Add and View Documents

In several windows throughout the program, you can add and view additional documents that support the information you entered in those windows.

> ⓘ **Useful Information**
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> This feature is a file browser rather than a file manager. Within the program, you can link to a document on your computer or from your scanner to save it as a .bmp or .jpg image. Use the appropriate file editor to make changes to your document before associating it with a record in your PDS program.

Storing the Documents

Before using this feature, first decide where to store the documents on your local PC or network.

1. On the File menu, click **Setup** > **Initial Setup**.
2. Next to Document Folder, click **Browse** to select the location of the folder where you want to store the documents.

   > ⓘ **Useful Information**
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   > If you run the program on a network, PDS recommends that you create a folder on your hard drive to store these files. This makes it easier to share the files with other users in your network.
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   > To include these files in your regular data backup, create the storage folder as a subfolder of your Data folder. Files stored outside of the Data folder are not included in the backup. To locate the Data folder's path, click **About** on the File menu.

   > ⚠ **Note**
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   > If you change the default document folder once you've started using it, make sure you move all your files to the new location.

3. Click **Save/OK**, then **Close**.

Adding Files

After selecting a location to store the documents, you can add files from several locations in the program. PDS accepts most document and image file types, including .doc, .txt, .rtf, .pdf, .jpg, .jpeg, .bmp, and .png.

⚠

> ⚠️ **Notes About Personnel Documents**
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> - Any documents you add in the All Personnel window are visible to anyone with access to personnel. These are "general" documents.
> - When you add a document to a specific personnel section (such as Staff), this document will only be visible to users who have access to that section.
> - The Clergy Estate/Will window has a separate documents section. Documents that you attach here are only visible to users who have access to this window.

1. In a window with this feature, click **Add Documents**.
2. Click **Yes** if you already have a subfolder set up for the document(s) you want to add. Otherwise, click **No** to have a subfolder created for you.
3. Click **Add File**, select the document you want to add, and click **Open**.

   > ⓘ **Useful Information**
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   > You can also click **Scan** to capture a new image using your scanner. Click **Scanners** in the Documents dialog box to select your scanner options.

4. Click **Save**, then **Close**.

Viewing the Documents

Once you have linked files to records in your program, click **View Documents** to view the files associated with the current record.

Additional Fields Information

Scanners
Provides options for how you want to scan and name your documents. You can select one or more of the following options:

- **Automatically Assign Unique Filename on Scan** — Automatically give the scanned document a unique name. If you don't select this, you're prompted to name the document.

- **Show Scanner Interface on Scan** — Show the properties of your scanner and the scanning progress through your scanner's interface.

- **Default File Format on Scan: BMP/JPG** — Save your document in the selected file format.

- **Choose the Scanner on Scan** — Select which scanner to use if you have multiple scanners. If you only have one scanner or always want to use the default, don't select this option.

Image Processes
Provides options to rotate your image clockwise by 90 degrees, 180 degrees, or 270 degrees.

Zoom
Provides options to view your image in different modes: Full Page, Full Width, or at a certain percentage.

Delete File
If you delete a single file, you have the option to delete the original file from your computer. If you delete it, the file is moved to the Recycle Bin on your computer.

Scan
Scan a new document into the program using a scanner connected to your computer. Before scanning, select your scanner options on **Scanners** in the Documents dialog box. This is not available in OnDemand.

Remove
Removes the association between the file and the record. The link to the subfolder that contains the files is removed from the program. The subfolder and its contents are still available in the original location on your computer.

Related Topics

Set Initial Program Options
Reports