

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

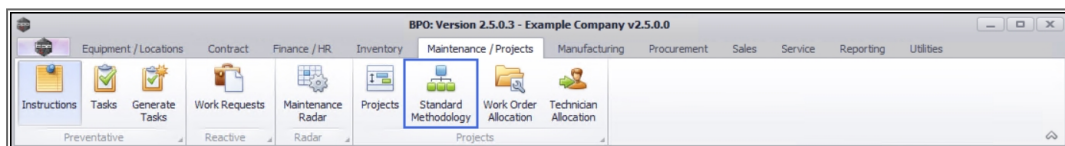
PROJECTS

STANDARD METHODOLOGY – DOCUMENTS

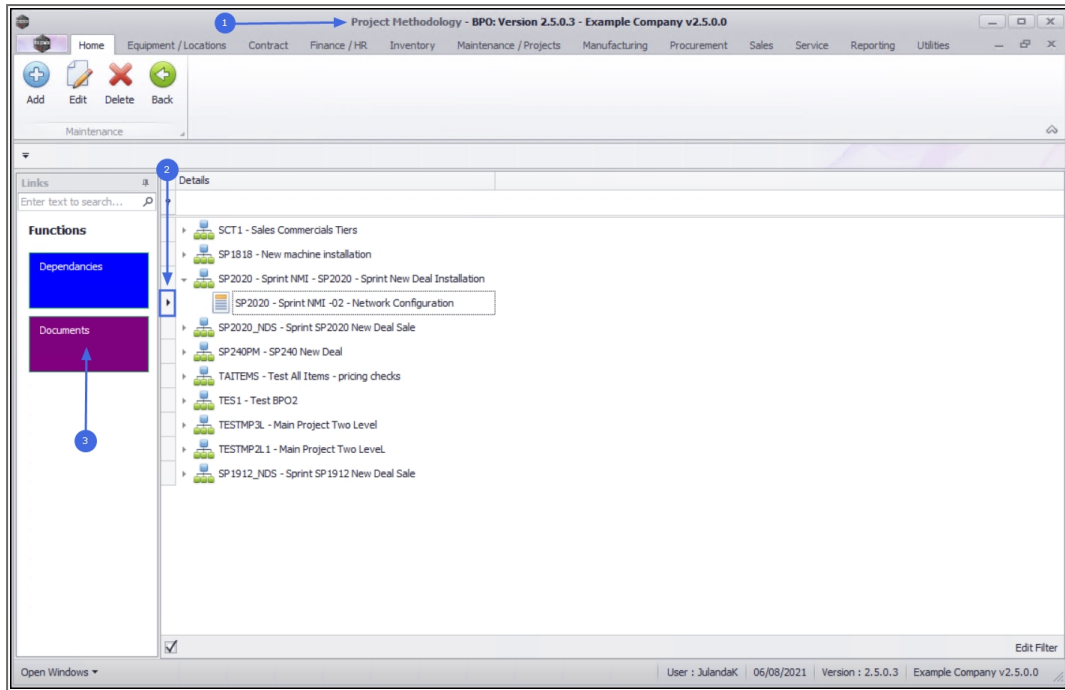
The **Documents** tile allows you to link, view or delete digital documents effortlessly. All the project documents are kept in one place by making use of this link.

These documents need to be saved in a shared folder on the server.

Ribbon Access: Maintenance / Projects> Standard Methodology



1. The **Project Methodology** screen will be displayed.
2. Select the **row** of the project layer you need to link document(s) to.
3. Click on the **Documents** tile.



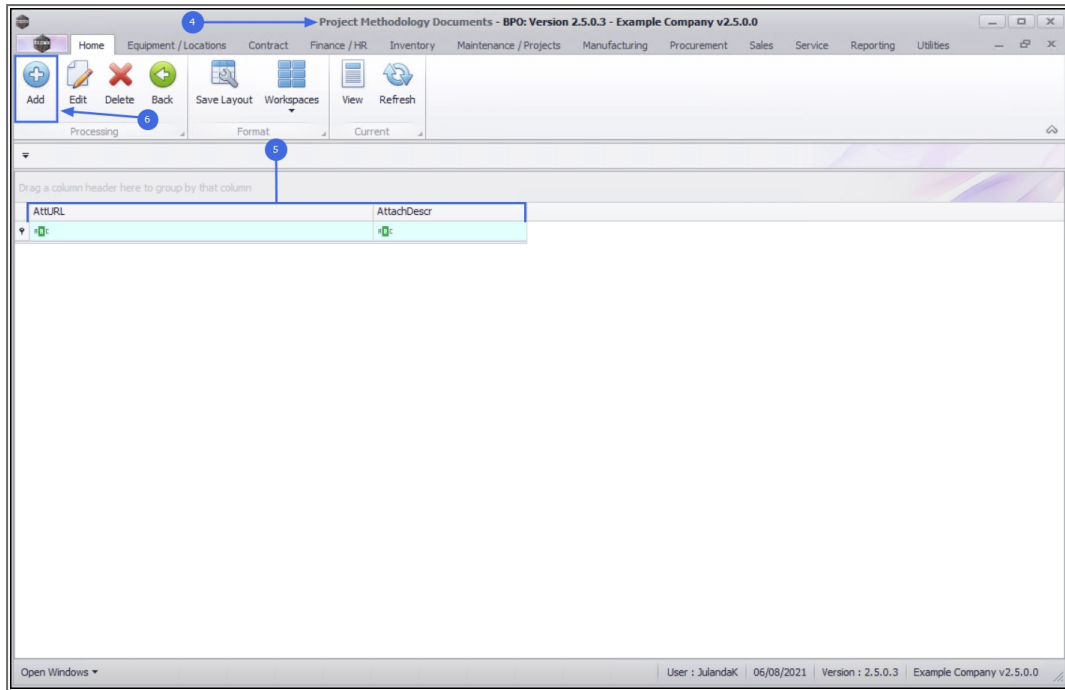
4. The **Project Methodology Documents** screen will be displayed.
5. A list of documents currently linked to the project layer will display.

LINK DIGITAL DOCUMENT

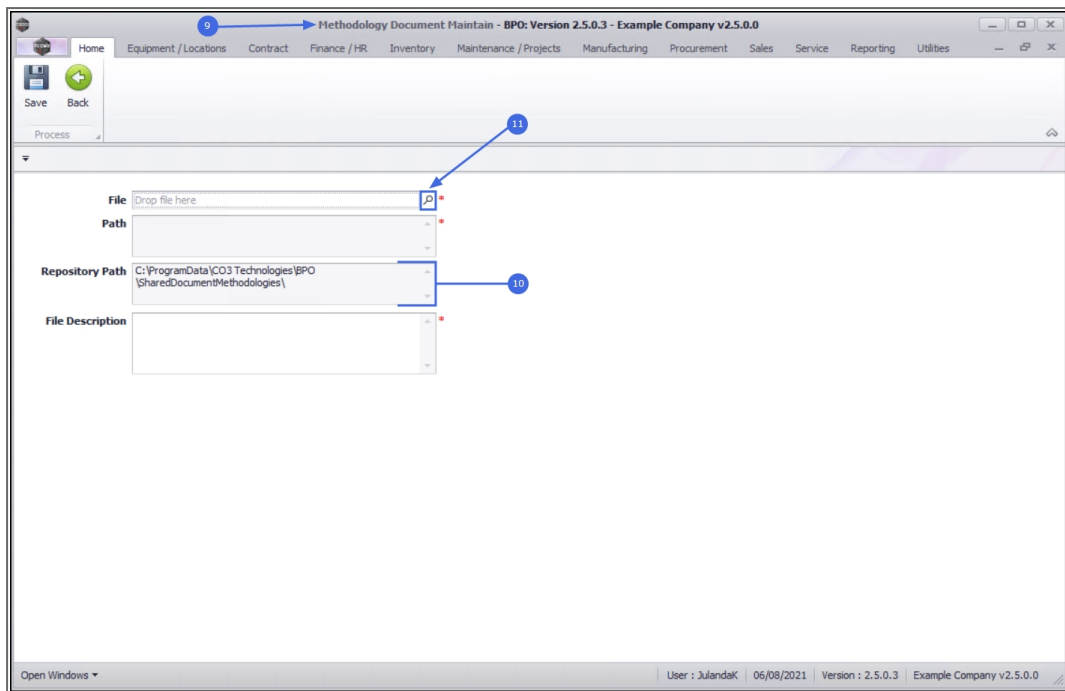
4. Click on **Add**.



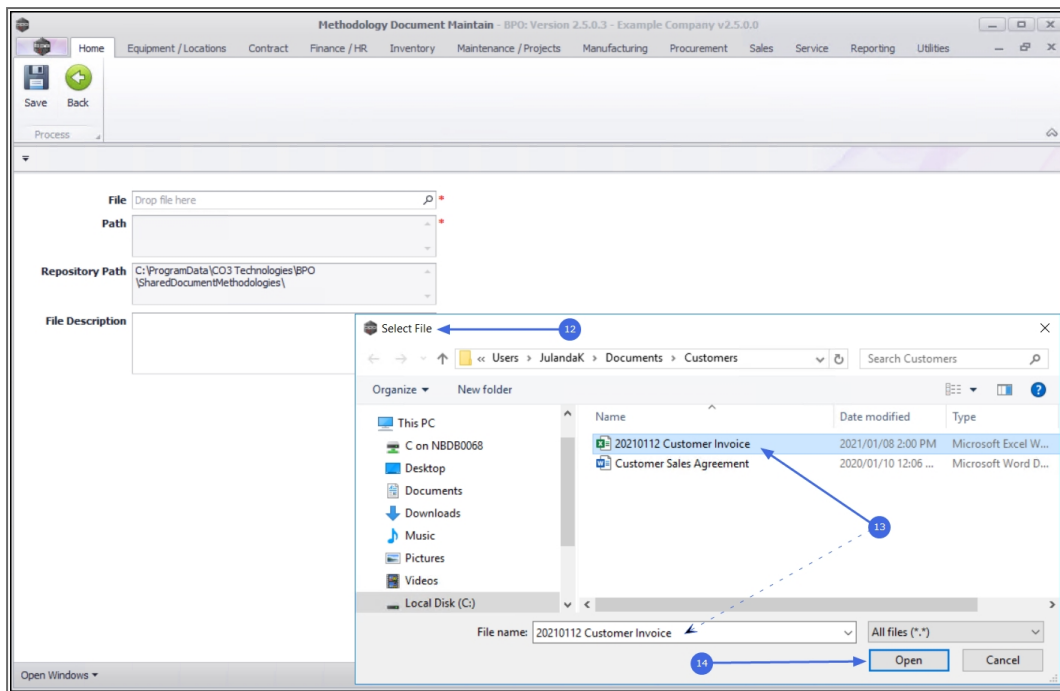
Short cut key: Right click to display the **Process** menu list. Click on **Add**.



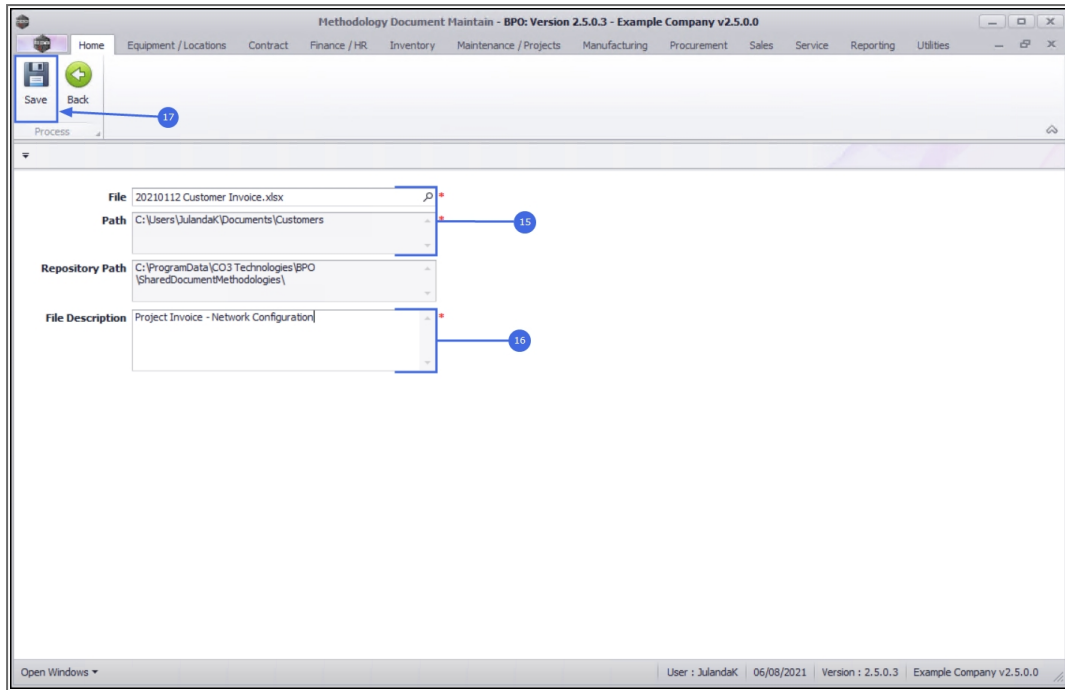
9. The **Methodology Document Maintain** screen will be displayed.
10. **Note** that the Repository Path field is populated with what has been configured on your system.
11. Click on the **search** button in the **File** field.



12. From the **Select File** screen will display,
13. Locate 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.
14. Click on **Open**.



15. The **File** and **Path** fields will be populated with the details of the selected document.
16. Type a **description** of the document in the **File Description** field.
17. Click on **Save** to save the link.



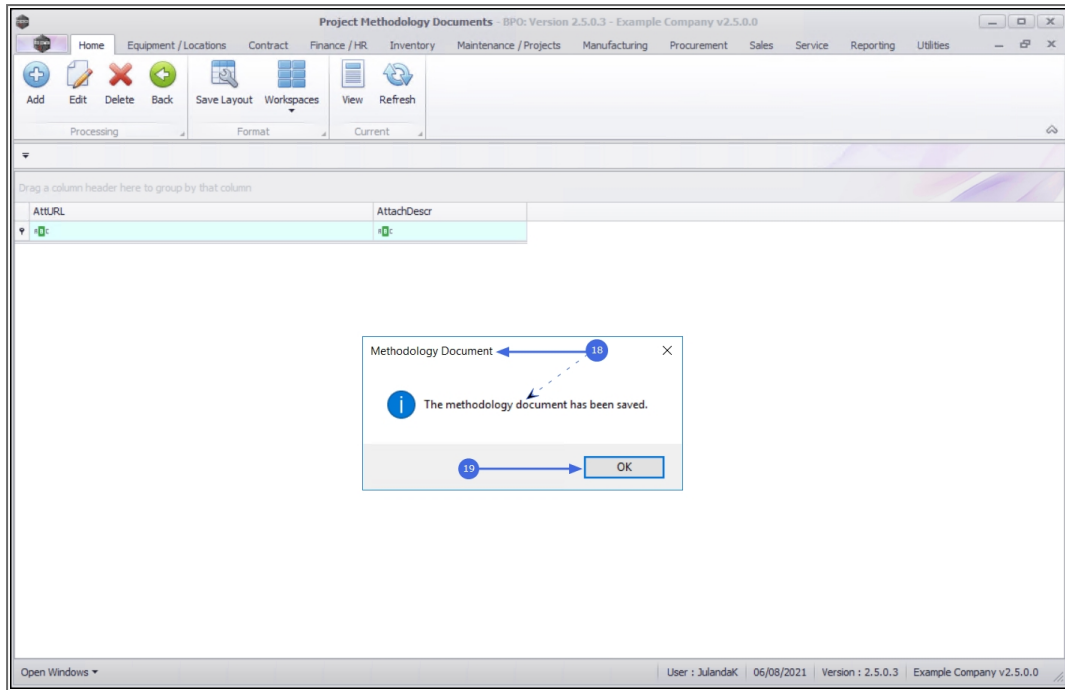
18. When you receive the **Methodology Document** message confirming that;

- The methodology document has been saved.

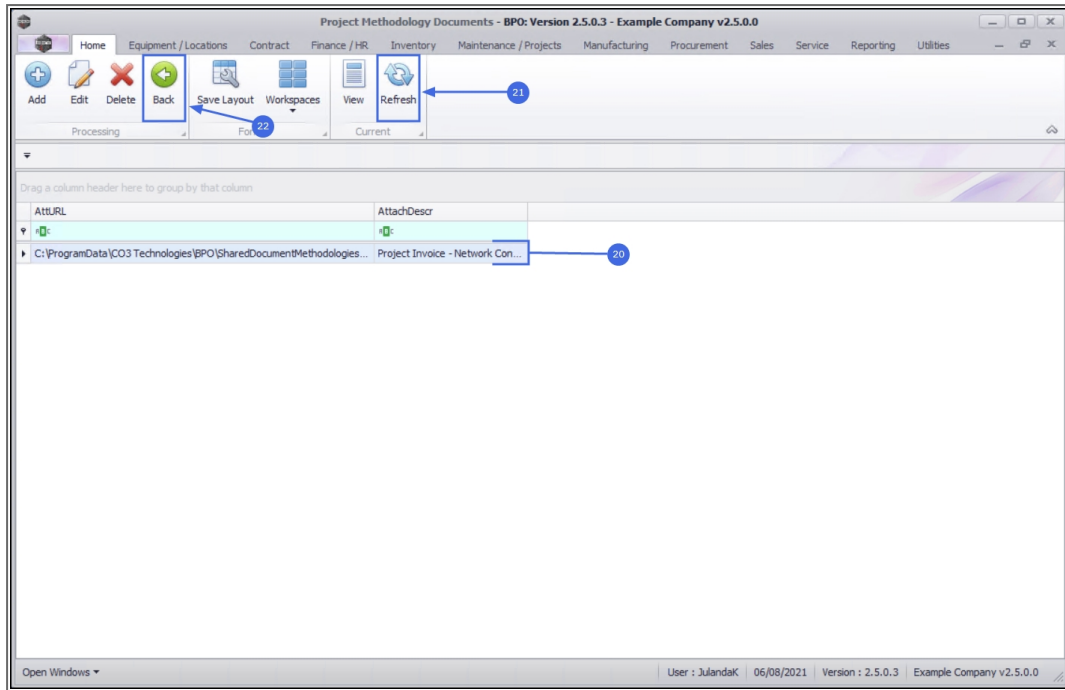
19. Click on **OK**.



Note that BPO does not save the physical document, but a link to where the document has been saved.



20. The **Projects Methodology Documents** screen has been updated with the document you have linked.
21. Click on **Refresh** to update your screen, if required.
22. Click **Back** to return to the **Project Methodology** Screen.

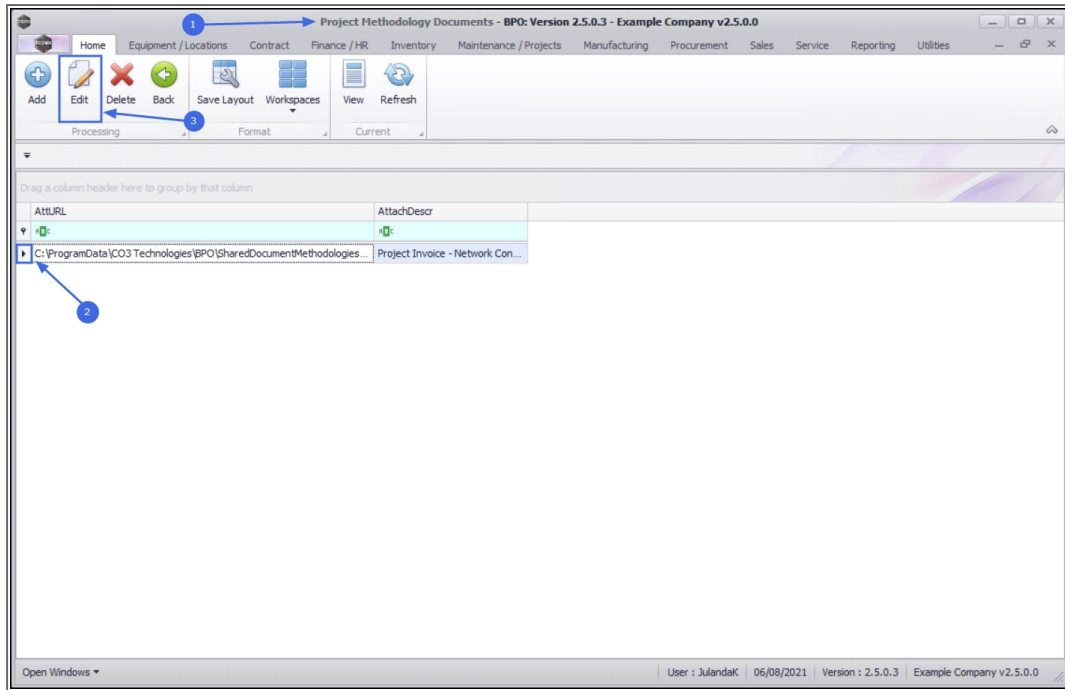


EDIT DIGITAL DOCUMENTS

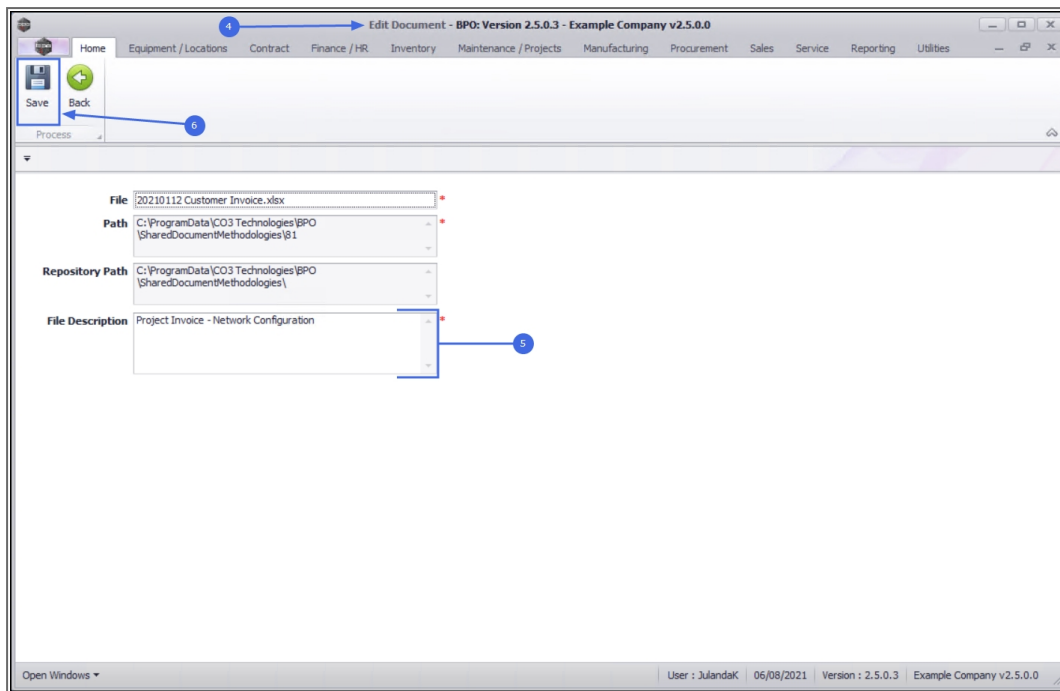
1. From the **Project Methodology Documents** screen,
2. Click on the **row** of the document you wish to edit.
3. Click on **Edit**.



Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.



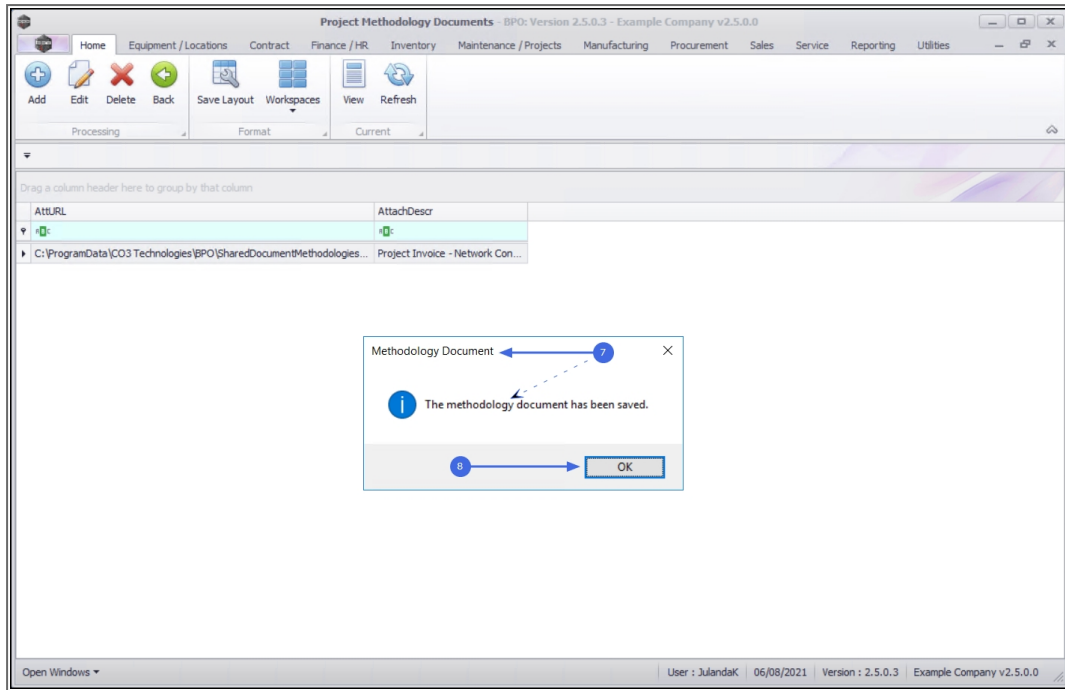
4. The **Edit Document** screen will be displayed with the selected file information populating the fields.
5. Update the **File Description** field as required.
6. Click on **Save**.



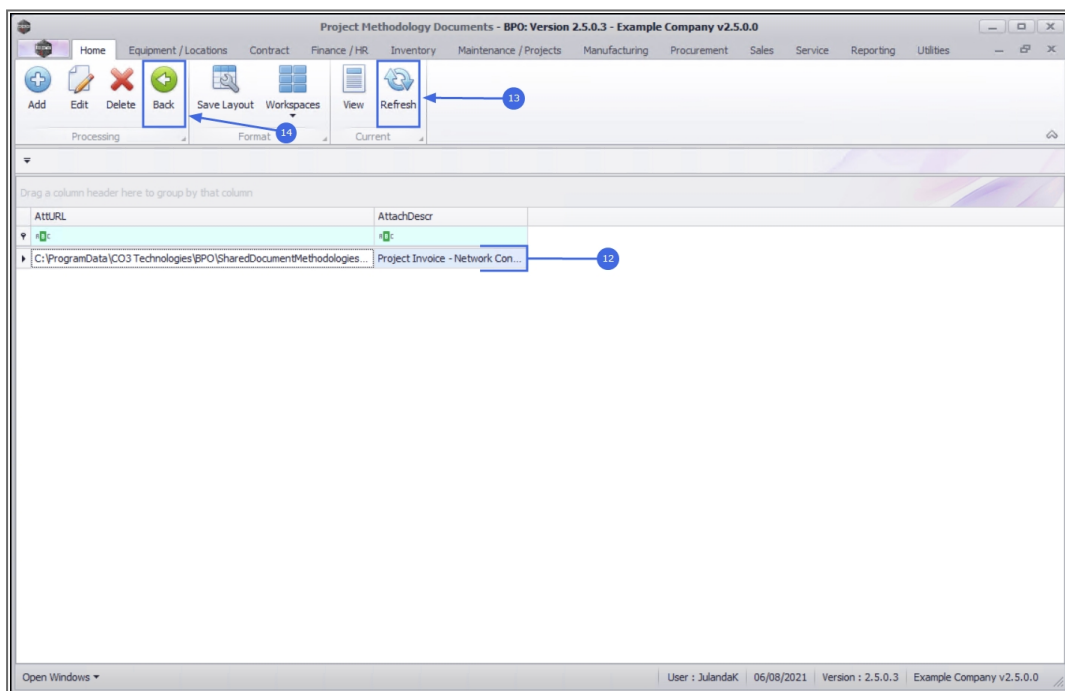
7. When you receive the **Methodology Document** confirmation message;
 - **The methodology document has been saved.**
8. Click on **OK**.



Note that BPO does not save the physical document, but a link to where the document has been saved.



9. The **Project Methodology Documents** screen has been updated.
10. Click on **Refresh** to update your screen, if required.
11. Click **Back** to return to the **Project Methodology** Screen.

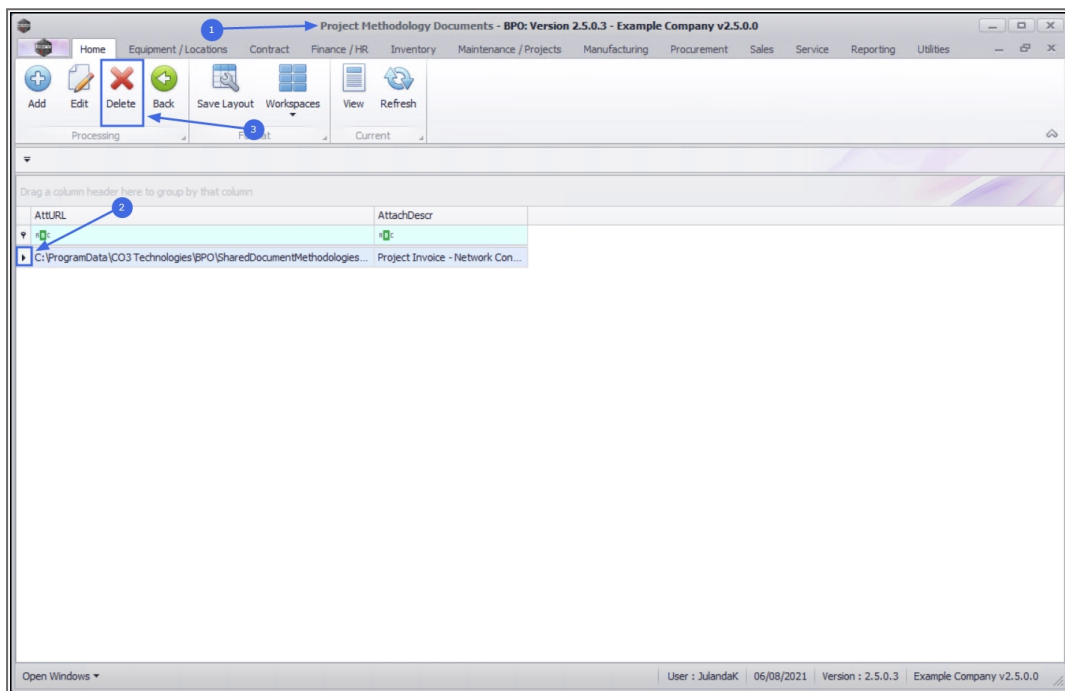


DELETE DIGITAL DOCUMENT

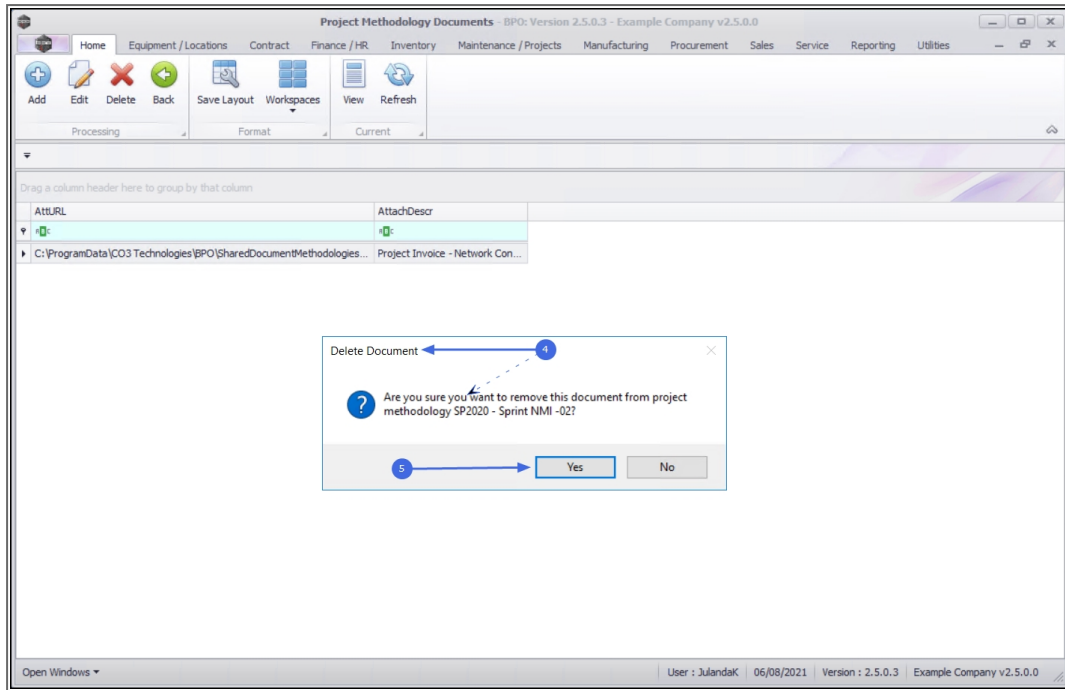
1. From the **Project Methodology Documents** screen,
2. Select the **row** of the document you wish to remove from the project methodology layer.
3. Click on **Delete**.



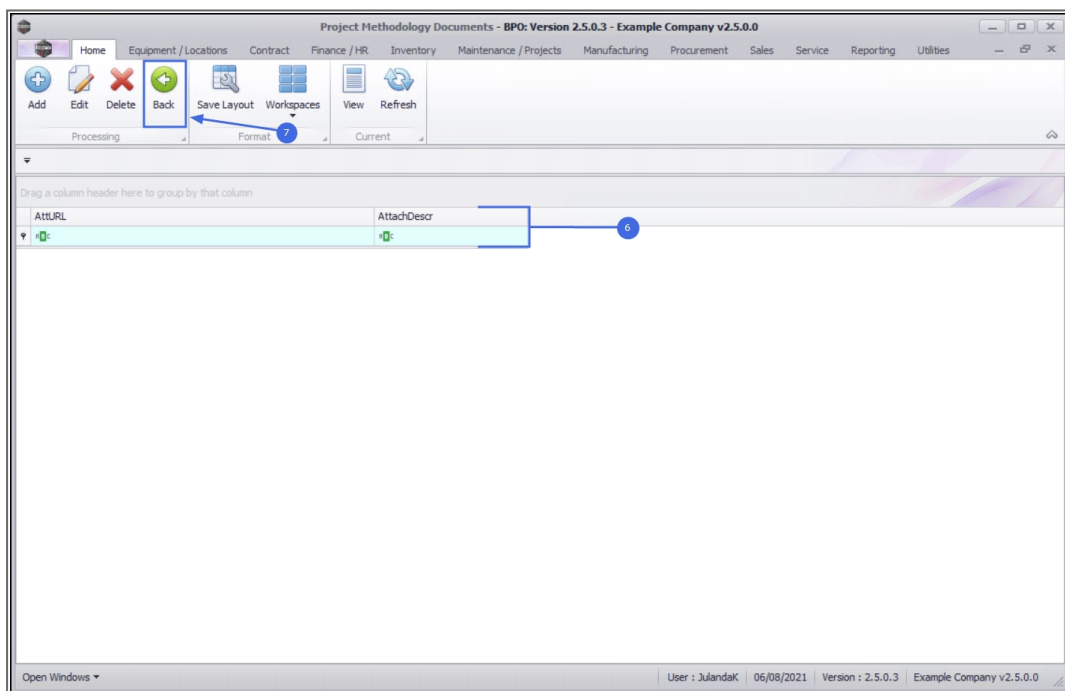
Short cut key: Right click to display the **Process** menu list. Click on **Delete**.



4. When you receive the **Delete Document** message to confirm;
 - **Are you sure you want to remove this document from project methodology [proj methodology]?**
5. Click on **Yes**.

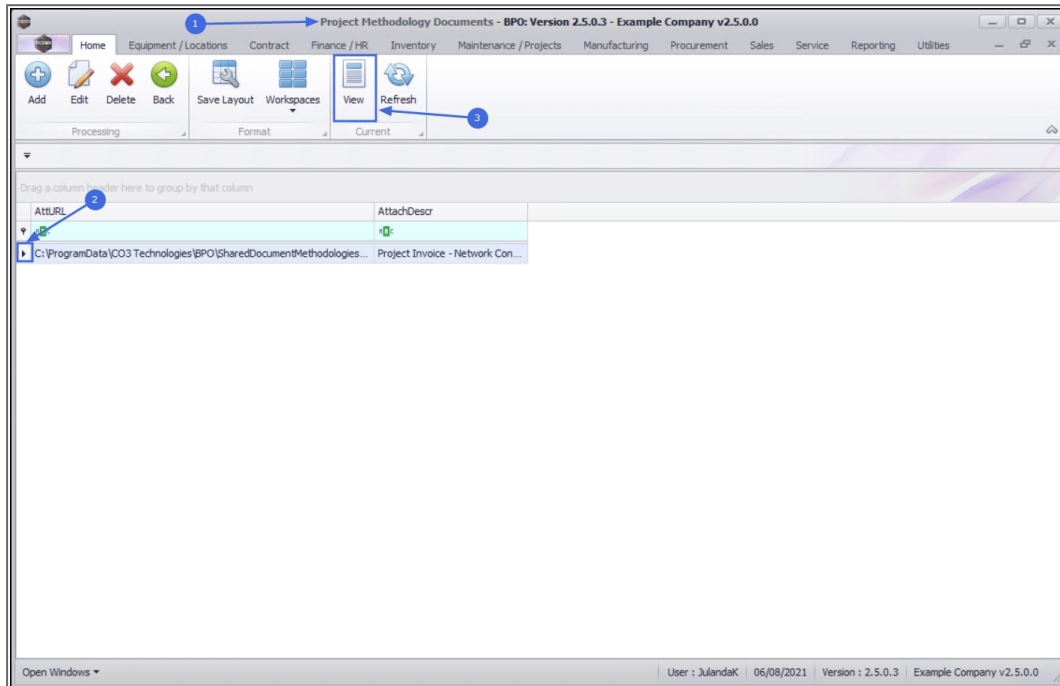


6. The document has now been **deleted** from the **Project Methodology Documents** screen.
7. Click on **Back** to return to the **Project Methodology** Screen.



VIEW DOCUMENTS

1. From the **Project Methodology Documents** screen,
2. Click on the **row** of the document you wish to view.
3. Click on **View**.



4. The digital document will open within the relevant program for you to view.
 - In this example, an **Excel** document has opened.
5. When you have finished reviewing the document, **close** the document screen that you are in, to return to the **Project Methodology Documents** screen.

20210112 Customer Invoice - Excel

Abigail Milne

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

Clipboard Font Alignment Number Styles Cells Editing

SECURITY WARNING Automatic update of links has been disabled Enable Content

Comments: Upgrading database to use Print service to Version 6

Company Name	Project Number
Company Contact Person	Work Order Number
Contact Number	Team
Tech Assigned	

Instance name	Database Name	Evo Database Name	Upgrade/Modification	Current BPO Version	BPO_V2	Tech Current

Upgrade Form Companion App Check List

115%

MNU.153.016

