

Automated Document Repository System (ADRS) Quick Reference

The Automated Document Repository System enables the storage of printed forms each time they are printed.

1. Setup

- a. File Storage Directory
 - i. From the Main Menu screen, left-click Administration, left-click System and left-click System General Defaults.

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| Sy | stem • | Groups * | Utilities | Forms Setup * | 🄏 Cont | ract | III Genera | al By Code 👻 | 🔠 Documen | ts By Code | 🝷 🐹 Engineering & F |
| A | Set | Global Con | npany Nar | ne(s) | | | | | | | Tables Lis |
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| | Sen | vers and Ta | sks Setup | | | | | | | | |
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ii. The Company Setup window will appear. Left-click the Modules tab.

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iii. Identify the directory in which you would like copies of printed forms to be saved.



- iv. If you would like to save printed forms in different directories based upon document type, you may do so by using the **Other Directories** button.
 - 1. Left-click the **Other Directories** button.
 - 2. The **Other Directories** window will appear. Left-click the **Add** button on the **Other Directories** window toolbar.

| ther Directories | | Σ |
|------------------|------------------------------------|---|
| - | | |
| C <u>l</u> ose | | |
| Add Edit Delet | e | |
| Category | Directory | |
| | <no data="" display="" to=""></no> | |

3. The New Directory window will appear.

| New Directory | 23 |
|---------------------------|----|
| \times \checkmark | |
| <u>C</u> ancel O <u>K</u> | |
| Category : | |
| Directory : | |

- a. **Category** field Select the document that you would like to have stored in a separate directory from the drop down list.
- b. **Directory** field Identify the directory in which you would like the printed forms originating from the document identified in the **Category** field to be stored.
- c. Left-click the **OK** button on the **New Directory** window toolbar to save the record and close the window.

CONTINUE TO NEXT PAGE



4. The new directory designation for the selected document category will appear in the grid on the **Other Directories** window.

| Other Directories | | | Σ | 3 |
|----------------------------|--------------|--------|--------------------------------------|---|
| ↓ C <u>l</u> ose | | | | |
| Add | Edit | Delete | | |
| Category | | | Directory | |
| ▶ Maintenance XL | . Work Order | | D:\PENTAGON2000SQL9\PrintedForms\MNT | |
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- 5. Left-click the **Close** button on the **Other Directories** window toolbar to close the window.
- v. Left-click the **Close** button on the **Company Setup** window toolbar to close the window.
- b. Document Setup

NOTE: ADRS is customized at the company level.

i. From the Main Menu screen, left-click Administration, left-click System and left-click Company/Div/Dept Setup.



ii. The **Company List** will appear. Select the appropriate company (left-click the line within the search window and left-click OK; or double-click the line within the search window).

| Start With : | ••• |
|-----------------|------------------------------------|
| | Max Search Result Lines : 50 |
| Drag a column h | eader here to group by that column |
| | |
| Company No | Company Name |
| - | Parts and Maintenance Corporation |
| | Bravo Airlines Inc |
| | Slatten Logistics LLC |
| | Clarent Edgeride EEC |
| ; | |
| | |



iii. The **Company** window will appear. Left-click the **Optn** (Options) button and left-click **12. Automated Documents Repository System (ADRS)**.

| Company: [1] - Parts and Main | tenance Corporation | |
|---|---|----|
| 🗙 🗸 🏷 🎇 | (2) | |
| <u>Cancel</u> O <u>K</u> <u>P</u> review Optn | Import Setup | |
| | 1. Define MFG list type Codes | |
| Company Divisions / Departments | 2. Stock Setup | 9 |
| | 4. Inter Company Transaction GL Code | |
| Company : Parts and Maintenance | 5. W/H Transfer Default Additional Print Forms | |
| Address : Your Total Distribution | 6. W/O Default Additional Print Forms | |
| Address : 15 West 34 Street | 7. Warranty Defaults | |
| Address : | 8. Default Printer for Quote Profit Report | |
| City : New York State | 9. Default Printer for Sales Order Profit Report | |
| County : Cour | 10. Save Forms Copies as PDF in the Designated Folder | |
| E-Mail: http://www.pentagon2 | 11. Defaults Banks for Payment Transfer | |
| http://info@pentagon2000.co | 12. Automated Documents Repository System (ADRS) | эр |
| IRS EIN#: | Part NOT on File Color Indicator : | |

iv. The Automated Documents Repository System (ADRS) window will appear.

| <u>C</u> ano | el O <u>K</u> | | |
|--------------|---|------------------|-----|
| Sale: | \$ | | |
| | Doc. Type | Image/File Type | |
| | Sales Order | | ľ |
| | Repair Receiver | | |
| | Picking Ticket | | |
| [7:23] | la la ar | · | _ |
| Oper | ations | | |
| | Doc. Type | Image/File Type | |
| | Work Order to Customer | | |
| | Maintenance Work Order To Customer | | |
| | Card To Customer | | |
| | | | |
| Purc | hasing | Image /Cile Tune | |
| | Doc. Type | Image/File Type | - r |
| | Durshave Order | | |
| | Purchase Urder | | |
| | Repair Shipper - Micking Licket | | |
| | hepair Snipper - Macking Slip | | _ |
| | Transfer | | |
| W/H | Doc. Type | Image/File Type | |
| W/H | | | |
| W/H | W/H Transfers Consolidator | | |
| W/H | W/H Transfers Consolidator | | |
| W/H | W/H Transfers Consolidator | Save Copies | |
| For | W/H Transfers Consolidator mat PDF Format | Save Copies | |

The window is split into six (6) group boxes: four (4) of which operate similarly, but for different documents; the remaining two (2) identify general settings of the module.

- 1. Document group boxes (Sales, Operations, Purchasing, and W/H Transfer)
 - a. Flag column Mark the flag that corresponds to each document that you would like to save as "checked".
 - b. **Doc. Type** column Identifies the document type.



c. **Image/File Type** column – Identify a code from the **Image/File Type List** by left-clicking the ellipsis in the right side of the column.

| Start With : | ••• | | |
|------------------------|-----------------------------|----------------------------|---------------------|
| | | Max Search F | lesult Lines : 50 📫 |
| Drag a column header h | ere to group by that column | | |
| Code | Name | Print In MNT Card Traveler | Print In Work Order |
| 001 | 8130 FORM | No | No |
| 002 | CERTS | No | No |
| 003 | TEST RESULTS | No | No |
| 004 | PACKING LIST | No | No |
| 005 | ATA 106 | No | No |
| 006 | DRAWING | Yes | Yes |
| 007 | Picture | No | No |
| 008 | C.O.C. | No | No |
| 009 | Test Results | No | No |
| 010 | Service Tag | No | No |
| MNT | Maintenance XL Work Order | No | No |
| QRP | Quick Reference Procedure | No | No |
| QTE | Customer Quote | No | No |
| | | NU | |
| () | | | |

NOTE: New image/file types may be set up from the **Administration** menu. Left-click **Stock By Code**, then left-click **Image/File Type**.

d. In the example below, quotes will be saved and assigned an image/file type of "QTE"

| Automated Documents Repository System (ADRS) | | | | | | | | | |
|--|------------------------------|--|---|--|--|--|--|--|--|
| \geq | $\times \checkmark$ | | | | | | | | |
| Canc | el O <u>K</u> | | | | | | | | |
| Sales | Sales | | | | | | | | |
| | Doc. Type Image/File Type | | | | | | | | |
| V | Quotation | | | | | | | | |
| | Sales Order | | | | | | | | |
| | Repair Receiver | | | | | | | | |
| | learning and a second second | | ¥ | | | | | | |

2. Format group box

- a. **PDF Format** radio button Select to save all documents in PDF format.
- b. **TIFF Format** radio button Select to save all documents in TIFF format.
- c. By Account radio button Select to save based upon the default settings of the related customer (for Sales and Operations documents) or vendor (for Purchasing documents) accounts. The default file type may be found in the Email Format field of the Defaults tab of the Customer (or Vendor) file.
- 3. Save Copies group box
 - a. Single Copy radio button Select to save only a single copy of each document that is printed.
 When the document is reprinted, the previous version of the document is deleted and replaced with the new copy of the document.



b. **Multiple Copies** radio button – Select to save a new copy of the document each time the document is printed. When the document is reprinted, a new version of the document will be saved.

2. Functionality

Each time a document is printed a copy is saved to the directory that was set up for that document type (or to the general printed forms directory if no directory was set up for the document type) and linked to the document as an attachment at the document level.

a. From the document, left-click the **Optn** (Options) button on the document window toolbar. Select **Attachments** and then left-click **Document Attachments**.

| Quotation No. 001077 For : ABC AIRL | INES, LL | c | | | - 23 | |
|---|-----------------------------|---------------------------------------|--|---|-------------|-------------------|
| Add Edit Del Yoid Prev Nu Header Lines [USD] Ship/Bill Setup Buote No. : 001077 | ext <u>P</u> rin Charges | nt Upd Crncy Optn Taxes Commission | Srch God OK Close <u>1</u> . Go To Line <u>2</u> . Go To P/N | | | |
| Quote Type : 0/H And Repair Quot | • • • | Your Ref# : | Customer Memo Update Quote Totals Images | • | | |
| | ¥ | Contract : | <u>6</u> . Attachments 7. AutoSource | • | Document At | tachments ents |
| ABC ABC AIRLINES, LLC | | Entered : 1/20/2014 4: | 8. Shoot R.F.O. By Vendor | l | _ | |

b. The **Documents List** window will appear displaying the list of attached document copies in the grid. The example below has "Multiple Copies" enabled.

| Add Edit Edit Delete View Close Search For : | Quotation [Documents List] :QT | | | | 23 |
|---|----------------------------------|------------------------|-----------------|----------------------|----|
| Search For : Image/File Type Attached on date P Quotation 001077 QTE 5/19/2014 5.14:21 PM Quotation 001077/ Revision : 1 QTE 5/19/2014 5.15:25 PM | Add <u>E</u> dit <u>D</u> eler | e <u>V</u> iew Cla | ose | | |
| Title Image/File Type Attached on date Quotation 001077 QTE 5/19/2014 5:14:21 PM Quotation 001077/ Revision : 1 QTE 5/19/2014 5:15:25 PM | Search For : | | | | |
| Quotation 001077 QTE 5/19/2014 5:14:21 PM Quotation 001077/ Revision : 1 QTE 5/19/2014 5:15:25 PM | Title | | Image/File Type | Attached on date | |
| Quotation 001077/ Revision : 1 QTE 5/19/2014 5:15:25 PM | Quotation 001077 | | QTE | 5/19/2014 5:14:21 PM | |
| | Quotation 001077/ Revision : 1 | | QTE | 5/19/2014 5:15:25 PM | |
| D:\PENTAGON2000SQL8\PrintedForms\QT0001077_Revision_20140519_0514.pdf | D:\PENTAGON2000SQL8\PrintedForms | 010001077 Revision 201 | 40519_0514.pdf | | |

END OF DOCUMENT