



Document Categories

SOP 148

Revision B, 10/30/2020

Approved by: Don Stanton

PURPOSE: Document Categories are used to define and group sets of documents that share common characteristics. The Document Category is a required field when attaching documents to master records in the system

PROCESS STEPS:

1. Navigate to System > Maintenance > Document Categories
2. Click New
3. Enter a Name
4. Ensure the Active box is checked
5. Check the Default box if you want this to be the default document group
6. Click Save
7. Exit

REVISIONS

Rev	Date	Change
I/R	11/17/17	New
A	3/19/18	Formatting
B	10/30/20	Change to v16 Menu names