

## Document Management Logic **updated on 07-12-24**

- Document Management Menu Option will be shifted to Masters (from Company Settings)
- Only files which can be viewed directly (.pdf, .jpeg, ...) will be used
- Upload files are classified as document type which can be called from various UI
- Each document type can be specified with allowable extensions for upload files (eg .pdf, .jpeg ...)
- Upload files are categorized as reference files & Data Entry Formats.
- Reference files have no retention date. They can only be replaced
- Data Entry Formats will have a retention period that can be set
- Data Entry Formats which are shared with Customer (Set by flag) can have their independent retention period set (as per customer requirement)
- Deletion date is set by adding the retention period to upload date
- All uploaded files will have an entry in Docu\_List Table
- All files uploaded will be assigned a file name by the logic
- All Active Reference & Data Files will be stored in a single directory (not accessible to the user)
- Viewing of file would be with provided Viewer
- All reference files when replaced will be moved to Archive Directory (whose contents can also be viewed from the viewer)
- All Data files will be deleted from the Active directory on reaching the deletion date (separate utility to be provided for housekeeping)
- Files can be uploaded from the UI only
- We will have a Document Type = Others which will allow User to upload related files. This will have a mandatory comment from the User
- Document Type = Others will have only download, no retention period, they can be replaced (like a Reference File)
- Document Type = Others cannot be deleted
- This can be created at start & is protected against deletion
- When Reference File is replaced (in Edit) in any of the calling UI, reason for replacement has to be captured - Popup 7
- Log fields are in the Excel worksheet table-field-list - filter date for 25-10-24
- [Approval logic is incorporated in the UI ... Approval is for Document Category = Reference Documents \(Master\) .. Approval is fixed in the individual UI by the User Permission](#)

Document Management

Ref. Document  
Formats / Files

xxx / xxx

Internal Data Entry  
Formats / Files

xxx / xxx

Customer Data  
Formats / Files

xxx / xxx

Files completing  
Retention Period Today

xxx

Document Type Menu option currently in Company Settings will be moved to Masters renamed as Document Management ... This is the landing Page

Viewing Dept List is concatenated string of all the Depts allowed to view the Docu Type separated by comma

File Extn(s) is concatenated string of all the Extn Types used for Docu Type separated by comma

Retention Period can be displayed in xx Yr xx M

Document Type Name

Document Type Name

Uploading Dept.

Department

Data Entry  
Format

Data Share  
w Customer

File Extn

Document Type Name	Data Entry Format	Share w Cust.	Apprv Reqd	Uploading Dept.	File Extn(s)	Viewing Departments List	Retention Period	# Files	
	y	n	n						⋮
	y	Y	n						
	n	n	y						

3 Dots  
Edit  
Delete

Enable Delete only if #Files = 0

# Files - No of files uploaded for all extn types

Add New Document Type

Popup - 1

View Retention Period for Customer Data

Popup - 3

Add Customer Data Retention Period

Popup - 4

Add / Edit Reference Document Replacement Reason

Popup - 8

View / Manage Documents

Call New Page

**Popup 7** is called by the UI where the document is uploaded. This Popup should be called after file load

**Popup 9** will be called only for Reference Document in calling UI when View Log is chosen in 3 Dots This has to be added in the 3 Dots (wherever Ref Docs are uploaded / edited)

## Popup - 1

Document Type Details

X

Document Type Name \*

Document Type Name

Document Category

Docu Category ▾

Data to be shared  
Customer

☐

Approval Required

☐

Default Retention Period \*

Year ▾

Month ▾

Allowed File Extn \*

▾

Add to List

123	.xxx Files in System	
0	.xxx Files in System	

Add New Extn.

Departments that **upload** Document Type \*

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Departments that **view** Document Type \*

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Last Updated on .... by xxx / Dept.

Save

Department that uploads by default will have box checked in View list & cannot be unchecked  
At least one other Department should be checked for Save to be carried out ... If 2nd Dept is not checked show Msg "Select at least 1 more viewing Department"

If File Extn Files are in the System then show comment .xxx Files in System (xxx = file extn). In this condition File Extn cannot be deleted. If Delete Button is clicked show Msg "Deletion of File Extn can be done after files with the Extn are deleted from the System"

Changes are applied only after Save pressed

During Upload of Document Type only the listed File Extns will be allowed

If Document Category = Data Entry Format then Data to be shared with Customer, Retention Period to be made visible. [Hide Approval check box](#)  
If Document Category = Master, display Approval Required with box checked

First Time Entry Last Updated on .... will be hidden  
Subsequent Edit will show data available in the table

When Add to List is pressed, the shown extn in the drop down is added to the grid below. If the extn shown is already in the grid, pressing add to List button will not work  
To add an extn not in the drop down, press Add New Extn. This will call Popup=2. Use also to edit Extn

## Popup - 2

File Extension List Edit / Update

X

File Extension \*

Save


At time of saving if "." not available automatically append to save as .xxx ..  
Regardless of user use of caps or small, save in small.

If entered Extn is already in list show message.

When Edit chosen current content of Extn will be shown in Text box for editing

Popup - 3

Retention Period List for Data collected for Customer



Document Type Name

Customer

Document Type Name

Customer

Document Type Name	Customer	Retention Period	# Files	
				⋮



Add Customer Data Retention Period

3 Dots  
Edit  
Delete

Enable Delete only if #Files = 0

# Files - No of files uploaded for all extrn types for Customer

Retention Period can be displayed in xx Yr xx M

## Popup - 4

Customer Data Retention Period

X

Document Type Name \*

Document Type Name

▽

Customer \*

Company

▽

Retention Period \*

Year

▽

Month

▽

Save

Last Updated on .... by ....

This Popup will appear when add Customer Retention Data is pressed

Document Type Drop down will show Doc Type where Data Entry Format = Y & Data to be shared with Customer = Y

Default Retention Period Month / Year for Document Type will be shown when first loaded. User can override

First Time Entry Last Updated on .... will be hidden  
Subsequent Edit will show data available in the table

If Document Type Name & Customer combination exists show message -  
Retention Data for this Document Type & Customer already available

View / Manage Documents

Enable / make visible when Doc Category = Ref Doc Status : To be Approved, Approved, Not Approved



Document Type Name

Document Type Name

Docu Category

Docu Category ▾

Uploaded by

Person ▾

Approved by

Person ▾

Upload Dept

Department ▾

File Extension

Extn. ▾

Ref Doc Status

Status ▾

Data Shared with Customer

☐

Archive

☐

Part No

Enter Part No 🔍

WO No / Date

WO No / Date ▾

Routing

Routing ▾

Opr No

Opr No ▾

Upload From

Apprvd From

Customer

Enter Customer ▾

Customer PO

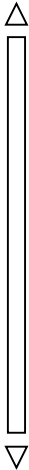
PO No ▾

Upload To

Apprvd To

☐ Select All

	Document Type Name	Status	Upload Date	Uploaded by	Apprv Date	Apprvd by	Customer	PO No / WO No	Part No / Desc	Routing	Opr No	Retain up to	View	Down load	
<input type="checkbox"/>															
<input type="checkbox"/>															
<input type="checkbox"/>															



Delete Selected Files

Delete Action to be taken after showing confirmation dialog box

This can be a separate page  
On exit of this page control will go to landing page of Document Management

When Admin logs in, Selection & Delete Selected files to be made visible / active for others this is disabled / not visible

When View icon is clicked open view dialog box - Popup 5

Archive flag can be set only when Document Category = Reference

When Download icon is clicked show file explorer dialog box for selecting directory to save to

3 Dots  
Change Retention Date  
View Log

User Popup 6 for Retention Date Change

## Popup - 5

View Documents

X

Document Type : xxxx    Uploaded by xxxx on xxxxx  
Retention Date : xx-xx-xxxx

Part No / Desc : xxxx / xxxx    Customer : xxxx    PO No / WO No  
Routing No : xxxx    Opr No : xxx

Popup to view document

Provide Document  
View controls - Zoom  
in / zoom out, ...  
typically available  
with pdf viewer

View window should  
be able to handle pdf,  
txt, ....

Popup - 6

Retention Date Change

Current Date up to which Document is retained

Date (View Field)

New Date up to which Document to be retained  
(Date to be later than above)

Save

Retention date can shifted to a later date.

Popup - 7

Reference / Master File Replacement

Reason for File Replacement \*

Choose from Drop Down

Comment

Enter Comment

Save

Popup - 8

Reference / Master File Replacement Reason

Replacement Reason \*

Save

	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>



**Popup - 9**  
**View Only**

Reference File Replacement Log



Document Type : xxx

Part No xxxx

Date	By	Action	Reason	Comment

Action = First Upload (when done first time) - filled automatically - Reason / Comment blank  
Action = Replacement (when done subsequently) - filled by User Selection  
Approval by / Date to be filled automatically by Logic after Approval ... Action = Approval ... (Reason / Comment blank)

**Document Approval  
Flow Chart**

