

ADDING REFERENCE LINKS

The Reference Links panel allows users to link multiple related form types together for ease in tracking documents that pertain to each other. Once created the link is a dual link for both form types.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

[Create a Reference Link for a New Form Record](#)

[Create a Reference Link to an Existing Record](#)

[Remove a Reference Link](#)

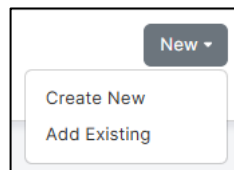
[Related Resources](#)

CREATE A REFERENCE LINK FOR A NEW RECORD

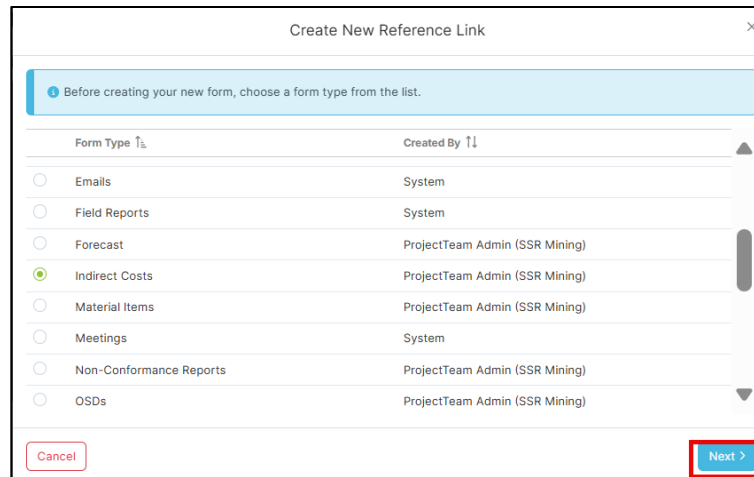
- 1) In the Reference Links panel of a record, click the **New** button.



- 2) Click **Create New**.



- 3) The *Create New Reference Link* modal window opens.



Create New Reference Link

Before creating your new form, choose a form type from the list.

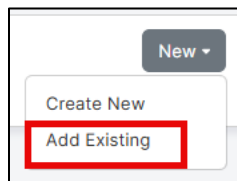
Form Type ↑↓	Created By ↑↓
<input type="radio"/> Emails	System
<input type="radio"/> Field Reports	System
<input type="radio"/> Forecast	ProjectTeam Admin (SSR Mining)
<input checked="" type="radio"/> Indirect Costs	ProjectTeam Admin (SSR Mining)
<input type="radio"/> Material Items	ProjectTeam Admin (SSR Mining)
<input type="radio"/> Meetings	System
<input type="radio"/> Non-Conformance Reports	ProjectTeam Admin (SSR Mining)
<input type="radio"/> OSDs	ProjectTeam Admin (SSR Mining)

Cancel Next >

- 4) Select the form type and click the **Next** button located on the bottom right corner of the screen.
- 5) The form selected in the previous step will open. Complete all *Required fields and any other field necessary and **Save** the record.
- 6) The linked record will be displayed in the Reference Links panel of the new record.

CREATE A REFERENCE LINK TO AN EXISTING RECORD

- 1) In the Reference Links panel of a record, click the New button.
- 2) Click **Add Existing**.

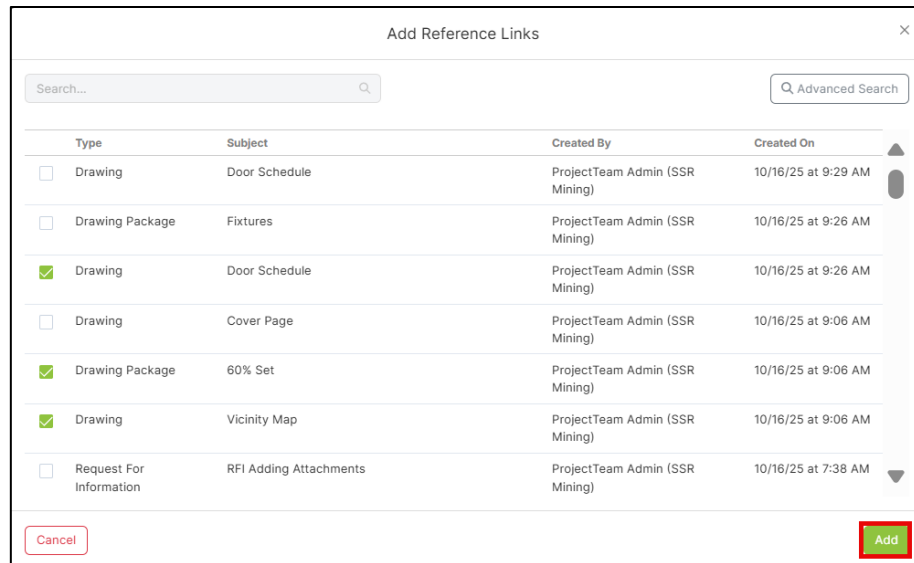


New ▾

Create New

Add Existing

- 3) The *Add Reference Links* modal window will open. Scroll, use the **Search** feature
- 4) Once found, click the checkbox to select the form.



Modal window titled "Add Reference Links" with a search bar and a table of reference links. The table has columns: Type, Subject, Created By, and Created On. The "Add" button is highlighted with a red box.

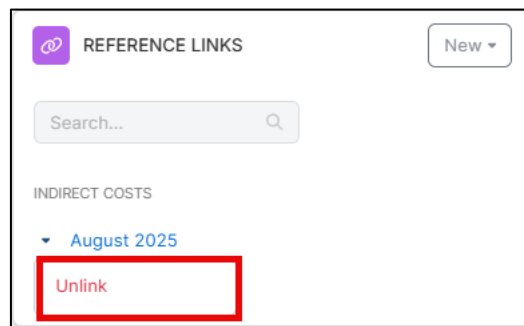
Type	Subject	Created By	Created On
<input type="checkbox"/> Drawing	Door Schedule	ProjectTeam Admin (SSR Mining)	10/16/25 at 9:29 AM
<input type="checkbox"/> Drawing Package	Fixtures	ProjectTeam Admin (SSR Mining)	10/16/25 at 9:26 AM
<input checked="" type="checkbox"/> Drawing	Door Schedule	ProjectTeam Admin (SSR Mining)	10/16/25 at 9:26 AM
<input type="checkbox"/> Drawing	Cover Page	ProjectTeam Admin (SSR Mining)	10/16/25 at 9:06 AM
<input checked="" type="checkbox"/> Drawing Package	60% Set	ProjectTeam Admin (SSR Mining)	10/16/25 at 9:06 AM
<input checked="" type="checkbox"/> Drawing	Vicinity Map	ProjectTeam Admin (SSR Mining)	10/16/25 at 9:06 AM
<input type="checkbox"/> Request For Information	RFI Adding Attachments	ProjectTeam Admin (SSR Mining)	10/16/25 at 7:38 AM

- 5) Click **Add** from the bottom of the modal window.

REMOVE A REFERENCE LINK

A Reference Link between two records can be Unlinked from either of the records. It will be removed from the Reference Link panels of both record.

- 1) Open one of the linked records.
- 2) Click the dropdown arrow on the left side of the Reference Link.



REFERENCE LINKS panel showing a search bar and a list of reference links. The "Unlink" button is highlighted with a red box.

INDIRECT COSTS

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Unlink

- 3) Select **Unlink**.

RELATED RESOURCES

Help Pages

- [Create a Reference Link](#)

