

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

CONTRACT

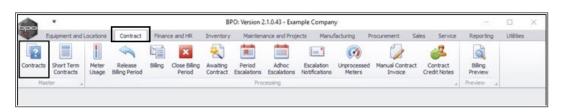
CONTRACTS - DOCUMENTS

It may be necessary to link digital documents to a contract which can then be viewed by all parties with the required security rights.

These documents should be saved in a shared folder on the server (which can be secured with permissions, where required), otherwise the document(s) will not open.

Follow the process to **view**, **add**, or **delete** documents for a contract.

Ribbon Access: Contract > Contracts



The **Contract Listing** screen will display.

- Select the **Site** that you wish to work in.
 - ° In this example, **Durban** is selected.



Contracts - Documents

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This screen defaults to the **Active** status.

• Select a different **status** from the drop-down, menu if required.



Contracts - Documents

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VIEW DOCUMENTS

- Select the **row** of the contract where you wish to **view** the linked documents.
- Click on the **Documents** tile.

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Contracts - Documents

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The Document listing for Contract - [] screen will open.

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• Here you can **view** a list of the digital documents currently linked to this contract.

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ADD DOCUMENT

• In the **Document Listing for Contract - []** screen, click on **Add**.

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The New Document for Contract No. :[] screen will open.

• File: Click on the search button in the file field.



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- The Select File screen will pop up.
- Find the document in the **shared folder** on the server.



• Click on **Open**.

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• The **File** and **Path** fields will now populate with the selected file details.

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• The **Repository Path** is auto populated according to the path that has been set up in the company configuration.

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• **File Description:** Type in a description for the document.



• **Type:** Click on the drop-down arrow and select the document type from the menu.

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SAVE DOCUMENT

• When you have finished adding the details to this screen, click on **Save**.



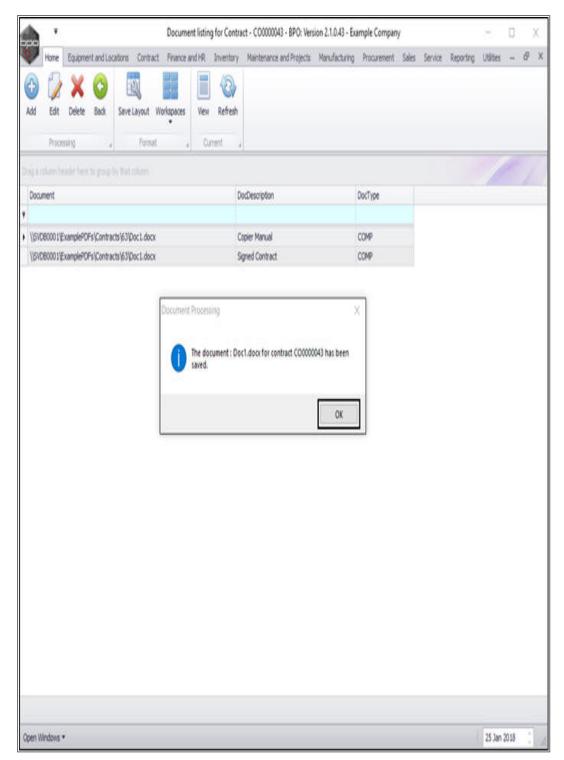
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Doc Type	Company Documen	tation												

• A **Document Processing** message box will pop up advising the following:



° This document: [] for contract [] has been saved.

• Click on OK.





VIEW ADDED DOCUMENT

• You can now see the selected document has been added to the **Document listing for Contract -** [] screen.

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OPEN DOCUMENT

- To **open** and **view** any digital document in the Document listing screen, select the **row**of the document you wish to open.
- Click on View.

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Open Windows *				25 Jan 2	018	: 3

- The selected document will open in your screen.
- **Close** the document screen when you have finished viewing it.





You will return to the **Document listing for Contract - []** screen.

DELETE DOCUMENT

- In the **Document Listing for Contact -** [] screen, select the **row** of the document you wish to remove from the list.
- Click on **Delete**.



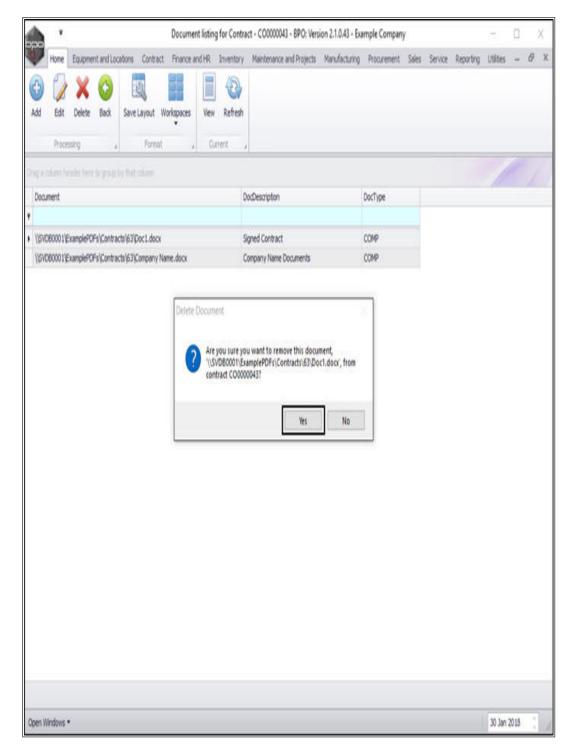
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• A **Delete Document** message box will pop up with the following prompt:

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- Are you sure you want to remove this document [] from contract []?
- Click on Yes.





- The selected document will be removed from this screen.
- Click on **Back** to return to the **Contract Listing** screen.

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