**How to Attach a Document to a Record in the Back Office**

1. Go to the Documents tab on the record > click NEW > select the appropriate ‘Document Type’ from the dropdown. IMPORTANT NOTE: any doc type that is 'Plans' will be restricted from view/download online, except by those people associated to the record, as plans are protected by copyright. Then fill in the ‘Document Name’ - this often is a more descriptive meaningful name than the filename, ex. building plans, then click ADD to actually attach the document:



***(steps continued on next page)***
2. Click the SELECT FILE button to browse to the file, locate the file. IMPORTANT NOTE: the system only sees your local PC, it does not see your network or shared drives, so it is important to first save the document to your local C:\ before it can be attached. Once the document uploads to 100%, click ADD to move to the next screen:


3. Once the next screen loads, review the document details along the bottom of the window. IMPORTANT NOTE: ACA Permissions are set to follow the Document Type Security as defined in the Model - if you wish to change this default security, you would select the 'Change' link just to the right; the change screen is not a representation of the document's current security, it is a blank form for you to fill in accordingly. *NOTE, any changes to default document security are the sole responsibility of the agency.*
4. Finally, if all is correct on the document details, click SAVE to save the attached document to the record. You’re done! ☺

**Current Model Document Type Security Matrix**

Review this article in the Knowledgebase for further information on how to change the ACA Permissions on documents – this article includes the current Model Document Type Security matrix.

http://orepermittinghelp.kayako.com/Knowledgebase/Article/View/document-permissions