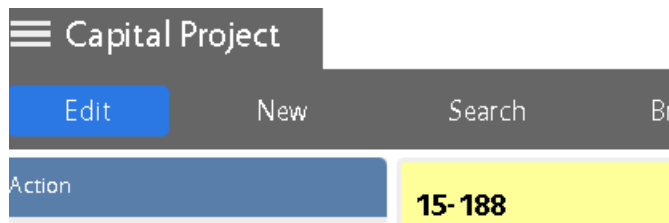


## Related Documents:

On many screens within AiM, you have the ability to attach a related document. This document can be virtually any type of file: PDF, MS Office, CAD Drawings, JPG, or many others. One thing to keep in mind when attaching a document is that you want to attach the document on the screen it applies to. For example, a SCOPE document would be attached to the main project screen; where a budget revision memo or report would be attached directly to the budget revision screen and an OA agreement or PSC would be attached directly to the Consultant Contract screen.

No matter what screen you are on, the HOW TO's of attaching a document are the same.

**First** Click the blue Edit Button



**Second**, click the Related Documents link under the View section on the left hand side of the screen

View

Extra Description

[Workflow](#)

Account Setup

Planned Budget Forecast

[Project Team](#)

Milestones

Activities

Property/Asset List

Labor Charges

Work Orders

Issues


[Received Email](#)

Sent Email

Notes Log

[User Defined Fields](#)

[Status History](#)

Related Documents 

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
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Attach

Link

Remove

Add

Click the blue ADD button to attach a new document

 **New Document**

**Next** Cancel

Upload File(s)

Add Meta Data

Add Attributes

Add Permissions

Please select document(s) to load:



No files selected.

Click the Browse button to locate the file(s).

*Note:* you can select multiple files as long as they are the same document type. For example, 3 PDF's could be selected at once. However, 1 PDF and 1 CAD Drawing would need to be loaded separately.

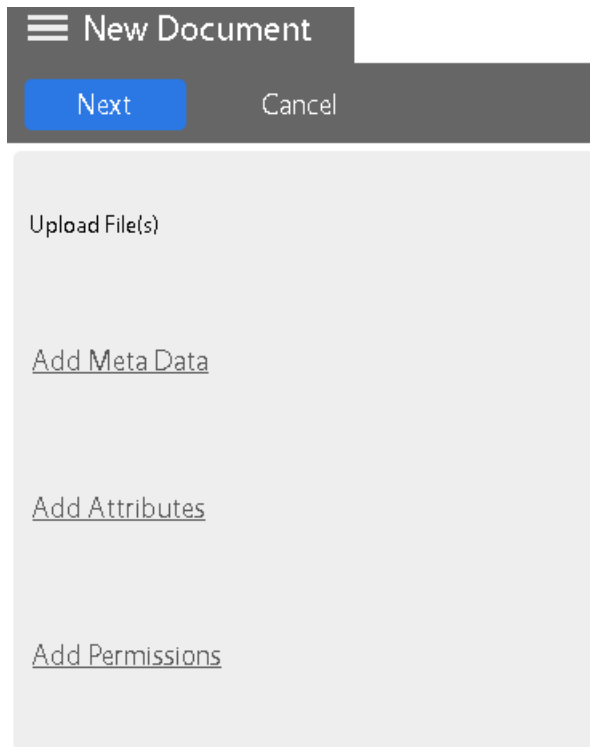
Click the blue Next button and select the Zoom to select the Document Type

Title

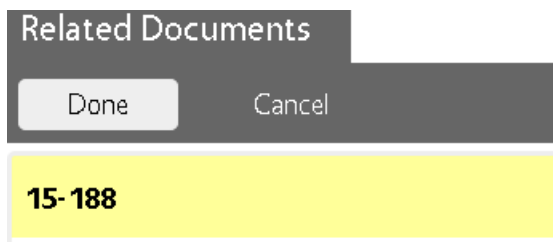
Type   

Tags

After you have selected the Document Type, you can click the Blue Next button 3 times to bypass the “Add Meta Data” “Add Attributes” and “Add Permissions” sections, as we are not using these at this time.



Click DONE



Click SAVE



Your document(s) are now attached to the project.