Place and organise attachments

Place and organise attachments

Context

At step 3, organise the pages placed before or after the plan content. Static and dynamic documents serve different purposes. Their positions determine the order of the final package.

Starting point

Step 3 — Documents

Prerequisites

- Prepare the documents in the Company or Group library.

Steps

1. Choose documents

The library is on the left. Find useful attachments: cover page, introduction, posters or monitoring sheets.

2. Place them in the package

Drag documents to Introduction to place them before the plan, or to Conclusion to place them after it.

3. Check the order

Reorder documents by drag and drop. Check their appearance in the final preview, especially dynamic documents.

4. Place and reorder

At step 3, the library is on the left, Introduction in the centre and Conclusion on the right. Drag documents to the appropriate panel, then reorder them by drag and drop.

5. Check after generation

Review the pages at step 5: products actually used, surfaces to monitor, procedures and attachment order. Check dynamic documents in the final plan.

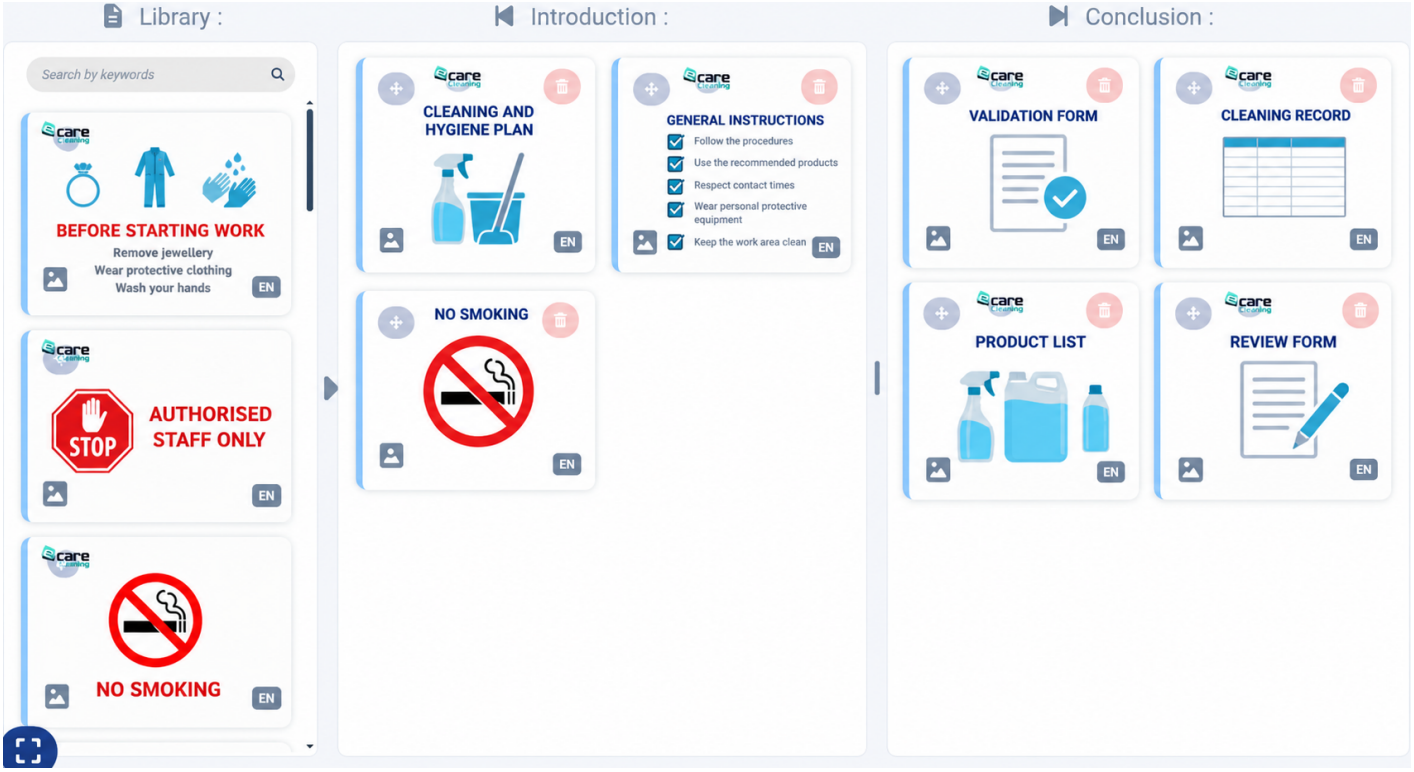
Expected result

The attachments appear before or after the plan, in the required order.

Remember

- Dynamic documents use the plan content, such as surfaces to monitor or products used.
- Use the Company or Group library according to your collaboration option. New document opens the editor; choose the orientation and save as PDF. Import PDFs imports a selected page or all pages.

Illustrations



See also

- Distinguish static and dynamic documents
- Create or import documents
- Check the package before delivery

Revision #4
Created 2026-11-23 11:25:57 UTC by eCare Content Studio
Updated 2026-11-23 15:23:26 UTC by eCare Content Studio