

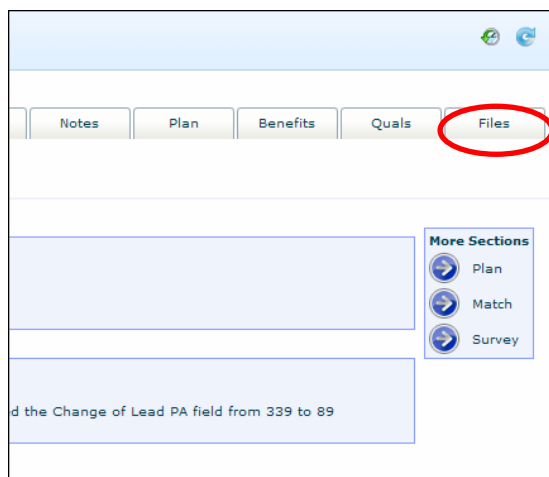
Attaching a file

IO Insight allows you to upload files, which you can attach to the [Files Tab](#) in a Client record. This is a very useful function, which enables you to store documents produced with the client as well as sharing any useful documents with other PAs. The following documents are suggested as useful to upload: action plans, Activity Survey, client CV, EET follow up letters, EST follow up letters, other letters, provider details, school info, VAS team special needs letters and youth involvement.

You can also add a file to an [Organisation](#), which works in exactly the same way as outlined below.

Attaching a file to a client record.

From the client [Summary](#) page, click on the [Files Tab](#) (circled below in red).



To add a new file, click the [+ Add Files](#) button at the top of the page. This will take you to a new page (shown below), where you can enter the [Attachment Details](#) and upload the file

Click on the drop down menu in the [Document Type](#) field to select what type of document you will be uploading. For this mini guide, I will be uploading a Client CV. In the [Document Dated](#) field, click the calendar icon (circled right in red) and select the date which the document was created. In the [Description](#) field, you can enter a brief outline of the document and add any notes or comments that you feel are appropriate.

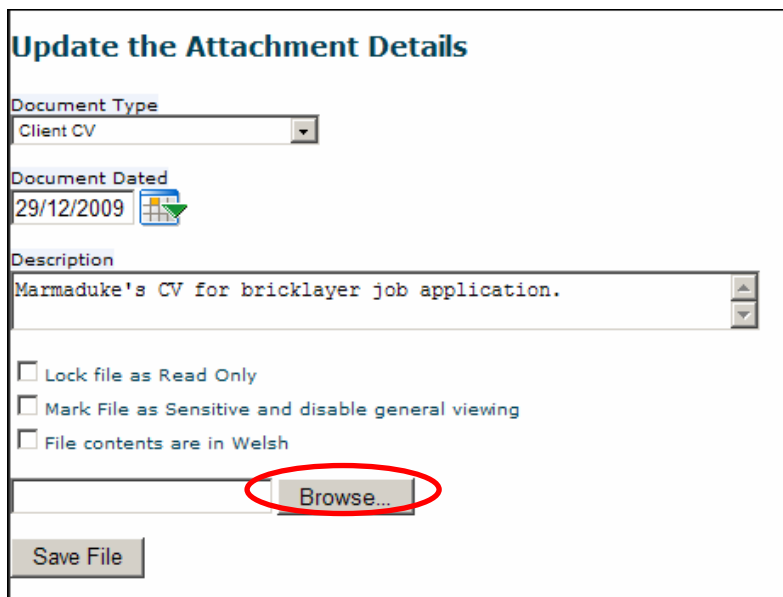
A screenshot of a web form titled 'Update the Attachment Details'. The form has several fields: 'Document Type' with a dropdown menu showing 'Client CV'; 'Document Dated' with a date '29/12/2009' and a calendar icon circled in red; and a 'Description' field with a text area and a dropdown arrow. Below these fields are three checkboxes: 'Lock file as Read Only', 'Mark File as Sensitive and disable general viewing', and 'File contents are in Welsh'. At the bottom, there is a 'Browse...' button, a 'Save File' button, and a text input field.

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Below this are several tick box options: the first is [Lock file as Read Only](#) - if you choose to tick this box, PAs will only be able to view the document and will not be able to edit it at a later date.

The second option is [Mark File as Sensitive and disable general viewing](#) - if you choose to tick this box, only the PA who uploaded the file will be able to view the document.

The third option is [File contents are in Welsh](#) , which should only be ticked if the document is written in Welsh.



Update the Attachment Details

Document Type
Client CV

Document Dated
29/12/2009

Description
Marmaduke's CV for bricklayer job application.

Lock file as Read Only
 Mark File as Sensitive and disable general viewing
 File contents are in Welsh

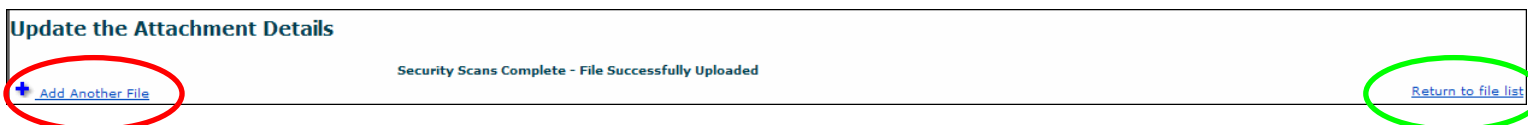
[Browse...](#)

Save File

To select the file that you wish to upload, click [Browse](#) (circled left in red). This will open a new window, from which you can select the file and click [Open](#). This will enter the document file pathway in the field.

Click [Save File](#) to complete the upload and add it to the client's record.

When the file has been uploaded successfully, the following message will appear on your screen.



Update the Attachment Details

Security Scans Complete - File Successfully Uploaded

[Add Another File](#) [Return to file list](#)

You can then either select [Add Another File](#) (circled above in red) to upload another document to the client's file or click [Return to file list](#) (circled above in green) to view all the client's files.

Return to the file list will display files as shown below:



Clicking on the document logo (circled in red), allows you to preview the document.

The pencil and paper icon (circled in blue) allows you to edit the Attachment Details entered previously.

The disc and file icon (circled in green) allows you to download the document to view, edit and save on your computer.

The dustbin icon (circled in pink) allows you to delete the document and Attachment Details from the client record completely.

Remember: you can upload a file to an Organisation in exactly the same way.