Create or import documents

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Context

Open the Company or Group document library, according to the available options. The documents will be used as plan attachments.

Starting point

Company or Group document library

Prerequisites

- Have the content to write or the PDF to import available.

Steps

1. Create with the editor

Click New document. In the editor, enter a title, write the content and format the page. Choose the available orientation, then save the document as a PDF.

2. Import an existing PDF

Click Import PDFs, then select the file. Specify whether to import only the selected page or all pages, then confirm the import.

3. Use the document

The document is now part of the library. At step 3 of a plan, find it in the left-hand list and drag it to the introduction or conclusion. Reorder attachments if necessary.

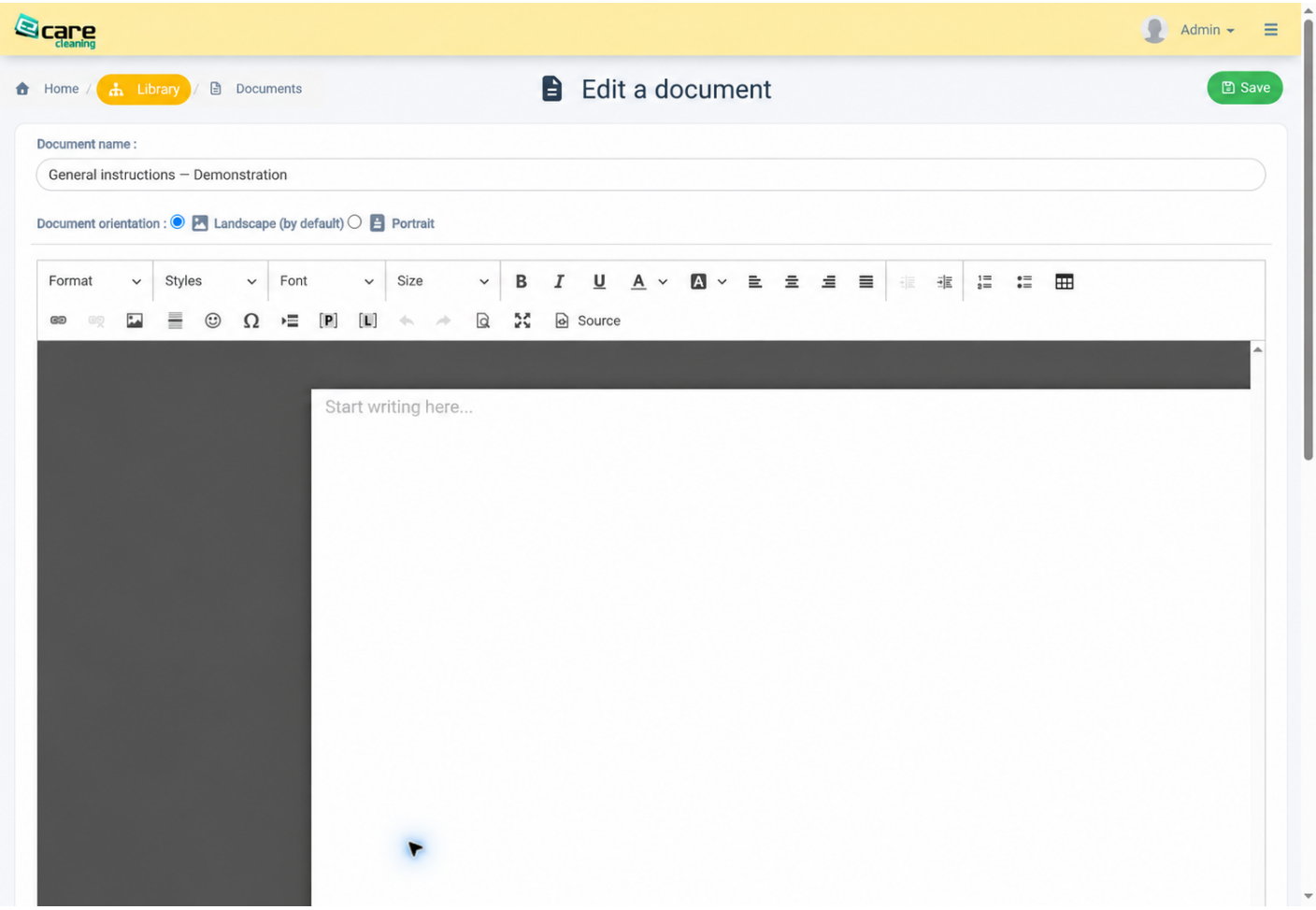
Expected result

The document becomes available at step 3 of plans.

Remember

- Static documents keep the same content. Dynamic documents are generated from the plan: check them in the final package. Their uses are detailed on page 22.

Illustrations



See also

- Place and organise attachments
- Distinguish static and dynamic documents

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