

Total Quality System 9000 Family of Products

Linked File Instructions



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Linked File Instructions and Recommendations

Before beginning to link documents into your TQS-9000 product we strongly suggest that our customers identify how they wish to store their linked documents and which file formats will be used. If you have purchased a product with multiple user capabilities we suggest that all linked documents be stored on a network drive and in a folder that all users will have access to. If the documents are stored on an individual's workstation then other users will not have access to these documents when they are viewing the record. If you have a stand alone edition of one of the TQS-9000 products and will not have a need for others to view the documents you may create the linked file directories on this workstation.

ISP Software, Inc. recommends that you create the directories on your server that you will need prior to beginning to use your TQS-9000 product. Some of the considerations that you will need to address are:

Which folders should I create? We suggest creating separate directories for each type of records that you will be creating. For example you may wish to create directories for Quality Alerts, Practical Problem Solving Records, Gage Instructions, Work Instructions, etc. You may also wish to create subdirectories for many of these records. For example if you have several APQP projects with work instructions we would suggest creating a directory labeled "APQP" then creating sub-directories in the "APQP" directory for each APQP project.

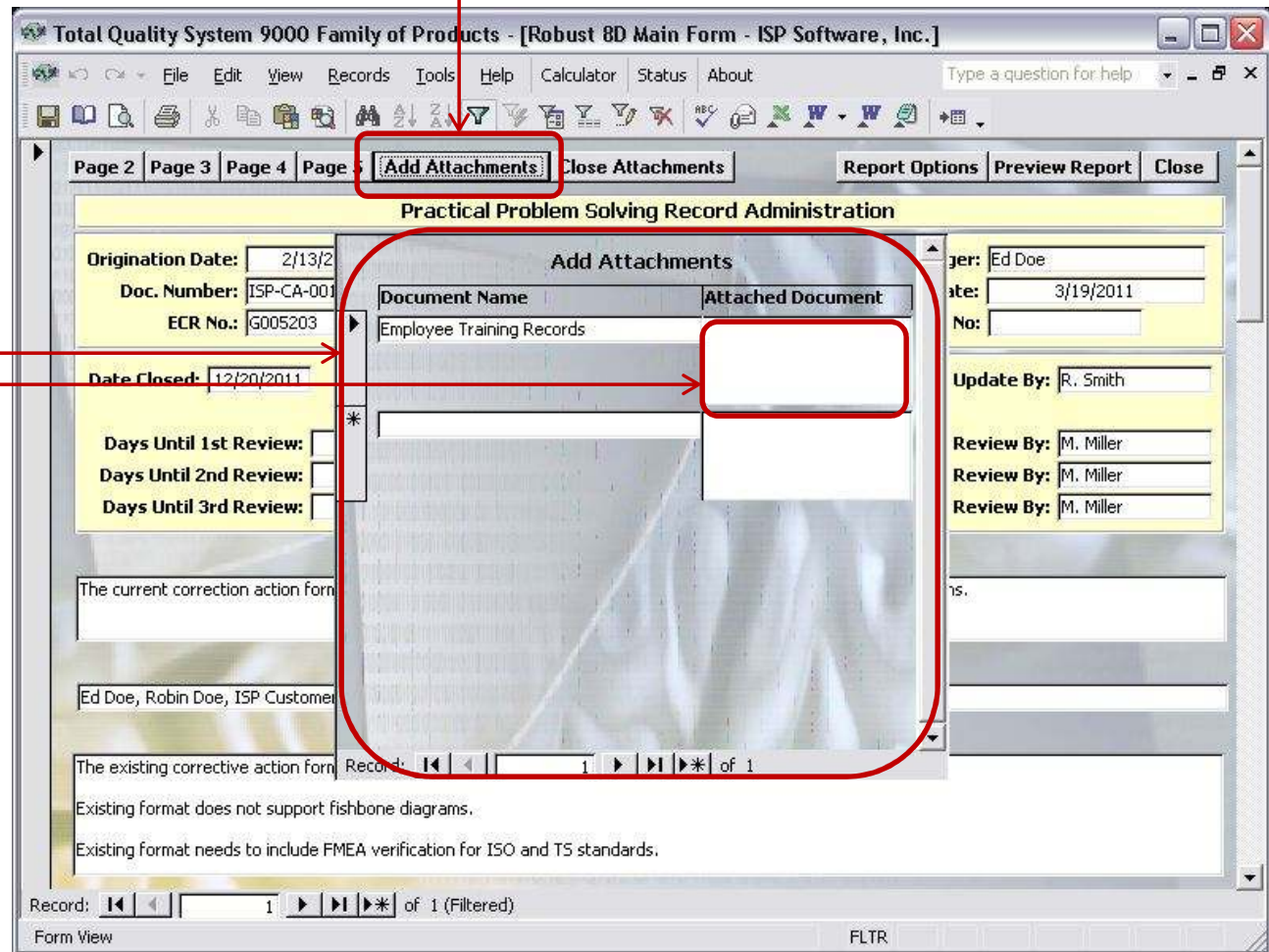
If you wish to discuss a rollout strategy or need additional information regarding creating directories for your TQS-9000 product installation, please contact an ISP Software, Inc. Solution Provider for assistance.

Several locations in your TQS-9000 product provide the capability to link in documents or add images to your documents. Some of these include the Practical Problem Solving form, Quality Alert form, Gage Calibration Instructions, Work Instructions, Supplier PPAP, and in the Linked Documents module. **It is important to understand the difference between embedding and linking documents into your TQS-9000 product.** Embedding a document will copy the document into your database and will only be available to the record that you embedded the document into. Embedding documents into your records will increase the size of your database and will not allow these documents to be shared with other records. Linking your files into your records will keep the size of your database much smaller and allow these documents to be shared in multiple records. By linking your documents into the database, if they are linked to more than one record when the linked file is changed or updated it will automatically update all records that it is associated to. **ISP Software, Inc. strongly recommends that the document linking feature be used over embedding your files.**

To begin using the linked document feature, open a record that has this feature available. In this example we have opened the Practical Problem Solving form and selected the "Add Attachments" option.

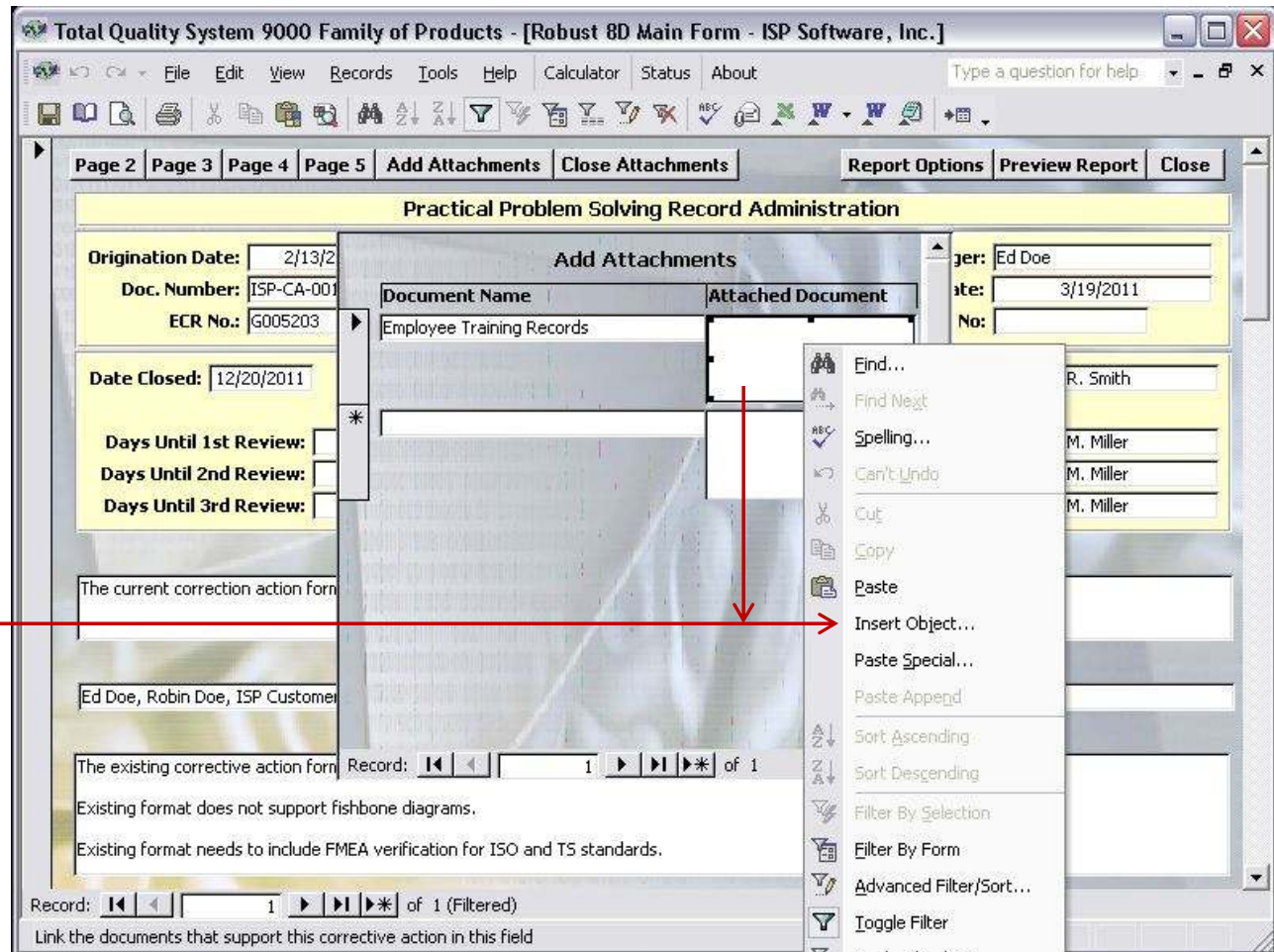
To link a document, use your mouse and right click in the blank area where the document is to be linked. In this example you would right click in the white area under the "Attached Document" header.

Once you right click in this area a drop down list of choices will be provided.



When you right click in the white area where the file is to be linked a drop down list will appear.

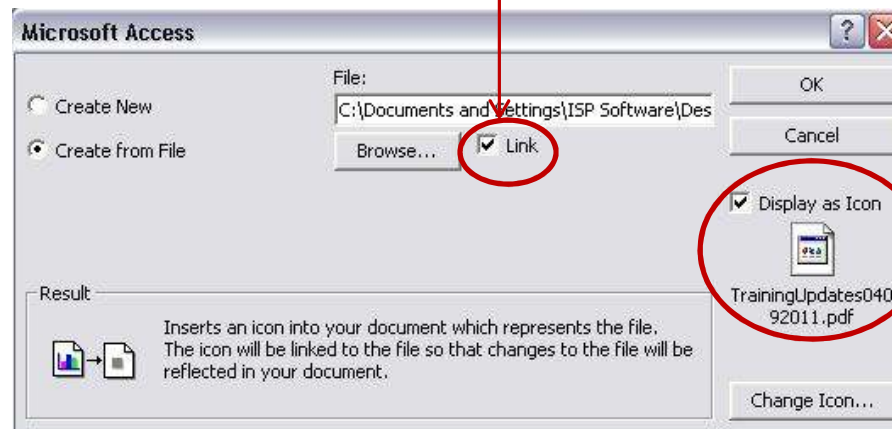
To link in your file select the "Insert Object" option from the drop down list.



Once you have clicked on the "Insert Object" from the drop down list a popup window will be presented where you may select the options. By default the "Create New" option will be selected.



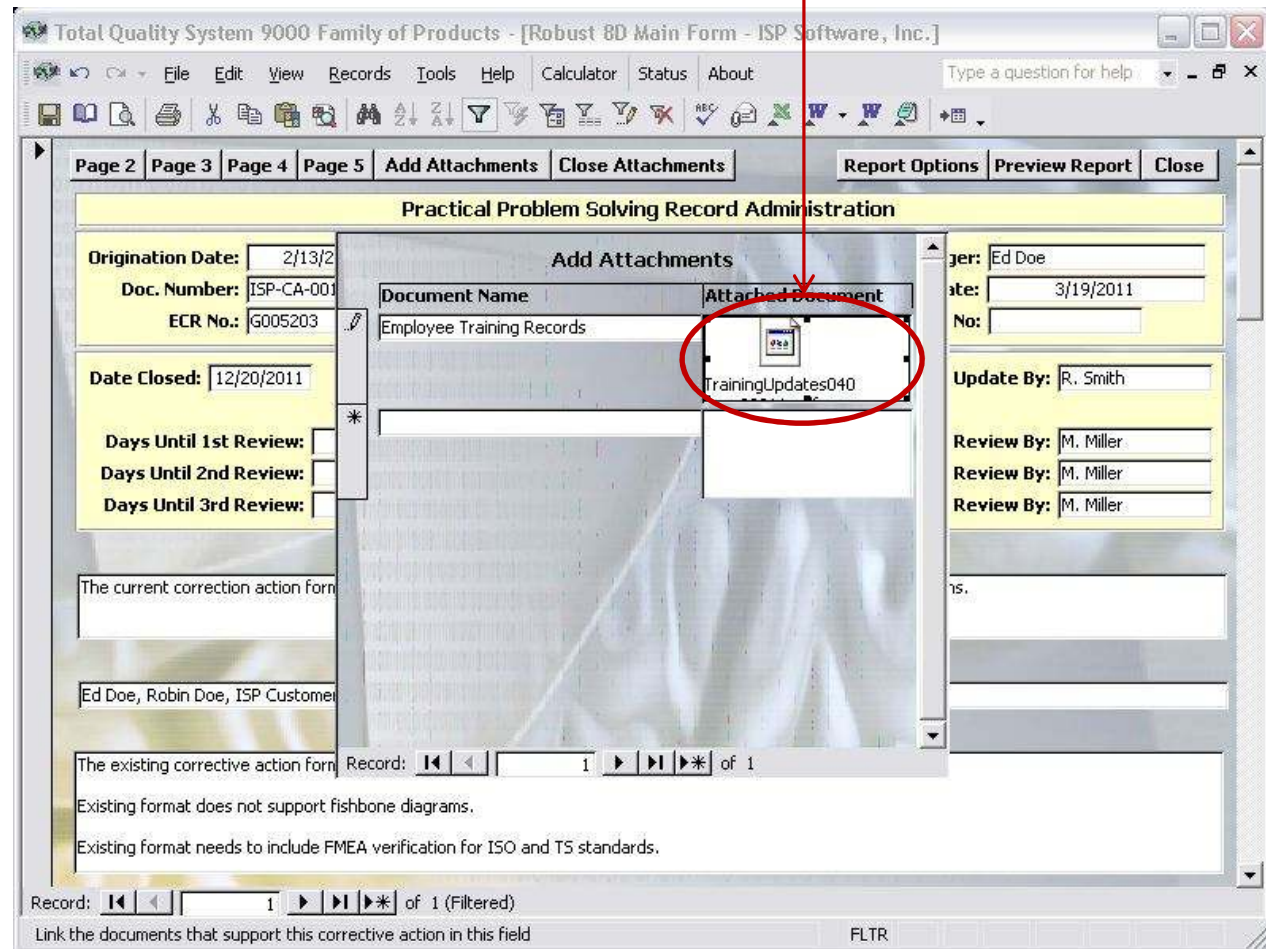
To link in your document change the default setting to "Create from File" and your popup window will change to allow you to browse to the location of the file you wish to link to your record. Browse to the file that you wish to link to your record then make sure to select the "Link" option under the file that you have selected.



We suggest leaving the "Display as Icon" setting selected if it is a linked in document. If you are linking in an image file we suggest unchecking this option so the file displays properly in your document. This would include work instructions, gage instructions, and other documents where the size of the linked image are indicated on your forms.

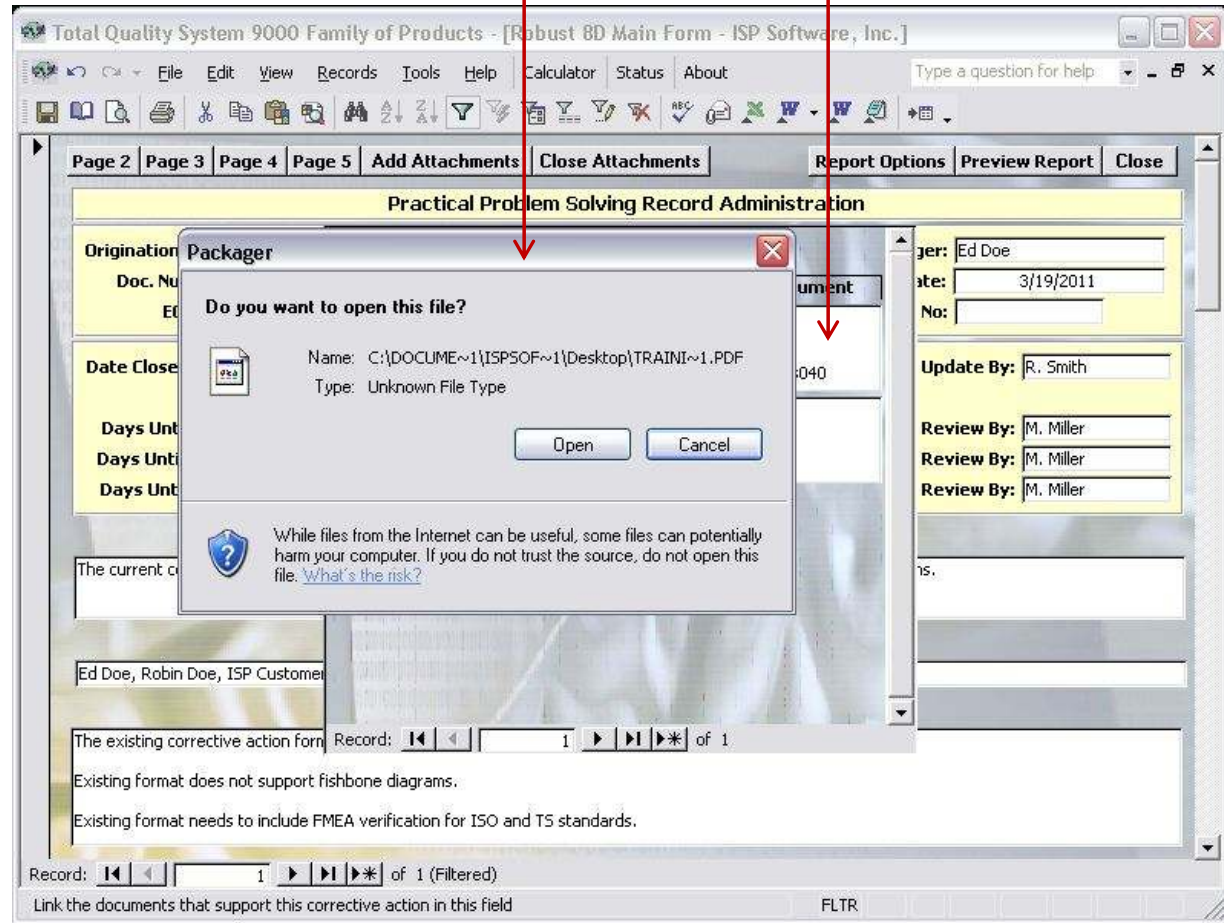
Once a document is linked into your record you should see the icon for the document in the box that you inserted the link into.

If the linked file has been saved on the network, all users will be able to access the document from you're their form.



Once your document is linked in you may double click on the icon to open the file. If the linked file is associated to a known file, the document will open. For example if you link in an Excel file and Excel is installed on the machine where you try to open the file, the file will open automatically.

If the linked in file is not associated to a program on the machine you may use the popup form to specify which program to use to open the file.



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