Document Management Logic 08-09-24

- 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)
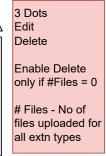- Files can be uploaded from the UI only

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 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						

Add New Document Type	View Retention Period for Customer Data	Add Customer Data Retention Period		View Documents

Popup - 1

Document Type Details   X

Document Type Name *   [Document Type Name]

Document Category   [Docu 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	🗑

Departments that **upload** Document Type *

☐	
☐	
☐	
☐	

Departments that **view** Document Type *

☐	
☐	
☐	
☐	

Last Updated on .... by xxx / Dept.   [Save]

File Extension List Edit / Update   ⌄

File Extension *   [   ]

	🖊
	🖊
	🖊
	🖊

[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

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If Document Category = Data Entry Format then Data to be shared with Customer, Retention Period to be made visible

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

Accordian will allow addition of new File Extn or Editing of existing

At time of saving if "." not available automatically append to save as .xxx

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

Popup - 2

Retention Period List for Data collected for Customer   X

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 extn types for Customer

Retention Period can be displayed in xx Yr xx M

Popup - 3

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

View Documents

X

Document Type Name

Document Type Name

Docu Category

Docu Category ▽

Part No

Enter Part No 🔍

WO No / Date

WO No / Date ▽

Customer

Enter Customer ▽

Customer PO

PO No ▽

Upload From

📅

Upload To

📅

Uploaded by

Person ▽

Data Share w Customer ☐   Archive ☐

Routing

Routing ▽

Opr No

Opr No ▽

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

Popup - 5

Retention Date Change

X

Current Date up to which Document will be retained

Date (View Field

Current Date up to which Document will be retained

📅

Save

Popup - 4

View Documents   **X**

Document Type : xxxx   Uploaded by xxxx on xxxxx   Part No / Desc : xxxx / xxxx   Customer : xxxx   PO No / WO No
Retention Date : xx-xx-xxxx   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, ...