

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

# MAINTENANCE

## INSTRUCTIONS - ADD / EDIT / DELETE AND VIEW DIGITAL DOCUMENTS

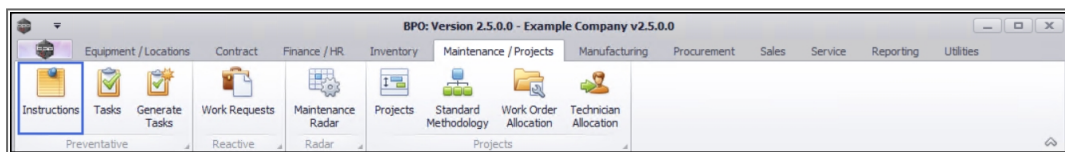
You can scan in and link documents relating to the [task instruction](#).

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

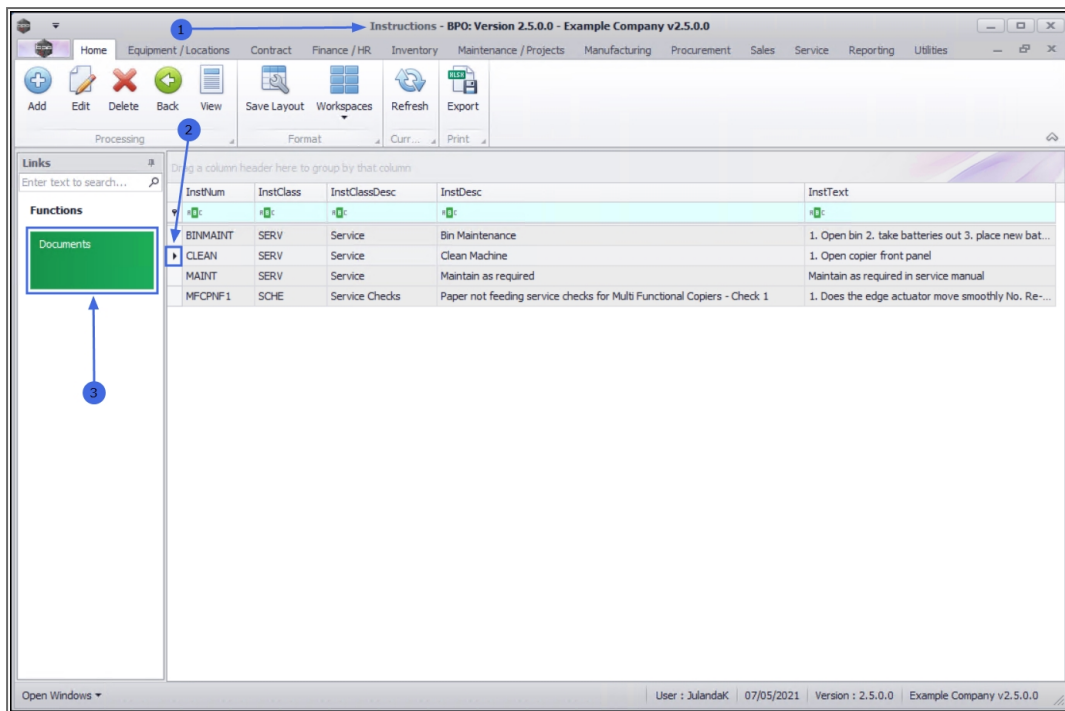
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**Ribbon Access:** Maintenance / Projects > Instructions

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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.

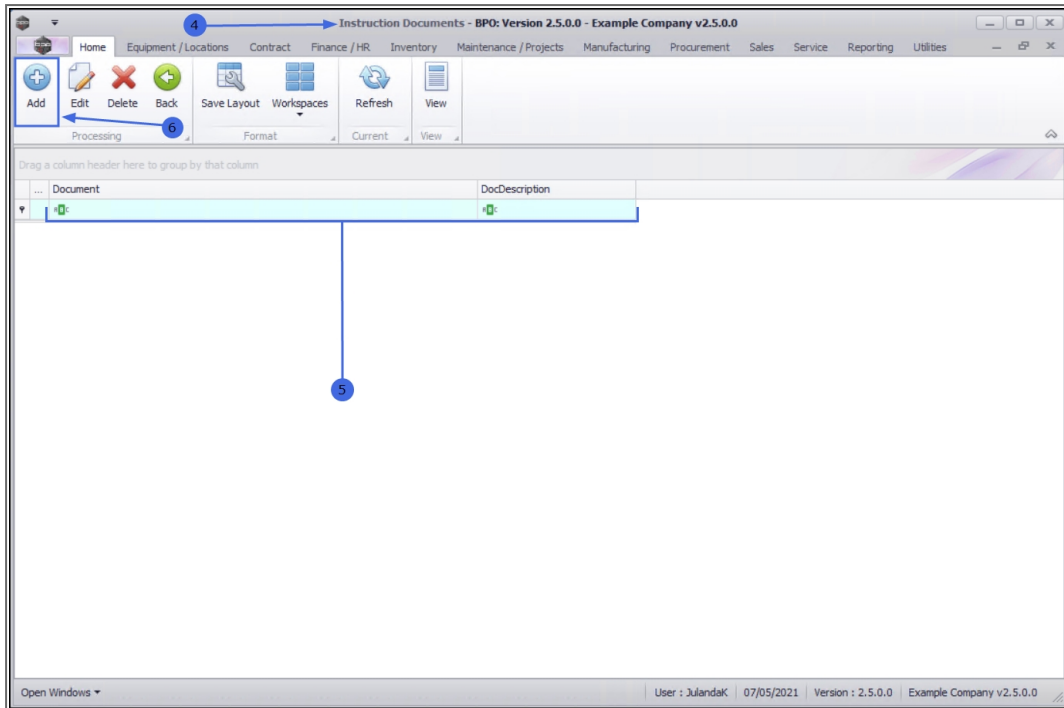


## ADD A DIGITAL DOCUMENT


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**.



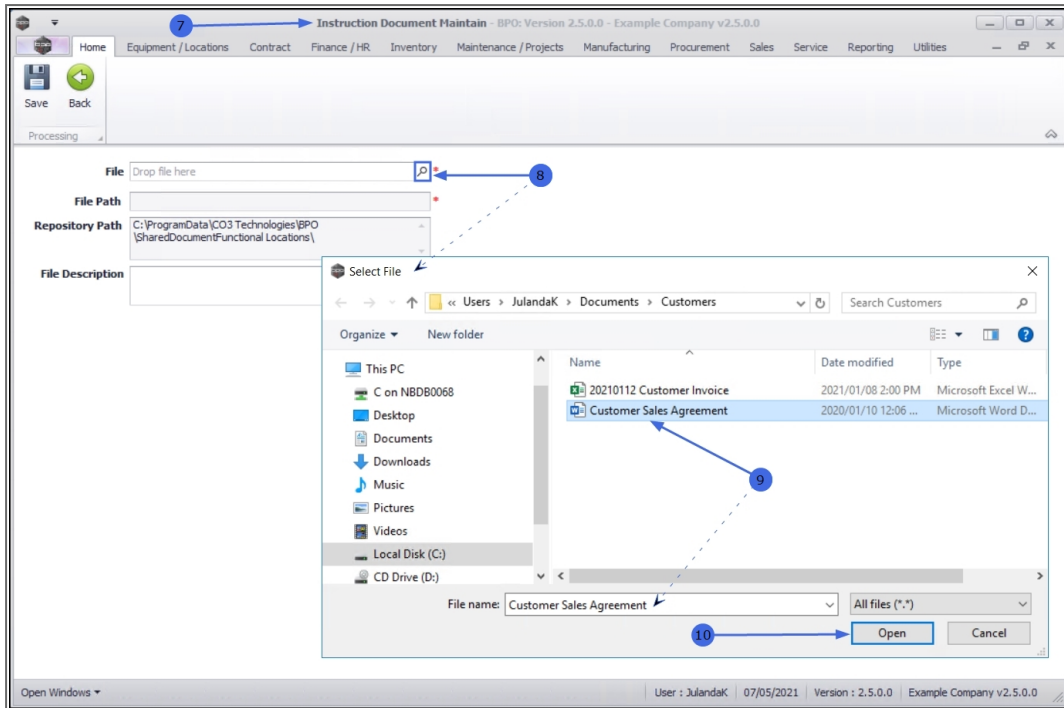
Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



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**.

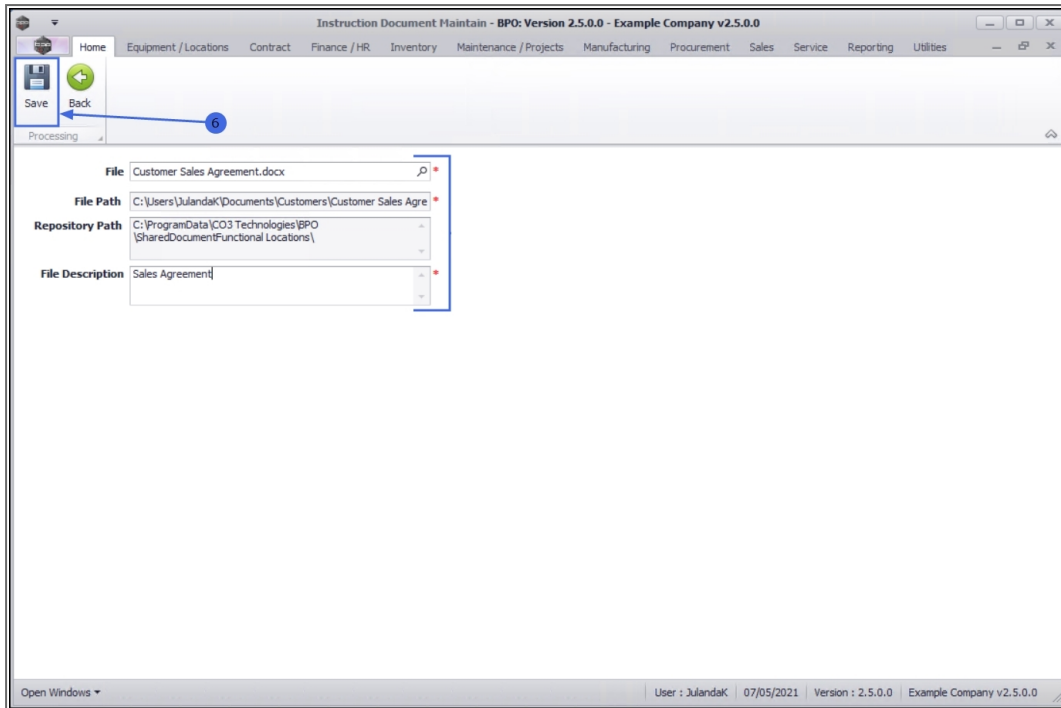


## FILE LOCATION DETAILS

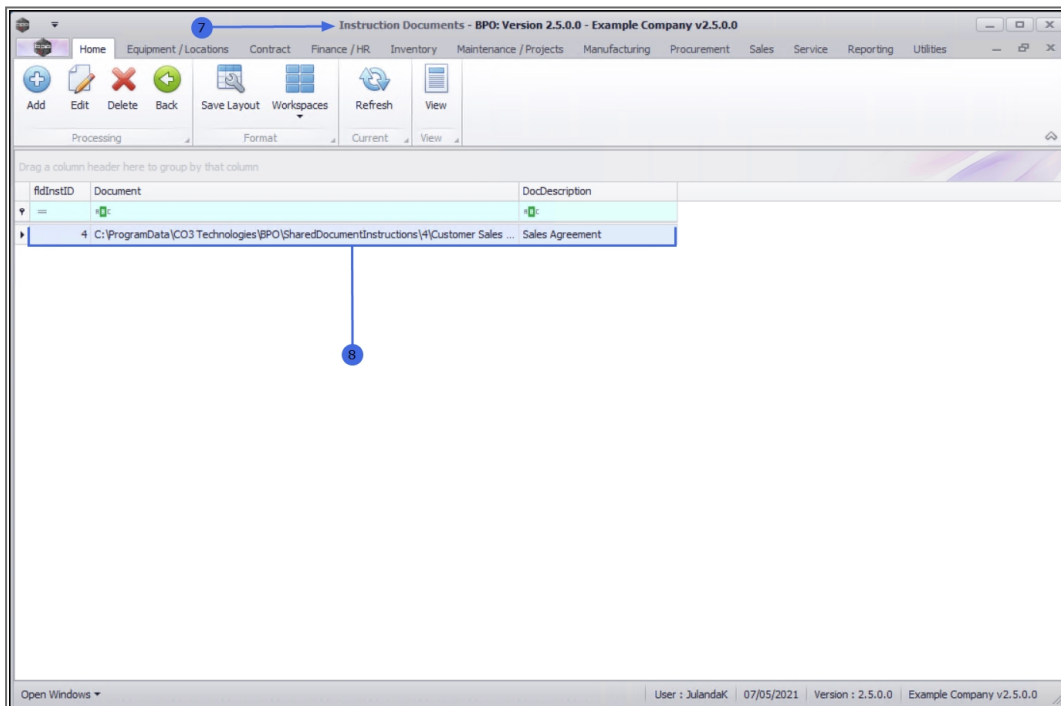
- **File:** This field is populated with the selected **file name**.
- **File Path:** This field is populated with the selected **file path**.
- **Repository Path:** This field will populate with to the repository path set up in the Configurator.
- **File Description:** Click in the text box and type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



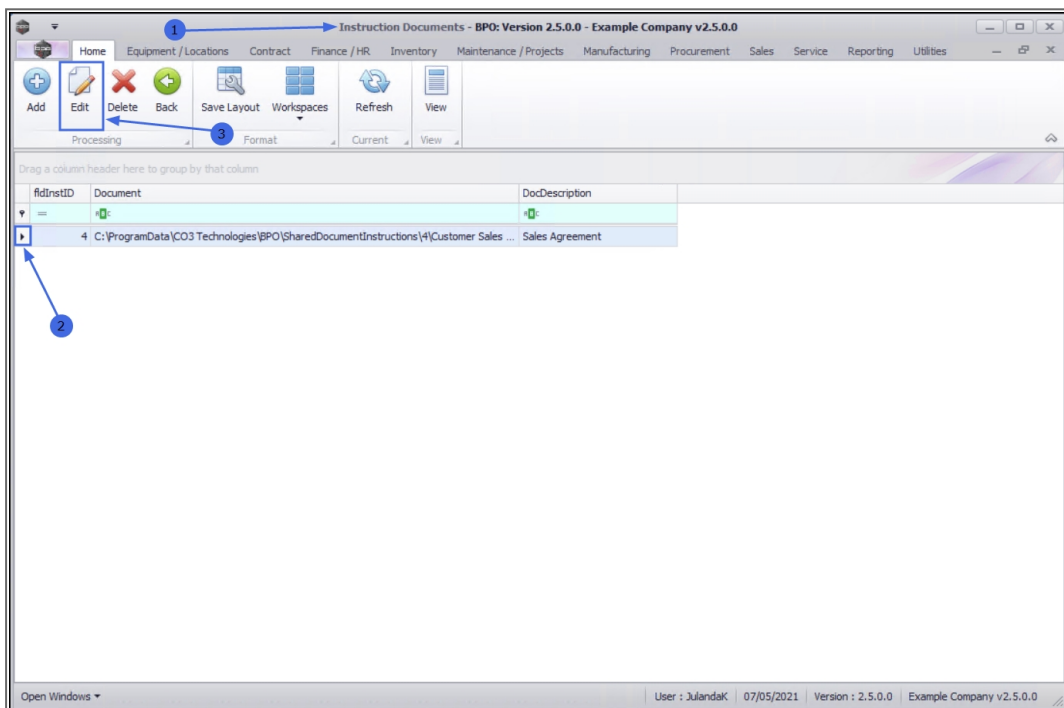
## EDIT A LINKED DOCUMENT

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.

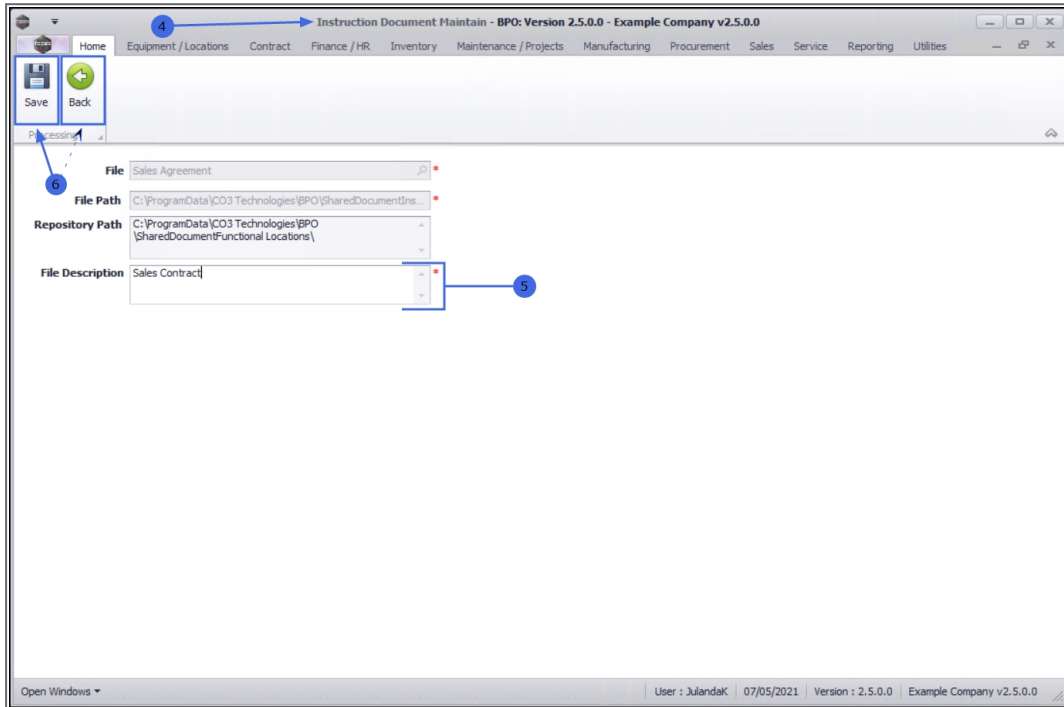


Note that the fields for File, File Path and Repository Path have been greyed out indicating that they cannot be changed.

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

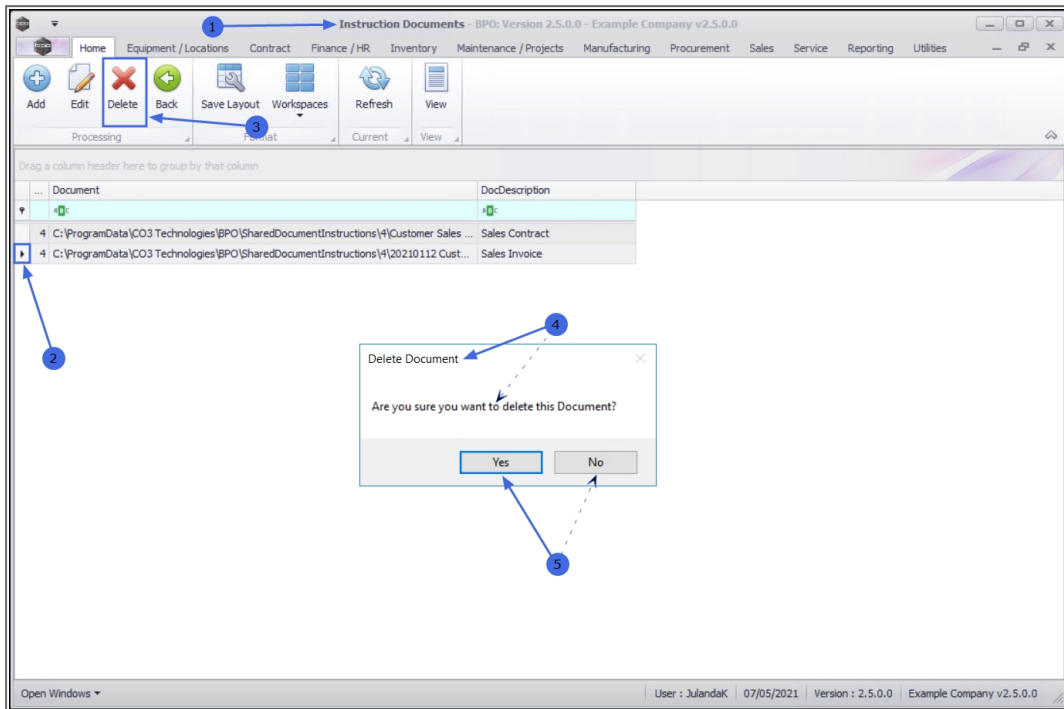
1. From the **Instruction Documents** listing screen,
2. Click in the **row** of the document you wish to delete from the instruction.
3. Click on **Delete**.



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

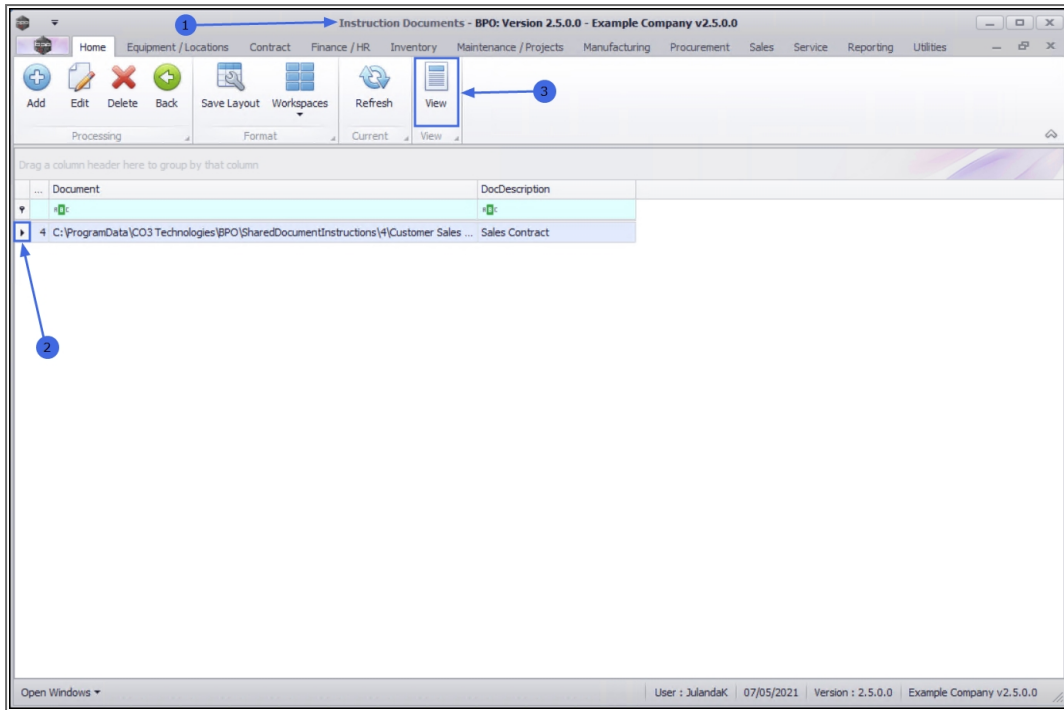
The View feature allows you to view and edit the content of the linked document.

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

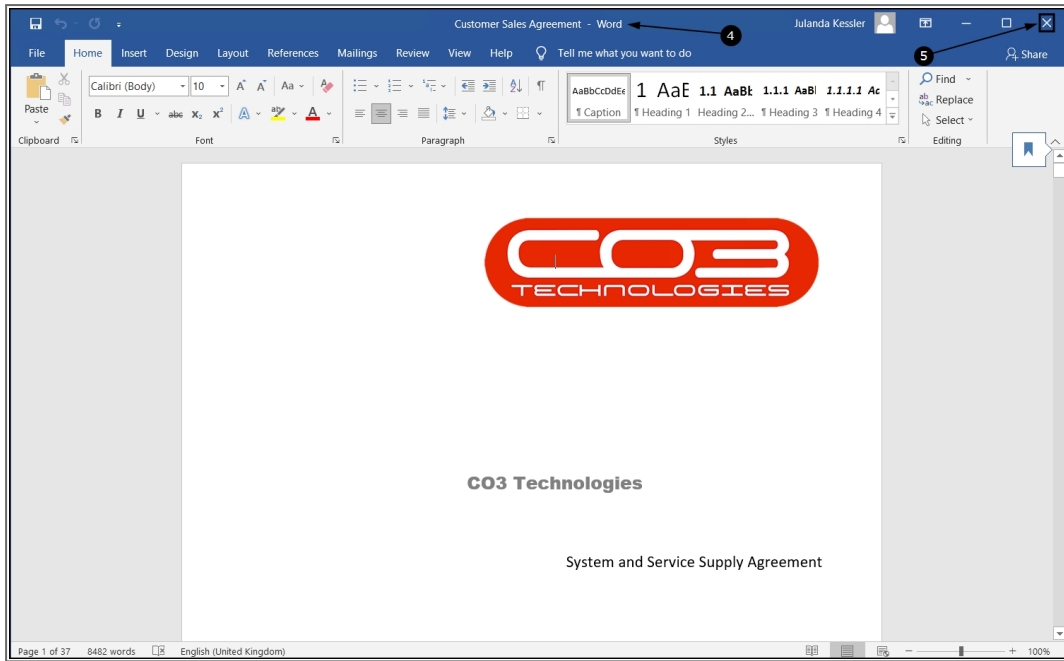


**Short cut key: Right click to display the All groups menu list. Click on View.**

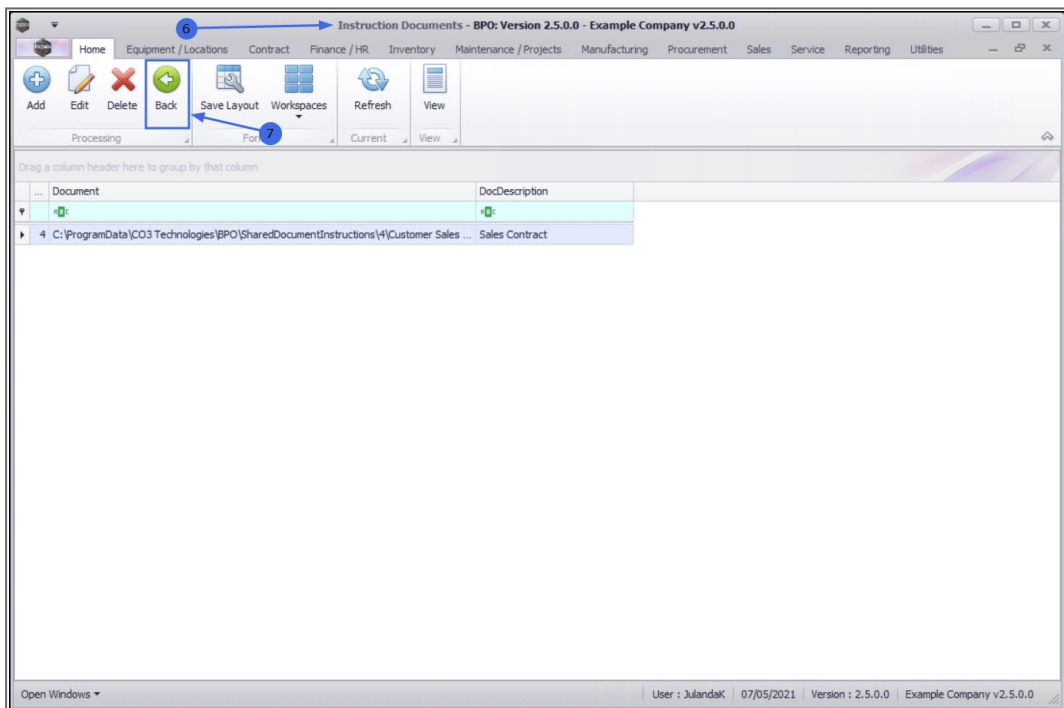




4. The document will open in the **software format** that it was created in, e.g Microsoft Word or Excel.
  - The example has the Sales Contract saved as a Microsoft Word document.
  - Make the necessary changes and **save** the document in Microsoft Word.
5. **Close** Word or Excel.



6. You will return to the **Instruction Documents** screen.
7. Click on **Back** to return to the Instructions listing screen.



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