

Viewing and Editing External Documents

You can maintain the external documents that you have attached to your Job Bag.

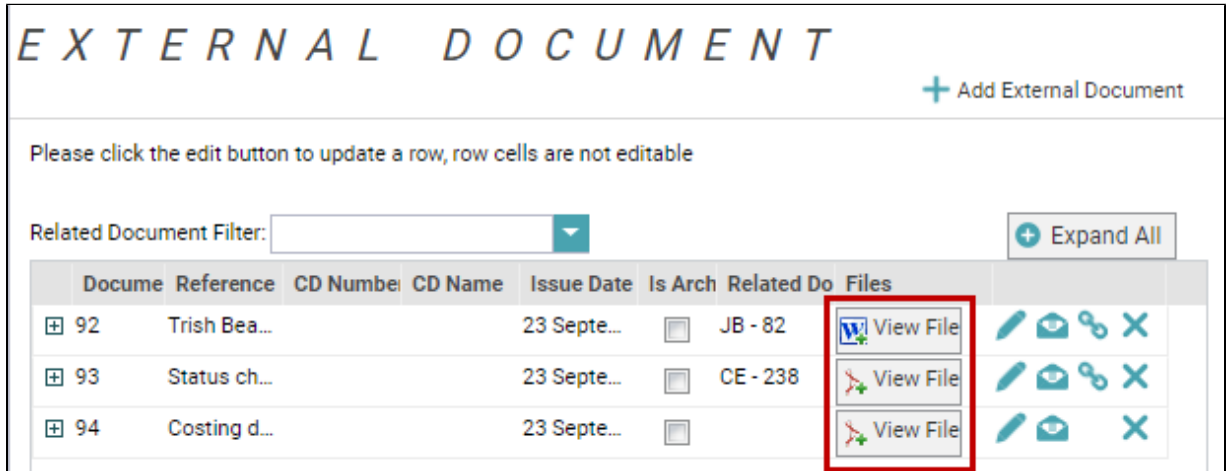
This includes:

Viewing an external document

You can view the documents that have been attached to a Job Bag.

1. On the **External Document** screen, click on the **View File** button against the document you want to view.

This will download the document.



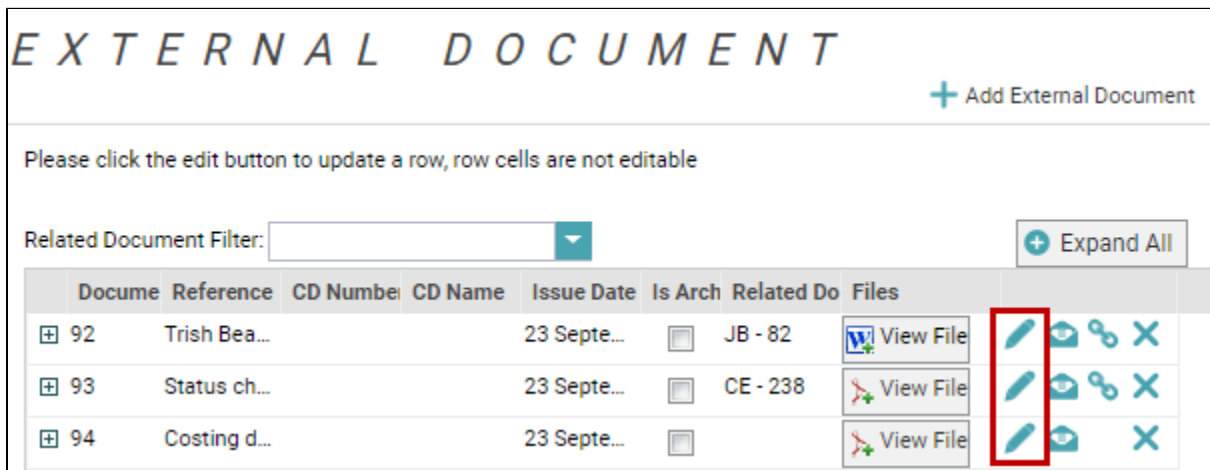
The screenshot shows the 'EXTERNAL DOCUMENT' interface. At the top right, there is a '+ Add External Document' button. Below the header, a message states 'Please click the edit button to update a row, row cells are not editable'. A 'Related Document Filter' dropdown and an 'Expand All' button are also visible. The main content is a table with columns: Docume, Reference, CD Number, CD Name, Issue Date, Is Arch, Related Do, and Files. Three rows are shown, each with a 'View File' button highlighted in a red box. The first row has a Word icon, the second and third have PDF icons.

Docume	Reference	CD Number	CD Name	Issue Date	Is Arch	Related Do	Files
92	Trish Bea...			23 Septe...	<input type="checkbox"/>	JB - 82	View File
93	Status ch...			23 Septe...	<input type="checkbox"/>	CE - 238	View File
94	Costing d...			23 Septe...	<input type="checkbox"/>		View File

Editing external document details

You can edit the details of an external document. You can add a new version of the document, edit the description field notes or edit the reference field notes etc.

1. Click on the **Edit Document Details** button and edit the details on the External Document screen.



The screenshot shows the 'EXTERNAL DOCUMENT' interface, identical to the previous one. In this view, the 'Edit Document Details' button (represented by a pencil icon) in the 'Files' column of the first row is highlighted with a red box.

2. Add notes in the **Description** describing your change.
3. Click the **Save** button to save your changes.

Adding different versions

Documents go through a number of revisions before they become the final document. It is often important to remember the different versions to establish the development of the final document. It is therefore important to be able to differentiate between the different versions by giving each their own unique number.

1. Click on the **Edit Document Details** button and click on the **Add Version** button to add a new version of the document.

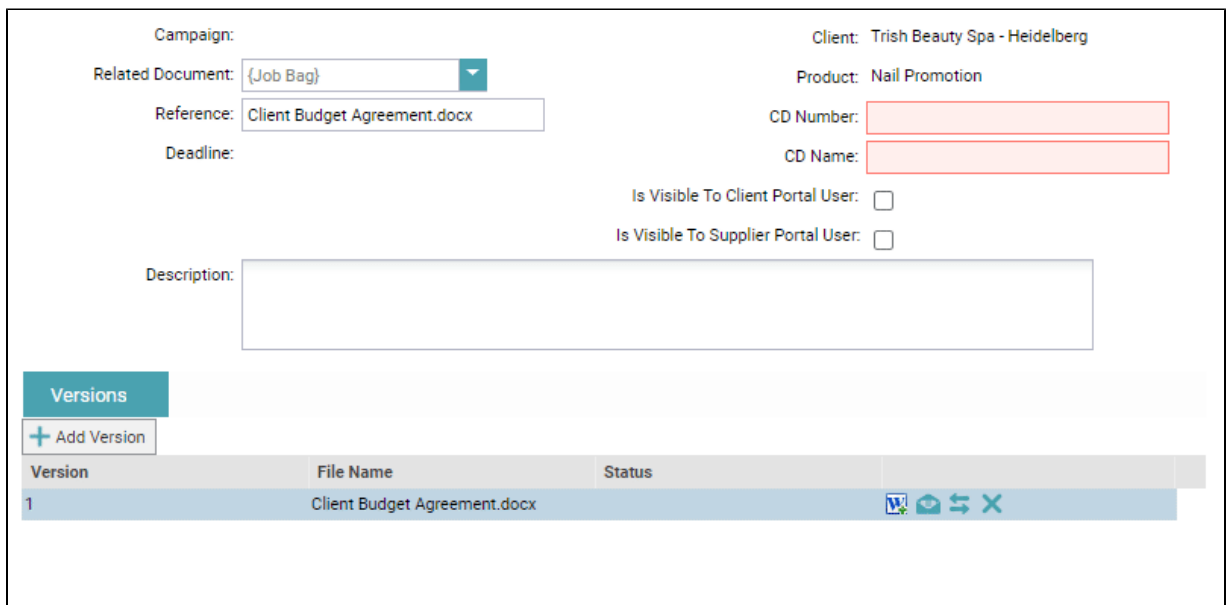


2. Drag and drop the file you want to attach onto the **Document Upload** dialog, and then select **Upload**.

Deleting documents

It is possible to delete External Documents if you uploaded the wrong file, uploaded a duplicate, or if you uploaded it to the wrong job.

1. Click on the **Edit Document Details** button.
2. Click the **Delete this line** button against the document you want to remove and select **Yes** to delete the line.



The document is removed from the **External Document** screen.

Replacing documents

If you have made an error on a document or uploaded the wrong file, you can replace it.

Although you cannot edit the document in Chase, you are able to replace it with a correct document from external sources. You first need to make the changes to the document before you can replace the original document that has been uploaded in Chase. Alternatively, you can save it as a later version so that you keep track of any changes made to the file or document.

1. Click on the **Edit Document Details** button against the document you want to edit.

2. Click on the **Change File** button.



The screenshot shows the 'EXTERNAL DOCUMENT' interface. At the top, there is a header with the text 'EXTERNAL DOCUMENT' and a navigation arrow pointing left with the number '9 2'. Below the header is a 'Versions' section with a '+ Add Version' button. A table with the following columns is displayed: 'Version', 'File Name', and 'Status'. The table contains one row with the following data: '1', 'Trish Beauty Spa Requirements.d...', and a set of icons including a document icon, a magnifying glass, a red square with a white 'S' (the 'Save' button), and a close icon. The 'Save' button is highlighted with a red square.

Version	File Name	Status
1	Trish Beauty Spa Requirements.d...	   

Drag and drop the file you want to attach and click the **Save** button to save the changes.

This can all be performed from the External Document screen in a Job Bag.

Related articles

Content by label

There is no content with the specified labels

