

Creating and Opening a Web-link Document

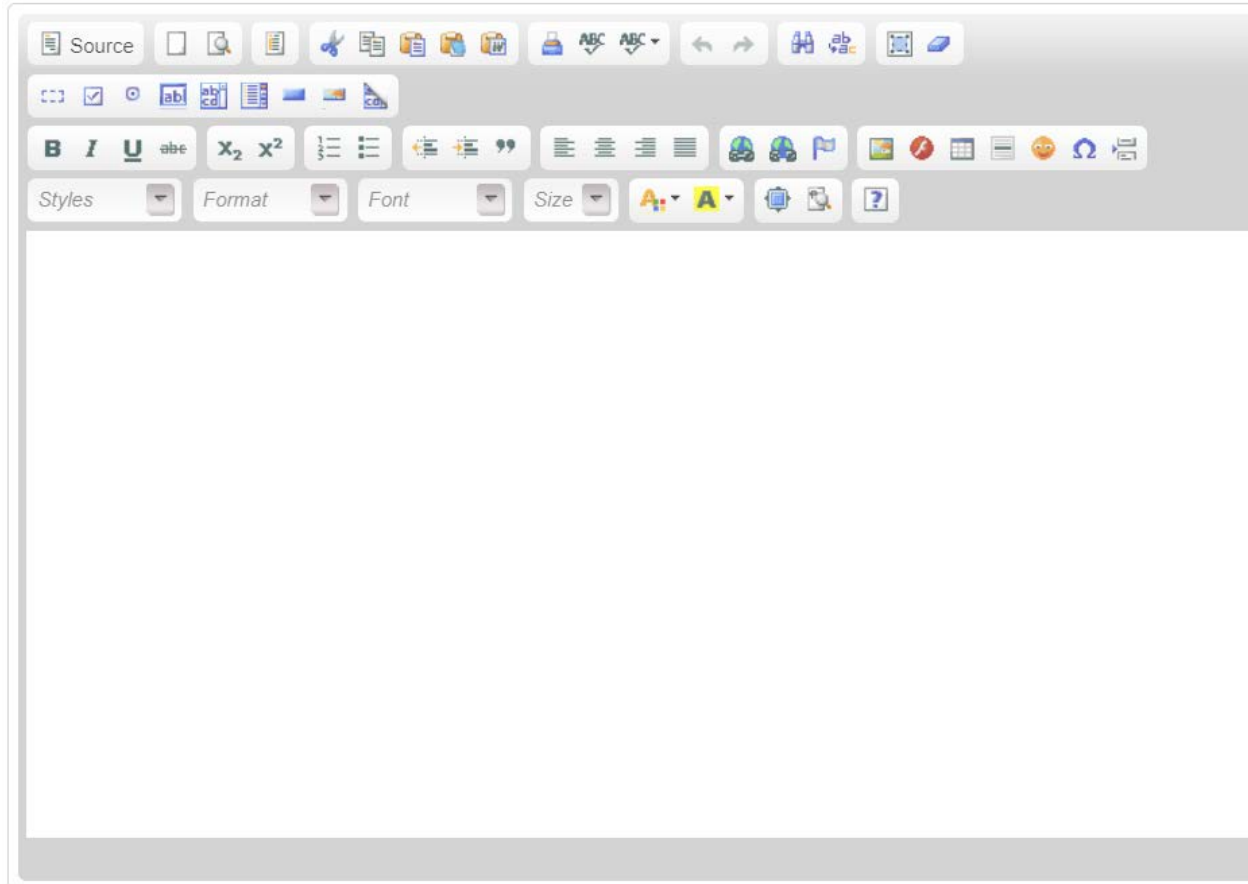
When creating a Document in Shadow-Planner, you have three choices:

- I. If you choose Internal Document, you may enter content directly into Shadow-Planner, using a WYSIWYG interface that looks like this:

Edit Internal Document Content

Reference

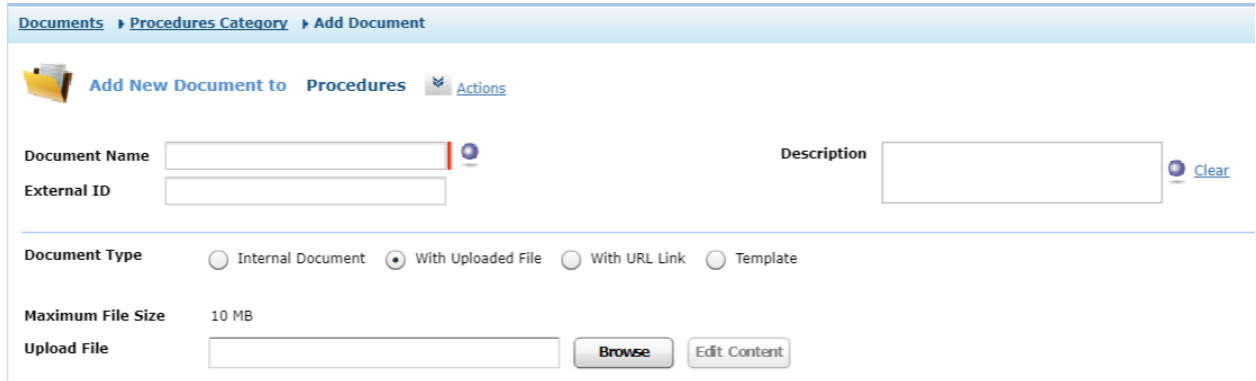
Internal Document Content



Remember to click Save once you have entered the content of the document.

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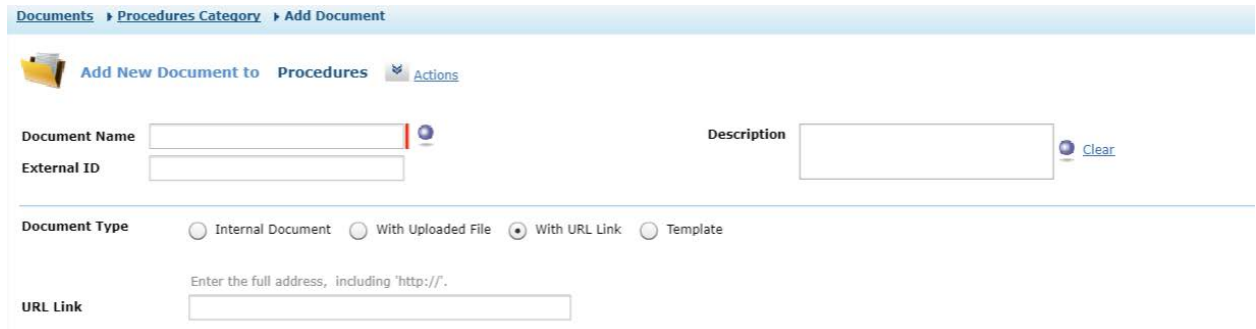
- II. If you choose With Uploaded File, the system will allow you to Browse your own documents so you can upload one of them.



The screenshot shows the 'Add Document' form in a web application. The breadcrumb trail is 'Documents > Procedures Category > Add Document'. The form has a header with a folder icon, 'Add New Document to Procedures', and an 'Actions' menu. There are two text input fields: 'Document Name' and 'Description'. Below them are 'External ID' and a 'Clear' button. The 'Document Type' section has four radio buttons: 'Internal Document', 'With Uploaded File' (which is selected), 'With URL Link', and 'Template'. Below this, the 'Maximum File Size' is set to '10 MB'. The 'Upload File' section has a text input field, a 'Browse' button, and an 'Edit Content' button.

Again, remember to click Save once you have selected the document to upload.

- III. If you choose With URL Link, you may enter the URL (remember to include http://).



The screenshot shows the 'Add Document' form with the 'With URL Link' radio button selected. The breadcrumb trail is 'Documents > Procedures Category > Add Document'. The form has a header with a folder icon, 'Add New Document to Procedures', and an 'Actions' menu. There are two text input fields: 'Document Name' and 'Description'. Below them are 'External ID' and a 'Clear' button. The 'Document Type' section has four radio buttons: 'Internal Document', 'With Uploaded File', 'With URL Link' (which is selected), and 'Template'. Below this, there is a text input field for the 'URL Link' with a placeholder text: 'Enter the full address, including 'http://'.

Again, remember to click Save once the link has been entered in the URL Link field.

There are two ways to open the URL, once this Document has been saved:

1. You may double-click on the name of the Document in the Documents list or in an Action Plan.

Creating and Opening a Web-link Document

Edit Action Plan LOSS OF HOUSEKEEPING SERVICES (WIDESPREAD) **Actions**

Action Plan Name LOSS OF HOUSEKEEPING SERVICES ()

Description WIDESPREAD LOSS OF HOUSEKEEPING SERVICES TO THE **Clear**

Editors KILIAN N FEENEY
JOSEPH DAVIS **Clear**

Restrict to Editors

Trigger	Actions	Responsible	Documents	Requirements
1	HOUSEKEER... ALERT FRES ALERT DIRE...	KILIAN N FEENEY JOSEPH DAVIS	1.url	Drop 'Resource Type' or 'Asset' or 'Contact' or 'Contact Group' or 'Local Process'

The document will be opened in view mode showing the URL

View Document 1.url **Actions**

Document Name 1.url

External ID auto_103213_1510262892804

Description

Document Type Internal Document With Uploaded File With URL Link Template

URL Link Enter the full address, including 'http://'.
http://www.bbc.co.uk/

Document Class Appendices

Then you may cut and paste the URL into any browser. OR . . .

2. Instead of double-clicking on the document name, if you click on the chevron arrow to the right of the document name, you can select View, View Approved – this will then open the link in a browser without the need to copy and paste it.

BC.Planning > **Plans** > **Edit Action Plan Test URL link**

Edit Action Plan Test URL link **Actions**

Action Plan Name Test URL link

Description **Clear**

Editors Drop 'Contact' **Clear**

Restrict to Editors

Trigger	Actions	Responsible	Documents	Requirements
1	Trigger 1	Drop 'Contact' or 'Contact Group'	URL	Drop 'Resource Type' or 'Asset' or 'Contact' or 'Contact Group' or 'Local Process'

Context menu options: View, Edit, Remove, View Attributes, View Approved, View Draft