

Document Management Logic **updated on 25-10-24**

- 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 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

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.	Uploading Dept.	File Extn(s)	Viewing Departments List	Retention Period	# Files	
	y	n						⋮
	y	Y						
	n	n						

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 Category

Data to be shared Customer
☐

Default Retention Period *
Year
Month

Allowed File Extn *
Add to List

	.xxx Files in System	
	.xxx Files not 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

This Popup will replace existing Add Document Type Popup

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

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

Popup - 2

File Extension List Edit / Update
X

File Extension *

Save

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

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



Document Type Name
Document Type Name

Docu Category
Docu Category ▾

Uploaded by
Person ▾

Upload Dept
Department ▾

File Extension
Extn. ▾

Data Shared with Customer
☐

Archive
☐

Part No
Enter Part No 🔍

WO No / Date
WO No / Date ▾

Routing
Routing ▾

Opr No
Opr No ▾

Upload From

Upload To

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

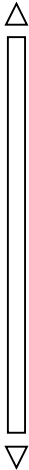
When Admin logs in, Selection & Delete
Selected files to be made visible / active
for others this is disabled / not visible

Customer
Enter Customer ▾

Customer PO
PO No ▾

☐ Select All

	Document Type Name	Upload Date	Uploaded 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

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

	<div></div>
	<div></div>
	<div></div>
	<div></div>

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 logic

View Documents

Backup we will use if other UI does not look good

x

Document Type Name

Docu Category

Document Type Name

Docu Category

Uploaded by

Person

Data Share w Customer

Archive

Part No

WO No / Date

Enter Part No

WO No / Date

Routing

Opr No

Routing

Opr No

Customer

Customer PO

Enter Customer

PO No

Upload From

Upload To

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

Document Type Name	Upload Date	Uploaded by	Customer	PO No / WO No	Part No / Desc	Routing	Opr No	Retain up to	View	Down load	



3 Dots
Change Retention Date

User Popup 5

