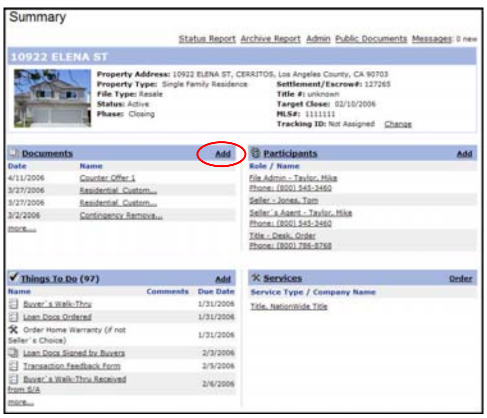
Creating a User Defined Document

Quick Reference Guide

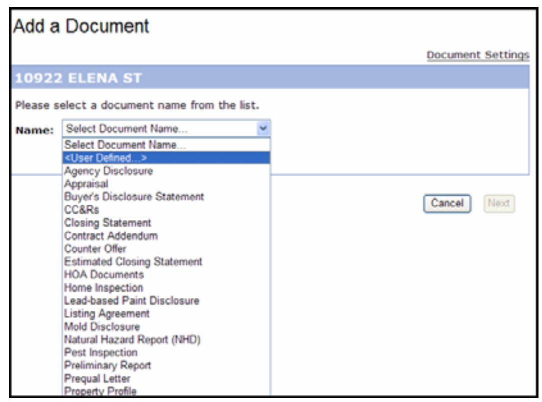
1. Go to the logon page and enter your user name and password then click *Logon.*

2. From the *Home* page click on the subject property.

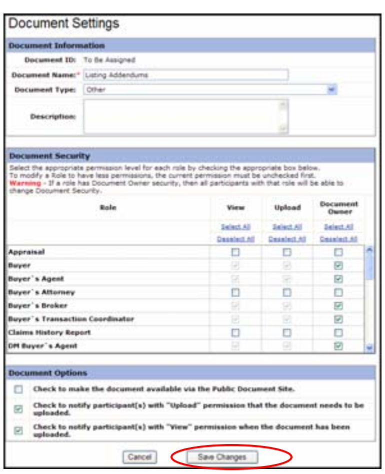
3. To Add a Document, click on the "***Add***" link in the ***Documents*** section.



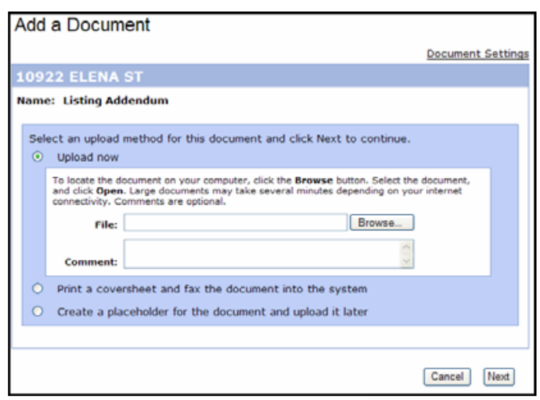
4. Select ***User Defined*** from the Document Name drop-down window. You will be taken to the ***Document Settings*** area to set permissions.



5. Enter the document name, select a document type from the drop down list and set View, Upload, and Own document permissions. Finally, select any applicable document options and click *Save Changes*.



6. You can now Upload your document, create a fax coversheet or create a Document placeholder to upload or fax the document at a later time.



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