

GET - Document Library Process

Documents for trays, defined by build number and serial number range, are created and stored globally. These documents can then be linked to specific trays in one of two ways:

1. **Global Level:** Documents are accessible globally and linked generically to assets or trays.
2. **Individual Asset Level:** Documents are customized, downloaded, modified, and uploaded specifically for an individual asset.

1. Creating Documents in the Global Library

The document library is the central repository where documents are stored and categorized. It operates on two levels:

- **Global Level:** Documents added to the system are accessible to all assets meeting the defined build and serial number criteria. For example, commissioning documents can be accessed globally and filled out for specific assets.
- **Asset Level:** Documents can be tailored and saved for specific assets, such as completed commissioning forms. These are stored individually for each asset.

Documents linked globally appear as if stored at the asset level but are stored globally, while documents saved specifically against assets may include modifications and are stored locally.

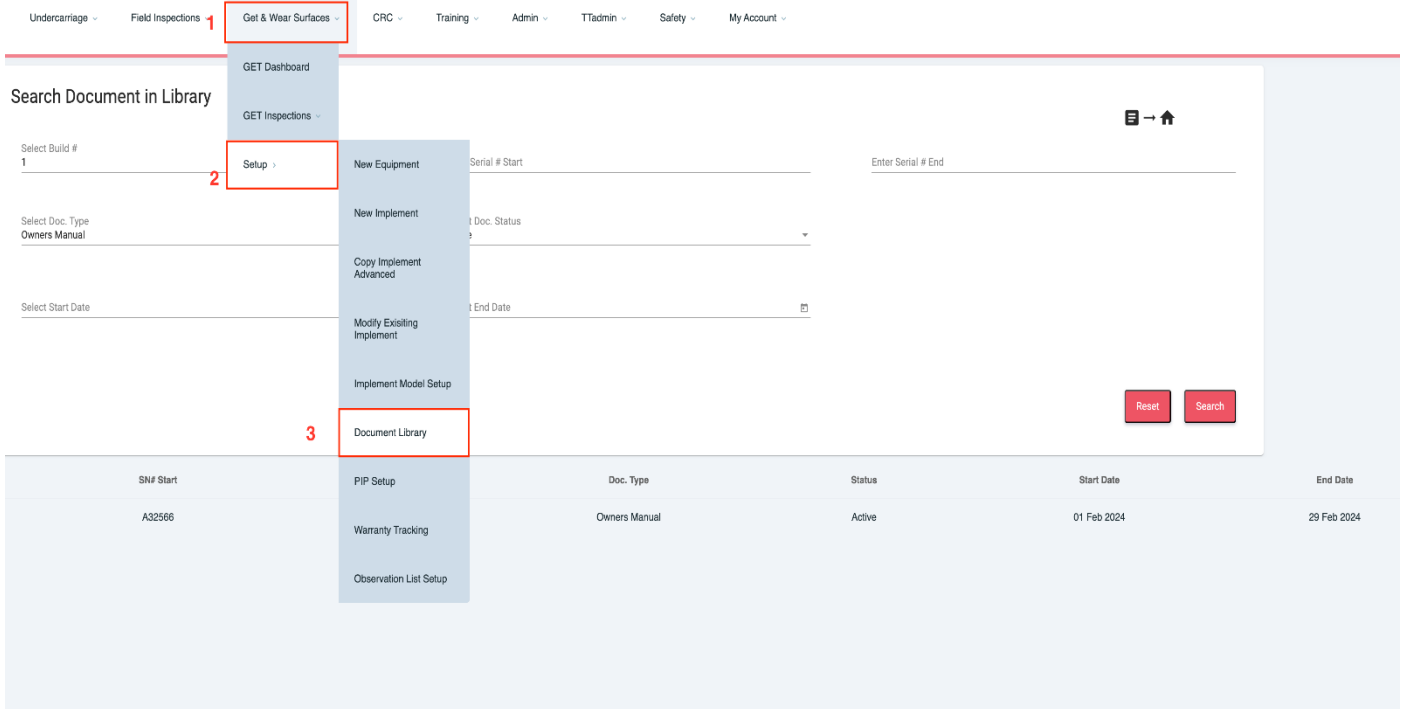
Legend:

- Global-level documents are bordered in **blue**.
- Asset-specific documents are bordered in **purple**.

2. Accessing the Document Library via the Menu

The Document Library menu option is available to **Administrators** only. From here, the administrator can:

- Search for existing documents.
- Add new documents to the library.
- Manage and categorize documents.

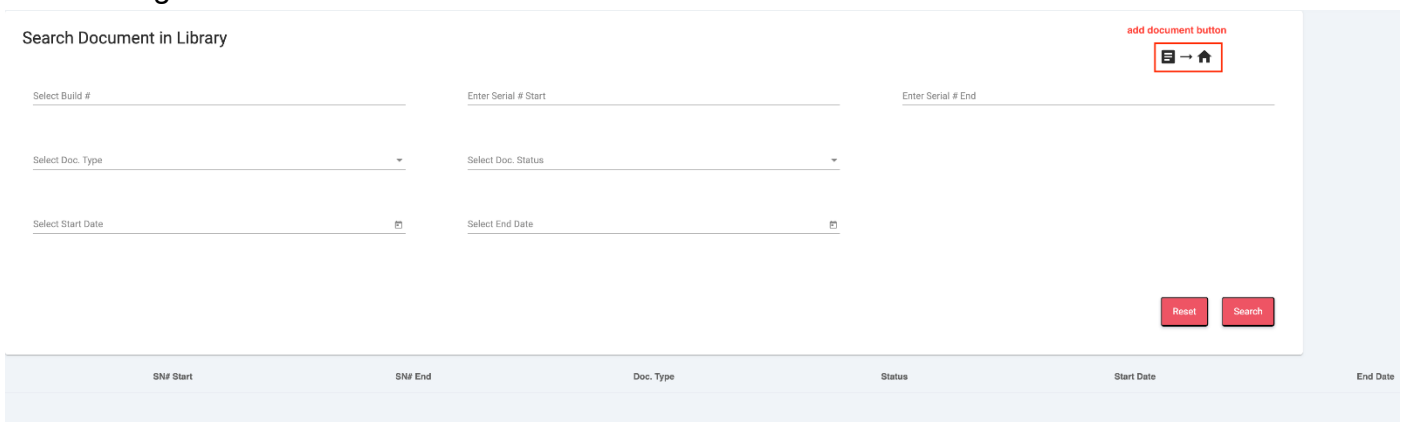


3. Searching the Document Library

The **Document Library Search Screen** allows administrators to search for and manage stored documents. Key features include:

- Document categorization by model, serial number range, type, document number, and revision number.
- Status indicators to identify active, expired, or revised documents.
- Support for various formats, including PDFs.

Adding New Documents: An icon at the top left of the search screen allows administrators to create new documents, define their criteria (e.g., model, serial range), and include an audit trail to track changes.



4. Adding Documents to the Document Library

Administrators can add documents using the "Add Document" screen, which includes:

- Fields to define the document's model and serial number range.
- Audit trail tracking changes by date, time, user, and actions performed.

5. Accessing the Document Library for Specific Trays/Assets

Users can access documents for a specific asset through the **Implement/Asset Details Screen**. Clicking the document library icon opens a pop-up window displaying:

Document Library



Display Global Doc List

Asset Document List

Incl.	Description	#	Doc.	Edit	Last Activity
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- All related documents for the selected asset.
- Global documents (linked but unaltered).
- Modified documents saved specifically for the asset.

Users can also add additional documents as needed.

6. Document Adjustments and Audit Trail

An **Audit Trail** is maintained for all document changes, ensuring traceability. The audit trail includes:

- Date, time, user, and actions performed.
- A detailed log accessible via the **Audit Button**, which opens an audit popup screen.

To view a document's audit trail:

1. Use the Document Library Search Screen to locate the document.
2. Open the **Edit Document Screen**, where the audit trail appears at the bottom.

Edit Document in Library

Select Build # *
1

Enter Serial # Start
A32566

Enter Serial # End
A32567

Select Doc. Type *
Owners Manual

Select Doc. Status *
Active

Select Start Date
1 Feb 2024

Select End Date
29 Feb 2024

Return to Search Screen

Reset Update

Attach Doc. + Automatically Add to Assets defined by above selection criteria