

SOVELIA

User Guide

General document management

SYMETRI
ADDNODE GROUP

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1 Introduction

This guide describes SOVELIA Document Management features. The system provides you with easy way to extend SOVELIA functionality from PLM area to the management of generic office documents. The documents can be linked to other objects like items and projects, but this is not mandatory.

2 Principles

2.1 Lifecycles and rules

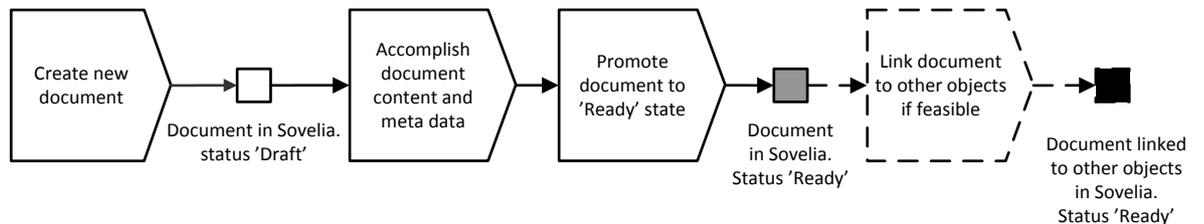
The document lifecycle is simplified and does not include any specific definition of rules.

The states for documents are:

- DRF – Draft Document stored in SOVELIA. Document is unfinished and needs to be completed before approval. Document is visible for a limited set of users.
- RDY – Ready Document is ready and cannot be changed without creating a new revision. Document is visible for a defined set of users.
- OBS – Obsolete Use of document is forbidden.

2.2 Processes and responsibilities

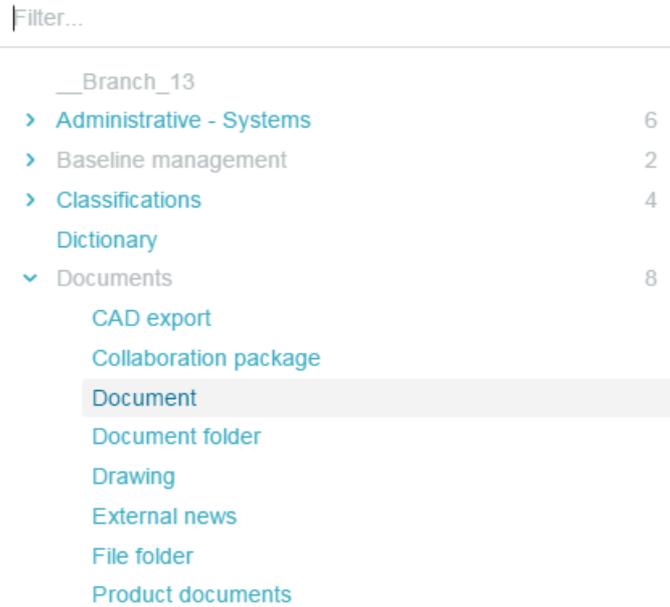
The following flowcharts describe the basic document management process until the product information is completely released. The roles are not specified as generic document management features are typically available for all organizations in a company. Document approval can be isolated to specific users in the organization if necessary.



2.3 Document data

Document data is defined in object information window

- Generic documents are located in 'Documents/Document' type



- Mandatory information on object information window are is marked with *:
 - ID Document number, typically generated automatically based on predefined series
 - Revision Document revision, typically generated automatically based on predefined series
 - Document type Defines the detailed category for the document
- Uneditable attributes are hidden by default while creating a new document

3 Functions

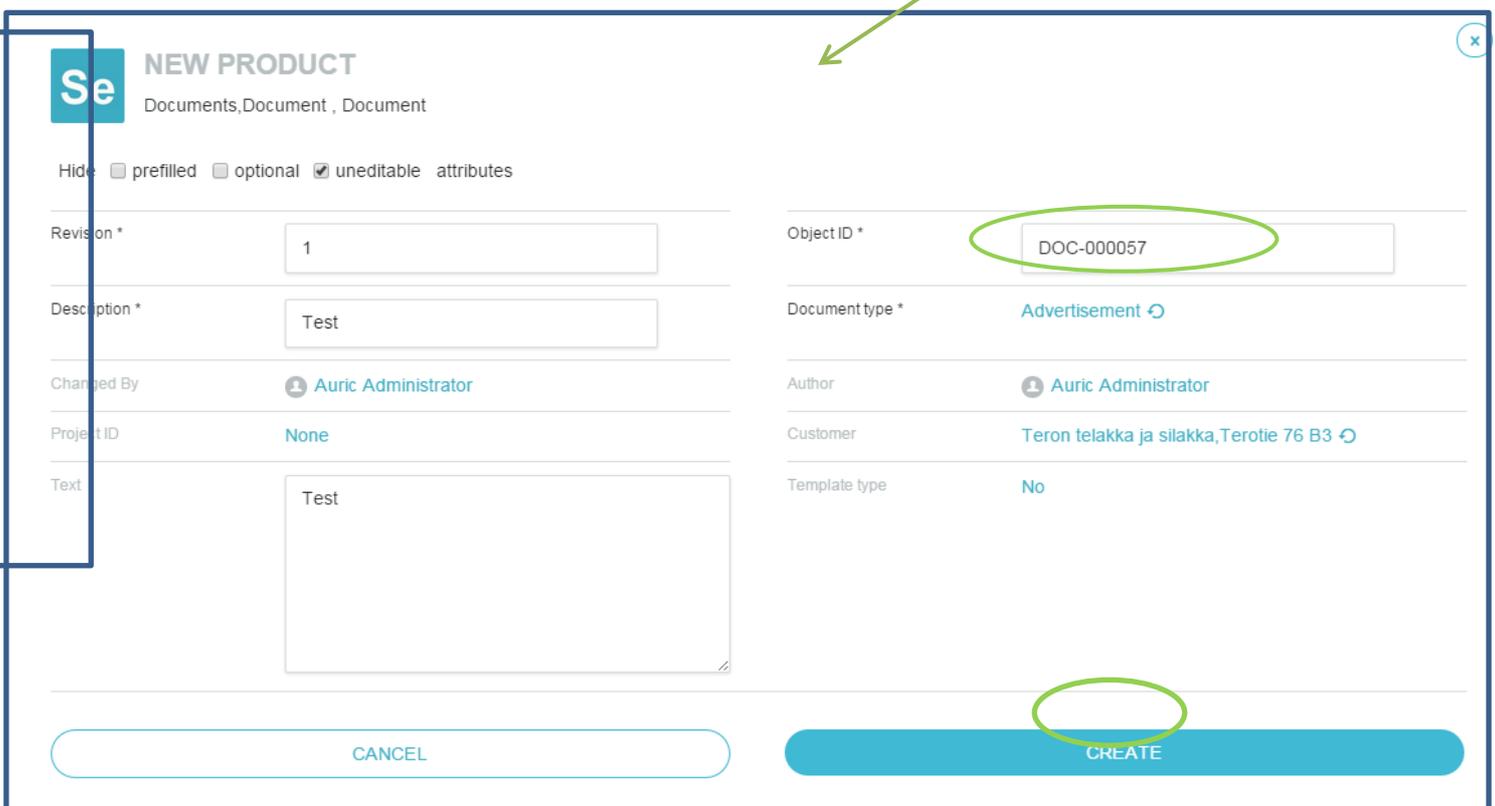
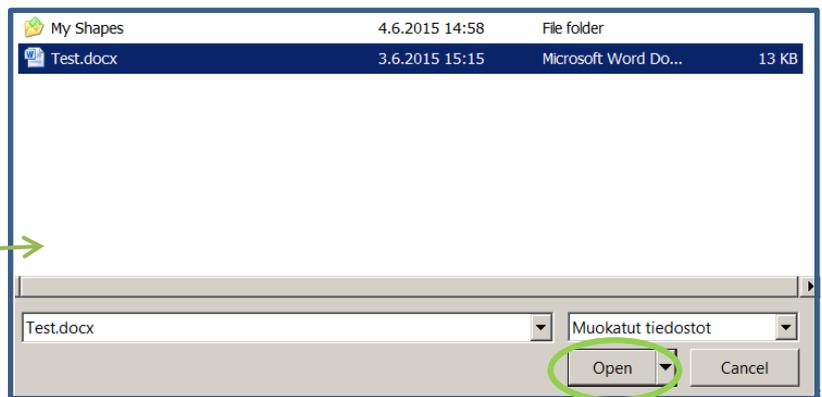
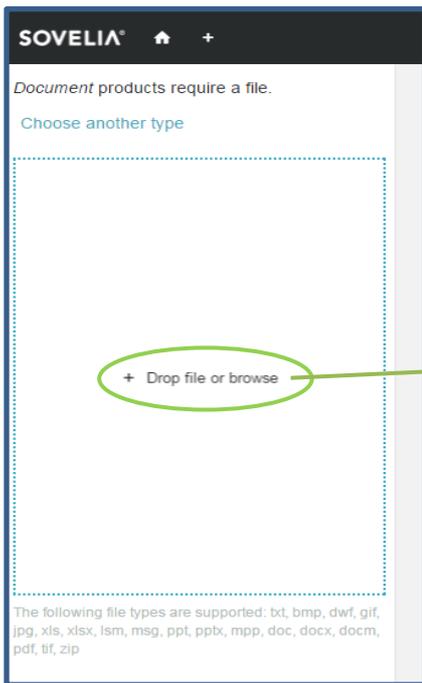
3.1 Saving existing file to system

This functionality is used when you have an existing file stored in your computer or network and want to take it into the system.

Related actions

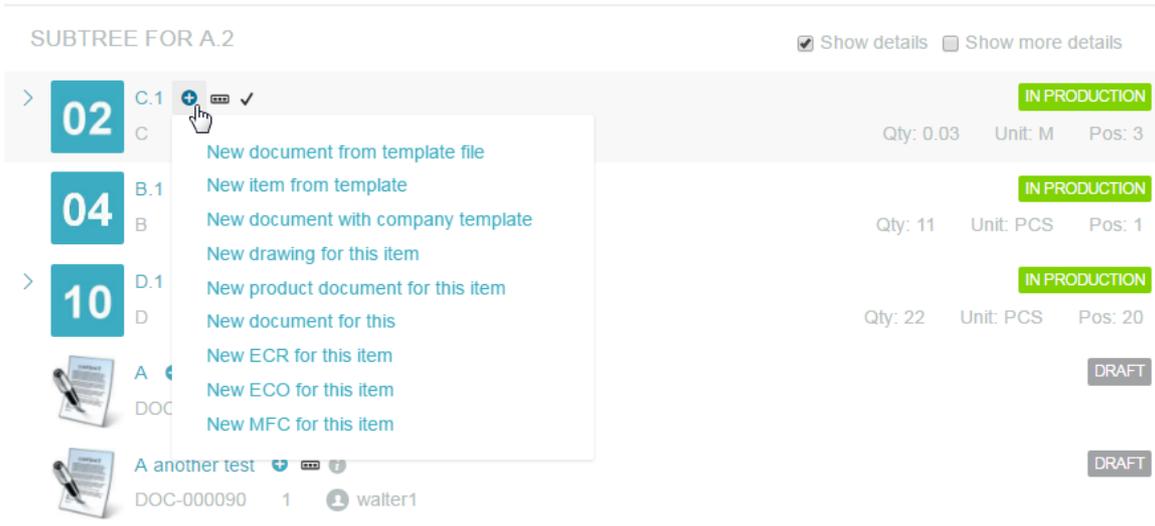


Choose a file either by browsing or by Drag and Drop function for new object and add mandatory and possible additional attributes



3.2 Creating document based on template or existing document

This functionality is used when you want to create a new document based on a template or existing document. This is done by clicking  button in object card or by inserting document straight into subtree by clicking  button (see picture below).



Related actions

	Options vary depending on object type.
New document from template file	Create a new document by using a template.
New document with company template	Create a new document by using a company template.
New drawing for this item	Create a new drawing for selected item.
New product document for this item	Create a new product document for selected item.
New document for this item	Create a new document for selected object.
New ECR for this item	Create a new ECR for selected item.
New ECO for this item	Create a new ECO for selected item.
New MFC for this item	Create a new MFC for selected item.

3.3 Editing document objects

Documents can be modified by replacing the current document revision or by creating a new document revision leaving the old revision as it is. Only one user can modify the document at once. Simultaneous modification is prevented by locking the document object.

Related actions

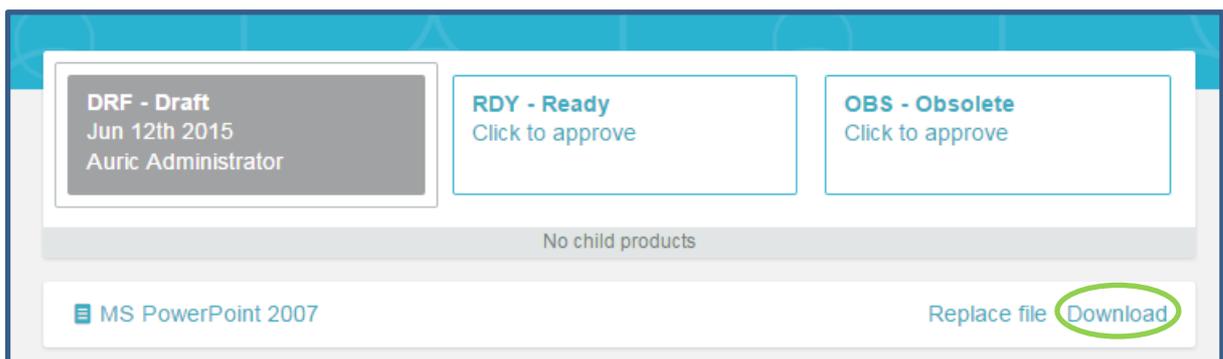


 Edit	Edit current object. Object is locked during editing to prevent simultaneous modification.
 New revision	Create a new revision for selected object.

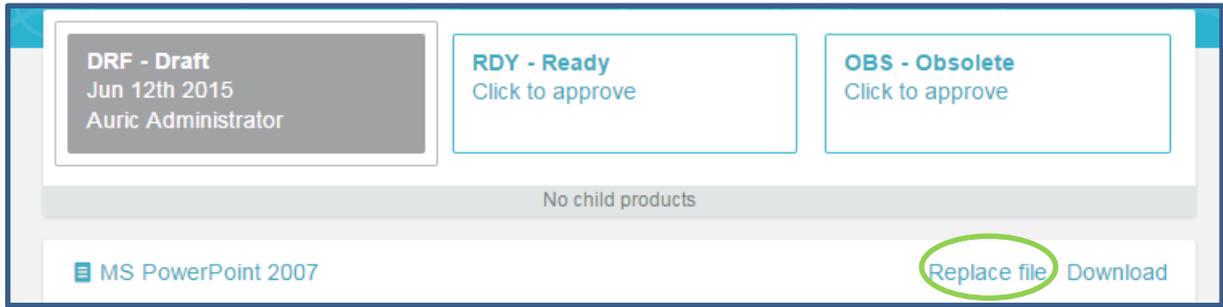
Changes made to the object can be saved by clicking **Save** on the top right.

3.4 Editing document files

- Open document information window
- Download the file by clicking 'Download'



- Open the document, make desired changes and save the file in the editor
- Return to Sovelia document info window
- Choose 'Replace file'



- Select the modified file or drag and drop it into the window
- Click 'Save'

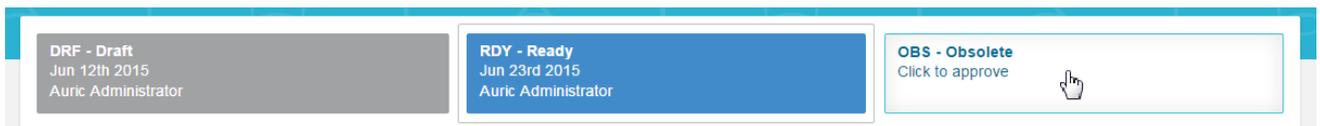
3.5 Approving documents

Related actions

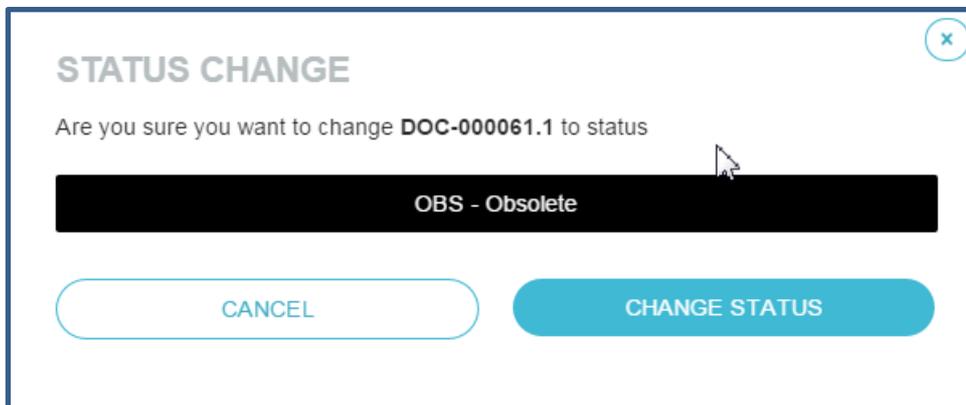


Opens the status selection window. The next state is preselected. Confirm the promote operation by clicking the 'Change status' button.

You can also click the status bars under the thumbnail in object info window to change object status:



Confirmation window opens:



Demoting

Demoting an object can be done by choosing a lower status bar in the object information window.

The demote operation is allowed in exceptional cases and is not needed in daily use.

Stamping

Sovelia supports a feature where PDF-files for objects, which are not in “In production”- status or higher, are stamped with a text: “**NOT APPROVED FOR PRODUCTION**”. Also objects in “Obsolete” -status are stamped with a text: “**OBSOLETE**”.