

<b>Work Instruction Add a document to Relatics</b>				Project:
Function:	Doc No:	Doc Sheet:	Doc. Rev.:	Page:
000		1		1 (7)
Doc Class:	Created By:	Created Date:	Changed By:	Changed Date:
	Erica Cacciuolo	28-03-2023		

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## Revision History

Revision	Date	By	Remarks
a	28-03-2023	EC	

# 1 GENERAL

## 1.1 OBJECTIVE

There is a module 'Documents'. This module can be used to keep all important project documents together in one place.

## 1.2 ADDED VALUE

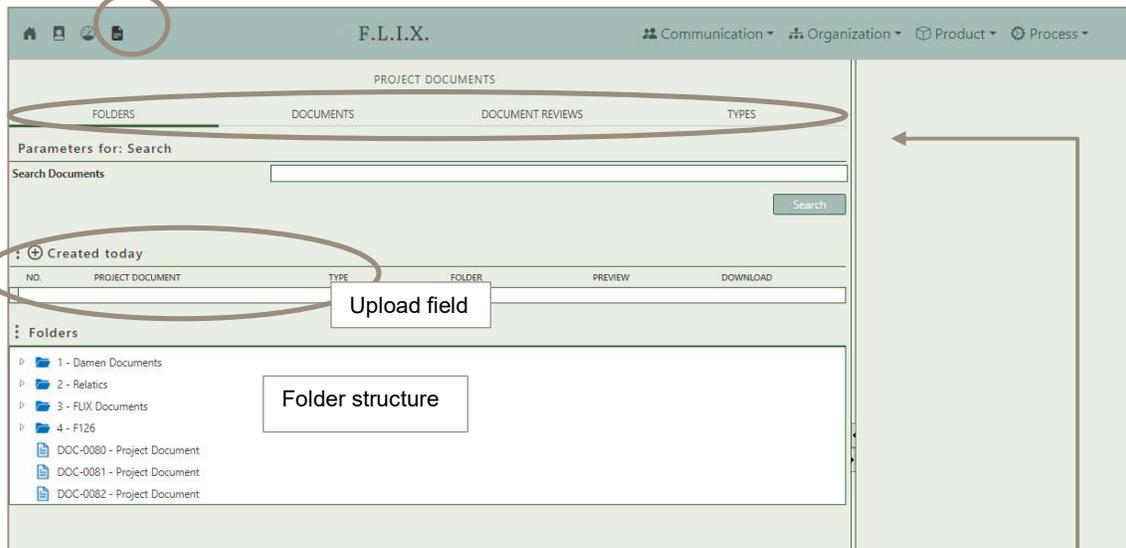
But in addition, you can link those imported documents, to meetings, actions, requirements, decisions, you name it. So you can have your documents centered in one place, as well as link them to the topics they are related to.

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## 2 UPLOAD A DOCUMENT

### 2.1 OVERVIEW

Go to -> Documents



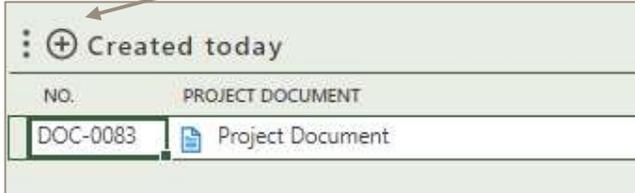
On the left side you will see a few tabs, we will come to that later.

There is also a search parameter where you can search for a specific document.

You can see the different folders under which you can arrange your documents and the document upload field itself.

2.1.1 UPLOAD

To upload a document click on  in the upload field:



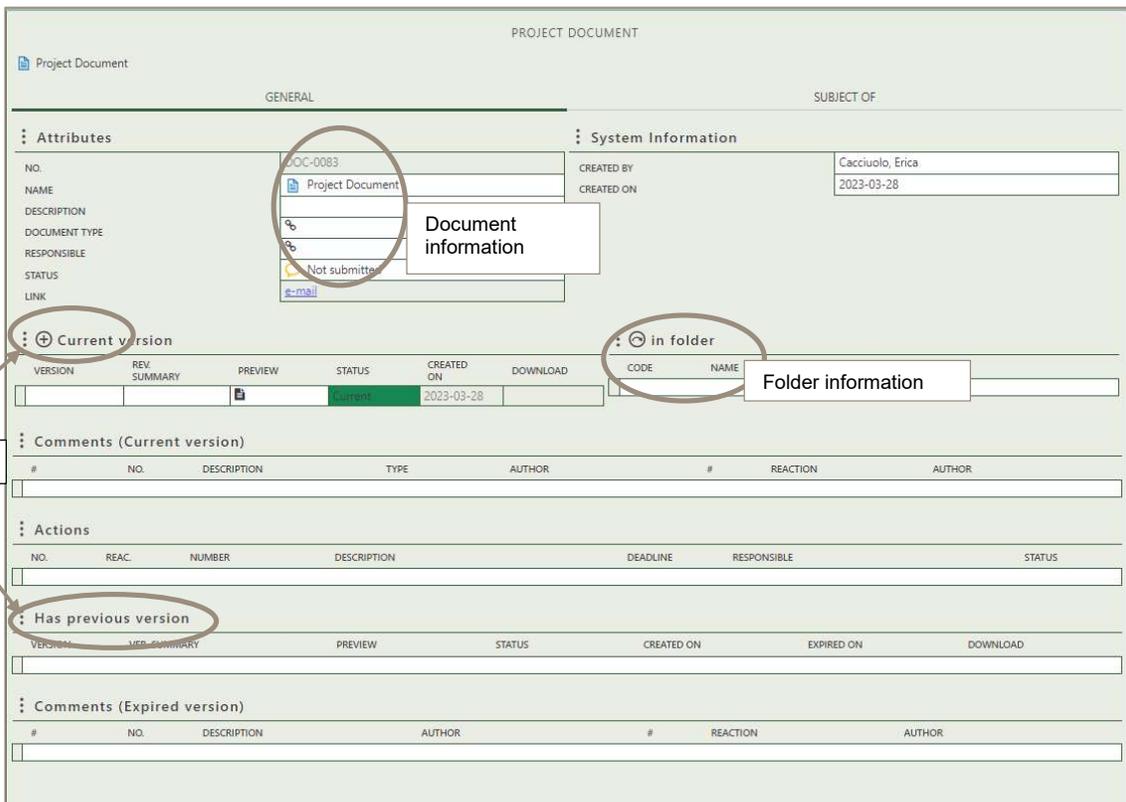
Created today	
NO.	PROJECT DOCUMENT
DOC-0083	 Project Document

An empty row will open in your table



Created today					
NO.	PROJECT DOCUMENT	TYPE	FOLDER	PREVIEW	DOWNLOAD
DOC-0083	 Project Document				
Folders					

Click on project document and the detailed page will open on the right side of your screen.



**PROJECT DOCUMENT**

Project Document

GENERAL SUBJECT OF

**Attributes**

NO. DOC-0083  
 NAME Project Document  
 DESCRIPTION  
 DOCUMENT TYPE  
 RESPONSIBLE  
 STATUS Not submitted  
 LINK 

**System Information**

CREATED BY Cacciolo, Erica  
 CREATED ON 2023-03-28

**Current version**

VERSION	REV. SUMMARY	PREVIEW	STATUS	CREATED ON	DOWNLOAD	CODE	NAME
			Current	2023-03-28			

**Comments (Current version)**

#	NO.	DESCRIPTION	TYPE	AUTHOR	#	REACTION	AUTHOR

**Actions**

NO.	REAC.	NUMBER	DESCRIPTION	DEADLINE	RESPONSIBLE	STATUS

**Has previous version**

VERSION	REV. SUMMARY	PREVIEW	STATUS	CREATED ON	EXPIRED ON	DOWNLOAD

**Comments (Expired version)**

#	NO.	DESCRIPTION	AUTHOR	#	REACTION	AUTHOR

Version info

Document information

Folder information

Fill in as much as you can, the more info you fill in, the easier it gets to find it back in a later stadium.

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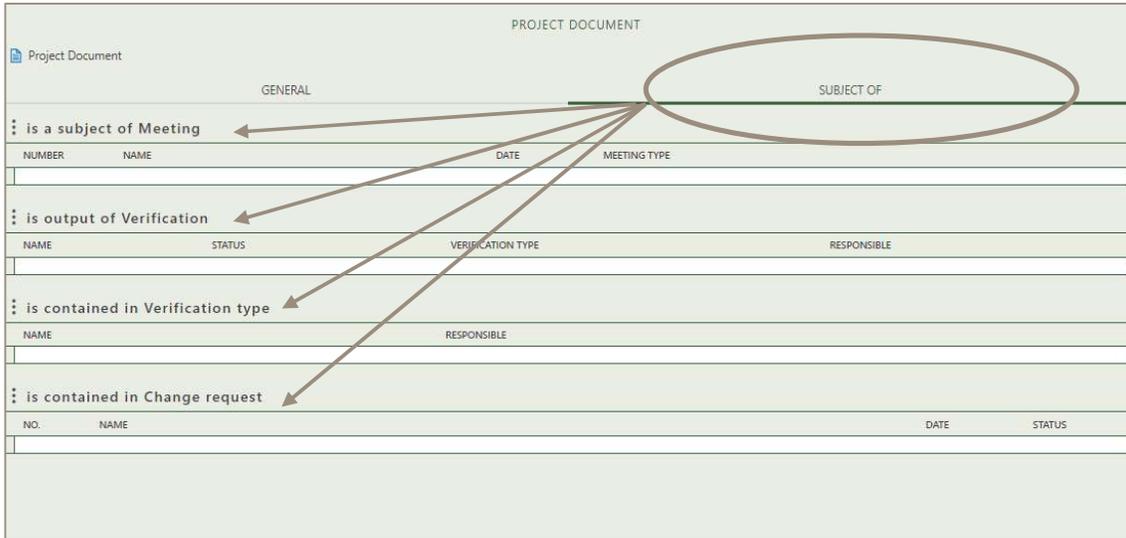
When all info is filled in, it is time to import your document

The screenshot shows a 'GENERAL' tab in a software interface. It features an 'Attributes' section with fields for NO. (DOC-0083), NAME (Project Document), DESCRIPTION, DOCUMENT TYPE, RESPONSIBLE, STATUS (Not submitted), and LINK (e-mail). Below this is a 'Current version' section with a table. The table has columns for VERSION, REV. SUMMARY, PREVIEW, STATUS, CREATED ON, and DOWNLOAD. The first row shows a version with a '[select file]' button in the PREVIEW column, a 'Current' status, and a creation date of 2023-03-28. An arrow points from the text above to the '[select file]' button.

VERSION	REV. SUMMARY	PREVIEW	STATUS	CREATED ON	DOWNLOAD
		[select file]	Current	2023-03-28	

Double click on Preview – Click on the icon and you will be able to select your document from your computer.

2.1.2 SUBJECT OF



This is the second tab on your detail page. This tab is solely for reference purpose.

Here you can see if your document has been linked to a meeting, verification or change request.

If you want to add a document to these modules, you will need to go to those modules themselves to link them.

You can also upload a document via those modules, but make sure you fill in as much information as possible and also the folder you want them in order to be able to find those documents via the document module.

2.2 DOCUMENTS

PROJECT DOCUMENTS					
FOLDERS	DOCUMENTS		DOCUMENT REVIEWS	TYPES	
Project Documents					
Document type	NO.	NAME	DESCRIPTION	DOCUMENT TYPE	PREVIEW
<ul style="list-style-type: none"> <li>Plan (25)</li> <li>Presentation (19)</li> <li>Template (11)</li> <li>Work Instruction (5)</li> <li>UML Diagram (3)</li> <li>Show more items »</li> <li>Show sub-</li> </ul>	DOC-0002	+ Add item script		Javascript coding	ADD_agenda_item_script.docx
	DOC-0003	+ ALL - RM trainingen		Training	_Filedrop_.zip
	DOC-0004	+ Aspect Analysis report		Template	Aspect_Analysis_Report_Template_rev05_20210127.docx
	DOC-0005	+ Aspect Management plan template		Template	Aspect_Management_Plan_Template_rev05_20210127.docx
	DOC-0006	+ Aspect Management training		Presentation	AMP_AR_training.pdf

Here you will find all documents listed.

### 2.3 DOCUMENT REVIEW

For the document review list and status, go to tab nr. 3

PROJECT DOCUMENTS						
FOLDERS		DOCUMENTS		DOCUMENT REVIEWS		TYPES
Document reviews						
NO.	PROJECT DOCUMENT	PERSON	CURRENT VERSION	STATUS	FOLDER	
DOC-0005	Aspect Management plan template		Aspect Management Plan Template_rev05_20210127.docx	Submitted	Templates	
DOC-0008	Configuration Mgt		F126-DN-9-E674.900-A-MP CONFIGURATION MANAGEMENT.docx	Submitted	Proces Management Plans	
DOC-0070	Relatics DTAP on premis		Proces update PiM.pdf	Submitted	Relatics	
Displaying items 1 to 3 of 3						

You'll see the status of the review, the documents themselves and the folder they are stored in.

### 2.4 TYPES

PROJECT DOCUMENTS						
FOLDERS		DOCUMENTS		DOCUMENT REVIEWS		TYPES
Document types			Comment type			
doc1	Create	DESCRIPTION	COMMENT TYPE	DESCRIPTION		
	FLIX Instruction		Contract comment			
	Handbook		Technical comment			
	Javascript coding		Textual comment			
	Plan					
	Presentation					
	Stylevision					
	Template					
	Training					
	UML Diagram					
	Work instruction					

All types used in this module are listed here. And if you miss one, you can also create one. Just click on create and enter the name of the type you need.