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# General

## Purpose of the guideline

This guideline describes how to fill data fields in the template documents for projects with help of an excel table as a data source.

The input of the project-specific data in the excel table must be done only once (see point 2.1). Then, all project documents, e.g. acceptance protocol, can be filled with these data if data fields are contained. All project documents with data fields are in the path TQM\_Supplier\_Package\TQM\_documents (See chapter 1.4 Documents with field functions)

and the excel table is in the path TQM\_Supplier\_Package\General documents.

## Scope

This guideline applies to suppliers who use the project template documents with data fields.

(see document list in chapter 1.4)

## Related documents

* Excel table as data source: [QMA-formheader-project.xls](file:///P:/_Mustervorlage_NeuerKunde/_Mustervorlage_NeueAnlage/Projektnummer_Projektname/D_Vorlagen/QMA-Formularkopf-Projekt.xls)
* Templates with data fields (data fields are identifiable by the signs << >>)

## Documents with field functions

List of the template for the project documents with data fields:

QMA\_B\_0503\_Minutes\_of\_the\_training\_EN

QMA\_C\_0904\_Change\_request\_form\_EN

QMA\_C\_1003\_Minutes\_of\_the\_FAT\_EN

QMA\_C\_1005\_Minutes\_of\_a\_meeting\_EN

QMA\_C\_1014\_Technical\_Design\_EN

QMA\_C\_1015\_general\_concept\_plant\_software

QMA\_C\_1017\_fine\_concept\_plant\_software\_EN

QMA\_C\_1018\_FDS\_Acceptance\_EN

QMA\_C\_1023\_CHK\_project\_clarification\_phase\_EN

QMA\_C\_1024\_CHK\_program\_test\_sequence\_EN

QMA\_C\_1025\_CHK\_module\_test\_EN

QMA\_C\_1026\_CHK\_integration\_test\_EN

QMA\_C\_1029\_test\_protocol\_GAMP\_PLS\_EN

QMA\_C\_1038\_General\_test\_protocol\_EN

QMA\_C\_1209\_Acceptance\_procedure\_protocol\_EN

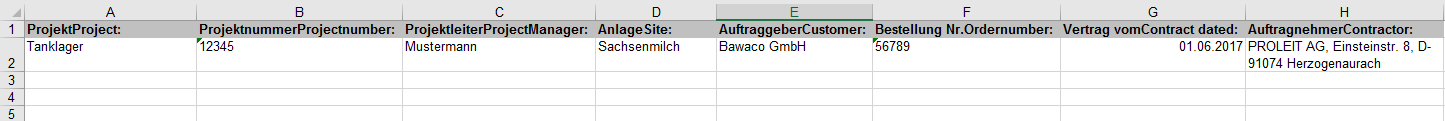
QMA\_C\_1210\_CHK\_Before\_returning\_from\_plant\_EN

QMA\_C\_1211\_Report\_completion\_commissioning\_EN

# Using field function

## Fill datas in excel table

1. Open excel tabelle in the template folder (QMA-formheader-project.xls)
2. Enter the following project specific datas (see order data aXc):
   1. Name of project
   2. Projectnumber
   3. Project Manager
   4. Site
   5. Customer
   6. Ordernumber
   7. Date of contract
   8. Contractor (preset cell with ProLeiT GmbH)
3. Save list in the respective project folder - using templates folder
4. Close excel table

Example:

**Important:**

Don’t rename the first line (highlighted in grey)! The column names in the table must be conformed with the names of the fields. These are the default values.

## Fill datas in documents

|  |  |
| --- | --- |
| 1. Open the template document with data fields (data fields are identifiable by the signs << >>) |  |
| 1. Select tab „Mailings“ 2. Click on „Select Recipients“ 3. Select „Use an Existing List“ |  |

|  |  |
| --- | --- |
| 1. Change to prepared excel list |  |
| 1. Select excel table |  |
| 1. Select „Preview Results“ |  |
| 1. Preview of different projects ofis possible |  |

## Save documents

|  |  |
| --- | --- |
| 1. Select „Finish & Merge“ |  |
| 1. Select „Edit Individual Documents...“ |  |
| 1. Select „Current record“.   Confirm with „ok“ |  |
| 1. Save completed document | The document can be saved in any folder. |
| 1. Save different projects 2. Finished | 12. If different project datas were registered, it can be saved in different folders as of point 8.  13. By selecting the arrow keys, the desired document can be chosen. |