

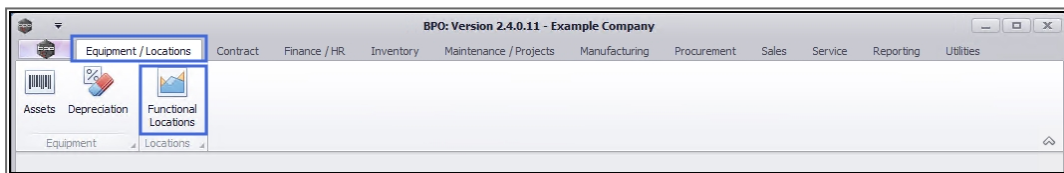
LOCATIONS

FUNCTIONAL LOCATIONS – DOCUMENTS

The **Documents** tile allows you to Add, Edit, Delete and View digital documents linked to a selected location. For example, a Site Plan document. All your location documents can be kept in one place by making use of this link.

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.

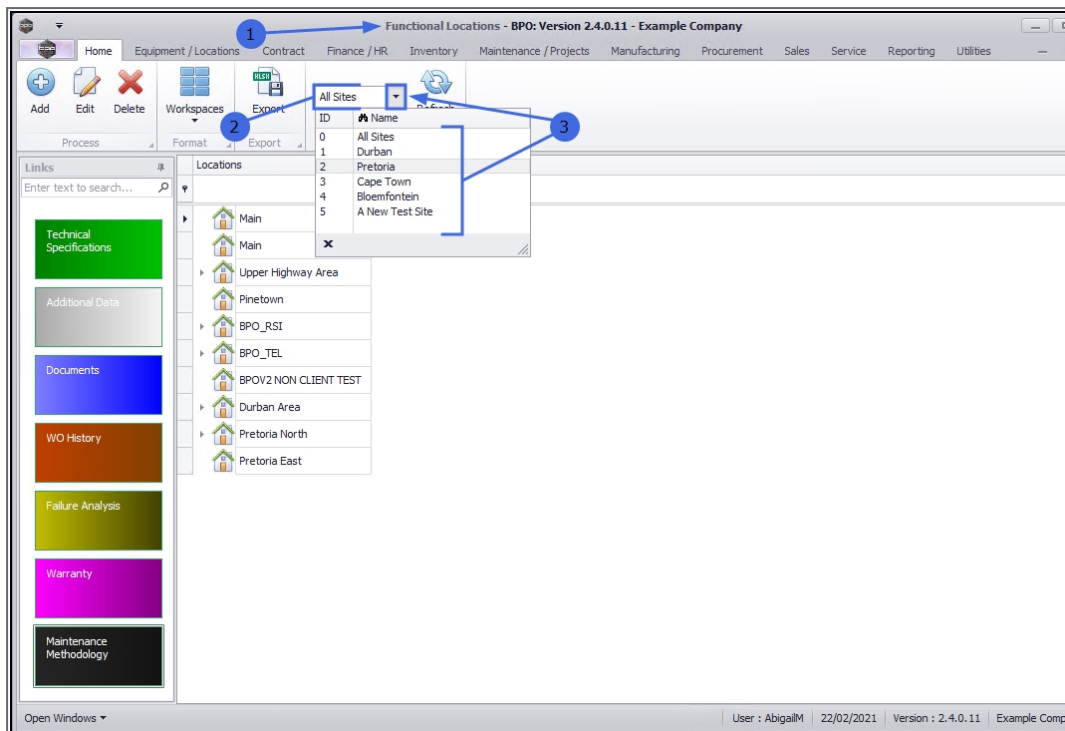
Ribbon Access: *Equipment / Locations > Functional Locations*



1. The **Functional Locations** screen will be displayed.

SELECT THE SITE

2. The **Site** filter will be set according to your company configuration.
3. You do not need to select a specific site, however if you wish to narrow your filter parameters, you can click on the **drop-down arrow** and select a particular site from the list.
 - [For a detailed handling of this topic refer to Site Selection.](#)



SELECT THE LOCATION

1. Select the **row** of the **location** where you wish to link Digital Documents.

MAIN LOCATION

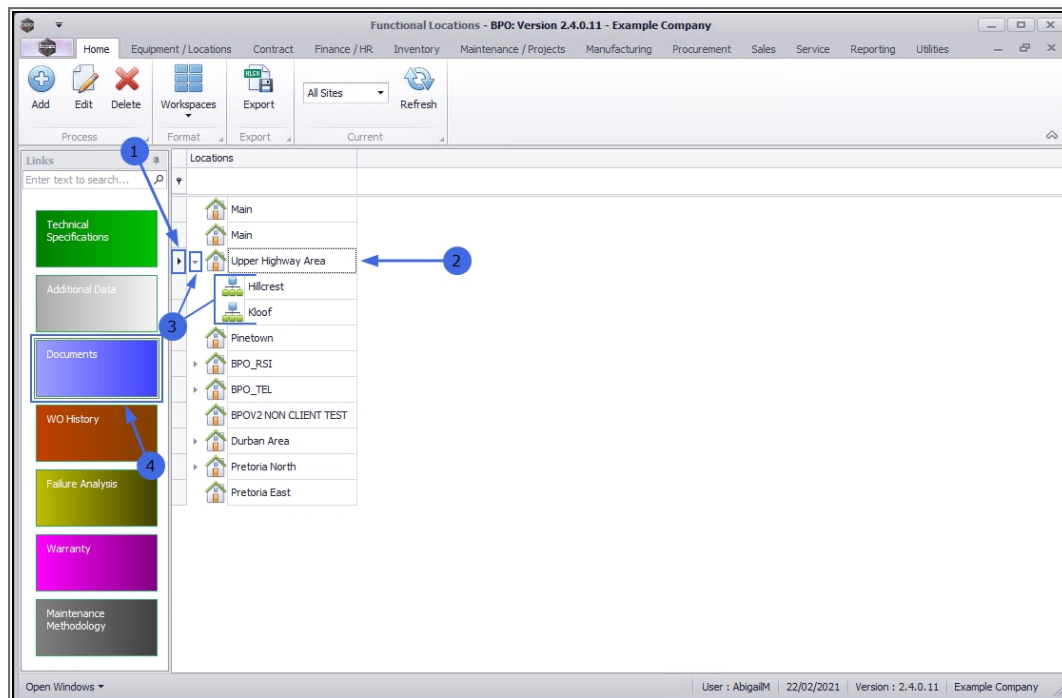
2. If the documents are to be linked to a **main** location, select the **row** of that main location. In this example **Upper Highway Area** is a main location.

SUB-LOCATION

3. If the document is to be linked to a **sub-location**, ensure that you **expand** the main (parent) location to be able to view and select the row of that sub-location. In this example, **Hillcrest** and **Kloof** are sub-loc-

ations of Upper Highway Area.

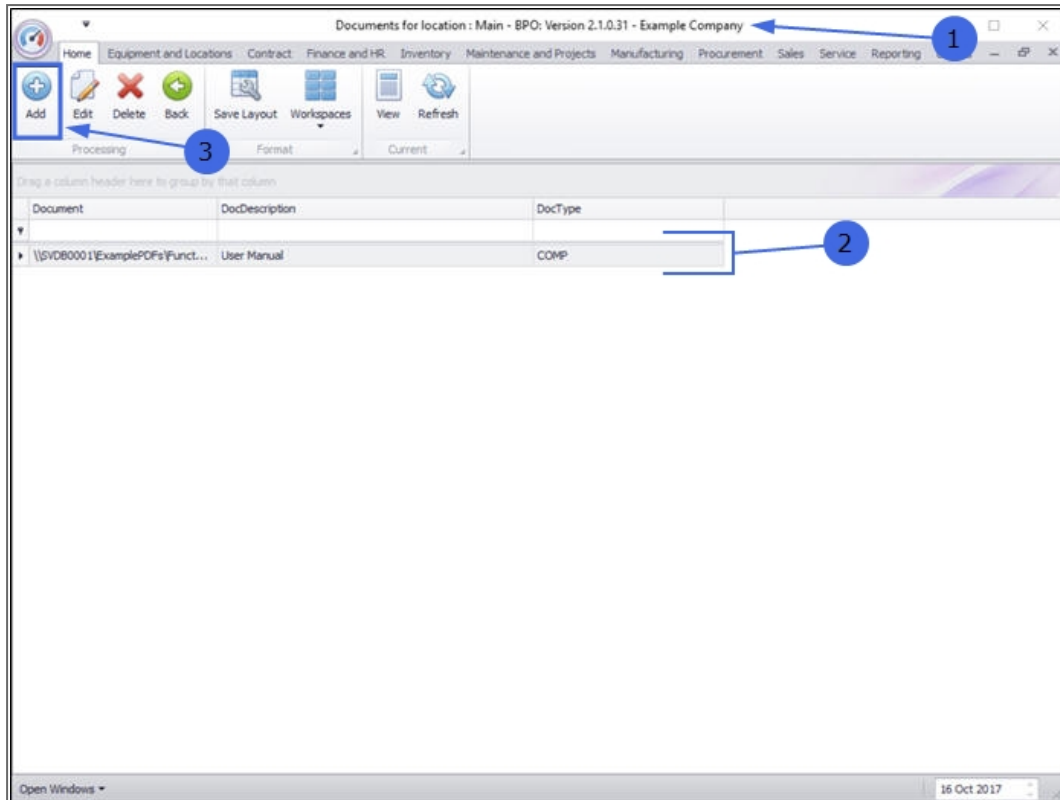
4. When you have selected the right location, click on the **Documents** tile.



1. The **Documents for location: []** screen will open.
2. If there are any documents currently linked to the selected location, they will be listed here.

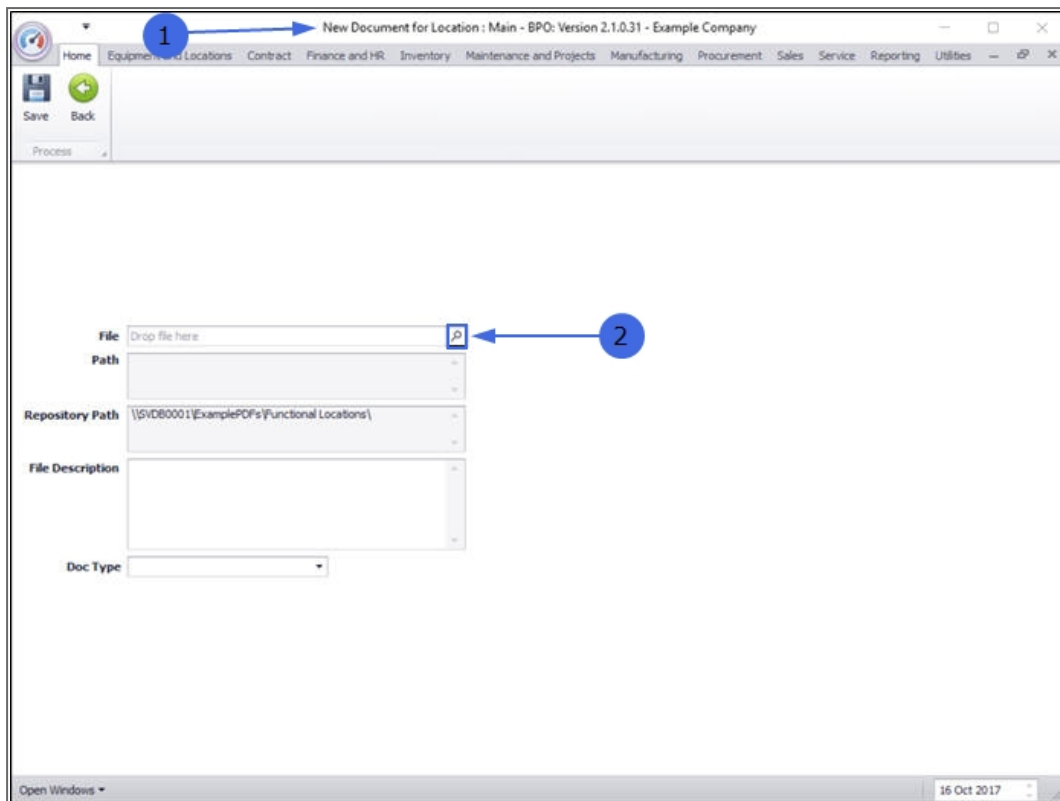
ADD LOCATION DOCUMENT

3. Click on **Add**.



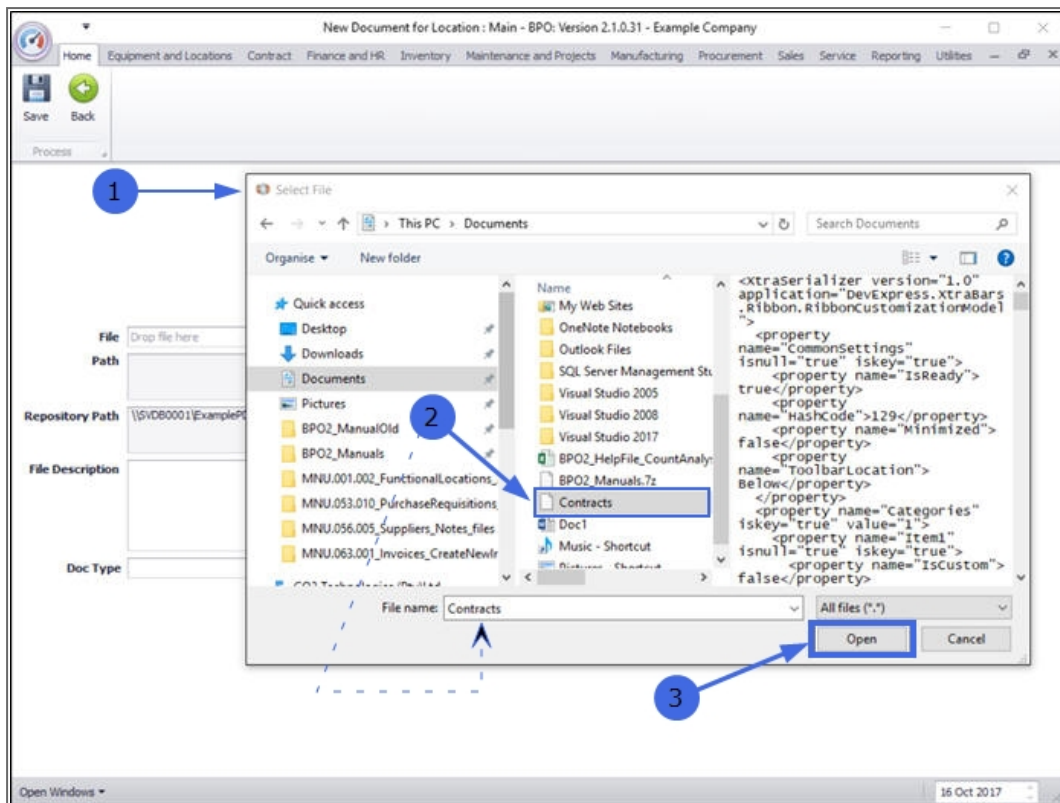
FIND FILE

1. The **New Document for Location: []** screen will open.
2. Click on the **search** button in the **File** field and search for the digital document you wish to link.
 - **Note:** 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.



SELECT FILE

1. From the **Select File** pop up screen,
2. Find the **file** on your **server / computer** that you wish to **link**.
 - Ensure that the document name appear in the **File name:** field by clicking on the document to select it.
3. Click on **Open**.

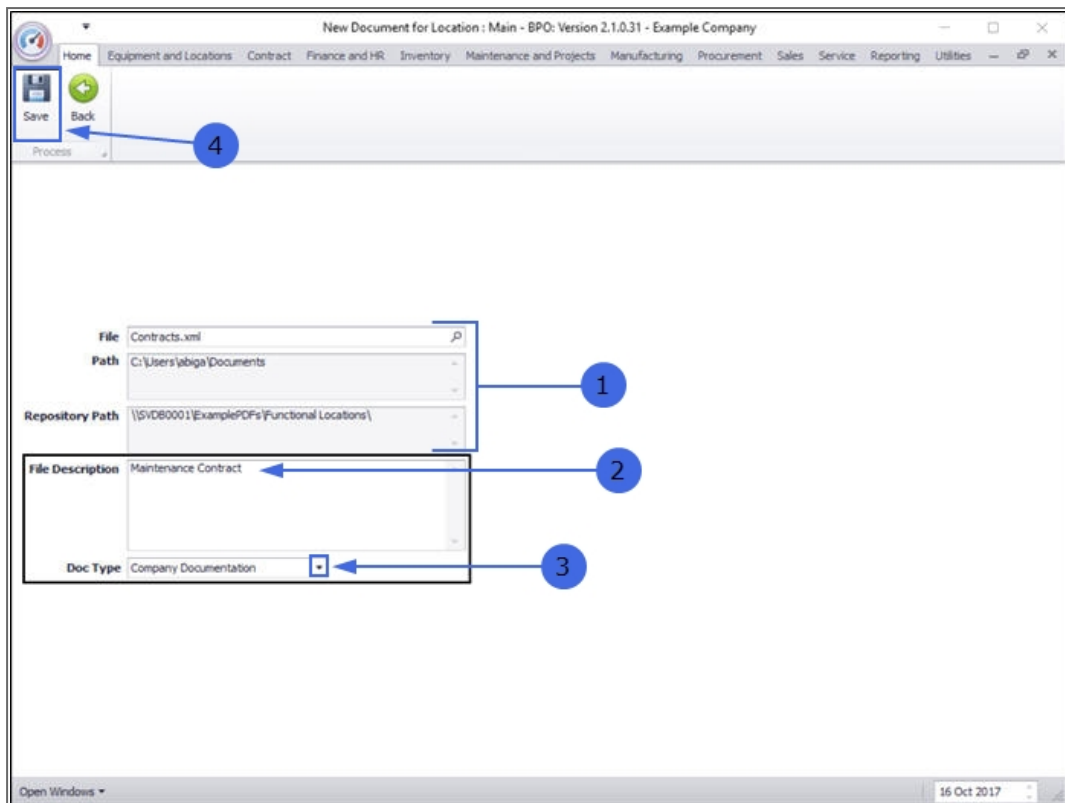


DOCUMENT DETAILS

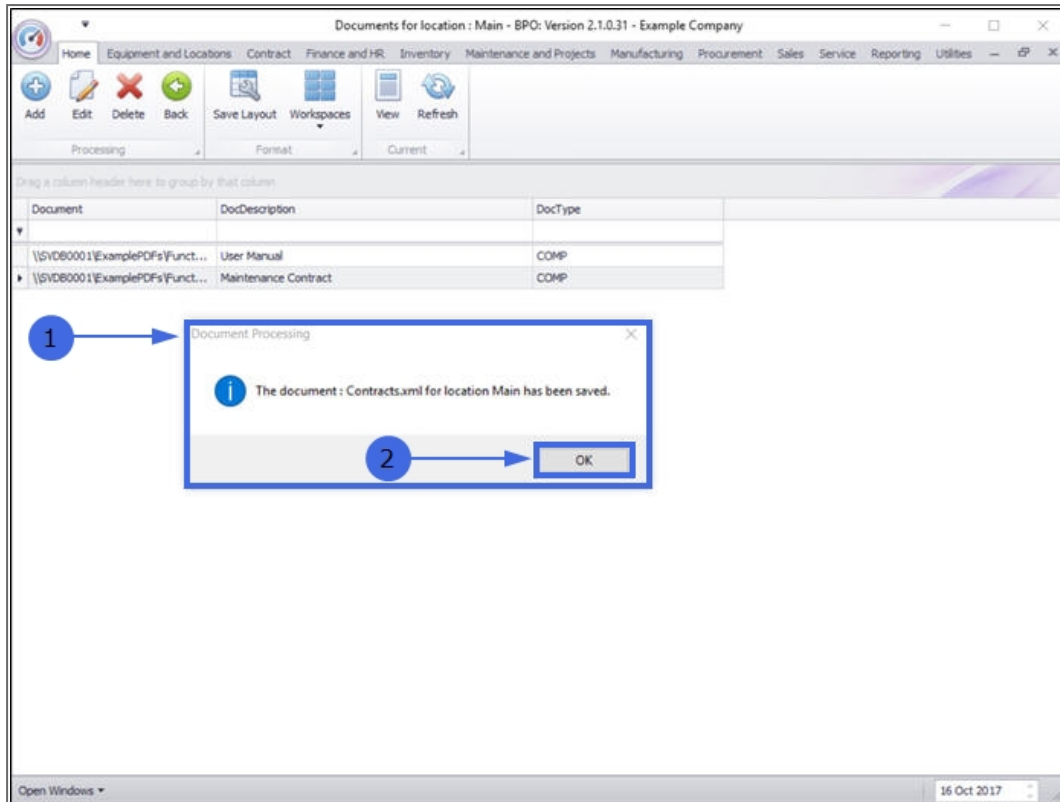
1. The **File** and **Path** and **Repository Path** fields will now auto populate.
2. **File Description:** type in a description for the document you are linking.
3. Click on the drop-down **arrow** in the **Doc Type** field and select a document type from the list.

SAVE DOCUMENT

4. Click on **Save**

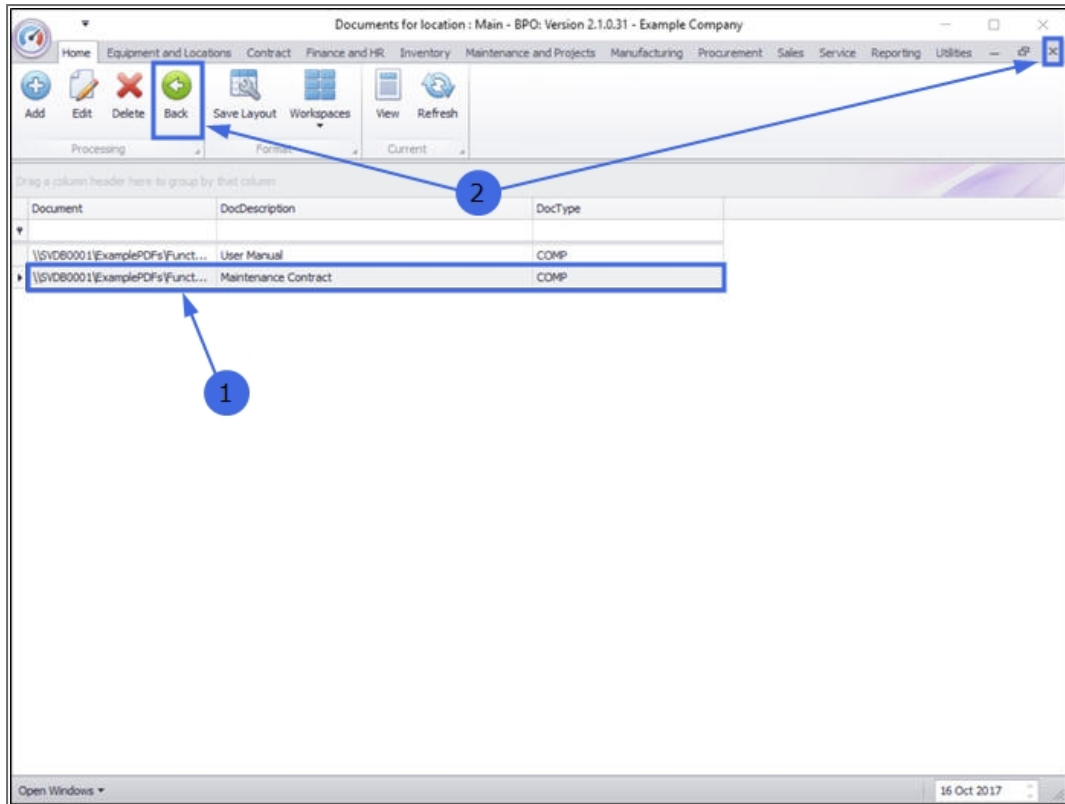


1. A **Document Processing** message box will pop up advising the following:
 - *The document: [] for location [] has been saved.*
2. Click on **OK**.



VIEW LINKED DOCUMENT

- You can now **view** the added document in the **Documents for location: []** screen.
- Click on **Back** or **Close** the screen to return to the **Functional Locations** screen.



Related Topics

- [Introduction to Functional Locations](#)
- [Add a New Functional Location](#)
- [Edit a Functional Location](#)
- [Delete a Functional Location](#)
- [Location - Technical Specifications](#)
- [Location - Additional Data](#)
- [Location - Work Order History](#)
- [Location - Failure Analysis](#)
- [Location - Warranty](#)
- [Location - Maintenance Methodology](#)
- [Location - Add a New Location Contract](#)

MNU.001.004

