ARC ID – 6611 Linked Documents Autolaunch
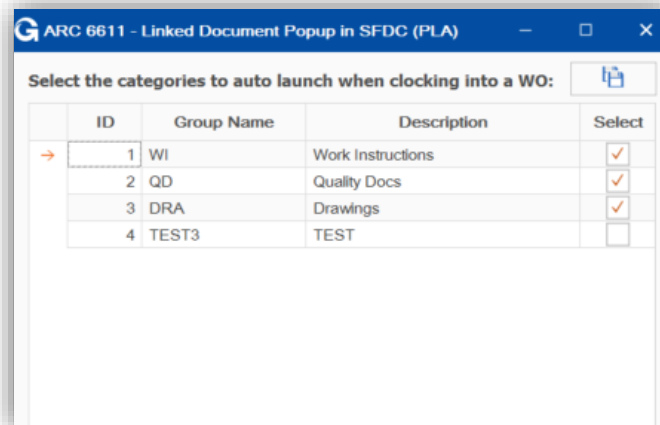
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Customer: Spectral Systems

Business Case: Customer is looking to have the ability to have documents that are attached to part numbers to launch automatically on SFDC when an employee clocks into a WO.

This project is launched off the Post-Start Job hook in SFDC.Net screen. A maintenance menu has been created to allow an admin user to select the document control groups they would like to auto launch with this project. Custom menu item created under Online System - Administration - SFDC Linked Documents Maintenance [6611].

Project's step by step

1. After the user clicks on the new custom menu item, all existing document control groups will be displayed. The user will have the ability to select only the categories from the documents they would like to auto launch with this project. The user would need to click on 'Save' button to save the current selections.

2. The program will run as soon as the user clocks into a WO. It will identify the WO's part and validate if there are documents linked to it. If so, only the documents from the selected categories will be automatically opened.

3. All linked documents will be displayed as long as Windows has a default program set for the file type. I.e. The program would open a .docx on Word, a .pdf as a PDF in the user's default PDF viewer (Adobe, Microsoft Edge, Chrome, etc), a .xlsm on Excel, etc.