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*

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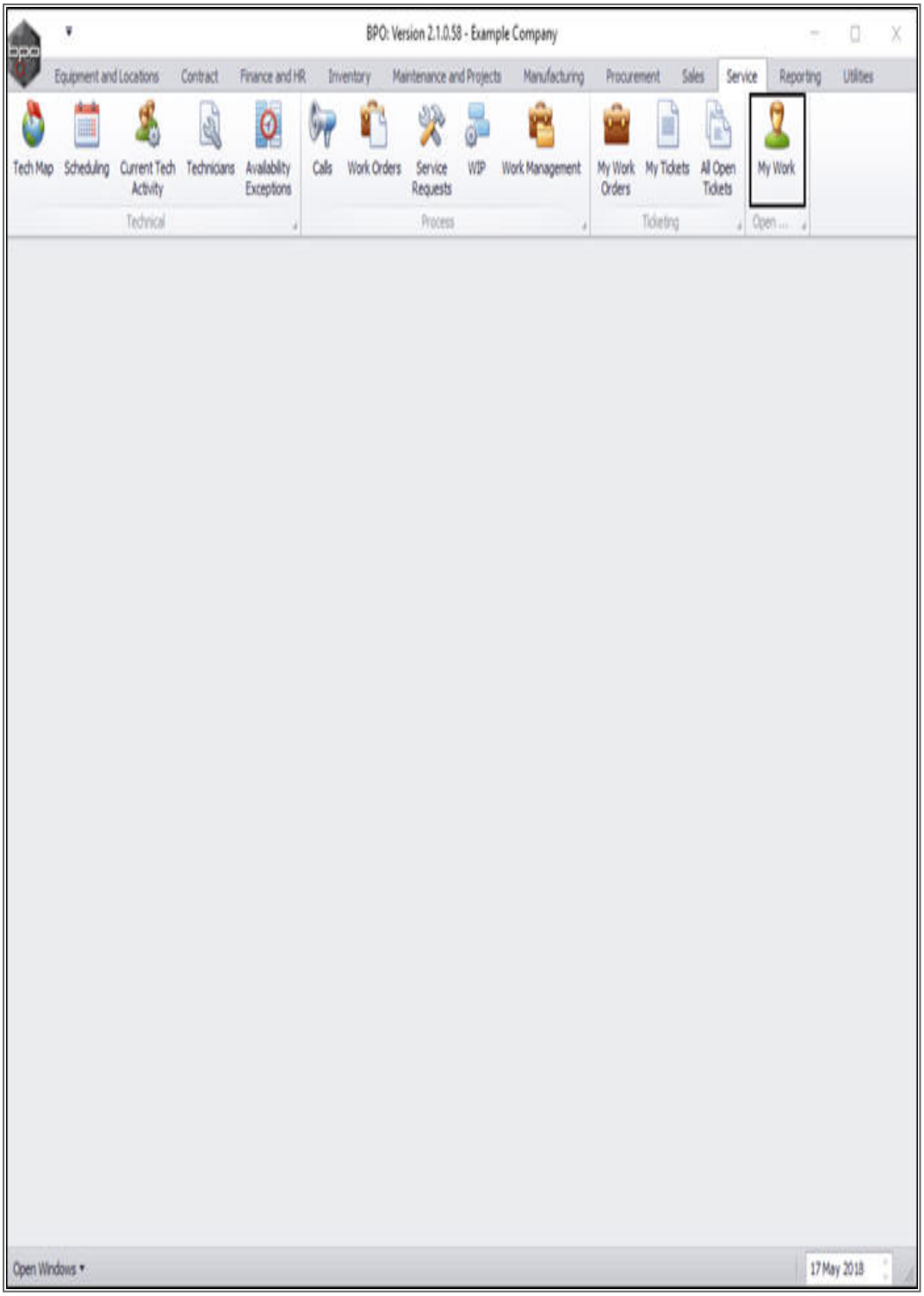

The ***My Work*** listing screen will be displayed.

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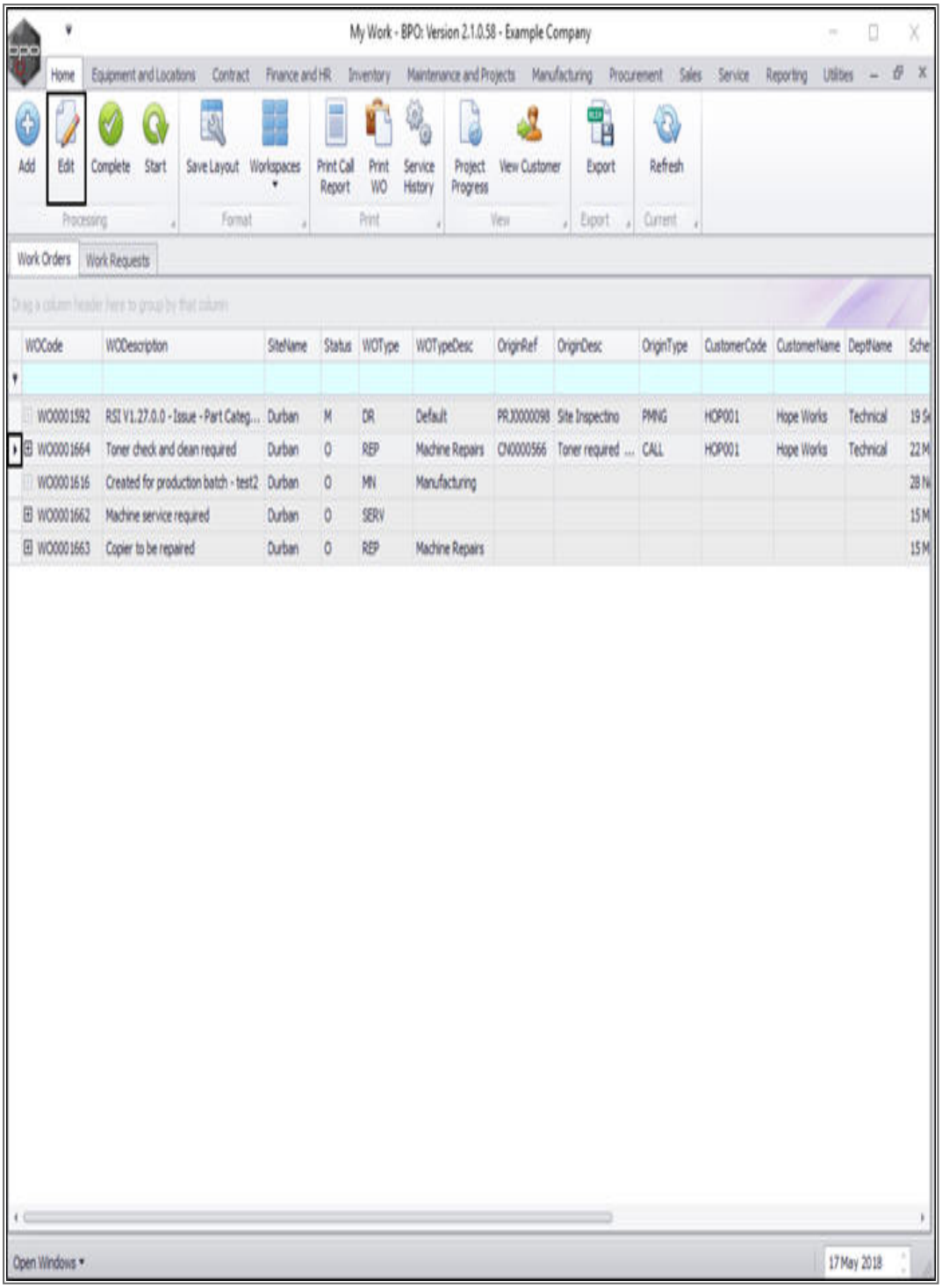
- Click on the ***row selector*** in front of the ***work order*** that you wish to ***view*** the linked ***digital documents*** of.
- Click on ***Edit***.



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VIEW LINKED DOCUMENTS

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

- Click on the ***Documents*** tile.

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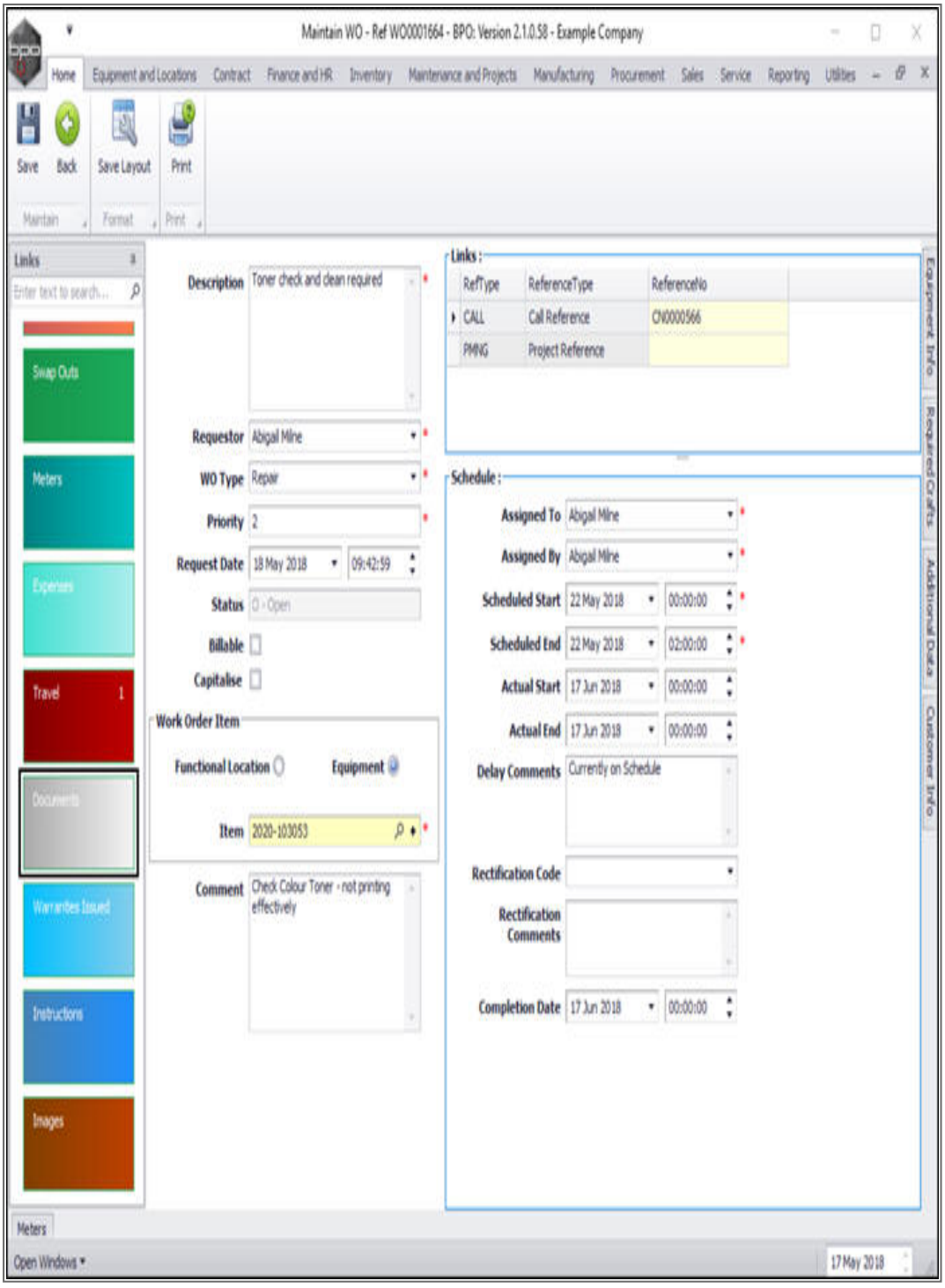

The ***Documents for WO - [ ]*** screen will be displayed.

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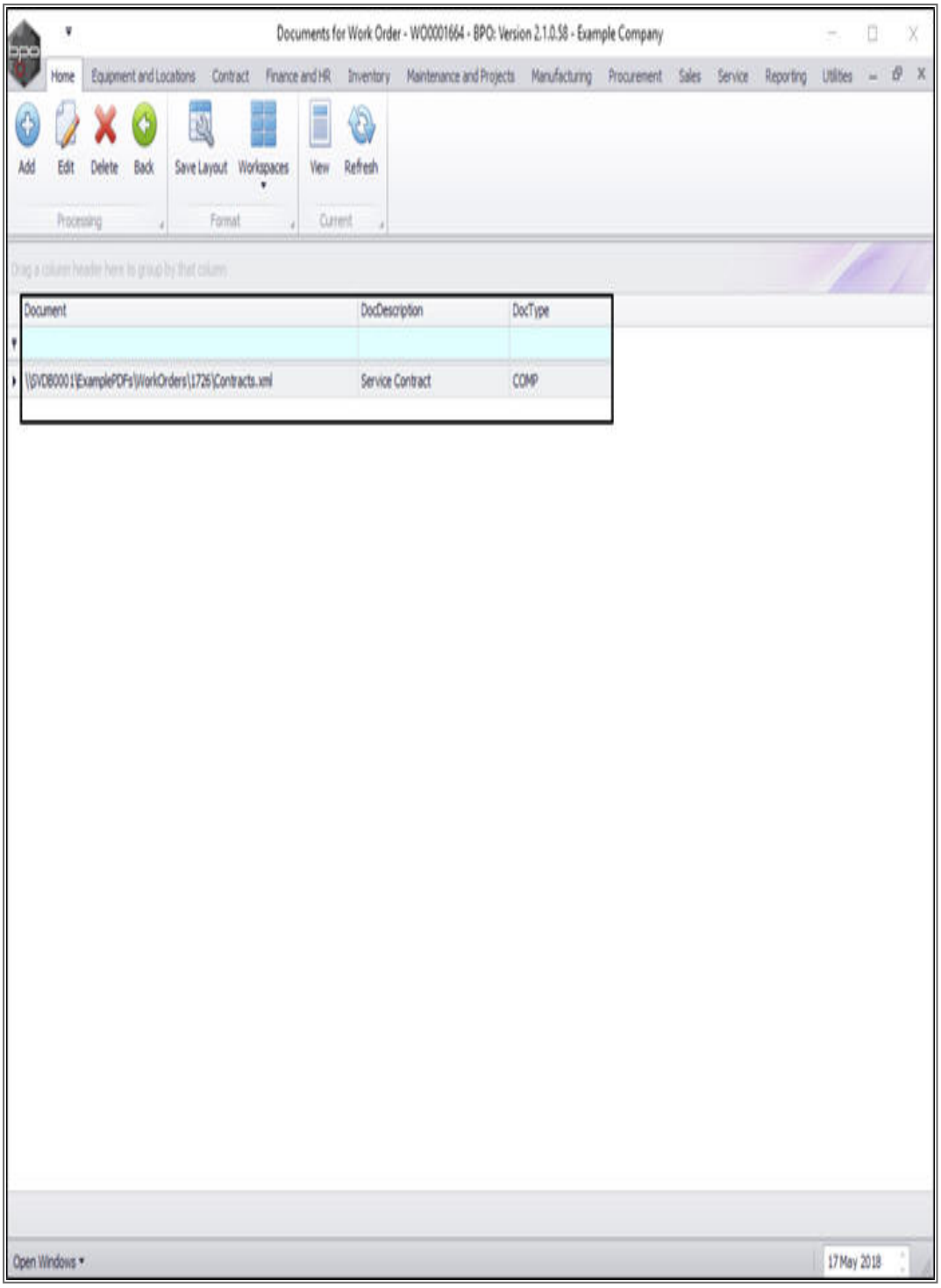
- Here you can view a ***list*** of all the ***digital documents*** linked to this work order.



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ADD A NEW DOCUMENT

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

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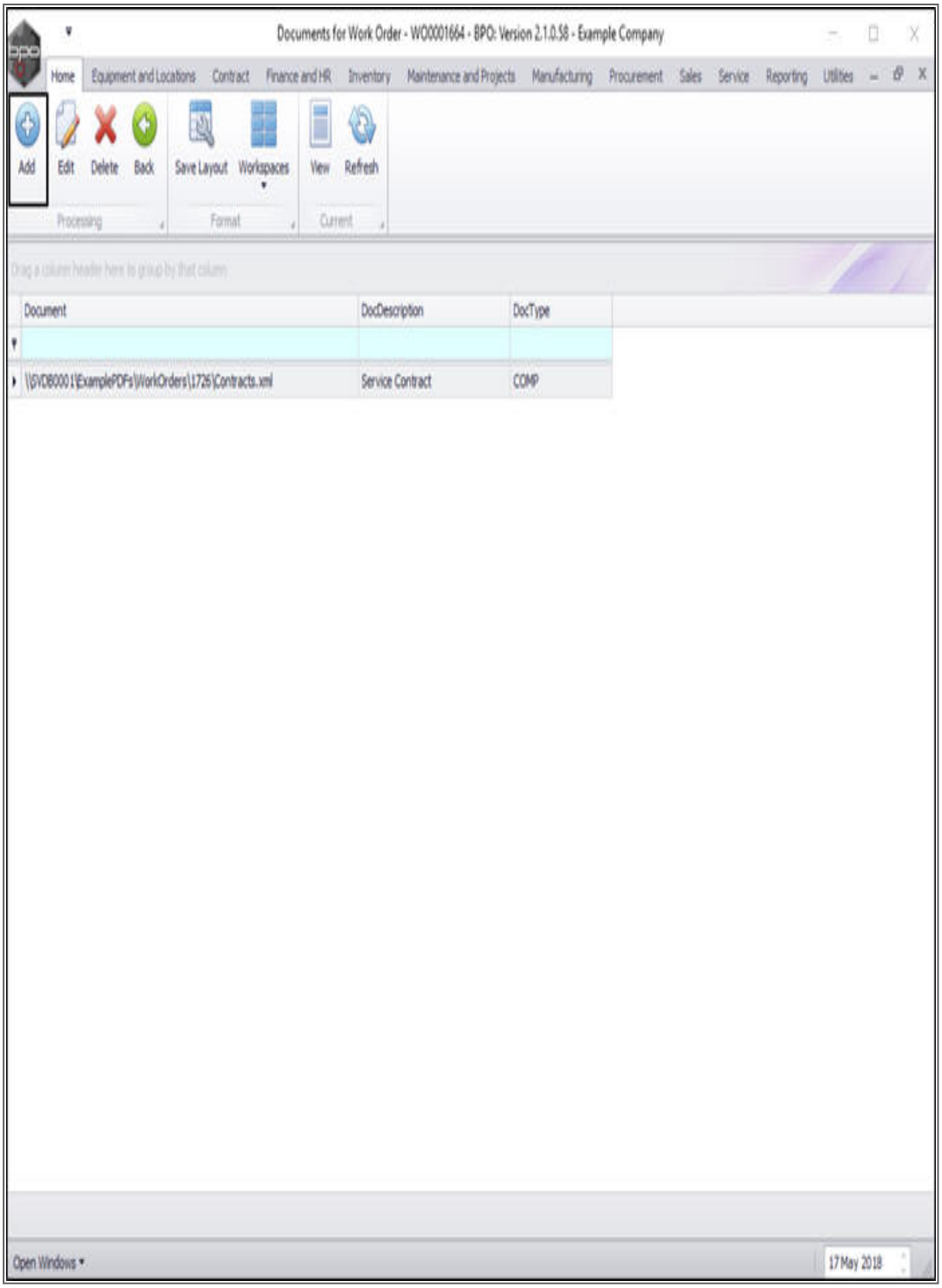

The ***New Document for Work Order: [ ]*** screen will be displayed.

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- 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.

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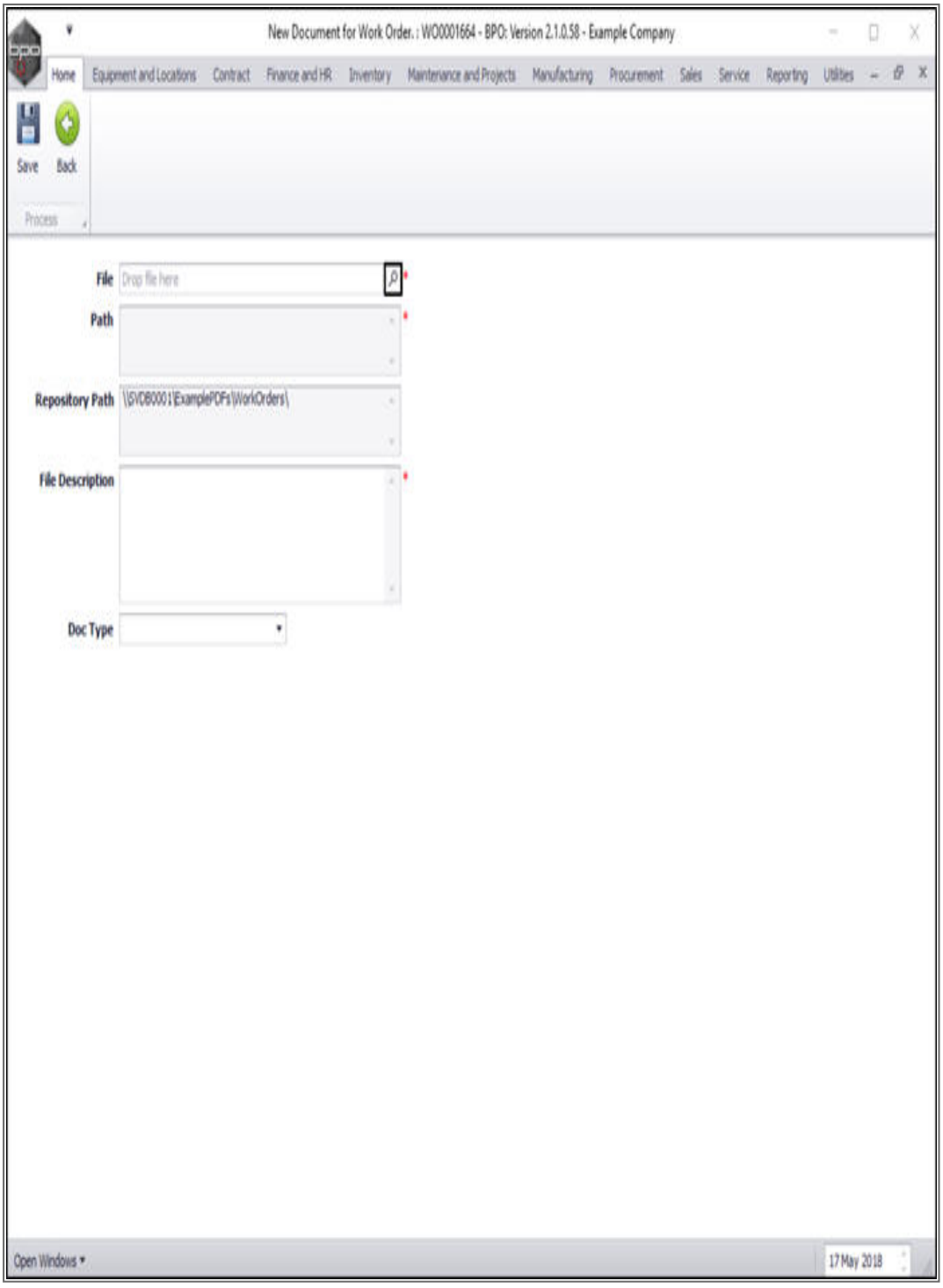

- The ***Select File*** screen will pop up.
- Select the relevant document to attach to this work order.

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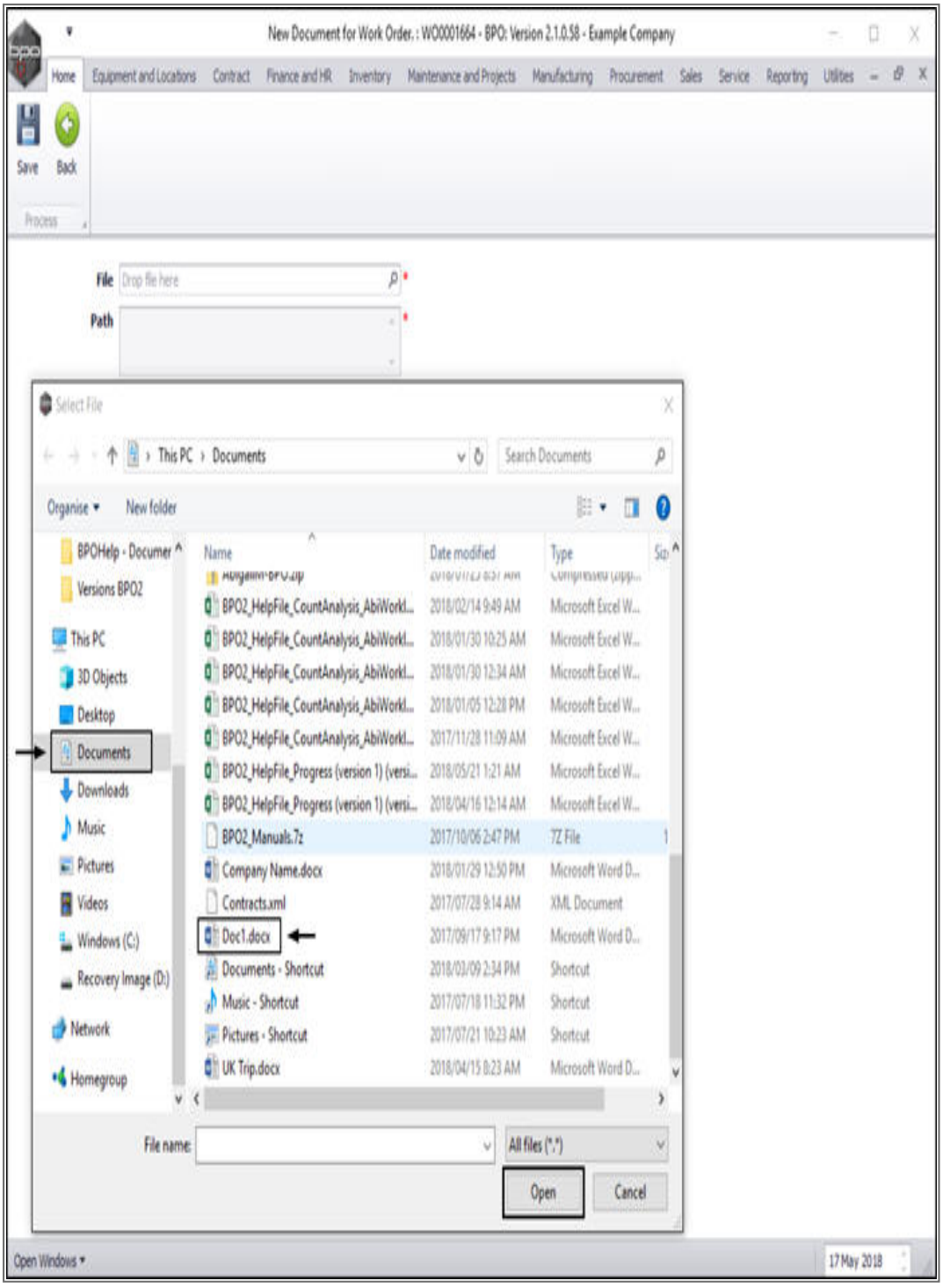
- Click on ***Open***.



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- **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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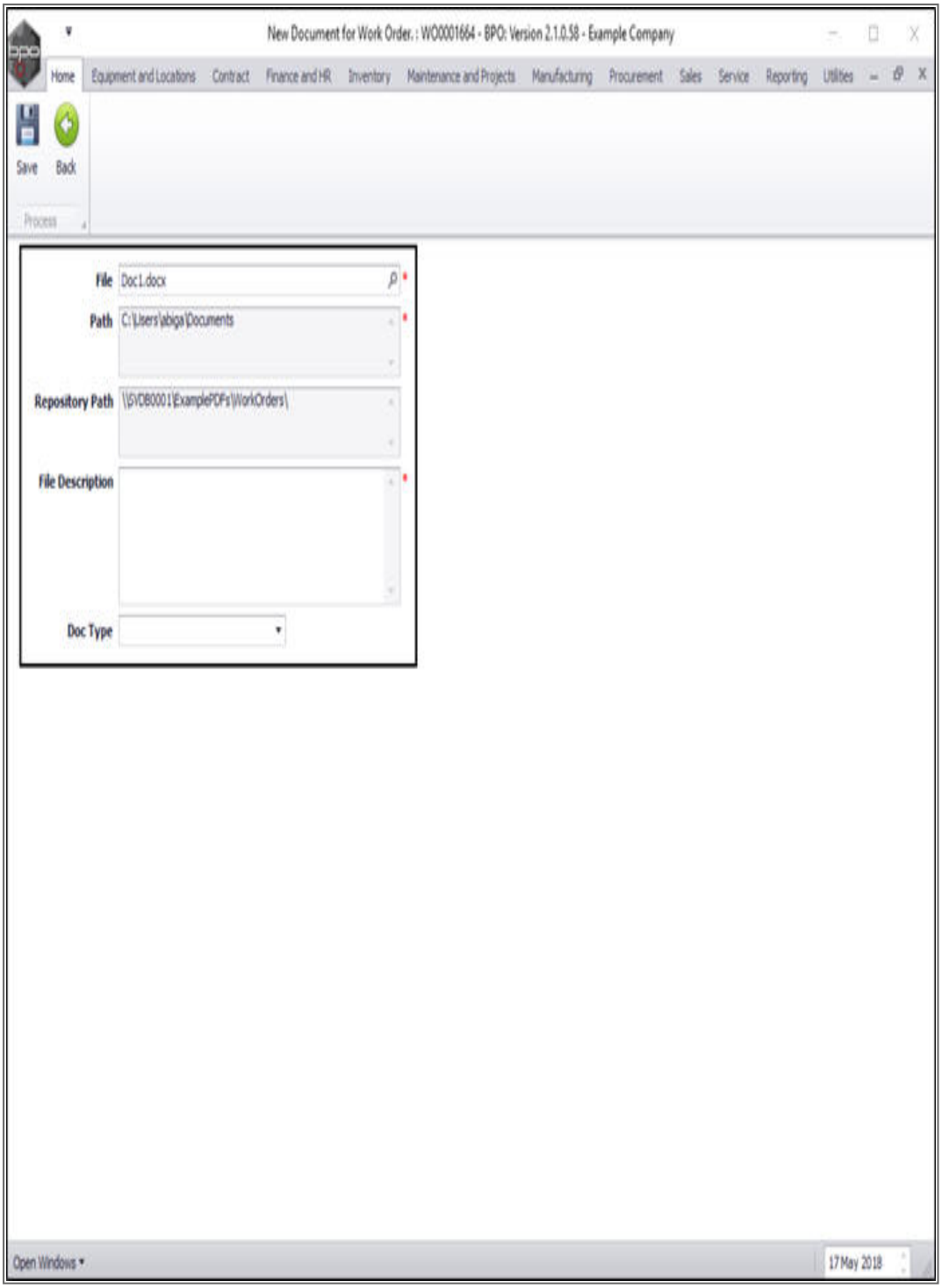

- When you have finished adding the new document details, click on ***Save***.

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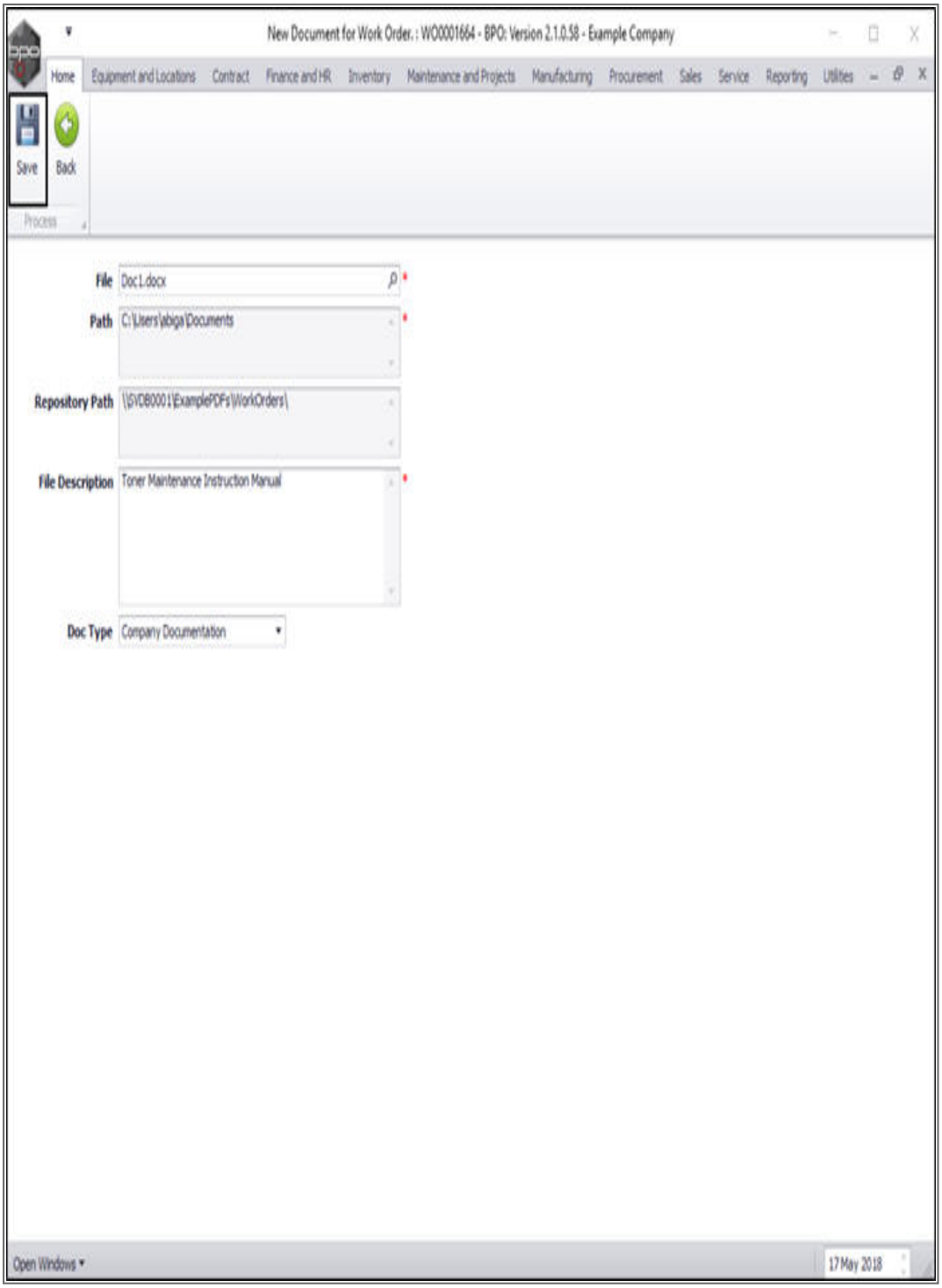

- A ***Document Processing*** message box will pop up informing you that;

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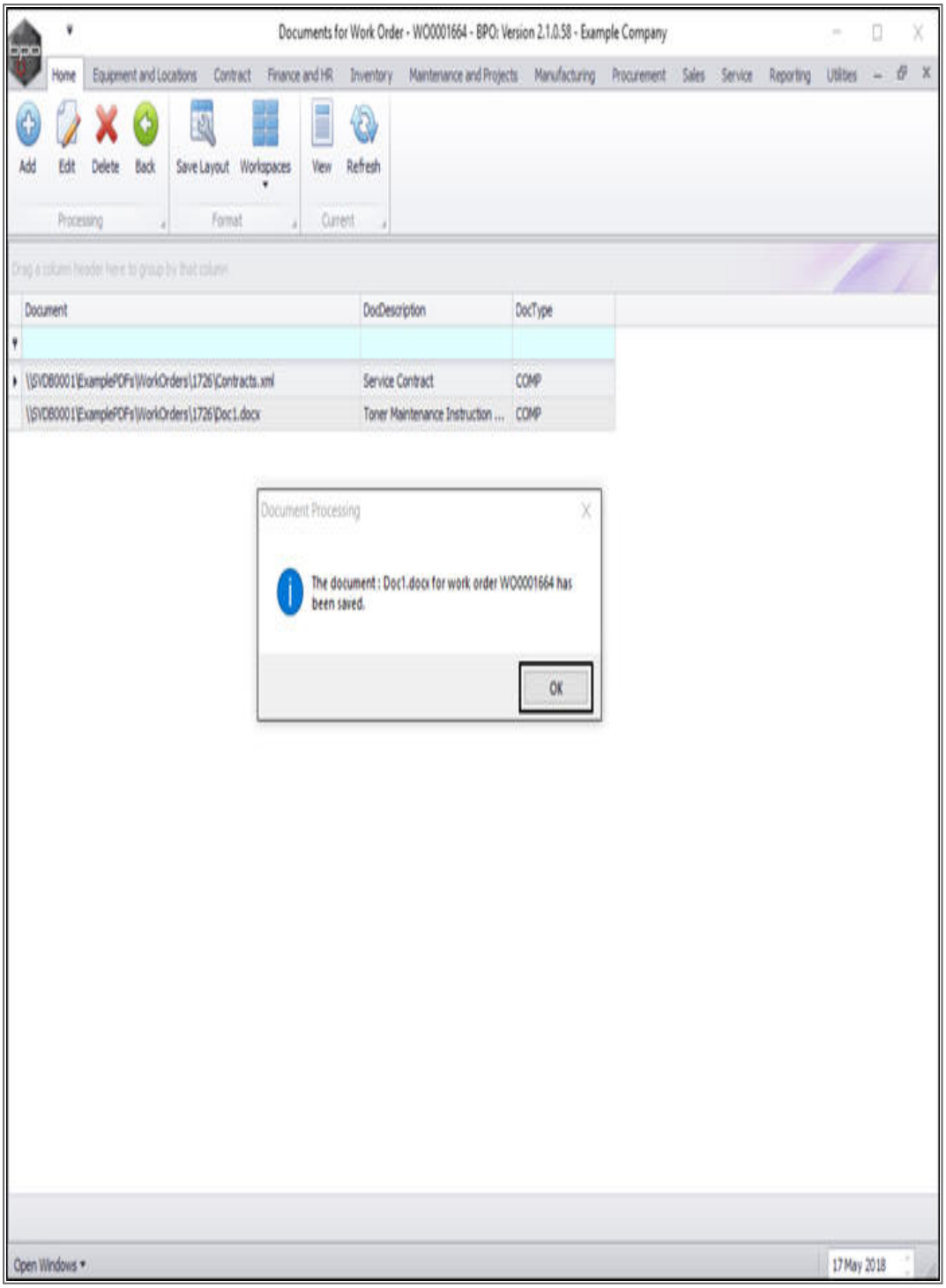
- ***The document: [ ] for work order [ ] has been saved.***

- 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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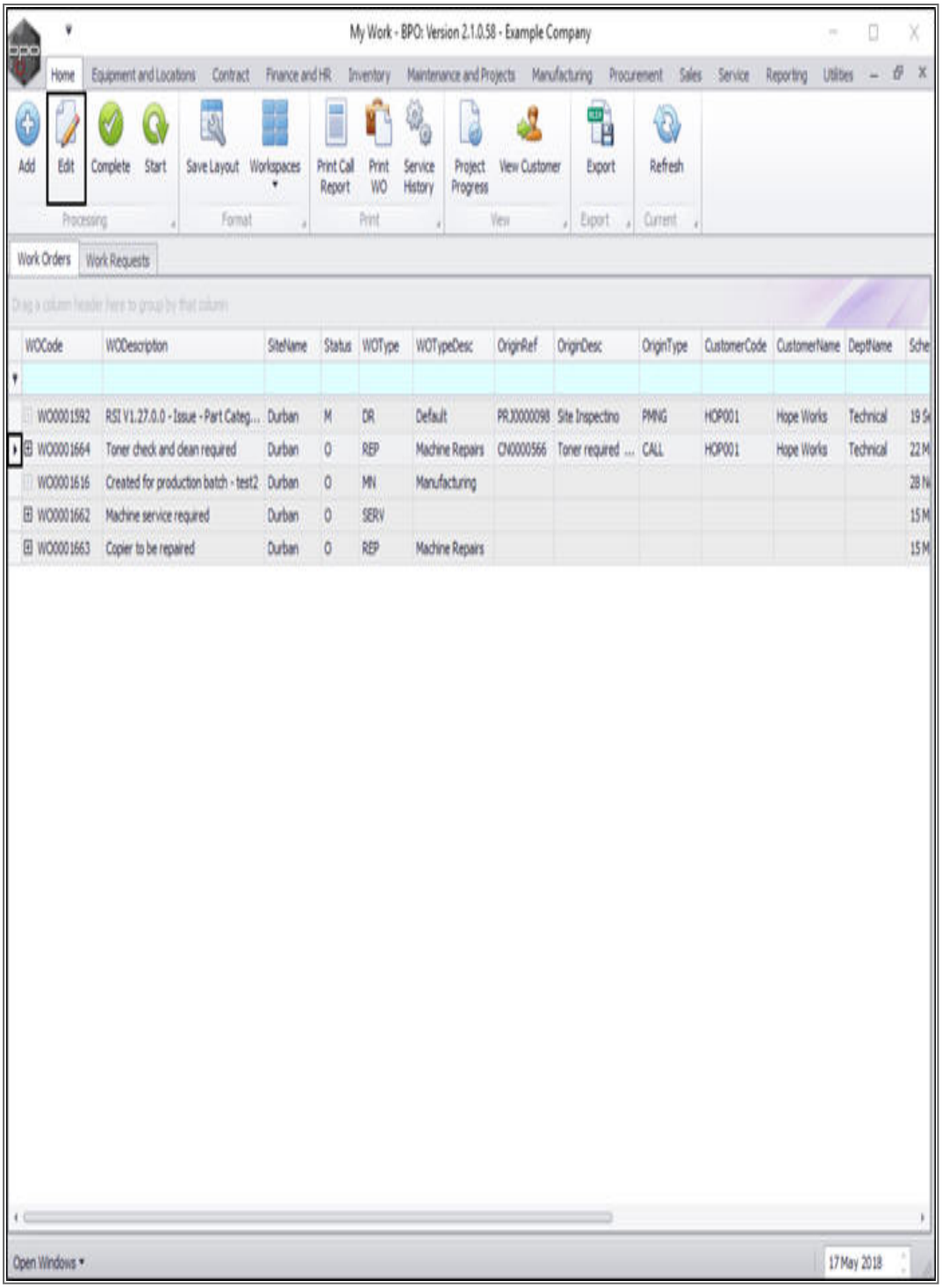

The ***Maintain WO - Ref [ ]*** screen will be displayed.

- Click on the ***Documents*** tile.

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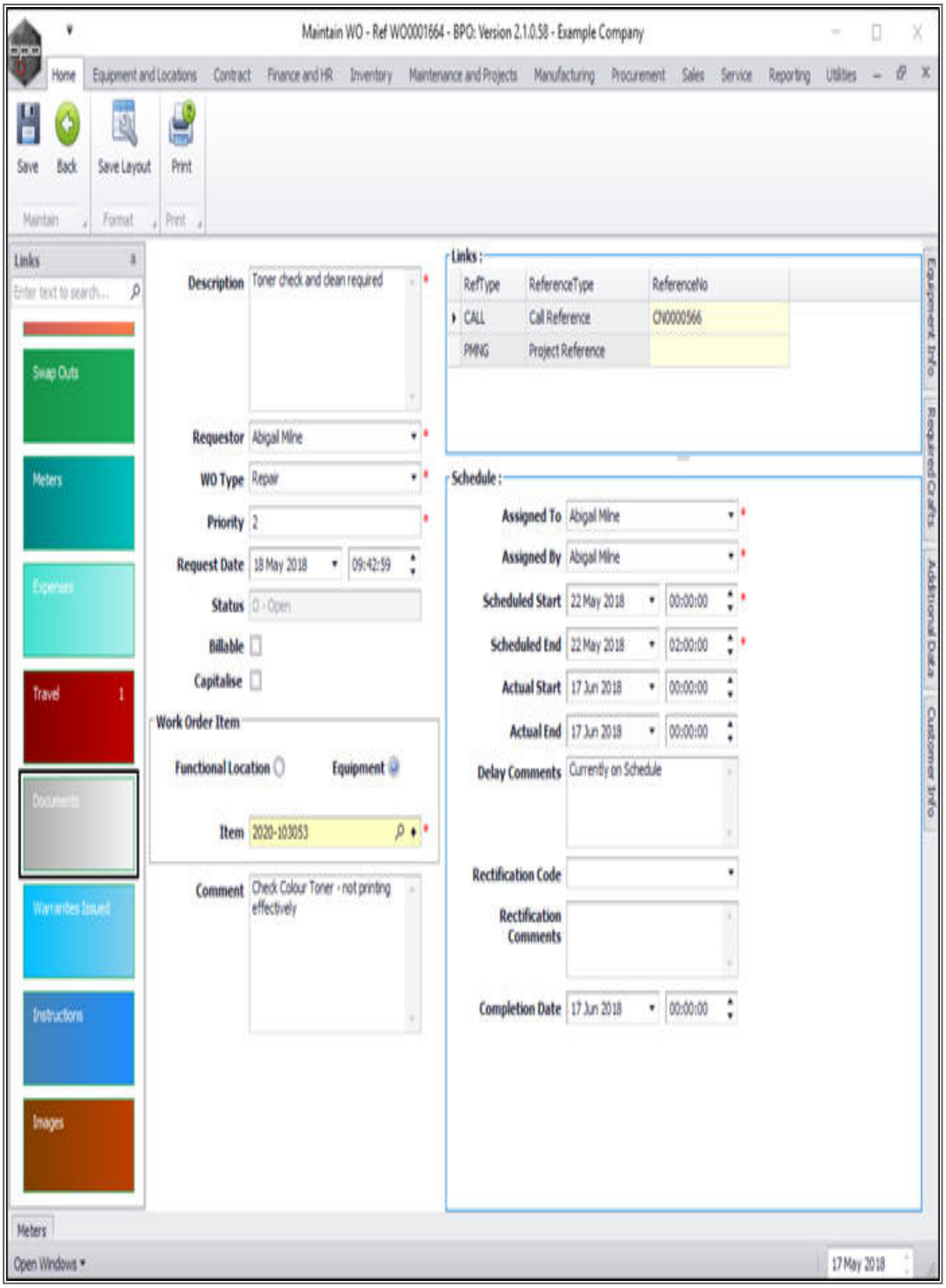

The ***Documents for Work Order - [ ]*** screen will be displayed.

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- 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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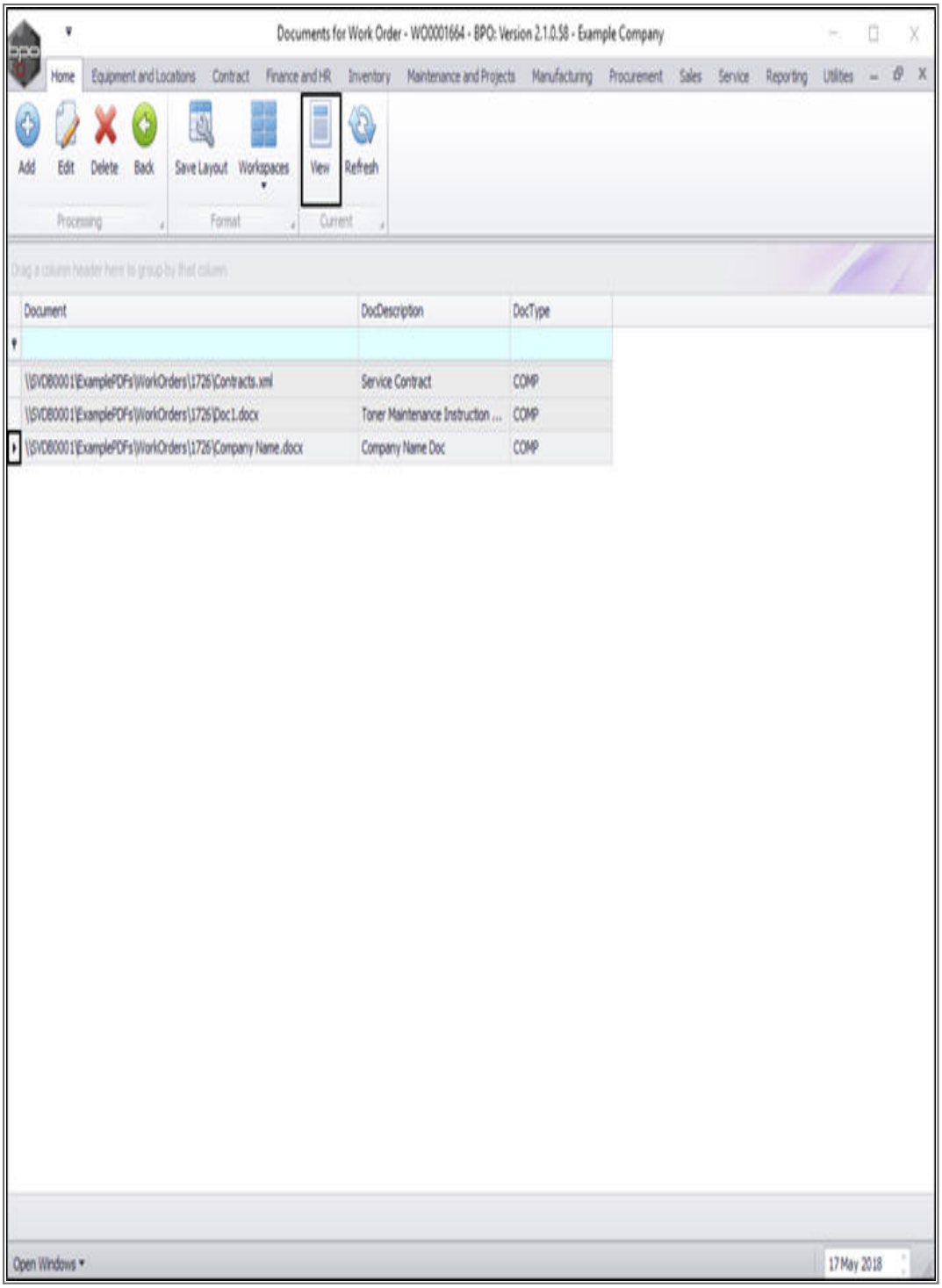

- The document will open within the relevant program, e.g. a ***Word*** document will open in ***Word***, a ***PDF*** file will open in ***Adobe***

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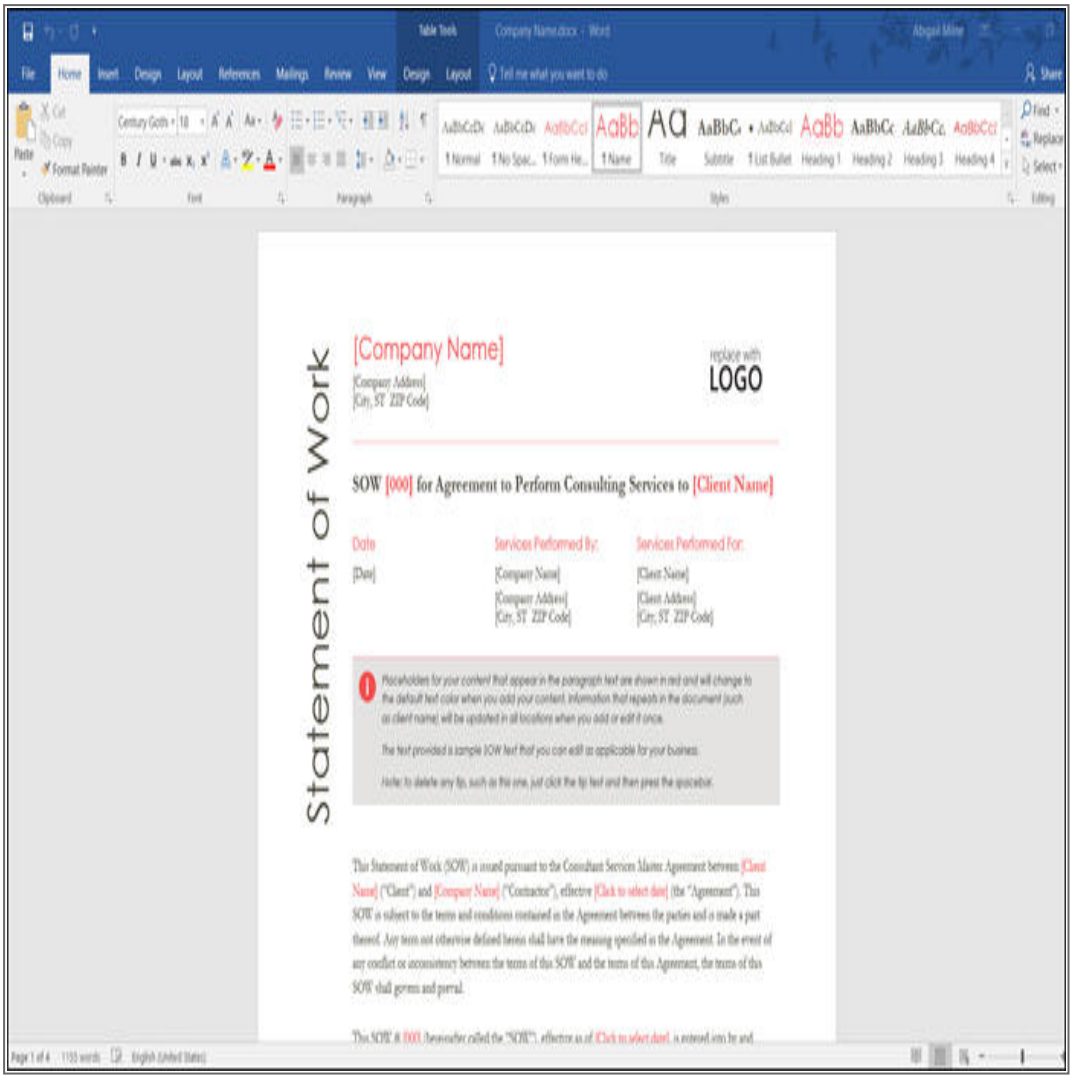
Reader.



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