

## Automated Document Linking

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## Description

The purpose of the auto document linking is to create references of where documents can be dropped for the program to attach to objects in the Global Shop database. Each entry will have a link type to tell the program that the documents will be making references to a specific type of Global Shop object (Parts, Sales Orders, Vendors, etc.) and a group number that will point to a specific document control group. While “No Group” can be specified by the program for a document control group, users will be required to select a link type as documents cannot be attached to the “All” type.

After opening the maintenance program for the first time, the Online Update will need to be restarted to start cycling the Linking Tool that will search the maintenance entries every hour. Adding new entries, changing entries and deleting entries will not require a restart of the Online Update.

## Interface

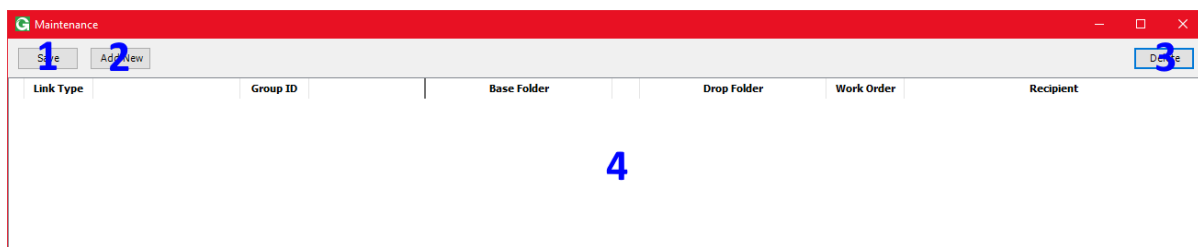


Figure 1 – Maintenance screen with labeled controls

The maintenance screen has four controls:

1. **Save** – The save button (1) is used to update the current display of the grid (4) to the database. After pressing save (1) the next run of the Linking Tool will use the new entries of the maintenance table for linking files to the database.

Right clicking on save (1) will give the user the option to update the link types in the database if there are new link types added to the Global Shop main program or change the custom link type names. Changing the custom link type names is purely a visual change for the maintenance program and has no effect on the rest of the Global Shop program or any other custom program.

2. **Add New** – The add new button (2) is used to add rows to the grid (4) for adding new maintenance entries. All new maintenance entries will need a link type and base folder before the screen can be saved.
3. **Delete** – The delete button (3) is used to removed highlighted rows from the grid (4). These deletions won't be removed from the database until save (1) is used.
4. **Grid** – The grid (4) houses the information for the maintenance program that will be used by the Link Tool to link dropped documents to their appropriate link type.

Right clicking on the grid (4) will have options for opening PDF documents that will explain the uses of the maintenance program and how to name the files that are dropped in the folders targeted by the Linking Tool.

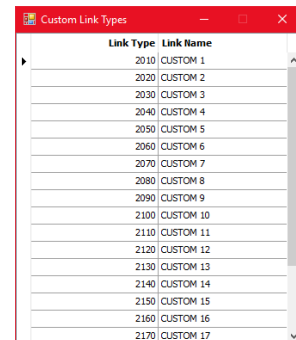


Figure 2 – Custom link type name changer

## **Folders**

Specifying a base folder for maintenance entries will specify the location of where the maintenance program will use the drop, attached and failed folders. After adding a new entry, selecting a base folder from the file browser on the grid, and saving the grid, the maintenance program will create the three folders at the location specified. These three folders are DROP, ATTACHED and FAILED. The attached and failed folders are constants that cannot be changed from the maintenance program. The drop folder can be changed by putting in a value for the drop folder column on the maintenance entry.

If an existing entry has the base folder changed, the maintenance program will move all existing files in the ATTACHED folder to the new location along with their references in Global Shop if the reference has the same link type and group ID as the maintenance entry. This means that if you're careful about how files are used with the Linking Tool, you can use the maintenance program for server migrations that will then move all your document links in Global Shop.

If a network folder is specified using its letter drive assigned by the workstation, the maintenance program will convert the path reference to its UNC path. The Global Shop server needs to be able to access network folders for the Linking Tool to work.

## **Link Types and Folders**

Different link types cannot share the same base folder and drop folder if both values are the same between the different link types. If maintenance entry A has base folder path A and drop folder A, maintenance entry B cannot have path A and drop folder A if the entries have different link types. If it is preferred to use a single base folder for all document linking with this program, link types will need a unique drop folder to allow for the same base folder to be used on all maintenance entries.

## **Groups**

Groups do not need to have their own unique path. If multiple entries are specified that use the same link type, base folder and drop folder, the Linking Tool will be able to apply each file dropped in the drop folder to create multiple unique references so that each unique group specified has access to the file. This is setup so that only one file is needed if there are multiple groups using the same base folder and drop folder.

## **Linking Tool**

After maintenance entries have been setup, all that is needed is to drop files that are to be linked in their correct drop folder path. The Linking Tool uses the file name to discern what object in Global Shop the file will be attached to. For example, if a maintenance entry is created for link type 30, which is the Inventory Master link type, dropping files in the maintenance entry's drop folder in the base folder path will cause the program to use the file name to determine what Inventory Part the document will be linked to. There's a detailed explanation of how to structure file names in the "File Names PDF" in the maintenance program.