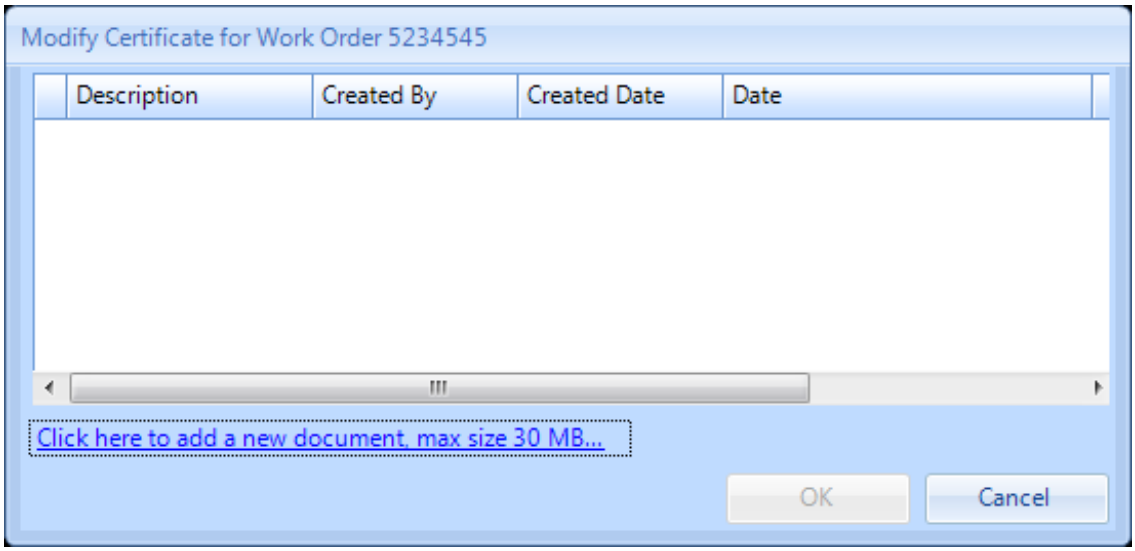
Add/View/Delete Certificates

Wed, Jan 17, 2024 Agent Actions - Reactive, Quote, PPM, Audit

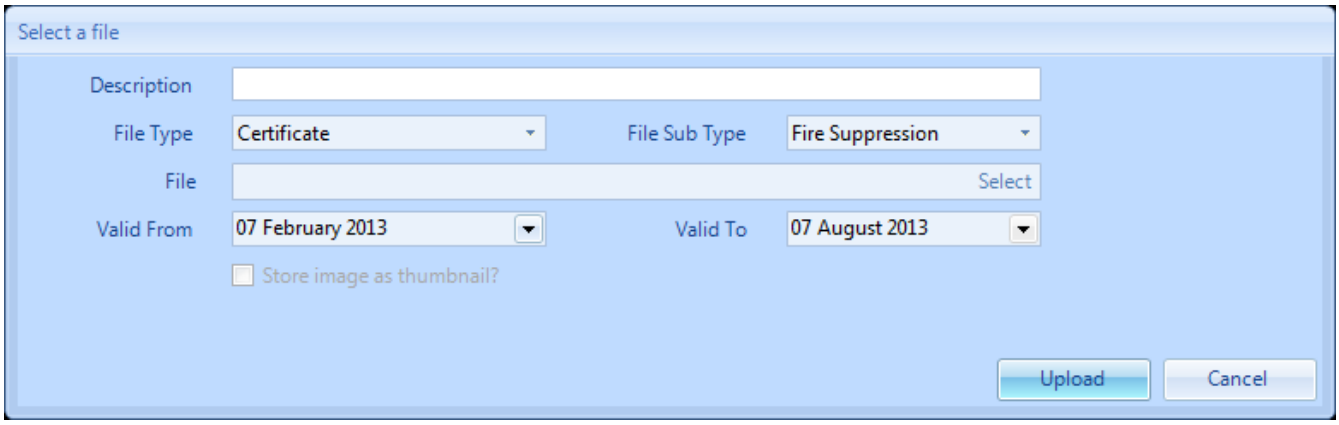
1. From the Agent Action button, choose "Add/View/Delete Certificates".

2. This screen will appear.



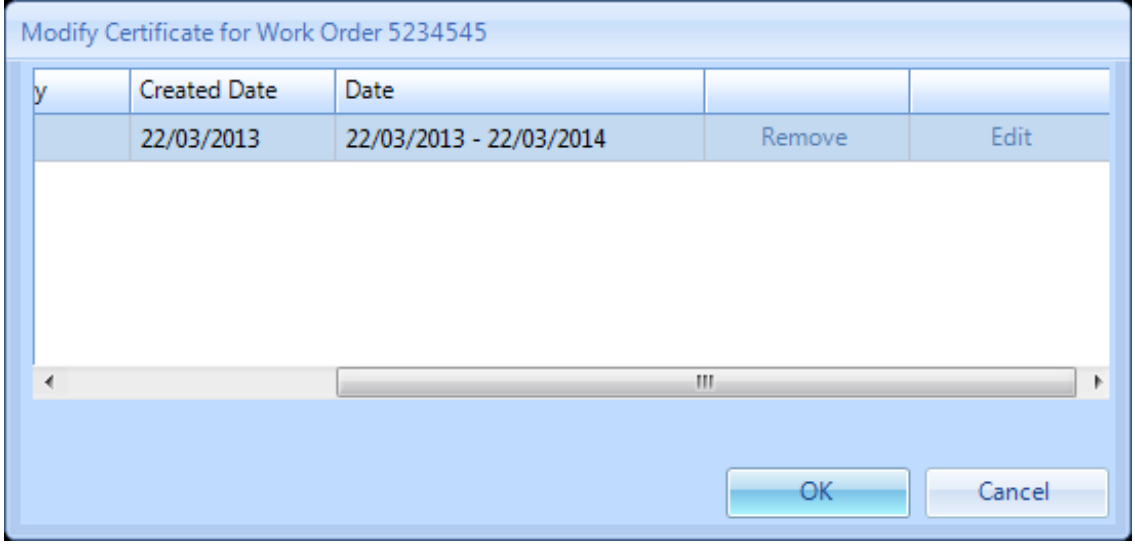
3. Click

Click here to add a new document, max size 30 MB... and this window will then open.



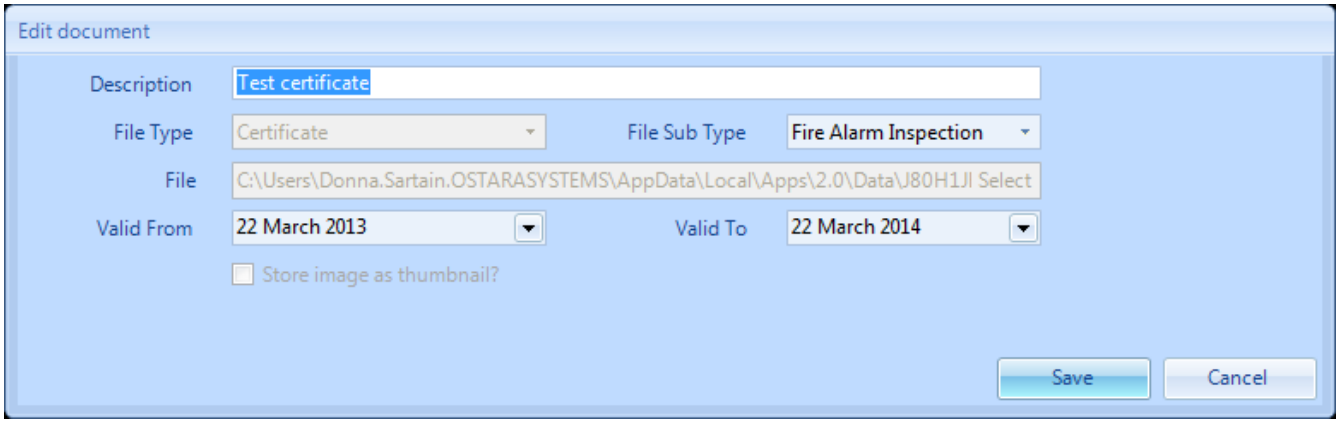
4. Fill in all relevant details. Select a file by clicking on the "Select" button.

5. Once the correct file has been chosen, click on the "Upload" button. This will bring you back to the previous screen.



6. From here you are able to remove/edit the file. To remove this file click on the remove button.
Note: If the Remove and Edit buttons are not visible just use the scroll bar at the bottom until they become visible.

7. To edit the file click on the edit button, this screen will open:



8. From here you can amend the Description the File Sub Type and the Valid From and To Dates. Click Save to save any amendments.

9. Clicking on the "OK" button will record an Event on the Work Order.

Note: On Certificate Upload against a PPM Work Order, future PPM Visit Dates are updated on the Contract based on Certificate expiry to ensure compliance is maintained. This will change the visit start date to 30 days prior to the certificate expiry.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=280

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