

## 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.

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**Ribbon Access:** *Service > My Work*

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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**.

My Work - 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

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	Sche
WO0001392	RSL V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	19 54
<input checked="" type="checkbox"/>	WO0001664	Toner check and clean required	Durban	O	REP	CH0000566	Toner required ...	CALL	HOP001	Hope Works	Technical	22 M
<input type="checkbox"/>	WO0001616	Created for production batch - test2	Durban	O	MN							28 M
<input checked="" type="checkbox"/>	WO0001662	Machine service required	Durban	O	SERV							15 M
<input checked="" type="checkbox"/>	WO0001663	Copier to be repaired	Durban	O	REP							15 M

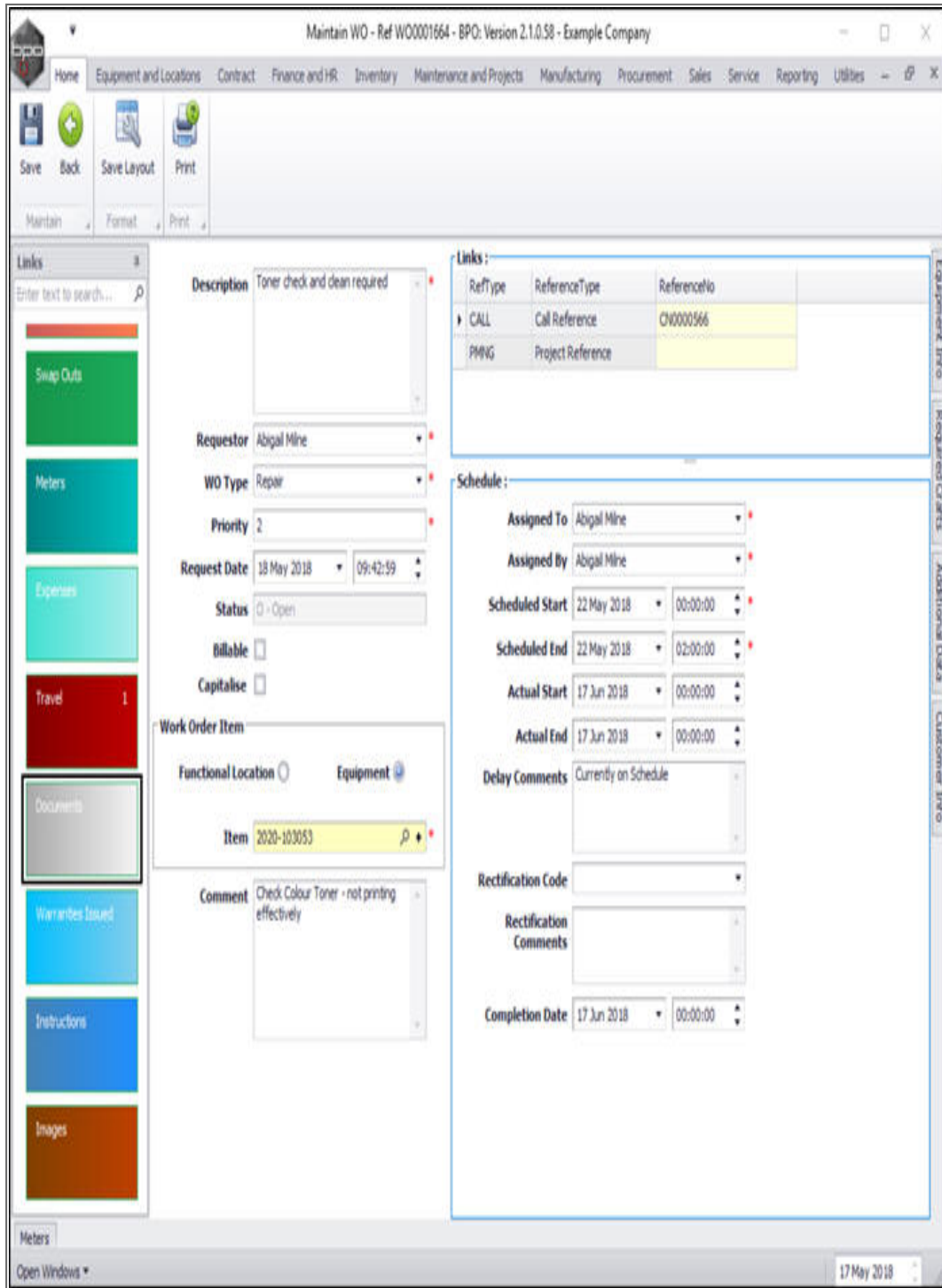
Open Windows | 17 May 2018

## VIEW LINKED DOCUMENTS

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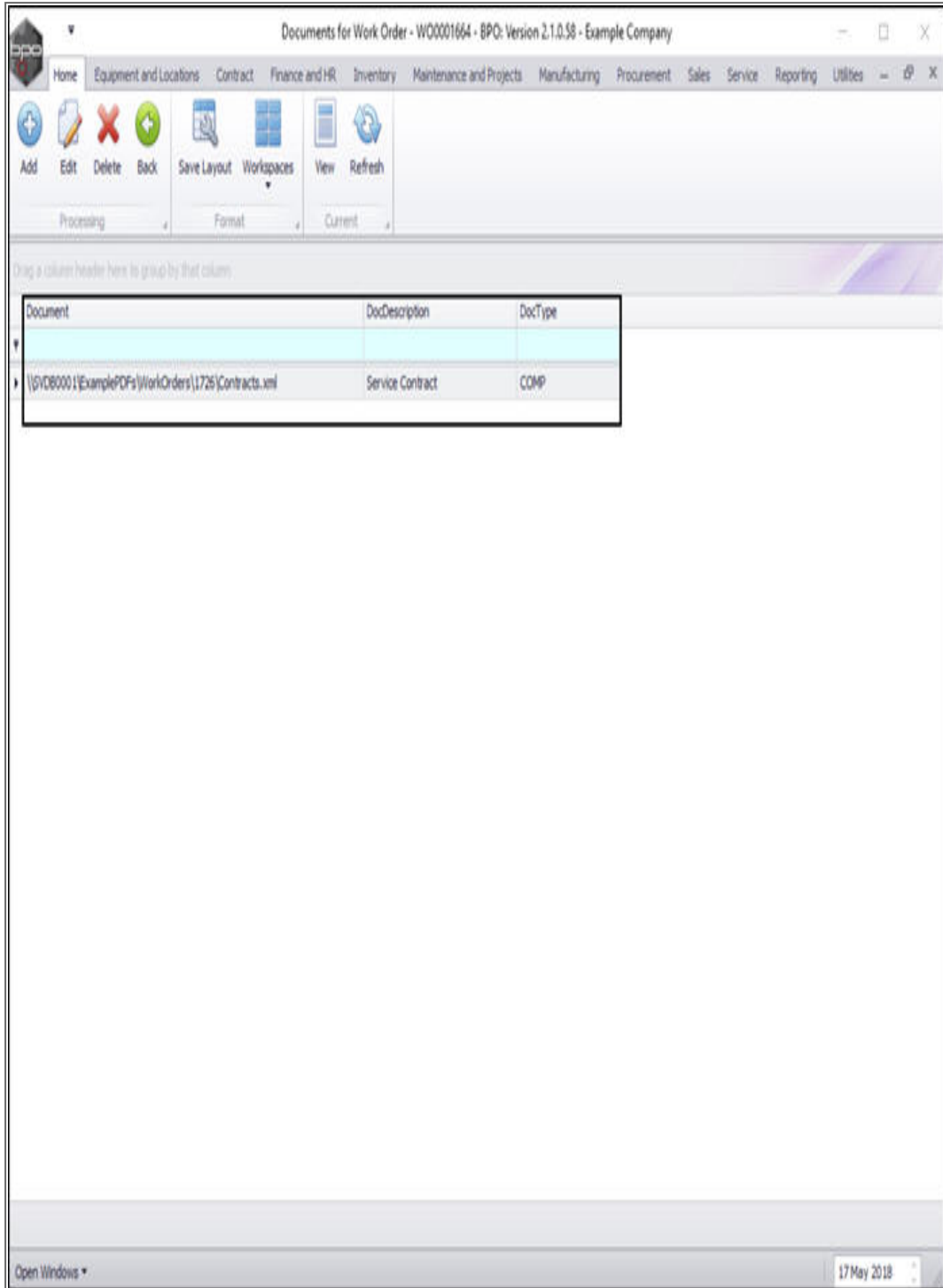
The *Maintain WO - Ref [ ]* screen will be displayed.

- Click on the *Documents* tile.



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

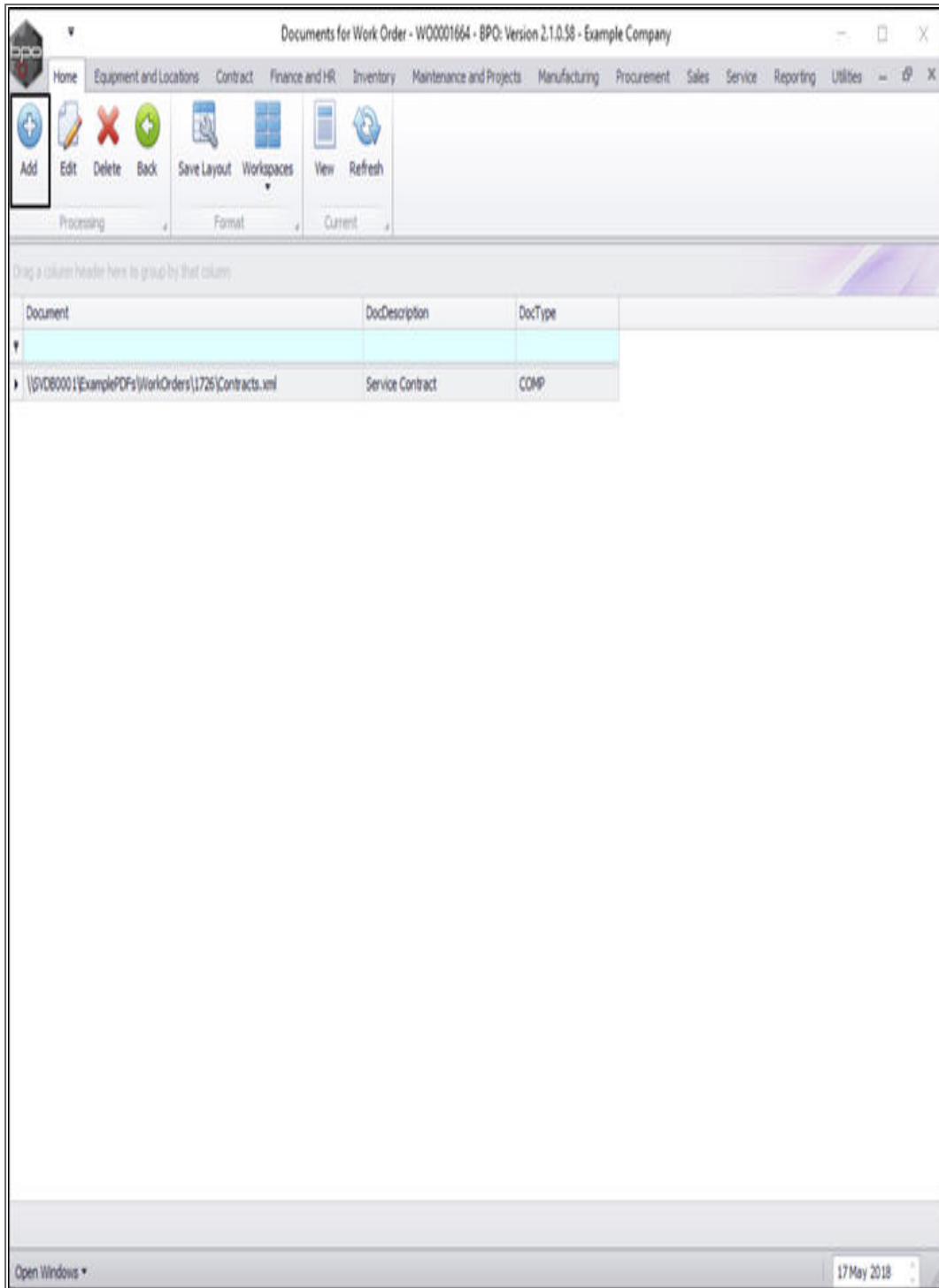
- Here you can view a **list** of all the **digital documents** linked to this work order.



## **ADD A NEW DOCUMENT**

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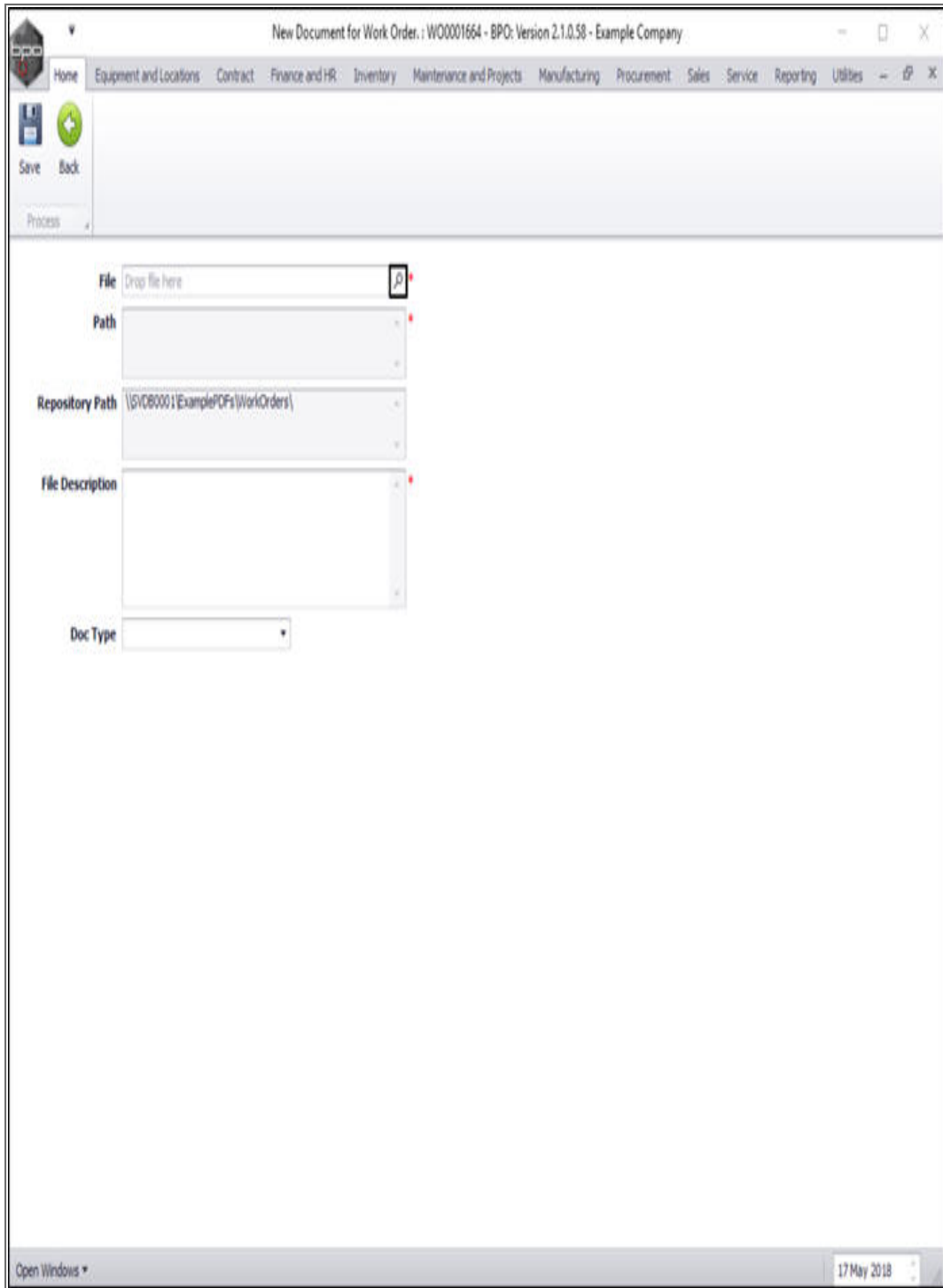
- In the *Documents for Work Order - [ ]* listing screen, click on *Add*.



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



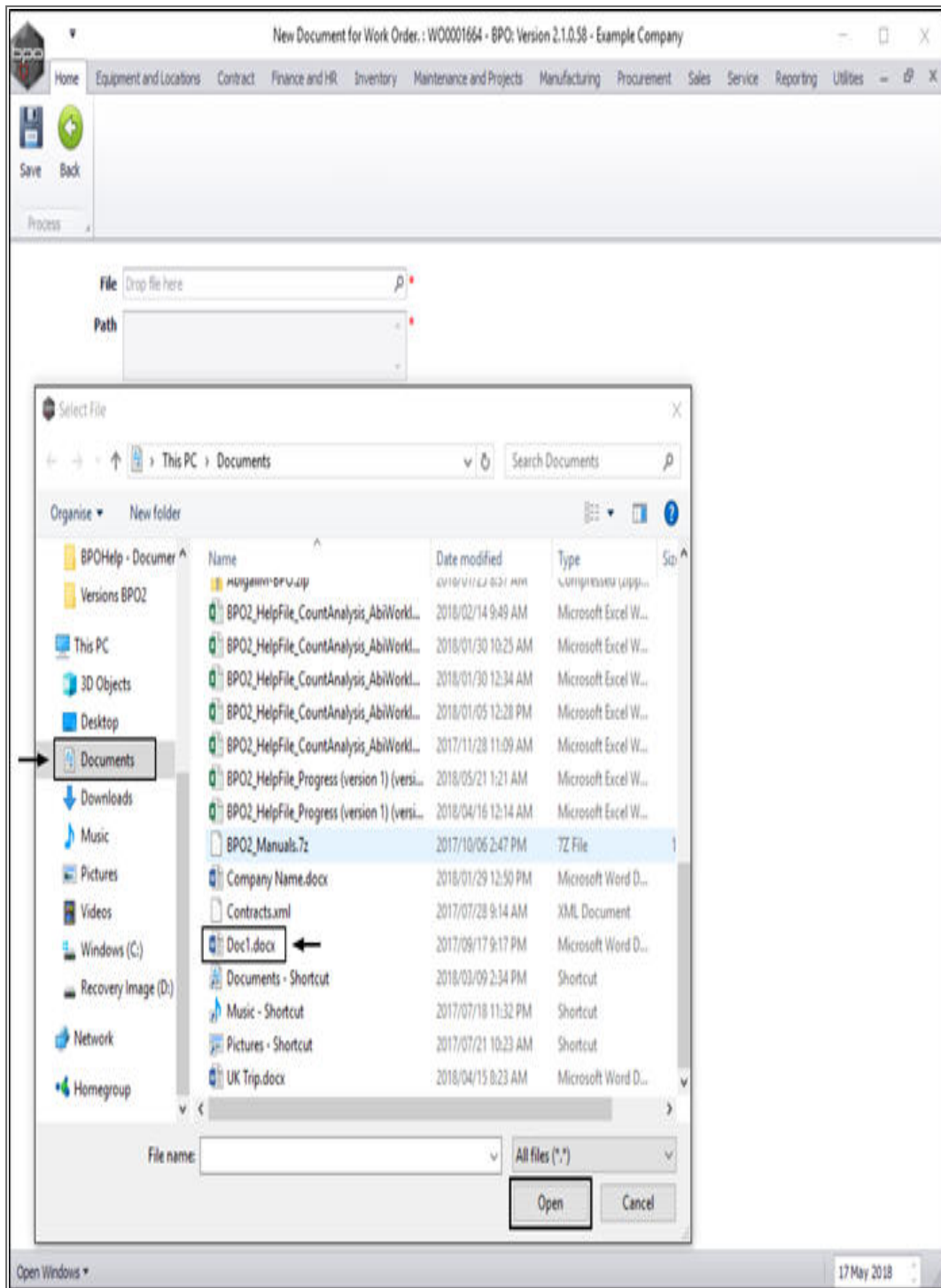
- You will note that the Repository Path is auto populated according to the path that has been set up in the **company configuration**.
- Click on the **search** button in the **File** field to find the document in the **shared location** on the server.



The screenshot shows a web application window titled "New Document for Work Order : WO0001664 - BPO: Version 2.1.0.58 - Example Company". The interface includes a navigation menu with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu are "Save" and "Back" buttons, and a "Process" dropdown. The main content area contains several input fields: "File" with a "Drop file here" placeholder and a file selection icon; "Path" with a text input field; "Repository Path" with a text input field containing the value "(SVCB0001)ExamplePDFs\WorkOrders"; "File Description" with a large text area; and "Doc Type" with a dropdown menu. The bottom of the window shows "Open Windows" and a date of "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

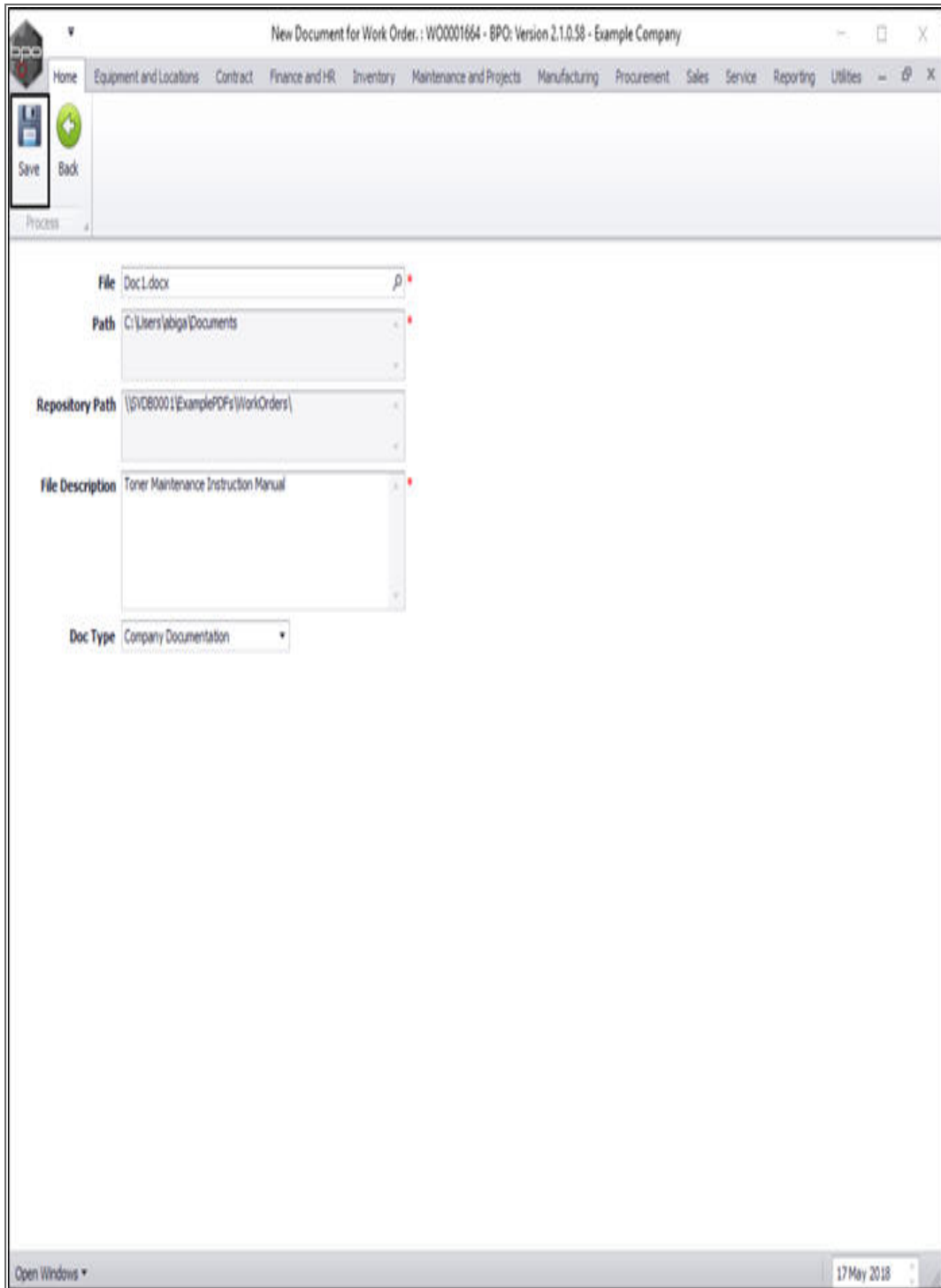
Repository Path \\SYDB0001\ExamplePDFs\WorkOrders

File Description

Doc Type

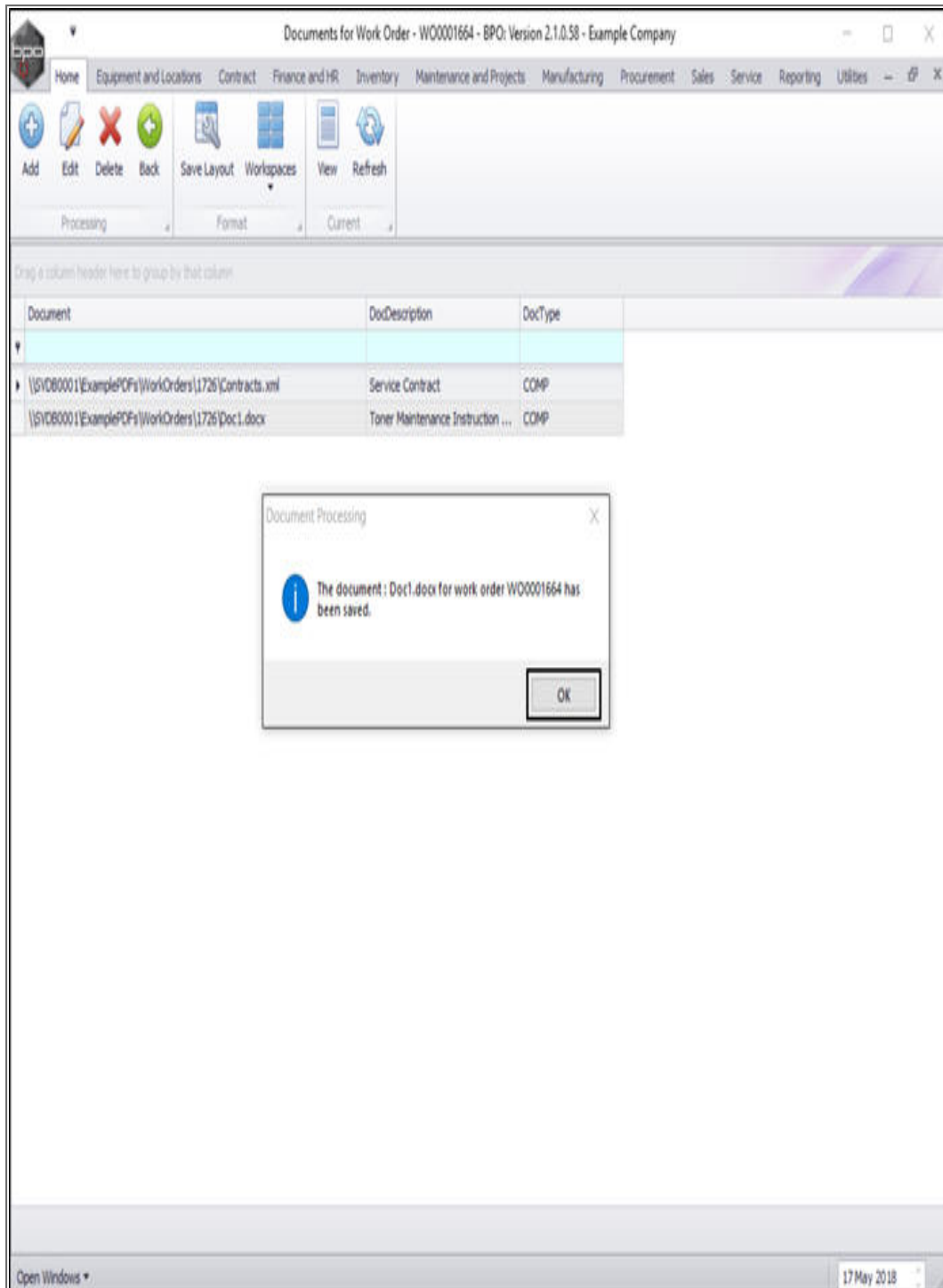
Open Windows 17 May 2018

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



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

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

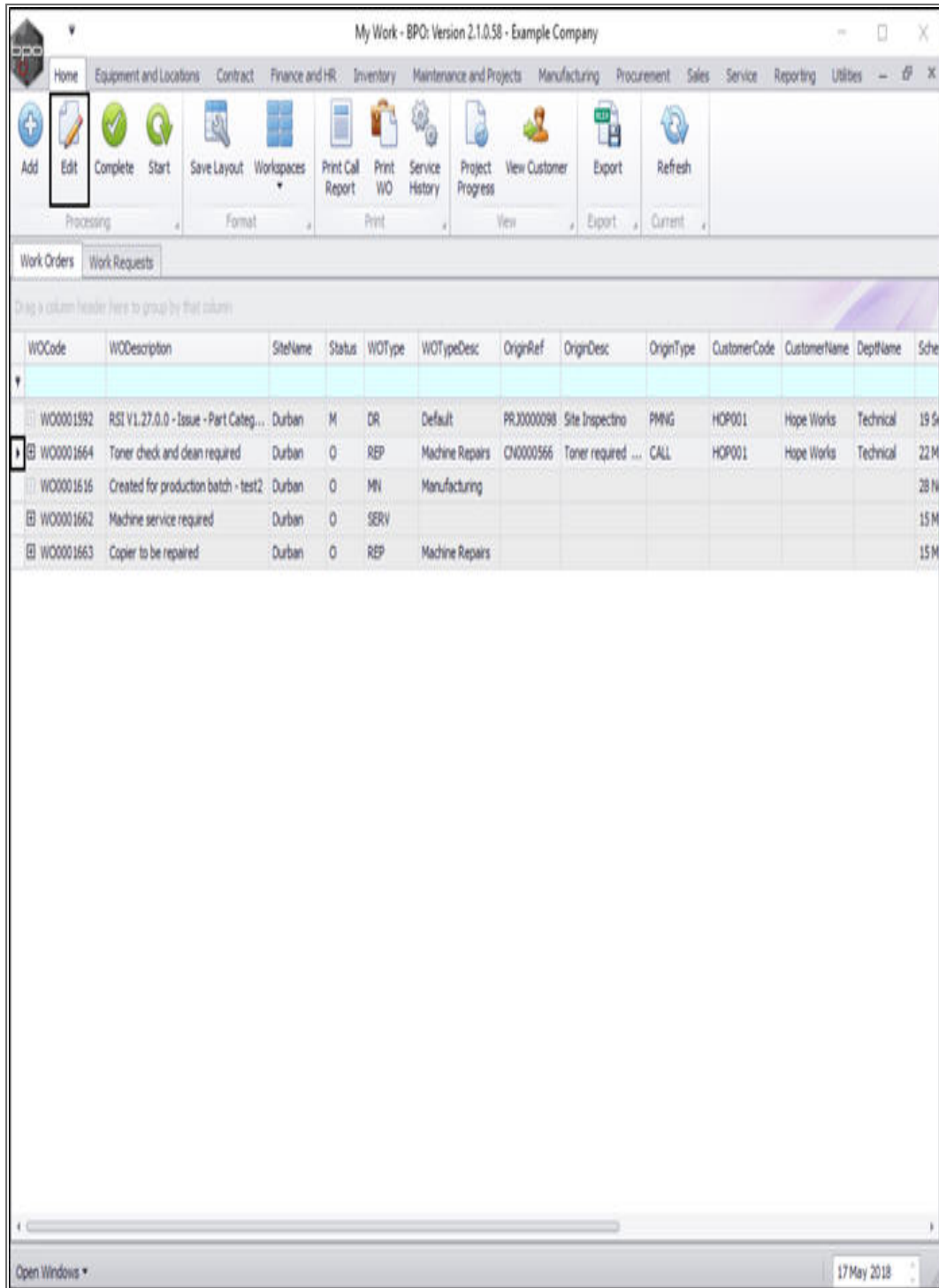


## OPEN AND VIEW DOCUMENT CONTENTS

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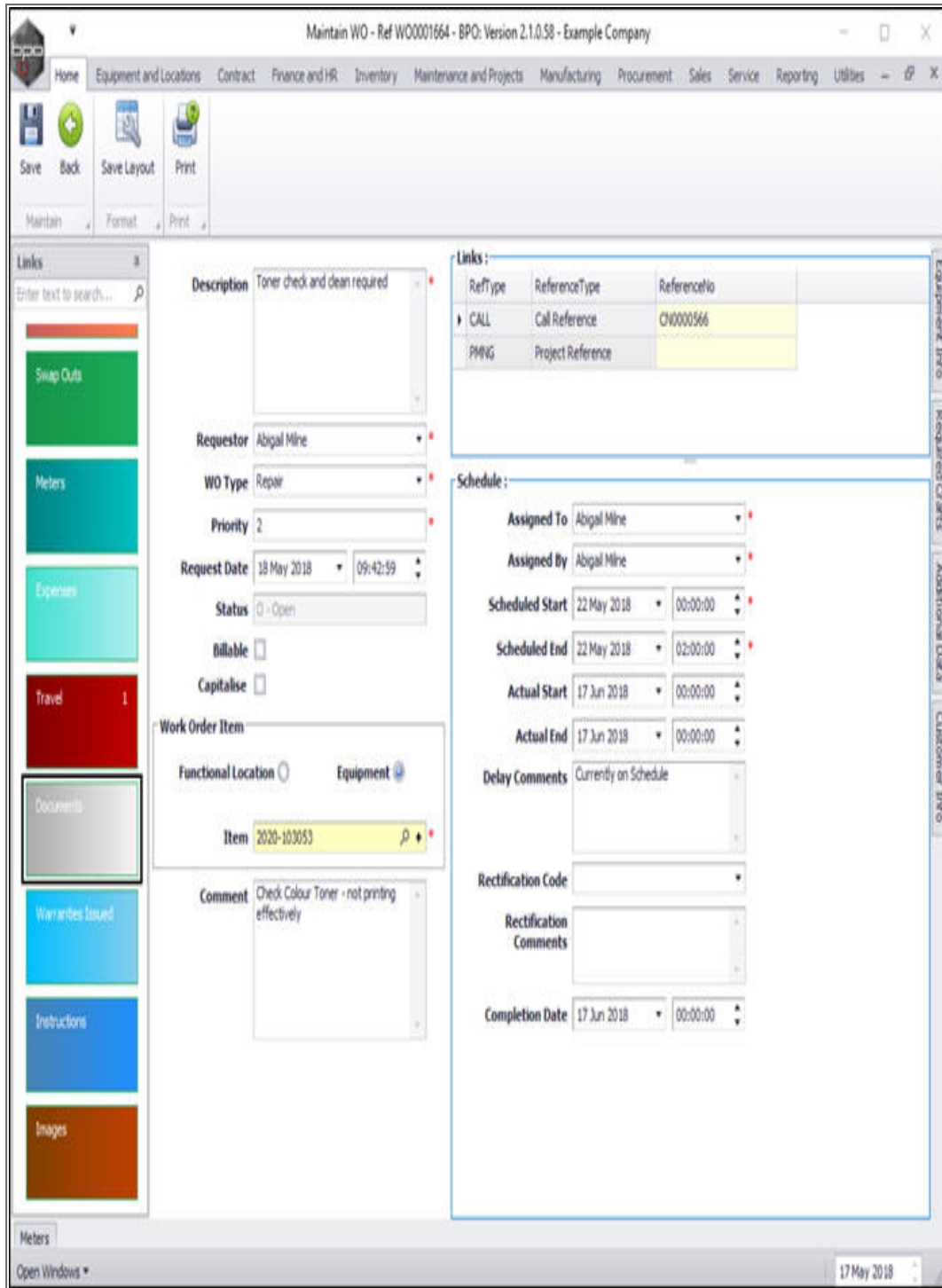
- Click on the *row selector* in front of the *work order* that you wish to *open/view* the linked documents of.
- Click on *Edit*.





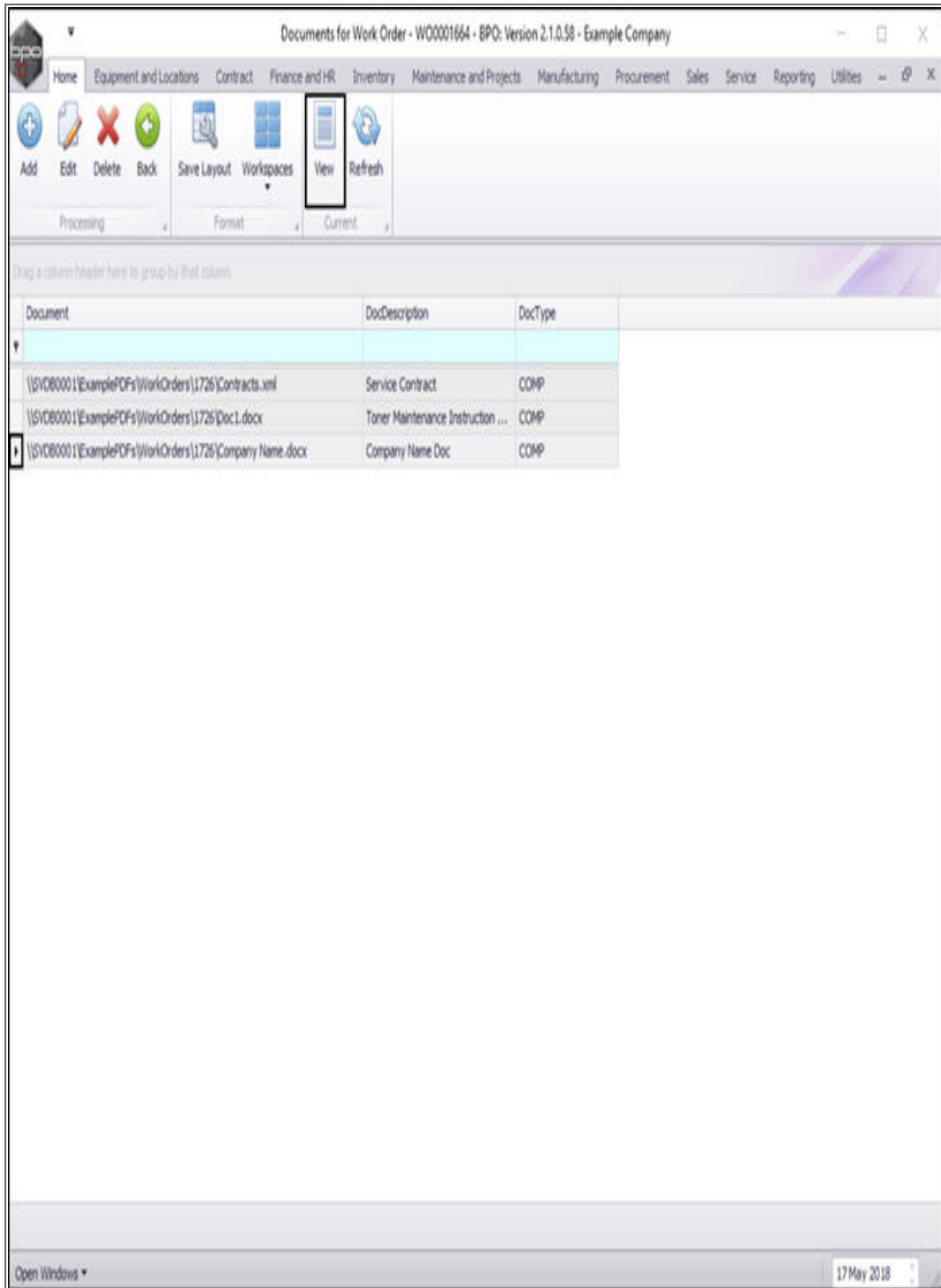
The **Maintain WO - Ref [ ]** screen will be displayed.

- Click on the **Documents** tile.



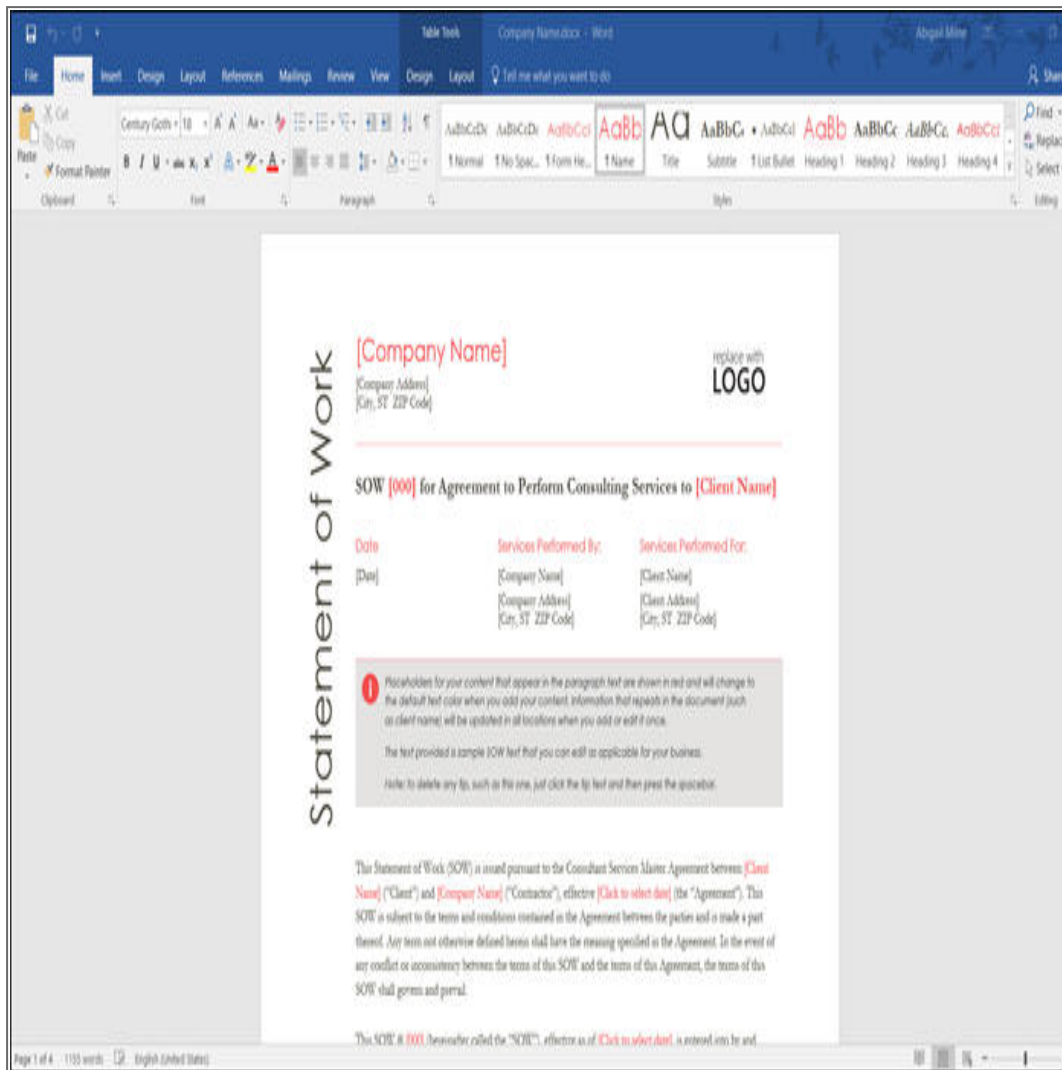
The **Documents for Work Order - [ ]** screen will be displayed.

- 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

