

Document History

Version	Date	Modified Section	Reason
1 - 9			Details in version 1 - 9 of this document
10	2007-01-19 2007-05-16 2008-05-06 2008-05-14 2008-05-23 2008-05-28	All 2.9 1.3 1.3 3.6	AM controlled document workflow described Document status text improved. Minor editorial changes. Text rewritten Text rewritten Printing chapter added
11	2008-08-26	1.3	Text rewritten
12	2009-11-30	4.6	Responsibilities updated
13	2010-01-05	2.8 4.6	Approval of documents table added Responsibilities updated
14	2010-12-20 2011-02-25 2011-04-20 2011-05-19 2011-06-14 2011-08-15	1.1 1.3 2.4 3.2 3 4.6 2.3	AM name removed. New name of this tool is TeamWork (TW) Text updated to describe manual releases after each command. Added instructions how to remove non existing template path from your document. Document type 1 is cancelled. Use types 0 or 2 instead. See 14078 item 7 and 8. Meaning and contents of history table described. Describe reason and change. Work flow picture added TW library owners names updated. Template description improved and selection added.
15	2014-12-03	All	Use of terms "Document workflow type" and "Document Type" clarified

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1 INTRODUCTION

1.1 Abbreviations

EKE	EKE-Electronics Ltd
TW	TeamWork document archive system used at EKE-Electronics
RD	Research and development at EKE-Electronics Ltd
QA	Quality Assurance

1.2 References

- /1/ Project File System, 2531.3.5.2.00805, EKE
- /2/ How to use AutoManager, 2531.3.5.2.00775, EKE
- /3/ Henkilöstön pätevyys, 2540.1.5.0.03532, EKE

1.3 Short summary for document workflow types 0 and 2

Document workflow type 1 shall not be used anymore. Use available document workflow type 0 or document workflow type 2 templates in TW.

While using document workflow type 0 or 2 templates all data on document's two first pages will be automatically updated.

Do not edit cover page or history table manually.

Type 0 document workflow

Create new document and write the document. Or open existing document for editing.

Update History table, using Changes-tab in Document Properties

Synchronize properties to file.

Release document in TW.

Document is ready

Type 2 document workflow

Create new document and write the document. Or open existing document for editing.

Save the file.

Author writes reason and description of changes, in Changes-tab of Document Properties.

Use command: "1 Start Review".

Author releases document manually in TW.

Decide who shall review and inform him/her/them. If review record is to be used then follow instructions in review record template.

Reviewer(s) review the document and give comments to author.

Author opens document for editing with start Change command, even if there are no comments. Document must be opened in Word.

Author updates document according to comments or if review record was used then according to review meeting decisions.

Save your file and close Word for this document.

Author writes reason and description of changes, in Changes-tab of Document Properties.

Author releases document manually.

Reviewer checks that document has been corrected as commented and as agreed.

If review record was used then checker opens review record for editing with start Change command and follows instructions in Review Record.

Author opens document for editing with start Change command, even if there are no comments.

Reviewer writes reason (reviewed and checked) in Changes-tab of Document Properties.

Reviewer uses command: "2 Accept Review".

Author releases document manually.

Approver uses command: "3 Approve Document". Document turns to Quick Change in TW.

Approver releases quick change in TW.

Document is ready.

2 DEFINITIONS

2.1 Date

Date indicates the last change (save) of the document.

Date is written using the following format: yyyy-mm-dd.

2.2 Document history

History table on the document is used for showing what has been changed since the previous version. Every major change in a document is recorded to the document history data. History data between two approved versions can be seen from the history data of all subsequent versions between these two versions.

2.3 Document Template

In order to ease the author's task several different document templates for various document types are available. When you create a new document in TeamWork the correct template shall be used according to given document type. If a template does not exist then the Word Long or Word Short template shall be used.

Type 0 and 2 are so called new templates. With these templates TeamWork automatically updates information on three first pages. All other templates are older and do not update automatically. With old templates document metadata needs to be updated manually by editing document properties.

2.3.1 How to find right template

The newest template should be used and first selection is between type 0 and type 2 templates.

Type 2 template is a template where first page has review and approval markings. Type 2 is used for all product related documentation. All product requirements, descriptions, test plans and test reports shall be written using type 2 template..

Type 0 template is a template where only name on first page is author's name. Type 0 is used for minutes, notes and informal documents.

EKE General docs contains valid Excel and Power Point templates.

Following groups contain valid old generation templates, Administration, Maintenance, Project, Quality and Sales – Marketing.

RD group does not contain any valid EKE templates.

Generic Document group does not contain any valid EKE templates. There are only generic Windows tool templates.

2.4 Remove template path from your document

In some cases TW Word document opening takes very long time. It can be seen that Word is trying to open an old template which does not exist anymore. For all such documents the wrong template path should be removed when that document is opened for updating. Template path should not be removed for any other documents.

If you have Word 2003:

Open document for editing. On command line select Tools / Templates and Add-Ins... On Templates tab you can see Document template path. Delete that path and click OK. Save changes and continue your work. Next time when you open this document you can see that Word has changed template path to EKE standard template normal.dot.

If you have Word 2007:

If not already visible then add Developer to your command tabs. Open "Customize quick access toolbar" – More commands. Select Popular and check box "Show Developer tab in the Ribbon". Open Developer tab and select Document template. On Templates tab you can see Document template path. Delete that path and click OK. Save changes and continue your work. Next time when you open this document you can see that Word has changed template path to EKE standard template normal.dot.

If you have Word 2010:

If not already visible then add Developer to your command tabs. Open File – Options - Customize Ribbon. Select Developer and click OK. Open Developer tab select Document template. On Templates tab you can see Document template path. Delete that path and click OK. Save changes and continue your work. Next time when you open this document you can see that Word has changed template path to EKE standard template normal.dot.

2.5 Identification

If you use document workflow type 0 or 2 templates then TeamWork builds document id automatically for you when you create the new document.

Each document must have a unique document ID. Document ID together with the version information makes a complete reference to a defined content of that document. It is the document author's task to compose the document ID according to the author's or document user's needs and contents of the document.

Document ID is formed of the following fields.

- Project
- Class (distribution)
- Archive time
- Document workflow type
- File name

Project – is a four digit project number.

Record of project numbers is maintained by EKE Administration. Project name may be used instead of project number if the number does not exist.

Class – is a one digit identifier for the sensitivity of contents. The most sensitive data in a document defines the distribution class.

- | | |
|---|--|
| 0 | distribution is free |
| 1 | distribution is inside the company and all customers |
| 2 | distribution is inside the company and one specific customer |
| 3 | distribution is inside the company |
| 4 | distribution is limited inside the company |

Archive time – in years after the latest version of the document is issued, or the contractual lifetime of a project is ceased, or a folder ceases to model company's business.

- | | |
|----|--|
| N | Number of years the document has to be retained, by minimum |
| 10 | ten years shall be the default value for any contractual or commercial correspondence not belonging into a project |
| F | as long as the folder storing the document is retained |
| P | long as the project owning the document is retained |

Note: By default, all project specific documentation shall be created with Archive time "P". Documents residing in the other branches of the TeamWork tree but "Projects", "F" shall be the default value.

Note: The expiration of the archive time does not automatically make the document obsolete. Obsolete documents shall be either disposed of, or otherwise clearly indicated being such.

Document workflow type defines the approval procedure.

- | | |
|---|------------------------------|
| 0 | no formal requirements |
| 2 | review and approval required |

File name is the document file name without the extension.

Example:

2854.2.10.2.00955 (say, a quotation)
9561.2.P.2.00031
9661.2.P.0.fax031103

2.6 Non Electronic Format Documents

Project manager defines handling and storing of project related documents, which are on other media.

Process owner defines handling and storing of process related documents, which are on other media.

Product Data Management process owner defines handling and storing of product related documents, which are on other media.

2.7 Record

Document stating results achieved or providing evidence of activities performed, ISO 9000 definition.

2.8 Reference

In your document, you can have a reference to another document. A reference is composed of document title, document id, possible version and the publisher. If the other document's version is not mentioned in your reference then your reference is to the latest version of that document.

Example:

Reference in text see /2/.

Reference in chapter References

/2/ Style Guide, 2855.0.5.0.word_long, EKE-Electronics Ltd

or

/2/ Style Guide
2855.0.5.0.word_long v9
EKE-Electronics Ltd

2.9 Review and approval

Adding the review and approval marks constitute the traceable evidence of the correct execution of the document creation and maintenance work flow. Reviewer and approver names shall be added by the person doing the step.

Should a need exist for a detailed review or approval report, such document may be created with the simple, no review requiring work flow. There is a review record template available in TW. On the first page the template contains instructions how to use it.

Document workflow type 2 templates shall be used for all documents listed below.

Document type	Author	Review	Approve

Process Description	Process owner	Other process owners	Quality Manager
Work Instruction	Anyone	Anyone except author	Quality Manager
Product documents	See RD QA plan	See RD QA plan	See RD QA plan
Project planning documents	Project Manager	Anyone except author	CPD Director
Other project documents	See Work instruction: Project File System	See Work instruction: Project File System	See Work instruction: Project File System
Sales quotation	Sales	Anyone except author	Process owner
Document for customer	Anyone	Anyone except author	Process owner

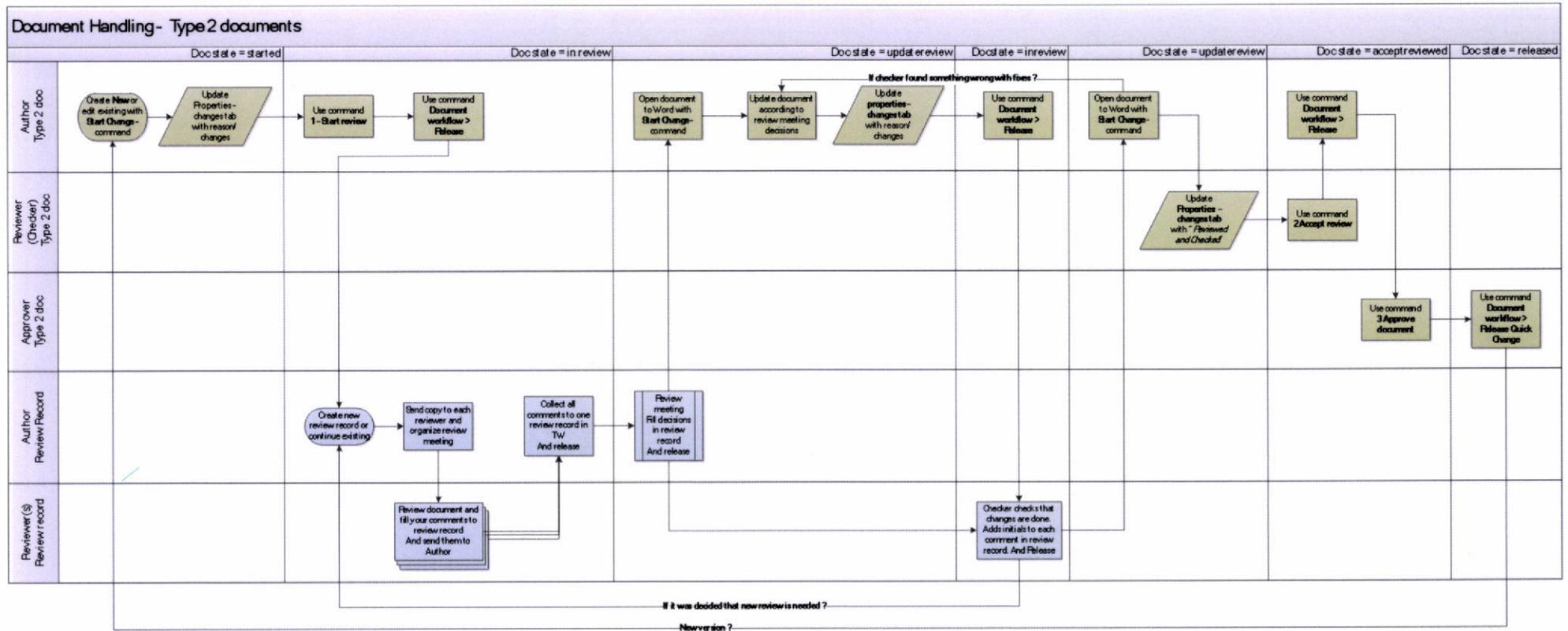
Table 1, Approval of documents

2.10 Status

Document status defines if the document contents are considered reliable and trusted. Only documents with status 'approved' can be reliable and trusted. If the document workflow type does not require formal approval, but requires a review, then the status 'reviewed' is considered reliable and trusted.

Document status can be seen from the first page. Status is "reviewed" if there are persons names on the author and reviewed fields. Status is approved if there are names on author, reviewed and approved fields on the first page.

3 TYPE 2 DOCUMENT WORK FLOW



3.1 Make a new document

While using document workflow type 0 or 2 templates all data on document's two first pages will be automatically updated. **Do not edit cover page or history table manually.**

Select the document workflow type 0 or 2 template according to the document you are writing and fill in the required data. Fields with a red triangle are mandatory. The data you fill in shall be automatically transferred to your document's first page.

Copy and paste chapter headings and possible contents to the template.

Do not use ctrl-a when copying. Instead **select text manually** from the first chapter heading to the end.

If you use ctrl-alt you'll break the template and mess the property values.

3.2 Update history table

Purpose of history table is to show all changes between versions. Author shall write the reason for change and what was changed. Special attention shall be paid to safety related issues. Reason may be review record mom reference, other mom reference, internal checking lists, safety checking list, change request etc.

Document properties window contains a tab named Changes. There you have a text box where you are supposed to fill in the text you want to put to the history table. This table must be updated for every version of a document.

Open the Changes tab. Click Edit on the right hand corner below the tab. Type in your text. Click OK when finished.

You may update this history text several times while writing your document. This text shall be moved to the document when you start review or release the document.

While the Changes text box is active, white in colour, **you may not open or close the document** which this text box belongs to. The document may be open or closed when you fill in history data.

3.3 Review

When author has finished document writing the document is ready for review. While author still has the document under change he/she clicks command 1 - Start Review. This command checks that the history table has been updated and after that the command releases the document. Reviewed document version cannot be changed anymore.

As an indicator about review the Reviewed field on the first page contains text **in review**. Author informs reviewers about the document. Reviewers read the document and give their comments to the author. He/she now opens the document under change and updates the document according to received comments.

When the document is updated and saved and the document is still under change for author he/she uses document workflow and changes the reviewer to be the author of this document. Original author informs the reviewer that the document review comments have

been updated. Reviewer checks the document and clicks command 2 Accept Review. This command checks that the history table has been updated and after that the command releases the document. Reviewed document version cannot be changed anymore. Name of the person who uses command 2 - Accept Review shall be written to the Reviewed field on the first page of the document.

3.4 Approve Document

After the document has been reviewed it shall be approved. This is done by selecting the document on TeamWork folder view and clicking command 3 - Approve Document. Name of the person who uses command 3 - Approve Document shall be written to the Approved field on the first page of the document.

3.5 Making Changes

Author can forward his/her document to another person for rework or making additions by using Change to-do person.

3.6 Printing

From environmental and economical reasons use always double sided printing. If text is readable you are encouraged to print two pages on one page and double sided.

3.7 Disposal

Document archive time is defined in document id. See chapter Identification in this document. After the archive period elapses the document may be deleted.

Disposal of all unnecessary printed paper copies of EKE documents with distribution class other than 0 must be performed using the paper disposal machine.

Disposal of customer's paper documents is performed according to what has been agreed between EKE and that customer.

4 SAVING YOUR WORK

All documents that are produced or received in electronic format are stored in electronic format in the electronic archives of the company. The basic idea is to have a similar structure in AM, in Outlook and in network servers.

4.1 IsaGraf applications

Project application storing is described in project plan.

4.2 E-mails

Work related public E-mails are stored using Outlook public folders. The folder structure is similar to the document tree structure that is defined for TW.

4.3 Software source codes

Handling of software source codes is controlled with document 'Software Version Configuration Management Plan' TBD.