



Documents

Refers to:

Company form → documents tab

vacancies form → documents tab

Candidate form → documents tab

You may link any type of document, for example, directions, copies of terms of business and agreed rates.

- Documents added as Files cannot be edited after saving.
- Documents added as MS Office files can be edited.
- Only MS Word Documents can be attached to emails.

see also

[Documents](#)

(2.3.4+) Documents can be archived in all document views: [Archiving](#)

Document Filtering

(2.3.5+)

In Person, Placement, Company, Vacancy and Progress filtering has been added to the document view.

This feature allows searching and filtering of Document State and Type along with key word searching in the description.

The screenshot shows the 'Documents' tab selected in a sidebar. The main area contains a toolbar with buttons: Expand, Add File, Add MS-Office Document, Add Link to File, Delete, Archive, Make Current CV, Copy to Compliance, and Show Details. Below the toolbar is a filtering section with a red border. It includes a 'State' dropdown menu set to 'All', a 'Description' text input field, a 'Type' dropdown menu set to 'All', and a 'Filter' button. Below the filtering section is a table header with columns: Description, Type, File type, Publish to Web, and In CV Send. The 'Publish to Web' and 'In CV Send' columns have checkboxes.

In addition, the sort order has been amended to place any archived records at the bottom of the list.

Separation of Compliance Docs and Docs

From version **(2.3.5+)** onwards there are separate views for Compliance Documents and Documents. [click here](#)



Back to [Online User Guides](#)

Back to [How to](#)

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