CADCAM INTEGRATION

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ShopFloorManager Tech Notes
"Managing Controlled Documents:" The Right Documents at the Right Time PDF-Version
Securely Managing all of your Controlled Documents, File Cabinets, Third-Party Tools/Data, etc.
Supports Windows 8™, Windows 7™ & Windows™ XP including Support for Terminal Server 2003/2005/2008

Manage Controlled Documents is part of ShopFloorManager's Enterprise Management System's Suite of Secure Integrated Manufacturing Software Modules & Applications built upon CADCAM Integration's Standard and Optional Modules. These Modules' included EventAware Technologies which Continually Listen & Capture all Events for processing so Manufacturing Users and Applications can be kept in Sync!

Manage Controlled Documents provides a full Document Control Management User Interface; simple ISO9000 Document Control, simple event capture; reports; virtualization; management tools: Database Management, Virtual File Cabinets, File & History Archiving and any number of upgrade options.

Manage Controlled Documents: For Managing all of your Manufacturing Office, Engineering & Quality Documents

ShopFloorManager Runtime - "Using Manage Controlled Documents"

Note: Click on the "Manage Controlled Documents" icon to display the Window that is used to Manage your Documents for Assigning to File Cabinets, Packets, Approving Documents for Production, Editing Documents, Copying, etc. This Window is used for 90% of the dealings you will have with Controlled Documents.

Manage Controlled Documents Window
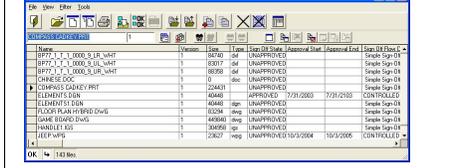
Note: The Above Window is but one of many Data Relationship Views that can exists between File Cabinets, Packets, etc. These Views allow you to establish the Data Relationships that best aid you in preforming your Document Management Functions.

You will notice that a few of the Icons in the above View are grayed out indicating that the Resources selected along with present System "State" will not logically allow you access these Functions associated with these Icons. The conditions for activating these will be explained in this Guide.

We will be discussing what Function/Feature is activated for each of the Icons on the "Manage Controlled Documents" Window in the order that they are displayed as we go through this Guide. There is an Important Feature that we will briefly cover before continuing and that is how we chose the View with which we are working.

Click on the "Change View" icon and the Following Window will be displayed.

Select Controlled Document View Mode Window

Note: The above View Window is used to select the particular Data Relationship Views that best aid you in doing you particular Function.

Important! In the following Guide we have displayed the "Viewing Options" that are used for each View Displayed. Please feel free to change these to fit your particular requirements.

Manage Controlled Documents: An ISO9000 Compliant Module

Manage Controlled Documents - Close

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click to Change View!

Manage Controlled Documents

Close Icon

Note: Clicking on the "Close" Icon Button in the "Manage Controlled Documents" Window will close this Window and return focus to ShopFloorManager Runtime or one of the other Windows that are Opened. I.e. Manage DNC Files, Manage Packets, etc.!

Manage Controlled Documents - New File Cabinet

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click to Change View!

Manage Controlled Documents

New File Cabinet Icon

Note: Select the Parent File Cabinet where you want the New File Cabinet to appear as a Sub-File Cabinet and Click on the "New File Cabinet" icon and the Following Window is Displayed:

New File Cabinet Window

Note: Choose a File Cabinet Name to reflect on the Controlled Documents or other Files & Packets you will be storing in this File Cabinet of "Documents".

Whichever File Cabinet you have Highlighted when you create a New File Cabinet it will become a Sub-File Cabinet to the Highlighted File Cabinet. You can drag & drop File Cabinets so it is easy move them around.

Important! For more details on File Cabinets see "Creating File Cabinets" in another Guide.

Manage Controlled Documents - Delete File Cabinet

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click to Change View!

Manage Controlled Documents

Delete File Cabinet Icon

Note: To Delete a File Cabinet Highlight the File Cabinet you want to Delete and Click the "Delete File Cabinet" Icon. You can only Delete a File Cabinet if you have removed all the Documents, Files & Packets contained in it.
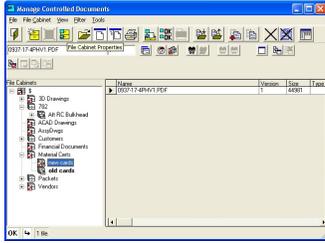
Important! For more details on File Cabinets see "Creating File Cabinets" in another Guide.

Manage Controlled Documents - File Cabinet Properties

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: To set the Properties of a File Cabinet click on that File Cabinet and Click on the "File Cabinet Properties" Icon and the Following Window is Displayed!

File Cabinet Properties-Security Window
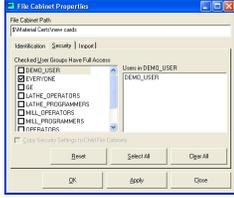
Note: File Cabinets are one the best ways for individual Users to manage their Documents, Files & Packets. ShopFloorManager provides several properties for renaming, setting security and determining how you can automatically import your documents into ShopFloorManager's File Cabinets!

Click on the appropriate Tab for Renaming(Identification), Providing Security or for setting the Import Properties that meet your Requirements.

Note: The above Window is used for setting individual Security for individual File Cabinets!

File Cabinet Properties-Import Window
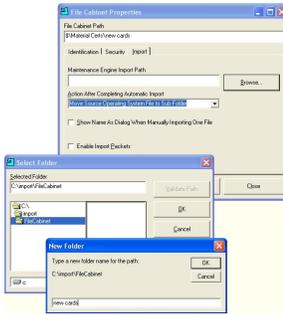
Import Options:

- Maintenance Engine Import Path - **External Folder where Documents are placed for Automatic Import.**
- Action After Completing Automatic Import
- Show Name as Dialog When Manually Importing One File - Obsolete doesn't need to be set
- Enable Import Packets - Drag Structured Folder(See Below) into Import Folder for Automatic Import or Drag & Drop to Selected File Cabinet and ShopFloorManager will Guide you through Import Options(Preferred)
- Move Source Operating System File to Sub-Folder
- Delete Source Operating System File

Window Folders Structure - Imported as Packet Structure:

Note: If you prefer not to Automatically Import your Documents and or Packets leave the Maintenance Engine Import Path Blank. You can then import Documents & Packets(See Above) by dragging and dropping them from the Window's File System to this File Cabinet or by selecting ShopFloorManager's Manual Import [icon] Icon.(Details later in this Guide).

Example: The Above Packet Structure could represent a Shop Traveler with several operations which contain Documents & DNC Files for manufacturing an Engine Shaft.

Important! For more details on Using File Cabinet & Setting their Properties see "Creating File Cabinets" in another Guide.

Manage Controlled Documents - Open Document with Native Application
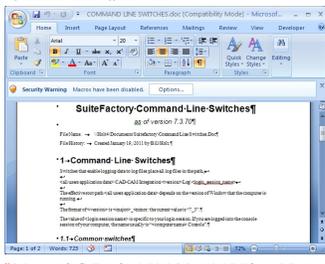
Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!
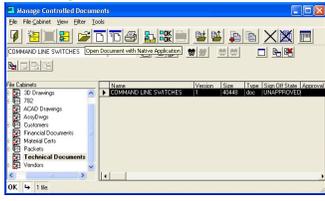
Note: Select An Existing Document and Click on the "Open Document with Native Application" Icon and the Following Application with the selected Document is Displayed!

"Open Document with Native Application" Window

Note: As you can see ShopFloorManager Opens the Native Application associated with this Document, in this case Microsoft Word, but it could be any External Application which is associated with the Document's Native Type.

Important! See Third-Party Tools for Using ShopFloorManager to provide a secure Channel to ShopFloorManager's ISO9000 Vault so External Applications can access & edit Documents while ShopFloorManager provides & manages the Document's Life Cycle within ShopFloorManager.

Manage Controlled Documents - AutoVue(TM) Document

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!
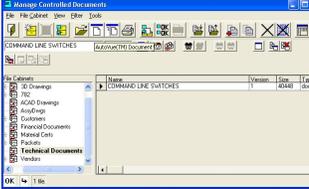

Manage Controlled

Documents

[icon]

File Cabinet Properties Icon

Manage Controlled

Documents

[icon]

Open Document with

Native Application Icon

Manage Controlled

Documents

[icon]

AutoVue™ Document Icon

Note: Select An Existing Document and Click on the "AutoVue(TM) Document" Icon and the Following Application with the selected Document is Displayed:

"AutoVue(TM) Document" Window
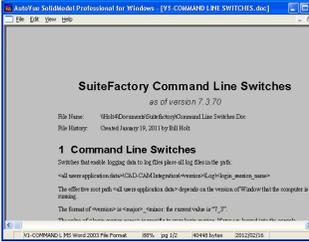
Note: As you can see ShopFloorManager Opens AutoVue which is a Third-Party Read-Only Viewer which supports over 220 different formats covering most Drawing Formats and Standard Applications such as Microsoft Word, Excel, Access, etc.

Important! See Third-Party Tools for Using ShopFloorManager to provide a secure Channel to ShopFloorManager's ISO9000 Vault so External Applications can access & edit Documents while ShopFloorManager provides & manages the Document's Life Cycle within ShopFloorManager.

Manage Controlled

Documents

Printing Icon

Manage Controlled Documents - Print

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!
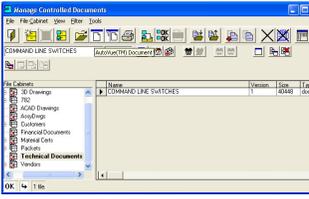
Note: Select the File you want to Print and Click on the "Print" Icon and the Application associated with this Document is displayed. You will need to reference this Application's Printing Instructions for details.

Manage Controller

Documents

Properties Icon

Manage Controlled Documents - Properties

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!
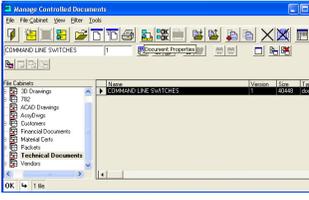
Note: Select An Existing Document and Click on the "Properties" Icon and the Following Window is Displayed:

"Properties" Window

Note: ShopFloorManager allows you to change an individual File's Properties so ShopFloorManager will know if you want to open the selected Document with the associated Native Application, AutoVue(Third-Party Viewer) or with Web Plug-Ins(Depleted).

Properties:

- Open using Native Applications
- Open using AutoVue(TM)
- Open using Web-Plug-Ins(Depleted)
- Enter "File Type" - Used so Windows can associate a Particular File Extension with Third-Party Applications.

Manage Controlled

Documents

Edit Approval

and

Sign-off Icon

Manage Controlled Documents - Edit Approval & Sign-off

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: Select the File you Edit Approval & Sign-Off "Edit Approval & Sign-Off" Icon and the Following Window is Displayed:

"Edit Approval & Sign-off" Window
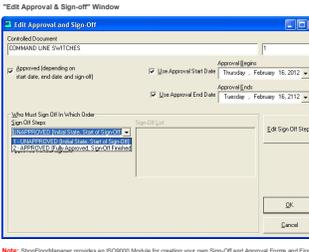
Note: ShopFloorManager provides an ISO9000 Module for creating your own Sign-Off and Approval Forms and Flow Charts for securely managing & controlling all of your Files, Documents & Packets. For details please look for Creating Sign-Off Approvals on our Website: http://www.suitefactory.com

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Manage Controlled

Documents

Your Files

Waiting For Sign-Off

The Following Shows the Lower Left Corner of "Manage Controlled Documents" Window

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Icon

Note: ShopFloorManager supports Approval & Sign-Off for all of its DNC Files, Documents & Packets. If configured, ShopFloorManager supports two States: Approved & Unapproved. You can setup a simple Sign-Off & Approval List chosen from ShopFloorManager Users which will establish an ISO9000 File Control System. If you need a more sophisticated infrastructure you can create you own Sign-Off & Approval Lists with Sign-Off Flow Charts to meet any Manufacturer's needs.

Click on the "OK Button" Icon and the Following Window is Displayed:

Note: This Window displays the Controlled Documents, DNC Files & Packets that this User has waiting to be Signed-Off for Approval. Clicking on a particular Category(DNC Files Above) will Automatically Change the View to "Files Waiting For Sign-Off".

See "Select Controlled Document View Mode" Above for Details.

Manage Controlled Documents

Sign-Off Selected Document Icon

Click on the "Sign-off Selected Document" Icon and the Following Window is Displayed:

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: Clicking on the "OK" Button will Sign-Off & Approve this Document so it can move to the next Approval Step if you have created your own Sign-Off & Approval Forms & Flow Charts. If you are using the default Sign-Off & Approval this Document has Final Approval State which allows it for Production.

Once Approved this File will no longer be displayed in this View since it is now Approved! After leaving this Window you will need to set a View Option other then "Files Waiting For Sign-Off".

Click on the [icon] Icon to "Select Controlled Documents View Mode" Window where you can chose the View Options you want.

Manage Controlled Documents

Import Icon

Manage Controlled Documents - Import Document

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: Click on the "Import Document" Icon and the Following Explorer Window is Displayed:

"Import" Window

Note: Before Browsing to the Documents you want to Import make sure you have selected/highlighted the correct File Cabinet(In the Example it is Technical Documents) in to which you want to Import the Files.

Now browse to the Document(s) you want to Import and select one or multiple Documents and click on the Open Button and the following Window will be displayed.

Setting Import Options for Each File:

Note: Chose an Option for all or each of the files and Click OK Button. Continue until complete.

Manage Controlled Documents

Copy Document to a Folder Icon

Manage Controlled Documents - Copy Document To a Folder

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: Select the Document you want to Export to a Folder and click on the "Copy Document to a Folder" Icon and the Following Window is Displayed:

"Copy Document to a Folder" Window

Note: After Selecting/Highlighting the Document you want to Export you can Browse to the Folder where you want Copy the Document or can select from the different Paths displayed above in the various Tabs.

Copying the Document to an External Folder doesn't delete or change the status of the Exported Document!

Manage Controlled Documents

Manage Controlled Documents - Copy Document Window

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Copy Document Icon

Manage Controlled Documents

Copy Document Icon

Note: Select the Document you want to Copy and click on the "Copy Document" icon and the Following Window will be Displayed:

Copy Document Window

Note: Enter a New Name or leave the name as it is. If you leave the name the same and the System is set for multiple versions a new version number will be generated for this Document.

Click the Copy Button to complete the operation or the [icon] Icon to cancel.

Manage Controlled Documents

Rename Icon

Manage Controlled Documents - Rename Document

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: Select the File you want to Rename and Click on the "Rename" Icon and the Following Window is Displayed!

Rename Document Window

Note: Enter a New Name and Click the Rename Button to complete the operation(See Window below) or the [icon] Icon to cancel.

Rename Document Confirm Window

Note: Click the OK Button to complete the operation or the Cancel Button to Cancel!

Manage Controlled Documents

Delete Selected Document Icon

Manage Controlled Documents - Delete Selected Document

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

Note: Select the Document you want to Delete and Click on the "Delete Selected Document" Icon and the Following Window is Displayed:

Delete Selected Document Window

Note: Click the Delete Button to complete the operation or the Keep Button to cancel.

Manage Controlled Documents

Delete All Listed Files Icon

View of Files Selected for Deletion:

Viewing Options:

- Show File Cabinets
- All Controlled Documents
- View Approved Controlled Documents
- View Controlled Documents with Pending Approval

Note: Click [icon] to Change View!

File Selection Options

- Click on the [icon] Icon to "Select Controlled Document View Mode" Module for Options to narrow your Search
- Click on the [icon] Icon to use the Search Engine to narrow your Search
- Hold the Cntrl Key when selecting Specific Documents(Use after First using Document Selection Options 1 & 2 Above!)

Note: You can combine the Options above to narrow down the Document Selections. Click on the Delete Selected Documents Icon and the following Window is displayed.

Delete All Selected Controlled Documents Window

Note: Caution: Make sure you have selected only those Documents you want to delete en masse! Once this operation is complete all of the Documents will be deleted from ShopFloorManager's main database and placed in the archived database. Trying to retrieve a large number of Documents from the archived database can be Tedious.

To continue using a Documents by Documents Mode Click the Delete, Keep or Keep All Button or click the Delete All Button.