

# Save As Functions

## Comparing Xspec® 3.1 to Xspec® 4.0

**W**henever you create or change a specification, template, or boiler plate (available in Xspec 4.0 only), you need to save the changes. Whenever you save a document, the Xspec program marks in the document history the date, time, your name, and the exact saving action (for example, a normal save function or a reissue function).

In Xspec 3.1, you choose between four different saving options. These options are:

| Saving Option        | Description   |
|----------------------|---|
| Save                 | Normal save function. You use this option when you are saving a document with a status level lower than <i>Approved</i> . The system saves the document with the same system ID.  |
| Save As New Document | Used only with an <i>Approved</i> specification. You use the Save as New Document option to copy the document to make a similar but new product. The system assigns a new system ID to the document and changes the status to the lowest status type.   |
| Save as New Version  | Used only with an <i>Approved</i> specification. You use the Save as New Version option when there are minor changes between two products. For example, you can have two versions of a Butter specification, one that contains more salt than the other. The system assigns a new system ID and version number to the document. |
| Save as Reissue      | Used only with an <i>Approved</i> specification. You use the reissue option to correct minor errors in the specification (such as typos) that do not require routing and approval.  |

A document can only be routed once in Xspec version 3.1. The document can only have a few status levels - Under Development, Approved/Disapproved, and Obsolete. Once a document has been through these status levels, you have no choice but to save the document as a new document. In Xspec version 4.0 however, there are several new status levels a document can go through. Also, you can create drafts of documents. As a result, a document in Xspec 4.0 has a much longer life cycle than a document in version 3.1. Many new saving features have been added to Xspec 4.0 that do not exist in 3.1. Also, many of the Save As features in 3.1 are no longer necessary in version 4.0.

## How It Works in Xspec 4.0!!!

Xspec has been enhanced to enable documents to have a longer life cycle. A life cycle of a document starts at the creation of the document, goes through the routing and approval procedures, and ends when the document is obsolete and deleted. In the past, Xspec allowed a document to go through one routing cycle. Now, a specification can go through several levels of routing. As a result, saving functions have changed. In past versions there was a Save As function that enabled you to save a document as a reissued document, as a new version, or as a new document. The Save As function has been replaced by functions such as Copy. The saving options available in Xspec 4.0 include the following:

| Saving Option    | Description   |
|------------------|---|
| Save             | Normal save function. You use this option when you are saving a document with a status level lower than <i>Approved</i> . The system saves the document with the same system ID. Same as in version 3.1.  |
| Reissue          | Used only with an <i>Approved</i> specification. You use the reissue option to correct minor errors in the specification (such as typos) that do not require routing and approval. Same as the Save As Reissue option in version 3.1.   |
| Create by Copy   | Used with any document status level. The Create by Copy option enables you to copy a document to create a similar but new product. The system assigns a new system ID to the document and changes the status to the lowest status type. Same as the Save As New Document option in version 3.1.   |
| Next Version     | Used only with an <i>Approved</i> specification. You use the Next Version option when there are minor changes between two products. For example, you can have two versions of a Butter specification, one that contains more salt than the other. The system assigns a new system ID and version number to the document. Same as the Save As New Version option in version 3.1. |
| Create New Draft | Used with any document status level. You use the Create New Draft option to correct major errors in a specification which require routing and approval. This save option is available in Xspec version 4.0 only.  |
| New Item Number  | Used with any document status level. You use the New Item Number option in order to copy a specification but keep the same status level. The system assigns a new system ID to the document <i>but</i> retains the same status level. This save option is available in Xspec version 4.0 only.  |
| Revert to Draft  | Used with any document status level. You use the Revert to Draft option to move the specification status level one step backwards. This save option is available in Xspec version 4.0 only.   |

## Using New and Changed Save Options

The Save and Reissue options work exactly the same as in Xspec version 3.1.

However, the 3.1 Save As New Document option has been replaced with the Create by Copy option. You copy a document to make a similar but new product. You can use the copy option for a document of any status. Choose the *Actions* menu from the Xspec menu bar, then choose *Create by Copy*. The system displays the Save As screen (figure 1).

Enter the document number in the Item ID field and click on the *OK* button. The Save As screen closes. The system assigns a new system ID to the document and changes the status to the lowest status type. The system records the creation of the new document in the history of the original. The original document remains unchanged.

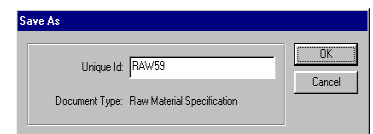


Figure 1

You can save your modifications to the original document as a new draft. You use the New Draft option to correct major errors in a specification which require routing and approval. You can use the new draft option for a document of any status. Choose the *Action* menu from the Xspec menu bar, then choose *Create New Draft*. The system displays the Reason For Change screen (figure 2). Enter the reason for the new draft then click on the *OK* button. The Reason For Change screen closes. The system assigns a new draft number and a new system ID to the document. The document retains the same unique ID but changes the status to the lowest status type. The system records the creation of the new document in the history of the original. The original document remains unchanged.

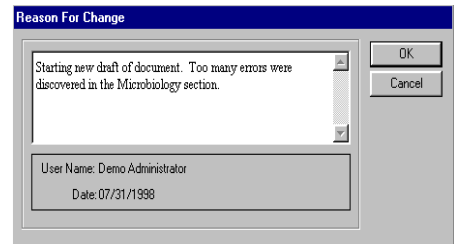


Figure 2

You use the create a new version option when there are minor changes between two products. For example, your company can have two versions of a Butter specification, one that contains more salt than the other. You must have at least create access for the document and status type. You can only use the new version option with an *Approved* document. Choose *Number* from your right mouse button menu. The system displays the Number Specification screen (figure 3). Click on the *Next Version Number* option button, then click on the *OK* button. The Number Specification screen closes. The system assigns a new system ID and a version number to the document. Each time a new version is created, the system increases the version number by one. The system changes the status to the lowest status type. The original document remains unchanged. The system records the creation of the new version in the history of the original document.

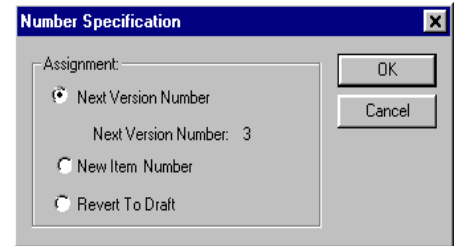


Figure 3

You can use the Assign New Item Number option in order to copy a specification but keep the same status. The document will only have a new item and system ID. Choose *Number* from your right mouse button menu. The system displays the Number Specification screen (figure 4). Click on the *New Item Number* option button, then click on the *OK* button. The Number Specification screen closes, and the system displays the Save As screen (figure 5). Enter the new item ID, then click on the *OK* button. The Save As screen closes. The system assigns a new system ID to the document and keeps the same status. The system records the creation of the new document in the history of the original. The original document remains unchanged.

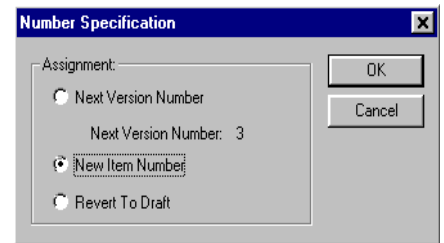


Figure 4

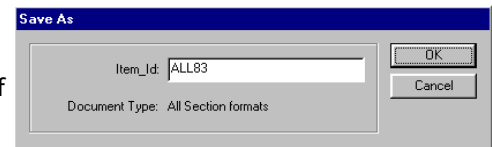


Figure 5

You can use the Revert to Draft option in order to move the specification status level one step backwards. Choose *Number* from your right mouse button menu. The system displays the Number Specification screen (figure 6). Click on the *Revert To Draft* option button, then click on the *OK* button. The Number Specification screen closes. The system reverts the document to a draft.

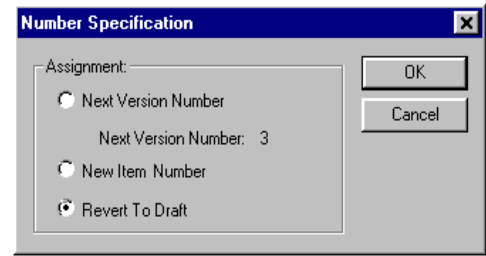


Figure 6

## How Do I Get More Information?

If you would like more information on Xspec version 3.1 or 4.0, please contact your IMAS sales representative at 800-977-3248.



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