

We are currently updating our site; thank you for your patience.

SERVICE

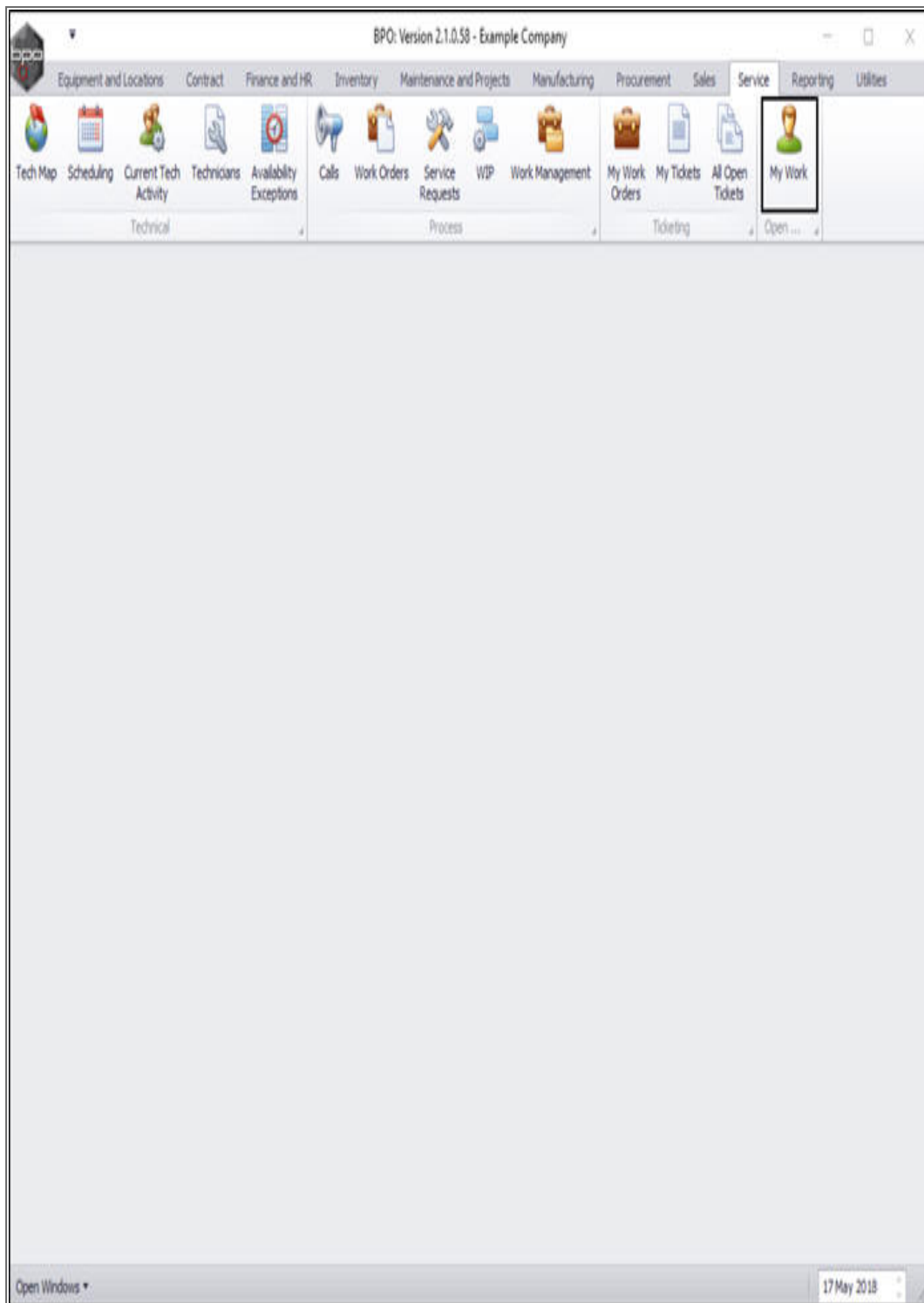
MY WORK – VIEW, ADD, OPEN (DIGITAL) DOCUMENTS

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 cannot view the document.

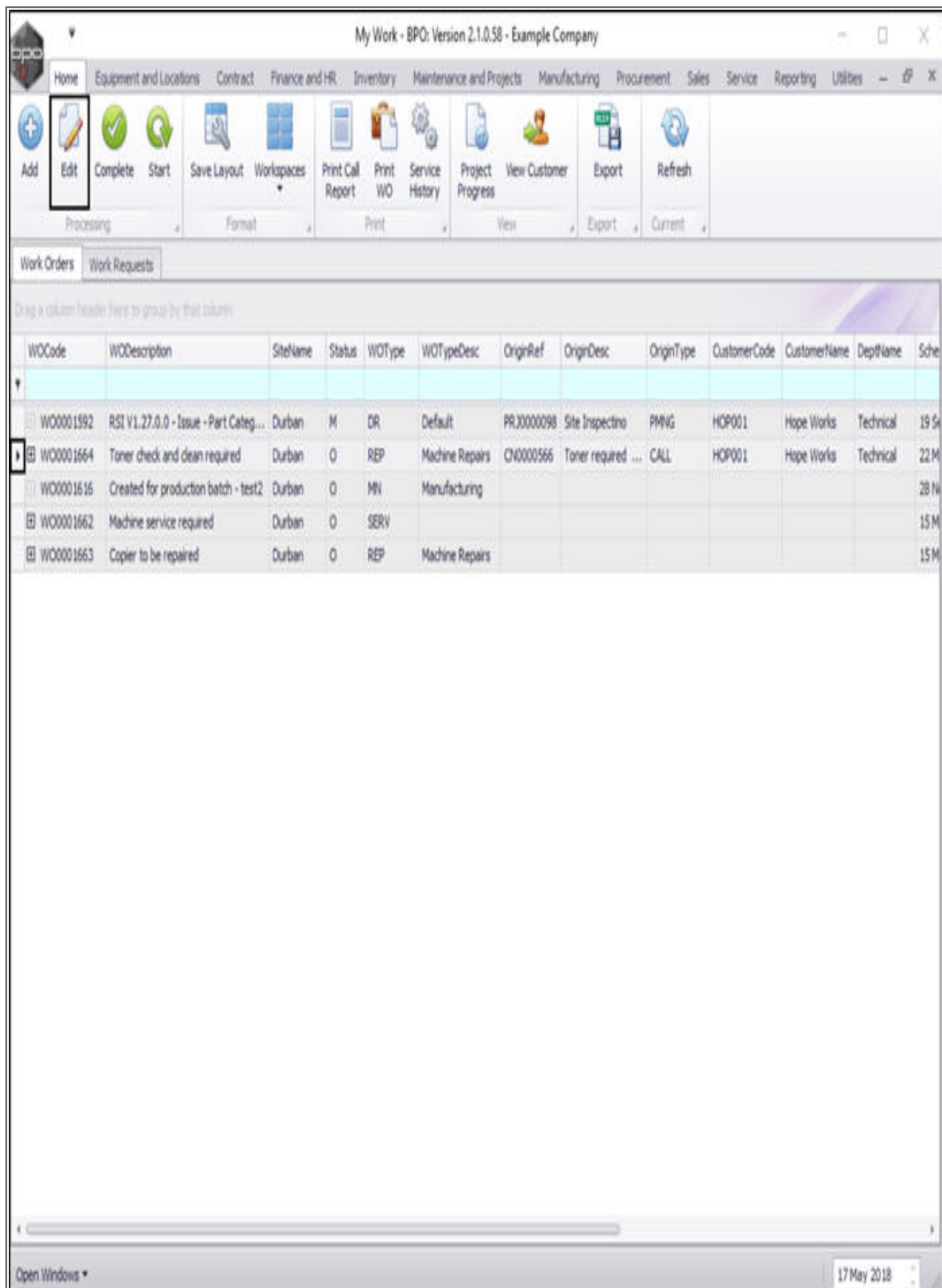
This process will show you how to link these documents to the work order via the **My Work** screen.

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**.



| WOCode | WODescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | Schedule |
|-----------|---------------------------------------|----------|--------|--------|-----------------|------------|--------------------|------------|--------------|--------------|-----------|-------------|
| WO0001392 | RSI V1.27.0.0 - Issue - Part Categ... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope Works | Technical | 19 May 2018 |
| WO0001664 | Toner check and clean required | Durban | O | REP | Machine Repairs | CH0000566 | Toner required ... | CALL | HOP001 | Hope Works | Technical | 22 May 2018 |
| WO0001616 | Created for production batch - test2 | Durban | O | MN | Manufacturing | | | | | | | 28 May 2018 |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | | | 15 May 2018 |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | | | 15 May 2018 |

VIEW LINKED DOCUMENTS

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

- Click on the **Documents** tile.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Swap Out

Meters

Expenses

Travel 1

Documents

Warranties Issued

Instructions

Images

Meters

Open Windows

17 May 2018

Description: Toner check and clean required

Requestor: Abigal Mline

WO Type: Repair

Priority: 2

Request Date: 18 May 2018 09:42:59

Status: Open

Billable: ☐

Capitalise: ☐

Work Order Item

Functional Location: Equipment

Item: 2020-103053

Comment: Check Colour Toner - not printing effectively

Links:

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | CH0000566 |
| PMNG | Project Reference | |

Schedule:

Assigned To: Abigal Mline

Assigned By: Abigal Mline

Scheduled Start: 22 May 2018 00:00:00

Scheduled End: 22 May 2018 02:00:00

Actual Start: 17 Jun 2018 00:00:00

Actual End: 17 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

Rectification Code:

Rectification Comments:

Completion Date: 17 Jun 2018 00:00:00

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

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

Documents for Work Order - W00001664 - BPO: Version 2.1.0.58 - Example Company

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

Add Edit Delete Back Save Layout Workspaces View Refresh

Processing Format Current

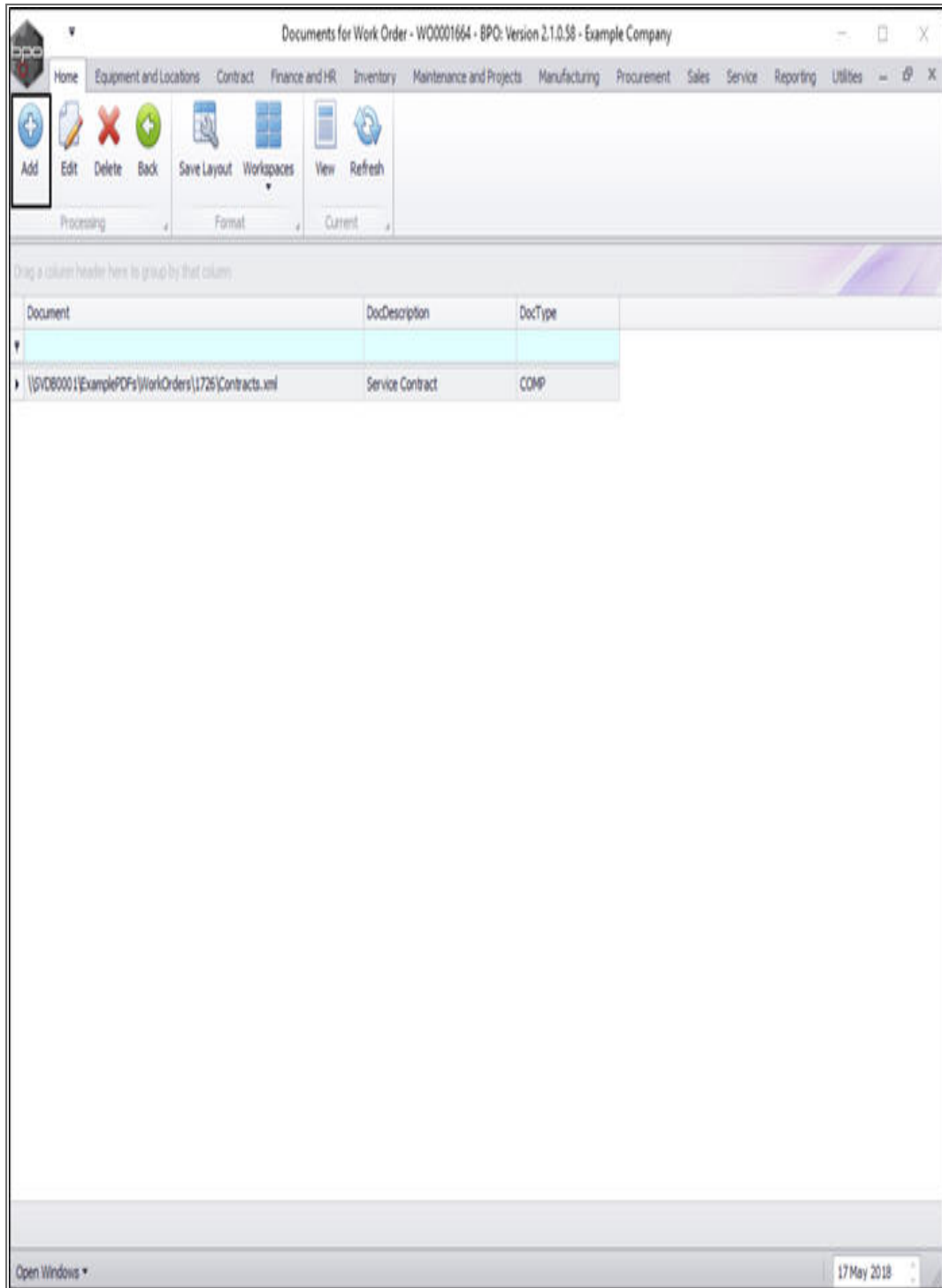
Drag a column header here to group by that column

| Document | DocDescription | DocType |
|--|------------------|---------|
| \\SYD80001\ExamplePDFs\WorkOrders\1726\Contracts.xml | Service Contract | COMP |

Open Windows 17 May 2018

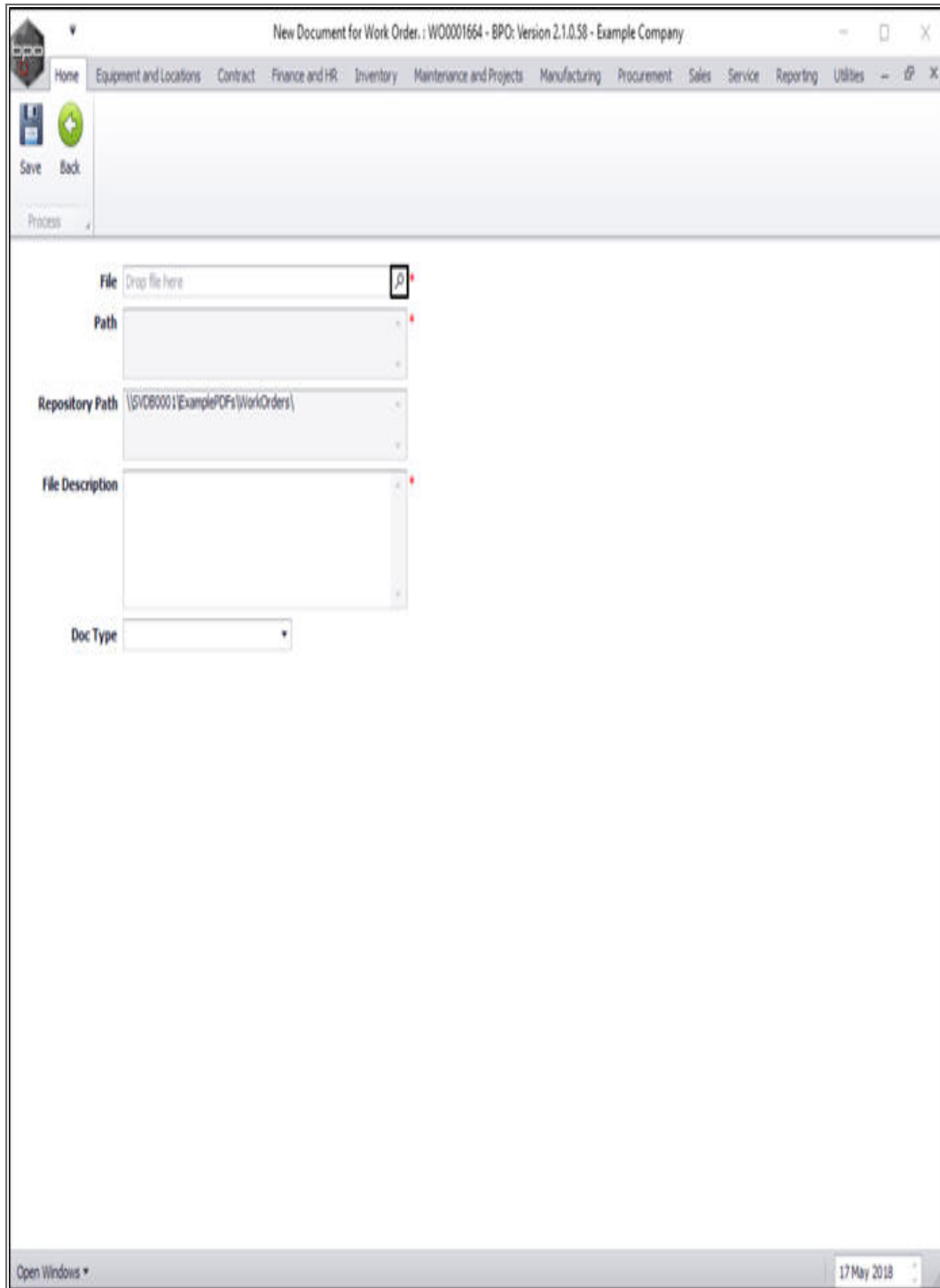
ADD A NEW DOCUMENT

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



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 Order : WO0001664 - BPD: Version 2.1.0.58 - Example Company

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

Save Back

Process

File Drop file here

Path

Repository Path \\SYCB0001\\ExamplePOFs\\WorkOrders\\

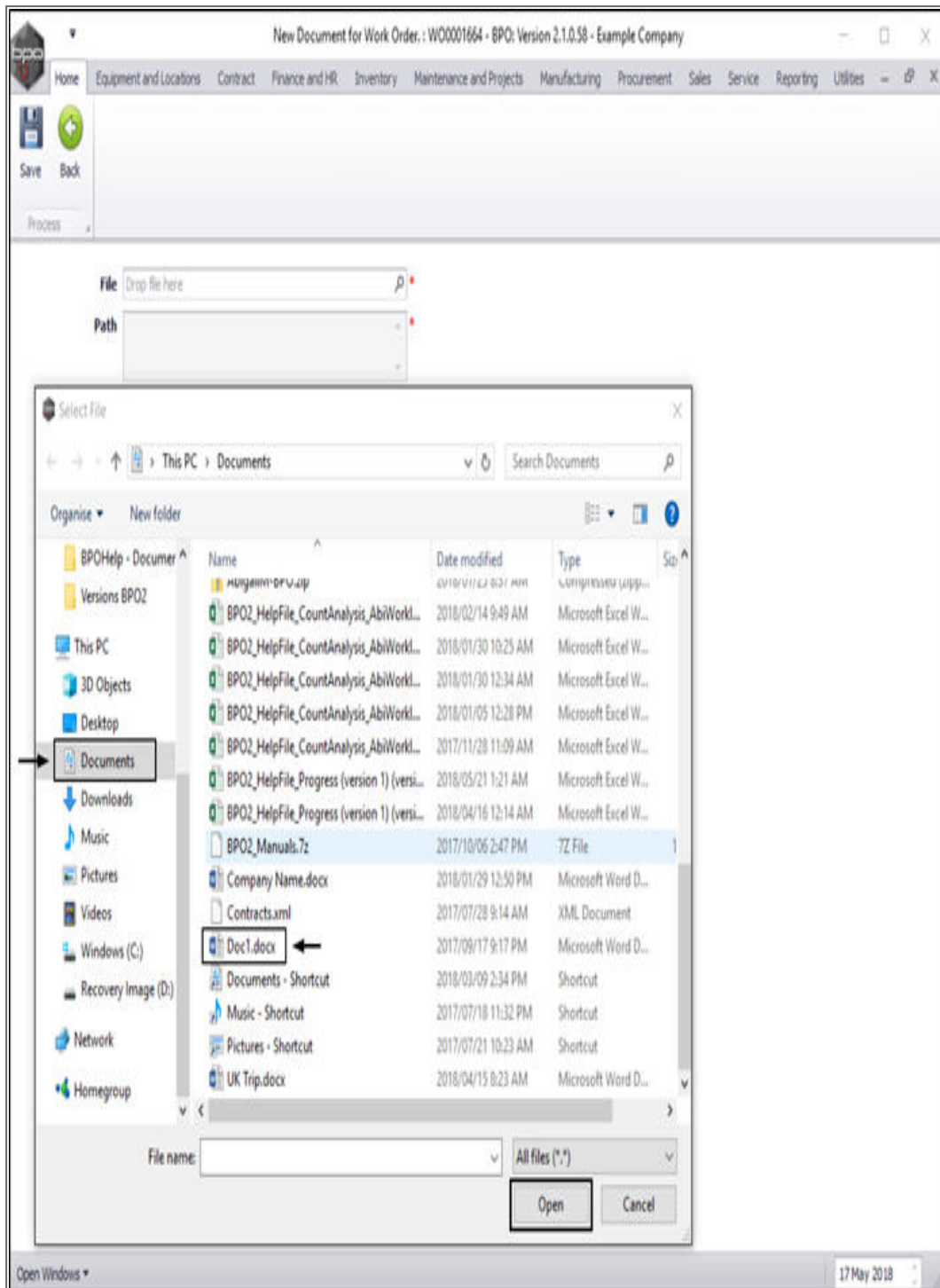
File Description

Doc Type

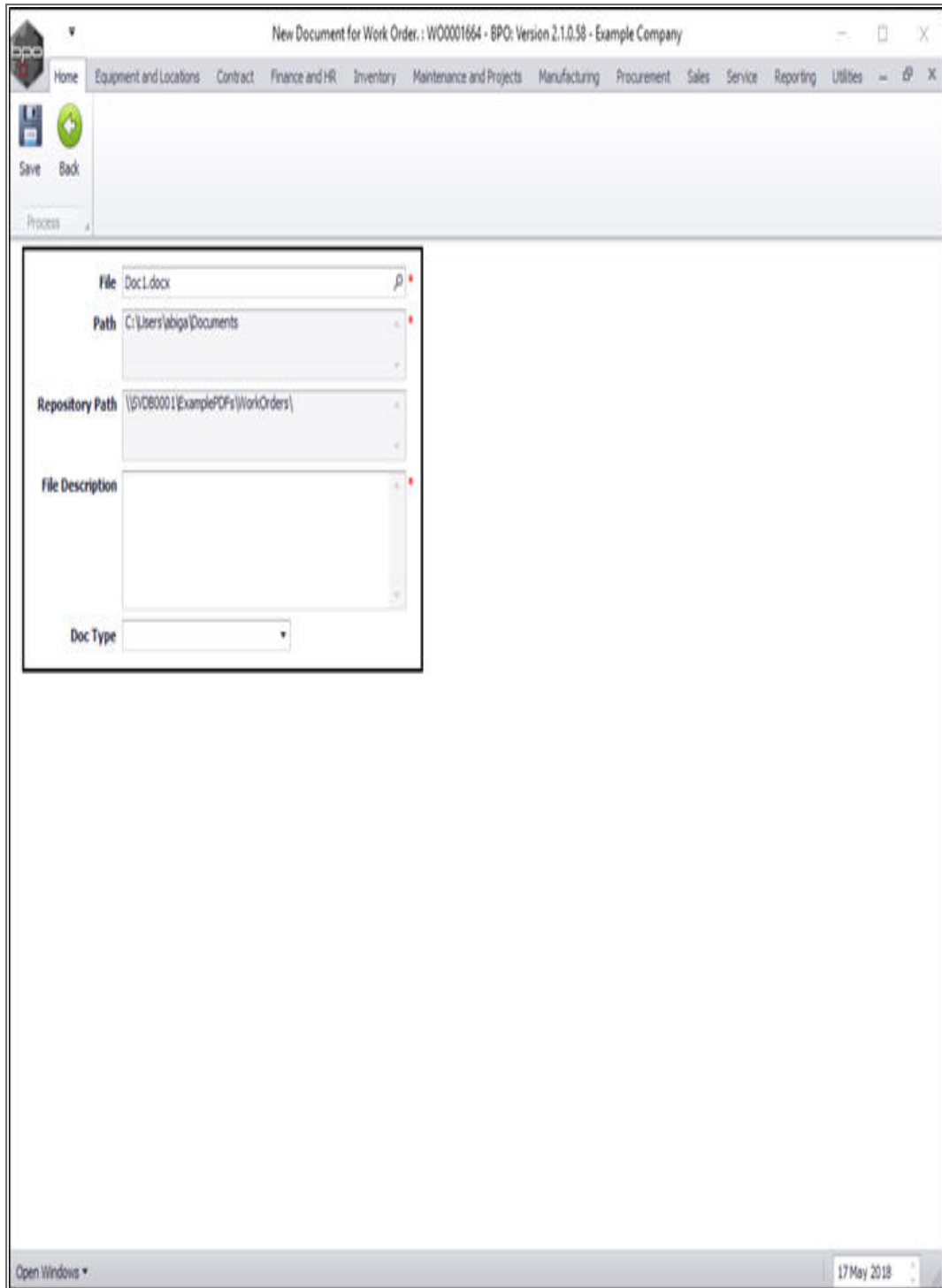
Open Windows 17 May 2018

- The **Select File** screen will pop up.
- Select the relevant document to attach to this work order.

- 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.



New Document for Work Order : WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Save Back

Process

File Doc1.docx

Path C:\Users\abiga\Documents

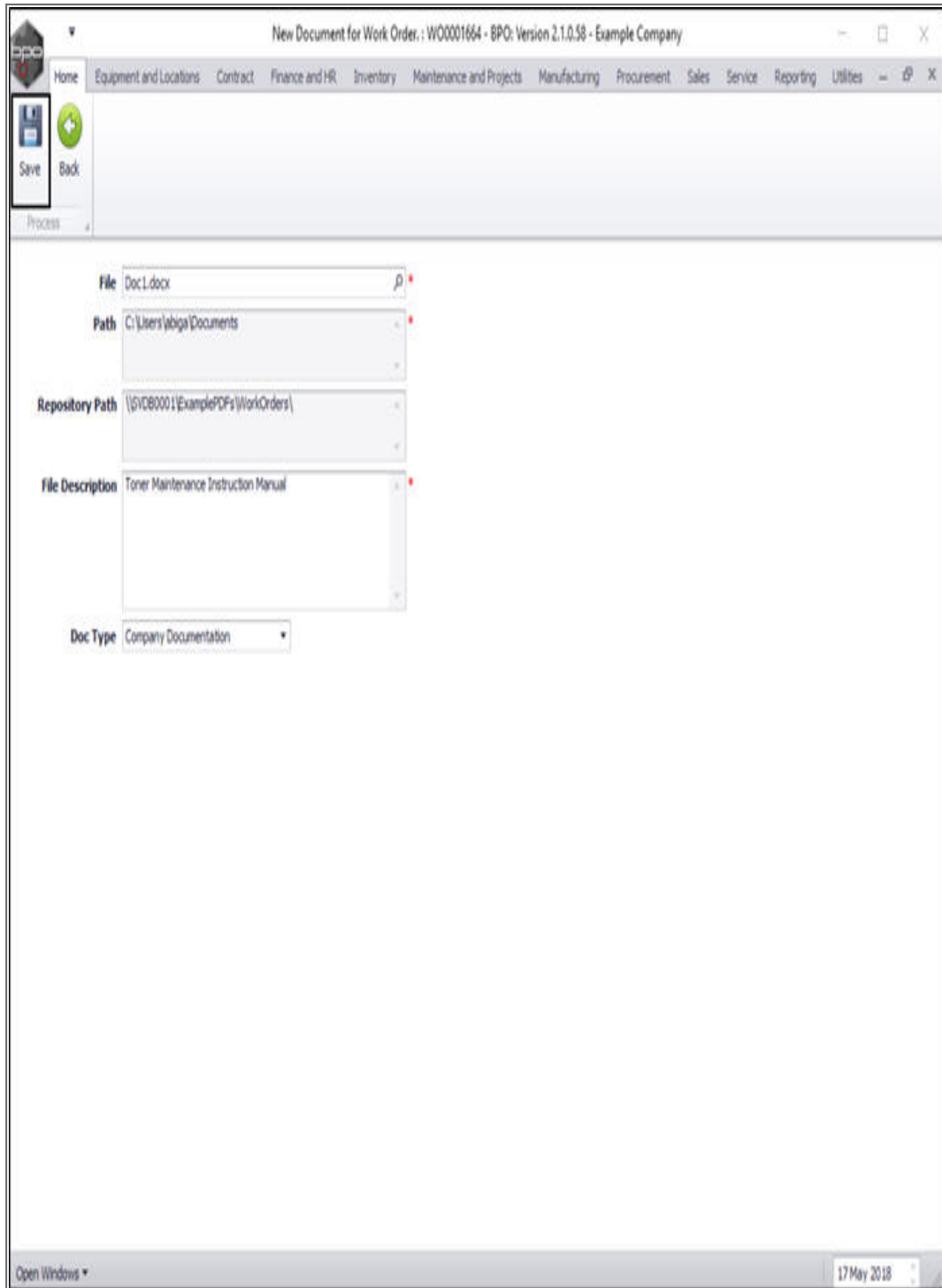
Repository Path \\SYDB0001\ExamplePDFs\WorkOrders

File Description

Doc Type

Open Windows 17 May 2018

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



New Document for Work Order : WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Save Back

Process

File Doc1.docx

Path C:\Users\ybiga\Documents

Repository Path \\SYDB0001\ExamplePDFs\WorkOrders

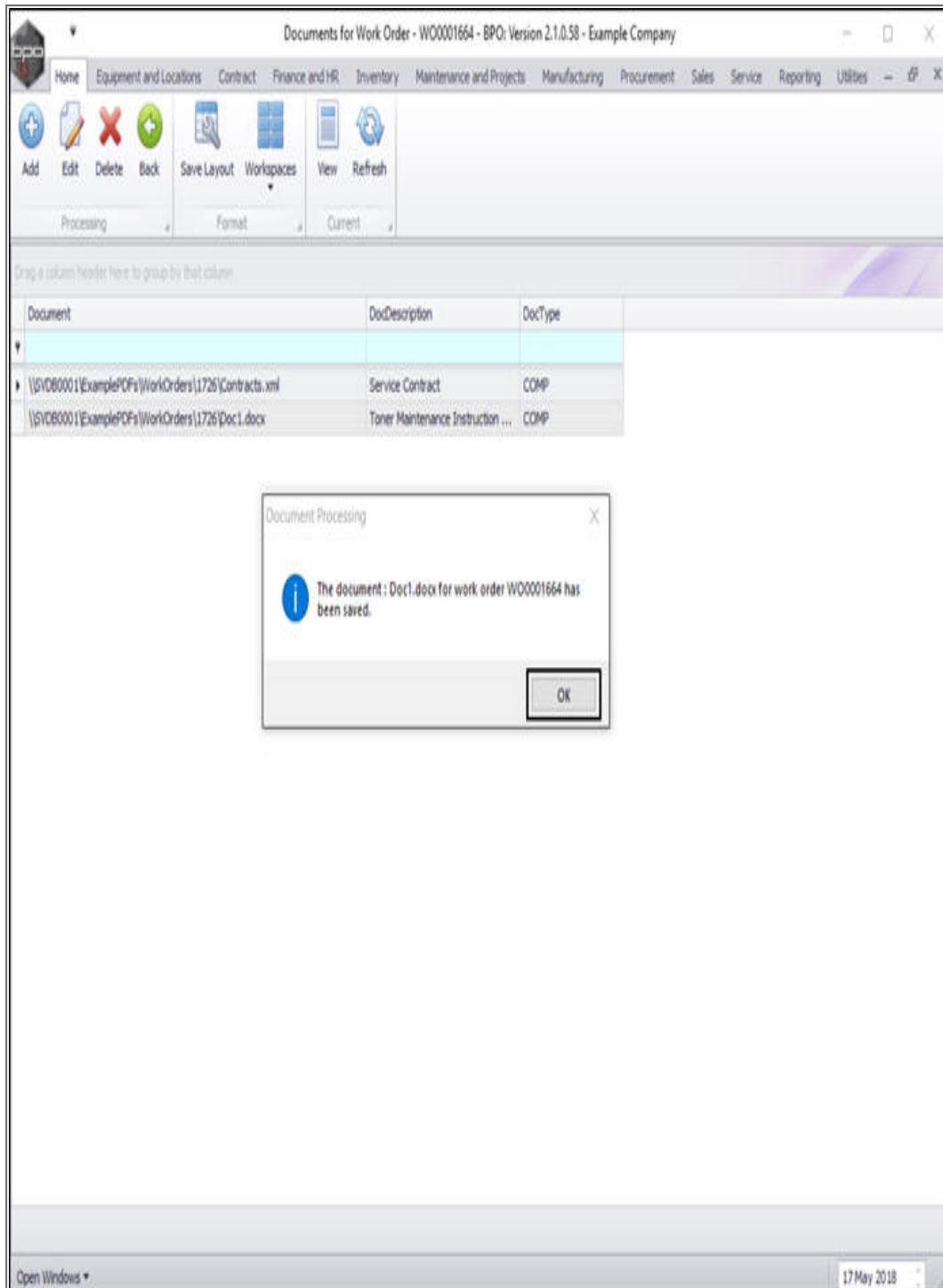
File Description Toner Maintenance Instruction Manual

Doc Type Company Documentation

Open Windows 17 May 2018

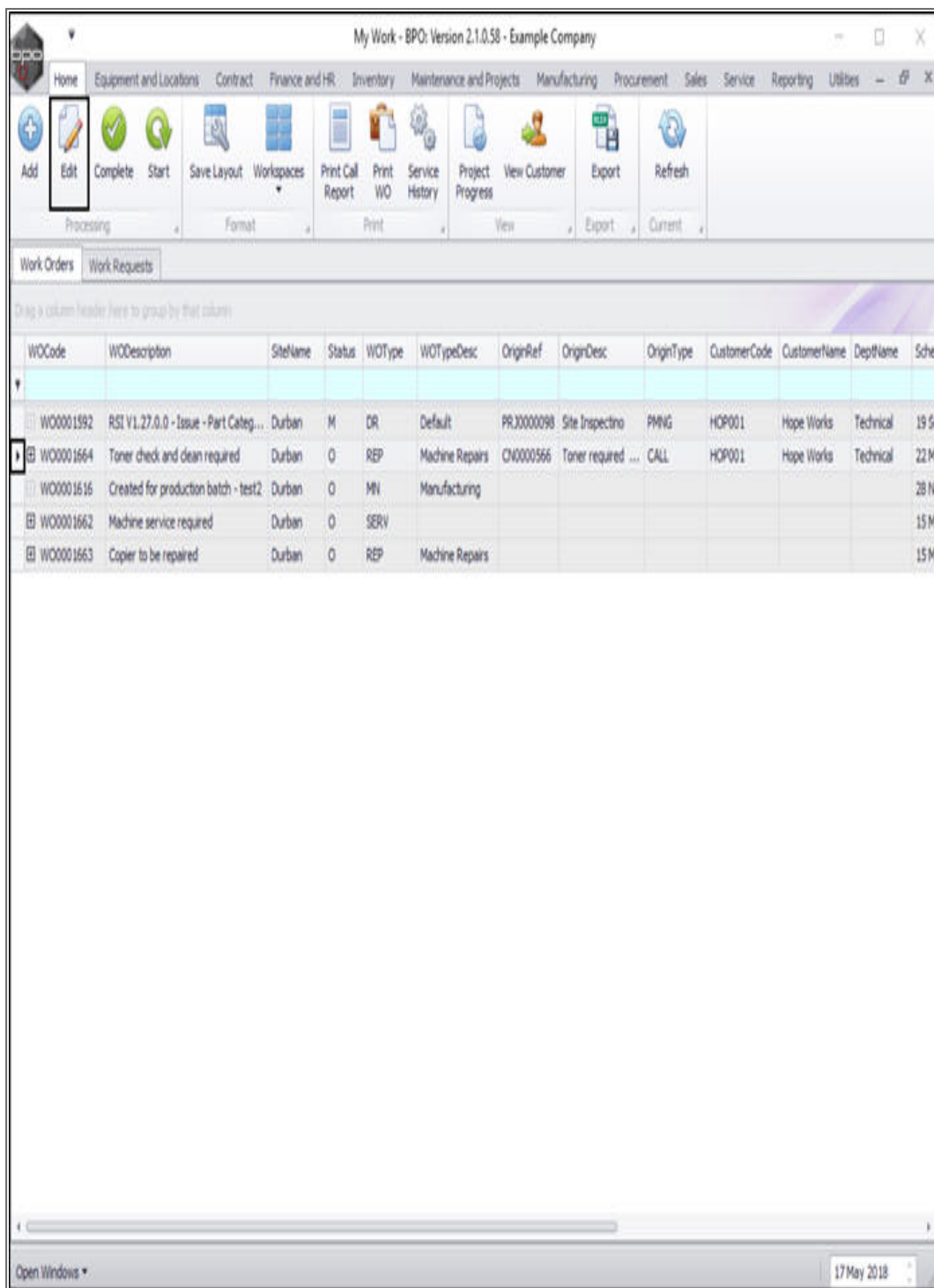
- A **Document Processing** message box will pop up informing you that;

- The document: [] for work order [] has been saved.
- Click on **OK**.



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**.



| WOCode | WODescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName | DeptName | Schedule |
|-----------|---------------------------------------|----------|--------|--------|-----------------|------------|--------------------|------------|--------------|--------------|-----------|----------|
| WO0001592 | RSL V1.27.0.0 - Issue - Part Categ... | Durban | M | DR | Default | PRJ0000098 | Site Inspectio | PMNG | HOP001 | Hope Works | Technical | 19 Sep |
| WO0001664 | Toner check and clean required | Durban | O | REP | Machine Repairs | ON0000566 | Toner required ... | CALL | HOP001 | Hope Works | Technical | 22 May |
| WO0001616 | Created for production batch - test2 | Durban | O | MN | Manufacturing | | | | | | | 28 May |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | | | 15 May |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | | | 15 May |

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

- Click on the **Documents** tile.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Swap Out

Meters

Expenses

Travel 1

Documents

Warranties Issued

Instructions

Images

Meters

Open Windows

17 May 2018

Description: Toner check and clean required

Requestor: Abigal Mine

WO Type: Repair

Priority: 2

Request Date: 18 May 2018 09:42:59

Status: Open

Billable: ☐

Capitalise: ☐

Work Order Item

Functional Location: Equipment

Item: 2020-103053

Comment: Check Colour Toner - not printing effectively

Links:

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | CN0000566 |
| PMNG | Project Reference | |

Schedule:

Assigned To: Abigal Mine

Assigned By: Abigal Mine

Scheduled Start: 22 May 2018 00:00:00

Scheduled End: 22 May 2018 02:00:00

Actual Start: 17 Jun 2018 00:00:00

Actual End: 17 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

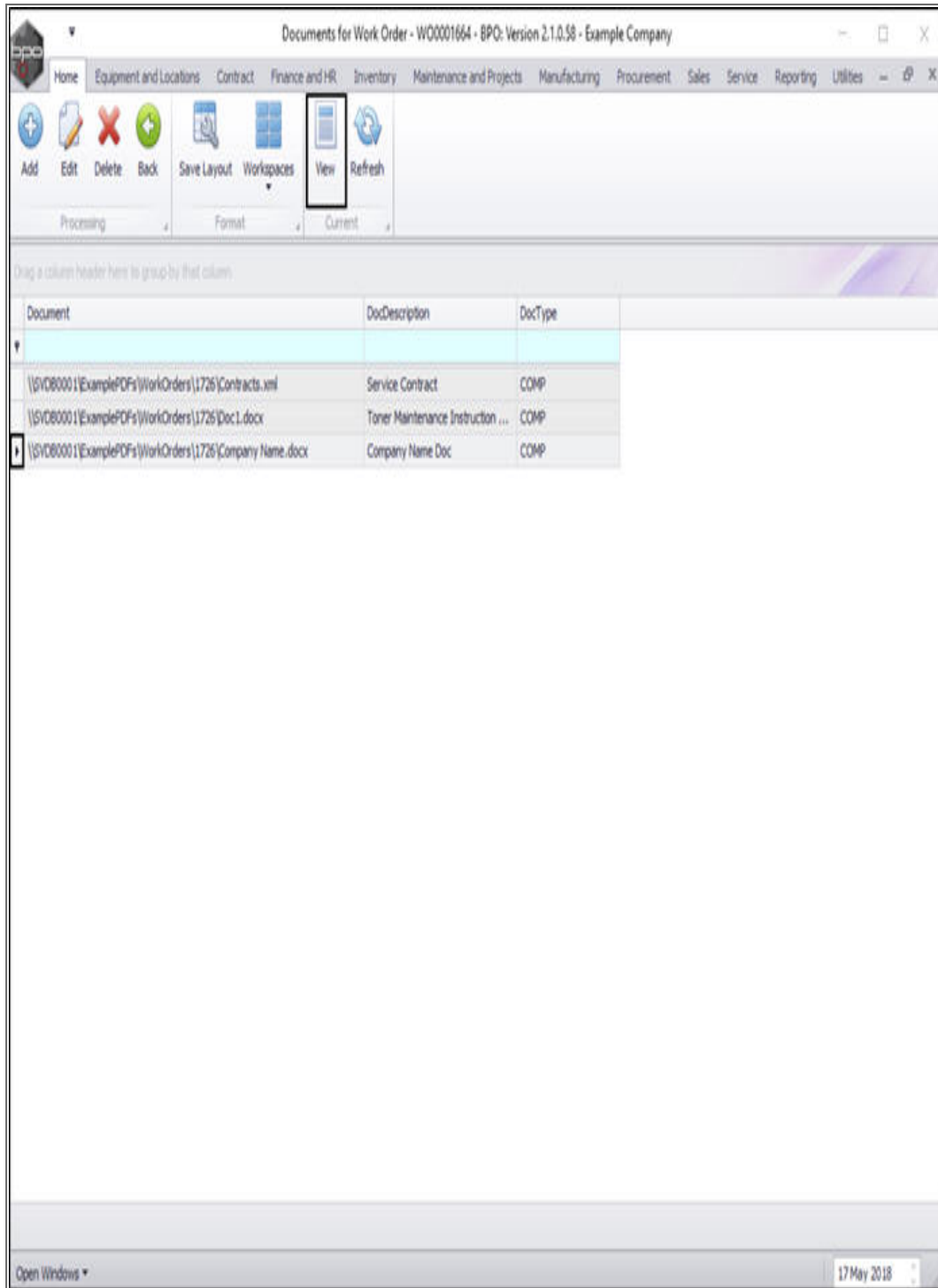
Rectification Code:

Rectification Comments:

Completion Date: 17 Jun 2018 00:00:00

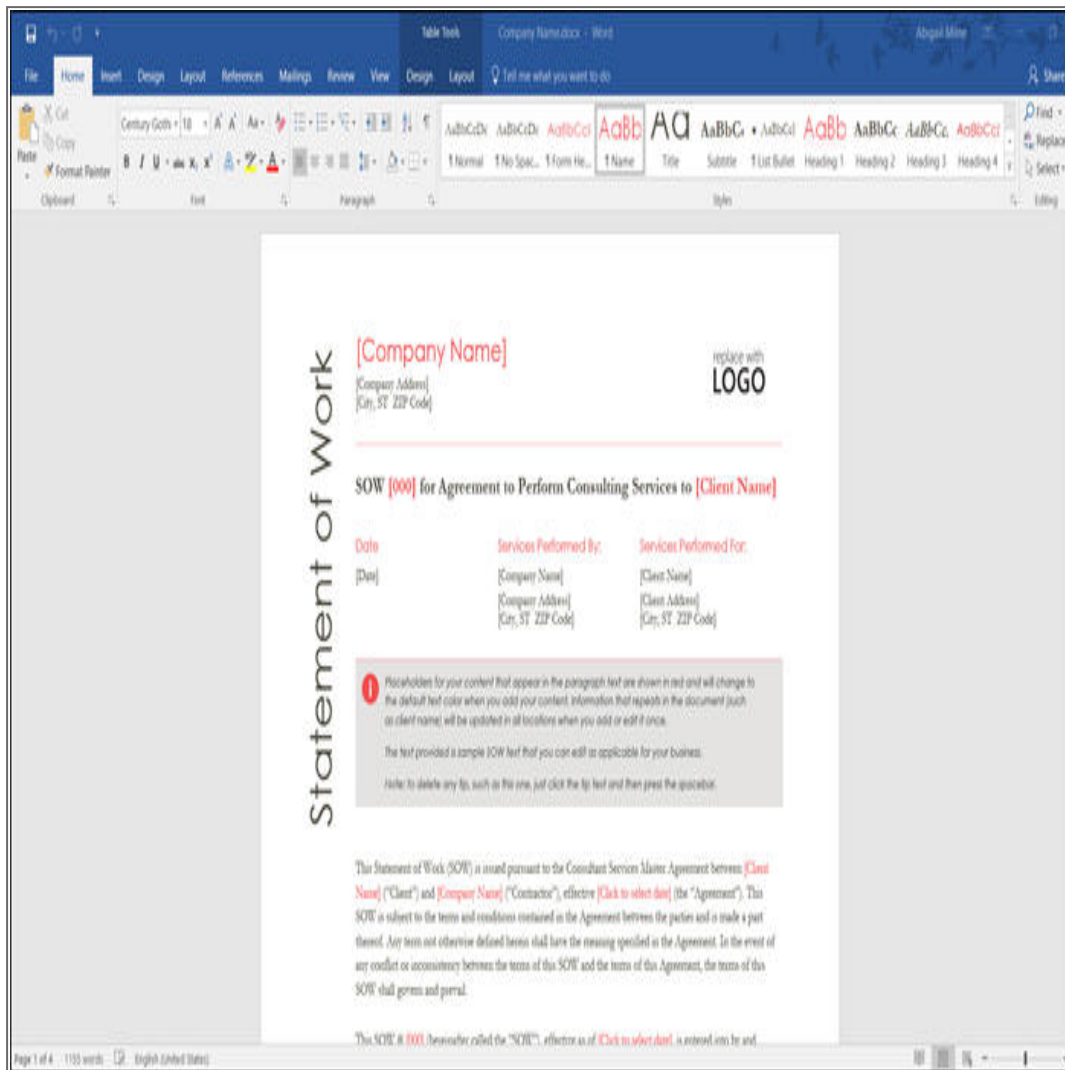
The **Documents for Work Order - []** screen will be displayed.

- 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**.



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

Reader.



MNU.073.009

