

# SERVICE

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

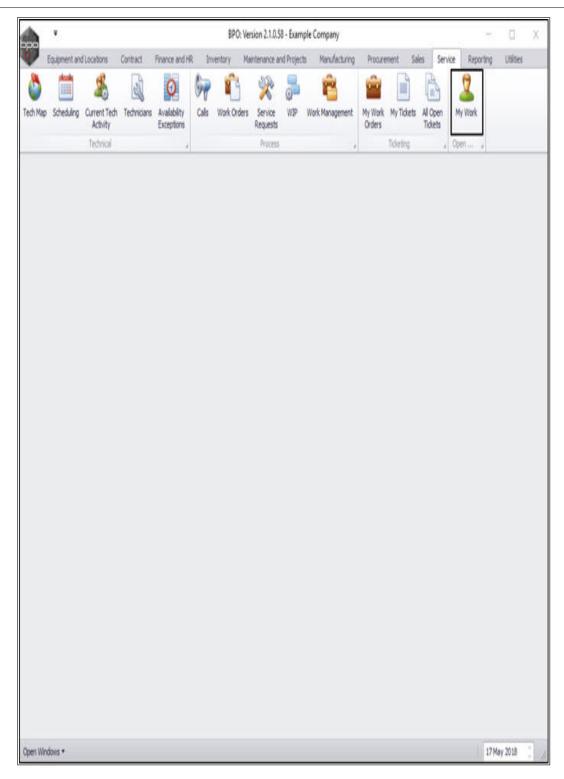
Digital documents (e.g. documents scanned to PDF) can be linked in various places on BPO.

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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### **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.



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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.



- 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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• 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* 



### Reader.

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