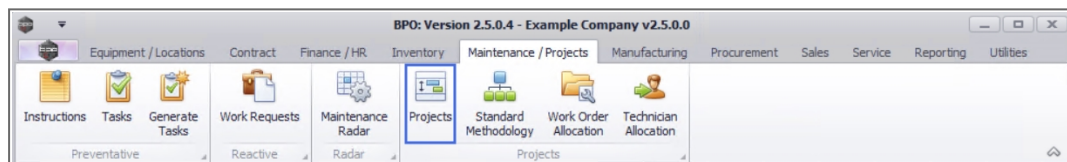# PROJECTS

PROJECTS – DOCUMENTS

The **Documents** tile allows you to link, view or delete digital documents effortlessly. All the project documents are kept in one place by making use of this function.

These documents need to be saved in a <u>shared folder</u> on the server.

Ribbon Access: *Maintenance / Projects > Projects*

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1. The *Project Listing* screen will be displayed.
2. Select the *Site* where the project can be located.
    - The example has *Durban* selected.
3. Select the *Status* for the project.
    - The example has *Open* selected.
4. Click on the *row* of the project you wish to link documents to.
5. Click on the *Documents* tile.
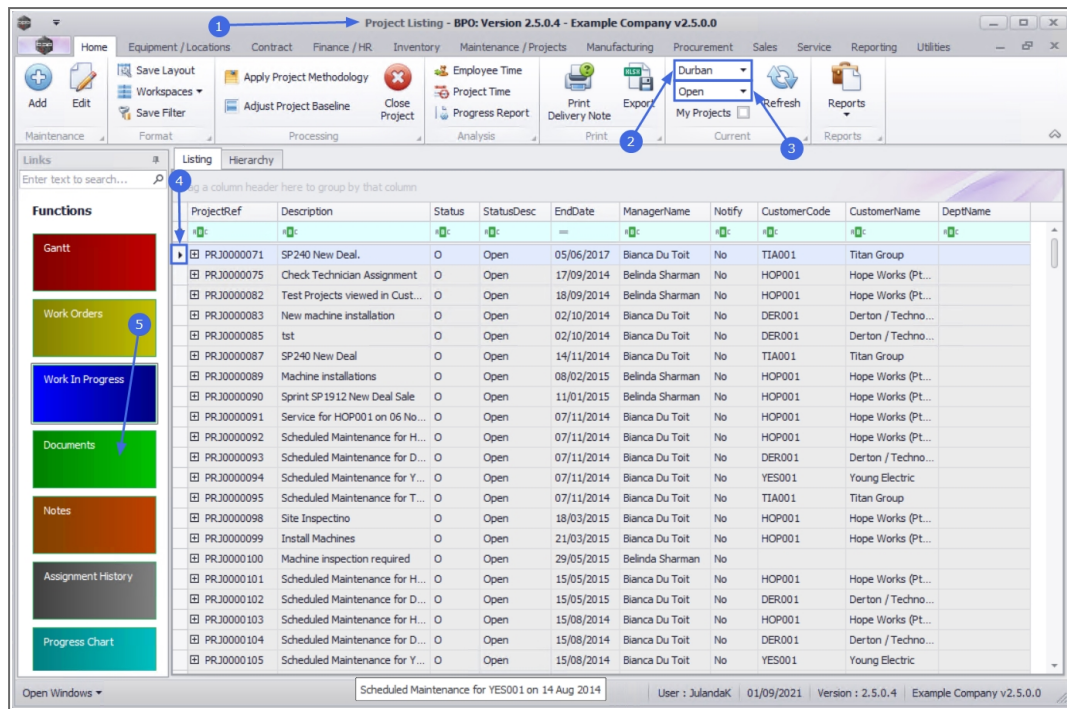
6. The ***Documents for Project : [***project ref number***]*** screen will be displayed.
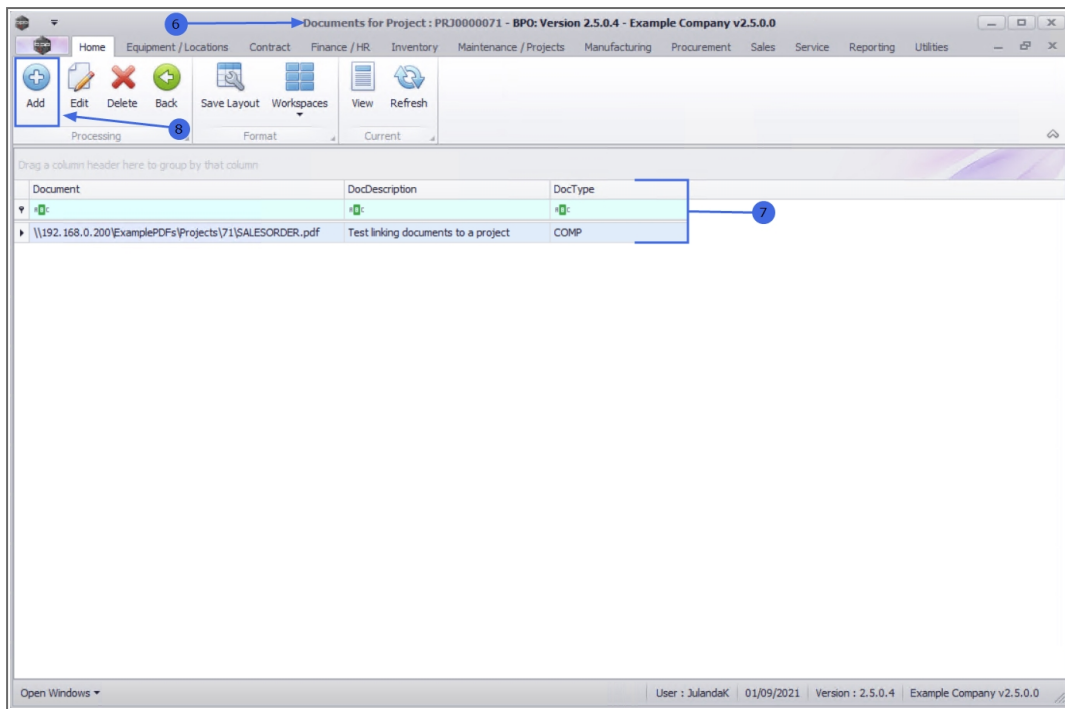
7. A list of documents <u>currently</u> linked to the project will display.

ADD PROJECT DOCUMENTS

8. Click on ***Add***.

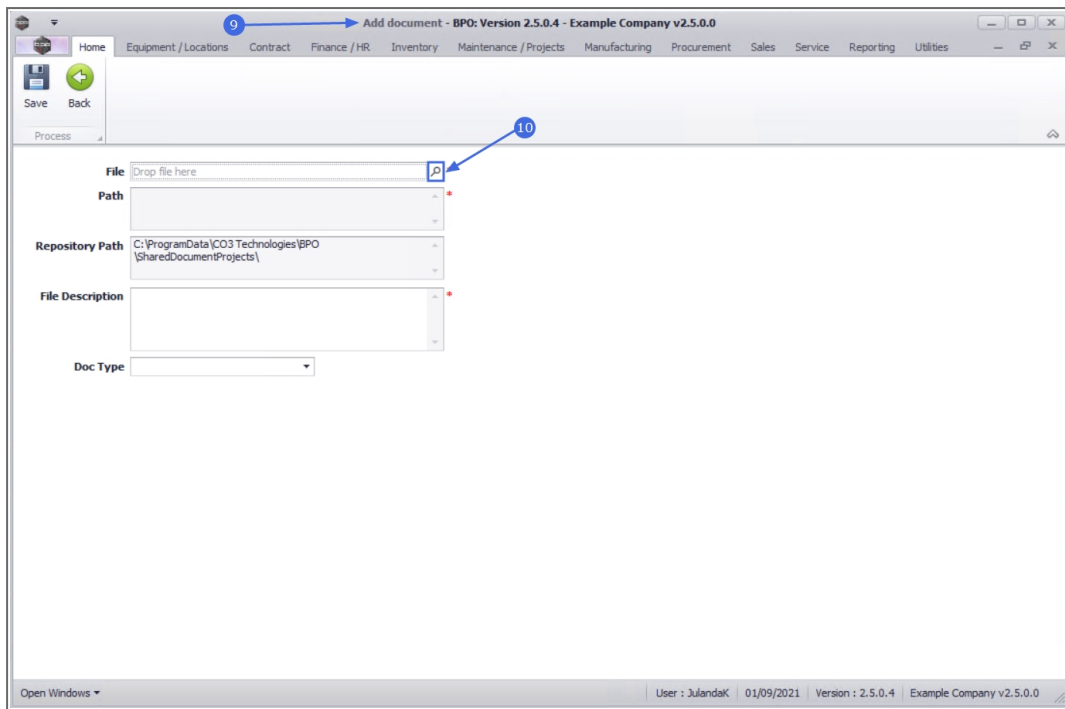> Short cut key: ***Right click*** to display the ***Process*** menu list. Click on ***Add***.

9. The ***Add document*** screen will be displayed.

> ✎ Note that the *Repository Path* field is populated with the path that has been configured in the Company Configuration.

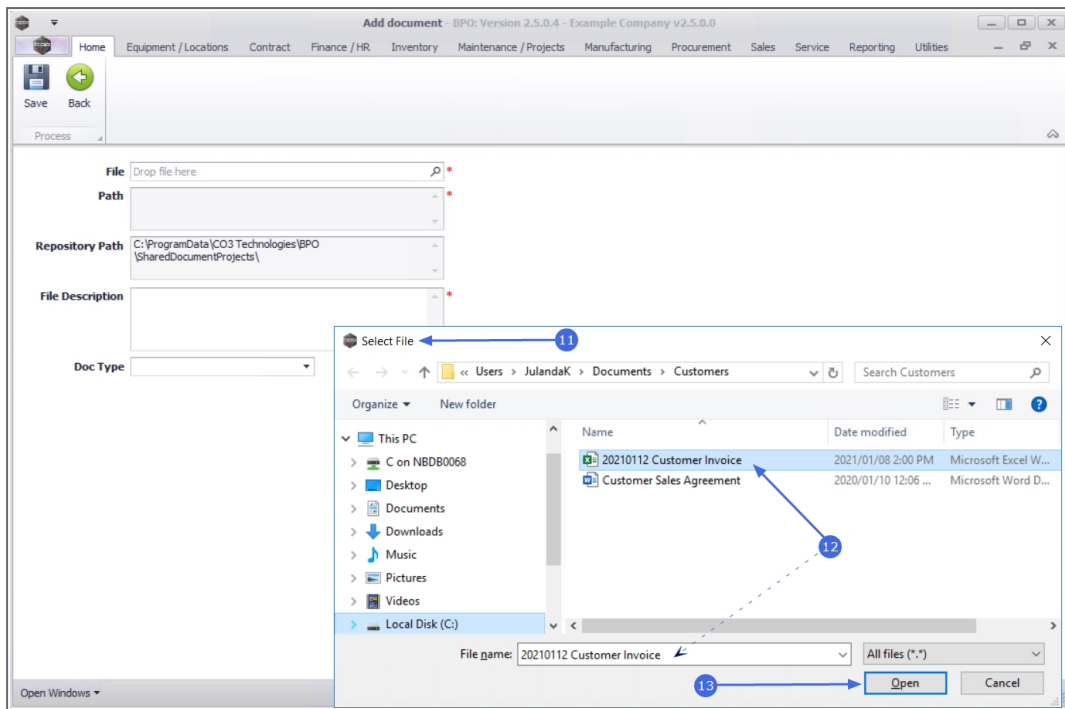10. Click on the ***search*** button in the ***File*** field.

11. From the **Select File** pop up screen,

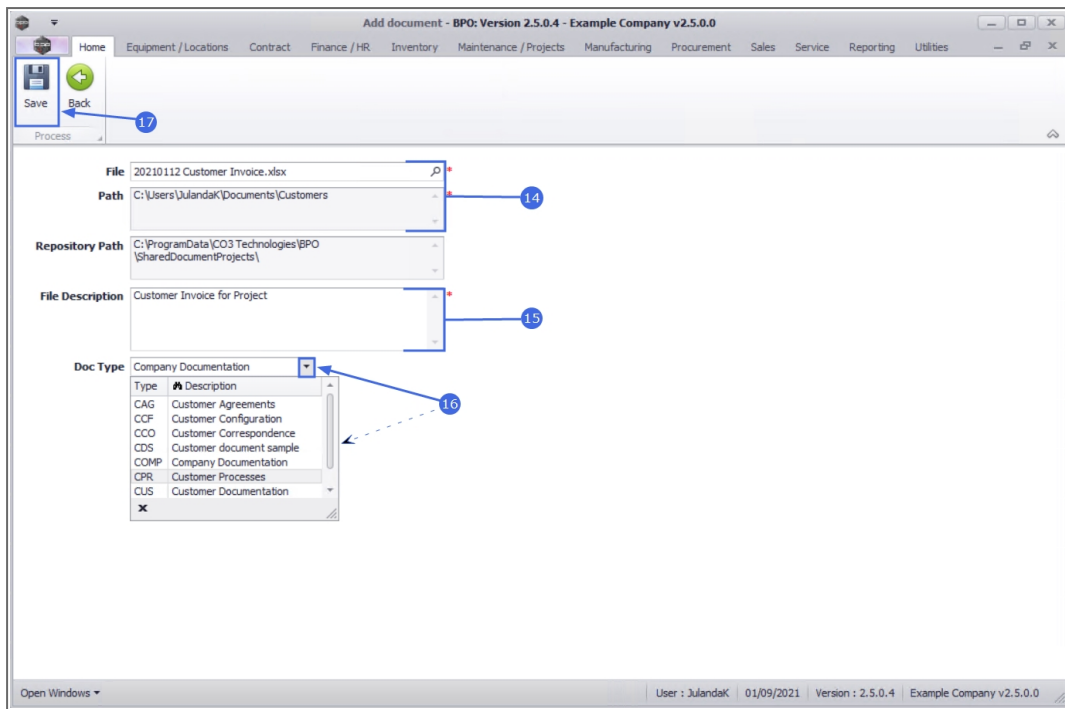12. Locate the **file** on your **server / computer** that you wish to **link**.

> 🖉 Ensure that the document name appear in the *File name:* field by clicking on the document to select it.

13. Click on **Open**.

14. The **File** and **Path** fields will be populated with the details of the selected document.
15. Click in the **File Description** field and type a **description** for the document.
16. Click on the down **arrow** in the **Doc Type** field to select the document type from the drop-down menu.
17. Click on **Save** to save the link.

18. When you receive the *Document Processing* message confirming that;

- *The document has been saved.*

19. Click on *OK*.

> 📝 **Note** that **BPO** does not save the physical document, but a link to where the document has been saved.
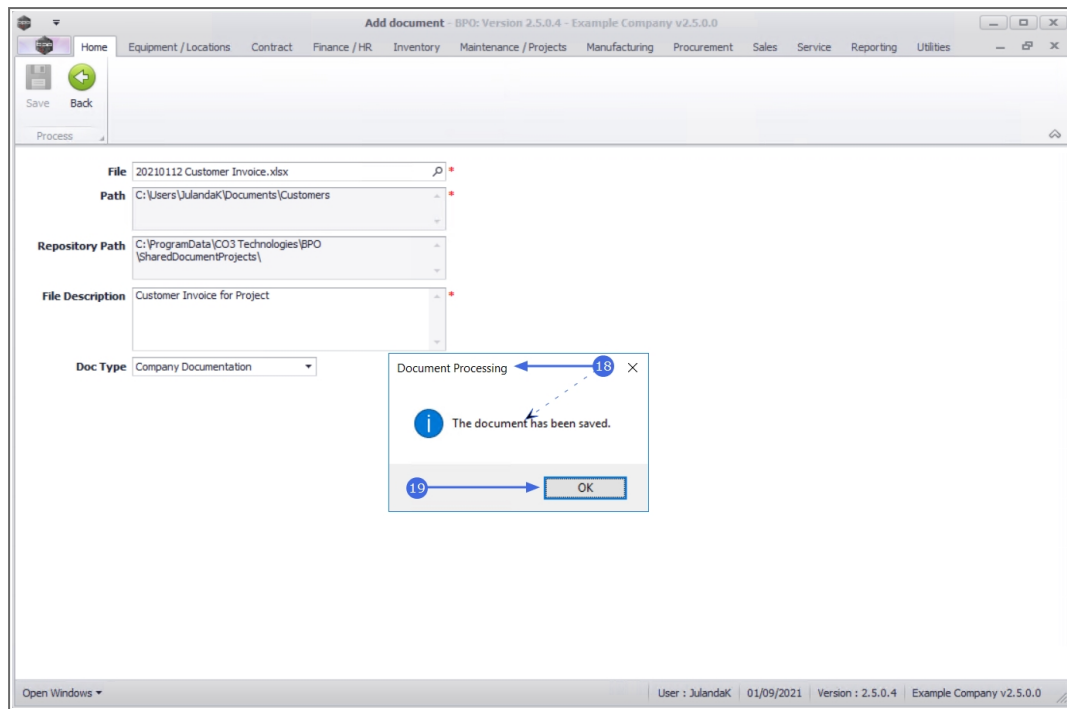
20. The ***Documents for Project*** screen has been updated with the document you have linked.

21. Click on ***Refresh*** to update your screen, if required.

22. Click ***Back*** to return to the ***Project Listing*** Screen.
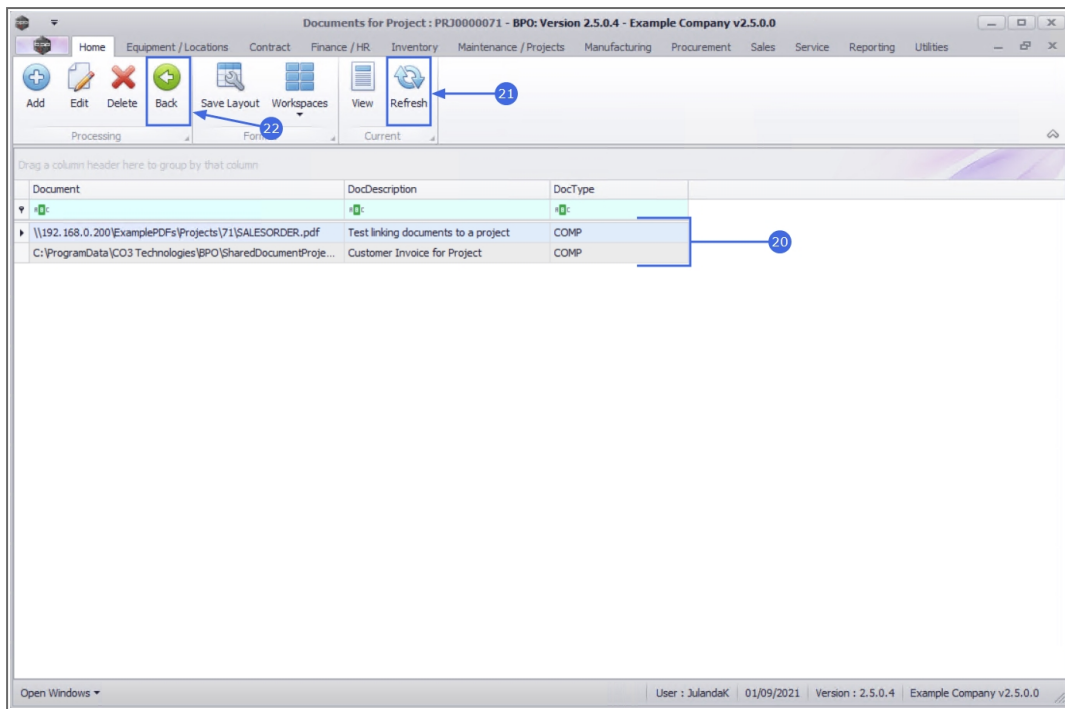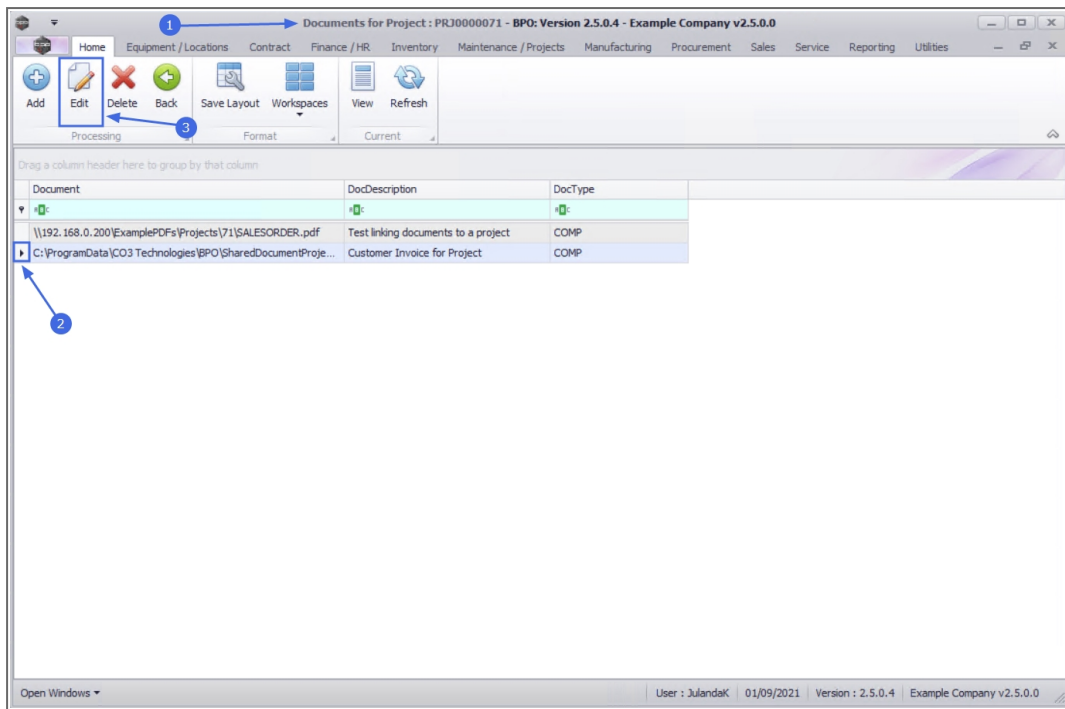
EDIT PROJECT DOCUMENTS

1. From the *Documents* screen,
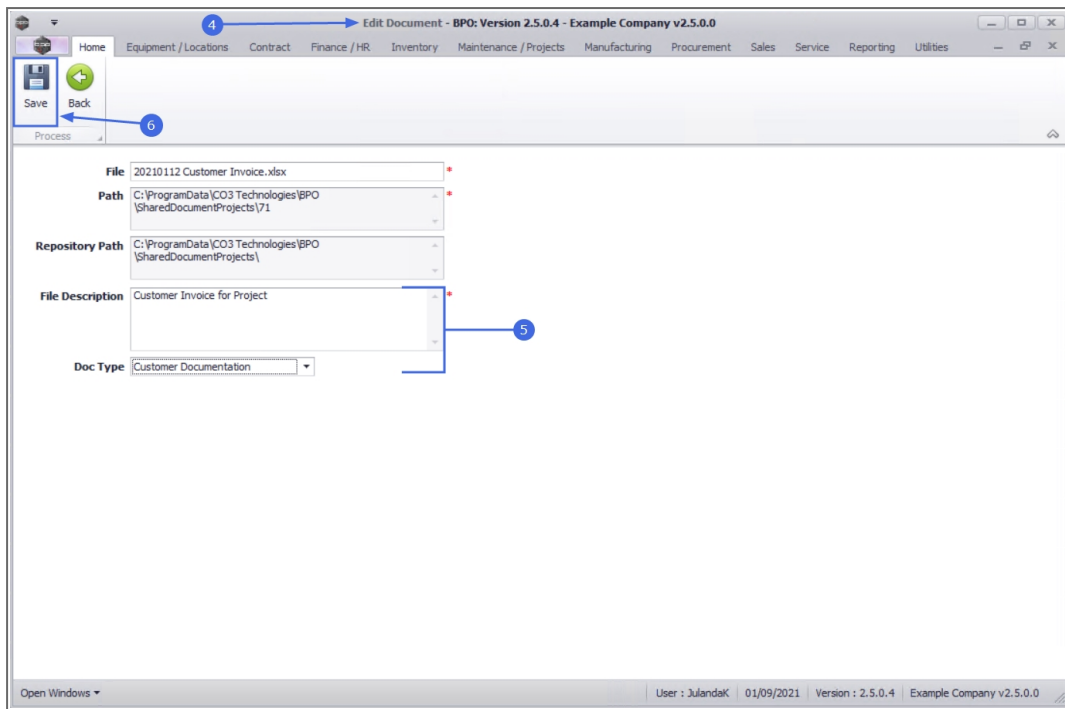2. Click on the *row* of the document you wish to edit.
3. Click on *Edit*.

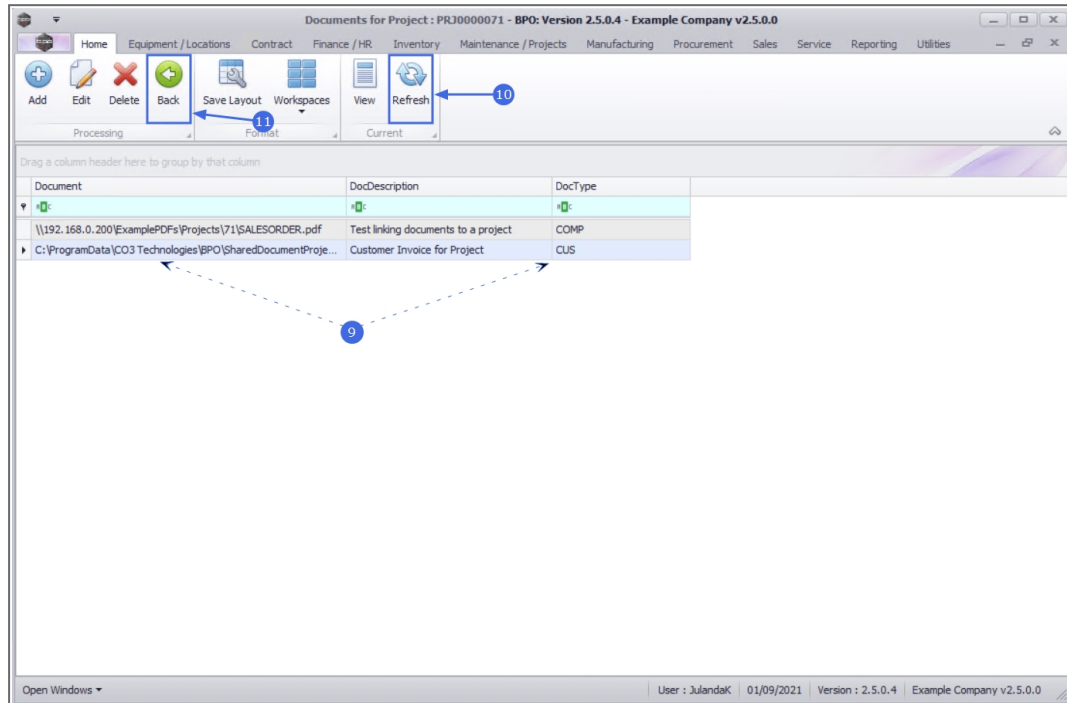> Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.

4. The *Edit Document* screen will be displayed with the selected file information populating the fields.

5. You can make changes to the *File Description* or select an alternative *Document Type*.

6. Click on *Save*.

7. When you receive the *Document Processing* message to confirm;
   - *The document has been saved.*
8. Click on *OK*.
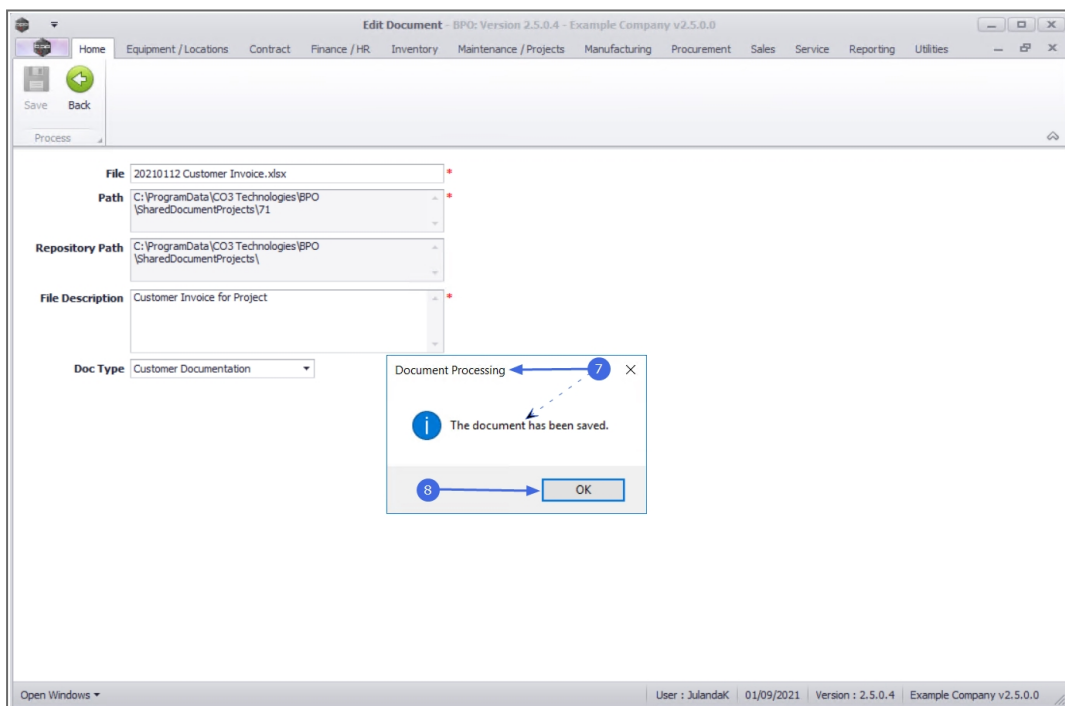
9. The *Documents for Project : [project ref number]* screen has been updated.

10. Click on *Refresh* to update the screen, if required.

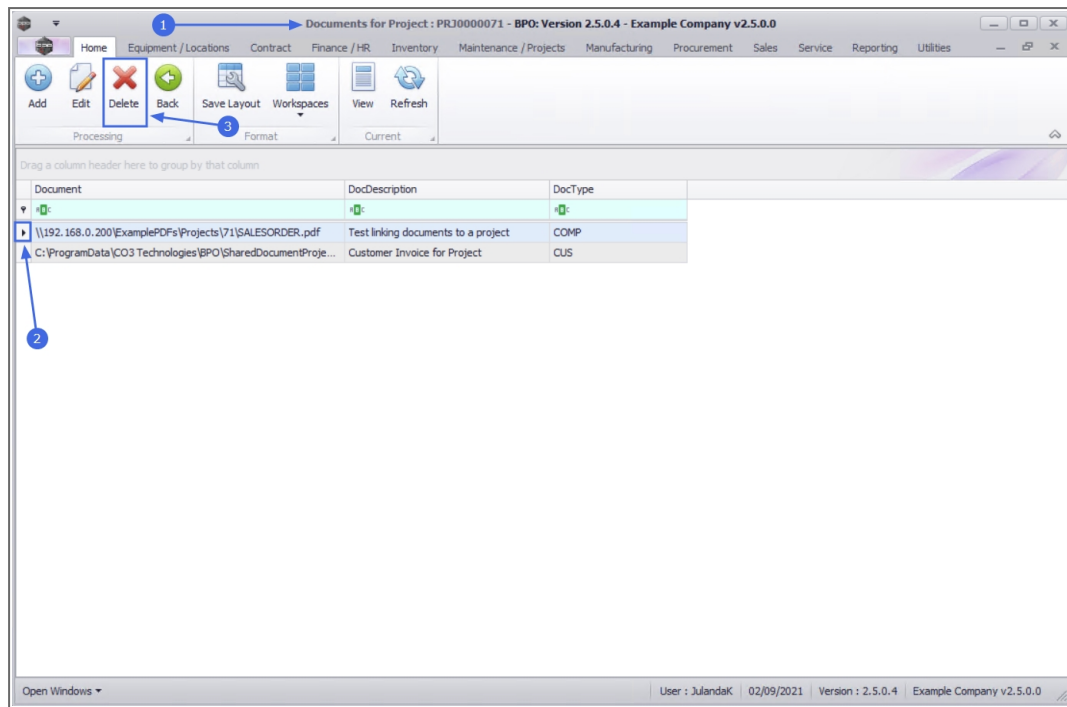11. Click on *Back* to return to the *Project Listing* Screen.
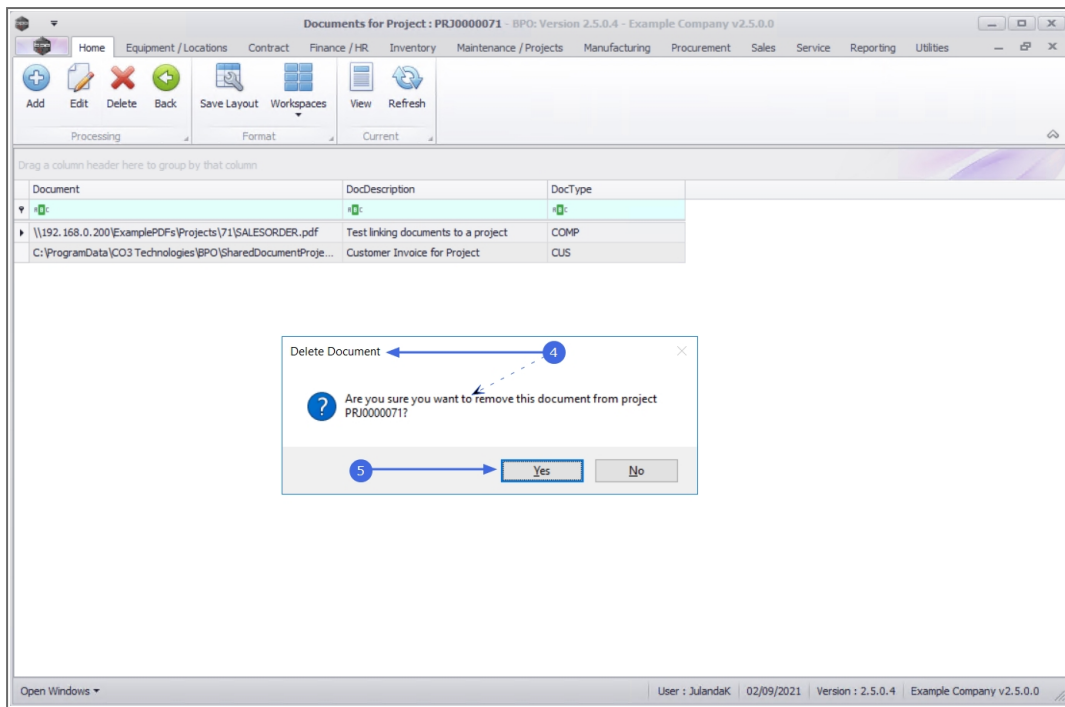

DELETE PROJECT DOCUMENT

1. From the *Documents for Project : [project ref number]* screen,

2. Select the *row* of the document you with to remove from the project.

3. Click on *Delete*.

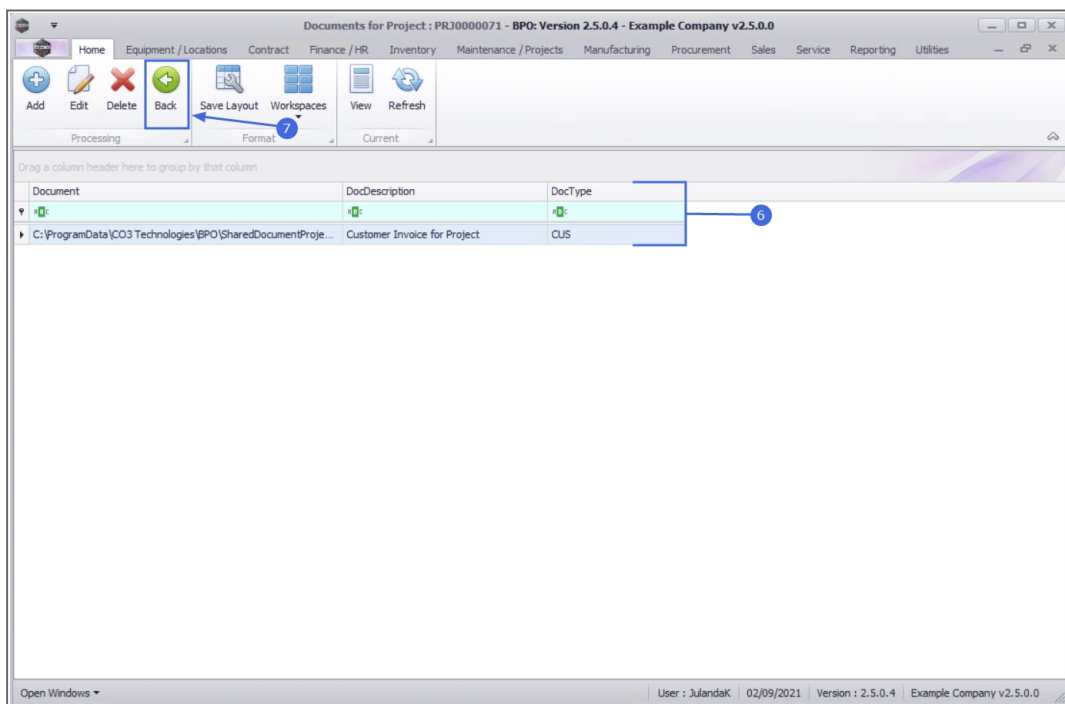Short cut key: *Right click* to display the *Process* menu list. Click on *Delete*.

4. When you receive the **Delete Document** message to confirm;
   - *Are you sure you want to remove this document from project [project ref number]?*
5. Click on **Yes**.
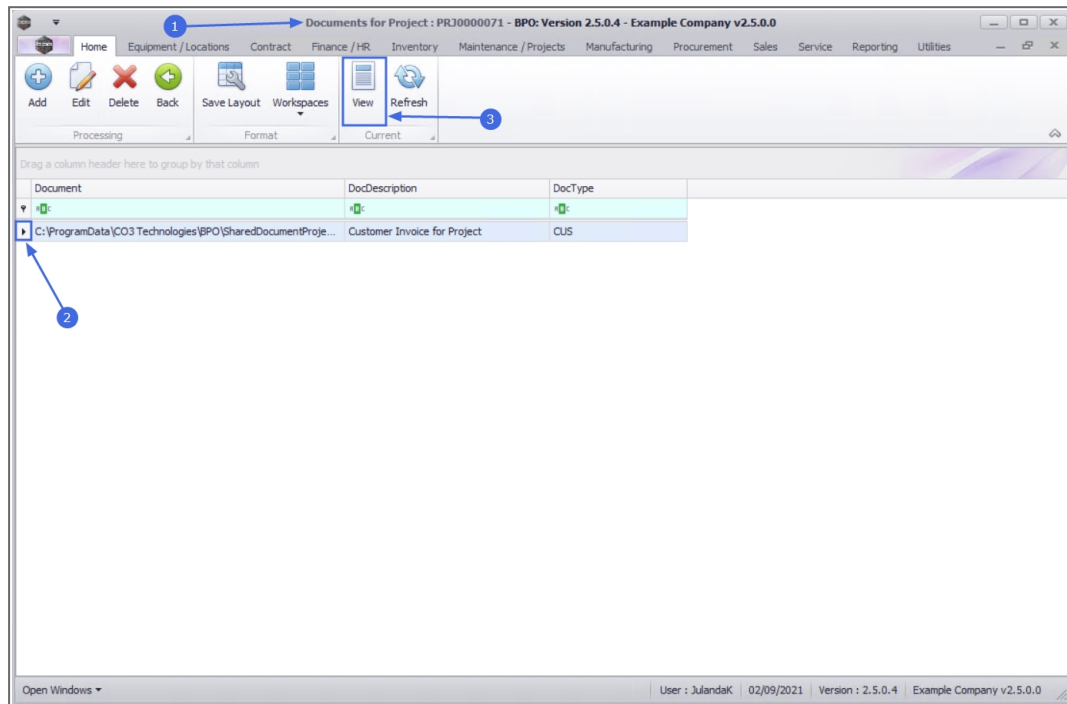
6. The document link has been removed from the *Documents for Project* screen.

7. Click on *Back* to return to the *Project Listing* screen.

VIEW PROJECT DOCUMENTS

1. From the *Documents for Project : [project ref number]* screen,
2. Click on the *row* of the document you wish to view.
3. Click on *View*.

4. The digital document will open in the format the document was been saved in.
   - In this example, an *Excel* document has opened.
5. When you have finished reviewing the document, *close* the document screen that you are in, to return to the *Project Listing* screen.

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