

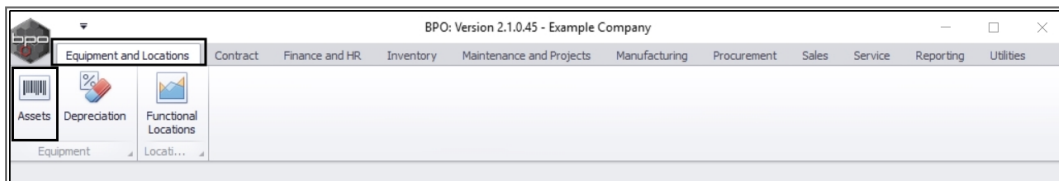
EQUIPMENT

ASSETS – VIEW, ADD, EDIT, DELETE DOCUMENTS

Digital documents (for example, documents scanned to PDF) can be linked in various places in BPO.

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 and Locations* > *Assets*



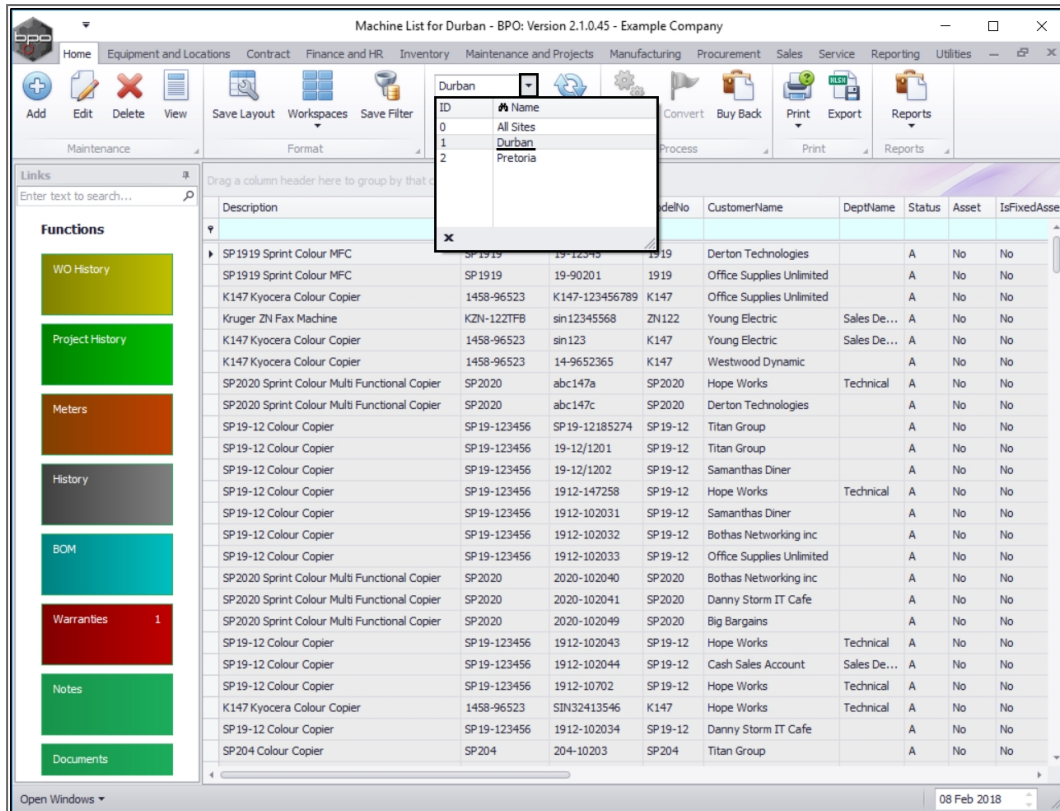
- The **Machine List for []** screen will be displayed.
- The data grid will list all the assets currently on the system.

THE SITE AND TYPE FILTERS

- Depending on your company configuration, you may need to click on the **drop-down arrow** and select the correct **Site** from the list, before proceeding.

Note: Refer to [Site Selection](#) for more information

- In this example, **Durban** is selected.



This screen will open by default in the **All** Type. You do not need to change this Type to view or add asset documents. If this screen is already open in another Type for example, '**Internal Assets**', then click on the **drop-down arrow** and select from the list, the right Type that contains the asset you wish to work with.

SELECT THE ASSET

- Select the **row** of the **asset** where you wish to **view** the linked digital document(s).
- Click on the **Documents** tile.

Machine List for Durban - BPO: Version 2.10.45 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Durban All Refresh Revalue Convert Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links Enter text to search...

Meters History BOM Warranties 1 Notes Documents Maintenance Depreciation

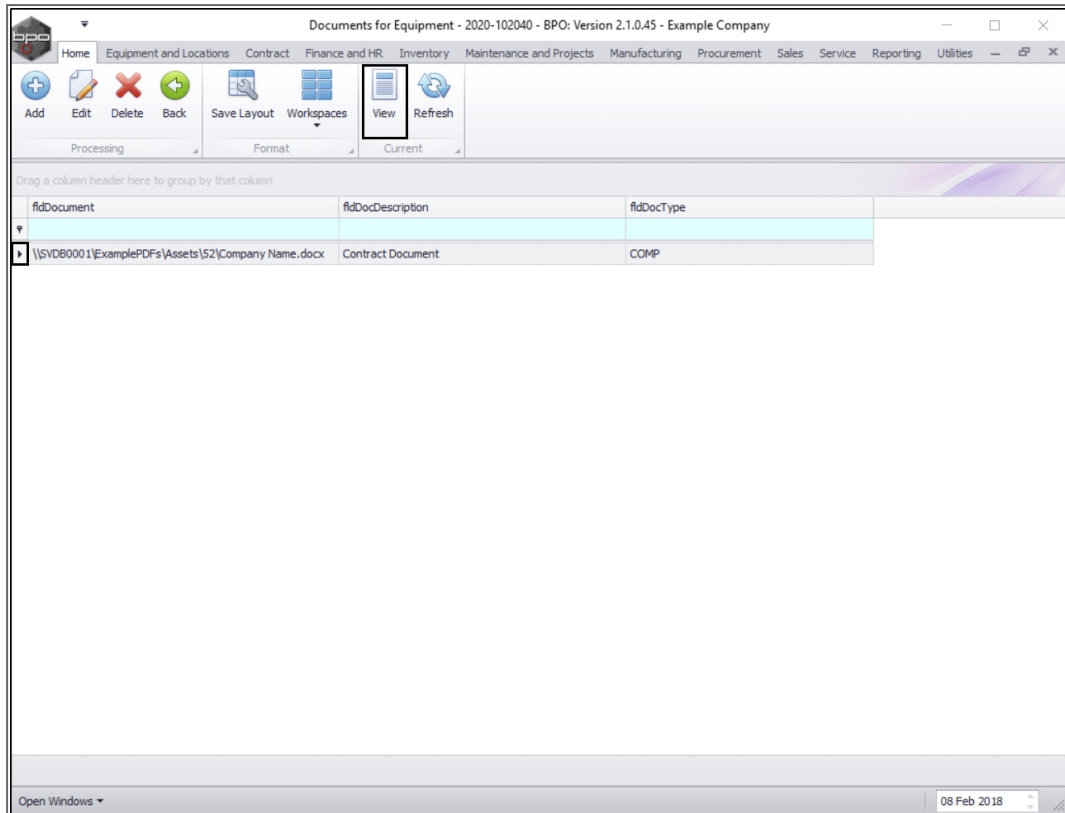
Drag a column header here to group by that column

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	Asset	IsFixedAsset
SP1919 Sprint Colour MFC	SP1919	19-12345	1919	Derton Technologies		A	No	No
SP1919 Sprint Colour MFC	SP1919	19-90201	1919	Office Supplies Unlimited		A	No	No
K147 Kyocera Colour Copier	1458-96523	K147-123456789	K147	Office Supplies Unlimited		A	No	No
Kruger ZN Fax Machine	KZN-122TFB	sin12345568	ZN122	Young Electric	Sales De...	A	No	No
K147 Kyocera Colour Copier	1458-96523	sin123	K147	Young Electric	Sales De...	A	No	No
K147 Kyocera Colour Copier	1458-96523	14-9652365	K147	Westwood Dynamic		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147a	SP2020	Hope Works	Technical	A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147c	SP2020	Derton Technologies		A	No	No
SP19-12 Colour Copier	SP19-123456	SP19-12185274	SP19-12	Titan Group		A	No	No
SP19-12 Colour Copier	SP19-123456	19-12/1201	SP19-12	Titan Group		A	No	No
SP19-12 Colour Copier	SP19-123456	19-12/1202	SP19-12	Samanthas Diner		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-147258	SP19-12	Hope Works	Technical	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102031	SP19-12	Samanthas Diner		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102032	SP19-12	Bothas Networking inc		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102033	SP19-12	Office Supplies Unlimited		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102040	SP2020	Bothas Networking inc		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041	SP2020	Danny Storm IT Cafe		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102049	SP2020	Big Bargains		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102043	SP19-12	Hope Works	Technical	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102044	SP19-12	Cash Sales Account	Sales De...	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-10702	SP19-12	Hope Works	Technical	A	No	No
K147 Kyocera Colour Copier	1458-96523	SIN32413546	K147	Hope Works	Technical	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102034	SP19-12	Danny Storm IT Cafe		A	No	No
SP204 Colour Copier	SP204	204-10203	SP204	Titan Group		A	No	No

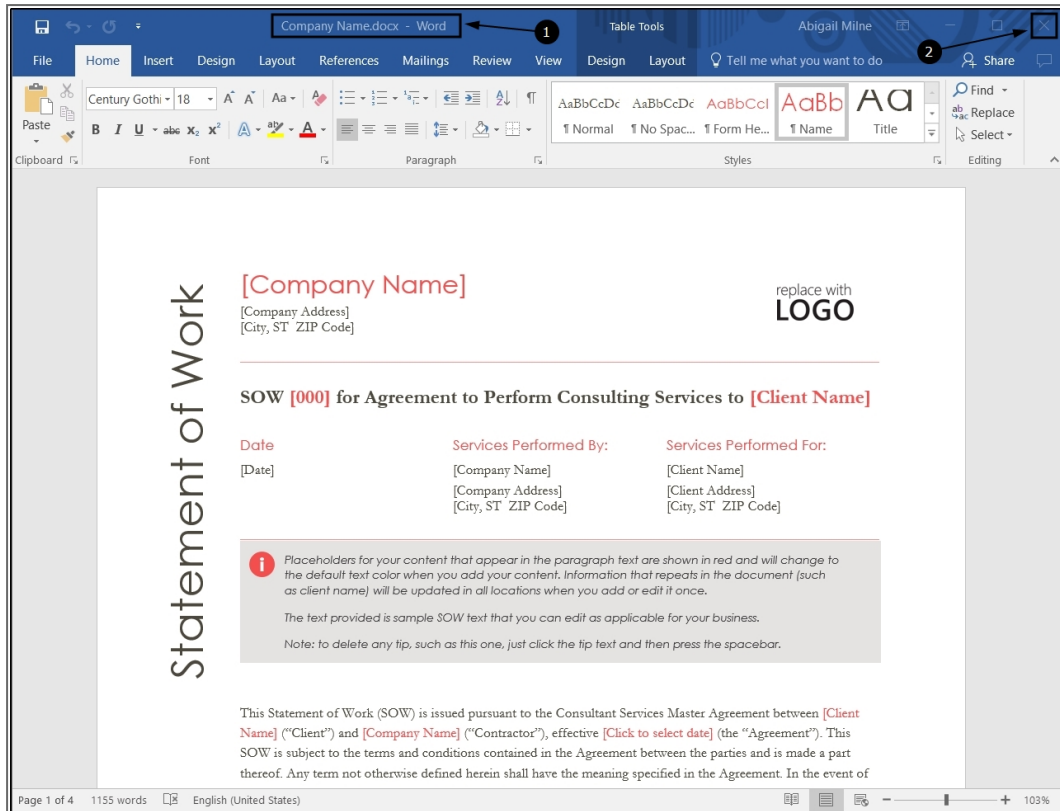
Open Windows 08 Feb 2018

VIEW LINKED DOCUMENT CONTENTS

- The **Documents for Equipment []** screen will open.
- Here you can view a list of the documents currently linked to the selected asset.
- Select the **row** of the **document** where you wish to view the contents.
- Click on **View**.



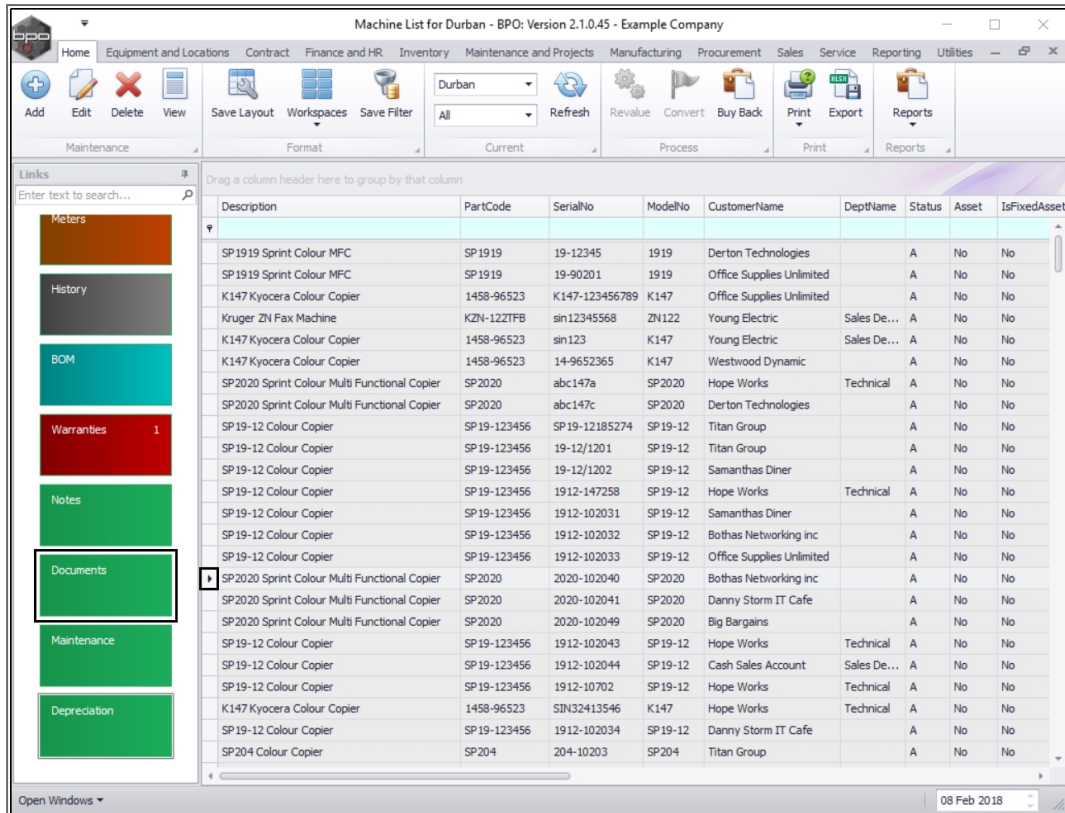
1. The document will open with the relevant program, for example, a **PDF** will open in **Adobe Reader**, a **Word** document will open the **Microsoft Word** application (if installed on your PC).
2. Close this screen to return to the **Documents for Equipment []** screen.



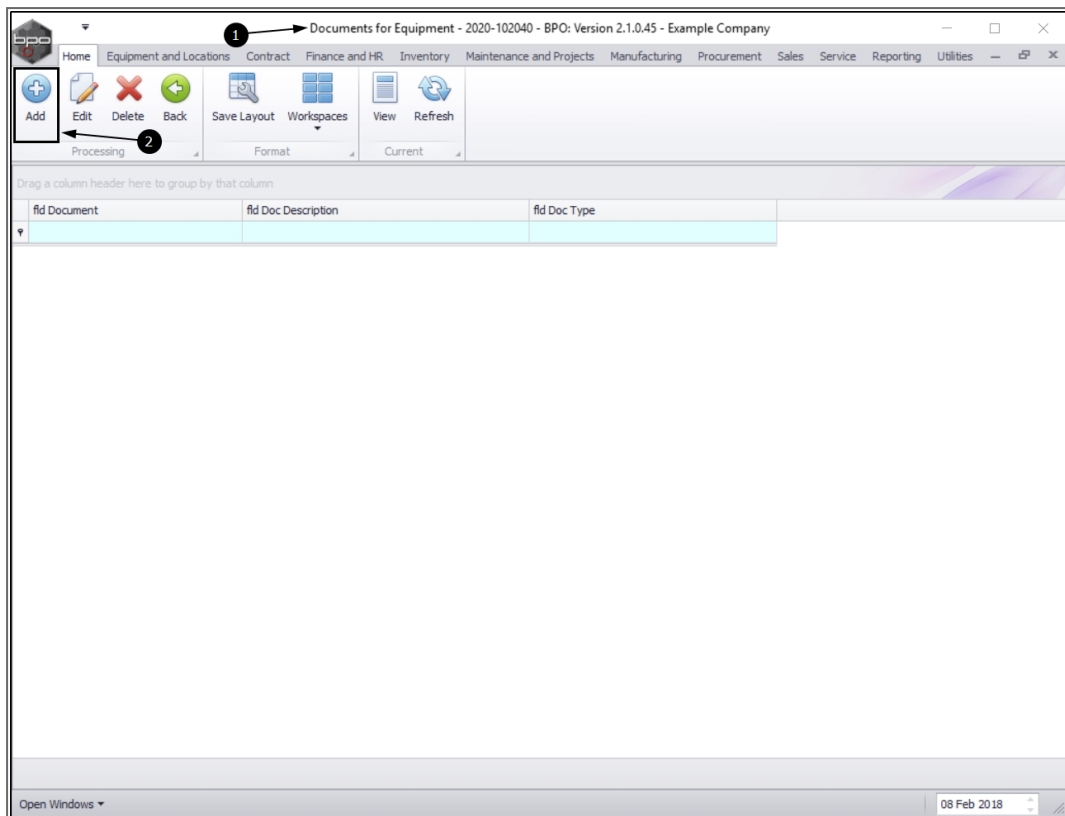
ADD A DOCUMENT

SELECT ASSET

- In the **Machine List for []** screen, select the **row** of the **asset** where you wish to **add** a document.
- Click on the **Documents** tile.

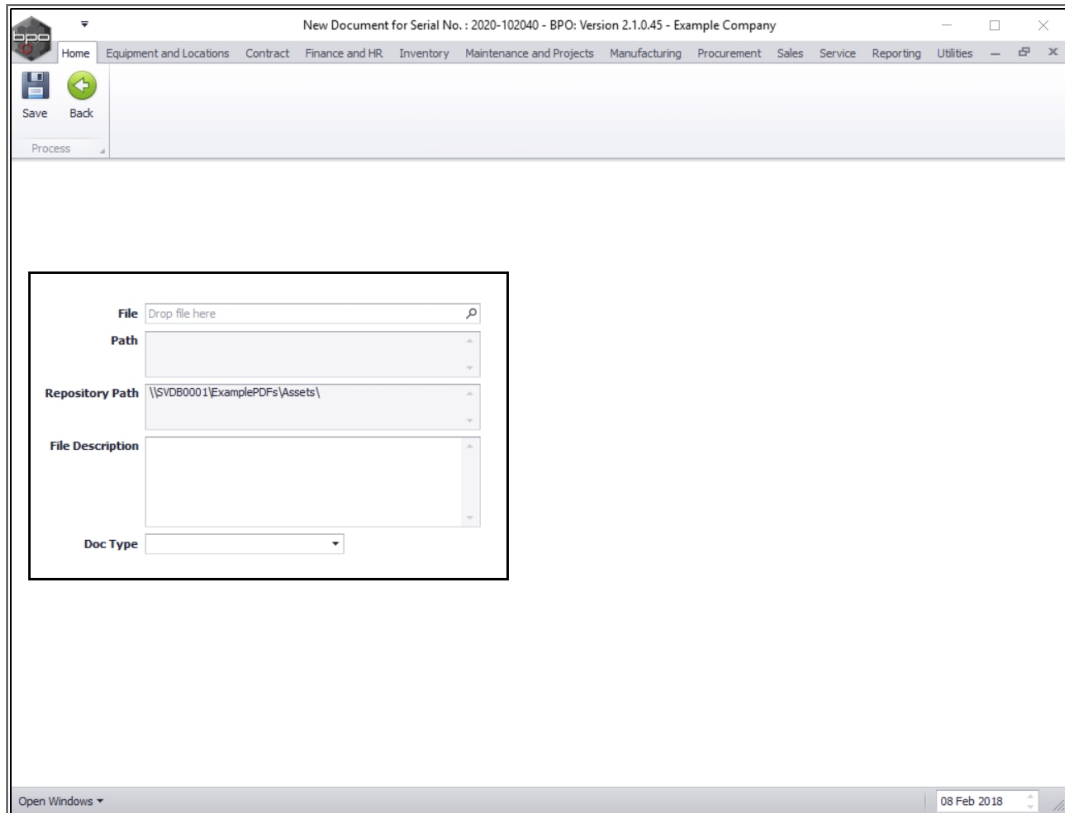


1. The **Documents for Equipment - []** screen will open.
2. Click on **Add**.



ADD DOCUMENT FILE AND PATH DETAILS

- **File:** Click on the **search** button and browse your computer for the file you wish to attach.
- **Path:** This will auto populate according to the selected file.
- **Repository Path:** This will be auto populated with the **configured location - Document Repository Path**.
- **File Description:** Type in the **title** or a **description** for this document.
- **Doc Type:** Click on the **drop-down arrow** and select the appropriate Document Type from the list.



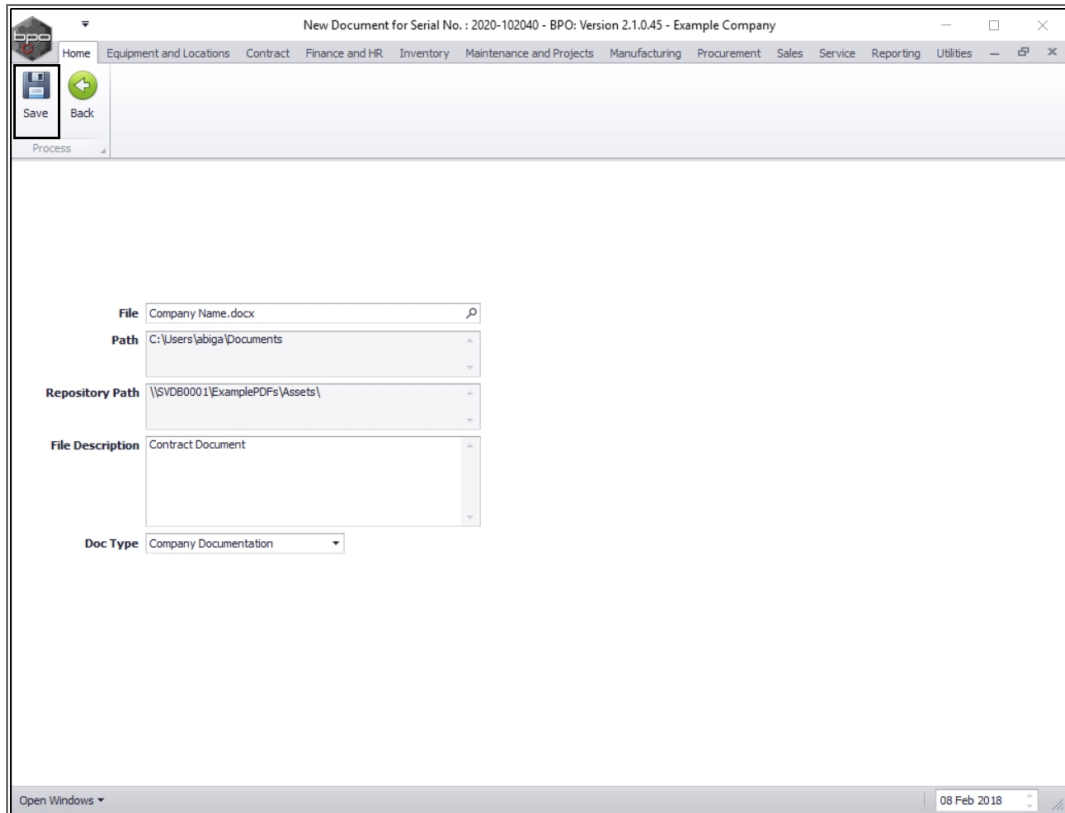
The screenshot shows a web application window titled "New Document for Serial No. : 2020-102040 - BPO: Version 2.1.0.45 - Example Company". The window has a top navigation bar with tabs: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with "Save" and "Back" buttons, and a "Process" button. The main content area contains a form with the following fields:

- File:** A text input field with the placeholder "Drop file here" and a file upload icon.
- Path:** A text input field.
- Repository Path:** A text input field with the value "\\SVD80001\\ExamplePDFs\\Assets\".
- File Description:** A large text area.
- Doc Type:** A dropdown menu.

At the bottom of the window, there is a status bar with "Open Windows" and a date "08 Feb 2018".

SAVE ADDED DOCUMENT

- When you have finished linking the document details, click on **Save**.



New Document for Serial No. : 2020-102040 - BPO: Version 2.1.0.45 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

File: Company Name.docx

Path: C:\Users\abiga\Documents

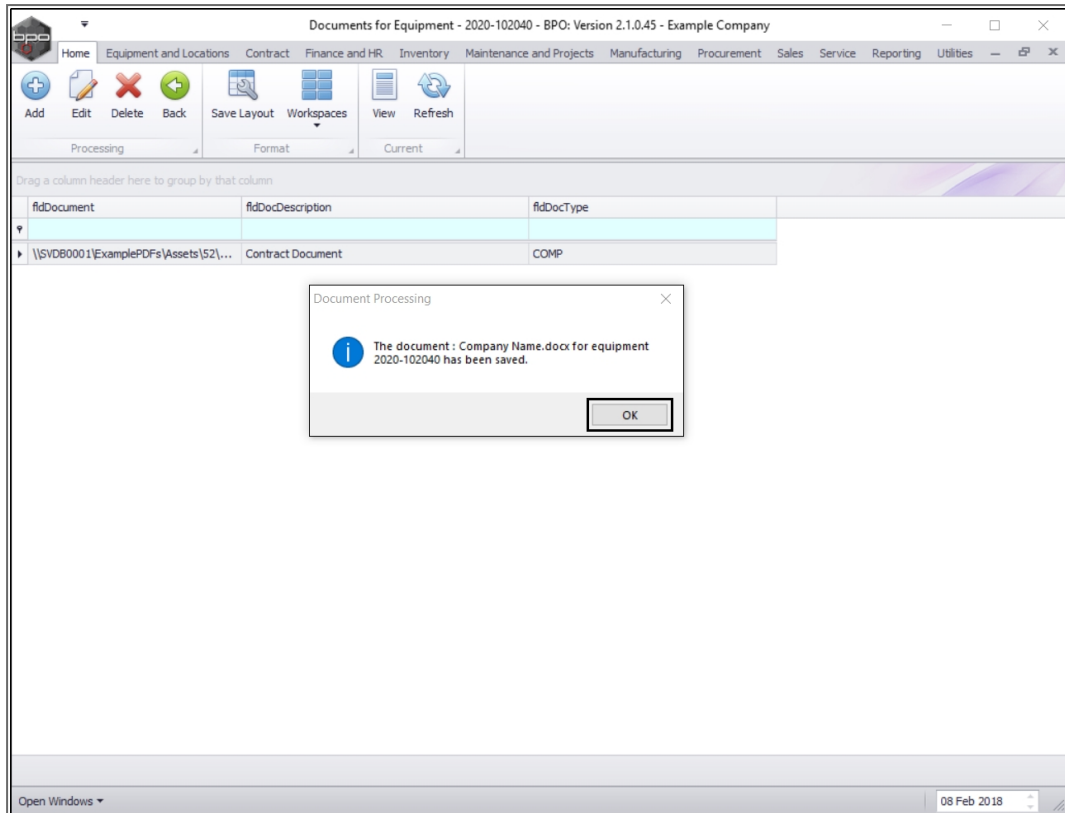
Repository Path: \\SVD60001\ExamplePDFs\Assets

File Description: Contract Document

Doc Type: Company Documentation

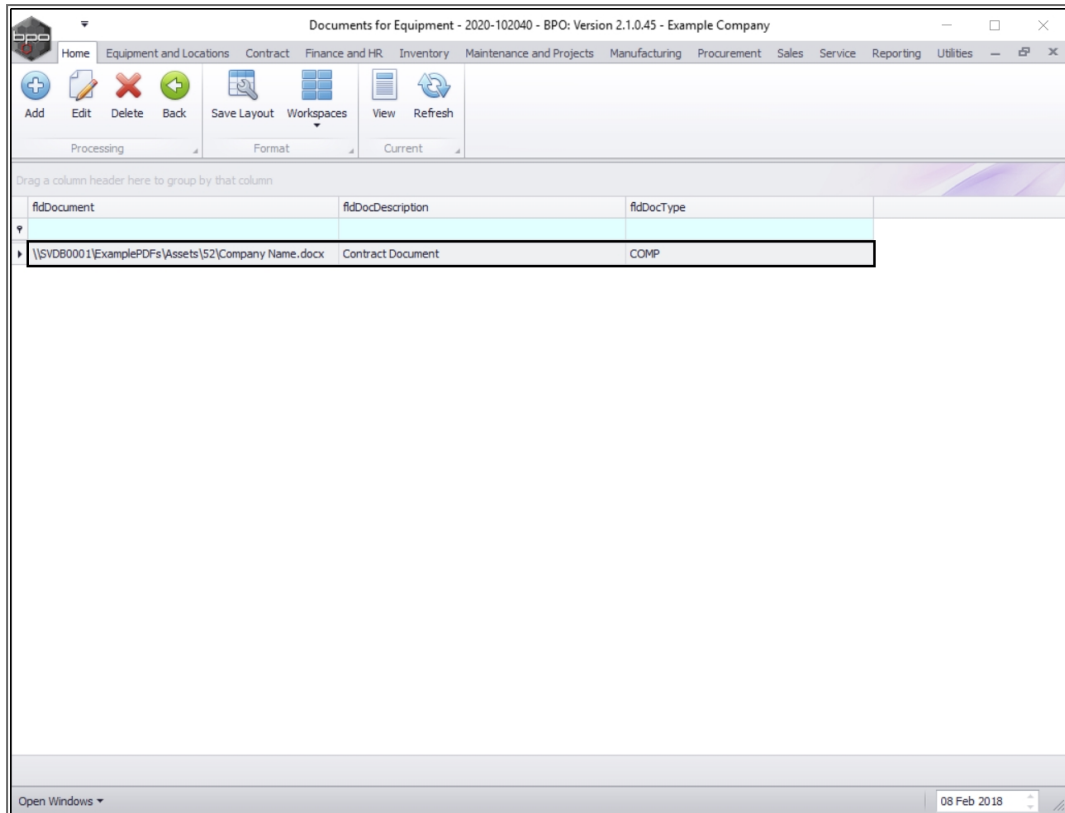
Open Windows 08 Feb 2018

- You will return to the **Documents for Equipment - []** screen.
- A **Document Processing** message box will pop up informing you:
 - *The document: [] for equipment [] has been saved.*
- Click on **OK**.



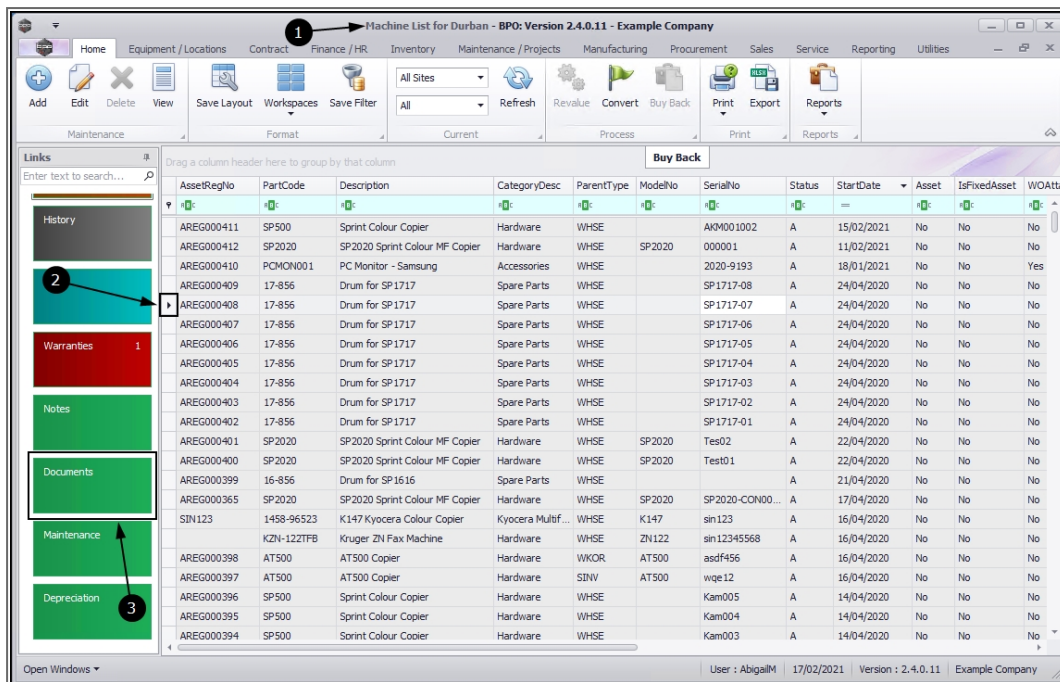
VIEW ADDED DOCUMENT

- You can now **view** the linked document detail listed in this screen.

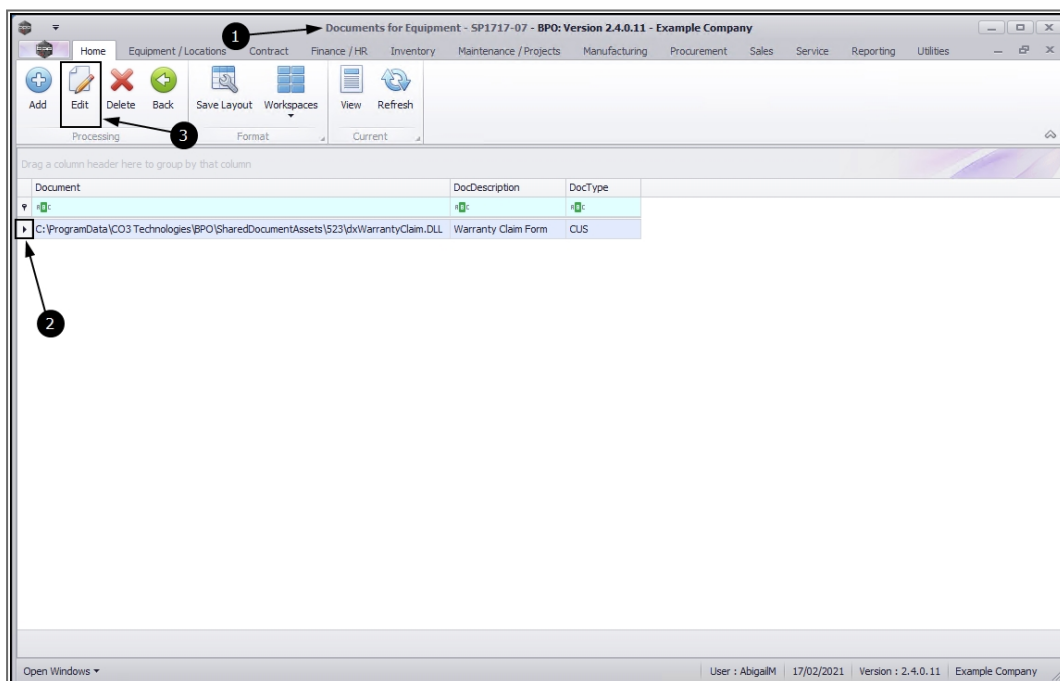


EDIT A DOCUMENT

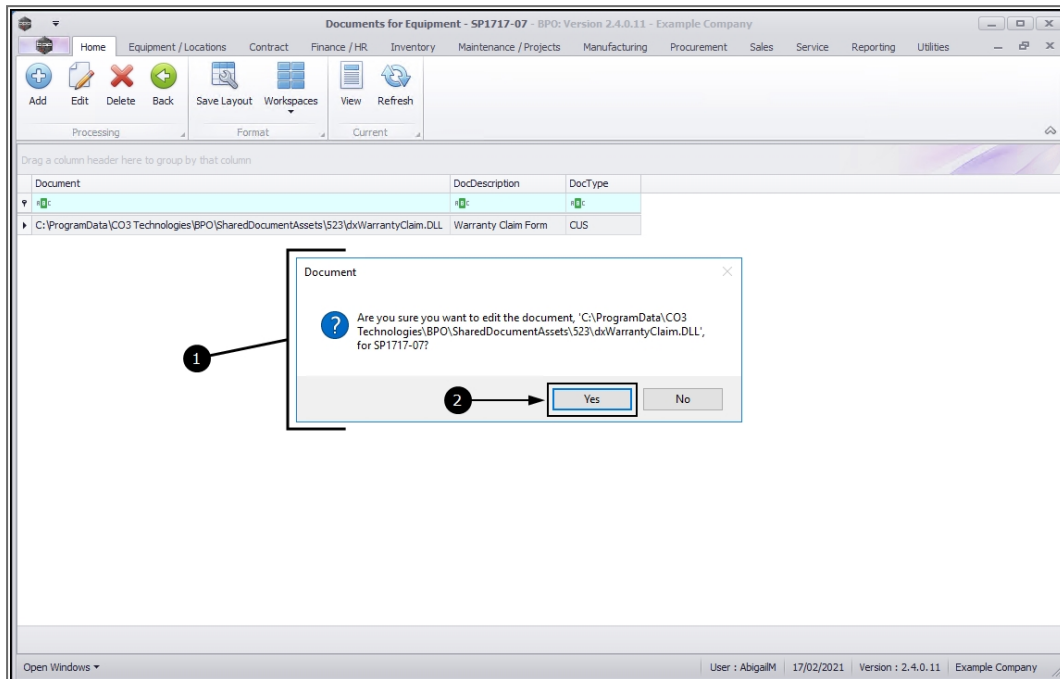
1. In the **Machine List for []** screen,
2. Select the **row** of the **asset** where you wish to **edit** a document.
3. Click on the **Documents** tile.



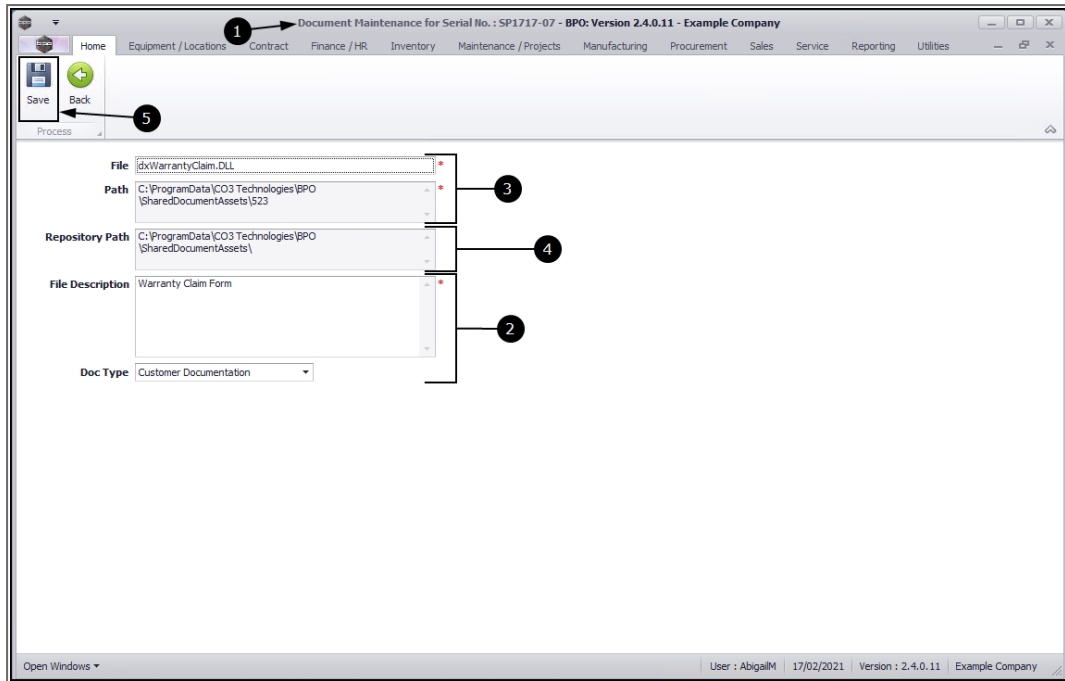
1. The **Documents for Equipment - []** screen will open.
2. If there is more than one linked document in the list, select the **row** of the document that you wish to edit.
3. Click on **Edit**.



1. A **Document** message box will pop up:
 - Are you sure you want to edit the document, '[' for [']?
2. Click on **Yes**.



1. The **Document Maintenance for Serial No.: []** screen will open.
2. Only the **File Description** and **Doc Type** fields are editable from this screen.
3. If you need to make changes to the **File** and **Path** fields, you will need to delete this document link from the **Documents for Equipment - []** screen as explained above and add the document with the correct file and the correct path.
4. If required, the **Repository Path** will need to be edited in the Con-
figurator.
5. Make the required changes to the relevant fields and click on **Save**.



Document Maintenance for Serial No. : SP1717-07 - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

File: dx\WarrantyClaim.DLL

Path: C:\ProgramData\CO3 Technologies\BPO\SharedDocumentAssets\523

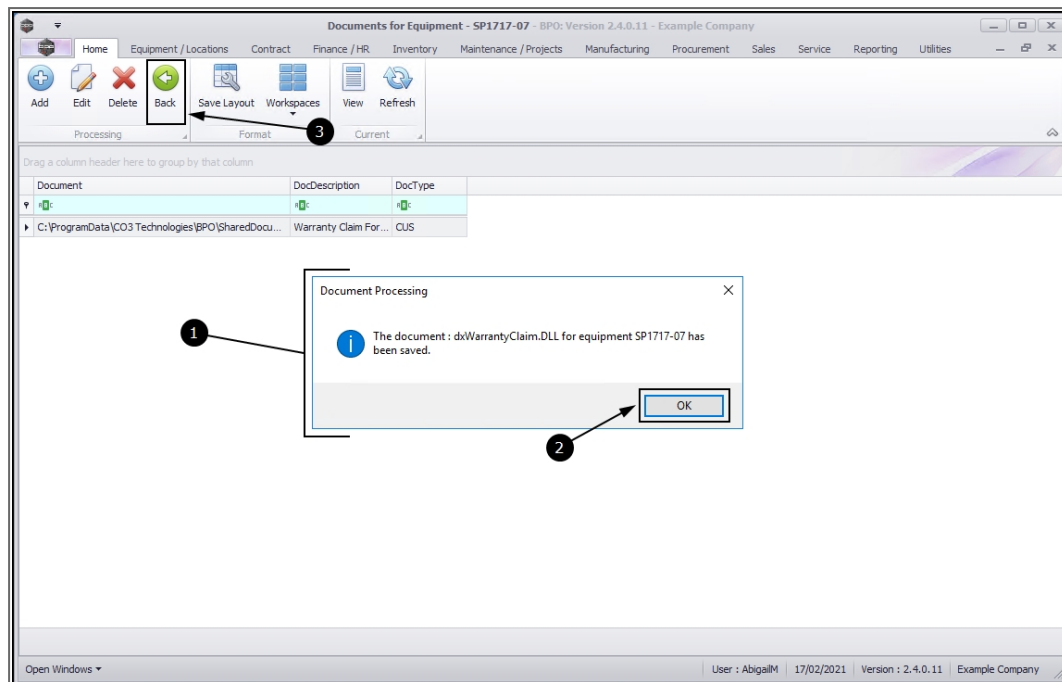
Repository Path: C:\ProgramData\CO3 Technologies\BPO\SharedDocumentAssets\

File Description: Warranty Claim Form

Doc Type: Customer Documentation

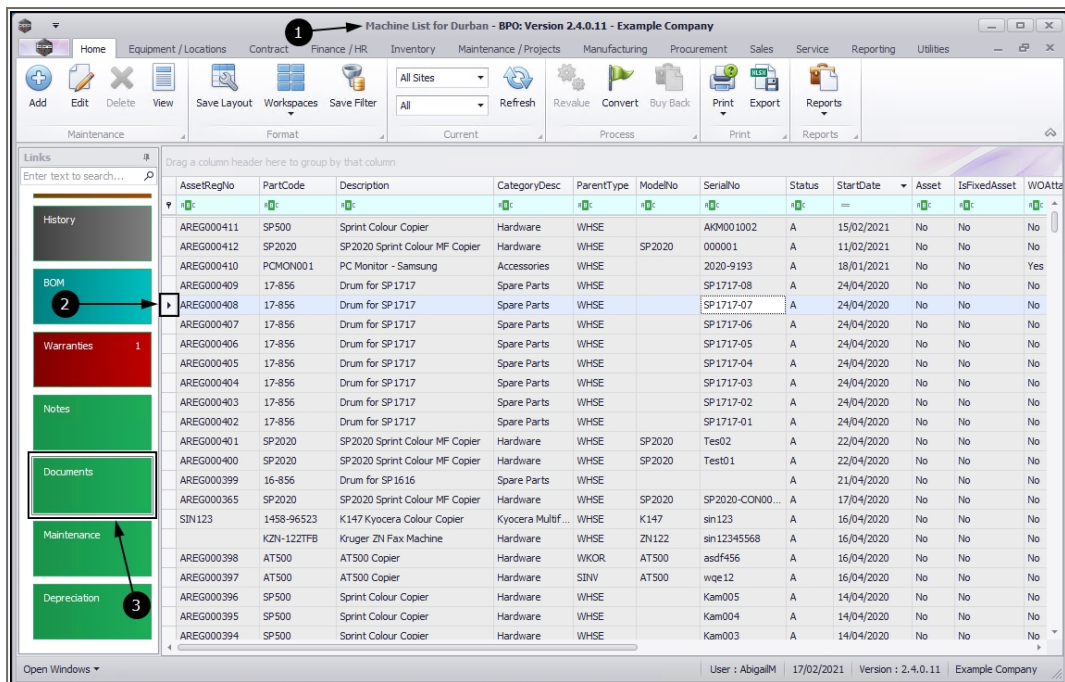
Open Windows User : AbigailM 17/02/2021 Version : 2.4.0.11 Example Company

1. You will return to the **Documents for Equipment - []** screen.
2. A **Document Processing** message box will pop up:
 - The document, [] has been saved.
3. Click on **OK**.
4. Click on **Back** to return to the **Machine List for []** screen.

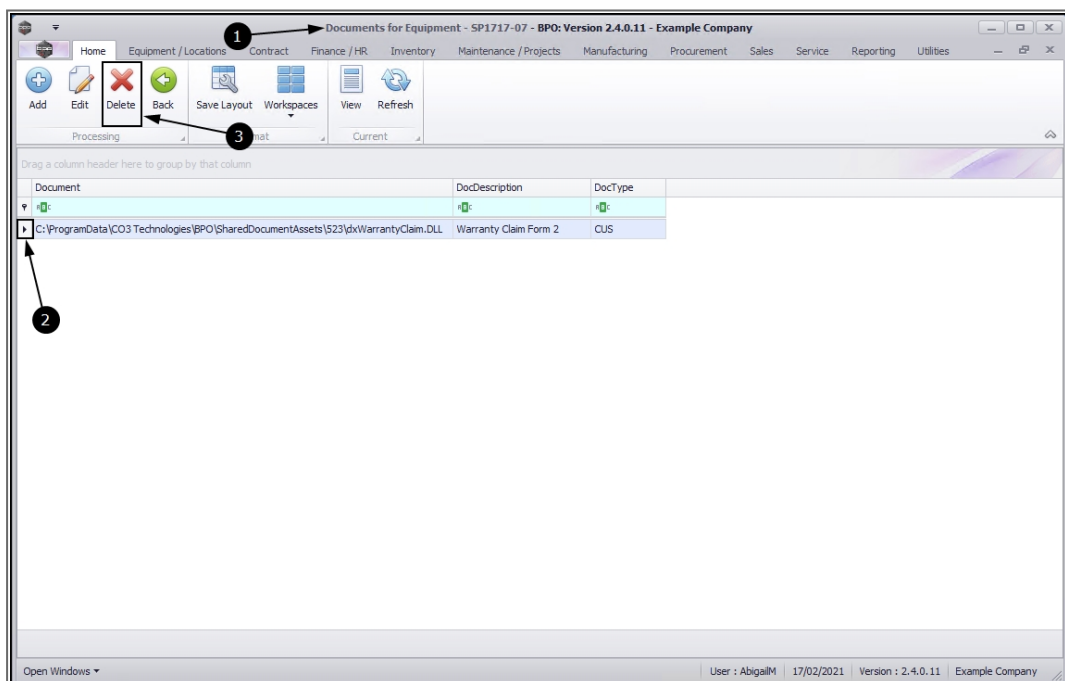


DELETE A DOCUMENT

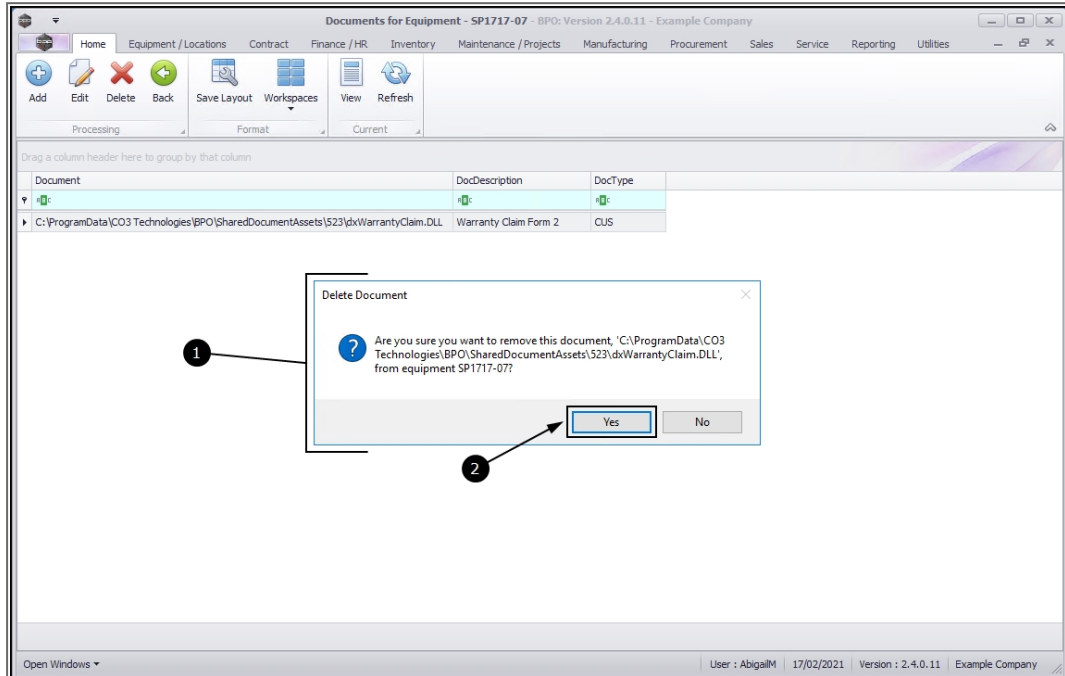
1. In the **Machine List for []** screen,
2. Select the **row** of the **asset** where you wish to **delete** a document.
3. Click on the **Documents** tile.



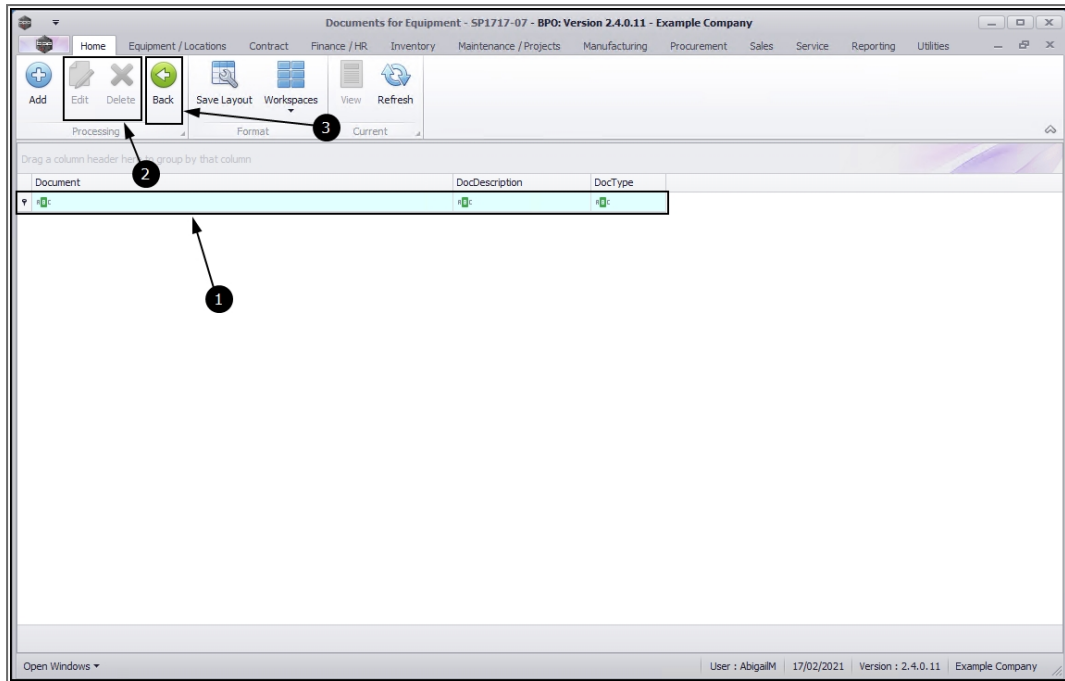
1. The **Document Maintenance for Serial No.: []** screen will open.
2. If there is more than one linked document in the list, select the **row** of the document that you wish to delete.
3. Click on **Delete**.



1. A **Delete Document** message box will pop up:
 - *Are you sure you want to remove this document, '[]' from equipment []?*
2. Click on **Yes**.



1. The selected document will be **removed** from the Documents data grid.
2. You will note that the **Edit** and **Delete** buttons are now inactive (greyed out) this is because, in this example, there are no documents left in this screen to edit or remove.
3. Click on the **Back** button to return to the **Machine list for []** screen.



MNU.007.012