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

EQUIPMENT

## ASSETS – VIEW, ADD, EDIT, DELETE DOCUMENTS

Digital documents (for example, documents scanned to PDF) can be linked in various places in BPO.

The document should be saved on the **server** to enable all users with the relevant security rights to view the document. If saved and linked from the workstation, another workstation cannot view the document.

**Ribbon Access:** Equipment and Locations > Assets
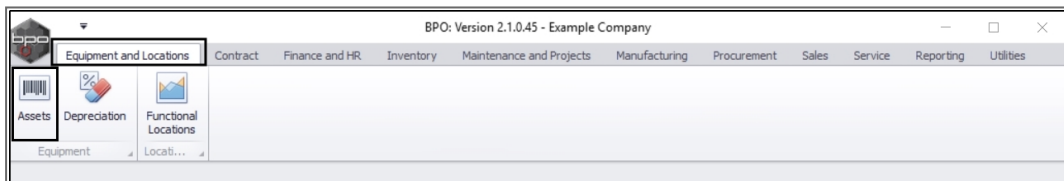
- The **Machine List for []** screen will be displayed.
- The data grid will list <u>all</u> the assets currently on the system.

THE SITE AND TYPE FILTERS

- Depending on your company configuration, you may need to click on the **drop-down arrow** and select the correct **Site** from the list, before proceeding.

Note: Refer to Site Selection for more information

- In this example, **Durban** is selected.
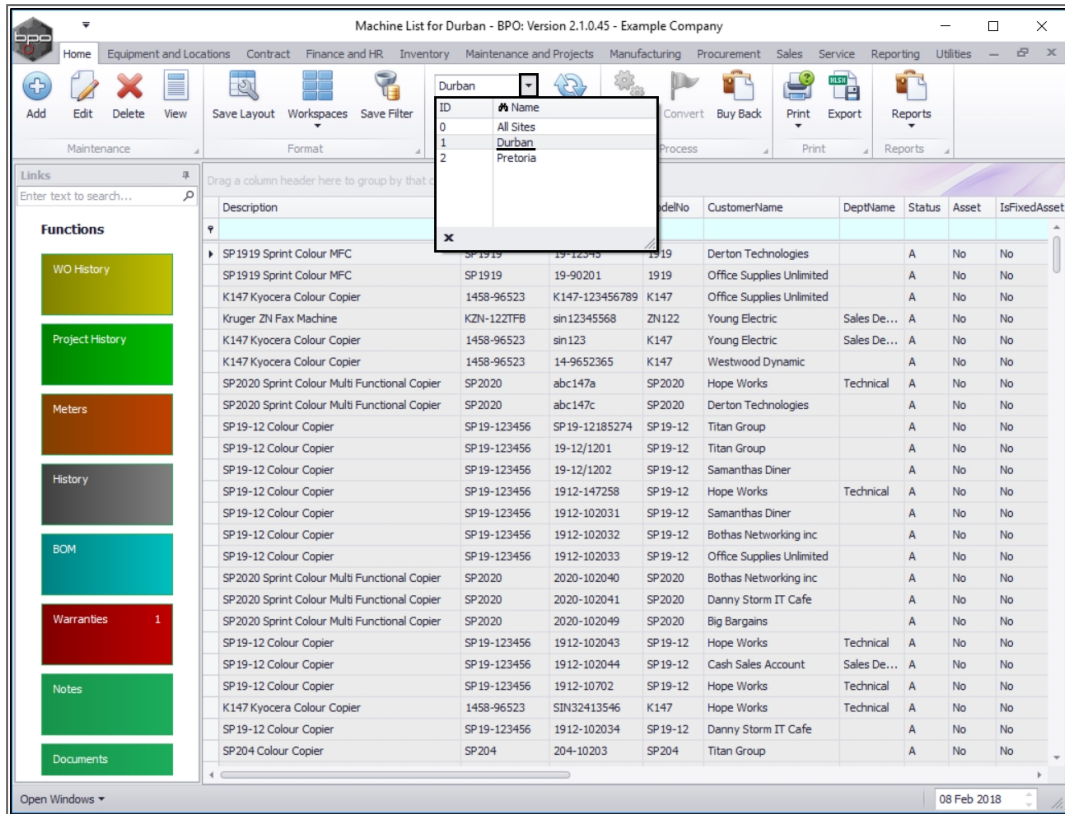
This screen will open by default in the **All** Type. You do <u>not</u> need to change this Type to view or add asset documents. If this screen is already open in another Type for example, '**Internal Assets**', then click on the **drop-down arrow** and select from the list, the right Type that contains the asset you wish to work with.

SELECT THE ASSET

- Select the **row** of the **asset** where you wish to **view** the linked digital document(s).
- Click on the **Documents** tile.

VIEW LINKED DOCUMENT CONTENTS

- The **Documents for Equipment []** screen will open.
- Here you can view a list of the documents <u>currently</u> linked to the selected asset.
- Select the **row** of the **document** where you wish to view the contents.
- Click on **View**.
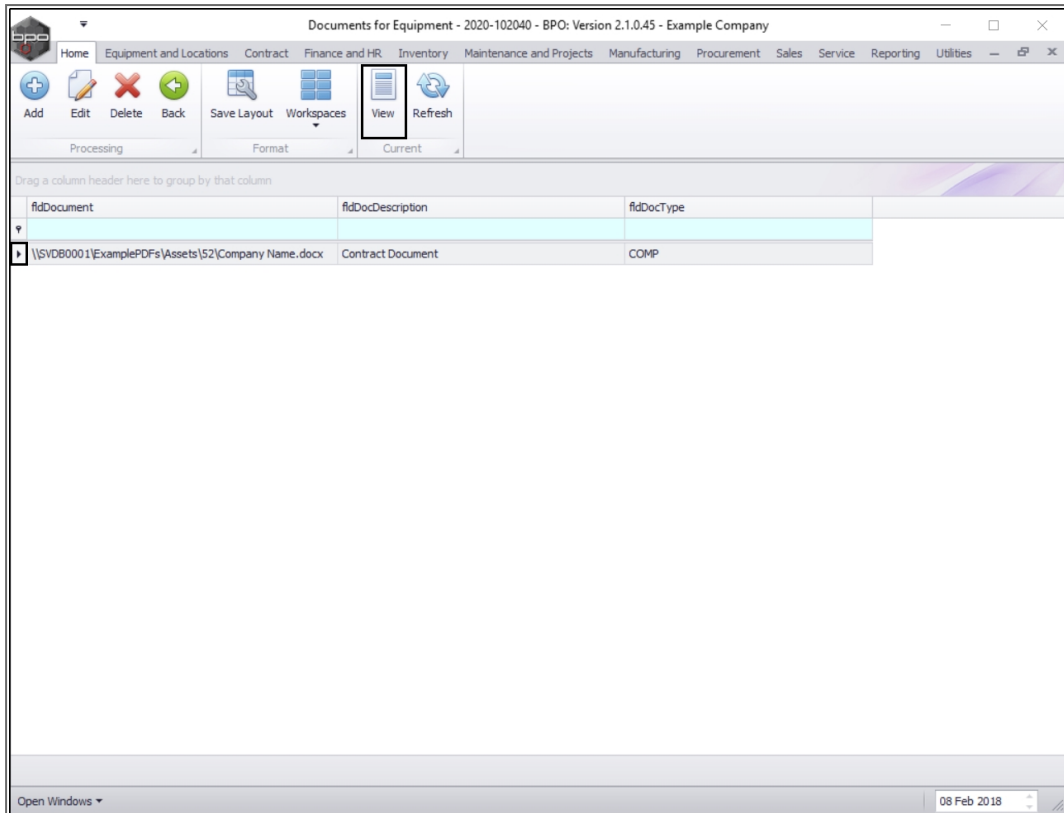
1. The document will open with the relevant program, for example, a **PDF** will open in **Adobe Reader**, a **Word** document will open the **Microsoft Word** application (if installed on your PC).
2. Close this screen to return to the **Documents for Equipment []** screen.
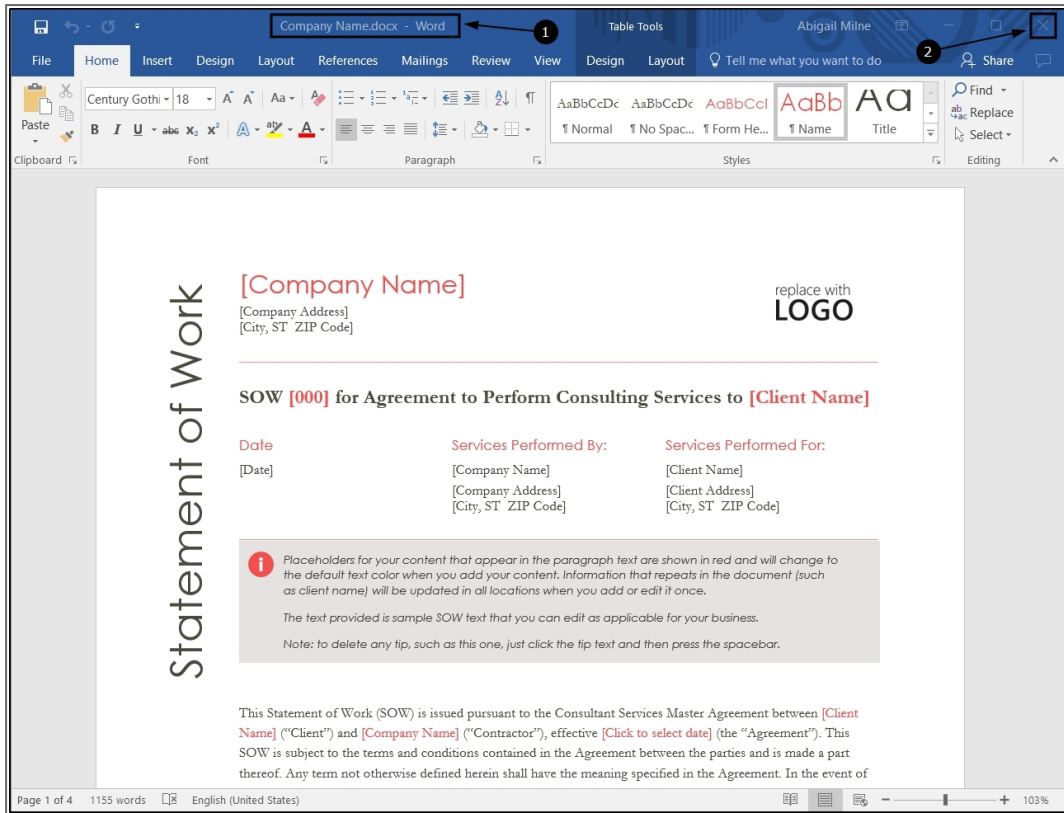
ADD A DOCUMENT

SELECT ASSET

- In the **Machine List for []** screen, select the **row** of the **asset** where you wish to **add** a document.
- Click on the **Documents** tile.

1. The **Documents for Equipment - []** screen will open.
2. Click on **Add**.
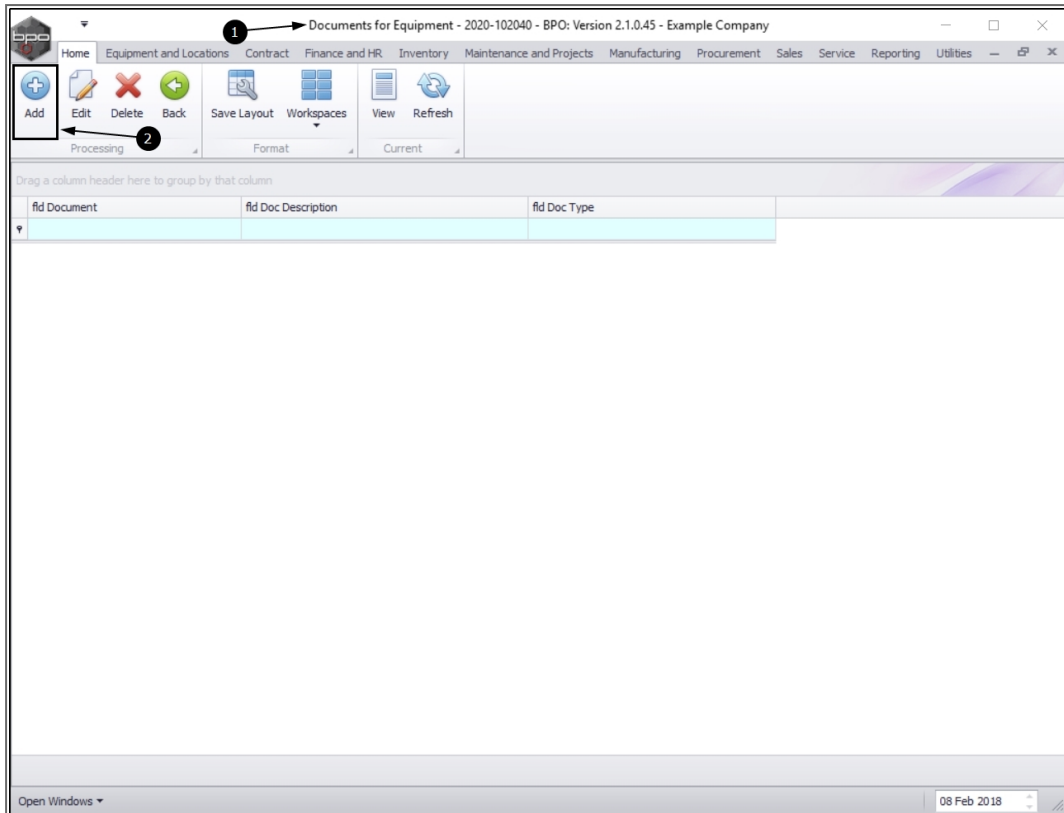
ADD DOCUMENT FILE AND PATH DETAILS
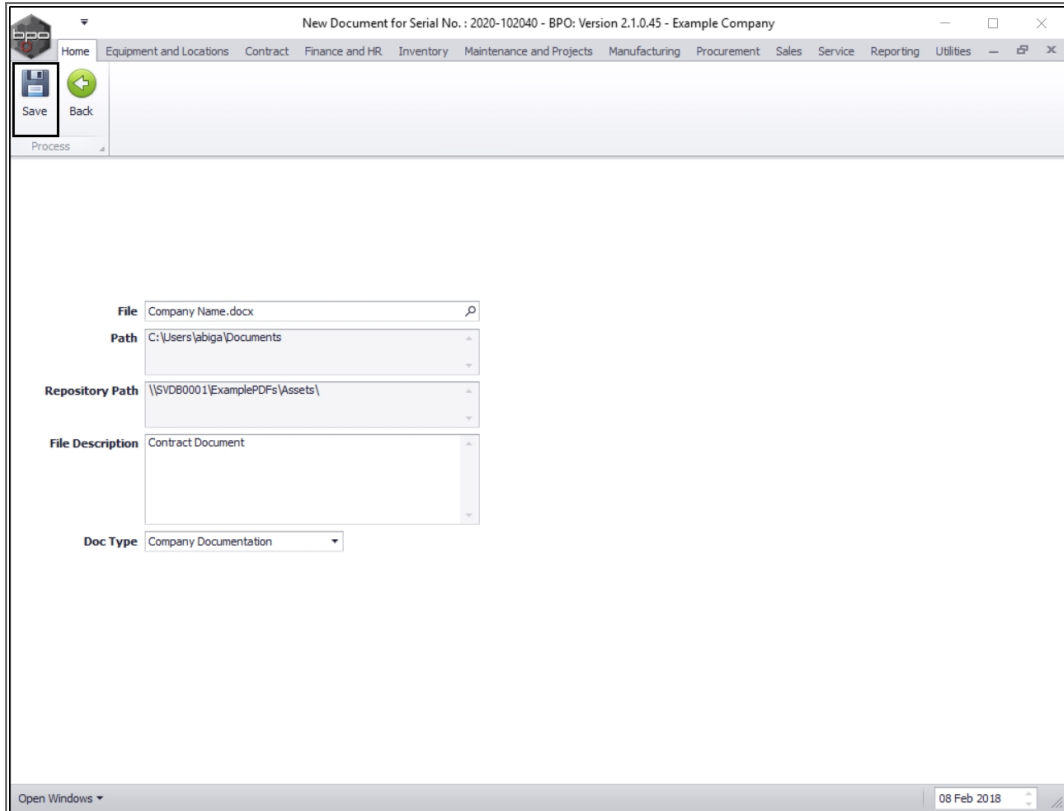
- **File:** Click on the **search** button and browse your computer for the file you wish to attach.
- **Path:** This will auto populate according to the selected file.
- **Repository Path:** This will be auto populated with the configured location - Document Repository Path.
- **File Description:** Type in the **title** or a **description** for this document.
- **Doc Type:** Click on the **drop-down arrow** and select the appropriate Document Type from the list.

SAVE ADDED DOCUMENT

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

- You will return to the **Documents for Equipment - []** screen.
- A **Document Processing** message box will pop up informing you:
  - The document: [] for equipment [] has been saved.
- Click on **OK**.
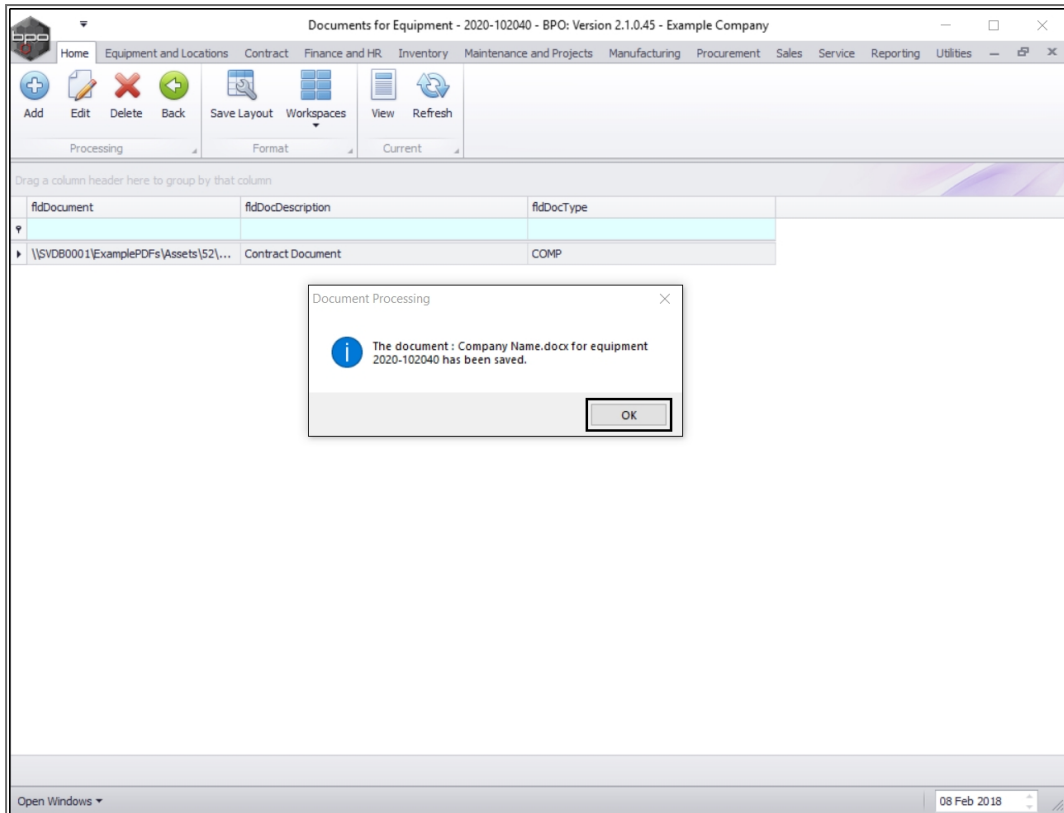
VIEW ADDED DOCUMENT

- You can now **view** the linked document detail listed in this screen.

EDIT A DOCUMENT

1. In the **Machine List for []** screen,
2. Select the **row** of the **asset** where you wish to **edit** a document.
3. Click on the **Documents** tile.
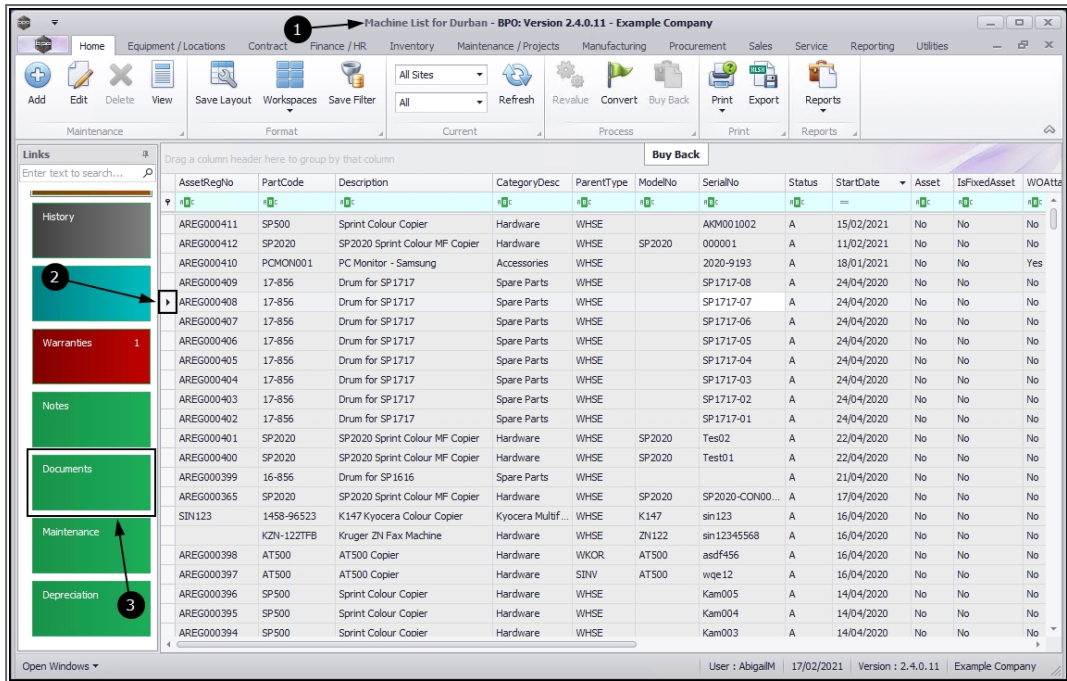
1. The **Documents for Equipment - []** screen will open.
2. If there is <u>more than one</u> linked document in the list, select the **row** of the document that you wish to edit.
3. Click on **Edit**.
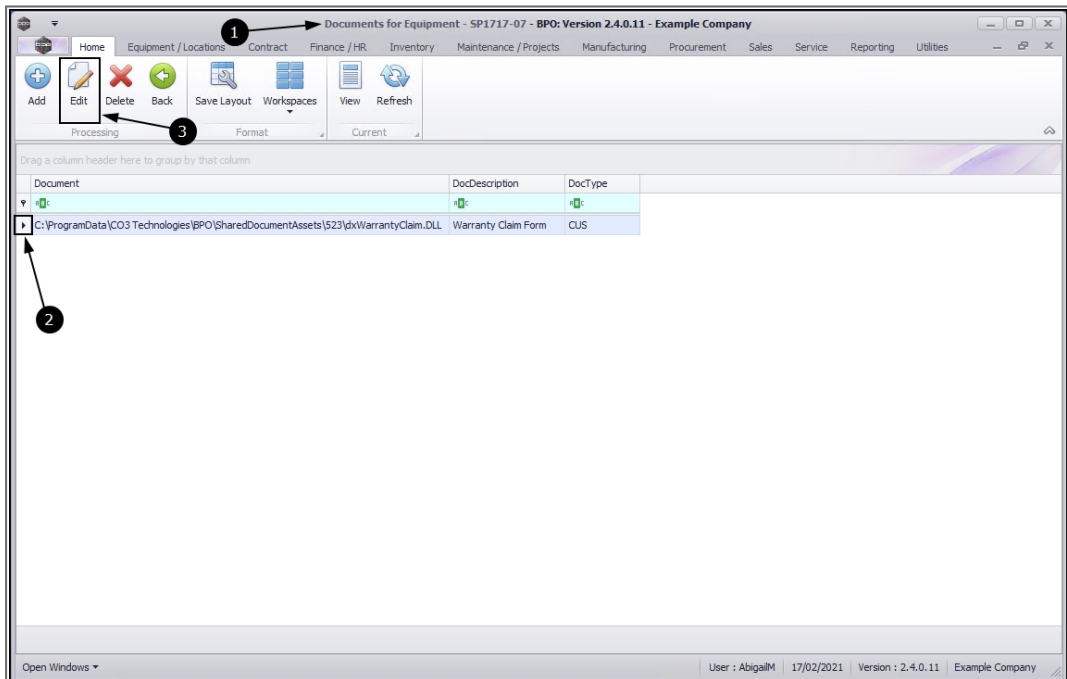
1. A **Document** message box will pop up:
   - Are you sure you want to edit the document, '[]' for []?
2. Click on **Yes**.

1. The **Document Maintenance for Serial No.: []** screen will open.
2. Only the **File Description** and **Doc Type** fields are editable from this screen.
3. If you need to make changes to the **File** and **Path** fields, you will need to delete this document link from the **Documents for Equipment - []** screen as explained above and add the document with the correct file and the correct path.
4. If required, the **Repository Path** will need to be edited in the Con-figurator.
5. Make the required changes to the relevant fields and click on **Save**.
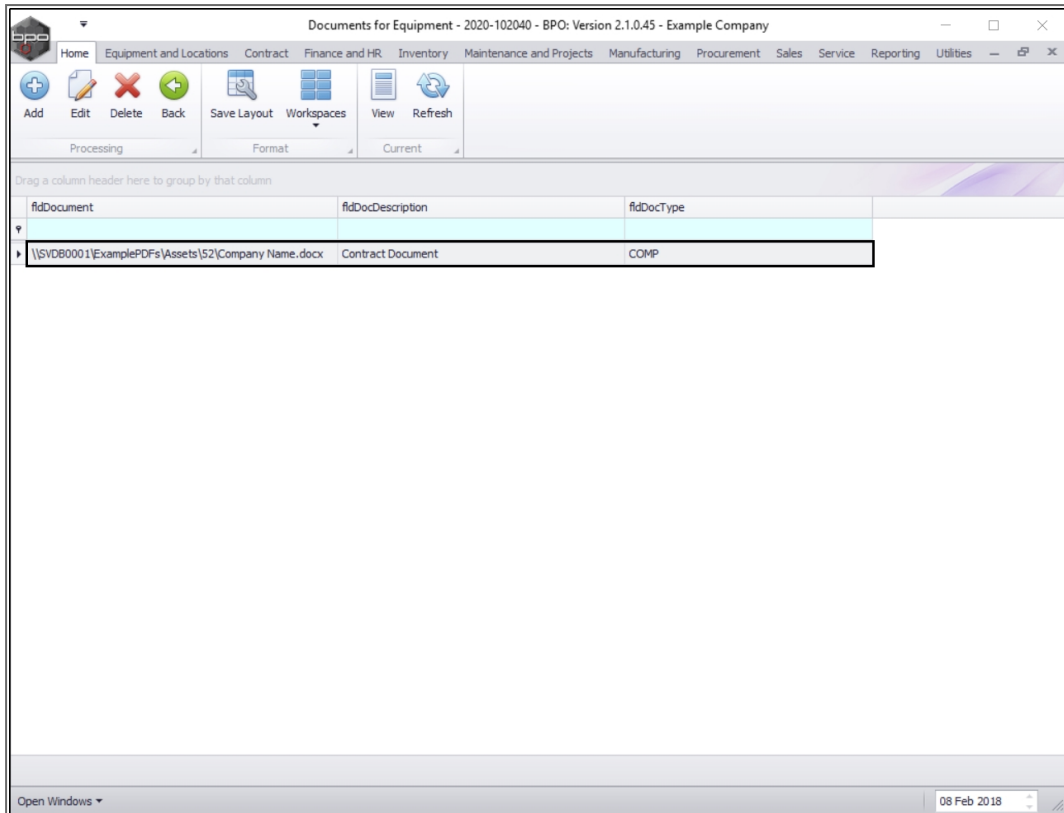
1. You will return to the **Documents for Equipment - []** screen.
2. A **Document Processing** message box will pop up:
    -   The document, [] has been saved.
3. Click on **OK**.
4. Click on **Back** to return to the **Machine List for []** screen.
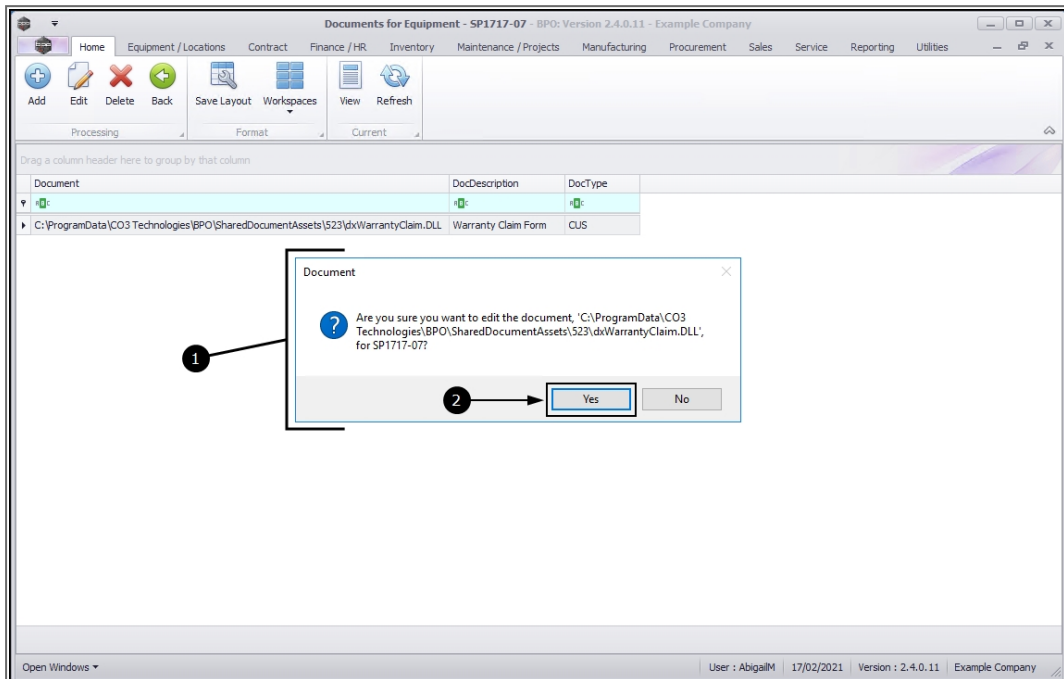
DELETE A DOCUMENT

1. In the **Machine List for []** screen,
2. Select the **row** of the **asset** where you wish to **delete** a document.
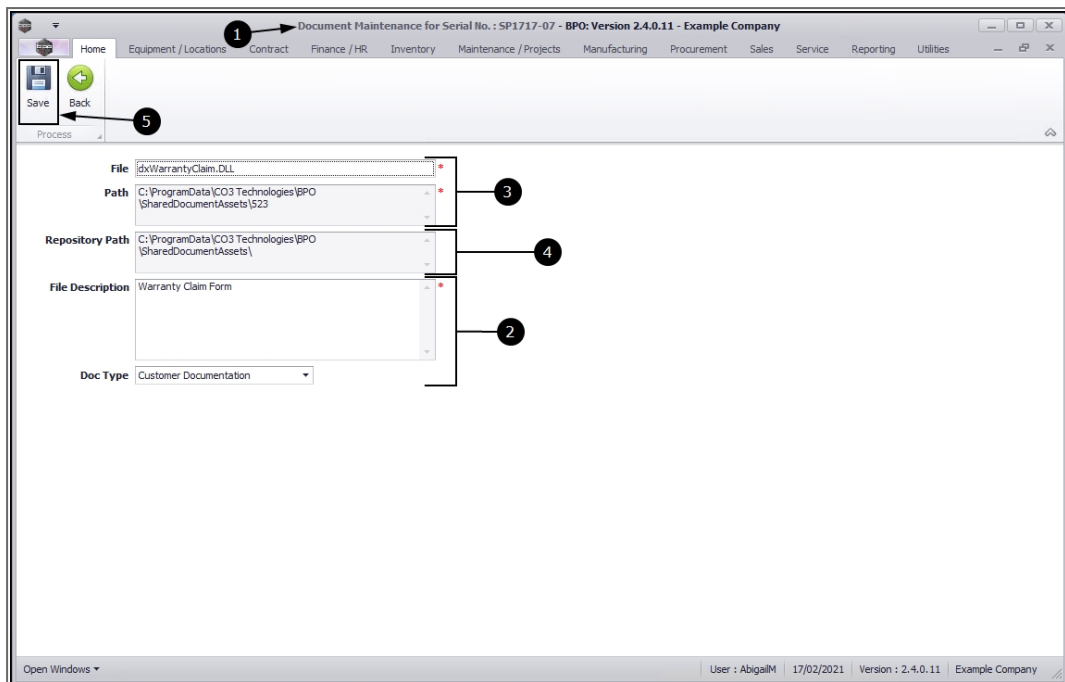3. Click on the **Documents** tile.

1. The **Document Maintenance for Serial No.: []** screen will open.
2. If there is <u>more than one</u> linked document in the list, select the **row** of the document that you wish to delete.
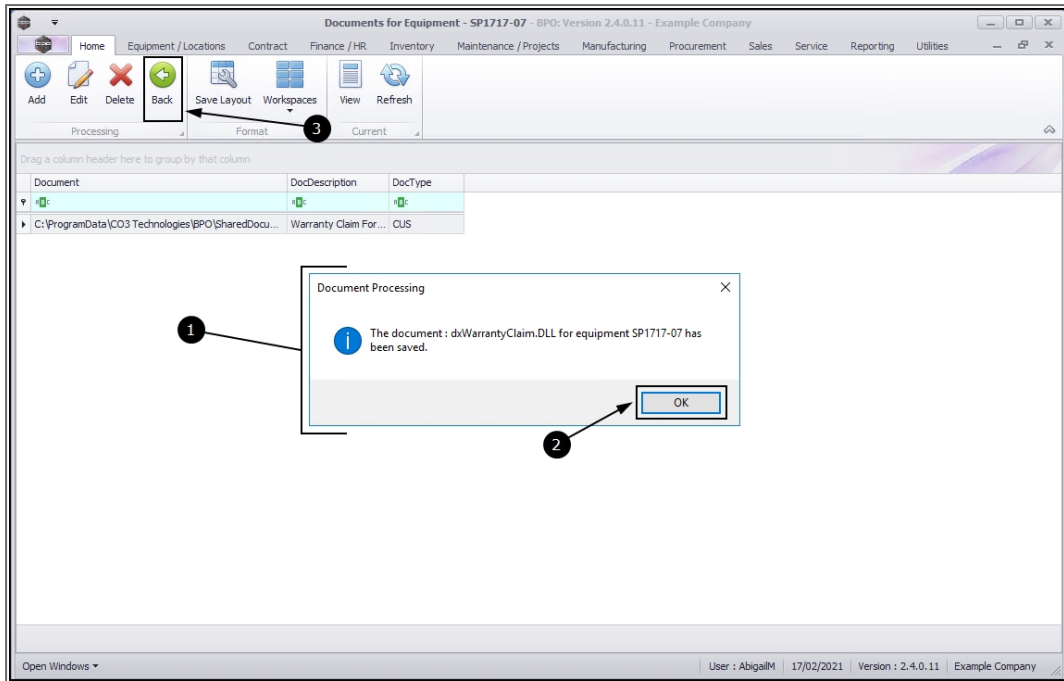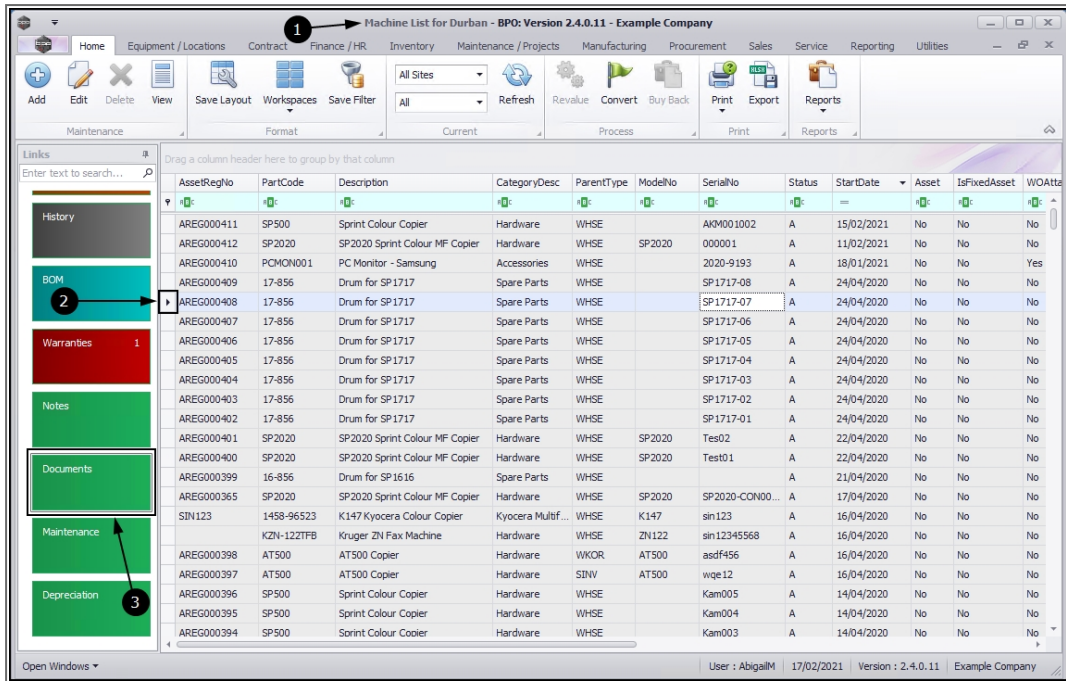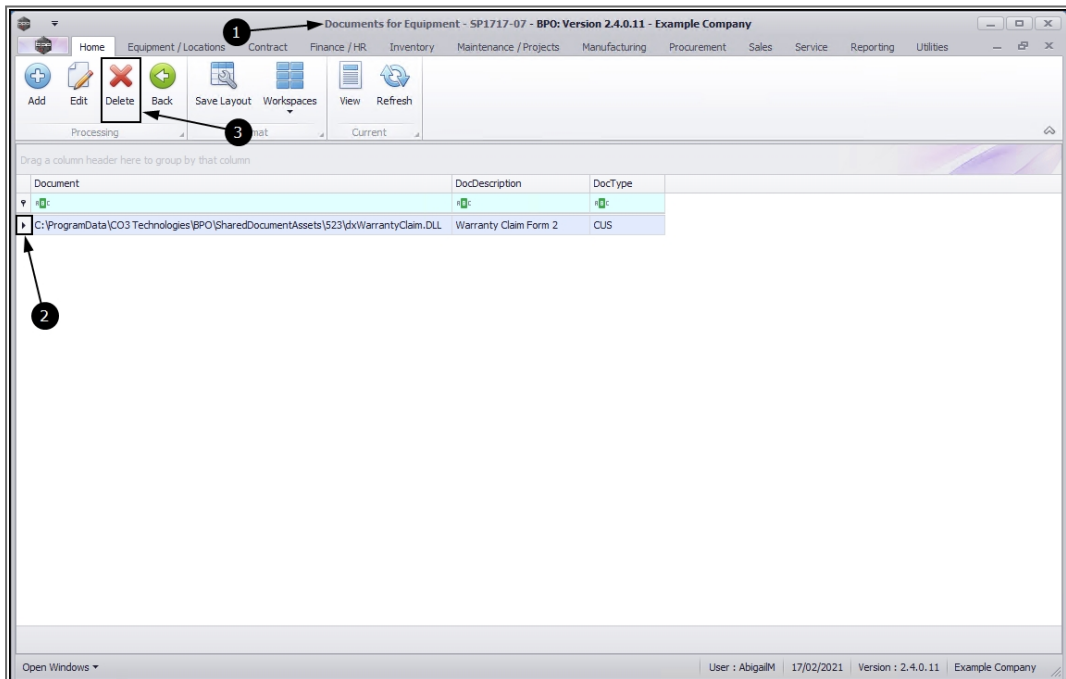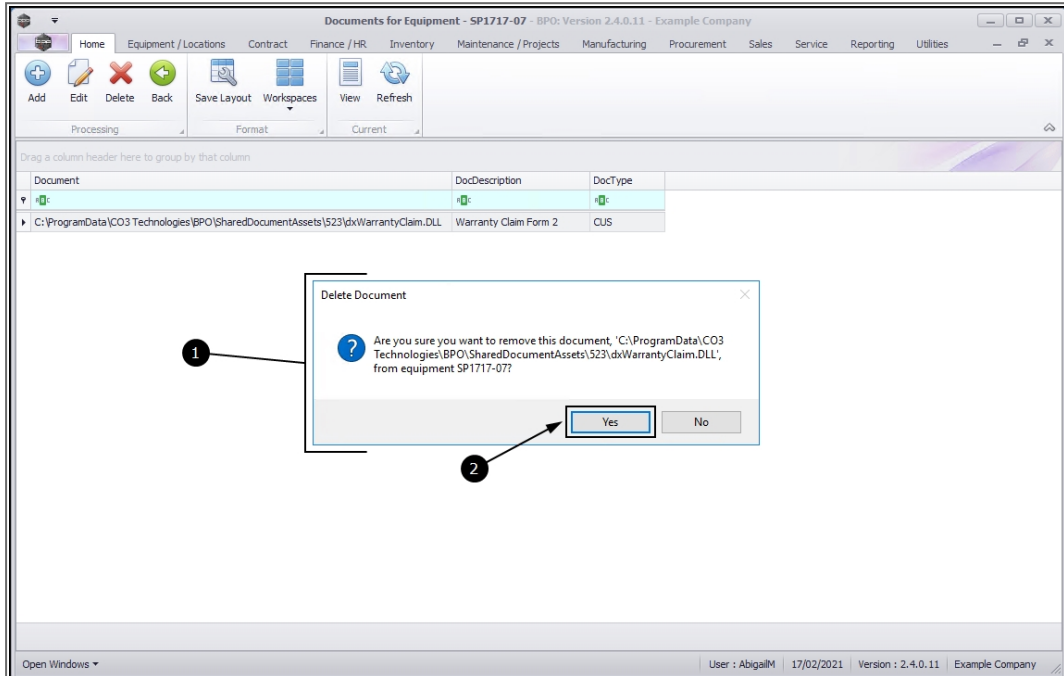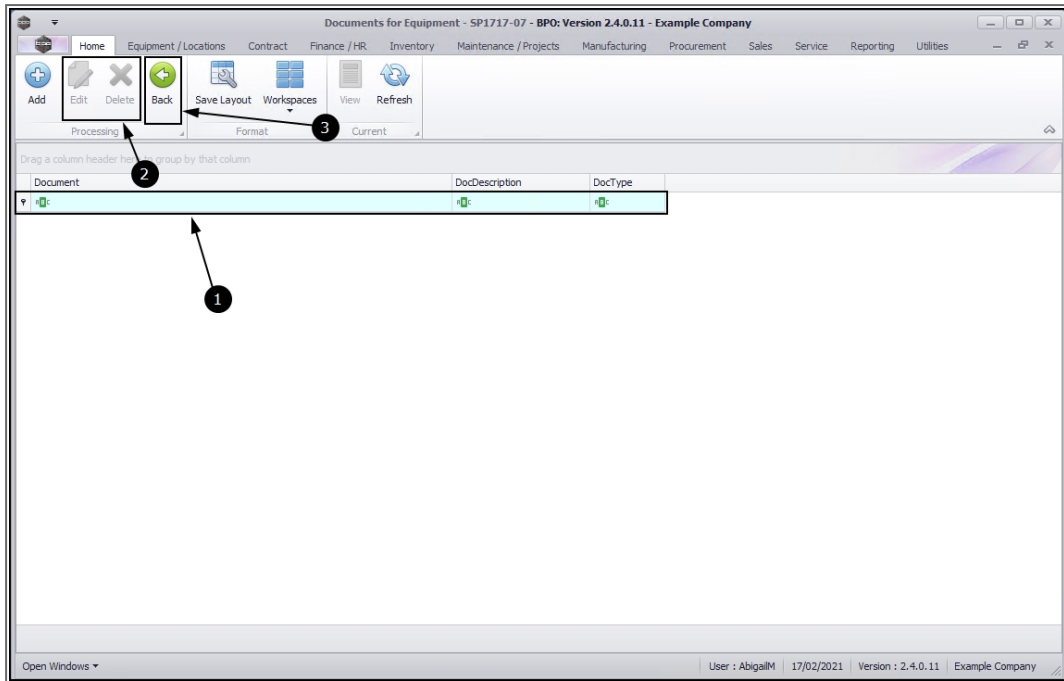3. Click on **Delete**.

1. A **Delete Document** message box will pop up:
   - Are you sure you want to remove this document, '[]' from equipment []?
2. Click on **Yes**.

1. The selected document will be **removed** from the Documents data grid.
2. You will note that the **Edit** and **Delete** buttons are now <u>inactive</u> (greyed out) this is because, in this example, there are <u>no</u> documents left in this screen to edit or remove.
3. Click on the **Back** button to return to the **Machine list for []** screen.

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