

**ShopFloorManager Tech Notes**  
**"Creating Sign-Off Flow Charts..." for a Complete ISO9000 Approval System PDF Version**  
**Sign-Off Flow Charts Customer Assignable Ordered "Sign-Off States" with Approval Criteria**  
**Limitless Sign-Off "Links" Controlling Document/File/Packet Release into Engineering & Production**  
**Supports Windows 8™, Windows 7™ & Windows™ XP including Support for Terminal Server 2003/2005/2008**

Sign-Off Flow Charts is part of the ISOApproval™ Module which supports Creating and Establishing Multi-Level ISO9000 Approval Criteria for Controlling All of your File, Document & Packet Approvals and Release into Production.

This includes: Establishing Birth and Death Dates, Multi-Level Sign-Off and Approval States, Controlled Check-Out/Check-In of All File/Documents/Packets using ShopFloorManager™ or a Shop Floor Application, Automatic Archiving and Complete Histories of Active, Deleted and/or Old File/Documents/Packets

**Sign-Off Flow Charts: Controlling Document's, File's & Packet's Approval and User's Access**

**ShopFloorManager Runtime - "Sign-Off Flow Charts..."**

**Overview:**  
A "Sign-Off Flow Chart" is a customer creatable List of "Sign-Off States" which can be associated with Objects such as Documents, Files and Packets. This "Sign-Off Flow Chart" then provides a Structured Approval Process that these Objects must "travel" before they are completely Approved by "Release into Production", "Engineering", "Quality", etc.

**Note:** See the Guide for Creating Sign-Off States which details details which Sign-Off of each of these Objects and in which Order for each "Sign-Off State".

**Important:** Organizations can create as many "Sign-Off Flow Charts" as needed to handle every type of Document(s), File(s) (Packets) that are required to be "Approved" before releasing to Engineering, Production, Quality, etc. These procedures are covered in any number of Approval Steps.

**Sign-Off Flow Charts... Window - New Sign-Off Flow Chart**



**Caution:** First be sure you are using the configured ShopFloorManager for using the Approval Model if you have not all Documents, Files and Packets are automatically Approved. E. You are not using the ISO9000 Model that requires Approving of all critical Documents!

**Note:** ShopFloorManager comes with a Simple Default "Sign-Off Flow Chart" that allows Documents, Files or Packets to be in one of two States: Unapproved or Approved. Use this simplified model if your needs are such that you only need a simple binary Approval System. For your requirements are Multi-Dimensional then you can create your own Multi-Dimensional "Sign-Off Flow Charts" which contains any number of "Sign-Off States" created by you!

**Example:** Above you can see the Simple default "Sign-Off Flow Chart" with the two default "Sign-Off States" along with a Multi-Dimensional "Sign-Off Flow Chart" with Multi-Dimensional "Sign-Off States".

**Important!** To better understand ShopFloorManager's Approval System see the Guide for Creating "Sign-Off States".

**Do This:** In the above Window click on the New Button and the following Window will be displayed:

**Creating A Sign-Off Flow Chart**

**New Sign-Off Flow Chart Window:**

Type a new Sign-Off Flow Chart Name: [ ]

Sign-Off Flow Chart Name: [ CD Standard Flow Chart ]

**Important:** Enter the name of the "Sign-Off Flow Chart" choosing a name that makes sense for your organization for this particular Approval Process. You can rename the "Sign-Off Flow Chart" at anytime which automatically updates it through-out ShopFloorManager!

**Example:** In this Example the "Sign-Off Flow Chart" is for CD's Standard Sign-Off Flow Chart for Pre-Engineering.

**Note:** Click the OK Button and the following Window will be displayed:

**Creating A New Sign-Off Flow Chart**

**Sign-Off Flow Charts... Window - New**

The screenshot shows the 'New Sign-Off Flow Chart' dialog box with the 'New' button highlighted. The list of Sign-Off Flow Charts now includes 'HARTFORD STANDARD FLOW CHART' and 'CD STANDARD FLOW CHART'.

**Below:** As you can see the new "Sign-Off Flow Chart" "CD Standard Flow Chart" contains the default Sign-Off States: UNAPPROVED and APPROVED which are always required on all "Sign-Off Flow Charts" since the starting state is always UNAPPROVED and the final state is always APPROVED!

**Note:** There can be any number of "Sign-Off States" in-between these required states!

**Important:** The Default "Sign-Off States" Names of UNAPPROVED & APPROVED can be Renamed to suite a Customer's particular needs but their Functionality can not! (This section is regarding these States to avoid confusion!)

**Do This:** To add "Sign-Off States" to this Sign-Off Flow Chart click on the Properties Button and the following Window will be displayed:

**Select and Order Sign-Off States For Use In This Sign-Off Flow Chart**

**Edit Approval and Sign-Off "Require SignOff for Approval" Check-box not Checked Window**

**[ Edit Approval and Sign-Off ]**

Sign-Off Flow Chart: [ CD STANDARD FLOW CHART ]

Copy Sign-Off Steps by selecting the set of Sign-Off States and then order UNAPPROVED (Initial State, Start of Sign-Off) is always the first step, APPROVED (Final Approval, Sign-Off Finished) always the last step. You can also customize it, always the last step from a different item.

For each Sign-Off Step, select the set of User Groups that must sign off for that step and:

Require Who Must Sign-Off in Which Order

Require Sign-Off for Approval

Authorized User Groups: [ ]

Sign-Off List: [ ]

Current Step: [ 1- UNAPPROVED ]

Available States: [ 1- UNAPPROVED, 2- Development, 3- PRODUCTION ]

**Do This:** In order to activate the "Sign-Off Flow Chart" so you can, in this case, add "Sign-Off States" you will need to check the "Require Sign-Off for Approval" Check box. Once this is done there will be several Sub-Windows & Text Areas become Active as follows:

**Select and Order Sign-Off States For Use In This Sign-Off Flow Chart**

**[ Edit Approval and Sign-Off ]**

Sign-Off Flow Chart: [ CD STANDARD FLOW CHART ]

Copy Sign-Off Steps by selecting the set of Sign-Off States and then order UNAPPROVED (Initial State, Start of Sign-Off) is always the first step, APPROVED (Final Approval, Sign-Off Finished) always the last step. You can also customize it, always the last step from a different item.

For each Sign-Off Step, select the set of User Groups that must sign off for that step and:

Require Who Must Sign-Off in Which Order

Require Sign-Off for Approval

Authorized User Groups: [ ]

Sign-Off List: [ ]

Current Step: [ 1- UNAPPROVED ]

Available States: [ 1- UNAPPROVED, 2- Development, 3- PRODUCTION ]

Uses as User Group: [ ]

State: [ ]

**Important:** Following are descriptions of the various Sub-Windows & Text Areas in the above Window and what their functions are as part of the Approval Process:

**Setting Up "Sign-Off for Approval" Options:**

- Available States**  
Note: This is the List of "Sign-Off States" that can be added to the "Sign-Off Flow Chart". All of these "Sign-Off States" have been created in the "Sign-Off States" Module. Once added to the "Current Step" Window it will be removed from "Available States" Window and placed in the "Current Step" Window.
- Current Step**  
Note: This is the Current List of "Sign-Off States" that have been added to this "Sign-Off Flow Chart". This "Sign-Off Flow Chart" will be associated with Documents, Files or Packets and used to control the "Flow" by "Take" Approval process for Final Approval. See the Guide for "Creating Sign-Off States".
- Select Sign-Off Order Steps**  
Note: This setting will be used if the Sign-Offs are forced to be done in the Displayed Order or Randomly!
- Authorized User Groups**  
Note: This is a List of User Groups that one of its Users needs to Sign-Off that can be added to Sign-Off State before it is Approved and moved to the next "Sign-Off State" or all "Sign-Off States" have been Approved to Final Approval. Once added to the Sign-Off List Windows will be removed from "Available States" Window.
- Sign-Off List**  
Note: This is a List of User Groups that have been added to Sign-Off "Sign-Off State" in the Document, File or Packet can be Approved for the State and moved to the next "Sign-Off State" or to Final Approval.

**Important!** In the Above Window we have chosen the Development "Sign-Off State" to configure. You will need to do this for each of the "Sign-Off States" by highlighting each "Sign-Off State" and configuring them accordingly.

**Example:** If the Above "Sign-Off Flow Chart" was assigned to a Document for Approval it would have to go through Two "Sign-Off States": UNAPPROVED & Development before moving to the Final Approved State "Production". At each of these "Sign-Off States" all of the User Groups would have to Approve this Document before it moves to the next "Sign-Off State" or Final Approval.

**Do This:** After completing each "Sign-Off Flow Chart" please click on the "Save Sign-Off List" Button to Save this Form!

**Assigning a "Sign-Off Flow Chart" (A ISOApproval Module) - Manage DNC Files Window**

**Overview:**  
To give an Example of how "Sign-Off Flow Charts" are used we will show you the General Procedure for using a "Sign-Off Flow Chart" to establish an Approval Procedure of a typical File as well proceed from an "UNAPPROVED" Status to "Production" (Final Approval) Status.

**ShopFloorManager Runtime - Manage DNC Files**



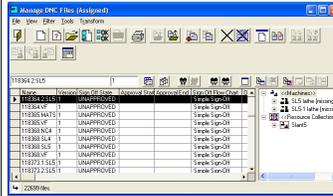
**Do This:** Click on the "Manage DNC File" icon and the following Window will be displayed:

#### ShopFloor-Manager Runtime - Manage DNC Files Icon

##### Viewing Options:

- Hide File Columns
- Hide File Resource Collections and Machines
- Assign
- View NC Programs
- View NC Source
- View Approved DNC Files
- View DNC Files with Pending Approval
- Select Sign-Off Status to Display
  - Development
  - Final
  - UNAPPROVED

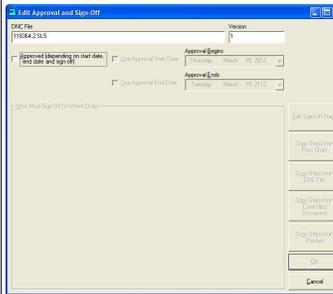
**Do This:** Click on the icon to Change this View!



**Above:** We have selected the File "1183642.BLS" for this example. You will notice that it is UNAPPROVED with a Default "Sign-Off Flow Chart" of Simple Sign-Off. An asterisk after this would only occur if the Sign Status UNAPPROVED is APPROVED/PRODUCTION. What we want to do is to select from one of the Multi-Dimensional Flow Charts we have created.

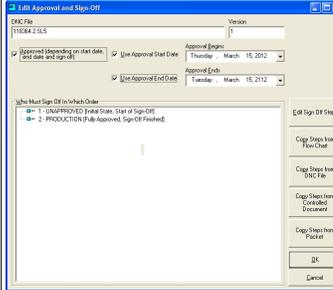
**Do This:** Click on the icon and the following Window will be displayed:

#### Sign-Off Flow Charts - Edit Approval and Sign-Off Window



**Do This:** Click on the Check-box "Approved" and the following Sub-Window and Options will be Displayed & Activated:

#### Sign-Off Flow Charts - Edit Approval and Sign-Off Updated Window



**Above:** After checking the "Approved" Check-box the following Sub-Window, Check-boxes & Buttons are Activated:

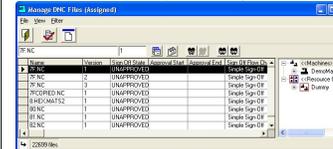
##### Options & Selections:

- **Who Must Sign-Off in Which Order Window**  
**Note:** This is the present Active Sign-Off Steps which are the Default Order.
- **Use Approval Start Date**  
**Note:** Check this box if you want to set a Start Date for this File. (Becomes De-Active)
- **Use Approval End Date**  
**Note:** Check this box if you want to set an End Date for this File. (Becomes De-Active)
- **Use Sign-Off Steps Button**  
**Note:** Clicking this button will allow you to create a "Sign-Off Flow Chart" on that File and is the same as shown above!
- **Copy Steps from Flow Chart Button**  
**Note:** Clicking on the Button will display a List of all the "Sign-Off Flow Charts" that you have created from which you can select one of them to use.

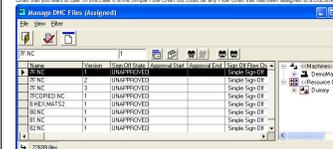
**IMPORTANT!** This will be the one we choose for this Example!



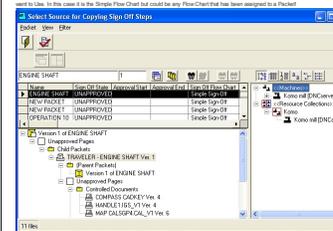
- **Copy Steps from DNC File Button**  
**Note:** Clicking on the Button will display a List of all the DNC Files from which you can select a File that has a Flow Chart that you want to use. In this case is the Simple Flow Chart but could be any Flow Chart that has been assigned to a DNC File!



- **Copy Steps from Controlled Document Button**  
**Note:** Clicking on the Button will display a List of all of the Controlled Documents from which you can select a Document that has a Flow Chart that you want to use. In this case is the Simple Flow Chart but could be any Flow Chart that has been assigned to a Document!



- **Copy Steps from Packet Button**  
**Note:** Clicking on the Button will display a List of all of the Packets from which you can select a Packet that has a Flow Chart that you want to use. In this case is the Simple Flow Chart but could be any Flow Chart that has been assigned to a Packet!



- OK Button
- Cancel Button

**Do This:** Click on the Copy Steps from Flow Chart Button and select the "CCD Standard Flow Chart" and the following Window will be displayed:

#### Sign-Off Flow Charts(CCD Standard Flow Chart) - Edit Approval and Sign-Off Window

How To Use  
Sign-Off Flow Charts

**EDS Approval and Sign-Off**

DNC File: 1100423LS

Approval Origin: Thursday, March 15, 2012

Approval End Date: Tuesday, March 15, 2012

Who Must Sign Off in Each State:

- 1 - UNAPPROVED Initial State, Start of Sign-Off
- 2 - DEVELOPMENT
- 3 - PRODUCTION Fully Approved, Sign-Off Finished

Buttons: EDS Sign Off Sheet, Copy Sign-Off Sheet, Copy Sign-Off DNC File, Copy Sign-Off Confirmed Document, Copy Sign-Off Flat File, OK, Cancel

**Do This:** Click on the OK Button and this is "Sign-Off Flow Chart" that is Used for the Approval Process for this DNC File Title Following Window will be displayed

**Manage DNC Files - Assigned**

File View Filter Tools Transform

Create New DNC File  
Create New Help Topic  
Edit Existing DNC File  
Properties

EDS Approval and Signoff for All Listed DNC Files

File Name	File Type	File Size	File Date	File Status	File Action
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off
1100423LS	EDS	100 KB	3/15/2012	Approved	Sign-Off

Buttons: Select All, Select None, Select Inverse, Copy, Copy All, Paste, Paste All, Delete, Delete All, Refresh, Refresh All, Filter, Filter All, Sort, Sort All, View, View All, Hide, Hide All, Show, Show All, Print, Print All, Export, Export All, Import, Import All, Copy to a Folder, Copy to a Folder All, Copy and Assign, Copy and Assign All, Refresh, Refresh All, Delete Selected DNC File, Delete All Selected DNC Files

**Important:** You can apply this Sign-Off Flow Chart to Multiple Files simultaneously by first manually selecting/highlighting multiple Files or by using the various methods to narrow the selected Files including ShopFloorManager's Search Criteria, Select Fields, Change View "Select DNC File View Mode", etc.

**Do This:** Once you have narrowed down the File Selections on the Manage DNC Files Window click on the File Menu-Edit and Sign-Off All Listed DNC Files and after selecting the Sign-Off Flow Chart" as stated above the Following Window will be displayed

**EDS Approval and Signoff for All Listed ... Window**

EDS Approval and Signoff for All Listed ...

Processed Items: 0 of 500

DNC File: 1100423LS

Version: 1.0

Buttons: Update File, Update All, Skip This, Skip All

**Do This:** Click on the Appropriate Button(s) for selecting the Chosen Sign-Off Flow Chart" to assign to one all of the Deployed DNC Files.