Document Management

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Relates to version
Tags: 9.2

Eyelit MES provides document management functionality to support both providing supporting reference materials during manufacture such as drawings and work instructions and also for capturing manufacturing data during execution. Note that files related to interfacing (e.g., flat file) are not stored in the **Document Manager**, they are stored in the **Data File Manager**.

Documents can be managed in one of two ways. They are either stored in Eyelit MES directly, or Eyelit can store references to documents stored in third party systems where documents are mastered outside of Eyelit MES, for example, in a PLM. When using third-party reference links, you can only confirm that the link was valid at a specific point in time. You rely on the third-party system to control change and store revision history.

If you store a document in Eyelit MES either because it's mastered there or you've taken a copy of a document that's mastered external to Eyelit MES, then you have total traceability of who's viewed what and when. You can see the document that was viewed as a matter of record.

If you link to a third party's document and they up-rev the document, then there are tw o possible scenarios:

1. Either the URL changes, one pointing to v1 and the other pointing to v2, then we can upversion the document in Eyelit MES.

2. The third party tool might not change its URL. You can still choose to upversion in MES to allow you to track it in MES that a change had occurred. MES can tell you that it had changed, but cannot tell you what's changed.

Entity Types

Documents that are internally or externally stored, can be associated with a host of different entities depending on their purpose:

- **Check Result Set**: Recorded quality-related results. Example, test results, photos, scans.
- **Checklist**: Document aiding the completion of a checklist, e.g., product drawing, checklist instruction document.
- **Checklist Step**: A checklist step corresponds to a predefined attribute, variable, or text parameter, which determines the type of data to be collected and its default specifications. Example, detailed drawing of the exact dimension that needs to be measured and how it should be measured.
- **Global**: Documents accessible by operators throughout a workflow. Example, H&S regulations, PPE requirements.
- **Issue**: Documents associated with item issues. Example, a photo of a non conformance or health and safety observation (e.g., trip hazard).
- **Item**: Documentation related to an item. Example, a label print scan or external diagnostics PDF document.
- **Job**: Job-specific documents. Example, certificate of conformance, customer-specific order details.
- **Operation**: Documents related to a workflow operation. Example, work instructions or video of how to do the operation.
- **Product**: Documents related to a product. Example, a URL to an external QMS location or a product drawing or specification document.
- **Recipe**: Documents related to a recipe. Example, URL link to a detailed specification in an external location.

File Types

You can restrict which file types are permitted for upload or download within the Eyelit MES environment. This requirement ensures that only appropriate file formats are used for a document type, serving as a security measure to ensure that files are the correct type are used.

For documents stored in Eyelit MES, the following types are supported: CSV, DLL, EXE, PNG, BMP, JPG, JPEG, JSON, BTW, NLBL, HTTPS, PDF, RTF, TXT, MP4, AVI, XLS, XLSX, XML.

Enable/Disable Download of File Types

You can specify if a File Type is not allowed to be uploaded, downloaded or both.

1. Navigate to the **Document Manager** screen and click the **File Types** button.

2. Select a **File Typ**e, and click **Disable Upload**/**Disable Download** button as required for that file type. The default allows both uploads and downloads.

Note:

1. It is not possible to upload video files – these must be linked via URL.

2. There are two options for linking URLs within MES (note that you should only use trusted, secure URLs - https only):

    - **Web Page**: If you select this option the URL content will be embedded the MES webpage. It is recommended to test viewing of any documents of this type immediately to make sure they can be viewed as some external websites may block this.
    - **New Web Browser Tab:** This will automatically open a new web browser tab routed to the URL configured. This allows for URLs that are not allowed to be embedded in external websites.

Document Types

Documents can be used for a wide range of purposes. Each of these might require a different level of control and a different set of people who have that control. For example, QA team vs Engineering team vs H&S team vs Production Team.

Document Types enables you to set different levels of control and different permissions for documents in different areas of the system, most notably a clear separation of definitional standards documents (e.g., product drawings and specifications, work instructions), and transactional, evidential documents (e.g., issue and item documents).

Create a Document Type

To configure a Document Type:

1. Navigate to the **Document Manager** screen and click the **Document Types** button.

2. Click the New button to display the **New Document Type** screen.

3. Complete **New Document Type** screen

New/Edit Document Type

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Provide a name for the **Document Type**.

- **Description**: Description of the **Document Type**.

- **Controlled***: A document can be controlled or uncontrolled. Options:

    - **Yes**: The document is controlled. It cannot be edited. Any changes must be enabled through the creation of a new version.

    - **No**: The document is uncontrolled. The user requires the configured permissions to make changes.

- **Entity Type***: Allows you to designate document types for a specific use. Note that when you select an entity type the default permissions for that type will be populated in the **View Permission** and **Add/Edit Permission** dropdowns but this can be changed to a specific/custom permission, e.g., product specification vs health and safety instruction. See Entity Types.

- **File Type***: Select a File Type. See File Types.

- **View Permission***: Select the permission required to view the documents of this type.

- **Add/Edit Permission***: Select the permission required to add/edit documents of this type.

Document Manager

A well-maintained track record allows for clear auditing, version control, and accountability throughout the document lifecycle. This is a regulatory requirement for highly controlled industries such as med device and defence.

Documents have a header and versions. which specifies the document type and name.

Create a Document

1. Navigate to the **Document Manager** screen and click the **New Document** button.

2. Select a **Document Type** and provide a **Document Name**.

3. If required, provide an **External Ref** to store the version reference from the third-party system.

4. Click the **Save** button which creates the document header and the first version of the document.

Edit Documents

You can edit a document's header and version:

Header: You can only change the name when editing a document header.

Version: You can provide a note, external ref and change the status of a document version.

Document Versioning

If a document is controlled as defined by its **Document Type**, you cannot edit or replace the file. You would need to upversion to make a change. If it's uncontrolled, you can replace or edit the file without changing the version number - this will create document revisions. Record of all revisions of an uncontrolled document can be tracked in the **Revision History** screen.

You can see what changes in the revision history.

Documents can be referenced from a range of different entities in the system such as products, workflow versions, jobs, operations, etc. For each of these, you can specify which version is referenced.

A document added to the Document Manager has a header and versions. If changes are required to documents you can achieve this by adding a new major or a new minor version of the document. When doing so, you need to upload a file or provide a link.

Where documents are authored and managed in a third-party document management system, the version number in Eyelit MES may not manage the version number in the third-party system. We use **External Ref** to store the version reference from the third-party system.

Wherever you reference documents, they use the standard options for selecting a version. These are:

- *Use latest version (default)*
- *Use latest minor version for specified major version*
- *Use specified version*

New Major/Minor Version

Major and minor upversioning govern when a document change becomes effective.

You have flexibility around how to manage versions of an entity. The options are:

- **Use latest version**: Always uses the latest approved version. All existing references will default to the latest version as soon as it is approved. There is no requirement for an additional approval process for the entity that references the version.
- **Use latest minor version for specified major version (1.x)**: For any minor upversion (i.e. 1.x where x=2,3,4) all existing references will reference the change as soon as the latest minor version is approved. A major upversion will not be referenced before it has been approved and a new version of, for example, the workflow has been created that will use it.
  You might choose to create a new minor version if you need the change to take effect immediately. This change could be critical or something cosmetic like a spelling correction.

  You might want to create a new major version if the change to the document has an impact on quality (which is defined by the customer), for example, updated specifications, and it needs to follow an approval process.
- **Use specified version**: The specified version will be used irrespective of later versions of the entity.

To create a new document version:

1. Navigate to the **Document Manager**, select the document version you want to upversion, and click the **New Major Version/New Minor Version** button.
2. Complete the input screen.

New Major/New Minor Version

- **File**: Select a file. If none is selected, the existing file will be used.
- **Note**: Provide additional information.
- **External Ref**: Provide an external reference.
- **Status***: Choose the document status. Options: Active, Obsolete.

View Document

To view a document in **Document Manager**, select the document version and click the **View** button.

Where Used

You can easily see where a document is referenced from, by navigating to **Document Manager**, selecting the document version and clicking the **Where Used** button.

Replace File

Click the Replace File and select the new file that will replace the existing file.

Revision History

To view the revision history of a selected document version, select the document version and click the **Revision History** button.

Document View Logs

You can view who viewed a document and when by selecting the document version and clicking the **Document View Logs** button. View logs relating to an item can also be viewed from the **Item Status** screen.

Documents on the Shop Floor

The **Document Manager** lets you upload files and website links and reference them on workflow operations.

Documents of different types are available to view at the workstation depending on their entity type:

- **Global**: Can be launched from anywhere on the workstation, regardless of product/job/item.
- **Product**: Can be launched from any job/item for that product.
- **Recipe**: Can be launched from any job/item being made using the specified recipe.
- **Job**: Can be launched for all items being made on the specified job only (note that this can also be viewed before the job is started from the workstation).
- **Operation**: Documents linked to a specific node within the workflow and can only be viewed by operators booked onto that operation.
- **Item**: Documents linked to a specific item and can only be viewed/created when booked onto the item or within the item's Item Status.
- **Checklist**: Documents linked to a checklist and can only be viewed when booked onto that checklist (or item status)?
- **Checklist step**: Documents linked to a step within a checklist and can only be viewed when booked onto the checklist (or item status?)
- **Issue**: You need to navigate to the issue to view related documents (note that an issue may not be linked to any workstation-related entities such as an item/job/product/node).

Configure Workflow Actions

You can configure documents in the workflow designer to achieve any of the following:

- Actively display to the operator as they book on - needs to be built into the action designer.

- Be available for the operator to view via a workstation button - needs to be linked to the operation/product/recipe.

Rich Text Viewer

When configuring the **Rich Text Viewer** action, you can add content to the **Rich Text Viewer – Design View** screen. The content of this screen displays on the workstation when a user gets to this action. For more information, see the Rich Text Viewer in the **Workflow Actions** documentation.

Rich Text (Document Controlled)

This operation action references a **Rich Text** document that is saved in the **Document Manager**. The documentation versioning and management apply to these documents. For more information, see the Rich Text (Document Controlled) in the **Workflow**

Actions documentation.

Document Capture Action

The **Operation Actions** functionality in the **Design Workflow** UI includes the *Image/Document Capture Action* action type. This allows an operator who is booked onto a job to capture an image using their device's camera, upload an image from their PC, or upload documents of a specified document type. For more information, see the Image/Document Capture Action in the **Workflow Actions** documentation.

Through this action type, operators can capture images and upload documents. For example, to verify the quality of work completed or capture evidence of a defect.

When you configure the image capture/upload action, you can specify what the image/document relates to.
Your selection will be based on the document types you configured in Documentation Manager. For example, you may choose to configure: Product Image, Item Image, Operation Image, etc.

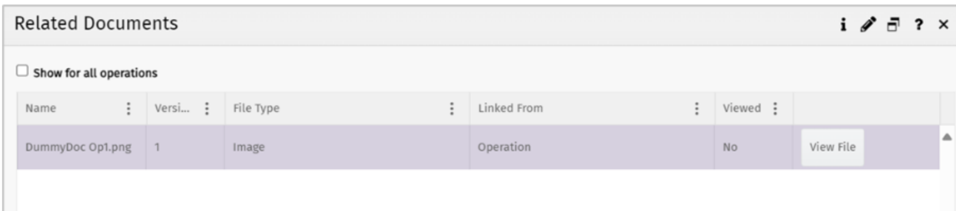
Custom File Viewer

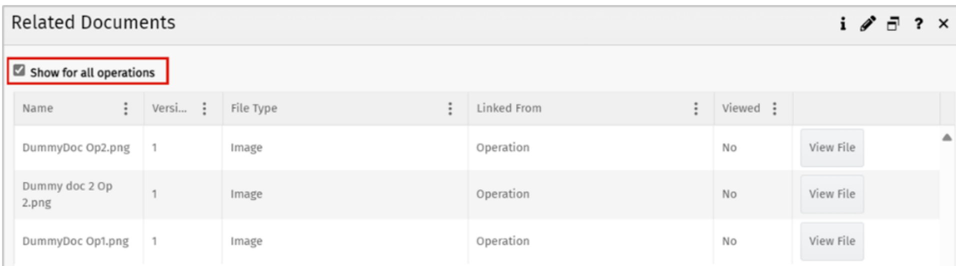
The Custom File Viewer control allows you to display a document as part of an action in the workstation screen, often alongside other controls. For example, you might show a non-conformance example and request input from the operator about the item they are working on. For more information, see Custom File Viewer in the **Workflow Actions** documentation.

View Operation Documents

When booked onto an operation on the shopfloor, you can view any applicable referenced documents. By default, only documents associated with the current operation are displayed, but it can sometimes be useful to view the documents associated with prior or subsequent operations. The document viewer feature includes a checkbox that, when checked, allows you to see all the documents linked to all the operations within the workflow.

The first image shows just the documents linked to the current operation. The second image shows the documents linked to all the operations in the workflow.





Documents for eCHR

In highly regulated sectors such as aerospace, defence, and medical device manufacturing, stringent traceability and audit standards require highly dependable record-keeping to demonstrate that products are manufactured to high quality and in full alignment with their design specifications.

Eyelit’s Electronic Control History Record (eCHR) system is purpose-built to satisfy stringent regulatory requirements. It enables precise definition of the data to be captured in controlled history records, ensures an immutable audit trail through blockchain-based storage, and supports electronic signatures for record approval. For more information, see the eCHR documentation.

For documents that are to be included in an item's eCHR you will need to:

1. Define an eCHR Profiles.
2. Define a section for the documentation in the profile.
3. Create a section config and select the Document Line Type.