

SERVICE

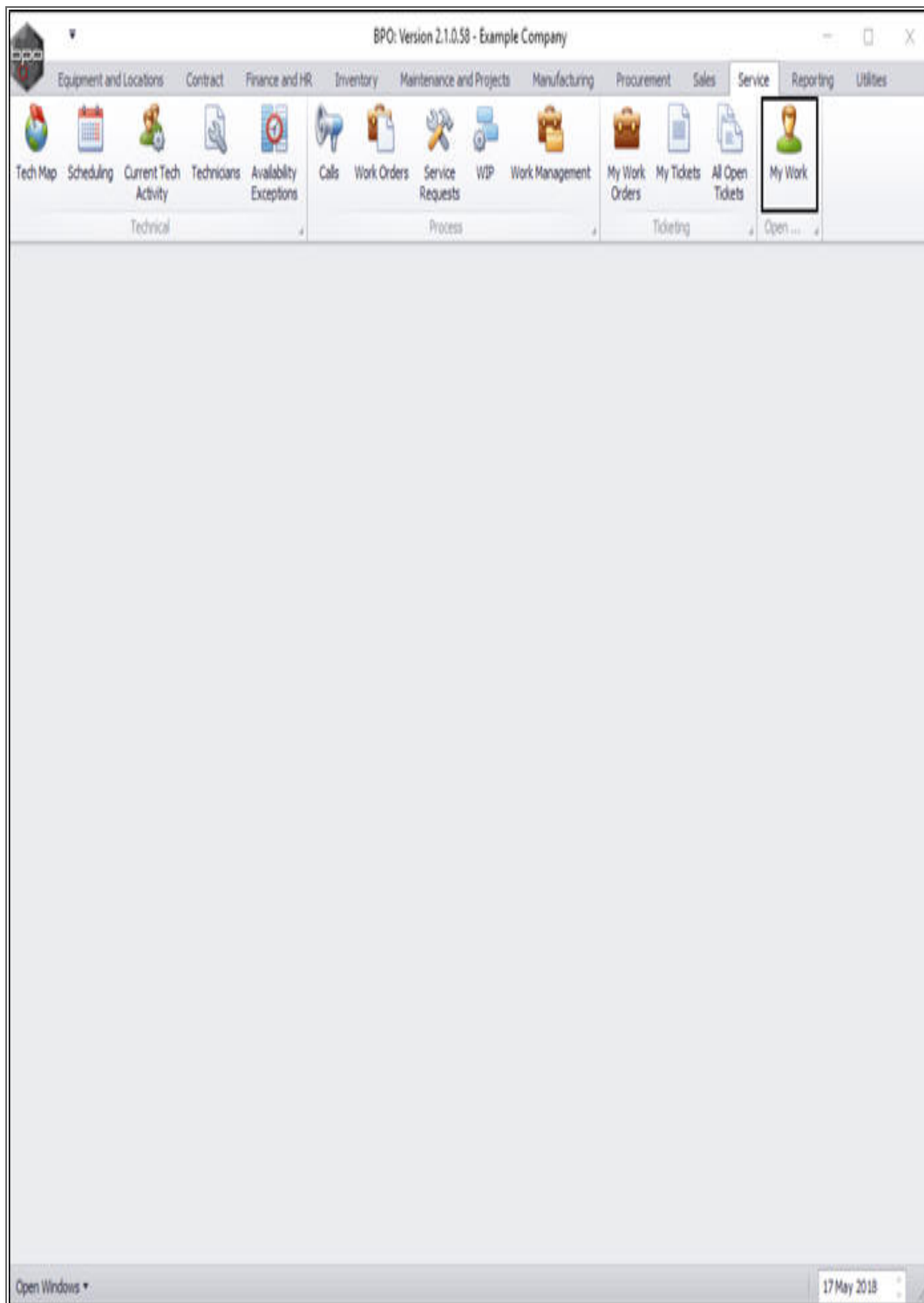
MY WORK – VIEW, ADD, OPEN (DIGITAL) DOCUMENTS

Digital documents (e.g. documents scanned to PDF) can be linked in various places on BPO.

These documents should be saved in a shared folder on the **server** to enable all users with the relevant security rights to view the documents. If saved and linked from the workstation, another workstation cannot view the document.

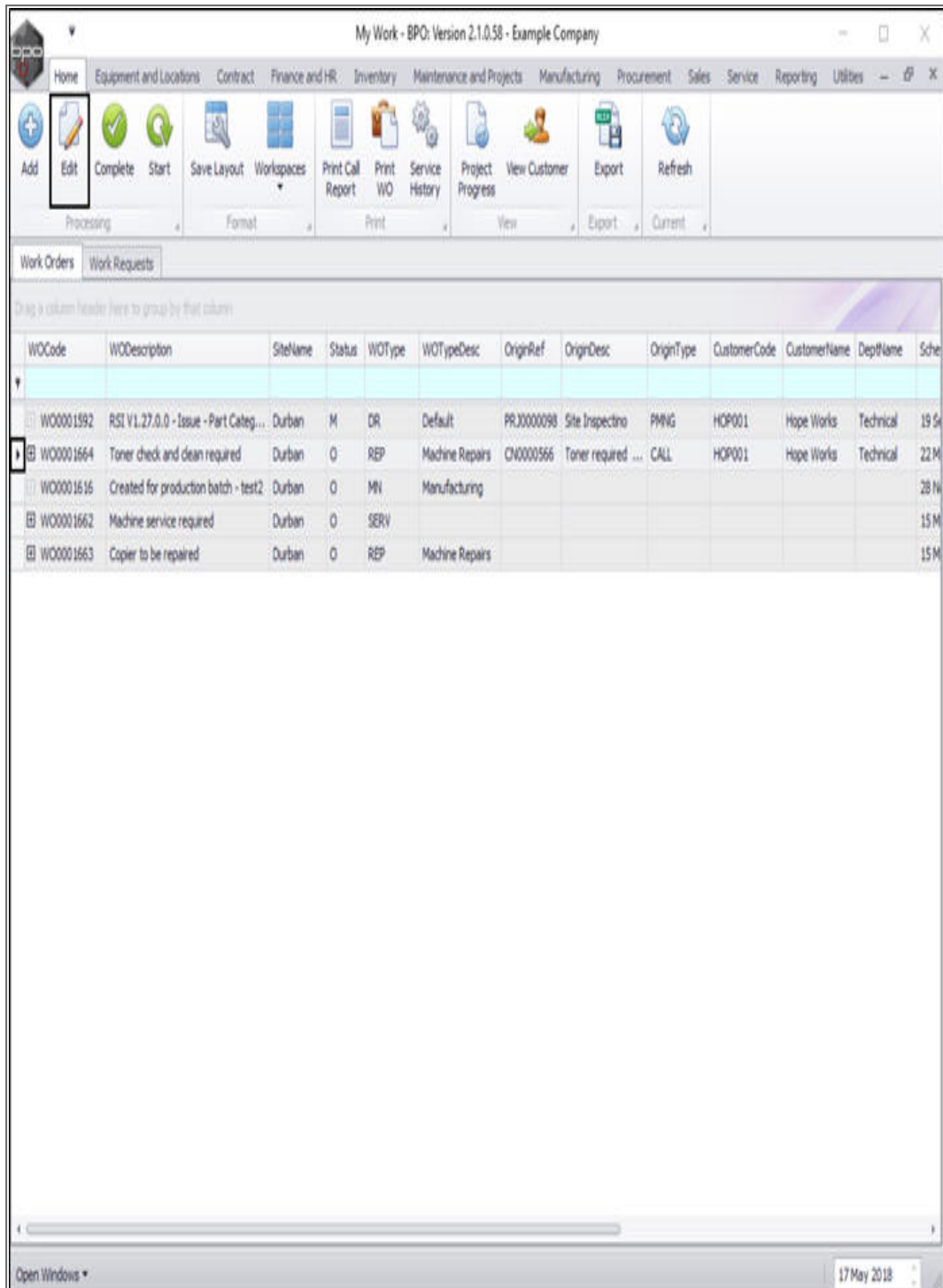
This process will show you how to link these documents to the work order via the **My Work** screen.

Ribbon Access: Service > My Work



The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to **view** the linked **digital documents** of.
- Click on **Edit**.



My Work - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

WOCode	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	Sche
WO0001392	RSI V1.27.0.0 - Issue - Part Categ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technical	19 54
WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	CH0000566	Toner required ...	CALL	HOP001	Hope Works	Technical	22 M
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing							28 M
WO0001662	Machine service required	Durban	O	SERV								15 M
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15 M

Open Windows 17 May 2018

VIEW LINKED DOCUMENTS

The *Maintain WO - Ref []* screen will be displayed.

- Click on the *Documents* tile.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Swap Out

Meters

Expenses

Travel 1

Documents

Warranties Issued

Instructions

Images

Meters

Open Windows

17 May 2018

Description: Toner check and clean required

Requestor: Abigal Mine

WO Type: Repair

Priority: 2

Request Date: 18 May 2018 09:42:59

Status: Open

Billable: ☐

Capitalise: ☐

Work Order Item

Functional Location: Equipment

Item: 2020-103053

Comment: Check Colour Toner - not printing effectively

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CH0000566
PMNG	Project Reference	

Schedule:

Assigned To: Abigal Mine

Assigned By: Abigal Mine

Scheduled Start: 22 May 2018 00:00:00

Scheduled End: 22 May 2018 02:00:00

Actual Start: 17 Jun 2018 00:00:00

Actual End: 17 Jun 2018 00:00:00

Delay Comments: Currently on Schedule

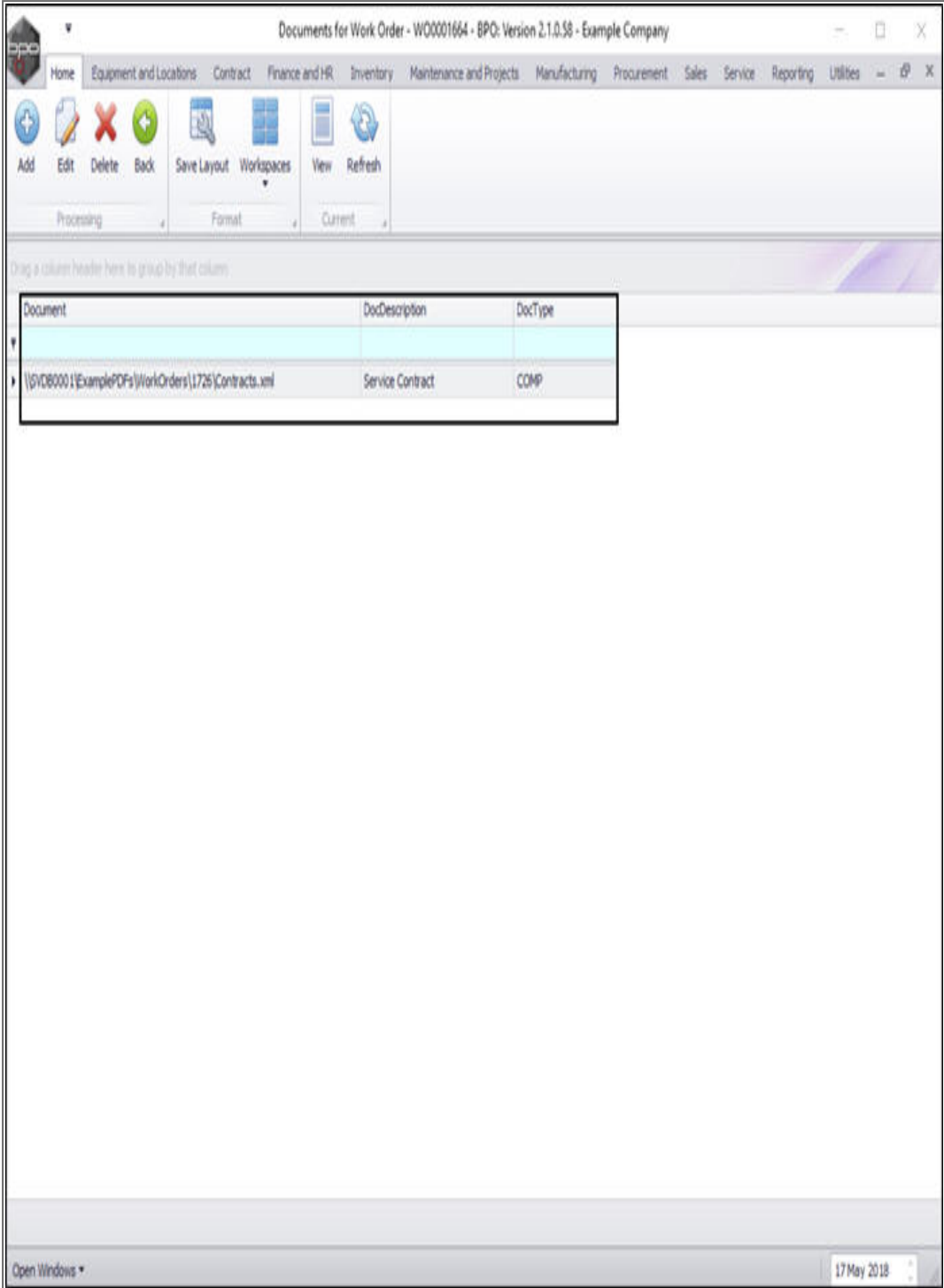
Rectification Code:

Rectification Comments:

Completion Date: 17 Jun 2018 00:00:00

The **Documents for WO - []** screen will be displayed.

- Here you can view a **list** of all the **digital documents** linked to this work order.



Documents for Work Order - WO0001664 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces View Refresh

Processing Format Current

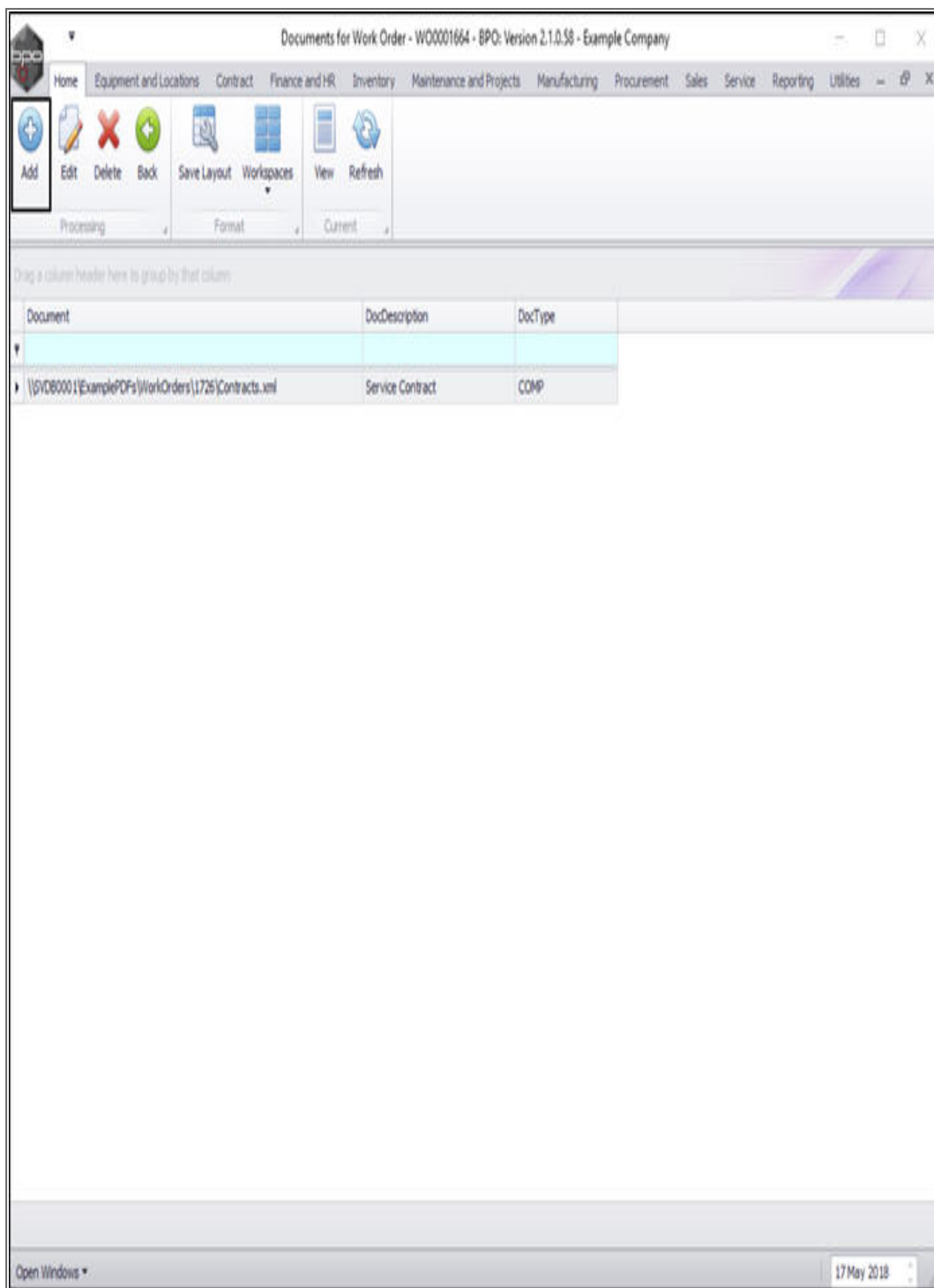
Drag a column header here to group by that column

Document	DocDescription	DocType
\\SYD80001\ExamplePDFs\WorkOrders\1726\Contracts.xml	Service Contract	COMP

Open Windows 17 May 2018

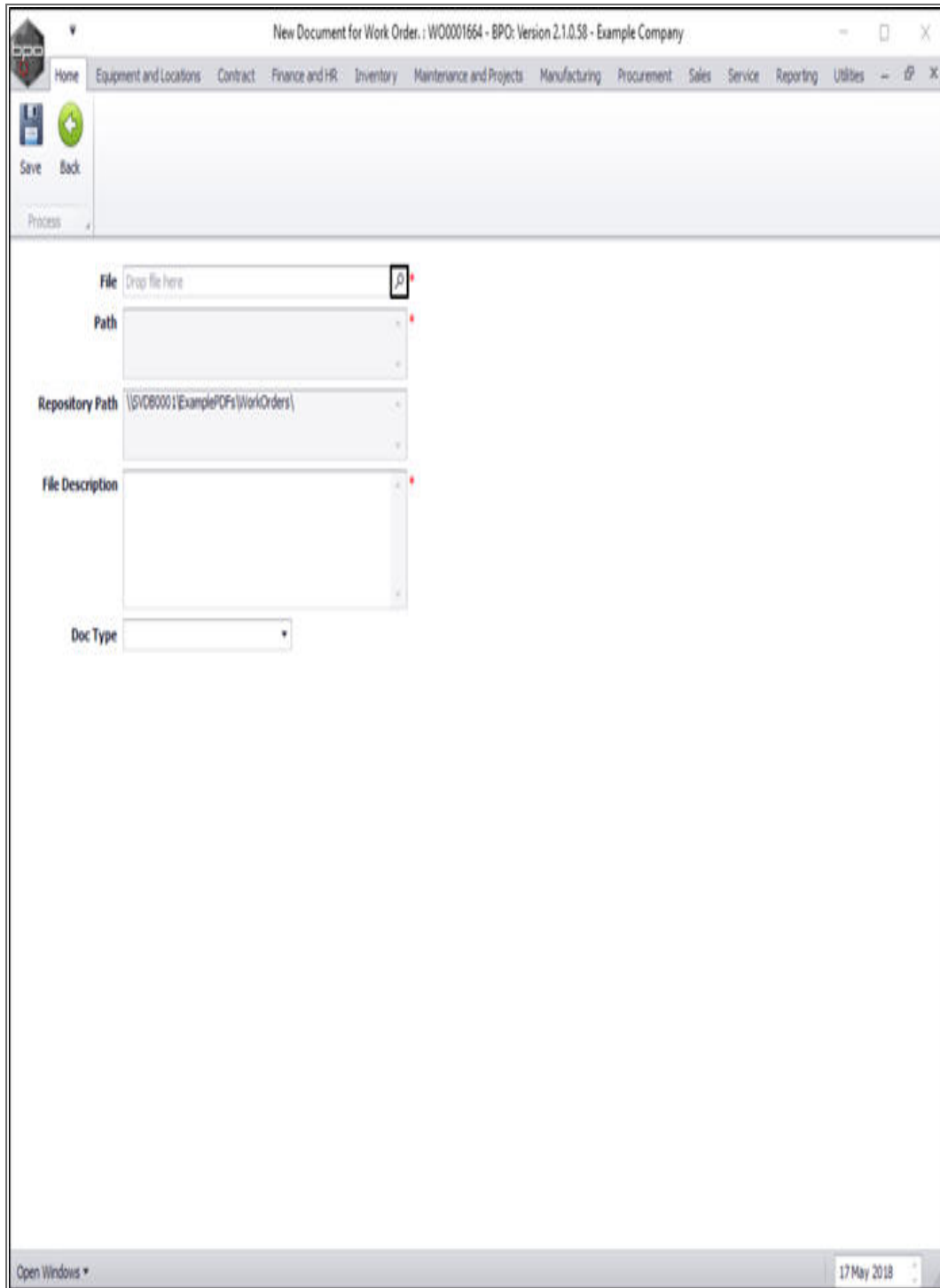
ADD A NEW DOCUMENT

- In the *Documents for Work Order - []* listing screen, click on *Add*.



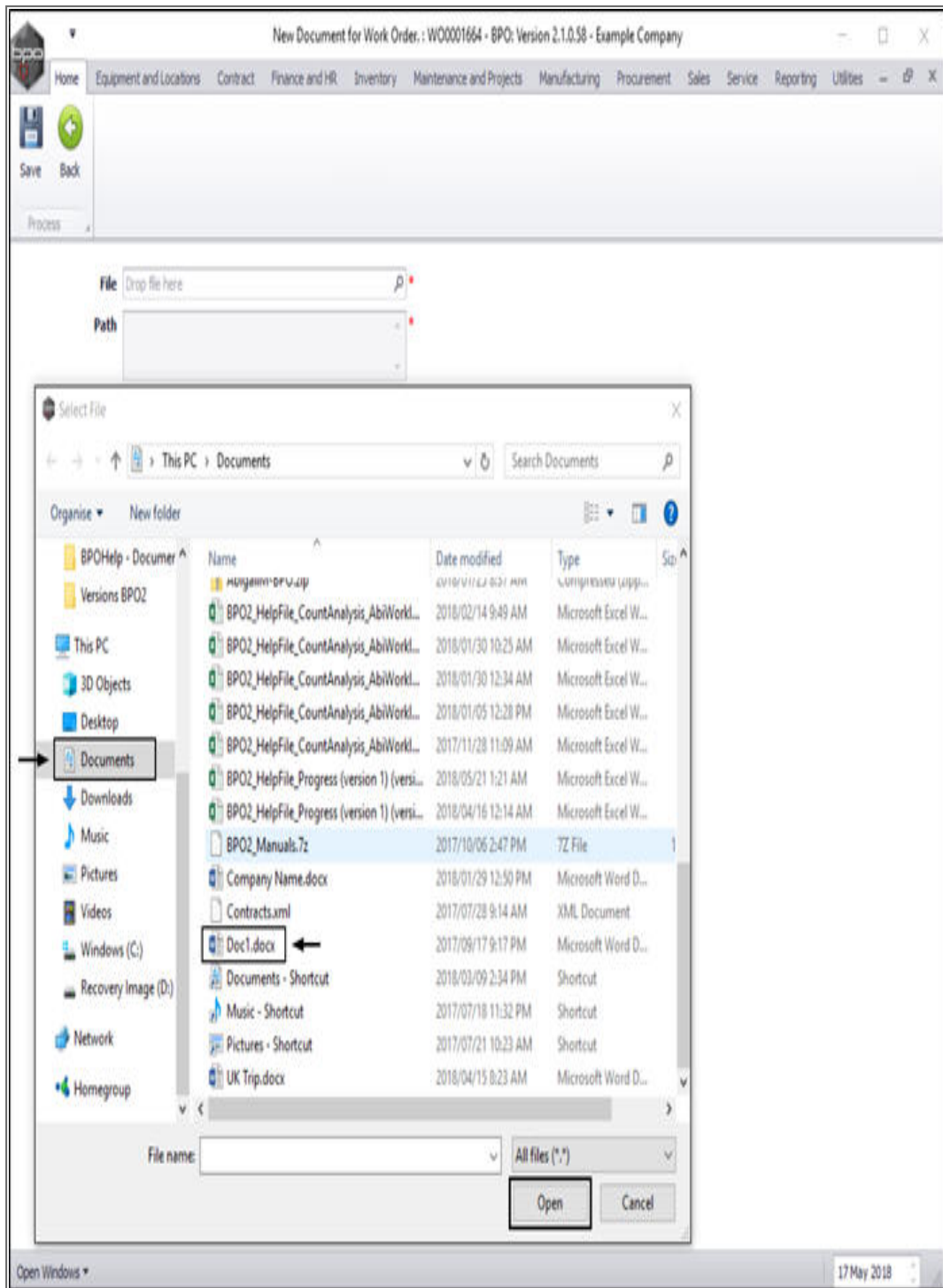
The ***New Document for Work Order: []*** screen will be displayed.

- You will note that the Repository Path is auto populated according to the path that has been set up in the **company configuration**.
- Click on the **search** button in the **File** field to find the document in the **shared location** on the server.

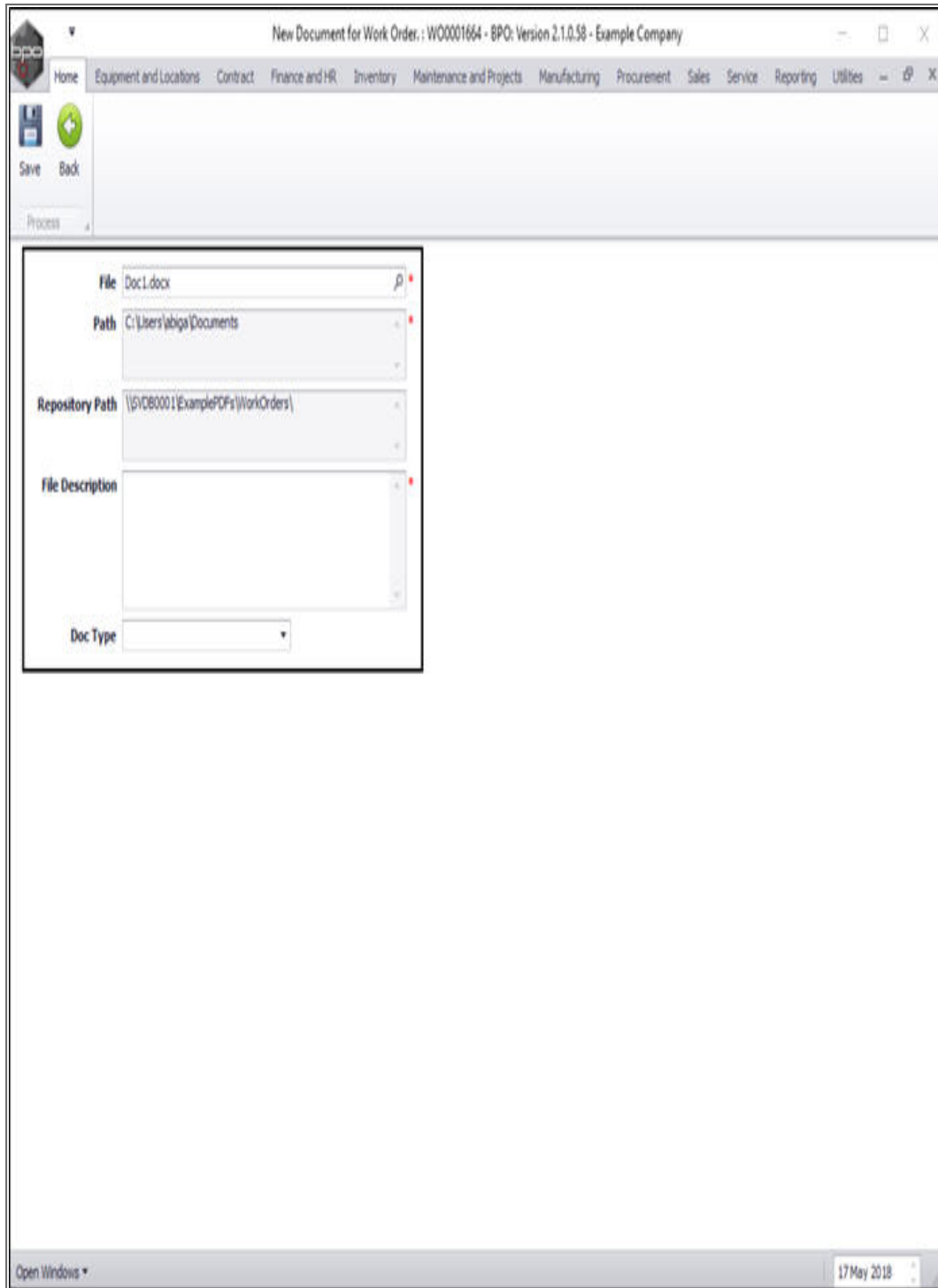


- The **Select File** screen will pop up.
- Select the relevant document to attach to this work order.

- Click on **Open**.



- **File:** This will now auto populate with the selected document file name.
- **Path:** This will now auto populate with the selected document file path name.
- **Repository Path:** This is auto populated according to the path that has been set up in the **company configuration**.
- **File Description** Click in this text box and type in a description for this attached document.
- **Doc Type:** Click on the drop-down arrow and select from the menu the document type.



New Document for Work Order : WO0001664 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

File Doc1.docx

Path C:\Users\abiga\Documents

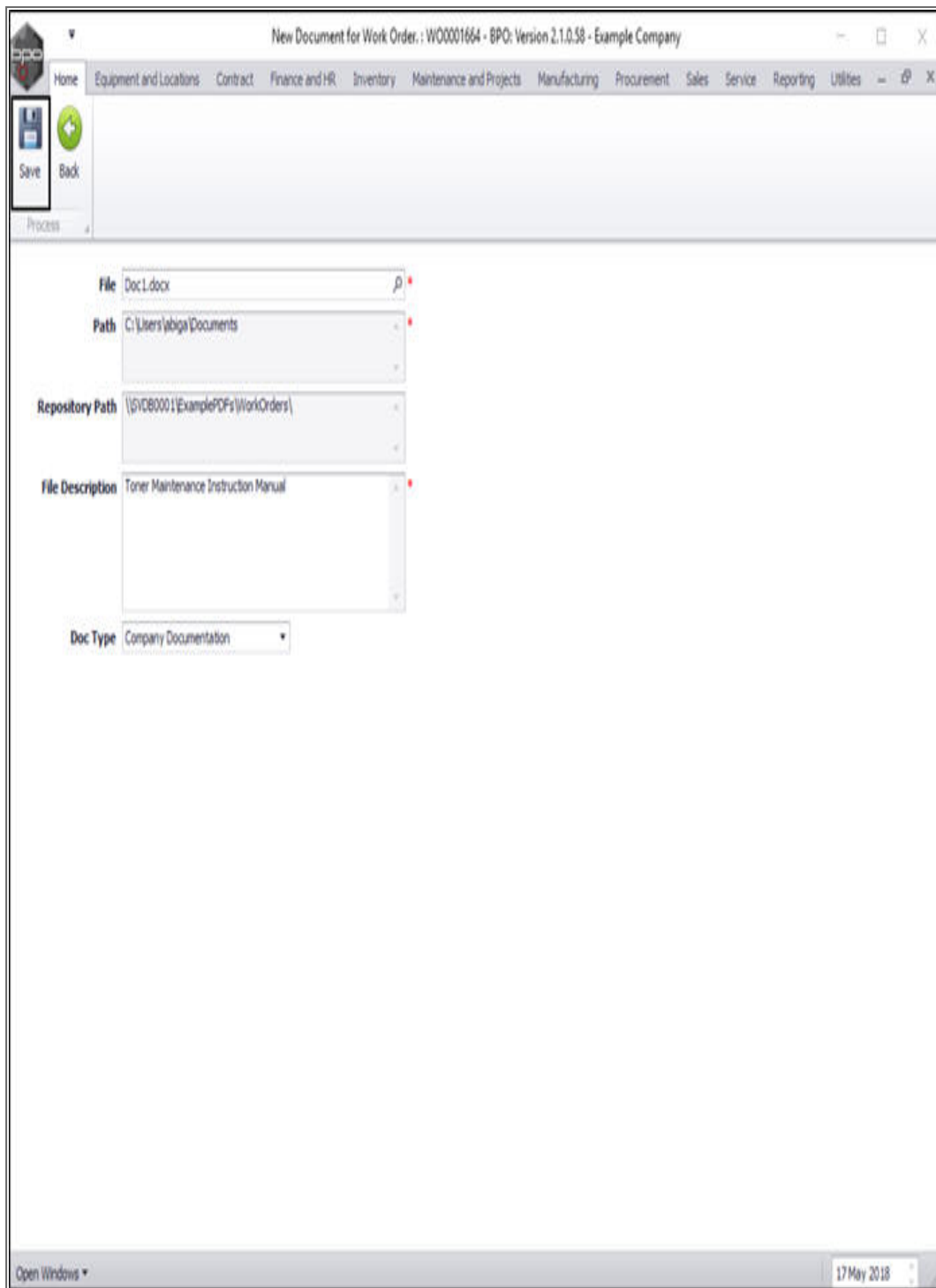
Repository Path \\SYDB0001\ExamplePDFs\WorkOrders

File Description

Doc Type

Open Windows 17 May 2018

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



New Document for Work Order : WO0001664 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

File Doc1.docx

Path C:\Users\ybiga\Documents

Repository Path \\SYDB0001\ExamplePDFs\WorkOrders

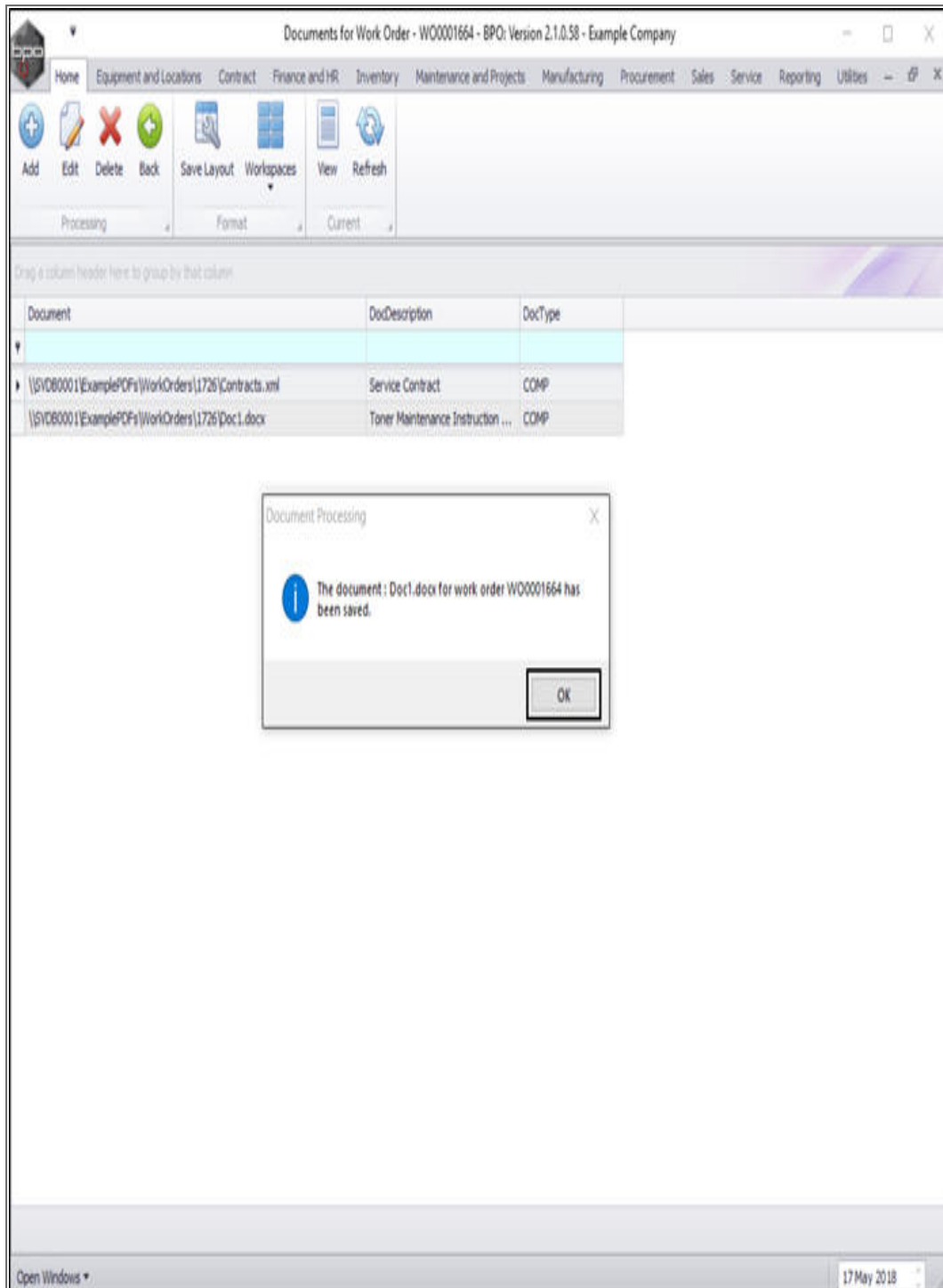
File Description Toner Maintenance Instruction Manual

Doc Type Company Documentation

Open Windows 17 May 2018

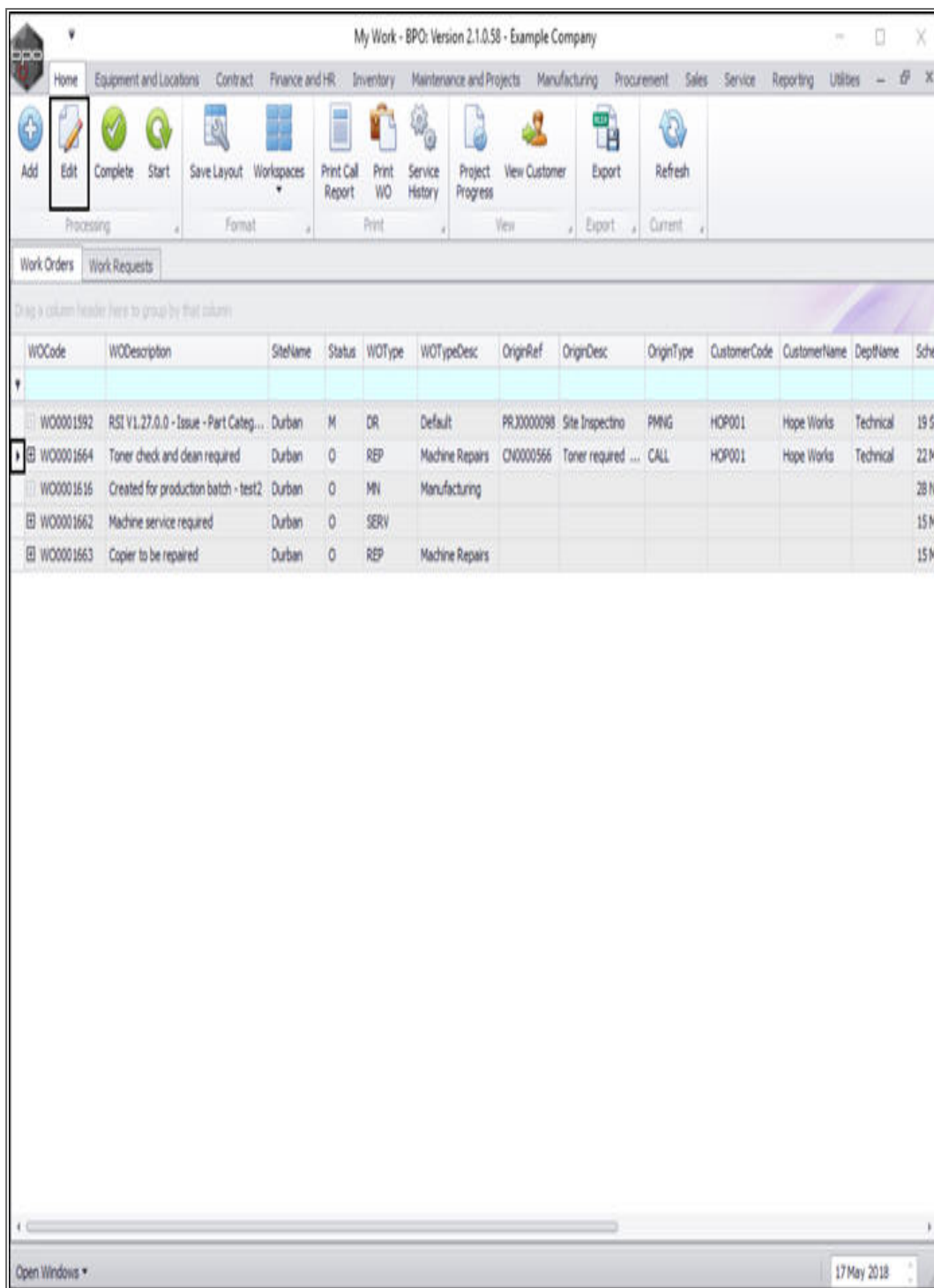
- A **Document Processing** message box will pop up informing you that;

- *The document: [] for work order [] has been saved.*
- Click on **OK**.



OPEN AND VIEW DOCUMENT CONTENTS

- Click on the ***row selector*** in front of the ***work order*** that you wish to ***open/view*** the linked documents of.
- Click on ***Edit***.



The **Maintain WO - Ref []** screen will be displayed.

- Click on the **Documents** tile.

Maintain WO - Ref WO0001664 - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Swap Out

Meters

Expenses

Travel 1

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Warranties Issued

Instructions

Images

Meters

Open Windows

17 May 2018

Description Toner check and clean required

Requestor Abigal Mline

WO Type Repair

Priority 2

Request Date 18 May 2018 09:42:59

Status Open

Billable

Capitalise

Work Order Item

Functional Location Equipment

Item 2020-103053

Comment Check Colour Toner - not printing effectively

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CH0000566
PMNG	Project Reference	

Schedule

Assigned To Abigal Mline

Assigned By Abigal Mline

Scheduled Start 22 May 2018 00:00:00

Scheduled End 22 May 2018 02:00:00

Actual Start 17 Jun 2018 00:00:00

Actual End 17 Jun 2018 00:00:00

Delay Comments Currently on Schedule

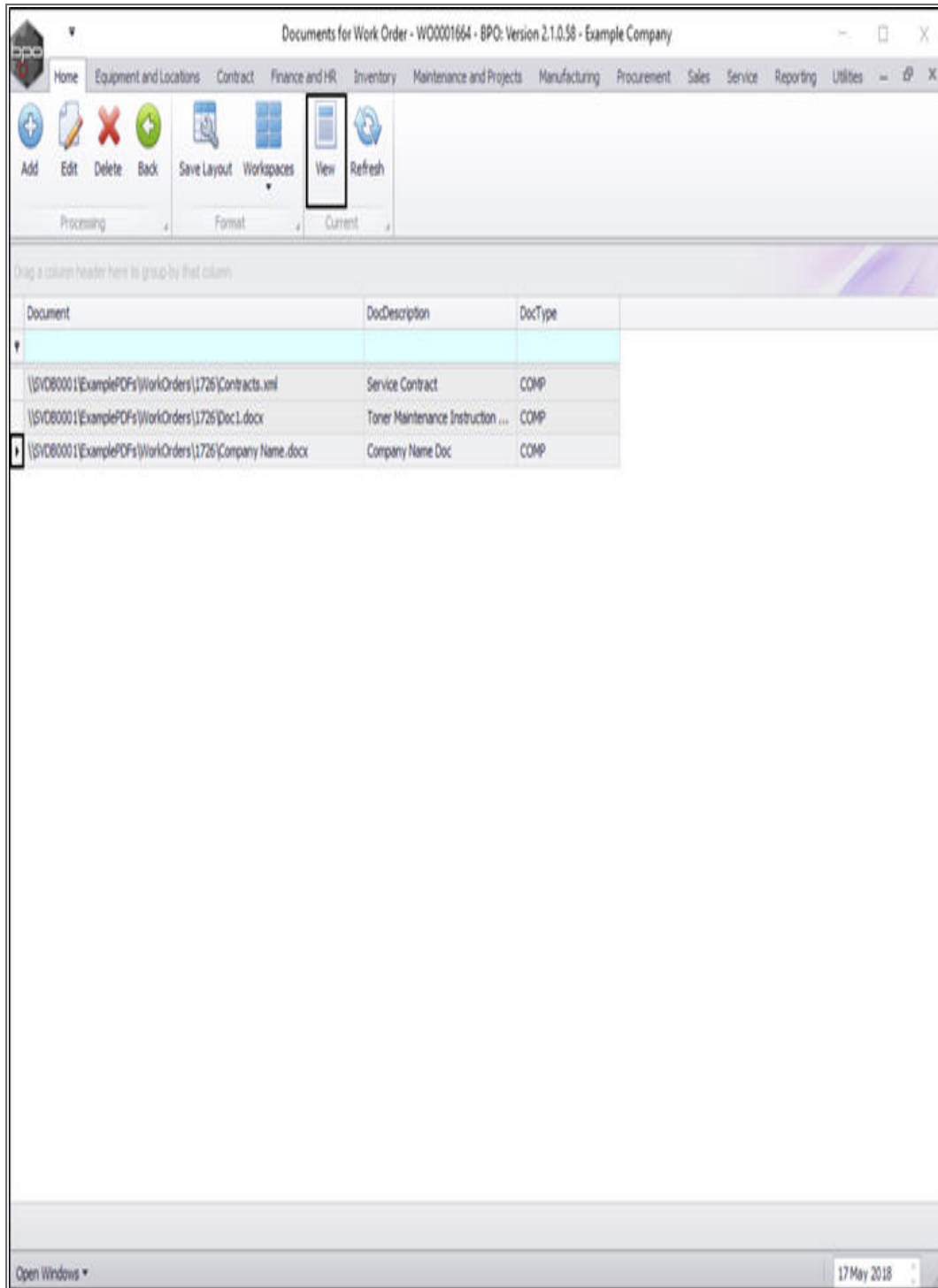
Rectification Code

Rectification Comments

Completion Date 17 Jun 2018 00:00:00

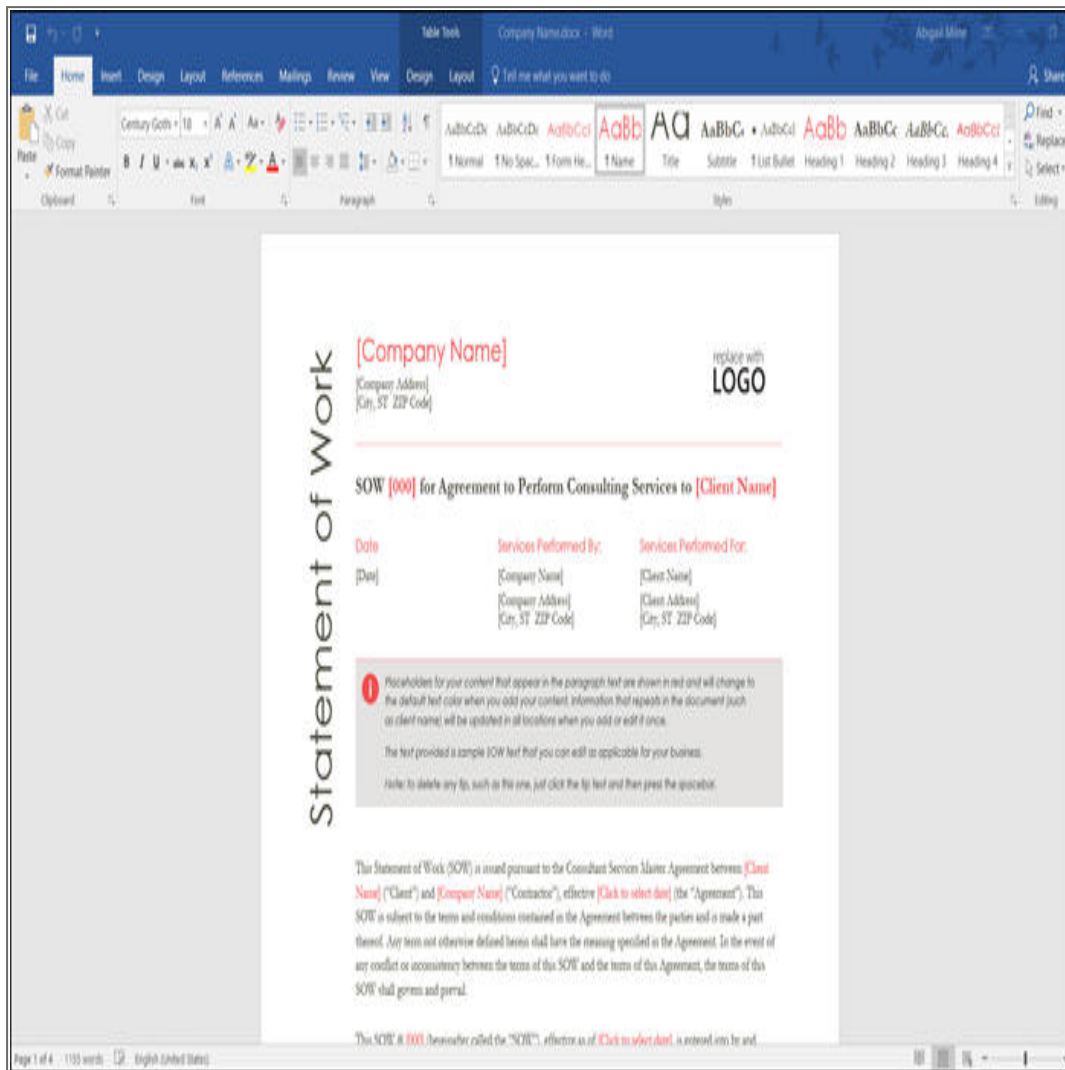
The **Documents for Work Order - []** screen will be displayed.

- Click on the **row selector** in front of the **document** you wish to **open/view** (ensure that you have selected the correct document by reviewing the information in the Document and Doc Description fields).
- Click on **View**.



- The document will open within the relevant program, e.g. a **Word** document will open in **Word**, a **PDF** file will open in **Adobe**

Reader.



MNU.073.009

