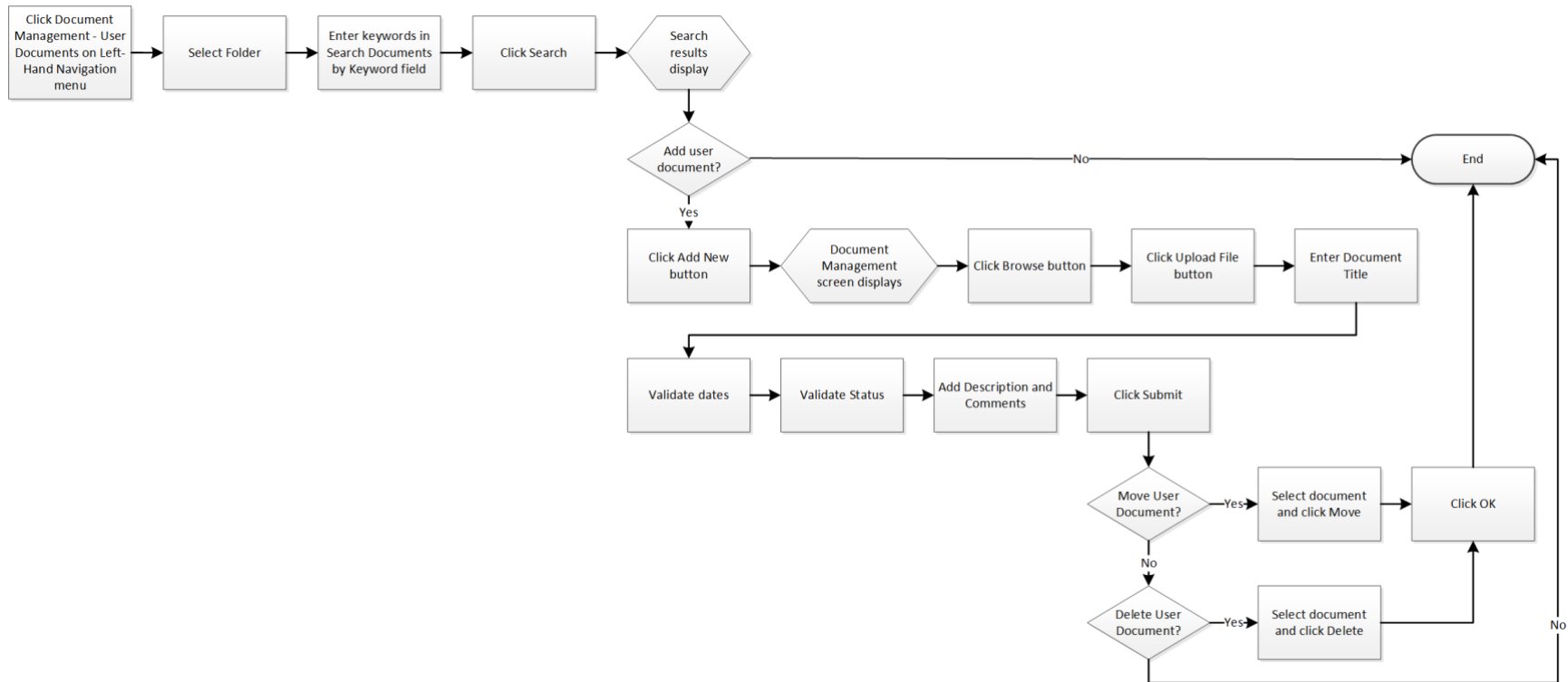


Search, Add, Move, Delete User Documents – QRC IOM 105-2.3



Points to Remember

- The **User Documents** screen supports the management of documents not directly associated to system records, i.e., context documents. Users can add, view, or delete documents in their personal folder, folders created by the user, and some workgroup folders.
- Click the + icon beside each folder to expand the folder structure.
- Using the **Search Document by Keyword** field is dependent on keywords being identified by the user when adding a new document.



Panorama Quick Reference Card



- Enter single words separated by a space. For example, 'dog cat' will retrieve all documents that contain the word 'dog' or 'cat'.
- To retrieve search criteria, click the **Retrieve** button. The screen is updated with the search criteria last entered/selected when the user last performed a search for the current Panorama session.
- To clear search criteria, click the **Clear** button.
- When uploading a new document, The **Effective From Date** defaults to today's date.