Job Documents

Last Modified on 01/11/2023 2:24 pm EST

Existing Documents and Scanned Documents may be attached to a Job record. When documents are attached to a Job, they are stored in the Job documents folder on the Customer Explorer.

This article contains instructions on:

- Adding an existing document
- Scanning in a document
- Editing the properties of a document
- Deleting a document

Add an Existing Document

To add a document to a job, follow the instructions below.

1. Open the Job record where a document will be attached. Once the Job record is open, select the Tools toolbar, then select the Documents button on the Tools toolbar. Position your mouse in the white area to the right, right-click and select the Add Existing Document option.

2. The Document Add form will be displayed. A User may add one or multiple documents at one time. In the header section of the Document Add form, enter a Description for the document. Select the appropriate Security Level from the drop-down list. Select the appropriate Document Type from the drop-down list.

3. Once the header information has been filled in, navigate to the grid area below the header to locate the document. Click the to the right of the File field; the Windows File Explorer will open. Locate and select the file to be attached then double-click on the file name. If you want to add more than one file, highlight the first file, the hold down the CTRL key on your keyboard to select additional files.

4. The File name, Description, Security Level and Document Type will fill in on the first line of the file grid area. If additional documents are being added at this time, proceed to the next line in the file grid and follow the instructions from step 3 above. Continue until all documents to be attached are listed. As each new file is added to the file grid, the Description, Security Level and File Type (Document Type) will default from the information that was entered in the header area of the Document Add form. Modify each file line with the appropriate selections.

5. Once the document has been uploaded, it will be displayed in the Job Documents list [within the Job record] and in the Job Documents folder within the Customer Explorer.

Scan New Document

To scan a document to a job, follow the instructions below.

1. Open the Job record where a document will be attached. Once the Job record is open, select the Tools toolbar, then select the Documents button on the Tools toolbar. Position your mouse in the white area to the right, right-click and select the Scan New Document option.

2. The SedonaScan interface will be displayed. If this is the first time a document is being scanned into SedonaDocs, you will need to select the device installed at your workstation.

a. From the SedonaScan form, click on the Setup button at the lower left of the form.

b. The Select Source form will be displayed. Click on the scanning device you will be using, then click on the Select button. Click on the in the upper right of the form to return to the SedonaScan form.

3. On the SedonaScan form, type in the name for the File, a Description, select the appropriate Security Level from the drop-down list, and finally, select the appropriate Document Type from the drop-down list. When finished filling out the form, click on the Scan button located at the lower right of the SedonaScan form.
The interface of your scanning device will be launched.

4. Your Scanner device will begin scanning the document. Once the scanning has completed, a pop-up message will appear stating the scan is complete along with the number of pages that were successfully scanned and saved. Follow the same process to scan additional documents.

5. Once the document has been uploaded, it will be displayed in the Job Documents list [within the Job record] and in the Job Documents folder within the Customer Explorer.

Edit Document Properties

To edit the properties of a document attached to a job, follow the instructions below.

1. Open the Job record where a document will be edited. Once the Job record is open, select the Tools toolbar, then select the Documents button on the Tools toolbar. On the right, highlight the document to be edited, right-click and select the Edit Document Properties option.

2. The Document Edit form will be displayed. Make the necessary changes then click the Update button located at the lower right of the Document Edit form. When a document is edited, the User name and the update date and time are saved to the document and displays in the Documents list.

Delete a Document

To delete a document attached to a job, follow the instructions below.

1. Open the Job record where a document will be deleted. Once the Job record is open, select the Tools toolbar, then select the Documents button on the Tools toolbar. On the right, highlight the document to be edited, right-click and select the Delete Document option.

2. A confirmation message will be displayed; click on the Yes button to proceed to delete the document.

Caution - deleting a document is permanent; make certain you have selected the correct document.

When a document is added, edited or deleted, and entry is made into the Job Log.