

PRMS – Adding a new document to a CAM process

There are two ways to add a document to a CAM case, either by uploading a new document or checking a progress template document back in that has been checked out. Follow the process below for uploading a new document.

Adding a document related to a corrective action against a case

1. Go into the CAM case from the CAM in-basket.
2. Click on the CAMs Documents folder to open it (this will then display the progress reporting template icon).
3. Go to the Documents tab and click on the Add button, then click Add Document.
4. A pop-up box appears, choose this computer, then click next.
5. Then go to the browse button on the right hand side of the pop-up screen (in the middle of the screen) and select the document from your computer. You will know you have correctly done this when the document description is auto-populated next to the browse button.
6. Choose CAM Document from the list and press OK at the bottom of the box.
7. At the very bottom of the drop down box options there will be a drop down called document type – it will have Progress Monitoring Report Template in the drop down. This needs to be changed to the word “Other” by using the drop down box selection.
8. Then select ADD at the bottom right hand side of the screen. It will then say it is adding the document.
9. Document should then be successfully loaded against the case (added document will appear on left hand side of screen in the Documents tab).