



MicroFile User's Manual

Version 1.4.1 for Windows XP/Vista/7/8

Welcome to MicroFile EDS

MicroFile is an advanced document management software package designed to work seamlessly with the Aerospac Online Database. Together, MicroFile and Aerospac offer powerful solutions for managing production and quality documentation throughout your entire supply chain.

MicroFile Features

- Scan, import, or download documents into a fully-featured searchable database.
- Build job packages automatically.
- Apply password-protected signatures and stamps.
- Share documents among multiple users.
- Upload documents to your customers, complete with searchable data—even if they don't have MicroFile.
- Back up and view your documents and data online.

Installation

Follow the instructions in your e-mail to install MicroFile initially. If you need to reinstall MicroFile, please contact support.

Access Code

The first time you run MicroFile, you will be prompted for an access code. This code changes daily and you will need to have a current one provided by support before you begin to use the software. If you do not enter an access code, your MicroFile database will be limited to the most recent 100 records.

Updates

Software updates are released periodically. You are entitled to the latest version of the MicroFile software as long as your service agreement is current. To check which version you are using, go to the Help menu and click About MicroFile. The latest version of the program will always be listed on the first page of this manual, which you can view at <http://www.aerospac.com/manual>.

Please direct any questions to:

Aerospac Support

E-Mail: support@aerospac.com

Phone: 949.678.9777



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Extra functionality not covered in other sections.

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MicroFile Basics

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Viewing data and documents

MicroFile EDS organizes its data records in the upper area of the screen, while the image associated with the selected record is shown below:

The screenshot shows the MicroFile EDS application window. At the top is a menu bar with File, Edit, View, Document, Scan, Options, and Help. Below the menu bar is a toolbar with various icons for file operations. A 'Sort By: Date_Time' dropdown menu and a 'Cancel Edit' button are also present. The main area is divided into two sections. The upper section contains a table with the following data:

Date/Time	PONumber	PartNumber	OrderNumber	LotNumber	DocumentType	TransmitTo	TransmitStatus
10/01/2012 16:57	73-17625			10037393	Material Certificati		Downloaded
10/01/2012 16:58	73-17624			10029374	Material Certificati		Downloaded
10/04/2012 08:41	88712	21-779			Certification	Aerospac	Transmitted
10/04/2012 08:45	Tw6365	BAC1537-48	396019		Certification	Systec	Waiting

The lower section displays a document preview for the selected record. The document is titled 'UNIVERSAL ALLOY CORPORATION' and 'EXTRUSION MILL CERTIFICATE OF CONFORMANCE INSPECTION AND TEST REPORT'. It includes the following information:

CUSTOMER: TMX AEROSPACE

PURCHASE ORDER: TW6365 ITEM 01/TZ732104-0067N **DATE:** 10/04/2012

ORDER NUMBER: 396019 **PART NO.:** BAC1537-48

SPECIFICATIONS: QQ-A-200/11 REV. E **MATERIAL:** 7010

MECHANICAL PROPERTIES

There are several icons at the top of the window to change your view of the image:

- Fit the image to the width of the screen.
- Show the entire image on the screen.
- Rotate the image.
- Page 1 of 3 View other pages in the image (if applicable).

If the image type is not supported by MicroFile, the lower portion of the window will appear as grey. If this happens, you can double-click the record to open the image using the default image viewer associated with that file type.

To rearrange the page order in a multi-page document, go to **Document -> View Page Thumbnails**. You can then click and drag the pages to change their location in the package.




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Searching and Editing

To search for a document, click this icon  or press CTRL-F. Type in the criteria you want to search by. MicroFile will then jump to the matching record.

A screenshot of a "Find" dialog box. It has a title bar with the word "Find" and a close button. The main area is a table with two columns: "Field" and "Search Value". The "Field" column lists various document fields: Date/time:, PO number:, Part number:, Order number:, Lot number:, Document type:, Transmit to:, Filename:, Source:, Document number:, and Company:. The "Search Value" column is empty. At the bottom, there are two buttons: "Find" and "Cancel".

Field	Search Value
Date/time:	
PO number:	
Part number:	
Order number:	
Lot number:	
Document type:	
Transmit to:	
Filename:	
Source:	
Document number:	
Company:	

To change the order of the displayed fields by clicking and dragging the field names left or right.

You can adjust the size of the database by clicking and dragging where the database meets the top of the image. This will also impact how much of the image you can see at once.

Click this icon  or press **CTRL-E** to toggle Edit Mode, which allows you to type into the database.



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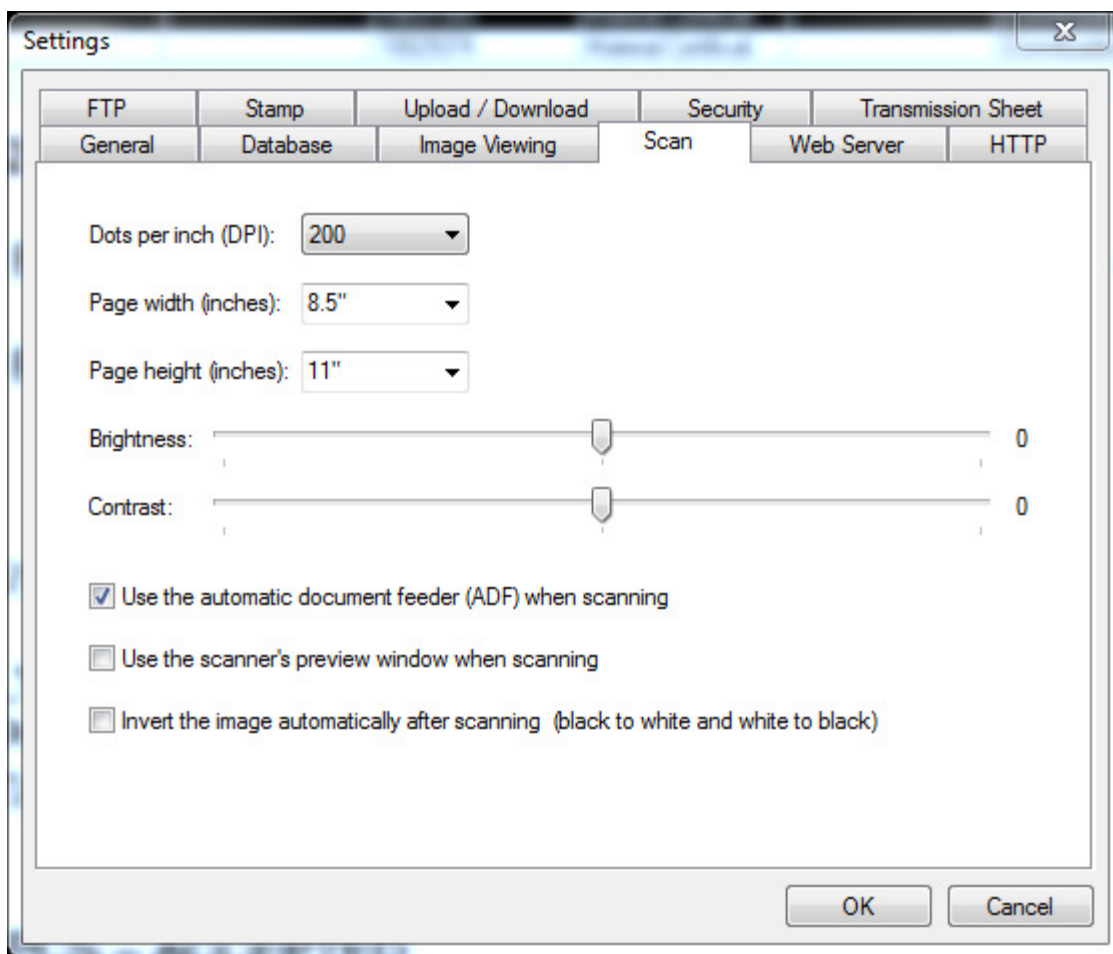
Scanning (F2)

Scanning allows you to convert paper documents into MicroFile electronic document packages. If you already have digital images available, or you wish to use an outside scan process, see **Importing** on page 6.

Before you scan your first document, go to **Scan -> Select Scanner**. Make sure your scanner is listed and highlighted, then click **Select**.

Go to **Scan -> New Document** or press **F2** to scan a new document package. Your scanner will scan all pages in its tray, and then a new record will appear in MicroFile database. You can now type in any relevant data directly into the new record.

Additional scan options are available by going to **Options -> Settings**, then clicking the **Scan** tab.



If you tick the box labeled *Use the scanner's preview window when scanning*, you will see an extra settings window the next time you scan a document, which is specific to your scanner. We recommend turning this on the first time you scan, and making sure that the scanner is set to scan black & white TIF images. This will ensure small image sizes which are ideal for storage and transmittal.



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Importing (Data in Filenames)

Importing allows you to add existing document images to MicroFile.

There are two import methods you can use. If the existing filenames of your imported documents contain meaningful data that you wish to be imported into the MicroFile database (e.g. *12-345.tif* where *12-345* is the part number for the document) follow the steps below. Otherwise, follow the import instructions on page 7.

Go to **File -> Add -> Import Document** or press **CTRL-M**.

Browse to the document image(s) you wish to import. Then, click the dropdown box labeled *Import image filename into this field* and select the field that matches the data contained in the filename. It is okay if the filename contains superfluous information, e.g. *Part-12-345.tif* or *12-345 Jan 2013.tif* as this will not prevent you from finding the correct data in a search. If all other settings (Destination Company, etc.) are correct, click Import. Your documents will import with the selected data field populated. You will still need to fill in any additional data that you or your customer need the document indexed by.



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Importing (Generic Filenames)

MicroFile will automatically import all images in a designated folder into MicroFile. Follow the steps below to get started:

Create or identify a folder in Windows that you will use for this purpose. This should either be an empty folder or one that already has images in it which you wish to import into MicroFile. This folder should be used for no other purpose.

Go to **Options -> Settings**. Next to *Printed document path*, browse to the folder you designated earlier, then click OK.

From now on MicroFile will monitor the folder you chose. Any time an image is placed in that folder, MicroFile will create a new record and move the image to the *Primary document path* listed in **Options -> Settings, Database** tab. Thus, the only images that will ever be in the *Printed document path* are the ones that are waiting to be imported into MicroFile.

You can now enter data for your new records by clicking the  icon, or pressing **CTRL-E**.




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Downloading

MicroFile is integrated with the Aerospac Online Database, and can therefore download documents from your suppliers as well as upload them to your customers.

To download documents, click this icon  or go to **File -> Download New Documents**. The MicroFile database will now populate with all documents and data that have been sent to you by your customers.

If you only want to download documents in a particular date range, or if you need to re-download documents, go to **Options -> Settings, Upload/Download** tab, then fill in the beginning and ending dates to download in MM/DD/YYYY format. Click OK and your next download will use the range you provided.


Your customers can be set up to upload documents to you via our online portal* (no software required) by visiting <https://www.aerospac.com/RequestAccount/> and filling out the form on the page. Make sure they are instructed to fill in the name of your company (not theirs) in the first field so they are able to send to you.

*Please check your service agreement to see if this service is included. An upgraded service agreement may be required.



Uploading (F3 or F5)

MicroFile can upload documents to customers, or to your own company as an offsite backup. Select the document you wish to upload, set the TransmitStatus to *Waiting*, then set the *TransmitTo* field to the name of your customer, or your own company name if you are backing up the document online. Then, go to **File -> Upload Current Document** or press **F3**. After the upload is complete, you should get a message that says Successful Upload, and the TransmitStatus field should change to Transmitted.

To upload *all* documents that have a TransmitStatus of *Waiting*, click this icon  or press **F5**. Depending on the number of documents pending, this may take several minutes.

If your *TransmitTo* list is missing a customer, or if your own company name isn't available and you wish to back up your documents online, e-mail support@aerospac.com. Your customer can receive Aerospac documents even if they don't have MicroFile; they can either use their browser to visit the Aerospac Online Database, or be set up to receive your documents via e-mail.



Document Sharing

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Networking

You may install MicroFile on multiple PCs and share the same database across all of them. Follow the steps below to get started:

Install the latest version of MicroFile and enter the access code on all PCs. Go to **Options -> Access Code** to confirm the software has been activated on each PC.

The default database location is **C:\Users\User\Documents\MicroFile\Microfile.mdb**

The default images location is **C:\Users\User\Documents\MicroFile\Docs**

Move these files to a location on your network where you'd like them to be stored.

On each PC running MicroFile, go to **Options -> Settings, Database** tab and change the *Primary document path* to the folder where you are storing your images on the network, and the *MicroFile Database* location to the folder where you are storing Microfile.mdb. Restart the software.

You are now sharing your MicroFile database among multiple PCs. All users can scan, import, search, view, and upload documents concurrently. We recommend a single user be designated for uploading as it is possible for duplicates to be created if multiple users upload at the same time.




Job Package Building

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Building Job Packages Automatically

To begin building a new job package, start by scanning and indexing a Material Test Report in MicroFile.

Click this icon  or press CTRL-F to search for the Material Test Report. Once you have it selected, allocate it to a job by pressing CTRL-J. In the pop-up window, type the job number into the *Order number* field and click Save.

This will create a new record with a copy of the Material Test Report, indexed by the job number you entered.

To add a process cert to a job package, place it in your scanner and go to **Scan -> Append Matching Documents** or press F8. Type the job number into the *Order number* field and click Scan. The process cert will scan and be added as a new page to the Material Test Report you scanned earlier. You can continue to do this with multiple process certs as you continue to build your job package.

To add a certificate of conformance to your job package, follow the same steps for adding a process cert, but use **Scan -> Insert Into Matching Documents** or press F9 to scan the document. This will make the C of C the first page of the document package, making it ready to print or upload.



Backup & Maintenance

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Backing Up your Database and Images

Your database and document images are stored locally. Follow the instructions below to create a local backup of both. To back your data up to the cloud using Aerospac Cloud Sync, see page 12.

To find where your files are stored, go to **Options -> Settings, Database** tab. The *Primary Document Path* field shows where your images are stored, and the *Microfile Database* field shows where your database is stored. You can now back these files up in Windows.

A screenshot of the "Settings" dialog box in MicroFile, with the "Database" tab selected. The dialog has a title bar with "Settings" and a close button. It contains several tabs: "FTP", "Stamp", "Upload / Download", "Security", "Transmission Sheet", "General", "Database", "Image Viewing", "Scan", "Web Server", and "HTTP". The "Database" tab is active, showing a checkbox for "Use the document path(s) specified on this computer instead of the document path(s) specified in the current database. If unsure, leave this option unchecked." Below this are six text fields for document paths, with the "Primary Document Path" field containing "C:\Users\Support\Documents\MicroFile\Docs\". Below the paths is a checked checkbox for "Connect directly to a MicroFile MS Access database (recommended if using the default database)". Below this is a text field for the "MicroFile Database" containing "C:\Users\Support\Documents\MicroFile\Microfile.mdb". At the bottom, there is a note: "These values can only be changed in the Extended Version of MicroFile." and "OK" and "Cancel" buttons.

You can also back up your documents using Aerospac Cloud Sync. (Next page)



Backup & Maintenance

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Aerospac Cloud Sync (Backup)

Aerospac Cloud Sync is a premium service which will automatically back up your MicroFile documents to the cloud for easy recovery later. Before using this feature, you will need to contact Aerospac Support to have it set up for your account.

To turn on Aerospac Cloud sync, go to **Options -> Settings, Upload / Download** tab and tick the box labeled *Enable Aerospac Cloud Sync*.

☒ Enable Aerospac Cloud Sync (last run 02/11/2013 13:44)

Once you have turned on this feature, MicroFile will periodically back up your documents to the cloud. Documents must meet the following criteria before they will be backed up:

- TransmitStatus must be set to *None*. If the TransmitStatus is *Waiting*, then MicroFile expects that you are going to upload the document yourself. When you upload a document, it will be backed up.
- At least one field (e.g. PO Number, Part Number) must be filled in with data.
- The document must be at least one hour old. This is to give the user a reasonable period of time to finish entering data before the automatic backup takes place.

Once an hour, MicroFile will check its database and back up all documents which meet the above criteria. A bubble notification will appear in the bottom right corner of your screen to indicate this is taking place. You will be able to continue working with MicroFile while the backup is running.

Documents which have been backed up via Aerospac Cloud Sync will have their TransmitStatus changed to *Synced/Transmitted*.



Aerospac Cloud Sync (Recovery)

In the event of a partial or complete loss of local data, go to **File -> Recover Missing Documents**. MicroFile will compare its database against the online backup and download any missing records. Recovered documents will have a TransmitStatus of *Synced/Downloaded*.

You will not be able to use MicroFile during the recovery. If you are recovering a large number of documents, it may take a very long time to complete this process.



Backup & Maintenance

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Compact & Repair your Database

MicroFile has a built-in compact and repair utility. Compacting a very large database can improve performance, while repairing can fix a database if it becomes corrupted.

Before running a compact or repair operation, ensure that no other copies of MicroFile that are networked to this database are open, then back up your database.

Go to **Options -> Database Maintenance**, browse to your database location, then click the Compact button. You will be prompted once the Compact operation is finished. If necessary, you can then click Repair to attempt to repair the database if it has become corrupted.



Add Database Fields

To add custom database fields to your MicroFile database, such as Alloy or Specification. Go to **Options -> Add Database Field**, enter the name of the field you wish to add, then click Add Field. Your new field will now be listed in the MicroFile. You will not be able to change the name of this field, or delete it, unless you edit the database table in Microsoft Access.

A screenshot of the "Add Database Field" dialog box. The dialog has a title bar with the text "Add Database Field" and a close button. Inside, there is a text area with an important notice: "IMPORTANT: There is currently no MicroFile option to modify a database field or remove a database field. This may be added in a future release, but for now you will need to use Microsoft Access to modify or remove database fields." Below this, instructions state: "Enter the name of the new field to add to the database." followed by two bullet points: "- must begin with a letter" and "- use only letters, numbers, and underscore". There is a text input field for the field name. Below the input field, there are two sections: "Select the field type" with a dropdown menu currently showing "Text (1 to 255 chars)", and "Maximum text length" with a text input field showing "50". At the bottom of the dialog are two buttons: "Add Field" and "Cancel".



Signatures, Stamps, and Notes

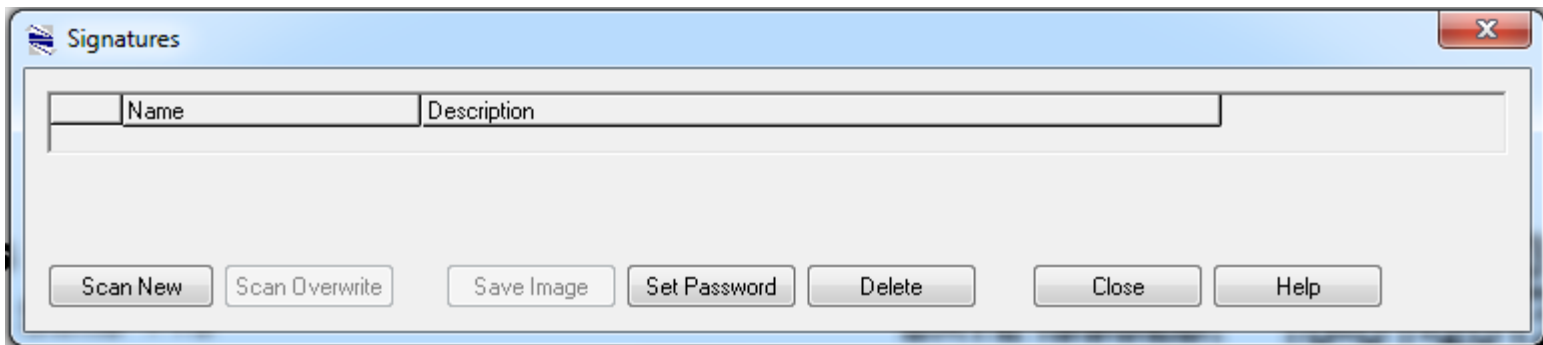
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Apply Signatures & Stamps

Signatures and stamps can only be added to MicroFile by connecting a scanner directly to the PC running MicroFile. If you have not done so already, ensure the correct scanner is set up by going to **Scan -> Select Scanner**. Make sure your scanner is listed and highlighted, then click **Select**.

Go to **Options -> Signatures** to open the Signatures window. This will show a list of any existing signatures/stamps. To scan a new one, click the Scan New button.



Once your signature or stamp has been scanned, you should set a password. This will help ensure that signed documents are approved by the person who matches the signature.

To apply a signature or stamp to an existing document, locate the document you wish to approve, then go to **Document -> Add Signature** or press CTRL-G. You can click and drag to move the signature or stamp to any place on the document, and use the 'plus' and 'minus' keys to resize it. Click the Save button in the pop-up window to permanently add the signature or stamp to the document.



Add text to a document

To add text to a document, locate the document you wish to add text to, then go to **Document -> Add Text** or press CTRL-H. Type in the text you wish to add, then click OK. You can click and drag to move the text to any place on the document, and use the 'plus' and 'minus' keys to resize it. Click the Save button in the pop-up window to permanently add the text to the document.



Additional Features

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Proxy Server Settings

If your company requires use of a proxy server to upload data, go to **Options -> Settings, HTTP** tab and enter the appropriate settings.

HTTP Upload URL:

Proxy server (firewall) name:

Proxy server username:

Proxy server password:



Multiple Monitor Viewing

You can take advantage of multiple monitor configurations by separating the document viewing window from the database. To do so, click and drag the double vertical grey lines on the left side of the document viewing area, and move it to the right until it snaps outside of the MicroFile window. You can now move the document window to your second monitor.



Automatic Upload/Download

To set MicroFile to automatically upload and/or download documents on a daily schedule, go to **Options -> Settings, Upload/Download** tab.

Automatic Upload / Download

Enter a time (hh:mm) in the fields below to schedule an automatic document upload and/or download once a day. Leave a field blank to disable that option.

Automatic upload time:

Automatic download time:

If either of these fields is occupied, MicroFile will automatically attempt to upload all waiting documents, and/or download all new documents from the Aerospac Online Database.




Printing Transmission Sheets

A transmission sheet is a document which lists the document data, recipient, and a note that states that the document has been uploaded to Aerospac. Many companies find this useful to include with the packing slip in shipment to show that the required documentation is available online.

To set up MicroFile to automatically print transmission sheets when uploading documents, go to **Options -> Settings, Transmission Sheet** tab and tick the box labeled *Print a transmission sheet for each document that is uploaded*. You will see a standard printer prompt the next time you upload a document. You can click Cancel at the prompt to skip the transmission sheet on any upload.

Custom Document Types

The DocumentType field is controlled by a dropdown list. You can customize the list by going to **Options -> Document Types**.

	Document Type
	Certification
	Invoice
	Material Certification
	Production Traveler
	Purchase Order
	Quotation
*	

Close

Delete

You can type in custom names for new document types, or delete existing ones.



Additional Features

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Using Order Number for Filenames

MicroFile can automatically name your image files based on the Order Number (job number) field. This can be useful if you need to use the images outside of MicroFile, as you will still be able to look them up by job number.

Go to **Options -> Settings** and tick the box labeled Use Order Number for Filename to turn this feature on. This will not retroactively affect previously indexed documents. From now on, as soon as anything is entered in the OrderNumber field, the image filename will be changed to match it. If this would create a duplicate, the filename will be appended with _1.tif, _2.tif, etc.



Document Notes

Document notes do not appear in the database, but can be edited or viewed by selecting a document record, then going to **Edit -> Notes** to open the notes window. Here you can type any relevant notes for the document. These notes will stay in MicroFile and will not be sent to Aerospac if the document is uploaded.

Please direct any questions to:

Aerospac Support

E-Mail: support@aerospac.com

Phone: 949.678.9777