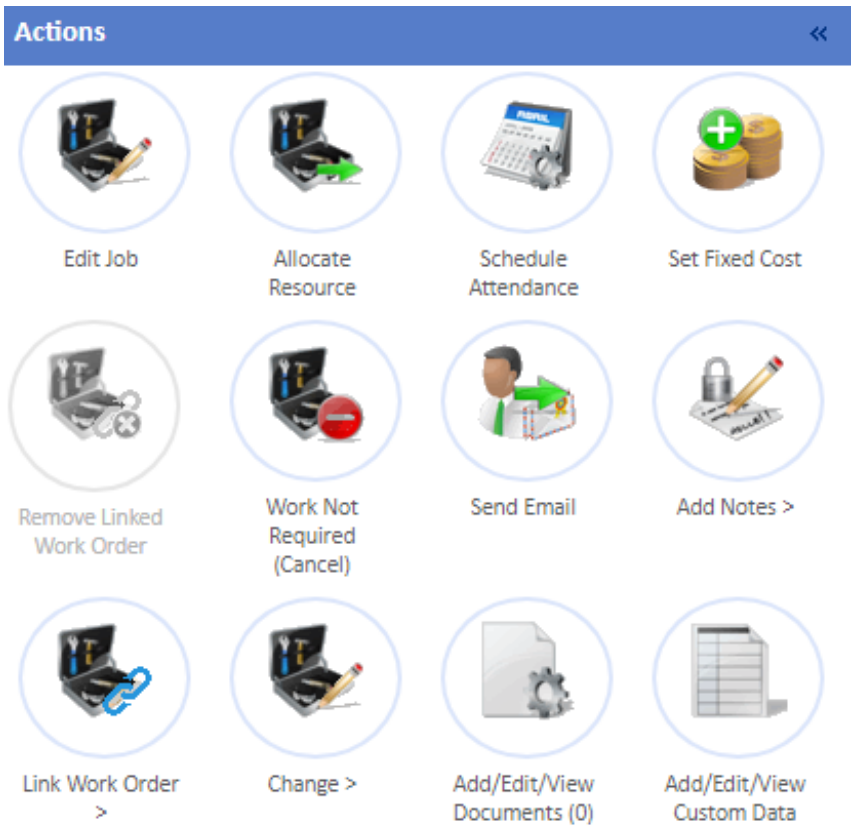
Add/Edit/View Documents

Fri, Jan 19, 2024 Job Detail Actions

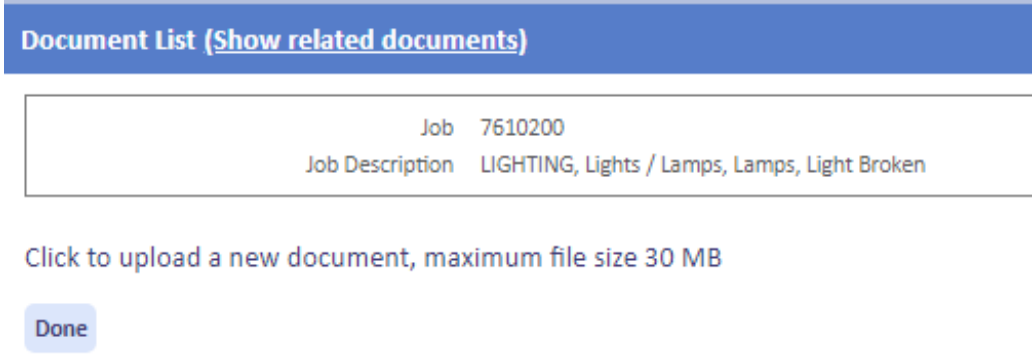
In some cases, Users may have documents/images that relate to a job in which they need to add to a job so that other Users can access them. This can be done using the "Add/Edit/View Documents" button.

1. On the Job Detail screen, select the "Add/Edit/View Documents" button to display the Documents List screen.



Note: The functionality of this button depends on the permission of the User. If they only have the View Documents permission, this button will only be selectable if there are already documents uploaded to the job. If no documents exist, then this button will be greyed. If the Add permission is present then this button will work as the below steps state.

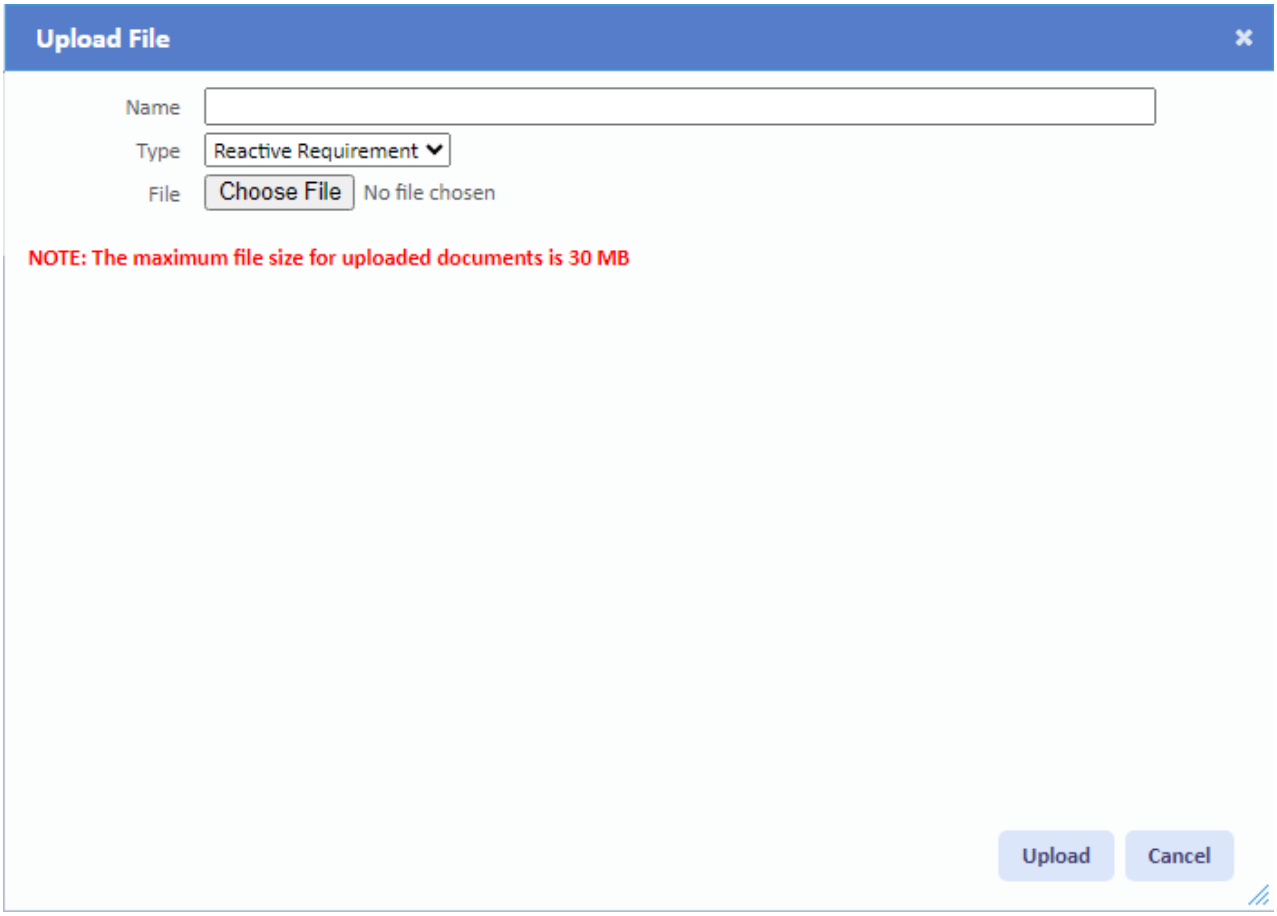
2. This screen will display all documents that relate/have been uploaded to the job (excluding certificates), if there are any as well as the Job number and Description. Click the "Click to upload a new document, maximum file size 30 MB" button to upload a document.



Note: The "Show related documents" button displays all uploaded documents that relate to the job such as Building documents and Certificates. Once the button is clicked, it is replaced with the "Hide related documents" button which, when clicked, hides all the related documents and leaves the documents directly uploaded to the job.

3. Once the "Upload File" pop up is shown, give a description of the document being uploaded. Also, provide the "Type" of the document. The "Type" determines what the document is and selecting different types will display different fields to fill in. For example, as shown below a "Reactive Requirement" document only requires a description. Selecting "Risk Assessment" will require "Valid From" and "Valid To" dates where as selecting an "Image" requires the User to determine whether the Image is "Pre" or "Post" the fault and when it was taken.

Once the above has been filled in, select the file to upload by clicking the "Browse" button and locating the file.



Once the document details have been entered and the document selected, click "Upload" to upload the document.

4. After the document is uploaded. the Document List is updated with the new document. When a document has been uploaded, the folder structure will appear on the left. This separates all files by their types to allow for easy navigation to find the relevant file.

Click "Done" to return.

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