Document Handling

TM Master 2.655

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Document Handling: What's it For?

Use the *Document Handling* module as your central access and administration point for all your fleet documents. Document Handling allows you to:

- Manually vs. TM Master organized view of your documents structures. (See Getting Started with Document Handling for details.)
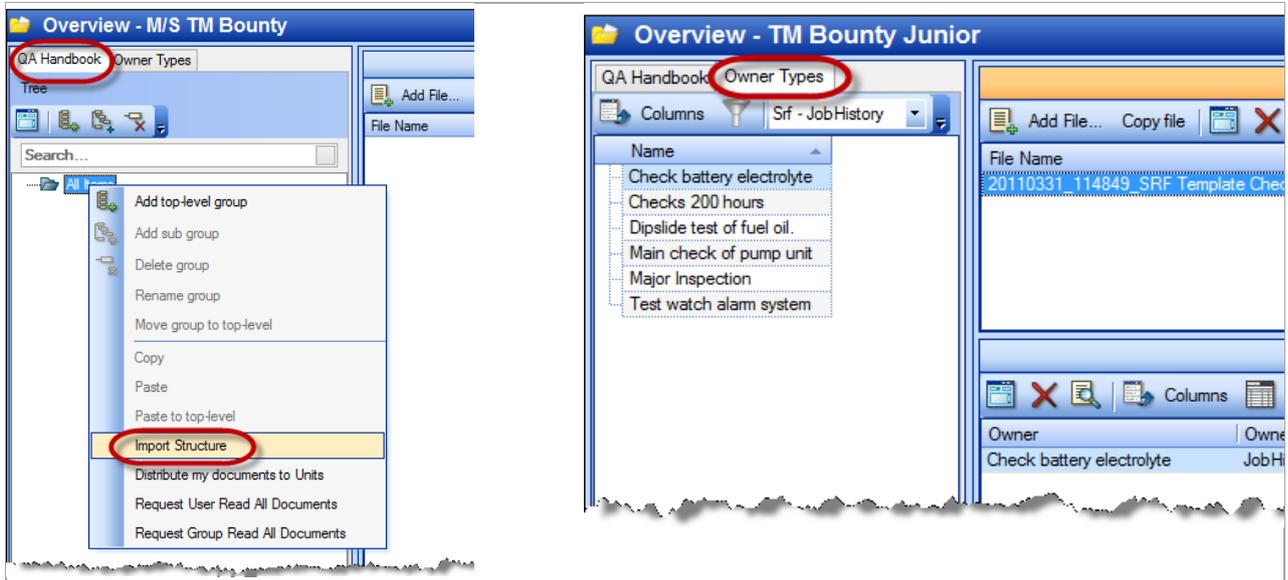
- Overview of documents links conveniently arranged according to which owner type the documents are connected. (See Occurrences for details.)
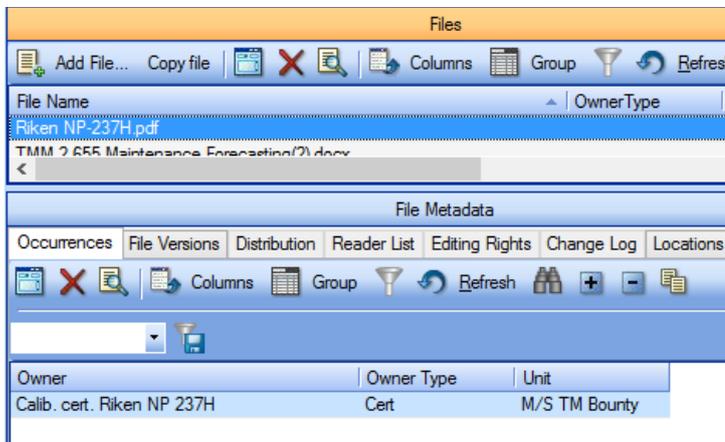
- Granular user rights to documents TM Master: read, edit, delete, and admin. (See Editing right for details.)
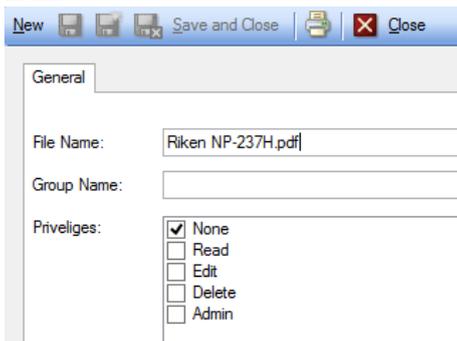
- Easy notification of new comments and read progress control via special buttons "Request read" and "Confirm read". (See Tracking Users Reading Progress: Documentation Administration for details.)

- Distribution of documentation giving the user full control over the availability of individual documents. (See Distribution for details.)
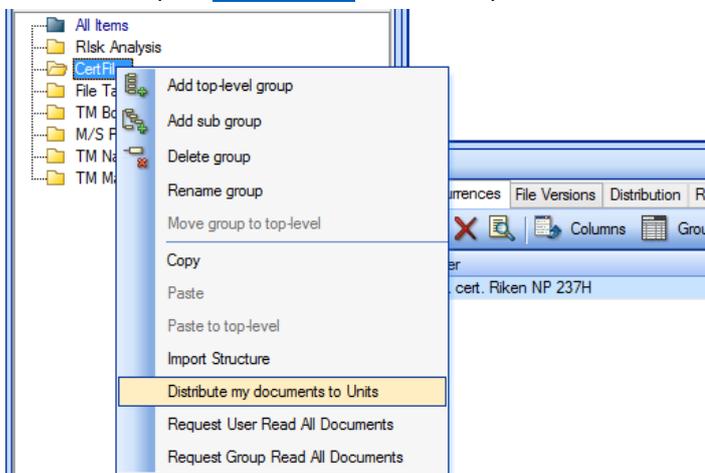
- Individual versioning settings. (See File versions for details.)
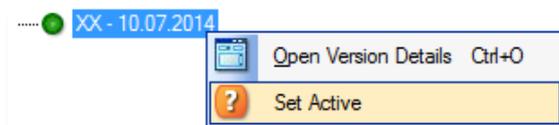
- Each user has their own personal overview of all relevant documents that may require their attention. (See "How-to" for Users Required/Recommended to Read a Document for details.)

Before You Begin: Enable Document Handling

To start using Document Handling, enable the Document Handling feature in your TM Master office installation.

To enable Document Handling:
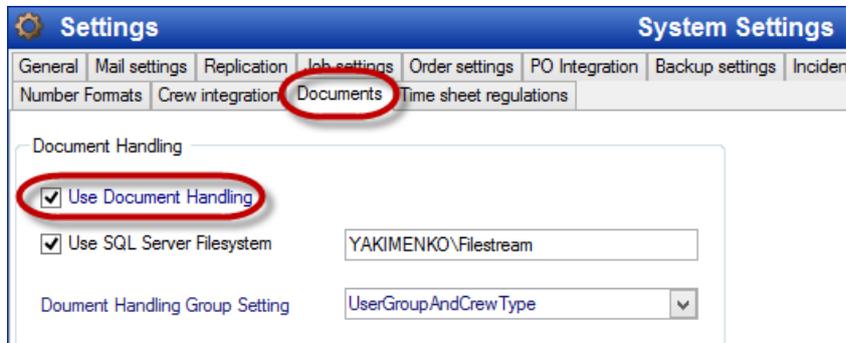
1. Ensure that your environment meets the following requirements:
   a) **Access rights**
      Your account is a member of the "Administrator" group in TM Master. (*To check the user membership, visit the* **Administration** *section*.)
   b) **Office installation vs. ship installation**
      First enable Document Handling in the office installations (*the* **Office Installation** *checkbox is marked on* **System**-> **Settings** -> *the* **General** *tab*), and then replicate this setting to your ship installations.
   c) **License**
      Your license should allow the **Tmv2_DocumentHandling** module. (*Check that* **Tmv2_DocumentHandling** *is enabled in the Module overview list in* **System** -> **Settings**.)
   d) (*If applicable*) **Using the SQL Server Filesystem feature**
      o The SQL Server authentication is enabled on the SQL Server.
      o File location for documents must be on the same computer as the SQL Server.

2. Go **System** -> **Settings**, click the **Documents** tab and check the **Use Document Handling** checkbox.

3. Define how the system should handle File UserRights for groups in the Document handling groups Setting:
   - **UserGroupAndCrewType** both group types should be available for use in the system;
   - **UserGroup** group types should be available for use in the system;
   - **CrewType** crew types should be available for use in the system.

4. Click **Save** in the upper left part of the toolbar to save changes.
5. (*If asked*) Restart TM Master.

For the office installation, the Document handling feature will be enabled after program restart and for unit installations -- after the first replication pass from the office.

To disable Document Handling:

- Go **System** -> **Settings**, click the **Documents** tab and uncheck the **Use Document Handling** checkbox.

Once you disable Document Handling:

- The Doc Handling features will be unavailable
- The access rights assigned to files will preserve, i.e. the files will stay read-only.

What's next:

- Getting Started with Document Handling

Getting Started with Document Handling

To get started with the Document Handling module:

1. (*If necessary*) Check that the the Document Handling feature is enabled in your TM Master system.
2. (*Accessible for admin users only*) Go **Document Handling** -> **Overview** to open the Document Handling module.
3. Perform any of the steps listed below:
   - Import your files onto the **QA Handbook** tab to further distribute them across your unit(s) (Figure 1. Importing your files (the **QA Handbook** tab).)
   - View your files available on your DB (using the **Owner Types** tab.) (Figure 2. Getting the overview of TM Master files (the **Owner Types** tab).)
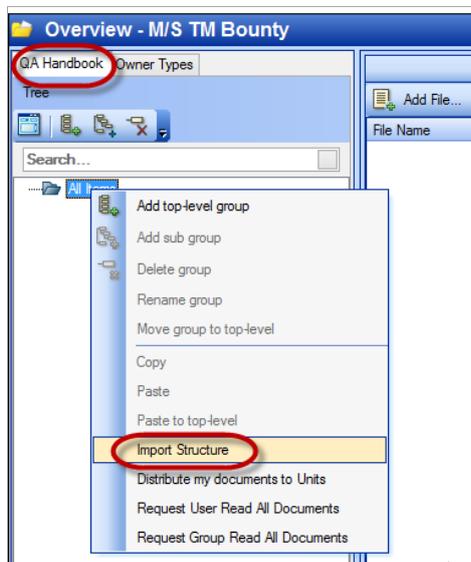
*Figure 1. Importing your files (the **QA Handbook** tab).*
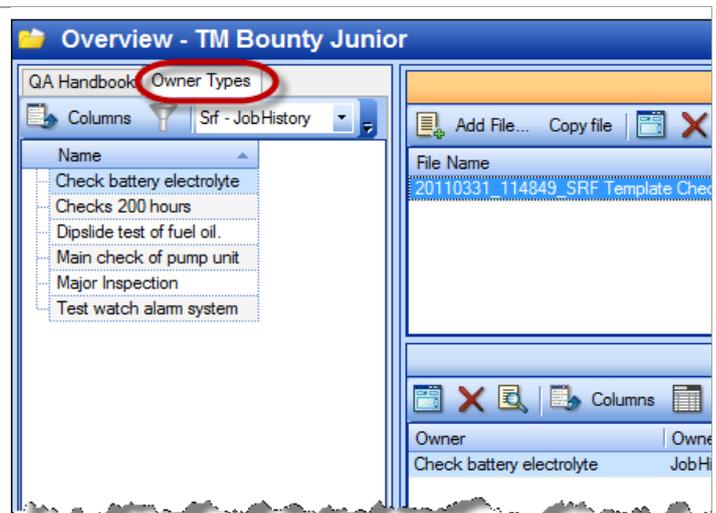
*Figure 2. Getting the overview of TM Master files (the **Owner Types** tab).*

4. Once you can access your files on either of the **QA Handbook** or **Owner Types** tabs, use the following control items to access the Document Handling features:
   - Right-click menu of the tree on the QA Handbook tab -- to perform actions specific to the imported files (Importing Files: QA Handbook)
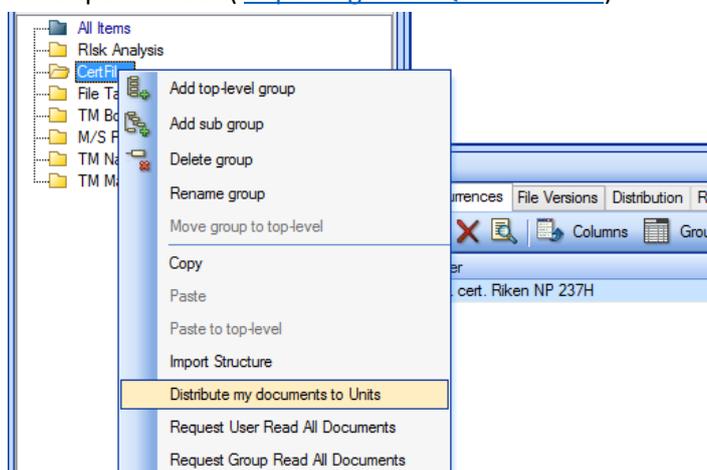
- The right hand side pane functionality -- to access the most part of the functionality ([How to add a single file?](), [How to Add File To different modules/entities](), [File Metadata tabs]()).
  The File Properties window is available for any files within your TM Master system.
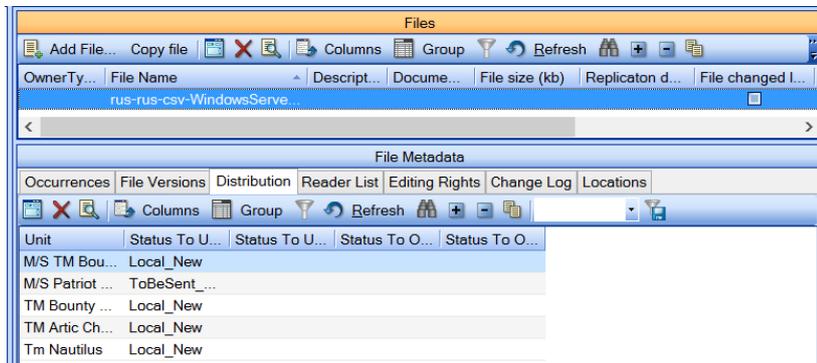
- The **Document Administration** section -- to monitor how users, crew members progress in reading documents they are required. ([Tracking the Reader's Progress : Documentation Administration]())
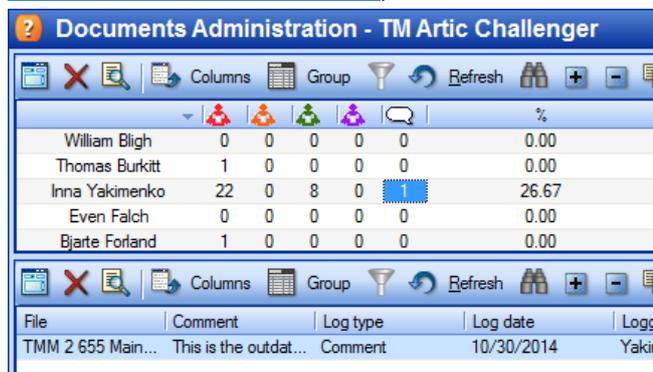
- Special **Documentation** section notifies users of new documents they are required to read, or updates of documents they have already confirmed read. (["How-to" for Users Required/Recommended to Read a Document]())

- Special right-click menu is available for all files throughout TM Master to edit the file, view details, or add it to QA Handbook is available for all users of your system (*if not restricted to certain users*).

	Open	Ctrl+O
	Edit	
	Save as new Revision	
	Delete	Ctrl+D
	Add File...	
	Copy file	Ctrl+C
	Paste file	Ctrl+V
	Save file as...	
	Print Preview	
	Select All	Ctrl+A
	Copy content to clipboard	
	Reset Grid Columns	
	Get settings	
	Open Details	
	Add to QA Handbook	
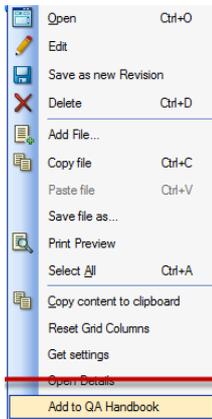
Managing User Rights

(*Requires SQL Server 2012 with Filestream enabled. Otherwise, despite user rights assignment, files can be edited via Windows Explorer.*)

By default, Document Handling provides following access rights to files within TM Master:

- "Admin" - this is a member of admin group in TM Master.
- "Owner" – this is any user who originally added the file or is set the "owner" of the file.
- "Non-Admin" – these are any users of TM Master either requested/recommended to read a document or any other users.

You can add more granular rights and lock the read, edit, delete functions to selected users (see Editing right for details).

The table below summarizes these rights.

Table 1. User Rights in Document Handling Functionality.

	Admin	"Owner"	Non-admin
Access to **Document Handling**	V		
Access to files in other than Document Handling module	V	V	V
	(if not locked to users with "read" rights on the Editing Right tab)		
File edits (follow the link for the exact list of functionalities)+ Rename File [Abc] , Add Comment [💬] , Open in Explorer (buttons on Properties window)	V	V	V
	(if not locked to users with "edit" rights on the Editing Right tab)		
File management (access to Distribution, File Version, Reader list, Editing rights tabs)		V	
	(If not locked to users with "admin" rights on the Editing Right tab)		
File removal	V	V	V
	(If not locked to users with "delete" rights on the Editing Right tab)		

Getting Overview of Files on TM Master v2 Database: OwnerTypes

NOTE: Ensure that you have physical access to files, otherwise the **File is not found** error will show when trying to open the file.

Use the **Owner Type** tab of Document Handling to get the overview of all documents attached to items in different modules of TM Master -- files, attachments, images, zipped folders, etc.

To get the overview of documents in TM Master:
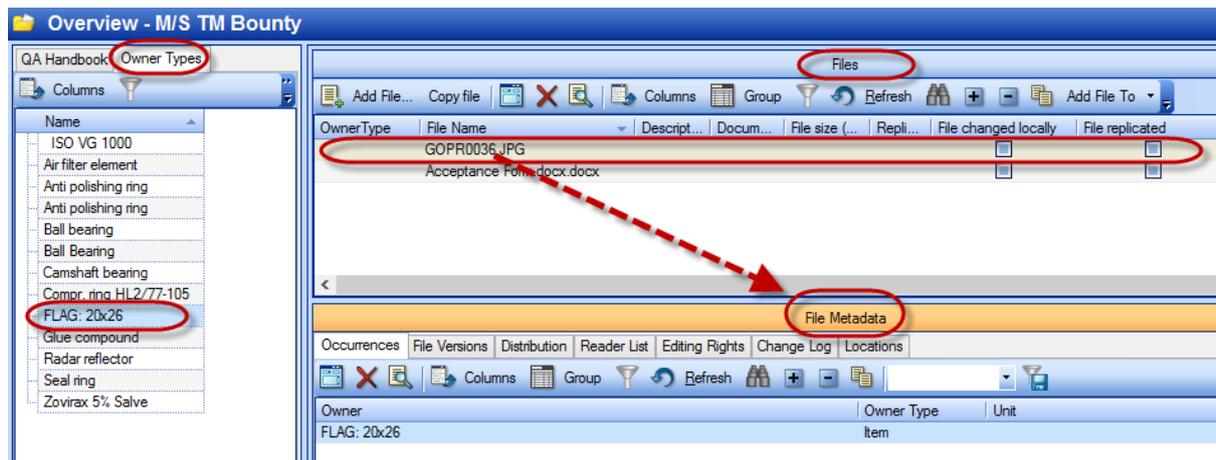
1. Go **Document Handling** -> **Overview.**
2. (*For office installations*) Check that you selected the right unit and/or vessel on the main toolbar.
3. Click the **Owner Types** tab.

4. Use the menu on the tab to switch between categories. (The **Alarm** category is selected by default.) The list of corresponding items with files attached will show on the tab in the **Name** column.
   The categories and their match to TM Master modules are referenced in the Table 8. Owner Types and their match in TM Master v2.
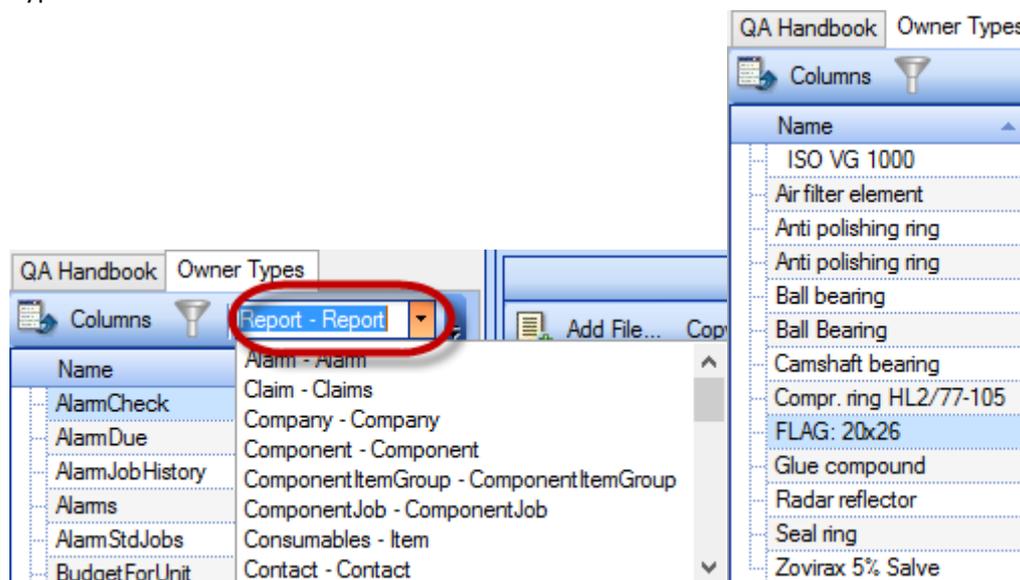
5. Select an item on the **Owner Types** tab (the **Name** column). The files attached to the item will show in the **Files** window to the right (referenced in Table 7. The Files grid). Click **Refresh** if no items show.

6. Select a file in the **Files** window to view the details or manage it in the **File Metadata** window (to manage replication, to set the active document version, to set access/editing rights for the document).
The columns of the grid on the **File Metadata** window are referenced Table 2. The File Metadata/properties tabs..

W h a t ' s   n e x t :

- Distribute (replicate)/re-distribute a file and otherwise manage replication.
- Adding files to modules.
- Request (recommend) users/user groups to read a file.
- Delegate rights to files.
- Edit files and set the active version.

Importing Files and Working with them: QA Handbook

(The chapter discusses how to import a folder with files into TM Master. To add a standalone file, use the Add File *button.)*

Use the **QA Handbook** tab to import files from any location you can access via your file browser into TM Master V2 system.

During import you copy files into the TM Master's System File Path.

You can perform the following actions with the imported files:

- Distribute files across your fleet to specific unit/unit groups
- Notify certain users/groups/crew types that they are required to read documents.
- Add files to desired modules ("Spare parts", "Components", etc.).
- Delegate read and edit control to files to selected users and groups.
- Etc.

How to Import Files?

When importing, you add a folder into the **All Items** hierarchy tree on the QA Handbook tab.

During import you can also choose to which unit/unit groups to distribute the files or postpone configuring the distribution settings.

To import a container with files:

1. Go **Document Handling** -> **Overview** and select the **QA Handbook** tab.
2. Right-click the **All Items** node or any desired folder on the **QA Handbook** tab, and then select **Import Structure**.
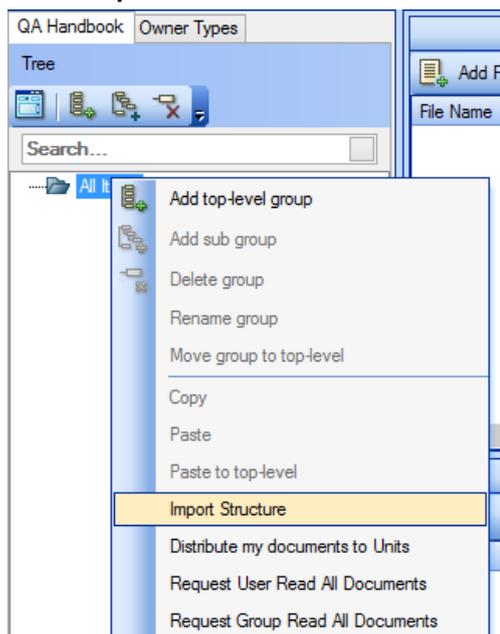
3. Confirm the information message and select the folder/disk to import. This can be any storage available via the file browser.
   Note: It may take a while to import more than 1 Gb.
4. (*You can skip this step and perform it later*) In the window that opens, select unit(s)/ unit group(s) to which the files will be distributed during the replication. (For more on distribution, see Distributing Imported Folders with Files)
   - Use CTRL+ to select multiple items.
   - Check the **All units** checkbox to distribute to all available units in one pass.

5. Click **OK** to start file import.

Once the import finishes:

- The imported folder shows on the QA Handbook tab with the files in the Files and File Metadata windows to the right.
- The imported files are copied into either the "Document Handling" folder of System File Path or the folder specified as your storage for your SQL Server File Table.
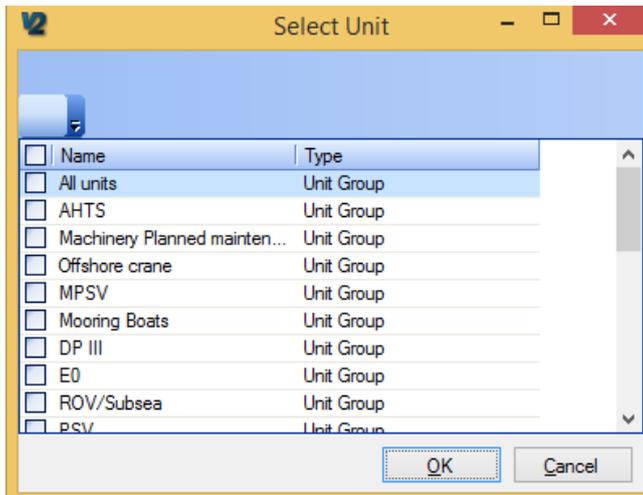- The imported files are "Read-only". During edits, new copies of files are created.
- The files are not assigned to any modules until you add them to modules (with the **Add File To** button).
- The files are not available on ship installations if you have not distribute the files to unit/unit groups and replicate them. (If replication is enabled and running, the replication is done automatically.)
- Once distributed or assigned to modules, everyone can see the files in
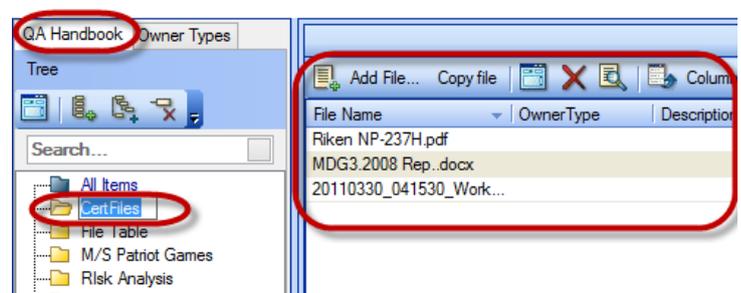
Figure 3. The content is imported onto the QA Handbook tab.

TM Master in the corresponding modules.

Distributing Imported Folders with Files

*(Applicable only to the **QA Handbook** tab content. To distribute individual files, see the corresponding functionality in [the Distribution tab](#) description.)*

When you distribute files, you specify to which units or unit groups files should go during the next replication pass.

You set the distribution parameters in one of the following ways:

- When [importing a folder](#) (described in the previous section)
  OR
- Using the **Distribute my Documents to Units** function (described in the current section below).

Once you apply the distribution parameters:

- The files are automatically replicated to the units specified during distribution configuration.
- You cannot discard the distribution parameters. You can only add more units/unit groups as distribution targets.
- Distribution parameters apply from parent folders to child.

To distribute imported folder with files to units/unit groups after they are [imported](#):

1. Go **Document Handling** -> **Overview**.

2. On the QA Handbook tab, right-click the desired folder, and then select **Distribute my documents to Units**.
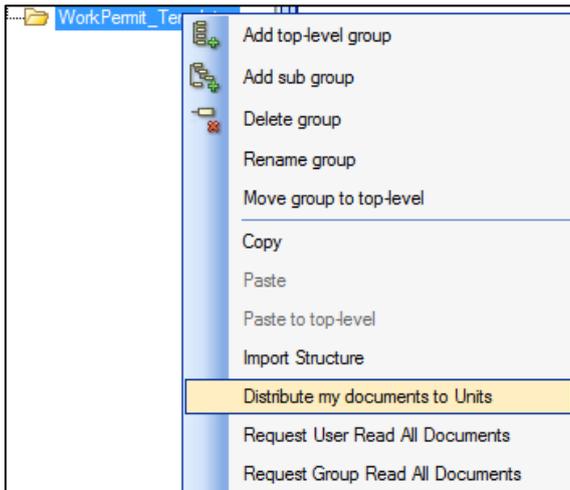
3. In the window that will open, select unit(s)/ unit group(s) to which to distribute.
   Use CTRL+ to select multiple items.
   Check **All units** to distribute to all available units in one pass.
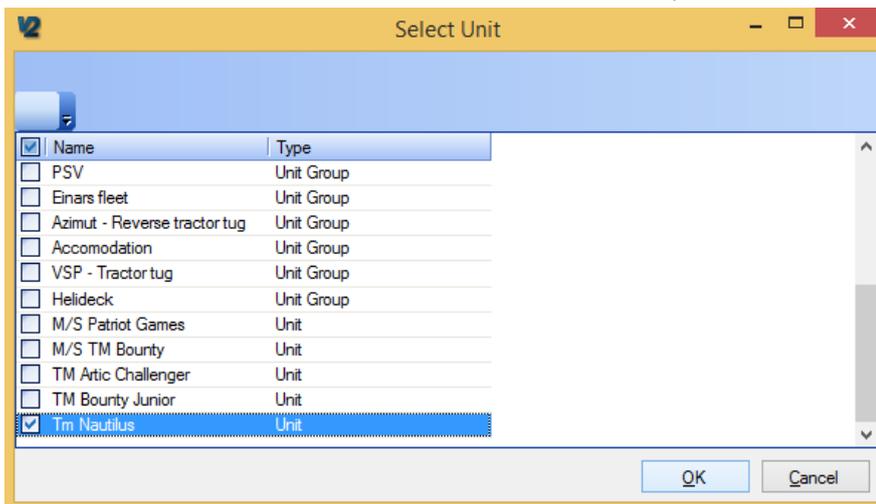
4. Click **Ok** to save the settings and quit.

Once you have successfully set the distribution parameters for the folder:

- The files stored within the folder will be distributed to the ship/unit group during the next replication pass.
  - The files will display in the corresponding unit/module section of the office installation and ship installation.

To cancel replication:

- When trying to re-distribute file(s) to move to more ships, you do not cancel or overwrite the distribution to previously selected vessels, you only add a new vessel as destination target.

To manage replication process:

- (*Applies to individual files*) Use the Distribution tab of the **Metadata** window to control the distribution (replication) process, track errors, and make minor corrections to file replication.

How to Request User/Group to Read all Documents in the Folder

(*This feature is applicable for folders. For individual files, see the Reader tab description.*)

You can notify users/user groups/crew types that they must read certain documents as well as track users progress on the reading process: finished or in process. Readers can confirm that they have read the document as well as add comments.

To request users/user groups to read the imported documents:

1. Go **Document Handling** -> **Overview.**
2. On the **QA Handbook** tab, right-click the necessary folder, and then select **Request User Read All Documents** or **Request Group Read All Documents** to notify the users or groups, respectively, that they have to read selected documents.
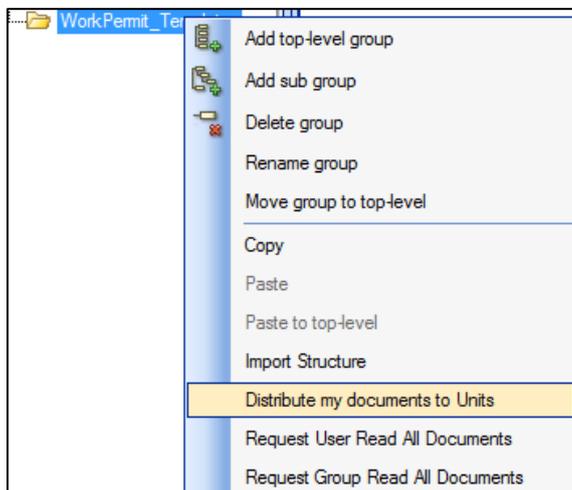
3. In the window that will open select users/user groups/crew types you wish to access the documents.
   (*Applicable for groups/crew types*) Use CTRL+ to select multiple items.
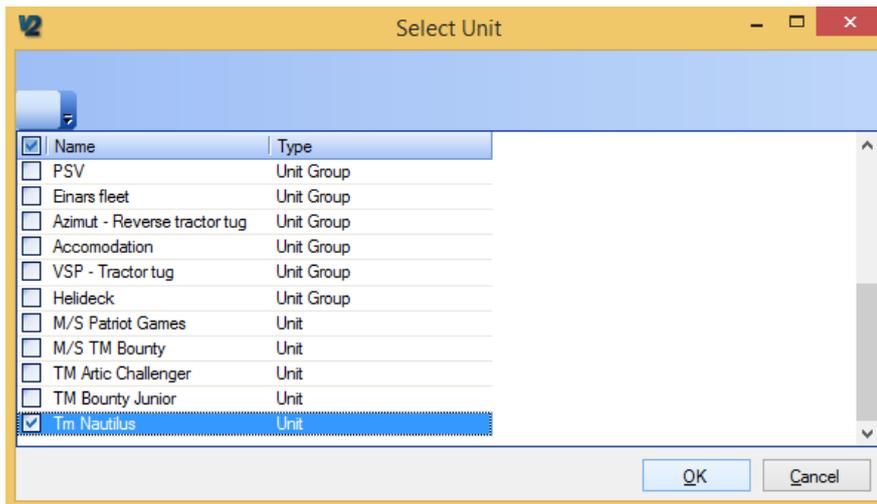
4. (*If necessary*) Click **Refresh** to display the newly added users/groups in the grid.
5. Click **Ok** to finish the procedure and quit.

Once you finish assigning users to read documents:

- Users can access and read the files in **My Place**-> **My Documents**.
- The user accounts will add on the **Reader list** tab of the **File Metadata** window.
- Users on other installations should "request" to download the file from office (unless it is Lock file to Owner) to the ship they are on.

To monitor users' progress in reading, or view their comments, etc.:

- (*For individual files*) Use The **Status** column on the **Reader** list grid.
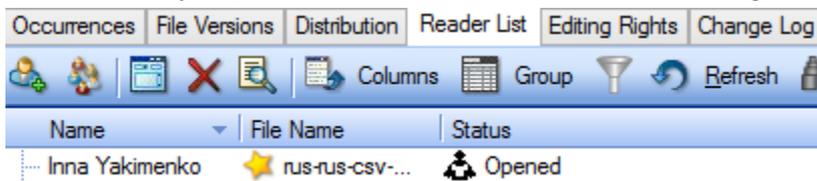
- (*For all the documents*) The **Documentation Administration** section of the Document Handling module.

W h a t ' s   n e x t :

- How to recommend users reading a document?
- How users can confirm that they have read the document

How to Delete the Imported Content?

You can choose to delete files you imported from the TM Master (still keeping them in the System File Path) or remove the folder but keep its content in the All Items folder.

To delete the files you imported:

1. From within the **QA Handbook** tab, right-click the folder you want to delete, and then select **Delete Group**.
2. In the window that opens, choose:
   - **Delete all elements** – to delete the folder and its contents from the TM Master. The files will still be available in the TM Master's System File Path.
   - **Set all elements to ungrouped** – to delete the folder from the tree on QA Handbook tree but keep the files in the **All Items** folder.

Adding a File to Different Modules

You can add newly imported files into modules as well as add files to other modules than they currently are in. One and the same file can be placed to as many modules as desired.

To add files to a module:

1. Go **Document Handling** -> **Overview**.

2. Locate the file(s) you want to move to modules (on either the **QA Handbook** or **Owner Types** tab).
   Use CTRL+ to select multiples files.

3. Click the **Add File To** [Add File To ▾] button on the **Files** toolbar and, in the list that appears, select the target module. (The items in the list are referenced in the Table 8. Owner Types and their match in TM Master v2.)
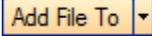
4. Select the target module's item in the **Select Owner** window.
   Use CTRL+ to select multiple items.

5. Click **Ok** to save the parameters and quit.

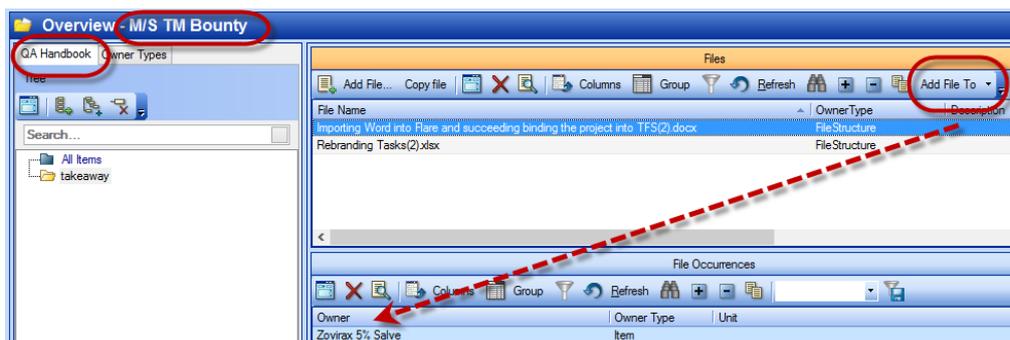Once you finish adding files to the module, the module will show as the **OwnerType** and the module item as the **Owner** of the file on the **Occurrences** tab of the File Property window (**File Metadata**).

Tracking Users Reading Progress: Documentation Administration

The *Documentation Administration* section provides an instant view of who has access to docs and accumulates the users' activities with documents in the **My Documents** section (**My Place** -> **Overview**) – if they have opened the document or not, comments they leave, etc.

To read the Documentation Administration grid:

1. Go **Document Handling** -> **Document Administration**.
2. In the row with the desired user, click on the cell of the desired status with the number other than "0".

Required read	:	To see list of files the user is required to read (in total or that have not been confirmed yet)
Recommended read :		To see list of files the user is recommended to read (in total or that have not been confirmed to have read yet)
Confirmed Read	:	To see list of files user has confirmed to have read (via the **Confirm Read** right-click button within **My Place** -> **Overview**)
File Updated	:	To see the list of files has been changed after it was either in the **Read** status or **Confirmed Read** status
Comments	:	To see comments the user added to the file (via the **Add Comment** button on **Files Properties** window). To answer the comment, use the **Add comment** button. The user will see your answer in the list of documents in **My Place** -> **Overview**.

3. The list of corresponding files for the user will show in the bottom grid.

F o r   r e f e r e n c e :

- To require (recommend) user to read a folder with documents, see <u>How to Request user/group read all documents in the folder</u>
- To recommend users reading a document, see <u>Reader List</u>.

Editing File

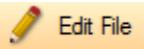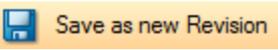(*To open and edit the file, ensure that corresponding software is installed on your computer.*)

(*Some functionality is available only for document owners.*)

(*Available for users with read rights*)

Only admin users or users with "edit" rights can edit files content and properties (on how to set editing rights, see the Editing Rights tab).

When you edit a file, TM Master V2 saves changes in a new copy.

To edit the file:

1. Right-click the selected file from anywhere in TM Master and select **Edit file** [Edit File button].
    (The button is also available in the Files Property window.)
    The file will open in the corresponding program.
2. Edit the file as necessary.
3. Save the file in the program you used to edit the file. Close the file.
4. The way you accessed the Edit File button – in the right-click menu or File Property window
    – access and click the **Save as new Revision** [Save as new Revision button] button to save your changes as a separate version.
    The version number shows next to the document name on the file name caption.
5. In the window that opens:

    *   Set the details for the version. (The default version number is "XX".)
    *   Mark within **Set As Active Revision** if you want to make the version active.
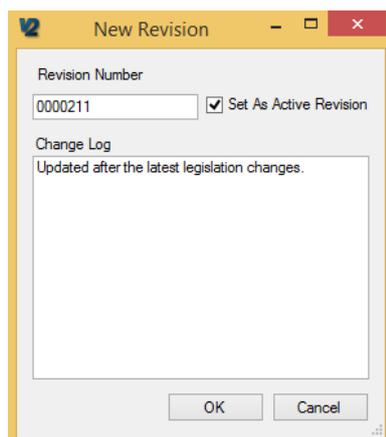
    The date of revision is added automatically.

The edits will save in a new file.

To view available file versions or set the desired version active:

- See the File versions section.
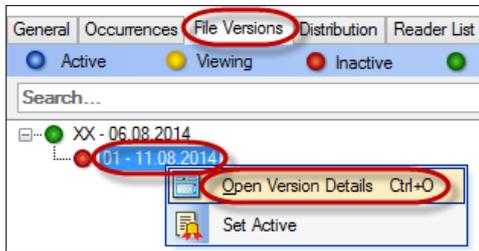
On how to edit file properties (day of issues, description, code of document, etc.):

- see General

To rename the file:

- The Rename button

To know the path to your edits:

- Open the desired version of the file via the **File Versions** tab, and then use the **Open in Explorer** Open In Explorer button.

Managing your Files: File Metadata tabs and File Properties Window

The File Metadata window and File Properties windows provide additional file management via following tabs:

- General – (available only on File Properties window) to set various file detail (document description, document code, etc.)
- Occurrences – to see exact items (OwnerType) to which the file is attached
- File versions – to manage files after edits (file versions)
- Distribution – to manage replication of the file)
- Reader List – to add "read" rights to users, to require (or recommend) users to read the document
- Editing right – to add "edit" rights to users
- Change log – to view what changes have been made to the file
- Location - to add the ship where a physical copy of the document is located.

The File Property window provides access to extra functions buttons. (See …)

The File Property window is available for all files within any grid of TM Master (provided that the Document Handling module is enabled), whereas the File Metadata window is available only within the Document Handling module.
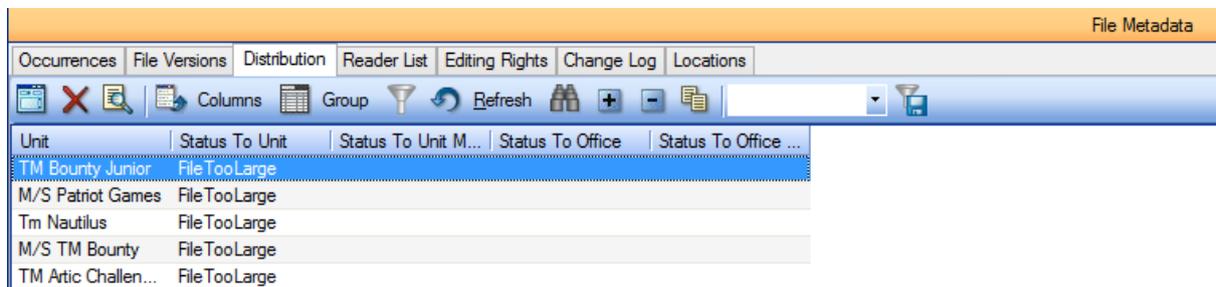
To open the File Metadata window:

Figure 4. The File Metadata window.

- Open the **Document Handling** module and find the **File Metadata** window in the lower part of the screen (*the view does not show the **General** tab*)
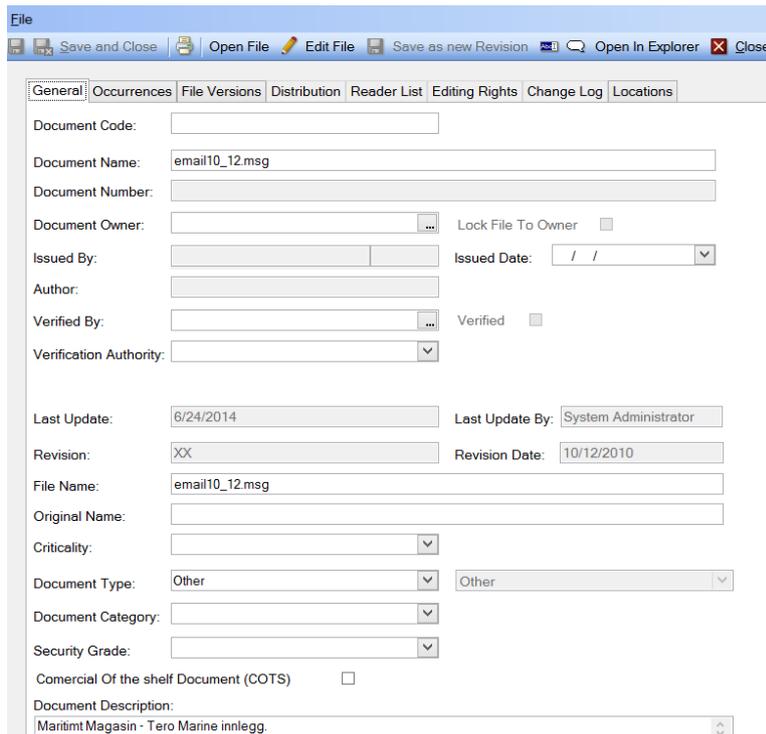
To open the File Properties window:

Figure 5. The File Properties window with the General tab and toolbar.

- Right-click the necessary file and select **Open**;
  or

- Select the file and click the **Open** button on the toolbar;
  or

- Double-click the selected file.

General

(**Note**: Some of the properties are available only for the file "owner".)

Use the tab to manually add additional info on the file.

Table 2. The File Metadata/properties tabs.

Property name	Description
Document code	Manually added text
Document name	Name of the file
Document number	Manually added text
Document owner	Defaults to the logged in user added the document. The functions of the Distribution, Reader List, Editing Rights, Change Log tabs and some functions on the File Versions tab are restricted to document owners. Any user can be the owner.
Issued by	Manually added text or select form the company list
Author	Manually added text

Verified by	Selected by current user when pressing the button. **Note:** Cannot be changed after verification.
Verification Authority	Manually added text
Lock file to owner	If enabled, only the owner of the file can see/change the file (if not certain rights are granted to users -- see the Editing right tab).
Revision	Manually added version number of the file. XX by default.
Criticality	Document criticality code
Document type	Select from the drop-down list to set the document type (SRF, Word, video, etc.)
Security grade	Manually add the security grade code.
Commercial off-the-shelf (COTS)	Mark if the document is of the Commercial off-the-shelf type.
Document description	Manually added text

Occurrences

The tab shows to which exact module and item the file is added / attached to.

- To add the file to modules or module items (owners), use the Add File To button (*See the Add File To function description.*)

Table 3. Columns on the Occurrences tab.

Column Name	Description
Owner	The exact entity name.
Owner Type	The entity type (spare part, medic, etc.)
Unit	The name of the ship or other unit group

File versions

Document Handling allows TM Master to store all the edits users make to the file in separate file versions. Use the tab to manage these file versions:

- To view the list of available file versions with edits.
- To set the current active version of the document.

To save changes as a new file version:

- *See the Editing File section for more info*.

Currently, you cannot import the new file into the existing record of the file. To attach a new file instead of the previous one, add the new file and. Use the commenting function to notify that the document is outdated and add the path to the newest file.

To view versions of the document:

1. Open the File property window and switch to the **File Versions** tab.
2. The tab contains the list of revisions with dates and the oldest revision (creation) set on top.
3. The file version reads as follows:

    - the version status (see the Table 4. File version statuses description.)

   - the version name/number (**XX** by default. To edit use the **Revision** field on the General tab.)

    - the date the version was created.

Table 4. File version statuses description.

Icon	Description
Active	This file version is set as currently active file version.
Viewing	The File Property window of the file is currently opened locally.
Active and Viewing	The file is an active version and is currently open.
Viewing	The file is neither the Active Revision nor the Revision you are currently viewing.

To open the file version/edit the file and its properties:

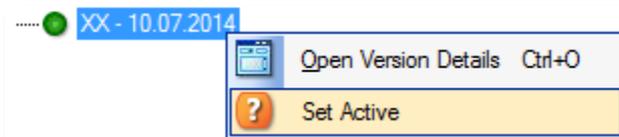1. Right-click the desired version and select **Open Version Details**.
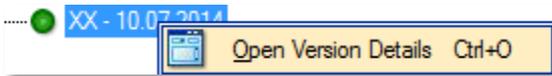
2. Use the File metadata window that opens to open the file or view/edit the file version properties.

To set the desired version as the currently active version:

(*Available only for the document owner*)

- Right-click the version number and select **Set Active**.

    .

   The selected version will display as .

Distribution

(*Available only for the document owner.*)

(The chapter applies to individual files. On how to distribute files within folders during or after import, see Distributing Imported Folders with Files.)

The distribution (replication) parameters are either assigned when importing files into TM Master or inherited from other replication settings of the files.

The tab enables the following actions with individual files:

- Monitor the file replication progress and see the targets and status (success, errors, etc.);
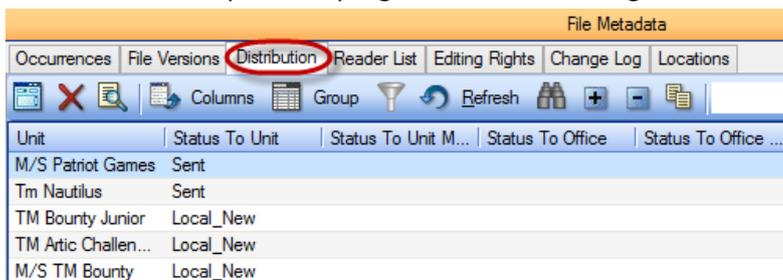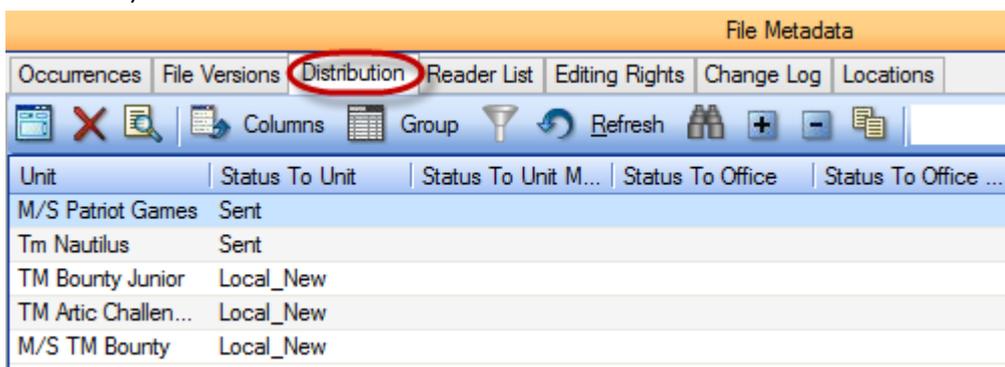

- Manage the replication process: send file to extra desired units, etc.
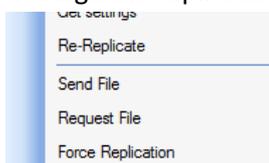
To monitor replication of the individual file on the Distribution tab:

- Use the grid of the **Distribution** tab of the File Metadata or File Properties window to know the current replication status of the file: whether it has replicated successfully or a unit is waiting for the office to get the file, etc. (Use Table 5. The Distribution tab grid description. for reference.)

To manage replication:

- On the **Distribution** tab of the File Metadata or File Properties window, right-click the desired unit and then select:

Open	Ctrl+O	
Delete	Ctrl+D	
Print Preview		
Select All	Ctrl+A	
Copy content to clipboard		
Reset Grid Columns		
Get settings		
Re-Replicate		
Send File		
Request File		
Force Replication		
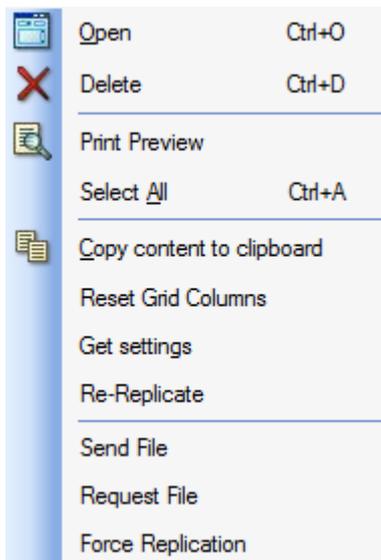
- o **Send File** – to send the file to the selected ship (unit) through replication process.
- o **Request File** – use only for debugging purposes. Only experienced users should use the button.
- o **Force Replication** – use only for debugging purposes. Only experienced users should use the button.

The current replication status for the file shows in the **Status To …** columns.

The replication starts automatically once the file is assigned with the distribution parameters or otherwise updated.

Table 5. The Distribution tab grid description.

Column Name	Column Status	Description
Unit	Name of the ship	Shows the list of ships of your fleet.
Status to Unit/ Status to Office	Reports the state of replication status from **Office to Unit** and from **Unit to Office**, respectively.	
	None	
	Local_New	The newly imported files are in Local_New state, i.e. have not been distributed/replicated to any ships/unit groups.
	Revision, ToBeSent_New, ToBeSent_Updated, ToBeSent_Active, ToBeSent_Requested, Sending, ForceFileReplication, Sent, Received	Replication is starting.
	FileTooLarge	Replication failed. • Go [**Fleet**]-[**Units**], select the "**Settings**" tab and type in "**Max size replicated files**": to increase the file replication size. Once settings are changed, the replication will start at the next replication loop.)

		Or • Click **Force replication** in the right-click menu.
	[Error]	Replication failed due to the reason in the Status to **Unit Message/Status to Office Message**
Status to Unit Message/ Status to Office Message	Shows Error messages when the status is set to 100 (Error). This will enable the office to see issues on the unit without needing to contact the unit.	
	"File Not Found", "Error Adding File To Archive" "Error Moving File to COMM" .	There are issues accessing the file, or issues with rights to folders.

W h a t ' s   n e x t :

- Allow other users access the document (Reader List).
- Request selected users or groups of users to read the file. How to Request User/Group to Read all Documents in the Folder

Reader List

(*Available only for the document owner.*)

Use the Reader List tab to grant "read" rights to the file to selected users/user groups/crew types. The read rights allow:

- To access documents (via My place - > Overview -> My documents).
- To request (or recommend) user to read the document and monitor user's progress in reading.

To require (or recommend) user or user group to read a file:

1. On the **Reader List** tab of the File Metadata or File Property window, click to add the user or to add group from the list.
2. Right-click the file and select **Require read** or **Recommended**.

To require (or recommend) user or user group to read documents in a folder (imported via the QA Handbook tab):

- See How to Request User/Group to Read all Documents in the Folder.

Editing right

(*Available only for the document owner.*)

Add user or user group to this grid to grant them with the following rights:

- Read – user can open the file. The file does not display in My Documents.
- Delete – user can delete file.
- Edit – user can edit file and its properties.
- Admin – user can read+edit+delete the file.

To set/change user privileges:

1. From within the **Editing Rights** tab of the [File Metadata](#) or [File Property](#) window, click ![icon] to add the user or ![icon] to add group.

2. Double-click the user/group and set the necessary right or rights.
   Leave the **None** privilege as is: it will change automatically.

3. (*If necessary*) Click **Refresh** to display the newly set rights (privileges) in the **Privilege** column of in the grid.
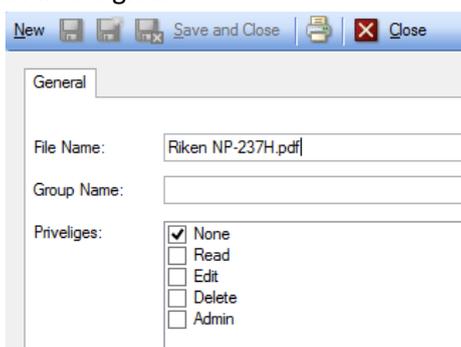
Change log

(*Available only for the [document owner](#).*)

Shows the history of the following type of changes to the file:

- Revision change
- Change of active version
- Rename of the file

- User comments

Location

Displays the current physical location of the document – the location of the ship where a physical copy of the document can be found (*if the info on the ship locations is available on the **Ship -> Location** of the Navigation pane*).

To add a location:

- From within the **Locations** tab of the File Metadata or File Property window, click and choose the necessary data.

Viewing Files

To view a file in the Document Handling:

(*Only admin users can access Document Handling*.)

1. Go **Document Handling** -> **Overview.**
2. (*For office installations*) Check that you selected the right unit and/or vessel on the main toolbar.
3. Use either the **QA Handbook** tab or the **Owner Types** tab to access the necessary file storage in the left-hand pane.
4. The corresponding files will display in the right-hand **Files** window (referenced in the Table 7. The Files grid.)

To open a file:

- In the Files window, right-click the file and use the **Open File** `Open File` button (the button is also available in the File Property window).

To open a certain version of the file:

- Locate the file and use the **File versions** tab to select the necessary version and then use the **Open File** button.

Document Handling Features outside Document Handling

When Document Handling is enabled, the following functionality will be available throughout TM Master:

- "How-to" for Users Required/Recommended to Read a Document
- Add to QA Handbook
- Editing and Viewing Files

"How-to" for Users Required/Recommended to Read a Document

Below is the workflow for users required or recommended to read documents.

Use the **Document** section within **[Currently logged in user]'s Place** -> **Overview**:

- To get notified in case new documents are added into TM Master for you to read them.
- To work with the file and automatically inform the authority that you are reading the document or confirm that you have read the file.

To work with the documents you are required/recommended to read:

Step 1. Go **[Currently logged in user]'s Place** -> **Overviews**-> **Documents**.
In the **Documents** section, either click the **Documents** link or document section below.
The list of corresponding documents will show in the lower bottom of the window.

Step 2. Right-click the necessary file, and then:

- select **Open** to open and read the document.
- Select **Confirm read** to confirm that you have read the document.
- On how to use **Open Details**, see Editing and Viewing Files.

*Table 6 The Documents grid on [Currently logged in user]'s Place -> Overview.*

Status	Description
Documents Required read	Documents that the file owner has required the currently logged in user to read.

Documents Recommended read	Documents set as recommended for reading for the currently logged in user.
Documents Confirmed Read	Documents that the currently logged in user has confirmed to have read.
Documents Updated After Opened	Documents that have been changed since the currently logged in user opened them.
Documents Updated After Confirmed Read	Documents that have been changed since the currently logged in user confirmed them read.
Documents Opened	The "Required read" or "Recommended read" documents that the currently logged in user has opened but has not confirmed read. Right-click the file and select **Confirm read**, when ready.
Documents owned	The currently logged in user is the "owner" of the documents listed.

Add to QA Handbook

(*Available if the Document Handling is enabled*)

Use the **Add to QA Handbook** ⬚ Add to QA Handbook ⬚ button on the Documents tab of any items and components when it is necessary for users without access to Document Handling module (non-admin users) to add documents to QA Handbook structure.
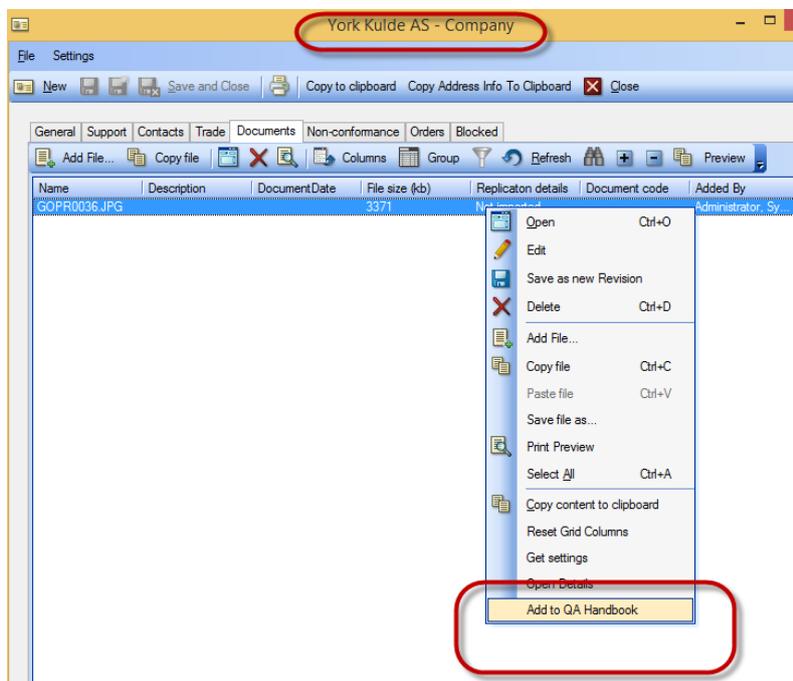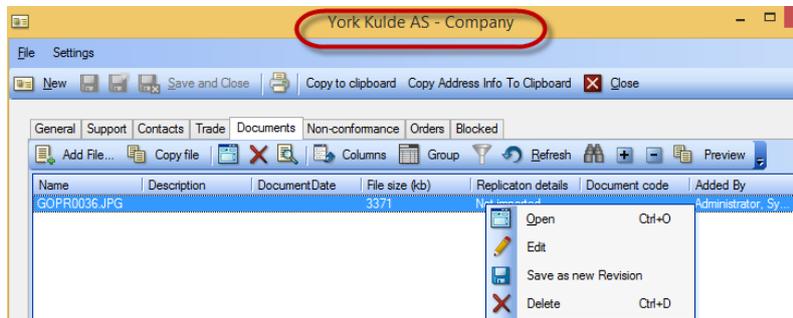

Editing and Viewing Files

By default, any user can view or edit files added to TM Master and access Document Handling file property window.

Consider locking file edits to the document owner or assigning access/edit rights only to certain users.

The edit procedure is described in the Editing File section.

Appendix

Tables below explain the following grids:

- The Files grid
- Owner Types and their match in TM Master v2.

The Files Window Grid
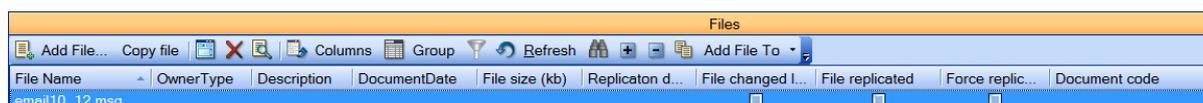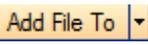
The table below explains the columns of the Files grid.

Figure 6. The Files Window Grid.

Table 7. The Files grid

Column name	Description
File name	The current name of the file. (To change the name, use the **Rename File** ![Rename File button] button.)
OwnerType	An item within the module that holds the file. (To move to another module, use the Add file to ![Add File To] button.)
Description	File description manually added when adding the file or on the General tab of the File Metadata window.
Document Date	The date the document was added to TM Master.
File size	The size of the file. May be vital when replicating files.
Replication Details	Provides info on the current replication status of the file: • **Not imported** – the file has not been replicated onto the local installation. • **Changed**, **not exported** – the file with changes has not been replicated from the local installation to the target. • **Forcing export** – the replication from the local installation is in progress. • **Not imported**; • **OK** –the file has been successfully replicated; • **Waiting for import** – ??? To know the replication target, use the Distribution tab.
Files changed locally	V - file changed locally. □ - file not changed locally ▣ – no info available.
File replicated	V - file replicated successfully □ - file assigned for replication has not been replicated (for possible errors, refer to the Distribution tab) ▣ - no info available
Force replication	V – forced replication passed successfully □ - forced replication has not finished (for possible errors, refer to the Distribution tab)

	☐ - no info available
Document code	The code of the document manually added. To edit the code, use [the General tab](#).

Owner Types and their Match in TM Master v2.

(*Details [the QA Handbook tab](#).*)

Use the table below to know to what exact TM Master item each Owner Type refers.
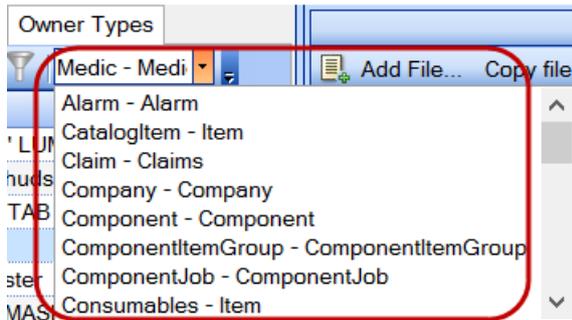

Table 8. Owner Types and their match in TM Master v2.

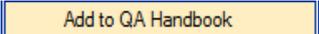**Note:** Sometimes Owner Type items may display no files. Look for other related owner types to locate the files attached.
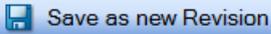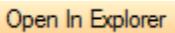
Owner Type	Location in TM Master
Alarm-Alarm	• Inventory -> Alarm system • Fleet -> Alarm jobs • Fleet -> Crew list
Cert Files	• Fleet -> Certificate overview
Certificate	Some older data are stored within this category.
Claims- Claims	• Fleet -> Defects and Claims • Maintenance -> Contacts • Inventory -> Defects and Claims
Company-Company	• Inventory -> Contacts • Maintenance -> Contacts
Component-Component	• Inventory - > Components ->Documents/Certificates
ComponentItemGroup - ComponentItemGroup	• Inventory/Fleet -> Components -> open the desired Component -> Spare Parts tab -> bottom left grid under the Group Files heading (control activates by selecting a group in the tree structure above)
ComponentJob – ComponentJob	• Inventory -> Components – Job -> Documents • Maintenance -> Project -> jobs in project
Consumables-Item	• Inventory – Catalogue -> General (photo) or Documents

Contact-Contact	• Crew list –> Document • Crew -> Overview -> Photo
Crew - Contact	• Crew
Docking - Docking	• Docking -> Docking -> Attachments • Docking -> Docking Overview -> Attachment
DockingITem	• Docking -> Docking -> Attachments • Docking -> Docking Overview -> Attachment (The Docking Items are jobs, while the Docking is a group of Docking Items.)
Handover-HandOver	• System's Place -> Handover ->
Imagine-FlexGrid	Administration - > Imagine -> right-click «Open Details" reports tab.
Job History	• Standard job -> History
Medic-MedicItem	• Inventory -> Medic
NC-NCR	• Contacts -> NCR-> Files • Inventory -> NCR -> Files • Fleet -> NCR -> Files • Purchasing -> Order (of certain types) -> Create NCR -> Files
PO - OrderHead	• Purchasing -> Overview -> Draft -> Order Head
ProformaInvoice-ProformaInvoice	• Purchasing - > Pro forma invoice
Report-Reports	• Administration -> Reports
Sparepart-Item	• Inventory -> Spare Parts
Srf-HandOver	• System's Place -> Handover- >SRF
Srf-JobHistory	• Inventory/Fleet -> Components -> Open Component -> Job History Tab -> Open a job history -> in the middle of the group of text boxes on the right side of this control, there is a text box with a button. If the job has an SRF template.
Srf-WorkPermitToJobHistory	Workpermits to job history entries that have been made from templates and connected to a workpermit on a Job.
Standard Job-Job	• Inventory/Fleet -> Components -> Open Component -> Job History Tab -> Open a job -> a field for SRF Template in the middle right part of the form (This is the template used for the Job History SRF field)
Substance-IHMSubstance	• Inventory -> Hazardous Materials -> top right grid IHM Substances -> open the Details window with the Documents tab (bottom right grid is Substance occurrences, and the tree to the left is Substance categories.)
UnitFile – Unit	• Fleet -> Units • Ship -> Details -> Document tab

Voyage-Cargo	• (Fleet) -> Voyage -> Voyage -> History -> select voyage -> Cargo -> Documents • (Fleet)-> Voyage -> Current voyage log -> Cargo -> Documents • (Fleet) -> Voyage -> Voyage -> select voyage -> Cargo -> Documents
Voyage – VoyageEvent	• Voyage -> Current voyage log -> Document Voyage -> Current voyage log -> Add sailing event -> Documents
WorkPermit- WorkPermitToJobHistory	The same as for Srf-WorkPermitToJobHistory
WorkPermitTemplate- WorkPermit	Maintenance -> Work permit

Buttons

The table below explains buttons used throughout Document Handling. Also available from the right-click menu of a file.

Button	Description
Add File Add File...	Adds a single file anywhere into the selected item on the QA Handbook or the Owner Types tabs. Once added the file will inherit all the settings of the nested item: owner type, distribution, etc. The user who has added the file is the "owner" of the document and get access to file managing features.
Available on the right-click menu of any file (restricted to special user rights)	
Add to QA Handbook **Add to QA Handbook**	See Add to QA Handbook.
Open File Open File	Opens the file content in the corresponding program, see Viewing Files.
Edit File Edit File	Initiates the file edit process, see Editing File.
Save as new Revision Save as new Revision	Saves file edits as a new version of the file (see File versions for details). The button gets activated once the **Edit File** button is clicked.
Available only on the File Property window	
Rename File	Use to rename the file. Once the name is renamed, the version history of its original file gets lost.
Add Comment	(*For the document owner only*) Adds a comment to the file. Once added, the comment gets listed on the Documents Administration.
Open in Explorer Open In Explorer	(*For the document owner only*) Open the file storage path in a service folder.