

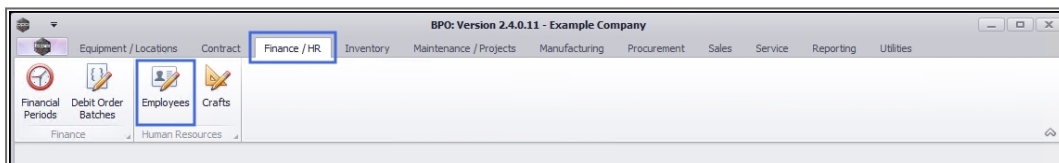
HUMAN RESOURCES

EMPLOYEES – DOCUMENTS

The **Documents** tile allows you to add, edit, delete and view digital documents linked to a selected employee, for example, a contract of employment. All your customer 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: *Finance and HR > Employees*

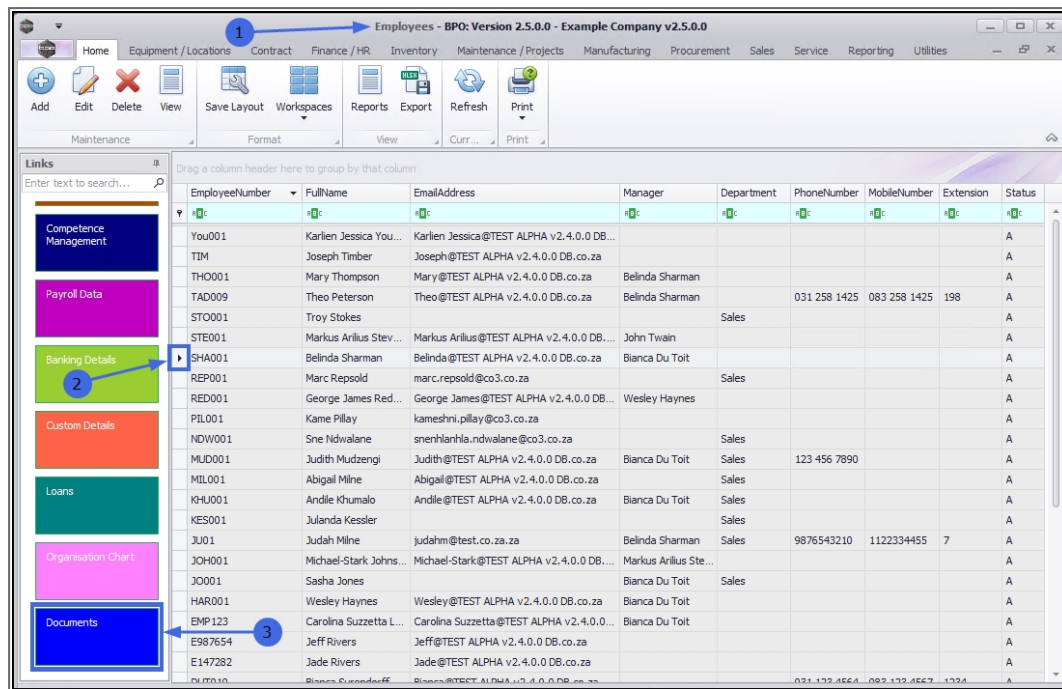


1. The **Employees** listing screen will display.

VIEW EMPLOYEE DOCUMENTS

SELECT EMPLOYEE

2. Select the **row** of the employee whose list of digital documents you wish to view.
3. Click on the **Documents** tile.

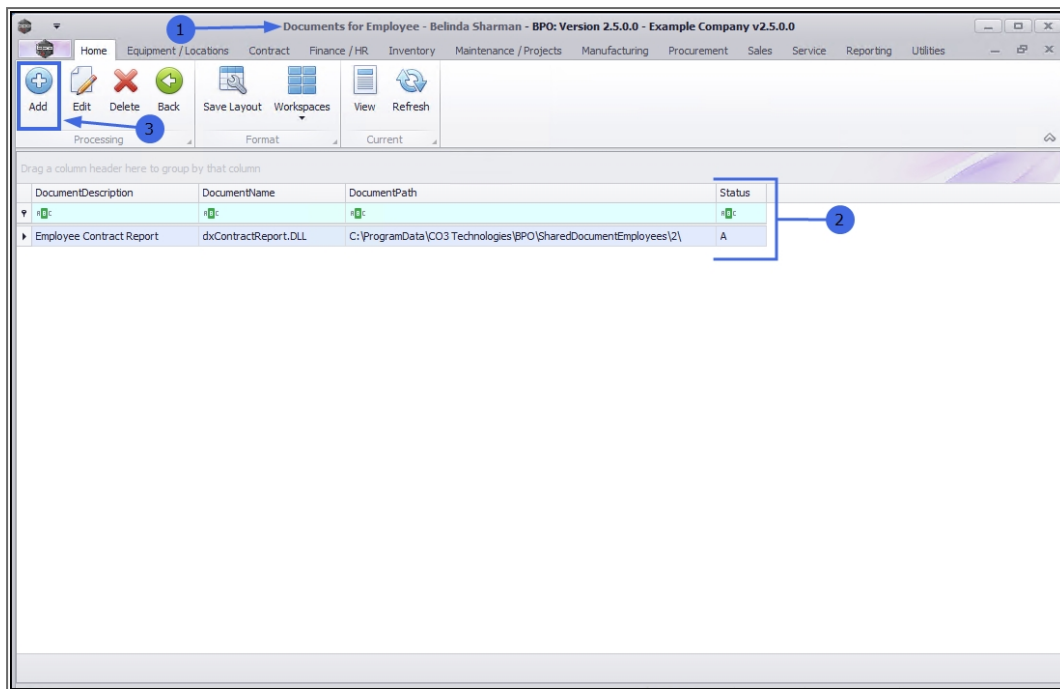


VIEW DOCUMENTS LIST

1. The **Documents for Employee - [/]** screen will open.
2. If there are any documents currently linked to the selected employee, they will be listed here.
 - In this example, only **1** document is currently linked to the employee.

ADD EMPLOYEE DOCUMENT

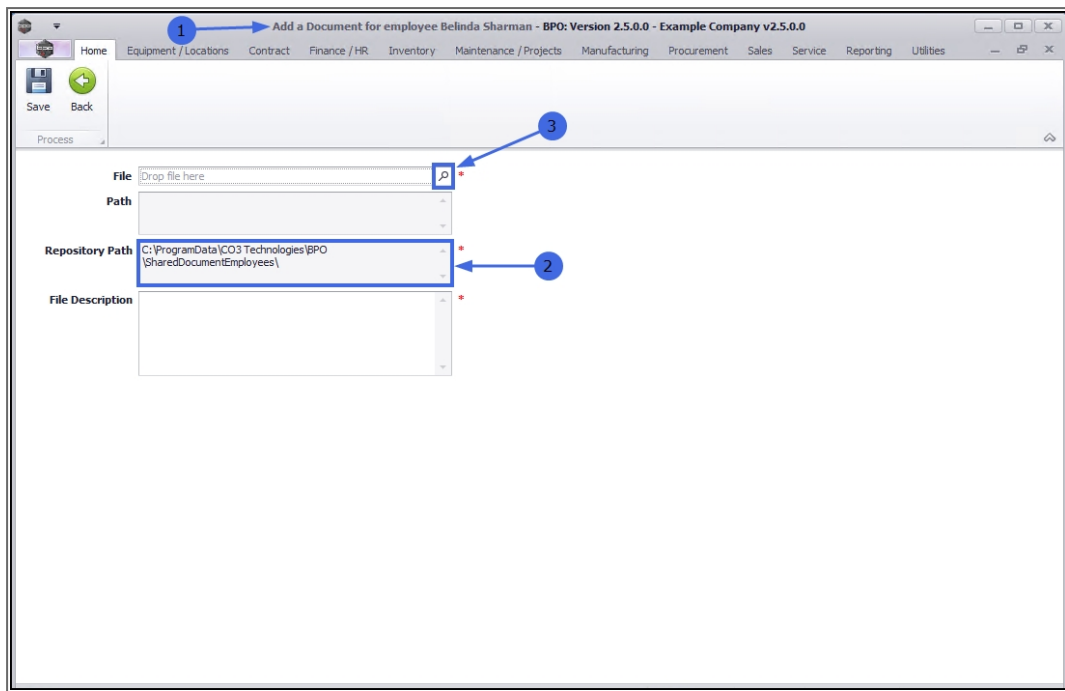
3. Click on **Add**.



1. The **Add a Document for employee []** screen will open.
2. **Note** that the Repository Path field is populated with what has been configured on your system.
 - **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.

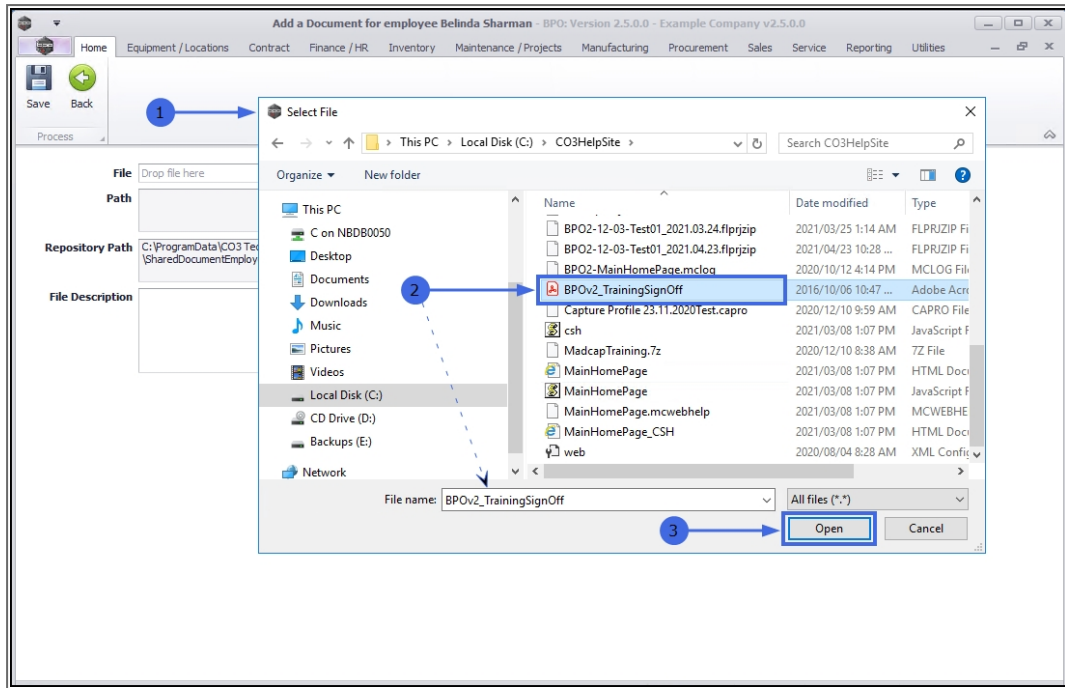
FIND FILE

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



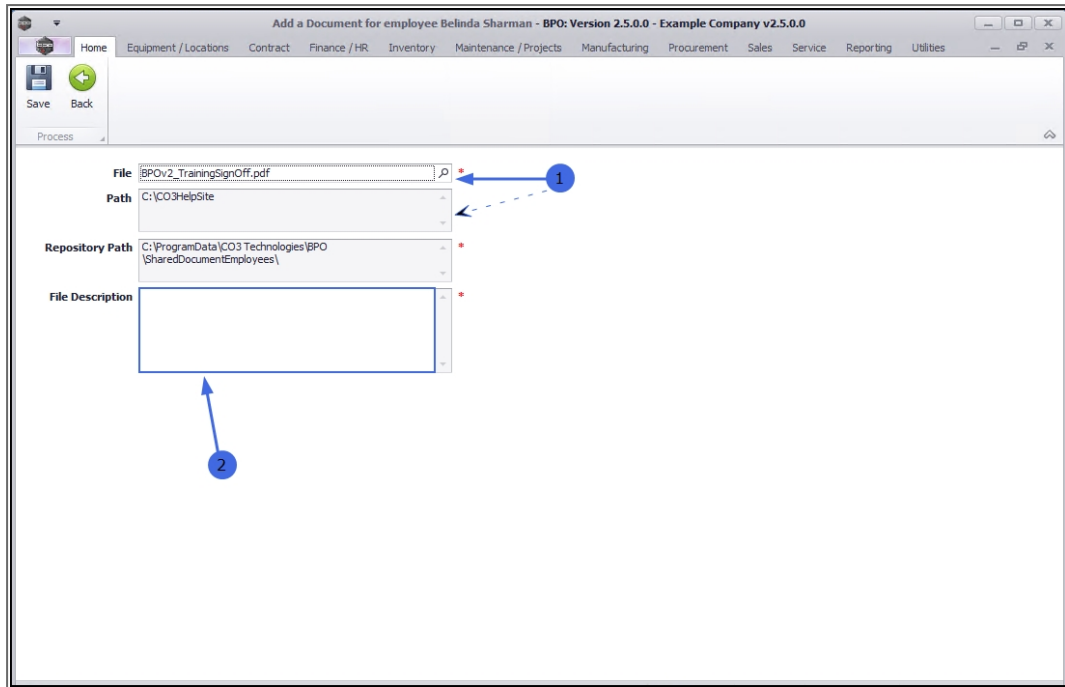
SELECT FILE

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**.



DOCUMENT DETAILS

1. The **File** and **Path** fields will now populate with the details of your selected document.
2. Type a **description** of the attached the document in the **File Description** field.



Add a Document for employee Belinda Sharman - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

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

Save Back

Process

File BPOv2_TrainingSignOff.pdf

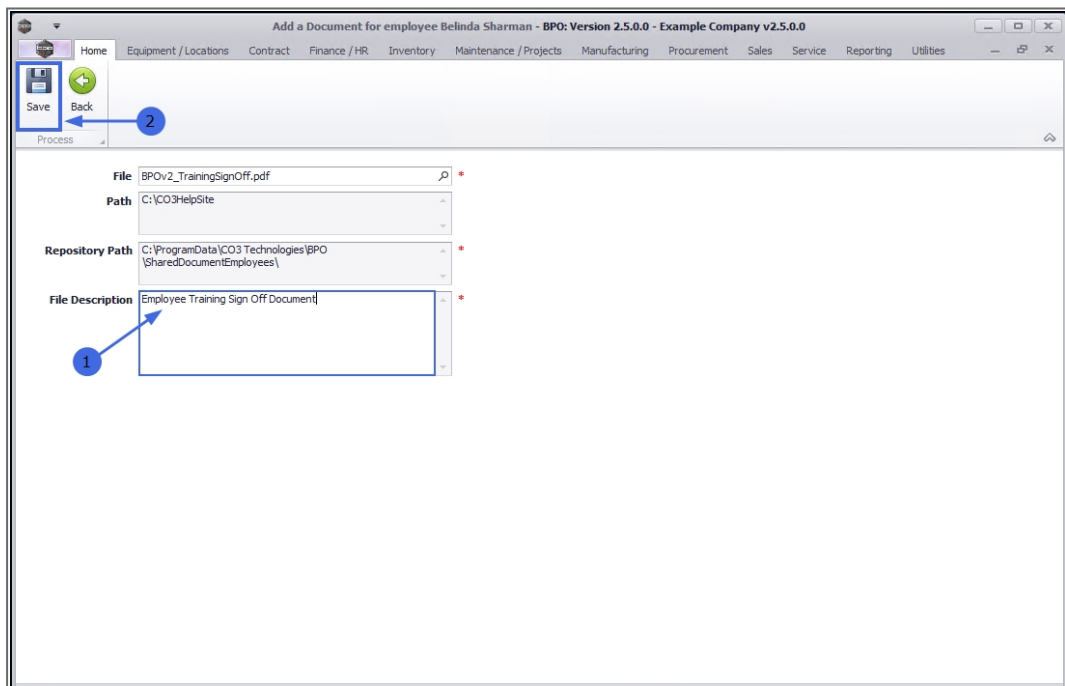
Path C:\CO3HelpSite

Repository Path C:\ProgramData\CO3 Technologies\BPO\SharedDocument\Employees\

File Description

SAVE DOCUMENT

1. When you have added the *File Description*,
2. Click on *Save*.



Add a Document for employee Belinda Sharman - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

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

Save Back

Process

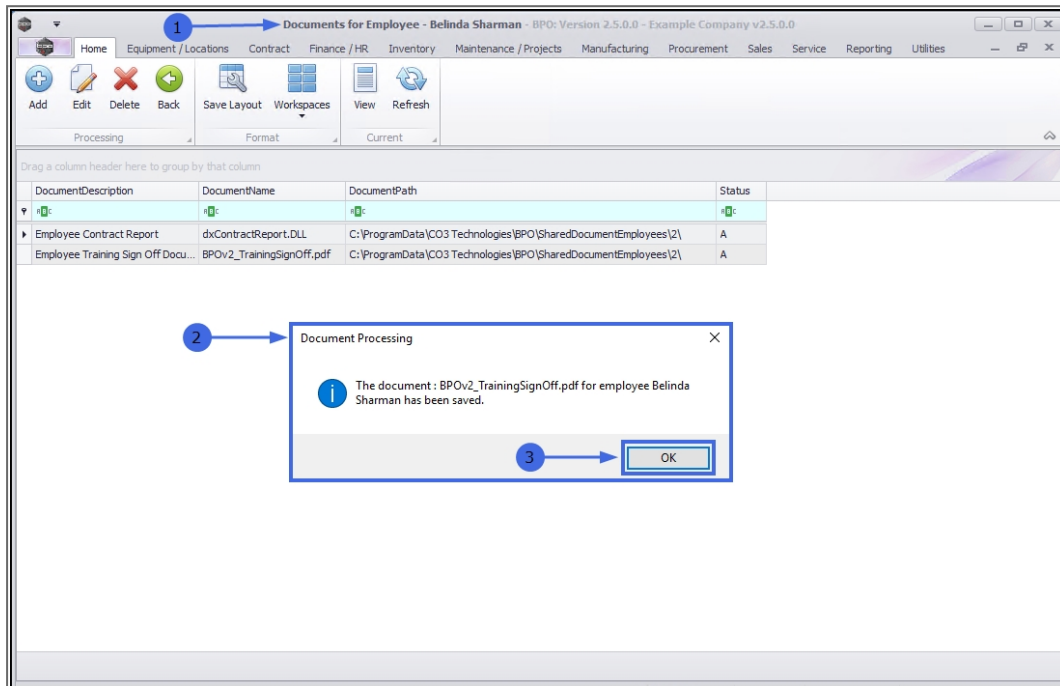
File BPOv2_TrainingSignOff.pdf

Path C:\CO3HelpSite

Repository Path C:\ProgramData\CO3 Technologies\BPO\SharedDocument\Employees\

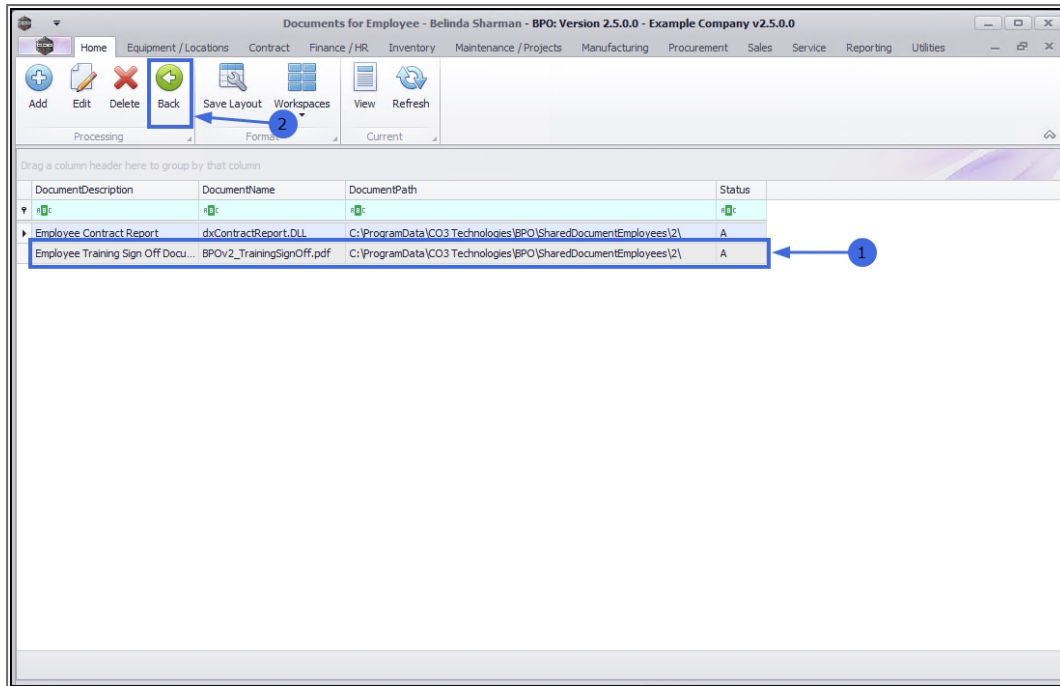
File Description Employee Training Sign Off Document

1. You will return to the **Documents for Employee - []** screen.
2. A **Document Processing** message box will pop up, advising the following:
 - *The document: [] for employee [] has been saved.*
3. Click on **OK**.



VIEW ADDED DOCUMENT

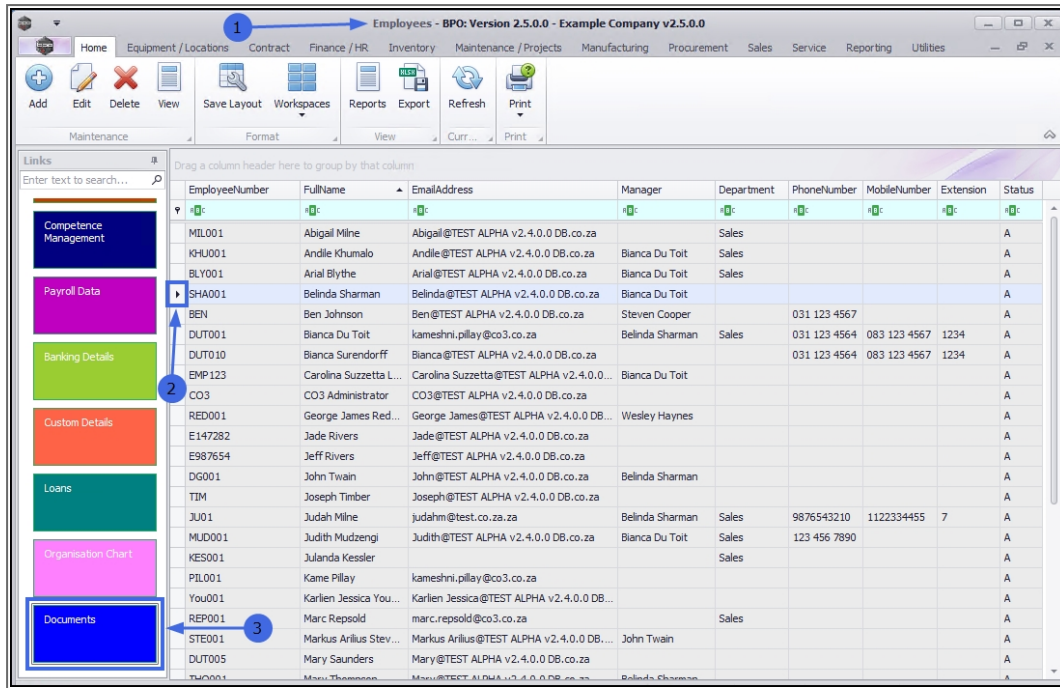
1. You can view the added document in the data grid.
2. Click on **Back** to return to the **Employees** listing screen.



EDIT EMPLOYEE DOCUMENT

SELECT EMPLOYEE

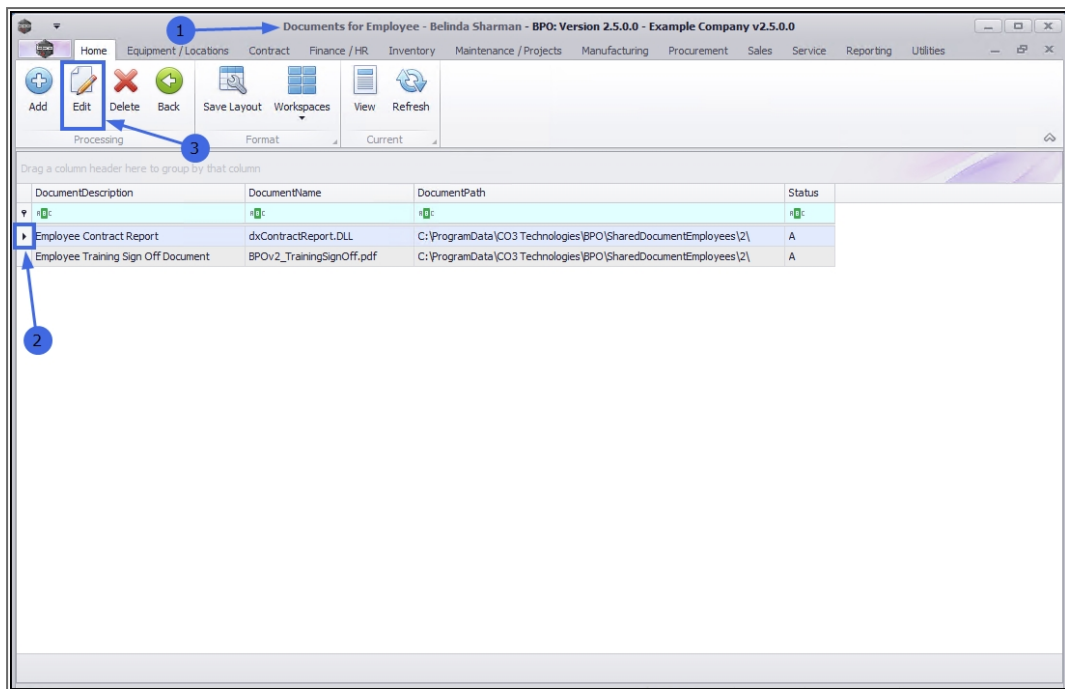
1. In the **Employees** listing screen,
2. Select the **row** of the employee whose document you wish to **edit**.
3. Click on the **Documents** tile.



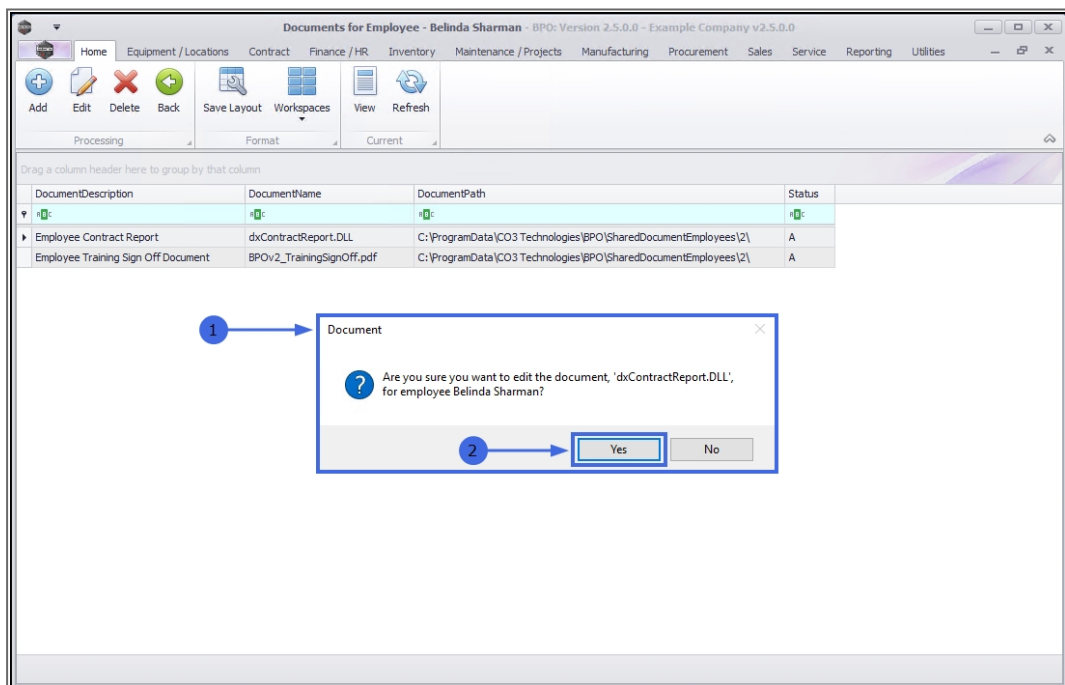
1. The **Documents for Employee - []** screen will open.

SELECT DOCUMENT

2. Select the **row** of the document where you wish to make changes.
3. Click on **Edit**.



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

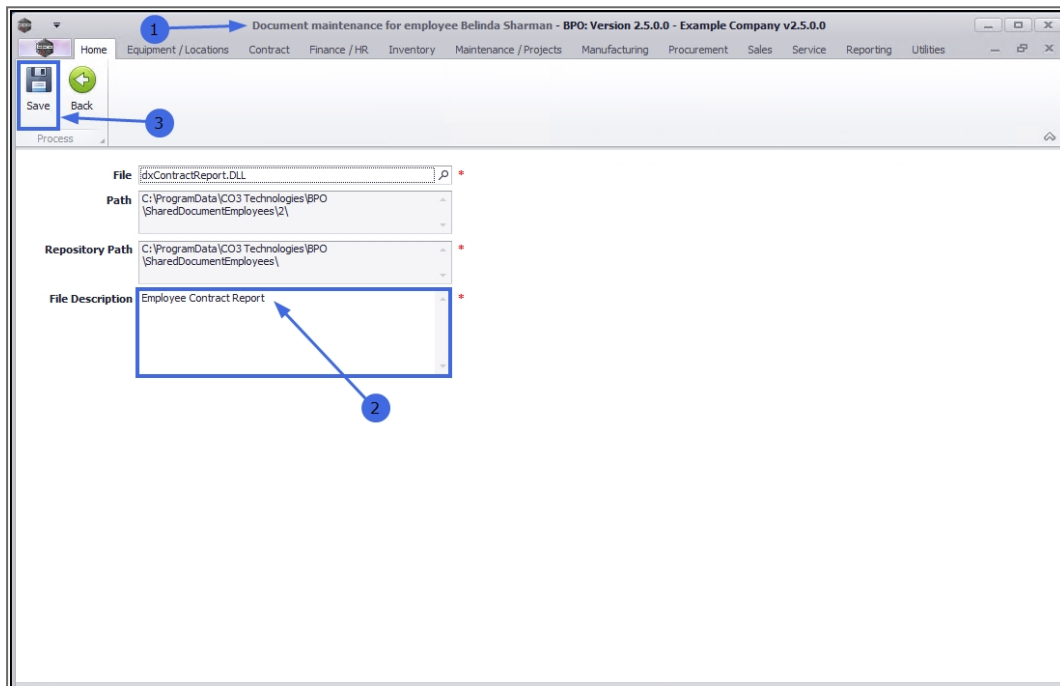


EDIT DOCUMENT DETAILS

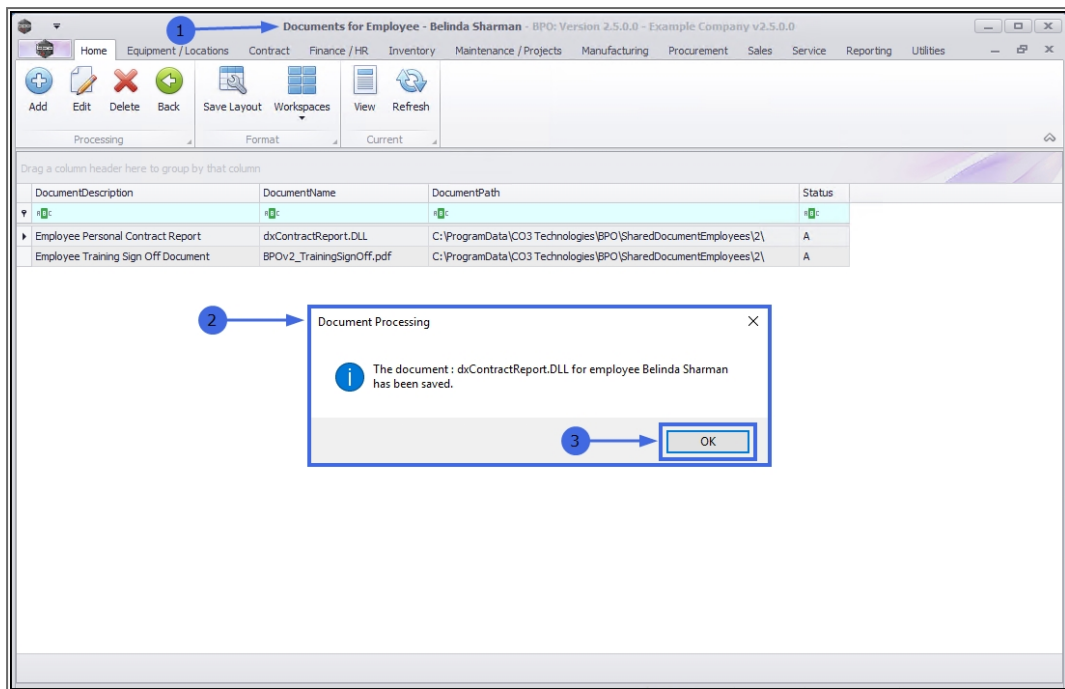
1. The **Document Maintenance for employee []** screen will open.
2. Makes the changes to the relevant fields, as required.
 - In this example, the **File Description** is to be edited.

SAVE EDITED DOCUMENT

3. Click on **Save**.

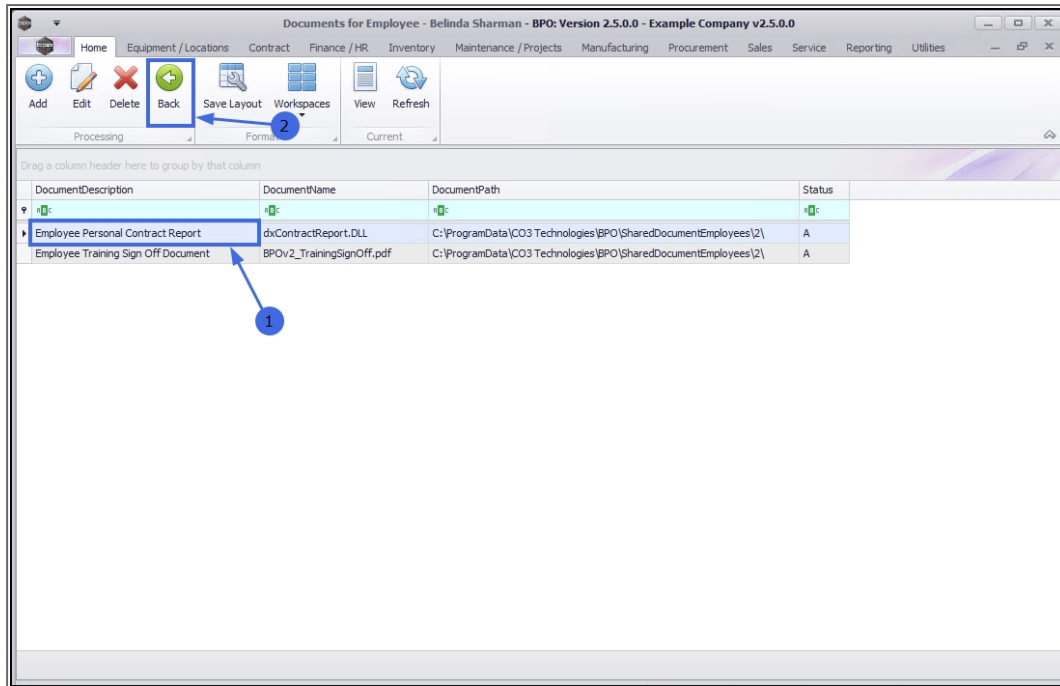


1. You will return to the **Documents for Employee - []** screen.
2. A **Document Processing** message box will pop up advising the following:
 - *The document: [] for employee [] has been saved.*
3. Click on **OK**.



VIEW EDITED DOCUMENT

1. You can view the changes made to the document **details** in the data grid.
 - In this example, the **Document Description** column now displays the changes made in the previous screen.
2. Click on **Back** to return to the **Employees** listing screen.

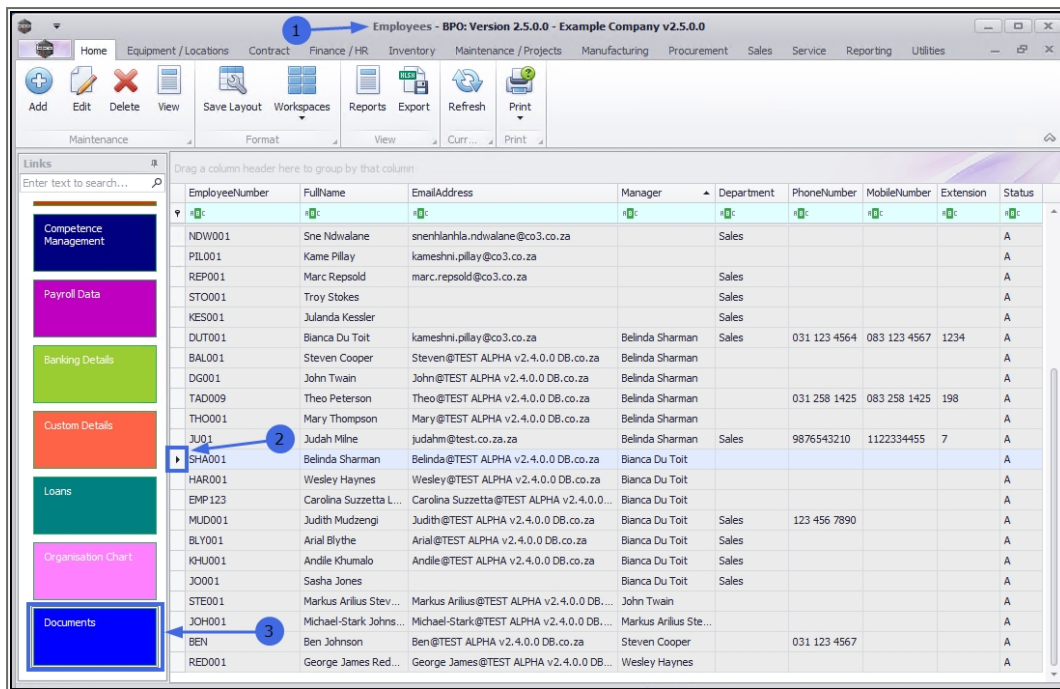


DELETE EMPLOYEE DOCUMENT

1. In the *Employees* listing screen,

SELECT EMPLOYEE

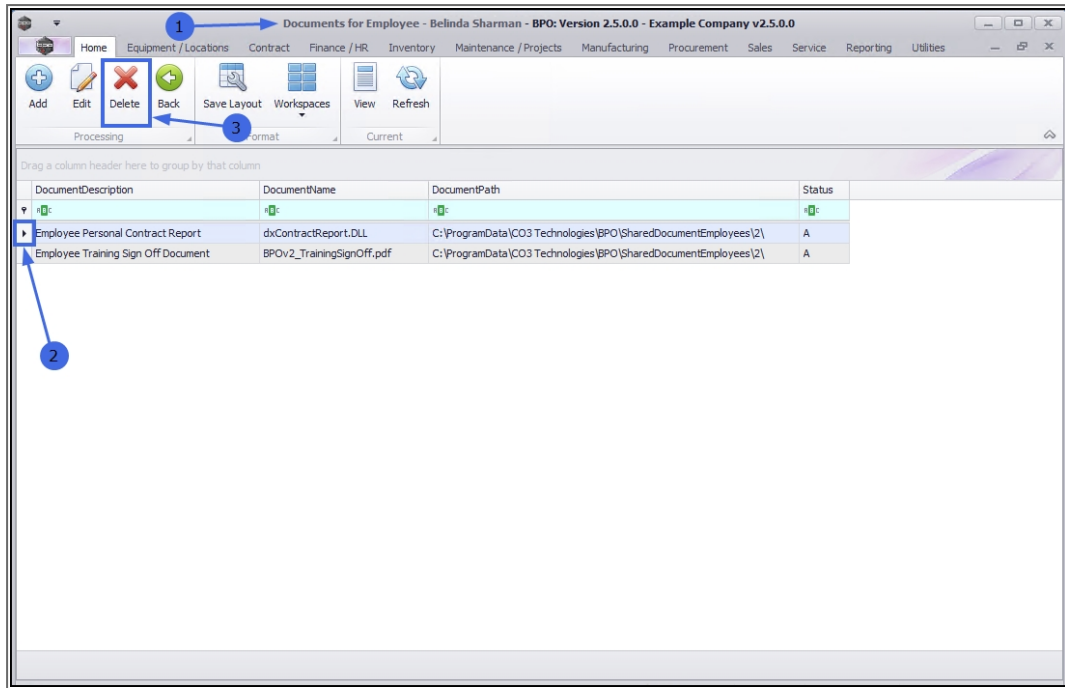
2. Select the **row** of the employee for whom you wish to delete a digital document.
3. Click on the *Documents* tile.



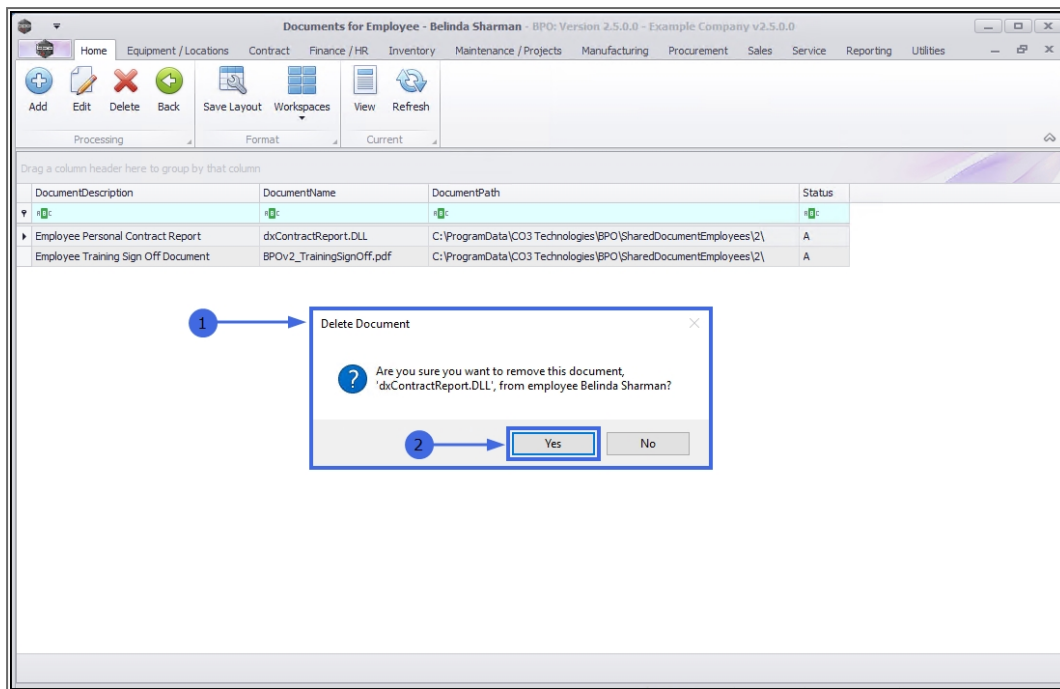
1. The **Documents for Employee - []** screen will open.

SELECT DOCUMENT

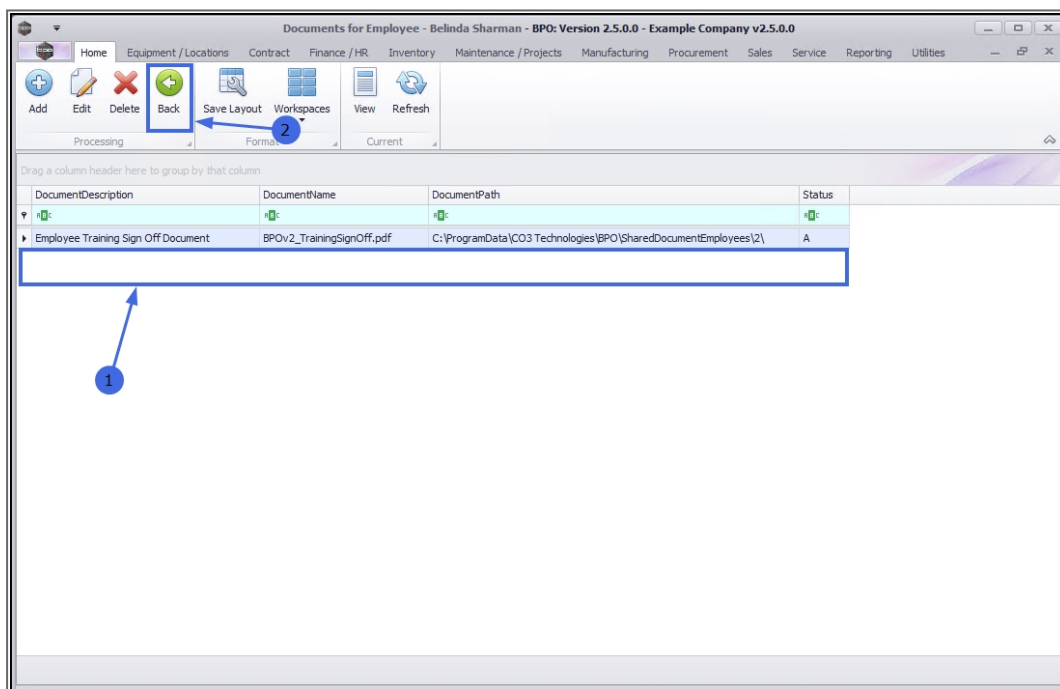
2. Select the **row** of the document that you wish to remove from the data grid.
3. Click on **Delete**.



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



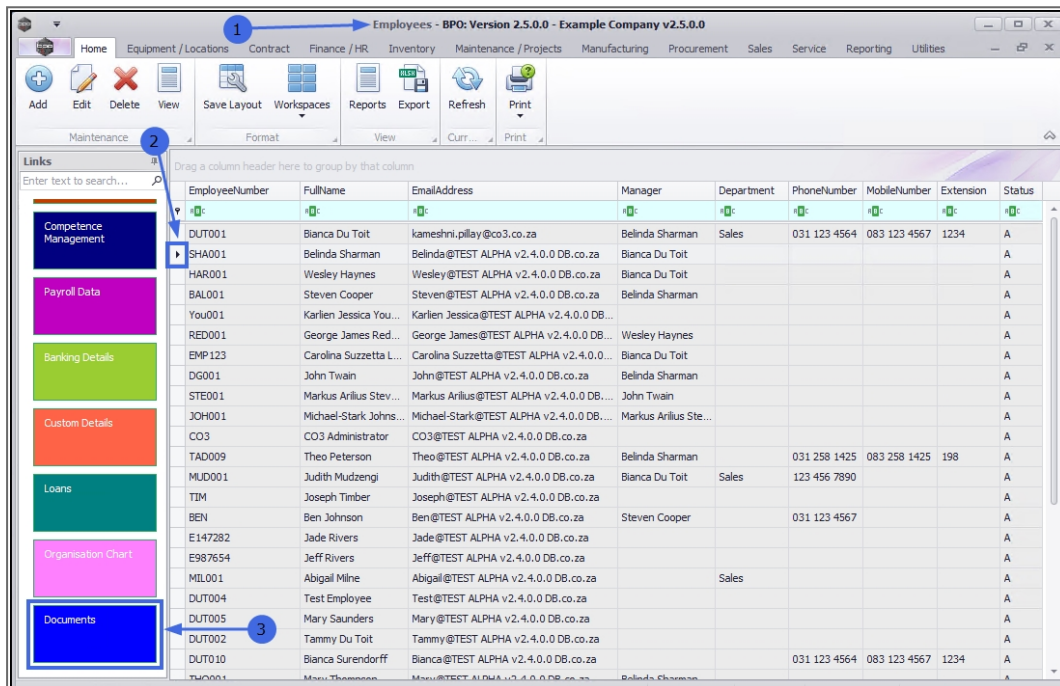
1. The selected document will be **removed** from the data grid.
2. Click on **Back** to return to the **Employees** listing screen.



VIEW /OPEN EMPLOYEE DOCUMENT

SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **row** of the employee whose document you wish to **open** and **view**.
3. Click on the **Documents** tile.

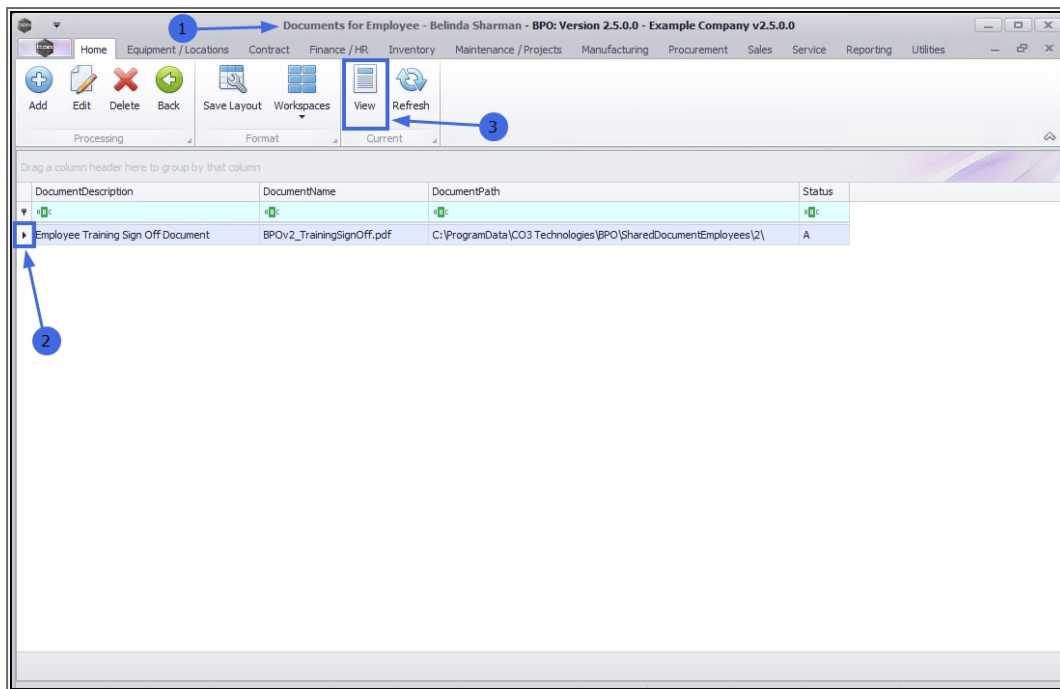


EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Status
DUT001	Blanca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A
SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Blanca Du Toit					A
HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Blanca Du Toit					A
BAL001	Steven Cooper	Steven@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
You001	Karlien Jessica You...	Karlien Jessica@TEST ALPHA v2.4.0.0 DB...						A
RED001	George James Red...	George James@TEST ALPHA v2.4.0.0 DB...	Wesley Haynes					A
EMP123	Carolina Suzzetta L...	Carolina Suzzetta@TEST ALPHA v2.4.0.0...	Blanca Du Toit					A
DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
STE001	Markus Arilius Stev...	Markus Arilius@TEST ALPHA v2.4.0.0 DB...	John Twain					A
JOH001	Michael-Stark Johns...	Michael-Stark@TEST ALPHA v2.4.0.0 DB...	Markus Arilius Ste...					A
CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A
TAD009	Theo Peterson	Theo@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman		031 258 1425	083 258 1425	198	A
MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Blanca Du Toit	Sales	123 456 7890			A
TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A
BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A
E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A
E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A
MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A
DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT010	Blanca Surendorff	Blanca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A
TMO001	Moss Thompson	Moss@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A

1. The **Documents for Employee - []** screen will open.

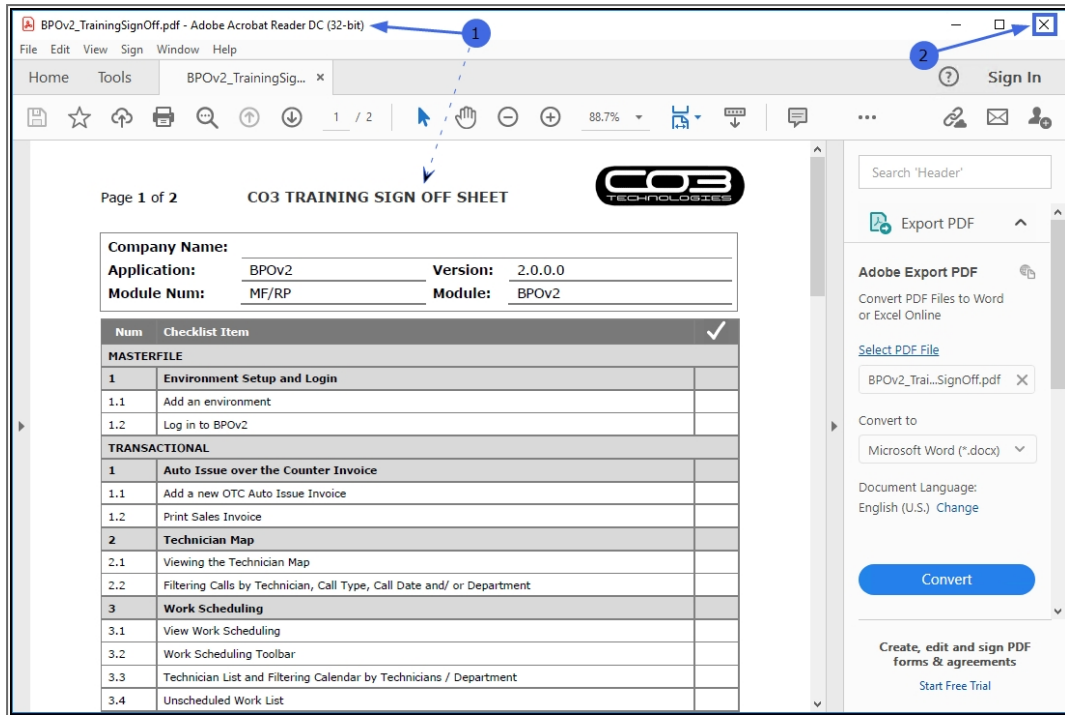
SELECT DOCUMENT

1. Select the **row** of the document you wish to open and view.
2. Click on **View**.



VIEW DOCUMENT CONTENTS

1. The document will open with the relevant program, e.g. 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 Employee - []** screen.



Page 1 of 2

CO3 TRAINING SIGN OFF SHEET

Company Name: _____

Application: BPOv2 **Version:** 2.0.0.0

Module Num: MF/RP **Module:** BPOv2

Num	Checklist Item	✓
MASTERFILE		
1	Environment Setup and Login	
1.1	Add an environment	
1.2	Log in to BPOv2	
TRANSACTIONAL		
1	Auto Issue over the Counter Invoice	
1.1	Add a new OTC Auto Issue Invoice	
1.2	Print Sales Invoice	
2	Technician Map	
2.1	Viewing the Technician Map	
2.2	Filtering Calls by Technician, Call Type, Call Date and/ or Department	
3	Work Scheduling	
3.1	View Work Scheduling	
3.2	Work Scheduling Toolbar	
3.3	Technician List and Filtering Calendar by Technicians / Department	
3.4	Unscheduled Work List	

Search 'Header'

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