MAINTENANCE

INSTRUCTIONS – ADD / EDIT / DELETE AND VIEW DIGITAL DOCUMENTS
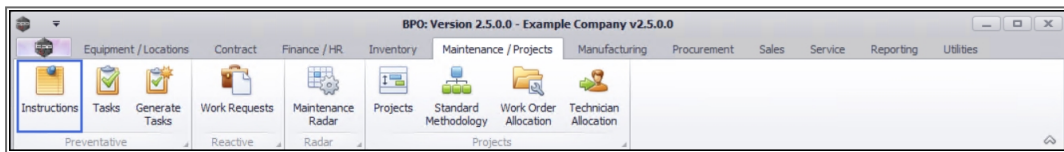
You can scan in and link documents relating to the <u>task instruction</u>.

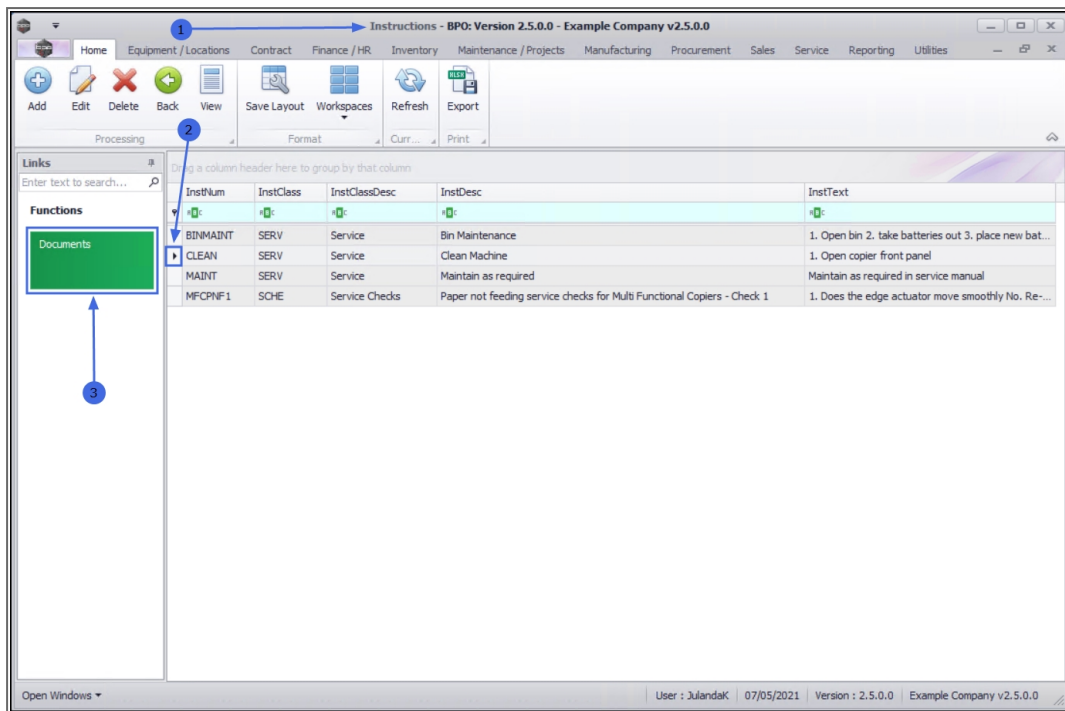Remember that these documents need to be saved on the server in a shared folder.

Ribbon Access: *Maintenance / Projects > Instructions*

1. The *Instructions* listing screen will be displayed.
2. Click on the *row* of the instruction you wish to link a digital document to.
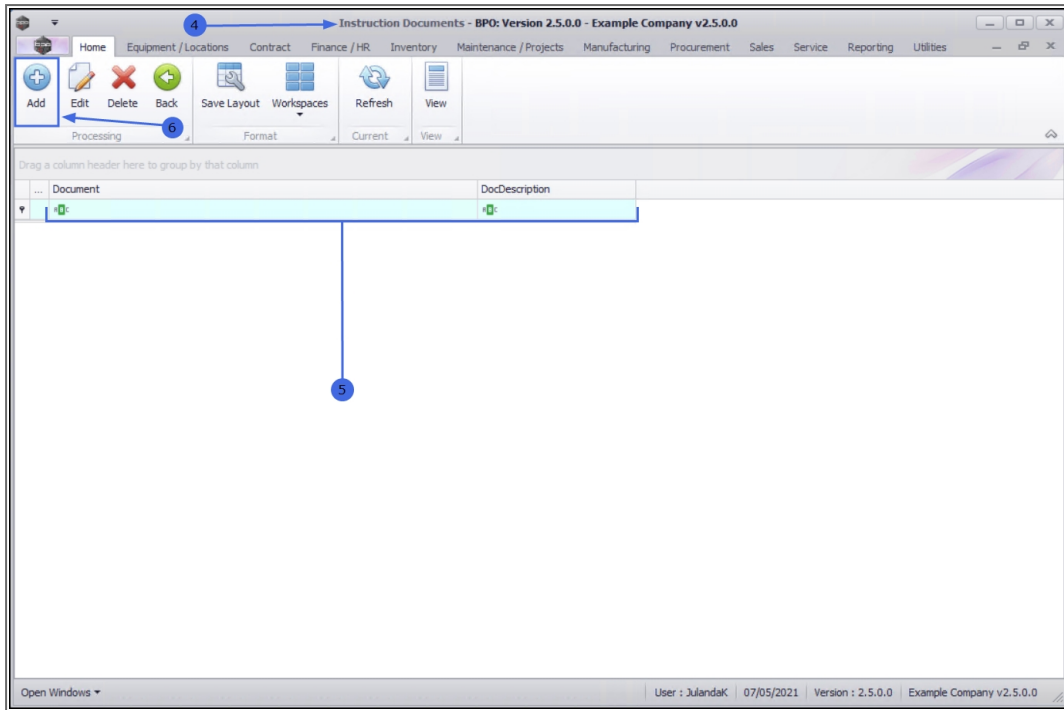3. Click on the *Documents* tile.

ADD A DIGITAL DOCUMENT

4. The *Instruction Documents* screen will be displayed.
5. From this screen you can **view** a list of the documents (if any) that are linked to this instruction.
6. Click on *Add*.

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

7. The *Instruction Document Maintain* screen will be displayed.
8. Click on the *search* button in the *File* text box to display the *Select File* screen.
9. *Search* for and *select* the document that you wish to link to this instruction.

> ⚠ Important to remember that the document needs to be saved on the server in a shared folder.

10. Click on *Open*.
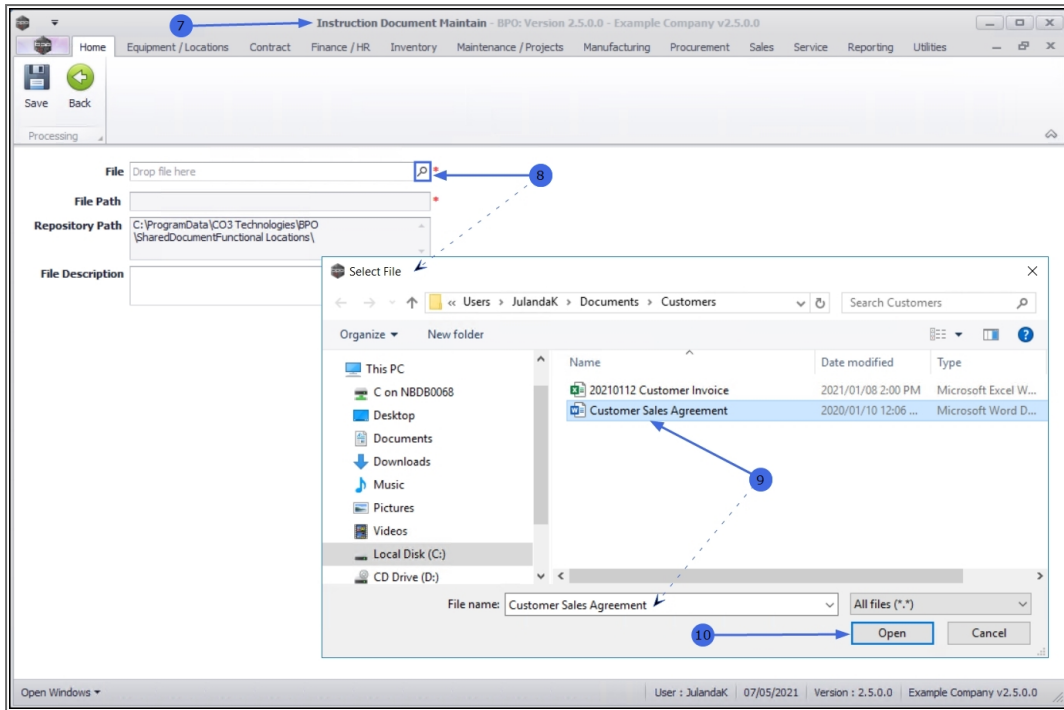
FILE LOCATION DETAILS

- **File:** This field is populated with the selected *file name*.
- **File Path:** This field is populated with the selected *file path*.
- **Repository Path:** This field will populate with to the repository path set up in the Configurator.
- **File Description:** Click in the text box and type in a *description* for the document.

SAVE THE DOCUMENT LINK

6. When you have finished adding the document details, click on *Save*.
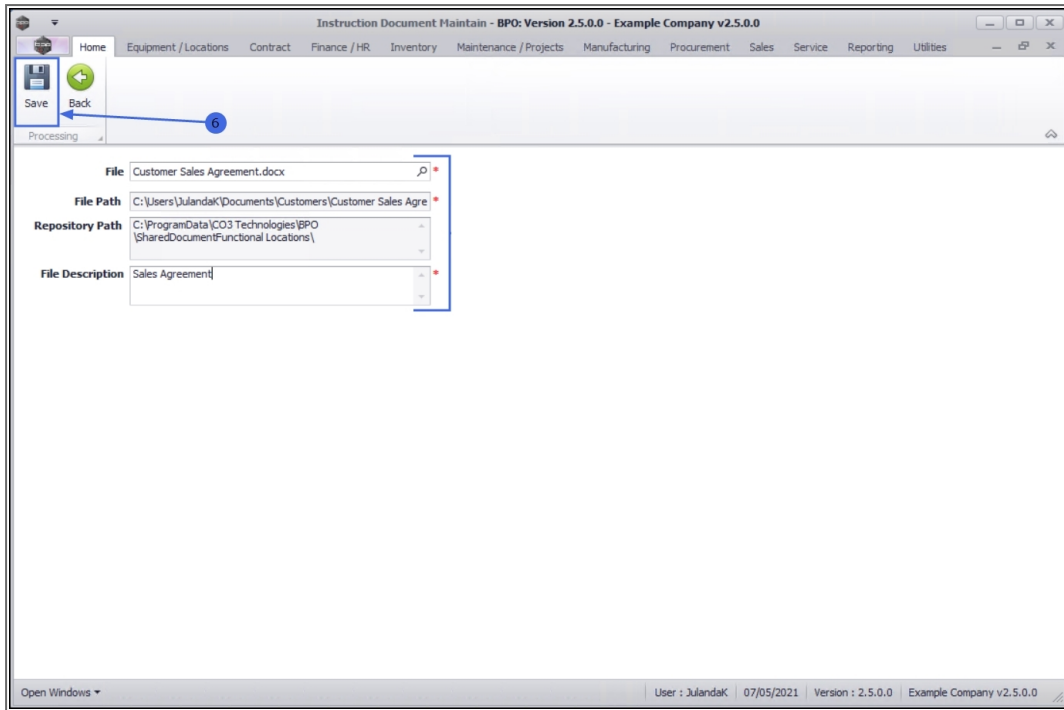
7. You will return to the *Instruction Documents* screen.
8. The *details* of the document you have *linked* to the Instruction can now be viewed.
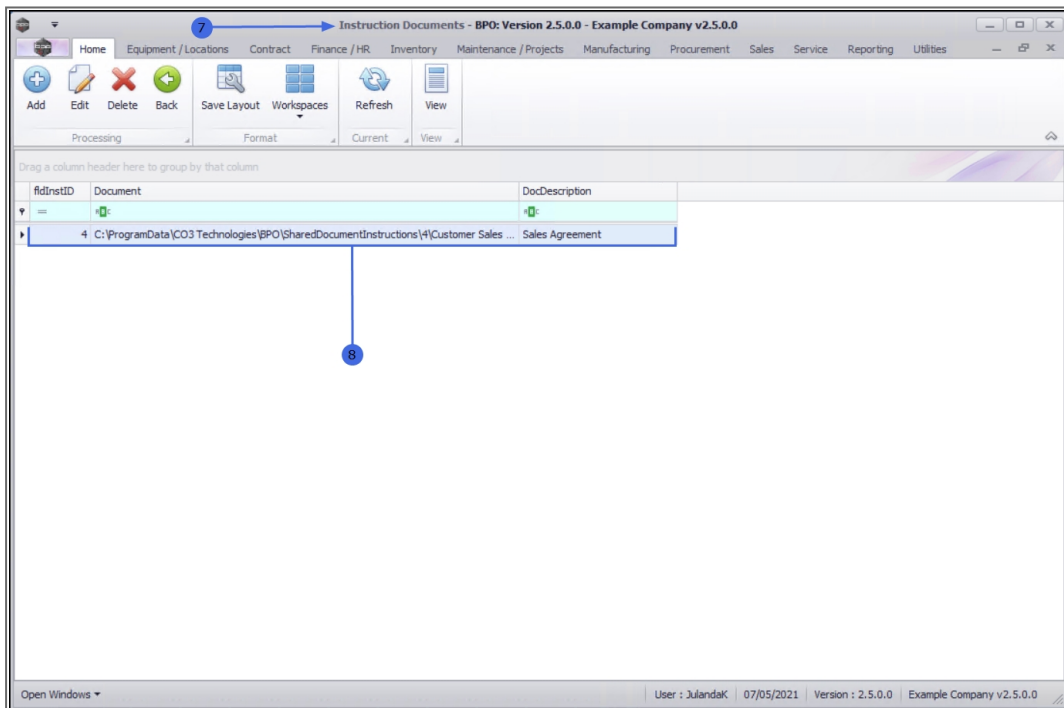
EDIT A LINKED DOCUMENT

The edit feature allows you to make changes only to the *File Description* of the linked document.

1. From the *Instruction Documents* listing 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*.
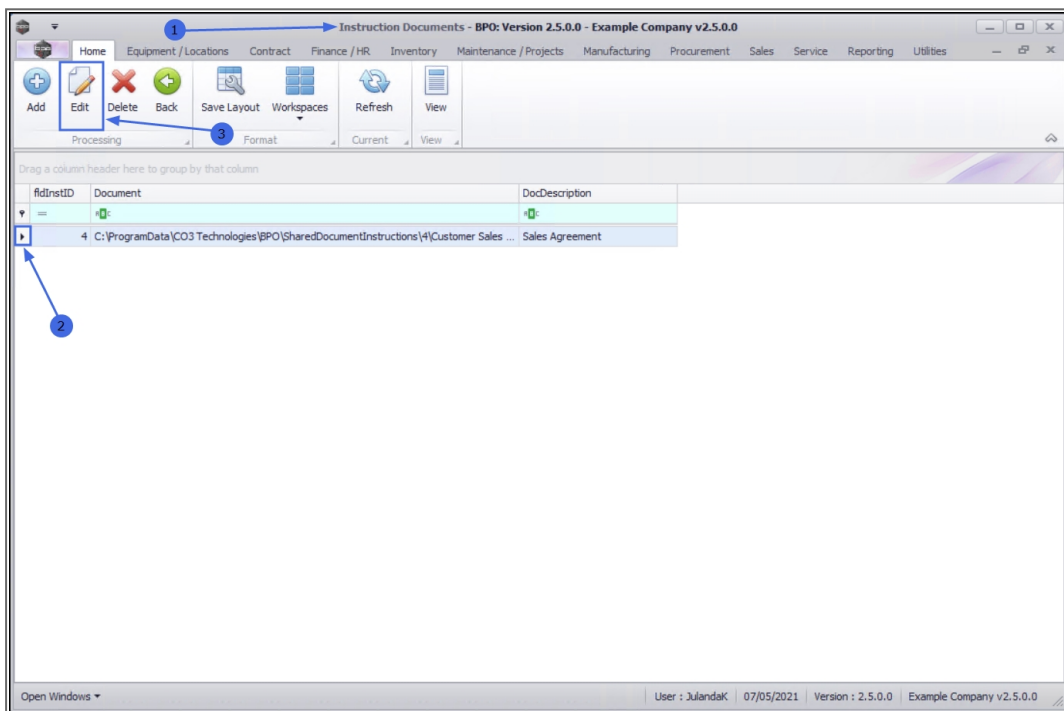
4. The *Instruction Document Maintain* screen will be displayed.
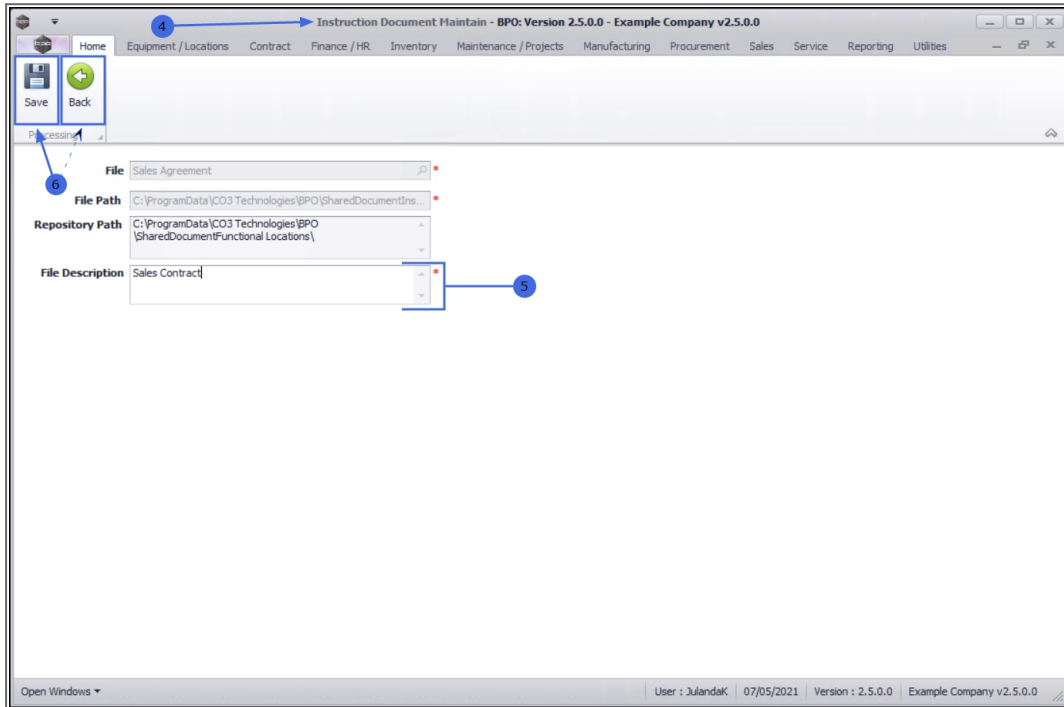
> Note that the fields for *File*, *File Path* and *Repository Path* have been greyed out indicating that they cannot be changed.

5. Make the required changes to the *File Description*.

SAVE THE CHANGES

6. Click on *Save* to save the change or
    - Click on *Back* to return to the Document listing screen without saving any changes.
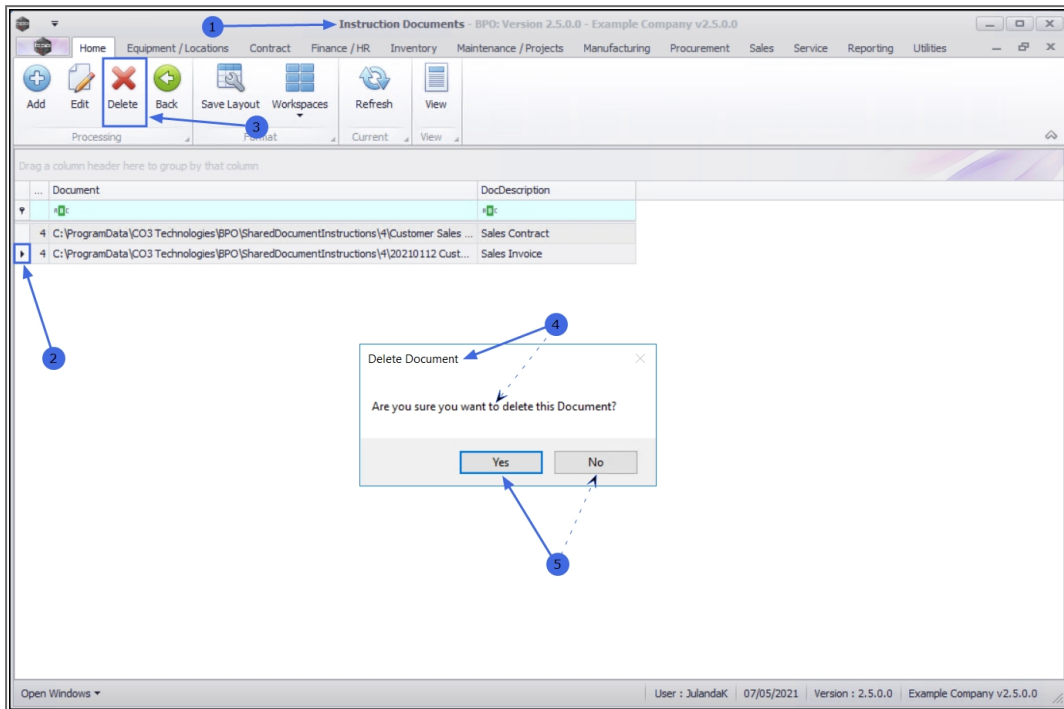

DELETE/REMOVE A LINKED FILE

1. From the *Instruction Documents* listing screen,
2. Click in the *row* of the document you wish to delete from the instruction.
3. Click on *Delete*.

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

4. When you receive the *Delete Document* message to confirm;
    - *Are you sure you want to delete this Document?*

5. Click on *Yes* *if you are certain about your selection*, or

    - Click on *No* to ignore the request and to leave the document on the Instruction Documents screen.

VIEW A LINKED DOCUMENT

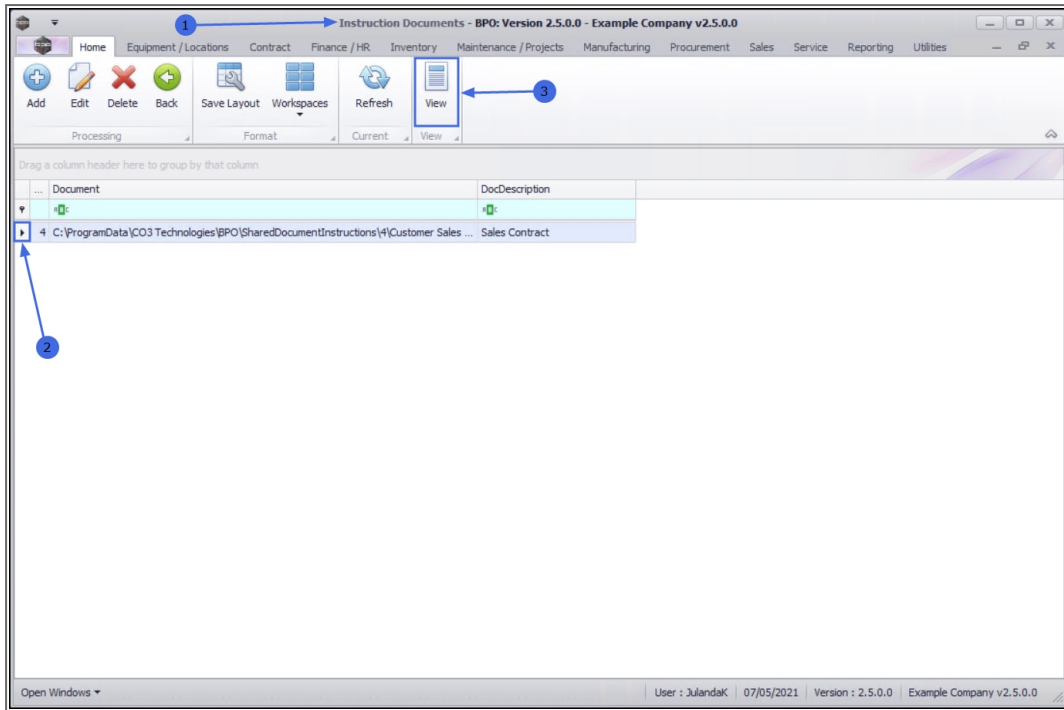The View feature allows you to view and edit the content of the linked document.

1. From the *Instruction Documents* listing screen.
2. Click in the *row* of the document you wish to view.
3. Click on *View*.

> Short cut key: *Right click* to display the *All groups* menu list. Click on *View*.
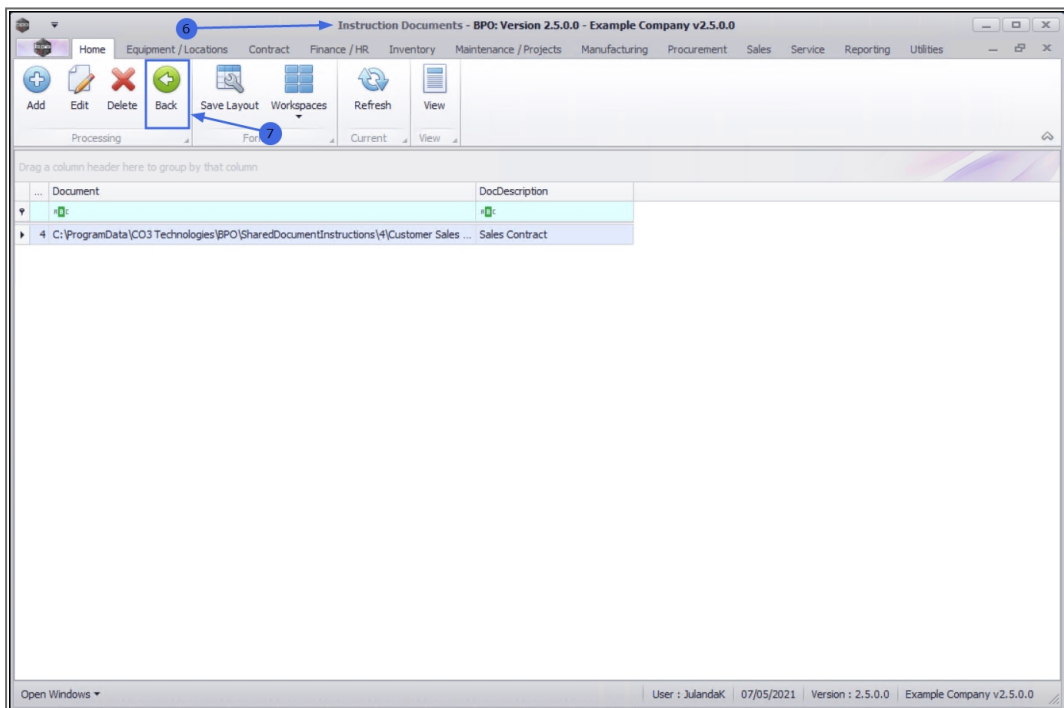
4. The document will open in the **_software format_** that it was created in, e.g Microsoft Word or Excel.

- The example has the Sales Contract saved as a Microsoft Word document.
- Make the necessary changes and **_save_** the document in Microsoft Word.

5. **_Close_** Word or Excel.
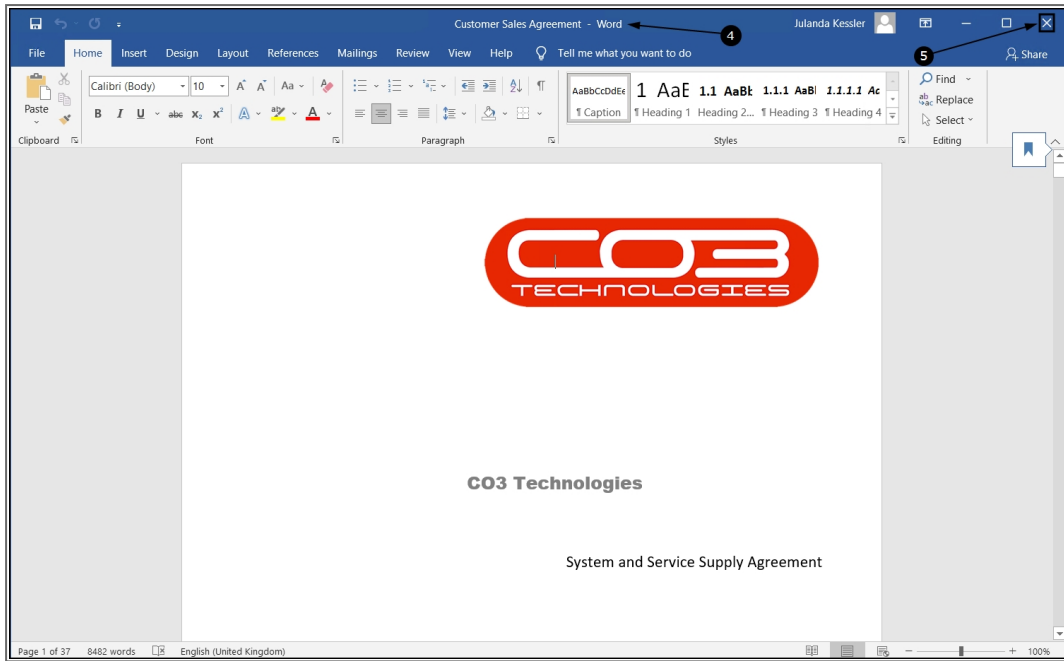
6. You will return to the *Instruction Documents* screen.
7. Click on *Back* to return to the Instructions listing screen.

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