Manage Documents Required

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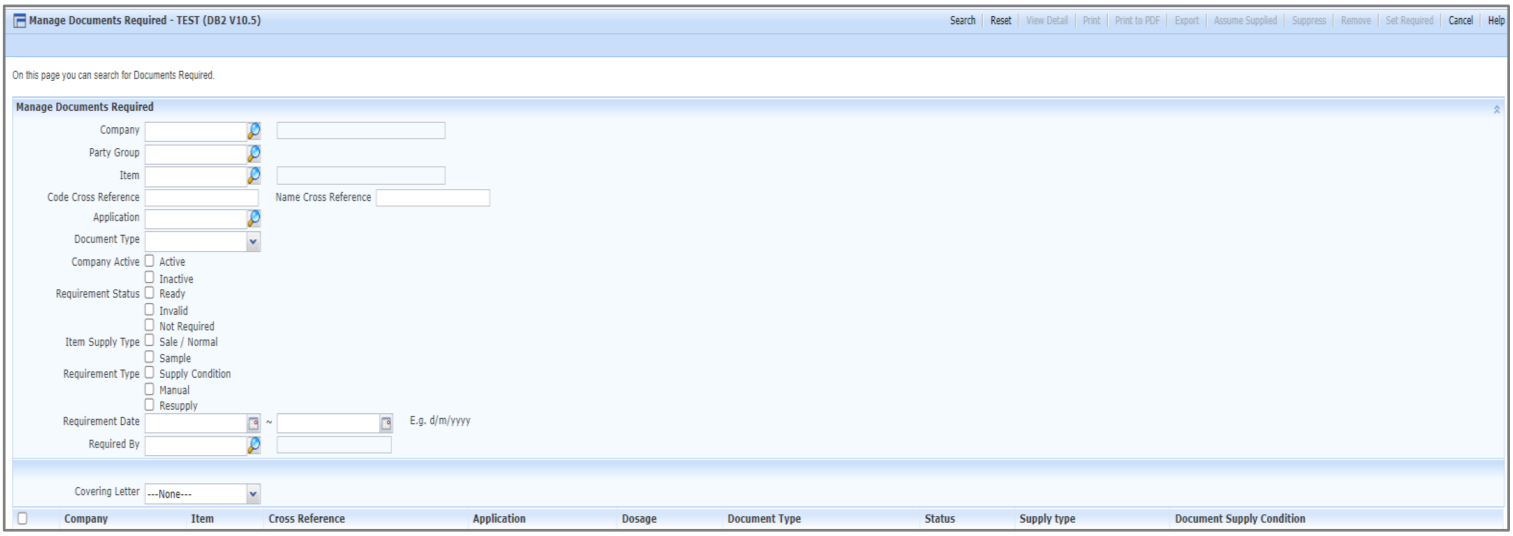
Documents include Safety Data Sheets, Certificates and Specifications which contain business information which is required to be kept up to date and passed on to customers.

Formpak automatically creates new versions of previously created documents. Documents can be 'required' by manually being triggered by choosing 'Print Later' from Print a Document for an Item.

Requirements of when Documents should be supplied can be managed in Document Supply Conditions

Manage Documents Required allows you to find documents which need to be supplied and re-supplied. You can search by Company, Party Group, Item, Cross Reference, Application, Document Type or combinations of these fields.



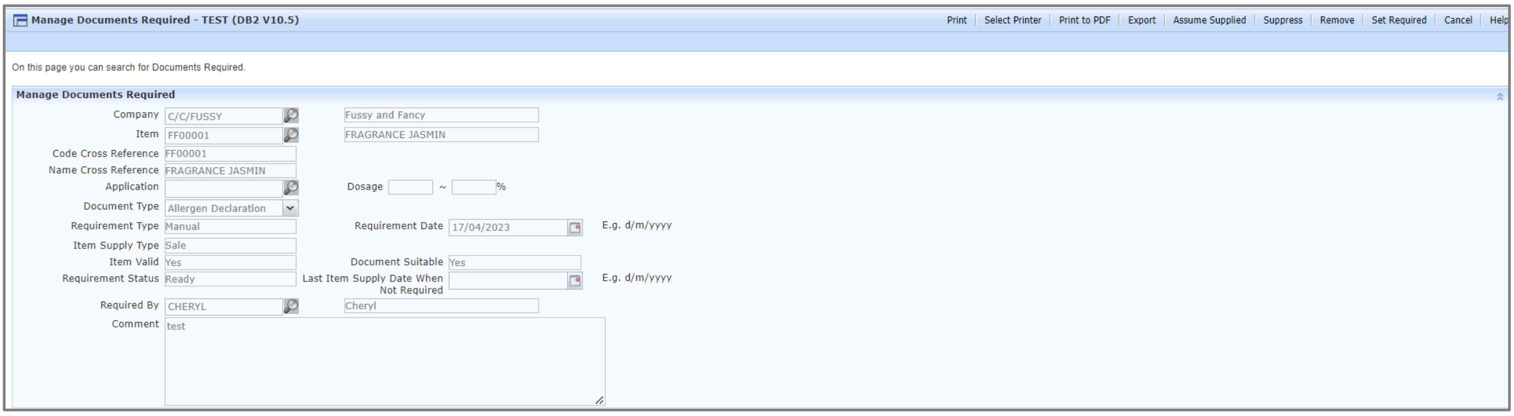
It is also possible to view documents with different Status, e.g. ready or invalid. When you have entered appropriate search conditions, select 'Search' to view results.

The results show a list of documents to be sent. You can select them and perform the following actions:

Search: Selecting the appropriate criteria and selecting Search will display as list of relevant Documents.

Reset: Select Reset and this will remove any search criteria entered.

View Detail: Selecting an Item from the list and selecting View Detail will display the Document Requirements details and any Supply Conditions if applicable.



Print: Prints to a physical printer and logs the 'supply' of the documents to the customer so that the document appears in the Documents Supplied list for the customer.

Print to PDF: Generate PDF files, along with covering letter if required. This also logs the 'supply' of the documents. If multiple documents are selected for Customers/Parties then multiple zip files will be created, each representing one Customer. There is an option to Email Documents note this emails all the document zip files to one recipient.

Assume Supplied: Mark the document 'Supplied' with associated actions, i.e. the document will appear in Documents Supplied list for the Company.

Suppress: Suppress the document from being printed. Note – the system will only trigger the document as required again if the Item is resupplied to the Company.

Remove: Remove the document from the Documents Required list. Note – the system will trigger the document as required again if it fulfils the Document Supply Conditions (as determined during the ongoing assessments of Items, properties and documents supplied).

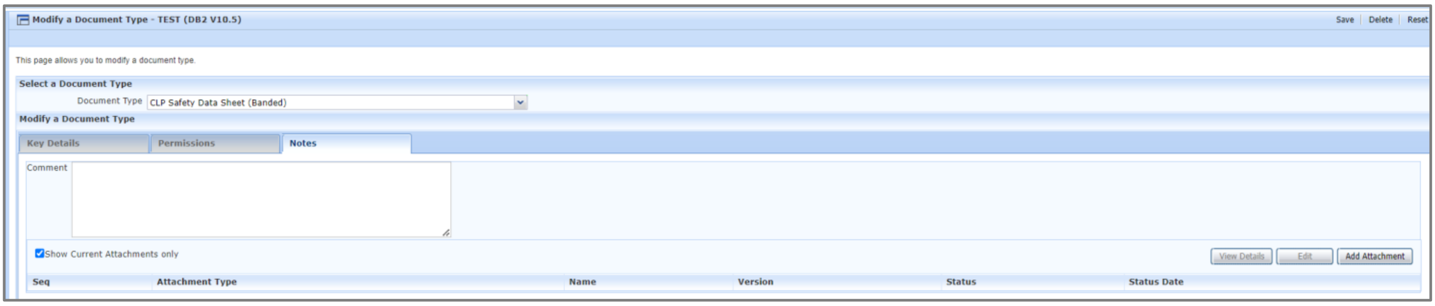
Set Required: Set the Document as 'Required' which shows it needs to be supplied.

Mini Tip

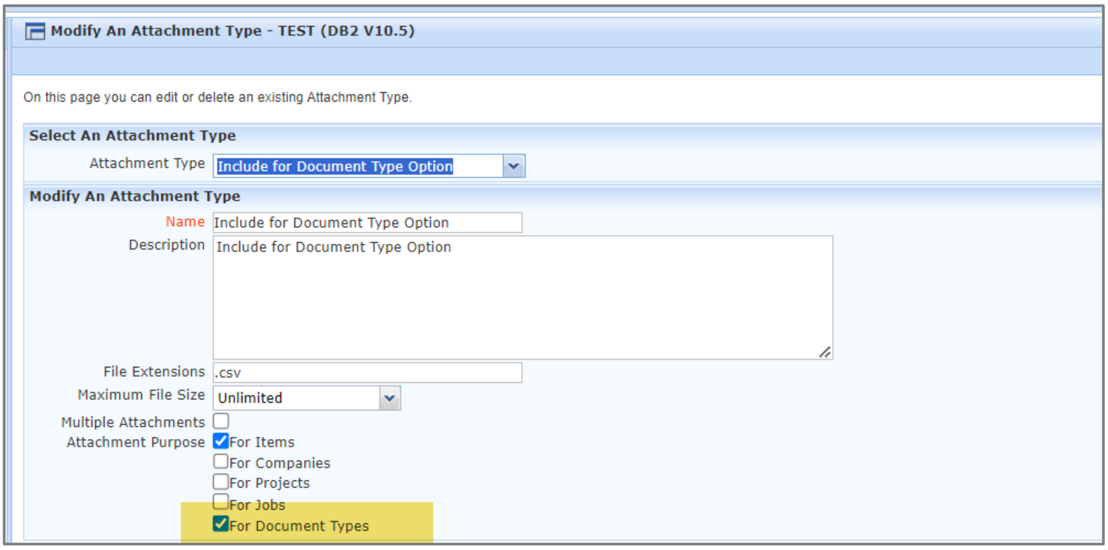
Add Notes and Attachments in Document Types.

Document Types

A tab is available on Document Types called 'Notes' which enables Users to add notes and attachments for each Document Type. For example, Users can add Client guides, and comments about custom documents to assist other Users.



Additionally, in Modify an Attachment Type, there is an option 'For Document Types'. Only attachments that have the 'For Document Type' ticked can be added.



The relevant Operation Permission ‘Modify the Notes of a Document Type’ will need to be enabled. This allows the User to modify the notes and add attachments, but it does not permit changing the Document Type itself.