

SERVICE

MY WORK - VIEW, ADD, OPEN (DIGITAL) DOCUMENTS

Digital documents (e.g. documents scanned to PDF) can be linked in various places on BPO.

These documents should be saved in a shared folder on the **server** to enable all users with the relevant security rights to view the documents. If saved and linked from the workstation, another workstation <u>cannot</u> view the document.

This process will show you how to link these documents to the work order via the **My Work** screen.

Ribbon Access: Service > My Work





The *My Work* listing screen will be displayed.



• Click on the *row selector* in front of the *work order* that you wish to *view* the linked *digital documents* of.

• Click on *Edit*.

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E W00001663	Copier to be repaired	Durban	0	REP	Machine Repairs							151



VIEW LINKED DOCUMENTS

The *Maintain WO - Ref []* screen will be displayed.

• Click on the *Documents* tile.



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The *Documents for WO - []* screen will be displayed.



• Here you can view a *list* of all the *digital documents* linked to this work order.

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ADD A NEW DOCUMENT

In the *Documents for Work Order - []* listing screen, click on *Add*.



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The *New Document for Work Order: []* screen will be displayed.



- You will note that the Repository Path is auto populated according to the path that has been set up in the company configuration.
- Click on the *search* button in the *File* field to find the document in the *shared location* on the server.



			New Document	for Work On	der. : WO0001664 - BPO: Ve	rsion 2.1.0.58 - Ex	ample Compan	y .			1	٥	2
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- The *Select File* screen will pop up.
- Select the relevant document to attach to this work order.



New Document for Work Order. : WO0001664 - 8PO: Version 2.1.0.58 - Example Company 0 X Equipment and locations Contract Finance and HR Inventory Mantenance and Projects Manufacturing Procurement Sales Service Reporting Utilities – 🗗 🗙 Home Back Save Process ρ. File Drop file here Path 🖨 Select File х ↑ 🗄 → This PC → Documents ✓ ♂ Search Documents p li • 🔟 (Organise * New folder BPOHelp - Documer ^ Name Date modified Type 50 в ногранитольский DUIDIVITEJ 6:51 MM COMPRESSED LODD... Versions BPO2 BPO2_HelpFile_CountAnalysis_AbiWorkl... 2018/02/14 9:49 AM Microsoft Excel W... This PC BP02_HelpFile_CountAnalysis_AbiWorkI... 2018/01/30 10:25 AM Microsoft Excel W ... BPO2_HelpFile_CountAnalysis_AbiWorkI... 2018/01/30 12:34 AM Microsoft Excel W... 3D Objects BP02_HelpFile_CountAnalysis_AbiWorkl... 2018/01/05 12:28 PM Microsoft Excel W... Desktop BPO2_HelpFile_CountAnalysis_AbiWorkl... 2017/11/28 11:09 AM Microsoft Excel W... 1 Documents BPO2_HelpFile_Progress (version 1) (versi... 2018/05/21 1:21 AM Microsoft Excel W... Downloads BPO2_HelpFile_Progress (version 1) (versi... 2018/04/16 12:14 AM. Microsoft Excel W ... Music BPO2_Manuals.7z 2017/10/05 2:47 PM 72 File Pictures Company Name.docx 2018/01/29 12:50 PM Microsoft Word D ... Videos Contracts.xml 2017/07/28 9:14 AM XML Document 📲 Doc1.docx 🛛 🗲 2017/09/17 9:17 PM Microsoft Word D ... Windows (C:) Documents - Shortcut 2018/03/09 2:34 PM Shortcut Recovery Image (D:) Music - Shortcut 2017/07/18 11:32 PM Shortcut Network Pictures - Shortcut 2017/07/21 10:23 AM Shortcut UK Trip.docx 2018/04/15 8:23 AM Microsoft Word D., • Homegroup ۲. File name: v All files (".") Ŵ. Open Cancel 17 May 2018 Open Windows *

• Click on Open.



- File: This will now auto populate with the selected document file name.
- **Path:** This will now auto populate with the selected document file path name.
- **Repository Path:** This is auto populated according to the path that has been set up in the company configuration.
- **File Description** Click in this text box and type in a description for this attached document.
- **Doc Type:** Click on the drop-down arrow and select from the menu the document type.



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• When you have finished adding the new document details, click on *Save*.



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• A *Document Processing* message box will pop up informing you that;



• The document: [] for work order [] has been saved.

• Click on OK.

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OPEN AND VIEW DOCUMENT CONTENTS

- Click on the *row selector* in front of the *work order* that you wish to *open/view* the linked documents of.
- Click on *Edit*.



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The *Maintain WO - Ref []* screen will be displayed.

• Click on the *Documents* tile.



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The *Documents for Work Order - []* screen will be displayed.



- Click on the *row selector* in front of the *document* you wish to *open/view* (ensure that you have selected the correct document by reviewing the information in the Document and Doc Description fields).
- Click on *View*.

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• The document will open within the relevant program, e.g. a *Word* document will open in *Word*, a *PDF* file will open in *Adobe*



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