Documents Templates

Document template: It is an aid to add one or more documents within a specific template, where it can be said that the form is a parent document (a folder for example) that contains several documents (files) and each document may contain descriptors (information of its own) and attachments as well, but Within a pre-prepared template to facilitate and speed up work, as we use forms in the program for documents that are used permanently.

To demonstrate the models in practical terms, we will use an example employee documentation template:

The documents contained in the employee form are

personal information

Vacations

Education information

"And to access the documents samples from the menu "Archiving - Cards - Documents Templates

Click on the New button and then specify the name

In the Name field: Set a name for the document to be inserted into the template

And in the field Type: choose the type of document to be placed in the template

Descriptors: to link the set of descriptors to the document

After the template has been added, it can be applied as follows

Go to the archive from the "archiving then archive" menu, right-click on any empty place in the archive, then new, and then form. Choose the appropriate form, for example, a new employee form.

A new window will appear. Put the name of the parent document (the name of the folder or the folder) and choose the parent document as shown in the picture

After clicking OK, the form will be added, and the documents will be added to it as shown in the picture

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