

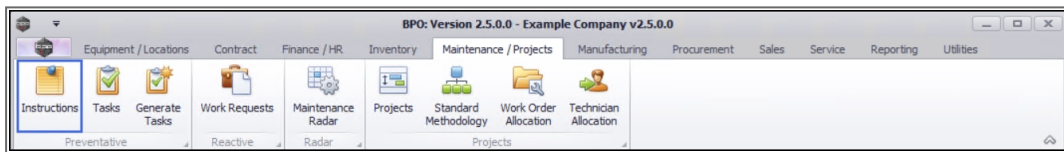
MAINTENANCE

INSTRUCTIONS - ADD / EDIT / DELETE AND VIEW DIGITAL DOCUMENTS

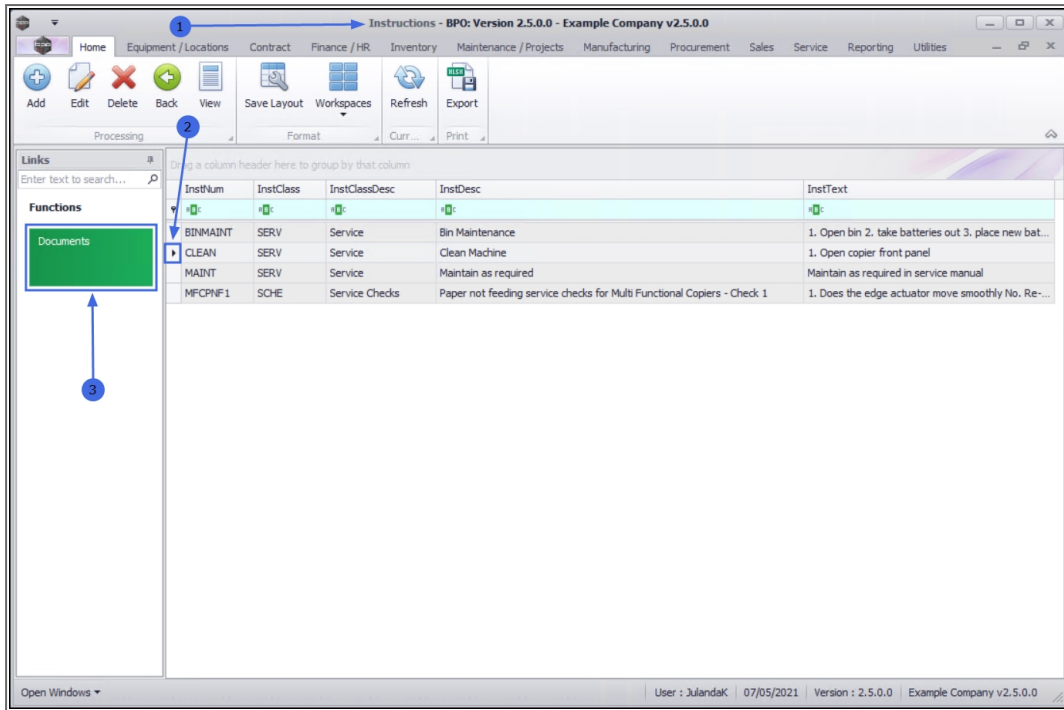
You can scan in and link documents relating to the [task instruction](#).

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

Ribbon Access: *Maintenance / Projects > Instructions*



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.

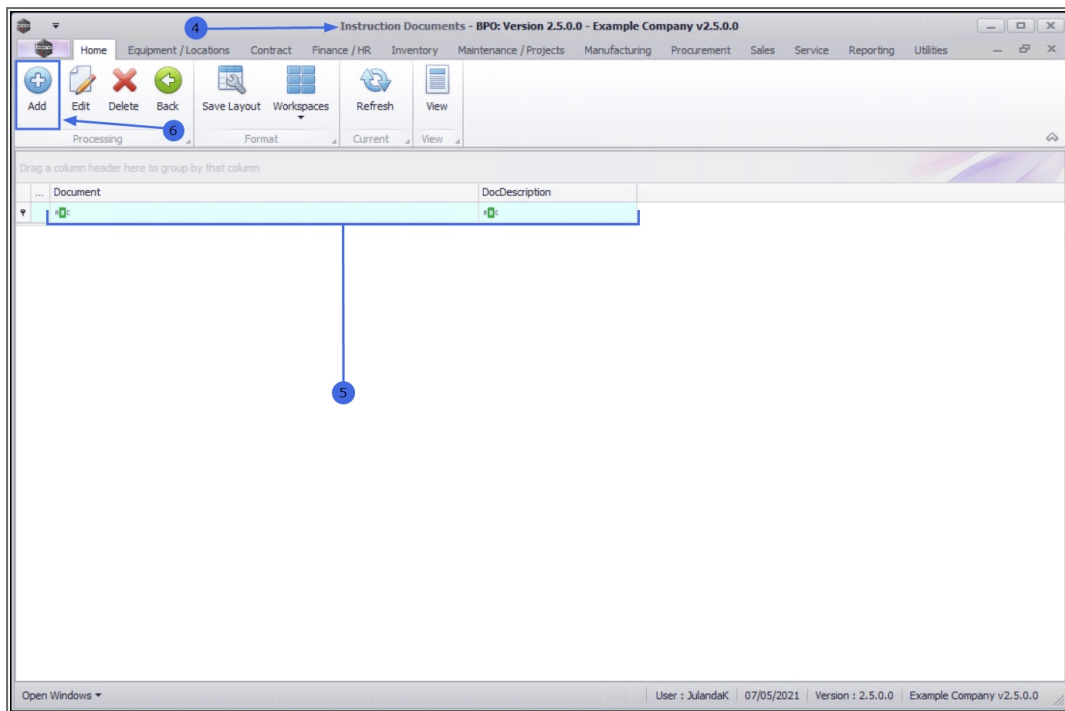


ADD A DIGITAL DOCUMENT


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**.



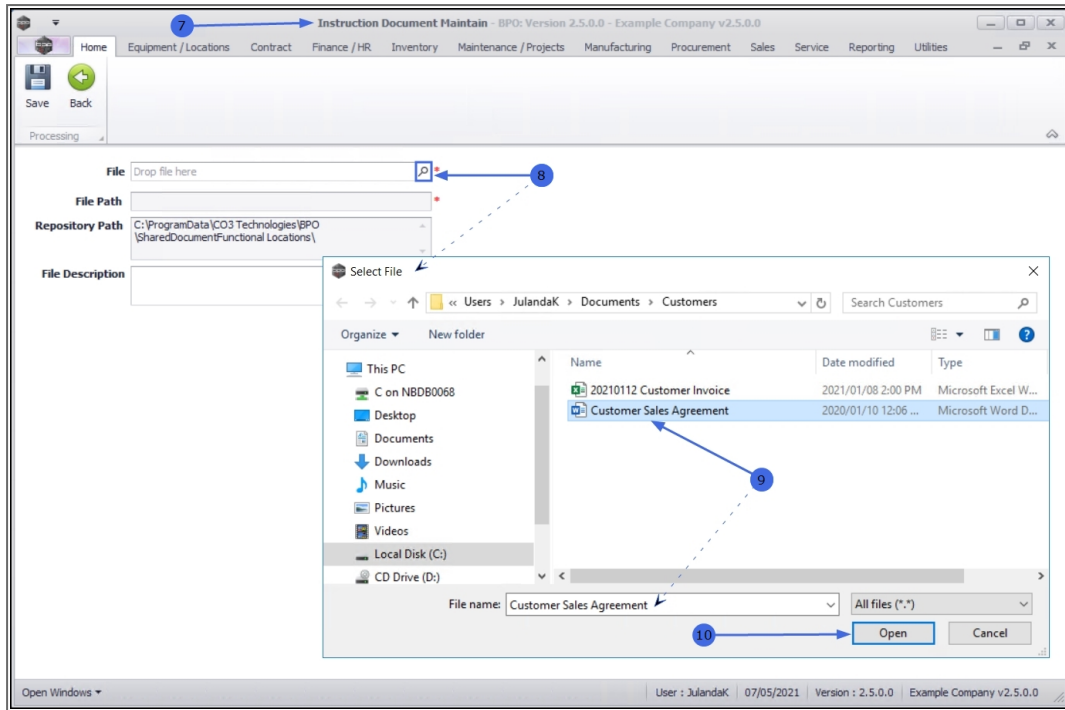
Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



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**.

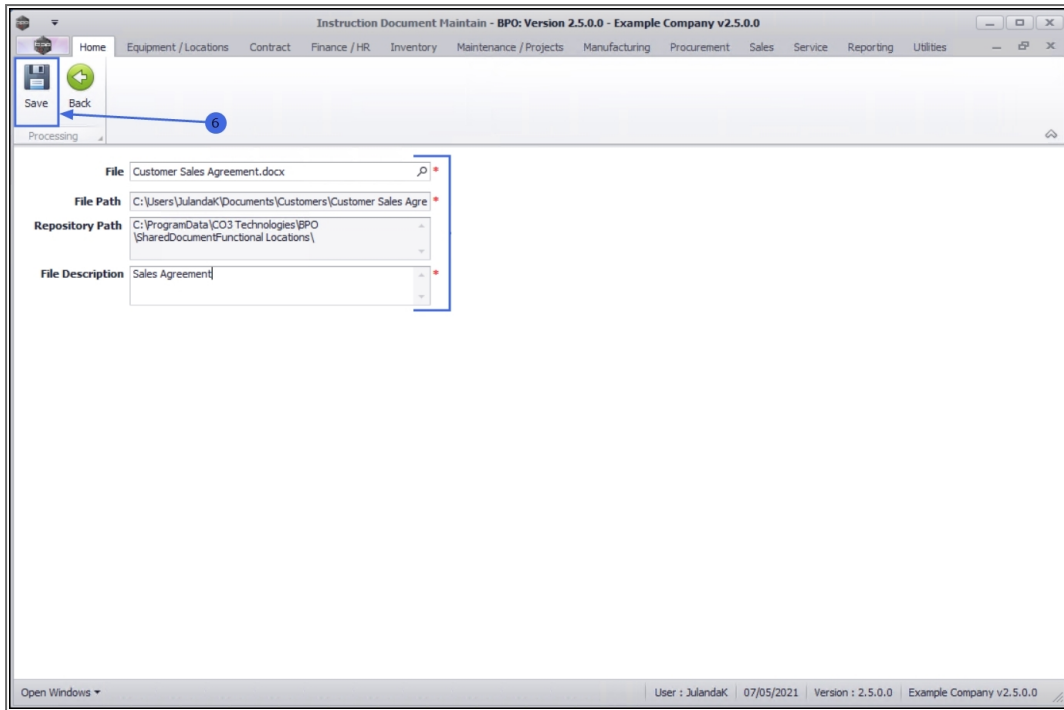


FILE LOCATION DETAILS

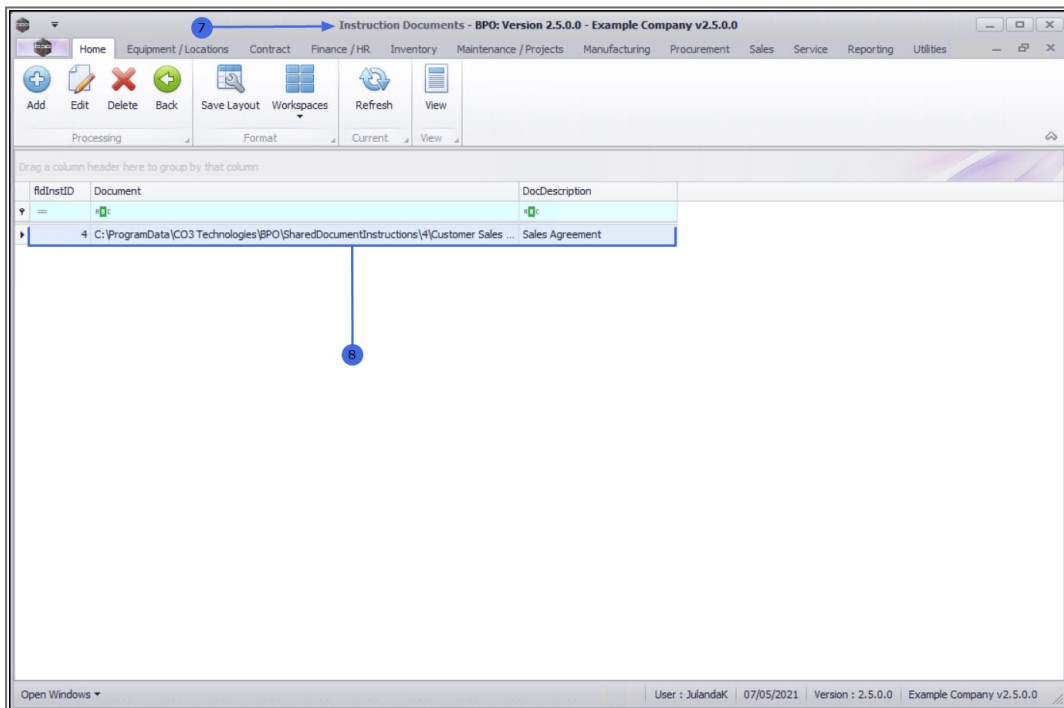
- **File:** This field is populated with the selected *file name*.
- **File Path:** This field is populated with the selected *file path*.
- **Repository Path:** This field will populate with to the repository path set up in the Configurator.
- **File Description:** Click in the text box and type in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



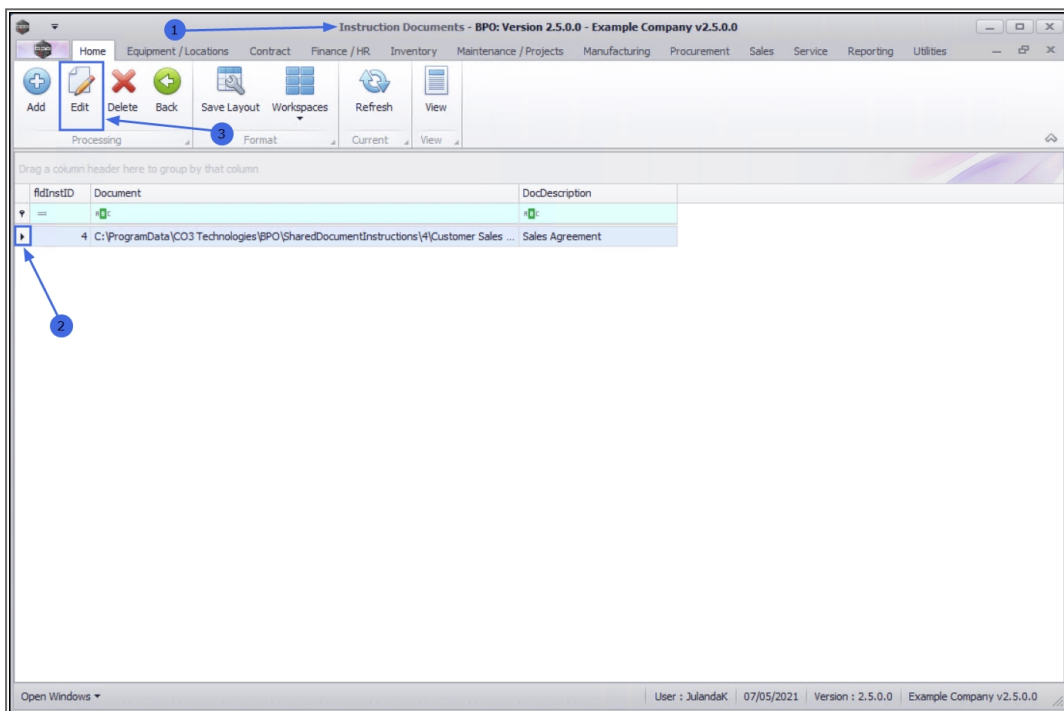
EDIT A LINKED DOCUMENT

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.

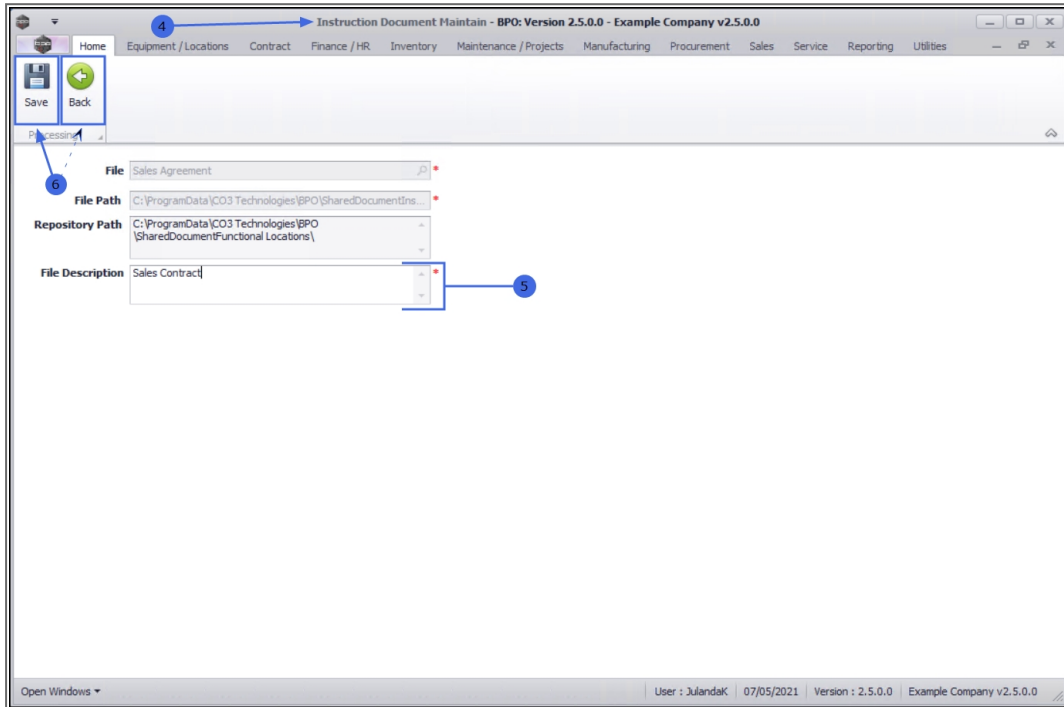


Note that the fields for *File*, *File Path* and *Repository Path* have been greyed out indicating that they cannot be changed.

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

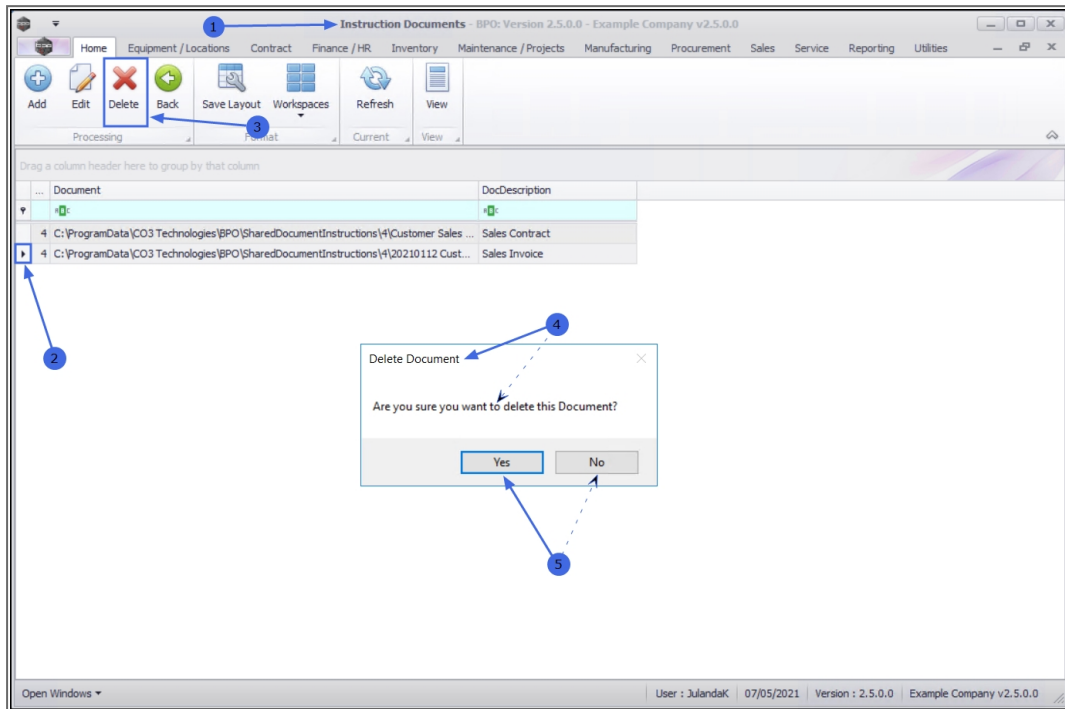
1. From the *Instruction Documents* listing screen,
2. Click in the **row** of the document you wish to delete from the instruction.
3. Click on **Delete**.



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.



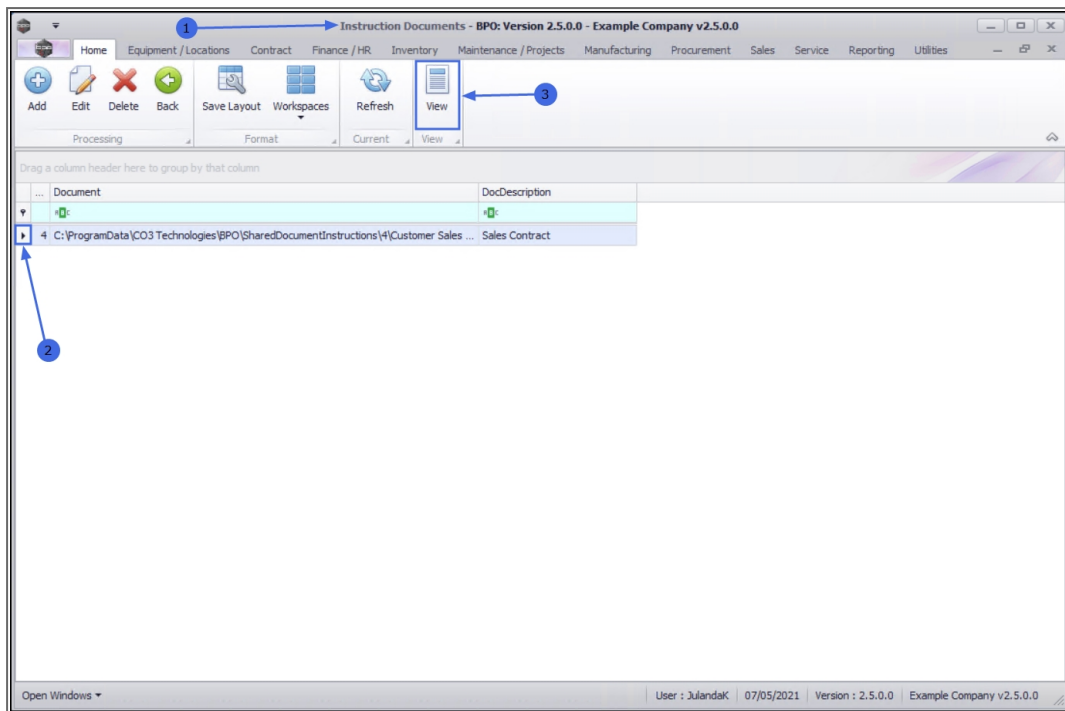
VIEW A LINKED DOCUMENT

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

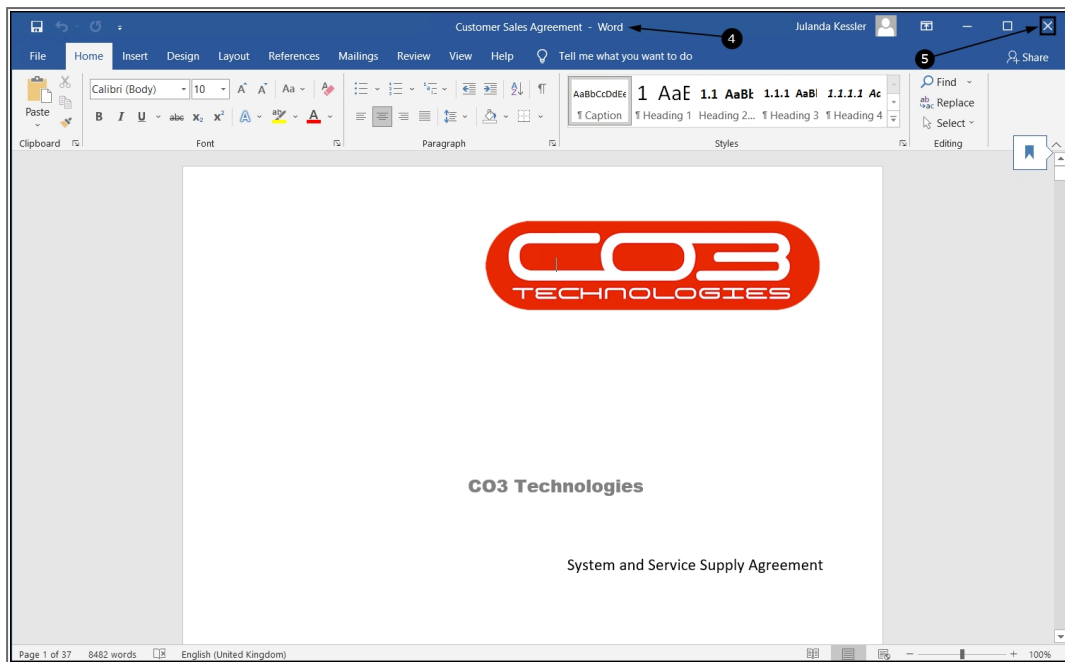
1. From the **Instruction Documents** listing screen.
2. Click in the **row** of the document you wish to view.
3. Click on **View**.



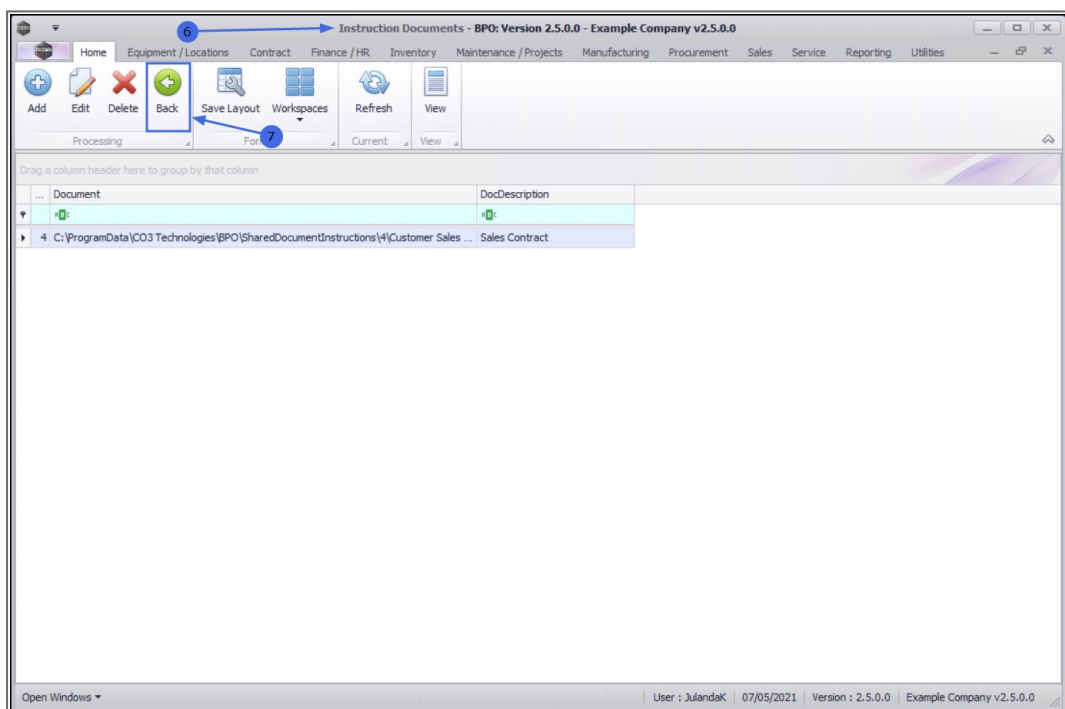
Short cut key: **Right click** to display the **All groups** menu list. Click on **View**.



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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