

Document Control System



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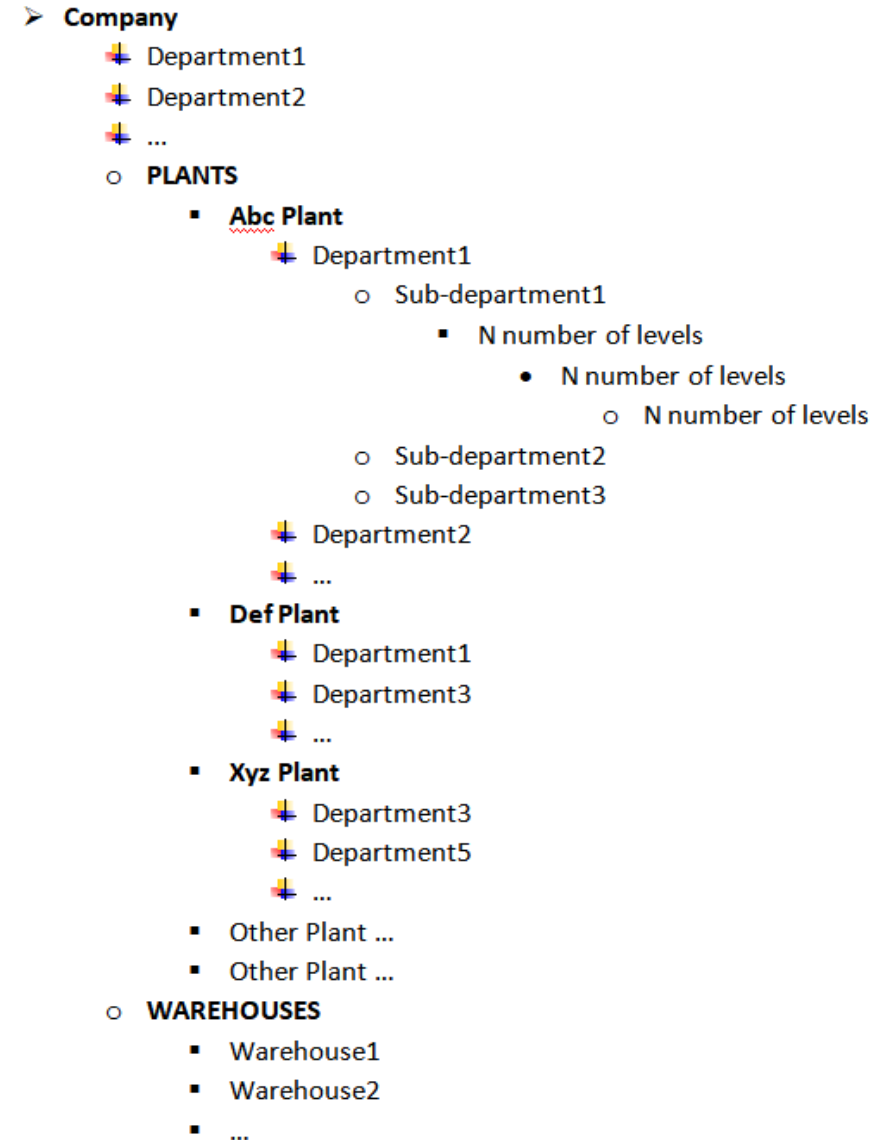
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Software Summary & Objectives

- ✓ Central accessibility of all Quality (and other) documents throughout the organization.
- ✓ Secure deployment of documents.
- ✓ Document Categories as per organizational enterprise structure.
- ✓ Dynamic enterprise structure with scope for future modifications.
- ✓ Enterprise wide access control.
- ✓ Document Versioning and Change/Revision maintenance and tracking.
- ✓ Approval Workflow for changes/revisions.
- ✓ Document draft facility.
- ✓ Document dependency and respective notifications.
- ✓ Automatic notifications for new versions to appropriate users.
- ✓ Automatic revision reminders to contributors.
- ✓ Automatic “Uncontrolled Copy” stamp on every print.
- ✓ Only authorized users can print documents with “Controlled Copy & Date-time & Username” stamp.
- ✓ Authorized users can issue documents to other users and these users will get automatic notification when new version of such a document is released.

Enterprise Structure Categories

A sample list depicting the hierarchical enterprise structure that can be configured within the software is provided below. This is just an example structure. System will have dynamic facility to manage the enterprise structure in such a way that in future, any number of Departments/Categories can be added/removed/modified thereby.



Software Terminology & Features

- ✓ Category Structure Tree
- ✓ Creator
- ✓ Approver
- ✓ Releaser
- ✓ Document Type
- ✓ System User
- ✓ Document
- ✓ Document Version History
- ✓ Document Dependency

Software Terminology & Features

1. Category Structure Tree

- View Category Hierarchical Tree.
- Create New Category, Add sub category.
- View Category Details & permissions.
- Edit & Update Category Details.
- Multiple Documents may be defined at each category and one document may be mapped with multiple categories..

2. Document Type

- Add New Document Type, View Document Type Details.
- Edit & Update Document Type Master.
- Admin can manage all varieties of document types are per company standards and policies.

3. Creator

- Each category will have a set of one or more Creators who have access to create/modify documents within the category.
- Creators have access to original copy of the documents.
- Add Creators to a category, View Creators of a category.
- Remove a Creator from a category.
- One Employee may have creator rights for one or more categories as well.
- One category may have one or more Creators.

Software Terminology & Features

4. Approver

- Each category will have one Approver (Reviewer) at a time - who has rights to approve (review) newly created versions of documents within the category.
- Approver (Reviewer) preferably belongs to Quality department who reviews the created documents.
- Add Approver to a category, View Approvers.
- Remove an Approver from a category.
- One Employee may have Approver rights to multiple categories.

5. Releaser

- Each category will have one Releaser at a time - who has rights to release newly approved versions of documents within the category.

- Releaser may belong to Quality department or the respective department manager who tracks the new documents that are released.
- Add Releaser to a category, View Releasers.
- Remove a Releaser from a category.
- One Employee may have Releaser rights to multiple categories.

6. System User

- Import/Export Users.
- Register New User.
- Search Users, View User Details.
- Edit & Update User Details.

Software Terminology & Features

7. Document

- Create New Documents, View Document Details.
- Update Document by creating a new Version on every change.
- Any document can be deactivated at some point of time.
- Each Version of a Document can be mapped with more than one Category.

8. Document Version History

- Each Document may have multiple versions.
- Any particular version may be mapped with multiple categories within the enterprise structure.
- System maintains audit log of Creation, Approval, and Release of each version of documents.

- System automatically displays Latest version of every document to end users.

9. Document Dependency

- Similar to business processes, Documents in an organization are also largely dependent on other documents within the organization.
- One Document may be dependent on one or more documents.
- More than one Document may be dependent on one document.
- System generates a dependency tree for each document.

Approval Workflow

- ✓ **Document (change/version) Submission >> Approval/Review & Release**
- ✓ Add Version >> Submit >> Approve >> Release
- ✓ Once a Document is selected for updating by any “Creator”, system will automatically suggest hierarchical list of dependent documents which can be reviewed from the system before releasing the changes.
- ✓ Creator will draft a Document Version/Change, pending submission.
- ✓ Once a Document Change is submitted by any “Creator”, it will be notified to the respective “Approver” for review via email workflow notification.
- ✓ On confirmation of “Approver”, Document Change is assigned to the applicable “Releaser”.
- ✓ On final Release by “Releaser”, Document change is automatically published and the new version of the Document will be available to all users throughout the enterprise.
- ✓ Document will be assigned to multiple categories as per applicability.

User Access Roles

1. System Admin

- ✓ Manage Enterprise Structure & all Categories
- ✓ Manage Plants & Department Categories
- ✓ Enterprise wide User Access Rights
- ✓ Manage Document Dependency Matrix
- ✓ Add/Remove Contributors of all Categories

2. General Staff (View Only)

- ✓ View Enterprise Structure
- ✓ View Category wise Documents (Latest version)
- ✓ Search Documents (Latest version)

3. All Contributors

- ✓ View Document Revisions
- ✓ View Document Dependencies
- ✓ View Previous Versions

4. Creator (Contributors)

- ✓ Create & Submit Document Changes and Revisions
- ✓ Validate Document Dependencies
- ✓ View Document Revisions

5. Approver (Contributors)

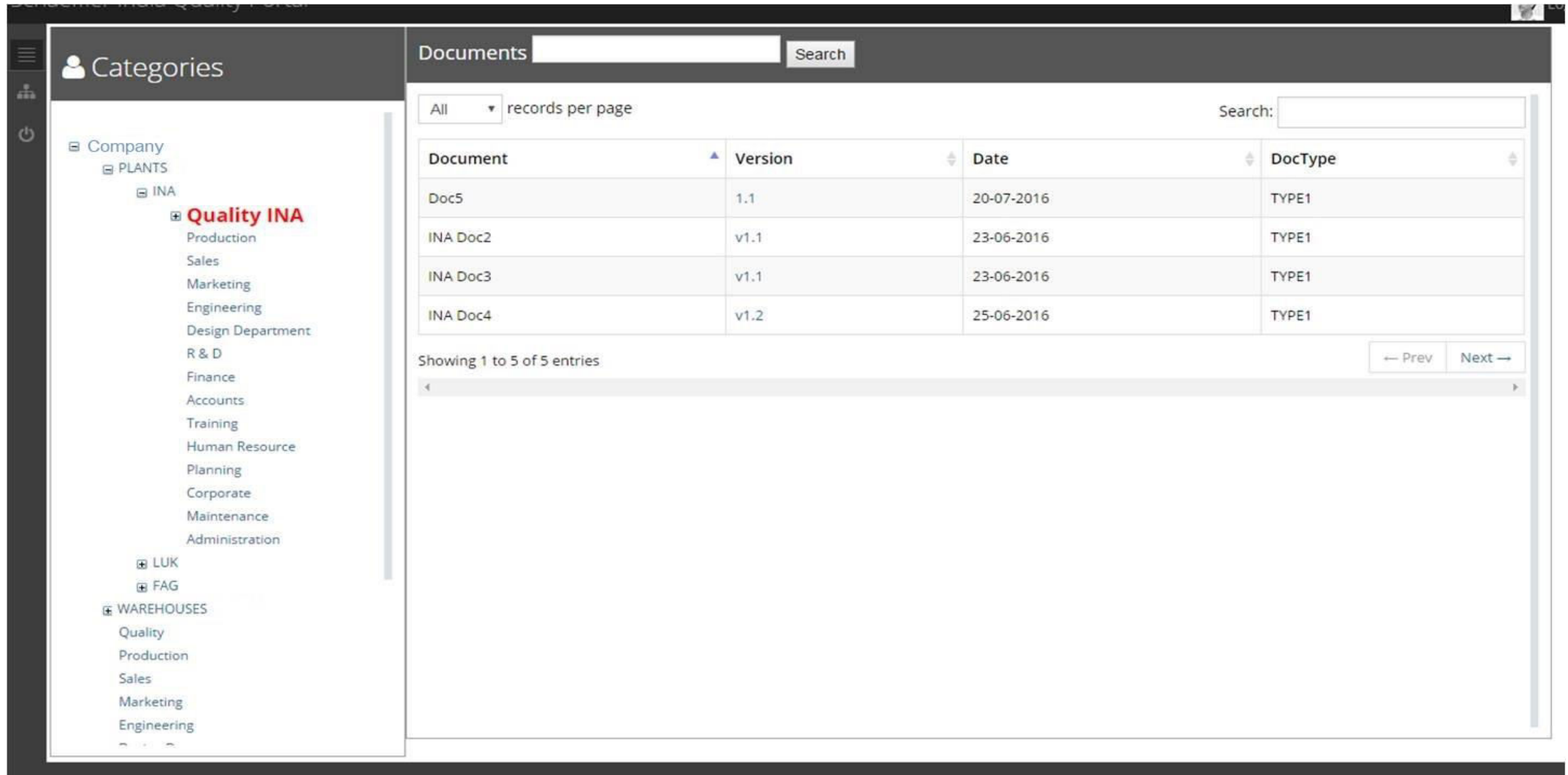
- ✓ Manage all Documents Submitted for Review
- ✓ Review and Approve Submitted Documents

6. Releaser (Contributors)

- ✓ Manage all Approved Documents Submitted for Release
- ✓ Release Approved/Reviewed Documents

End-user Screens

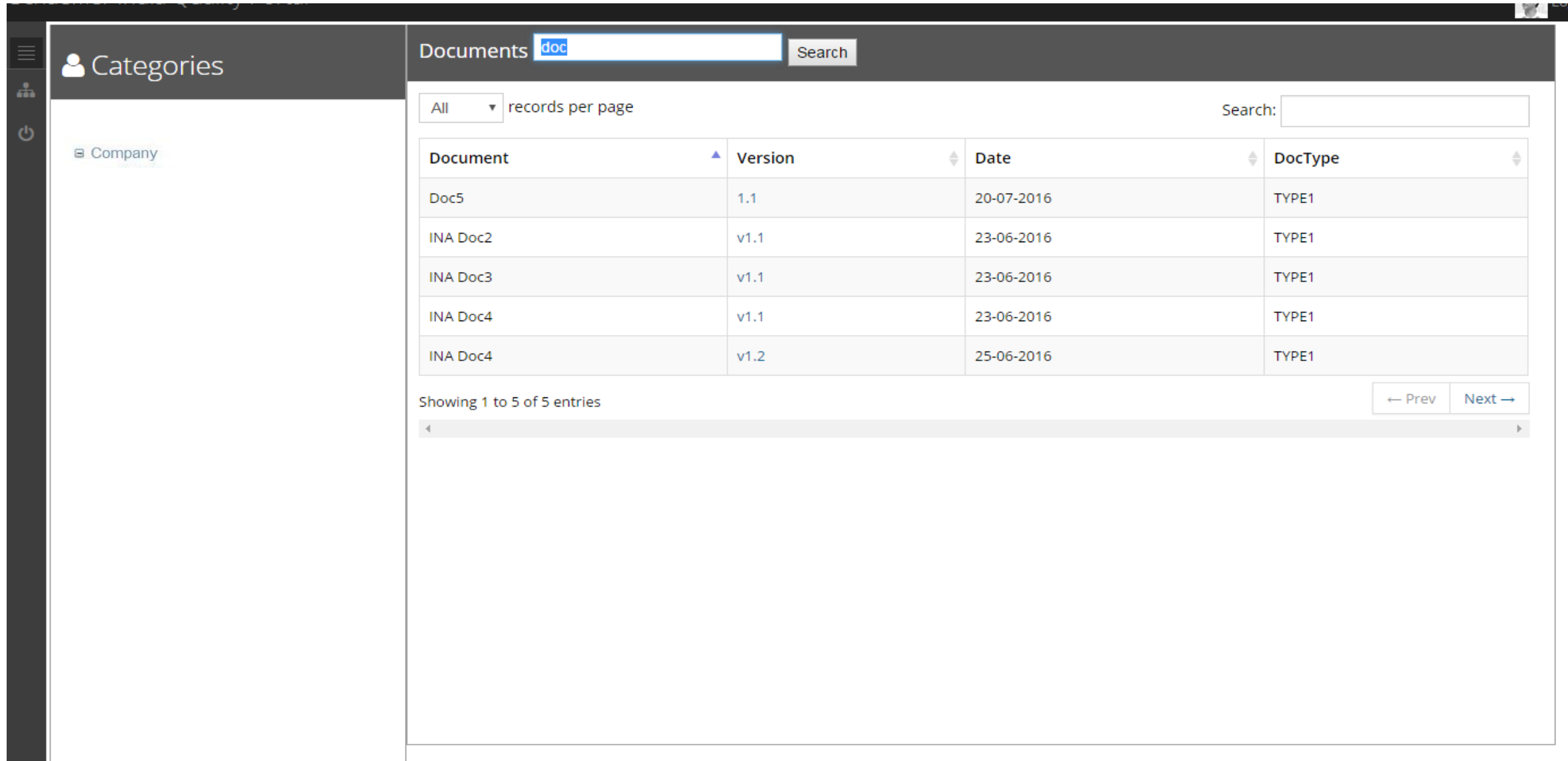
Browse using enterprise structure



The screenshot displays a web-based Document Control System interface. On the left, a 'Categories' sidebar shows a tree structure under 'Company'. The 'INA' category is expanded, with 'Quality INA' highlighted in red. Other categories include 'PLANTS', 'LUK', 'FAG', and 'WAREHOUSES'. The main area, titled 'Documents', features a search bar and a table of document records. The table has columns for Document, Version, Date, and DocType. Below the table, it indicates 'Showing 1 to 5 of 5 entries' and includes 'Prev' and 'Next' navigation buttons.

Document	Version	Date	DocType
Doc5	1.1	20-07-2016	TYPE1
INA Doc2	v1.1	23-06-2016	TYPE1
INA Doc3	v1.1	23-06-2016	TYPE1
INA Doc4	v1.2	25-06-2016	TYPE1

Document Search Facility



The screenshot displays a web application interface for a Document Control System. On the left, a sidebar shows a 'Categories' menu with a 'Company' item. The main area is titled 'Documents' and features a search bar containing the text 'doc' and a 'Search' button. Below the search bar, there is a dropdown menu set to 'All' and a label 'records per page'. A search input field is also present. The search results are presented in a table with the following data:

Document	Version	Date	DocType
Doc5	1.1	20-07-2016	TYPE1
INA Doc2	v1.1	23-06-2016	TYPE1
INA Doc3	v1.1	23-06-2016	TYPE1
INA Doc4	v1.1	23-06-2016	TYPE1
INA Doc4	v1.2	25-06-2016	TYPE1

Below the table, it indicates 'Showing 1 to 5 of 5 entries' and provides navigation buttons for '← Prev' and 'Next →'. A horizontal scrollbar is visible at the bottom of the table area.

Admin Screens

Category Configurations

Categories

- Company
 - PLANTS
 - INA
 - Quality INA**
 - Production
 - Sales
 - Marketing
 - Engineering
 - Design Department
 - R & D
 - Finance
 - Accounts
 - Training
 - Human Resource
 - Planning
 - Corporate
 - Maintenance
 - Administration
 - LUK
 - FAG
 - WAREHOUSES
 - Quality
 - Production
 - Sales
 - ...

General Search

Category Details

Category Name:

Parent Category:

Category Code:

Contributors

User	Role	
Staff1 asdf	CREATE	<input type="button" value="Remove"/>
Staff2 asdf	APPROVE	<input type="button" value="Remove"/>
Staff3 asdf	RELEASE	<input type="button" value="Remove"/>
0--NONE--	CREATE	<input type="button" value="Add"/>

Documents

All records per page Search:

Active	Document	Version	Date	DocType	Actions
Yes	INA Doc2	v1.1	23-06-2016	TYPE1	
Yes	INA Doc3	v1.1	23-06-2016	TYPE1	
Yes	INA Doc4	v1.1	23-06-2016	TYPE1	
Yes	INA Doc4	v1.2	23-06-2016	TYPE1	

Showing 1 to 4 of 4 entries

Prev Next

Document Dependencies

Document

Doc Code: INA Doc3

Title: INA Doc3

Doc Type: PRC

Description: INA Doc3

Created By: Staff1 asdf

Creation Date: 23-06-2016

Category: PLANTS > INA > Quality INA

Is Active:

Dependent Docs

INA Doc4

Depends On Docs

All Documents that are Dependent on this document

All Documents that this document Depends on

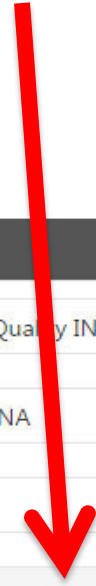
Versions

All records per page

Version	Date	Created	Reviewed	Approved	Status	Actions
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Contributors Screens

Add New Document



- INA
 - Quality INA**
 - Quality Sub Category1
 - Production
 - Sales
 - Marketing
 - Engineering
 - Design Department
 - R & D
 - Finance
 - Accounts
 - Training
 - Human Resource
 - Planning
 - Corporate
 - Maintenance
 - Administration
 - LUK
 - Quality LUK
 - Production
 - Sales
 - Marketing
 - Engineering
 - Design Department
 - ...

Category Details

Category Name	<input type="text" value="Quality INA"/>
Parent Category	<input type="text" value="INA"/>
Category Code	<input type="text"/>

[Add Document](#)

Contributors

User	Role	
Staff1 asdf	CREATE	
Staff2 asdf	REVIEW	
Staff3 asdf	APPROVE	

Documents

All records per page Search:

Active	Document	Version	Date	DocType	Actions
Yes	INA Doc2	v1.1	23-06-2016	TYPE1	
Yes	INA Doc3	v1.1	23-06-2016	TYPE1	
Yes	INA Doc4	v1.1	23-06-2016	TYPE1	
Yes	INA Doc4	v1.2	25-06-2016	TYPE1	

Showing 1 to 4 of 4 entries

New Document Added

Document

Doc Code:

Title:

Doc Type:

Description:

Created By:

Creation Date:

Is Active:

Dependent Docs

Doc Code	Title	Doc Type	Description	Created By	Creation Date	Is Active
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Depends On Docs

Doc Code	Title	Doc Type	Description	Created By	Creation Date	Is Active
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Versions

[Add Version](#)

All records per page

Active	Version	Date	Created	Reviewed	Approved	Status	Actions
Yes	1.1	20-07-2016	Staff1 asdf [20-07-2016]	Staff2 asdf [PENDING]	Staff3 asdf [PENDING]	CREATED	EDIT

Document Versions & Categories

The screenshot displays two main sections: "Versions" and "Selected Categories".

Versions Section:

- Header: Versions [Add Version](#)
- Filter: All records per page
- Table:

Active	Version	Date	Created	Reviewed	Approved	Status	Actions
Yes	1.1	20-07-2016	Staff1 asdf [20-07-2016]	Staff2 asdf [PENDING]	Staff3 asdf [PENDING]	CREATED	EDIT

Showing 1 to 1 of 1 entries

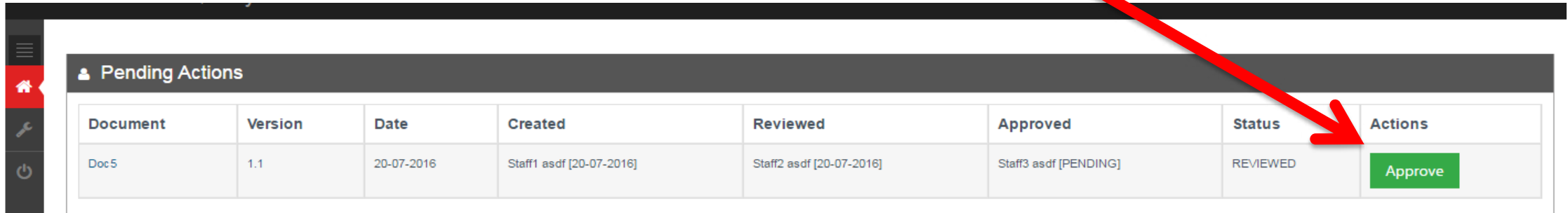
Selected Categories Section:

- Header: Selected Categories
- Filter: All records per page
- Search:
- Form: Schaeffler India > Accounts | 1.1 | [Add](#)
- Table:

Category	Version	Assigned By	Distribution Date	Actions
Schaeffler India > Schaeffler PLANTS > INA > Quality INA	1.1	Staff1 asdf	20-07-2016 <input checked="" type="checkbox"/>	X

Showing 1 to 1 of 1 entries

Review & Approval Process

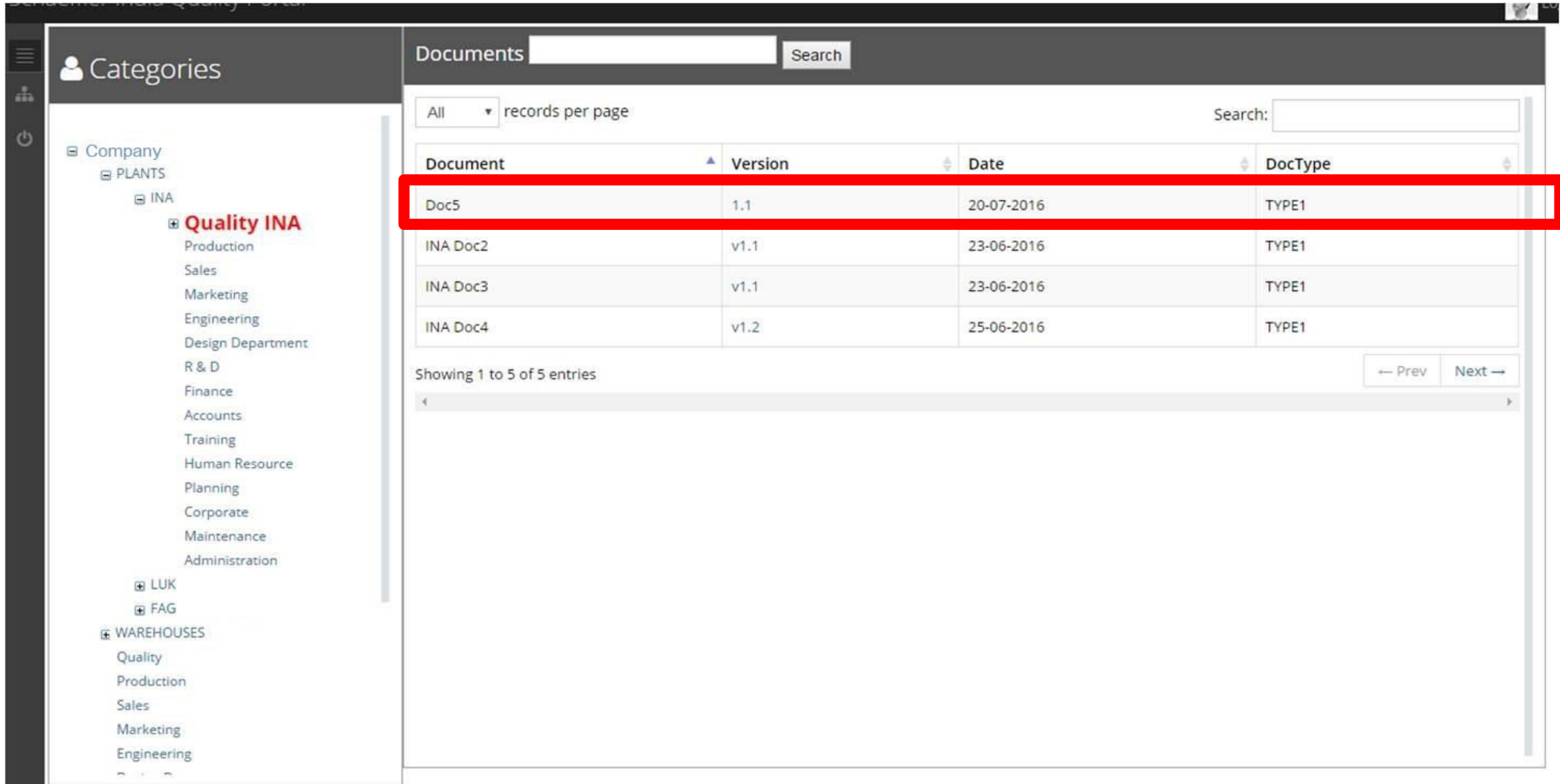


The screenshot shows a 'Pending Actions' dashboard with a table containing one row of data. The table has columns for Document, Version, Date, Created, Reviewed, Approved, Status, and Actions. The 'Status' column contains the text 'REVIEWED', and the 'Actions' column contains a green 'Approve' button. A red arrow points from the title 'Review & Approval Process' to the 'Approve' button.

Document	Version	Date	Created	Reviewed	Approved	Status	Actions
Doc5	1.1	20-07-2016	Staff1 asdf [20-07-2016]	Staff2 asdf [20-07-2016]	Staff3 asdf [PENDING]	REVIEWED	Approve

Approver Dashboard

Document Published



The screenshot displays a web application interface for a Document Control System. On the left, there is a 'Categories' sidebar with a tree view showing a hierarchy: Company > PLANTS > INA > Quality INA. The 'Quality INA' folder is expanded and highlighted in red. Below it are sub-categories like Production, Sales, Marketing, Engineering, Design Department, R & D, Finance, Accounts, Training, Human Resource, Planning, Corporate, Maintenance, and Administration. Further down are LUK and FAG, and at the bottom, WAREHOUSES with sub-categories Quality, Production, Sales, Marketing, and Engineering.

The main area is titled 'Documents' and contains a search bar and a table. The table has columns for Document, Version, Date, and DocType. The first row, 'Doc5', is highlighted with a red border. Below the table, it says 'Showing 1 to 5 of 5 entries' and has navigation buttons for 'Prev' and 'Next'.

Document	Version	Date	DocType
Doc5	1.1	20-07-2016	TYPE1
INA Doc2	v1.1	23-06-2016	TYPE1
INA Doc3	v1.1	23-06-2016	TYPE1
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Thank You



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