

LOCATIONS

FUNCTIONAL LOCATIONS - DOCUMENTS

The **Documents** tile allows you to Add, Edit, Delete and View digital documents linked to a selected location. For example, a Site Plan document. All your location documents can be kept in one place by making use of this link.

The document should be saved on the **server** to enable all users with the relevant security rights to view the document. If saved and linked from the workstation, another workstation cannot view the document.

Ribbon Access: Equipment / Locations > Functional Locations



1. The *Functional Locations* screen will be displayed.

SELECT THE SITE

- 2. The *Site* filter will be set according to your company configuration.
- 3. You do not need to select a specific site, however if you wish to narrow your filter parameters, you can click on the *drop-down arrow* and select a particular site from the list.
 - For a detailed handling of this topic refer to Site Selection.





SELECT THE LOCATION

1. Select the *row* of the *location* where you wish to link Digital Documents.

MAIN LOCATION

 If the documents are to be linked to a *main* location, select the *row* of that main location. In this example *Upper Highway Area* is a main location.

SUB-LOCATION

If the document is to be linked to a *sub-location*, ensure that you *expand* the main (parent) location to be able to view and select the row of that sub-location. In this example, *Hillcrest* and *Kloof* are sub-loc-



ations of Upper Highway Area.

4. When you have selected the right location, click on the *Documents* tile.

Functional Locations - BPO: Version 2.4.0.11 - Example Company										
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- 1. The *Documents for location: []* screen will open.
- 2. If there are any documents currently linked to the selected location, they will be listed here.

ADD LOCATION DOCUMENT

3. Click on *Add*.





FIND FILE

- 1. The *New Document for Location:* [] screen will open.
- 2. Click on the *search* button in the *File* field and search for the digital document you wish to link.
 - Note: The document should be saved on the *server* to enable all users with the relevant security rights to view the document. If saved and linked from the workstation, another workstation cannot view the document.



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SELECT FILE

- 1. From the *Select File* pop up screen,
- 2. Find 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.
- 3. Click on *Open*.



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DOCUMENT DETAILS

- 1. The *File* and *Path* and *Repository Path* fields will now auto populate.
- 2. File Description: type in a description for the document you are linking.
- Click on the drop-down *arrow* in the *Doc Type* field and select a document type from the list.

SAVE DOCUMENT

4. Click on Save





1. A *Document Processing* message box will pop up advising the following:

• The document: [] for location [] has been saved.

2. Click on OK.





VIEW LINKED DOCUMENT

- You can now view the added document in the Documents for location: [] screen.
- Click on *Back* or *Close* the screen to return to the *Functional Locations* screen.





Related Topics

- Introduction to Functional Locations
- Add a New Functional Location
- Edit a Functional Location
- Delete a Functional Location
- Location Technical Specifications
- Location Additional Data
- Location Work Order History
- Location Failure Analysis
- Location Warranty
- Location Maintenance Methodology
- Location Add a New Location Contract

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