

# Attaching Related Documents to Projects

## ADD FILE TO REPOSITORY

Path: Module>System Administration>Document Administrator

1. Click the NEW Icon
2. Edit the ID to match the project number (no hyphens). If the ID already exists, add a number at the end (1,2,3...)
3. Enter the actual Project Number and file description in the Description
4. Choose View:Select>Roles

Module System Administration Setup QUICKLINKS

**Document Administrator** View: Select Select Roles

Id	0701006	Editor	RCROSS	View	Click to view
		Edit Date	Jul 19, 2007	System Name	
Description	07-01006 RFE			Title	
				Lock Status	Available
				File Type	
				File Size	

Load file  Browse...

5. Click on the green Plus sign to add Roles that will have permission to view this document

Module System Administration Setup QUICKLINKS

**Role**

Id	701006	Editor	RCROSS
		Edit Date	Jul 19, 2007
Description	07-01006 RFE		

**Role** Add / Res

Role	Description
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6. Place a checkmark next to all Roles that will have permission to view this document. Click the DONE Icon twice to return to the Document Administrator screen.

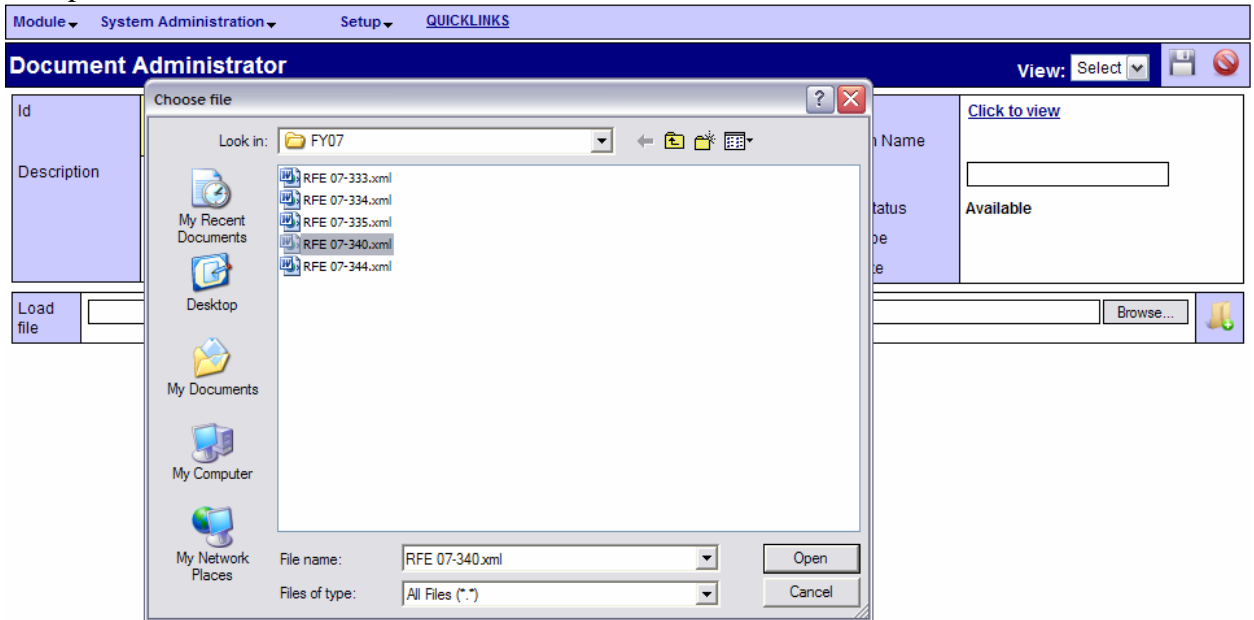
Module System Administration Setup QUICKLINKS

**Roles**

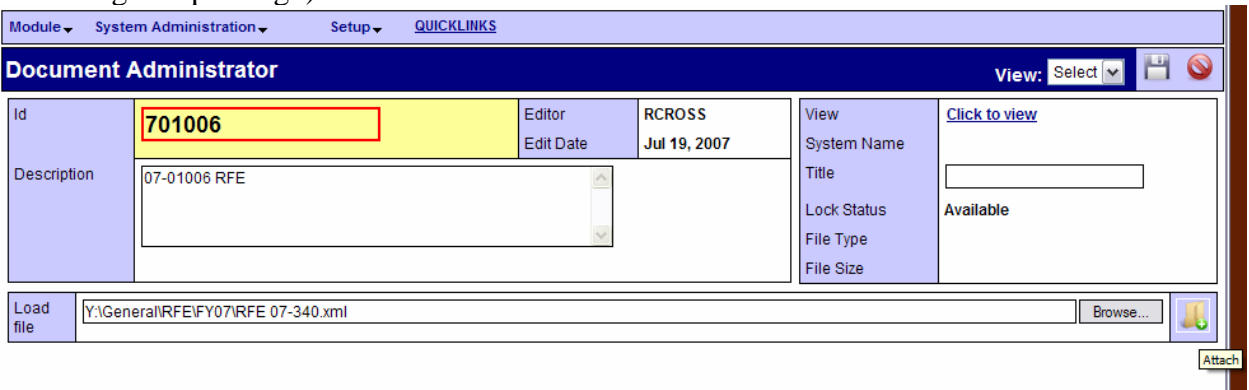
<input checked="" type="checkbox"/>	BILLING_COORDINATOR	BILLING FUNCTIONS: MANAGE ACCOUNTS, GENERATE BILLS, PERFORMS RAPID STATUS CHANGES
<input checked="" type="checkbox"/>	BUSINESS_MANAGER	EDIT WORK ORDERS, PERFORM TIME CARD APPROVAL AND ADJUSTMENTS, EDIT PURCHASE ORDERS, APPROVE EXTERNAL CHARGES, MANAGE PROJECT GROUPS, EDIT PROJECTS
<input checked="" type="checkbox"/>	ENGINEER	VIEW PROJECTS, WORK ORDERS, PURCHASE ORDERS, EXTERNAL CHARGES. CREATE CUSTOMER REQUEST
<input checked="" type="checkbox"/>	HR_MANAGER	VIEW WORK ORDERS, PROJECT, AND TIMECARDS. MANAGE SHOPS & EMPLOYEES
<input checked="" type="checkbox"/>	SHOP_MANAGER	EDIT WORK ORDERS, PERFORM RAPID STATUS CHANGE. CREATE MATERIAL REQUESTS & CUSTOMER REQUESTS. VIEW INVENTORY, PURCHASING INFO, PROJECTS, & PROPERTY. CREATE EXTERNAL CHARGES.
<input checked="" type="checkbox"/>	PROJECT_MANAGER	EDIT PROJECTS. VIEW WORK ORDERS, PURCHASE ORDERS, EXTERNAL CHARGES. CREATE CUSTOMER REQUEST.
<input checked="" type="checkbox"/>	SERVICE_DESK_MANAGER	EDIT WORK ORDERS. ADJUST & APPROVE TIMECARDS. APPROVE EXTERNAL CHARGES. VIEW EQUIPMENT, PROJECTS, PROPERTY. APPROVE CUSTOMER REQUESTS.
<input checked="" type="checkbox"/>	STORES_MANAGER	VIEW WORK ORDERS, PROJECTS, EQUIPMENT. MANAGE INVENTORY. CREATE PURCHASE ORDERS. MANAGE VENDOR CATALOG
<input checked="" type="checkbox"/>	STORES_ISSUER	EDIT MATERIAL REQUESTS, CREATE COUNTER RELEASE/RETURNS. VIEW WORK ORDER, PURCHASE ORDERS, PROJECTS
<input checked="" type="checkbox"/>	STORES_RECEIVING	CREATE RECEIVE & DISBURSEMENT RECORDS. VIEW WORK ORDERS, INVENTORY, PROJECTS
<input checked="" type="checkbox"/>	FMAX_ADMIN	FMAX ADMINISTRATION
<input checked="" type="checkbox"/>	SCHEDULER	MANAGES WORK ORDERS AND PROJECTS

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- Click on the Browse... button to find the file you wish to load. Select the file and click on Open



- The path to the file will be displayed in Load File. Click on the ATTACH Icon (folder with the green plus sign) and then click the SAVE Icon.



## LINK FILE TO PROJECT

Path: Module>Project Management>Project

1. Search for the Project to which the file will link
2. Click the EDIT Icon
3. Choose View:Select>Related Documents

Work Order	Description	Status	Budget
<input type="checkbox"/> 001573	ENGINEERING:UPGRADE AIR CONDITIONING	OPEN	\$0.00
<input type="checkbox"/> 001574	EQUIPMENT:UPGRADE AIR CONDITIONING	OPEN	\$0.00

4. Click the green plus sign to add a new document link

Launch	Document	Title	Name	Edit Date	File Type	File Size
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5. Scroll to the page containing the document ID or use the Search functionality. Recently added documents will be on the last pages. Click on the Document ID

Id	Description	File Type	File Size	Editor	Edit Date
<a href="#">701003</a>	07-01003	xml	138047	RCROSS	Jul 19, 2007
<a href="#">701004</a>	07-01004	xml	154577	RCROSS	Jul 19, 2007
<a href="#">701005</a>	07-01005	xml	198120	RCROSS	Jul 19, 2007
<a href="#">701006</a>	07-01006 RFE	xml	141109	RCROSS	Jul 19, 2007

6. Click the DONE Icon to return to the Project screen
7. Click the SAVE Icon to save the changes