector application. The dialog box is titled 'Workflow Step - Content Selection' and has a 'Cancel / Close Window' button in the top right corner. A message at the top states: 'You may select any Dynamic Document with a Status of Final.' Below this, there is a 'Documents' tab and a 'Document Library' tree view. The 'Document Library' tree view is expanded to show the 'Finance System' folder, which contains several sub-folders, including 'FIN-Accounts Receivable'. The 'FIN-Accounts Receivable' folder is selected. To the right of the tree view, the 'Selected Item: Dynamic Document' section displays the details for the selected document: 'FIN-Accounts Receivable', with a status of 'In Production' and 'Finance Accounts Receivable Functional Requirements'. A 'Select' button is visible next to the document details. At the bottom of the dialog box, there are 'Add Dynamic Document', 'Save', and 'Cancel' buttons. The background shows a workflow step configuration interface with a 'Requirements Input' section. A 'Select' button is visible in the 'Requirements Input' section. A 'Save' button is also visible at the bottom of the background interface. The steps are numbered as follows: 1. Click 'Add Dynamic Document' at the bottom of the dialog box. 2. Click the 'Select' button in the 'Requirements Input' section of the background interface. 3. Click the 'Finance System' folder in the 'Document Library' tree view. 4. Click the 'FIN-Accounts Receivable' folder in the 'Document Library' tree view. 5. Click the 'Select' button next to the 'FIN-Accounts Receivable' document details. 6. Click the 'Select' button in the 'Requirements Input' section of the background interface. 7. Click the 'Save' button at the bottom of the dialog box.

# 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.