opentext™

OpenText™ Core for Capital Projects Administration

Online Help

This administration online help describes features that Administrator can configure in Core for Capital Projects solution.

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OpenText™ Core for Capital Projects Administration
Online Help

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Chapter 1

Adding CCP users in Admin Center

1.1 Adding users in Admin Center

Perform the following steps to add new users to the Core for Capital Projects application:

1. Log in to **Admin Center CCP Tenant URL** from the **Manage Site** link in your **You've been added...** invitation email that was sent after creating the CCP tenant.

   You must log in with **CCP Site Admin or SE Site Admin** credentials.

2. Navigate to **General > Subscriptions**.
3. Select the subscription to which you want to add users.
4. Select **Users** in User management.
5. Click ⊕ to add a new user. For example, type **abc@opentext.com** as the user email.

   You can repeat this process for adding additional users.

   The account status must be active in order to add the users to the subscription groups. Each added user will receive an email with a link to the application. The user must click the link to activate the account.

1.2 Inviting multiple users to a subscription

If you want to invite multiple users to a subscription at the same time, you can upload a `.csv` file to import the users you want to invite.

You must first create a `.csv` file that contains information about each user you want to import. For more information, see “Creating a .csv file to import users” on page 8.

You can then upload that file in Admin Center to import the users. After you upload the file, Admin Center sends an invitation to each user specified within the file.

To invite multiple users to a subscription at the same time:

1. Open a subscription, and then click **Users** on the navigation menu.
2. Click **Import users**.
3. Click **Choose .csv file** and select the `.csv` file you created.
4. Click **Add users** to start the import process.

5. When the import process is complete, click **Finish**.

Notes

- If you close the dialog box while the import process is in progress, the process continues in the background until it is complete. In this scenario, you can click the **Import users** button to check the progress of the import process.
- If errors occur during the import process, you can click **Download error report** to download a `.csv` file that provides more information about the errors.

1.2.1 Creating a .csv file to import users

Before importing users to Admin Center, you must create a `.csv` file that contains information about each user you want to invite.

In each row, you must specify a user's first name, last name, and email address in the first, second, and third columns respectively.

If you want to assign app roles to a user, you can also specify one or more app roles in the fourth column. If you specify multiple app roles, use a semi-colon (`;`) to separate each app role. Otherwise, leave the fourth column blank if you do not want to assign app roles to a user.

Example 1-1:

If you create the `.csv` file in Microsoft Excel, you must specify the column values in the following order and format:

`John`	`Doe`	`johndoe@company.com`	`Developer`
`Jane`	`Doe`	`janedoe@company.com`	`Tester`
`Anne`	`Smith`	`asmith@company.com`	`Tester`
`Tom`	`Brown`	`tbrown@company.com`	`Developer; Tester`

Notes

- You can optionally provide column headings in the first row of the `.csv` file. If you choose not to provide column headings, Admin Center processes the first row as user information.
- The size of the `.csv` file must not exceed 5 MB.
- You can only upload UTF-8 encoded `.csv` files. When you create your `.csv` file, ensure that the file is saved in the UTF-8 format.

1.3 Removing a user from a subscription

Perform the following to remove a user from a subscription:

1. Open a subscription and then click **Users** on the navigation menu.
2. Click the **More options** ⋮ button in the row that corresponds to the user you want to remove and select **Remove user**.
3. When prompted to remove the user, click **Remove from role**.

1.4 Adding subscription admins to Supplier Exchange

Perform the following steps to add a new subscription admin to Supplier Exchange:

1. Log in to the **Admin Center Supplier Exchange Tenant URL** from the **Manage Site** link in your **You've been added...** invitation email that was sent after creating the Supplier Exchange tenant.
2. Navigate to **Subscriptions**.
3. Select **Admins** in User management.
4. Click ⊕ to add a new subscription admin.
5. Type the required email ID.
6. Click **Invite**.

Chapter 2

Migrating project configs

In Core for Capital Projects, whenever you want to move the existing configurations, you can use the export or import options. Export configuration moves the existing configurations to a configured download folder. Later, you can import these configurations to a newly deployed Core for Capital Projects environment.

2.1 Exporting project configuration

1. Log in to the **Core for Capital Projects Admin** interface with configuration manager credentials. The user must be part of the owner group.
2. Navigate to the **Project Configs** and select any of the existing configurations that you want to export.

   Note: You can select a maximum of 3 projects for export.

3. Select **File** > **Export Configuration**.
4. In the **Export Configuration** dialog box, you can view the selected configurations.
5. Click **OK**.

   The exported zip file is placed in the browser configured downloads folder.

Note: Logos, Labels, and Groups are not exported during this operation. Export functional groups and users and export custom labels are not supported in Core for Capital Projects.

2.2 Importing project configuration

1. Log in to the **Core for Capital Projects Admin** interface with configuration manager credentials. The user must be part of the owner group.
2. Navigate to the **Project Configs**.
3. On the **Project Configs** page, select **File > Import Configuration**.
4. In the **Import Configuration** dialog box, click **Choose File**.
5. Navigate to the folder where the configurations are placed.
6. Select the master ZIP folder.
7. Click **Import Project(s)**.

When you import project configurations, Core for Capital Projects also creates Project Groups for the newly imported project configs. But, you must create required roles in the project groups.

Note: Only Project configurations are imported and no projects will be created during the import process. Import functional groups and users and import custom labels are not supported in Core for Capital Projects.

Chapter 3

Getting started

OpenText™ Core for Capital Projects is part of the OpenText™ Energy and Engineering Solution Suite. It is a complete information management solution that enables secure document control and project team collaboration. As a cloud based, configurable solution, Core for Capital Projects accelerates deployment schedules and eliminates the need for custom programming. The solution streamlines the transmittal process by automating the import, internal review, and external distribution of controlled documents to multiple parties. The multi-level progress tracking features include dashboards and reports that help track project deliverables and progress milestones, and accurately report on the project status and cost.

The Energy and Engineering Solution Suite enables those enterprises who design, construct, operate and maintain large plants and facilities to effectively manage unstructured content and transform the way they use information, including technical documentation and related business processes.

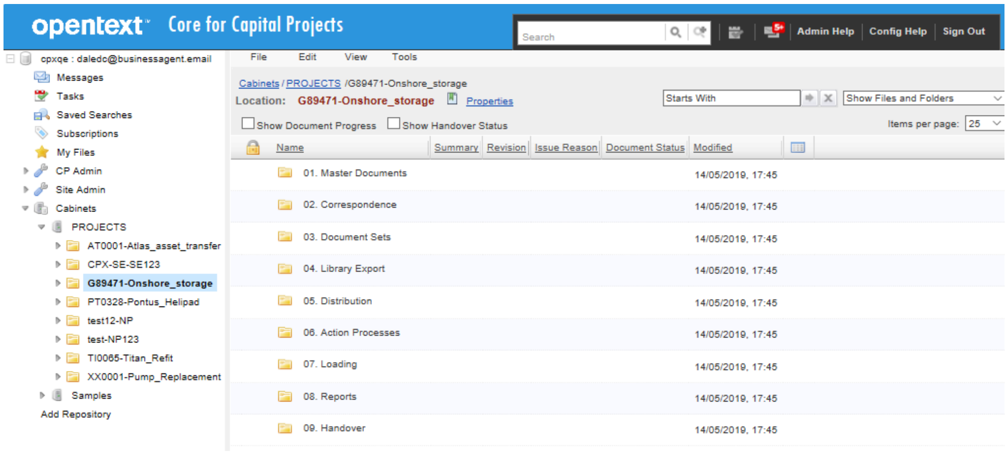
The Solution Suite also includes the OpenText Documentum Asset Operations Solution, the OpenText Supplier Exchange Solution and the Extended ECM for Engineering Solution. The Core for Capital Projects Solution focuses on the cloud based information management requirements for engineering design and construction project activities. Organizations are able to reduce business and operational risk, speed time to project completion and ensure compliance with industry regulations.

This Quick Reference Guide is designed to provide easy-to-use support for getting the best out of the Core for Capital Projects solution.

For online training resources, visit http://otadocs.opentext.com/mylearn/index.htm

For more product information, visit http://documentum.opentext.com/industries/energy-and-engineering/

The following diagram illustrate the Core for Capital Projects Admin home screen:


opentext™ Core for Capital Projects
Search
Admin Help
Config Help
Sign Out
cpxqe : daledc@businessagent.email
Messages
Tasks
Saved Searches
Subscriptions
My Files
CP Admin
Site Admin
Cabinets
PROJECTS
AT0001-Atlas_asset_transfer
CPX-SE-SE123
G89471-Onshore_storage
PT0328-Pontus_Helipad
test12-NP
test-NP123
TI0065-Titan_Refit
XX0001-Pump_Replacement
Samples
Add Repository
File
Edit
View
Tools
Cabinets / PROJECTS /G89471-Onshore_storage
Location: G89471-Onshore_storage
Properties
Starts With
Show Files and Folders
☐ Show Document Progress
☐ Show Handover Status
Items per page: 25
Name
Summary
Revision
Issue Reason
Document Status
Modified
01. Master Documents 14/05/2019, 17:45
02. Correspondence 14/05/2019, 17:45
03. Document Sets 14/05/2019, 17:45
04. Library Export 14/05/2019, 17:45
05. Distribution 14/05/2019, 17:45
06. Action Processes 14/05/2019, 17:45
07. Loading 14/05/2019, 17:45
08. Reports 14/05/2019, 17:45
09. Handover 14/05/2019, 17:45

Note: You should use the Core for Capital Projects interface for non-admin activities such as managing documents, transmittals, and review or approval processes.

3.1 Using browser extension-based content transfer mechanism

The browser extension-based content transfer mechanism supports content transfer operations in Webtop without using Java applets. This is applicable only for the Internet Explorer, Firefox, and Chrome browsers.

Content transfer mechanism consists of two components:

- Content transfer browser extension: For each supported browser, there is a corresponding browser extension component. These extensions are a thin pass-through layer that allows the web page of a product to communicate with an external native application.
- Native client application: This is a Java-based application and requires a supported JRE running on the client machine. The native client application is responsible for transferring content between the local file system and the application server using UCF.

3.2 Installing browser extension and native client application

Perform the following tasks in your respective browsers for Core for Capital Projects Administration application.

3.2.1 Installing in Internet Explorer

Ensure the following prerequisites are met on the client machine:

- Install a supported JDK version.
- Ensure that you install Microsoft .NET 4.5 or later. By default, Windows 8.1 and 10 has Microsoft .NET 4.5.
- Ensure that you have administrator privileges to install Browser Helper Object (BHO).
- If pop-up blocker is enabled, ensure that the Webtop URL is listed in the Exceptions list of pop-up blocker settings.
- Disable the **Enable Protected Mode** option in **Internet Options > Security > Local intranet**.
- Add the Webtop URL to Local intranet in **Internet Options > Security > Local intranet > Sites**.
- Enable the **Enable third-party browser extensions** option in **Internet Options > Advanced > Browsing**.
- Enable the **Automatically detect intranet network** option in all zones in **Internet Options > Security > Local intranet > Sites**.
- Disable the Display intranet sites in Compatibility View and Use Microsoft compatibility lists options.

Perform the following:

Note: If **EMC Documentum Webtop Browser Helper Object** is already installed, you must uninstall by using **Add/Remove Programs** in Control Panel. You must have administrator privileges to uninstall.

1. Launch Internet Explorer and log in to Webtop.
2. When prompted to install the content transfer browser extension, click **Install**.
3. Click **Run** and install BHO.
4. After the installation, click **Tools > Manage add-ons**.
5. Verify the status of **OpenText Documentum Webtop Helper Object**. If the status is not enabled, enable it manually.
6. Restart the browser and log in to Webtop.
7. If prompted to Install native client, click **Install**.

8. Click **Run** and install the native client application.
9. Restart the browser and log in to Webtop. You can now perform all the content transfer operations.

3.2.2 Installing in Firefox

Ensure the following prerequisites are met on the client machine:

- Install a supported JDK version.
- If pop-up blocker is enabled, ensure that the Webtop URL is listed in the **Exceptions** list of pop-up blocker settings.

Perform the following:

1. Launch Firefox and log in to Webtop.
2. When prompted to install the content transfer browser extension, click **Install**.
3. When prompted that you are prevented from installing the content transfer browser extension, click **Allow** and then click **Install**.
4. Restart the browser and log in to Webtop.
5. When prompted to install the native client application, click **Save File**, click on the saved file prompt, and click **OK** once the installation is complete.
6. Restart the browser and log in to Webtop.

   You can now perform all the content transfer operations.

3.2.3 Installing in Chrome

Ensure the following prerequisites are met on the client machine:

- Install a supported JDK version.
- If pop-up blocker is enabled, ensure that the Webtop URL is listed in the Exceptions list of pop-up blocker settings.
- Have access to Chrome store to install the content transfer browser extension.

Perform the following:

1. Launch Chrome and log in to Webtop.
2. When prompted to install the content transfer browser extension, click **Install**.
3. In the **OpenText Documentum Client Manager** dialog, click **ADD TO CHROME** and then click **Add extension**.
4. Close the dialog once you are prompted that the extension has been added.
5. Restart or refresh the browser and log in to Webtop.
6. If prompted to install native client, Click **Install** to download the **NativeSetup.exe** file.

7. Navigate to the downloads folder, install the native client application, and click **OK** after the installation is complete.
8. Restart or refresh the browser and log in to Webtop. You can now perform all the content transfer operations.

3.2.4 Locating the installation and log files

After the installation of content transfer browser extension and native client application, if no browser extension installation prompt appears in subsequent usage of Webtop application, installation is successful.

Internet Explorer, Firefox, and Chrome:

- Installation location: `C:\Users\<UserName>\AppData\Local\OpenText\ContentXfer\com.documentum.wdk.native\1`
- Log location:`C:\Users\<UserName>\Documentum\Logs\WDKNative`
- Registry entry location:`HKEY_CURRENT_USER\SOFTWARE\Opentext\Webtop\NativeSetup`

  Here, you can locate the values for Path and Version.

Chapter 4

Creating a new project

The following table provides the details of the tasks that can be done in Core for Capital Projects Admin and Core for Capital Projects interfaces:

Core for Capital Projects Admin	Core for Capital Projects
	Transmittal Creation
	Processes Creation
	Document Creation
	Adding Performers using a distribution matrix
	Apply a distribution matrix to a document
Creating a Distribution Matrix – Importing, Adding Columns, Adding Rows, Editing Rows, Adding Conditions.	
Creating a Bulk Loading Spreadsheet	
Creating Handover Package	
Creating a Report Template	
Import and Reply to a Correspondence	
Creating a new Project	
Creating a new folder (Holding Folder)	Creating a new folder – This feature will work only if the project is auto filed in Core for Capital Projects Admin interface. Else, the newly created document will be placed in the same folder.
Modifying Access to Documents	
Document Status – Perform these steps in Core for Capital Projects Admin when you have more than one document.	Document Review and Approval

Core for Capital Projects Admin	Core for Capital Projects
Bulk Loading – Creating a Bulk Upload Spreadsheet, Importing content files to a Loading folder, Creating a Bulk Upload Spreadsheet, Adding Renditions to Existing Documents, Adding Multiple Renditions, Defining Matching Rules, Validating a Bulk Upload Spreadsheet, Resolving Bulk Upload Spreadsheet Errors, Importing a Bulk Upload Spreadsheet, Adding Content to a Placeholder (Bulk Upload), Loading a Bulk Upload Spreadsheet, and Bulk Load Value Assistance.	Document Revision

4.1 Managing configuration managers

You can add or remove the configuration manager using the **Configuration Managers** node from the **CP Admin** node.

1. Browse to the **CP Admin** > **Configuration Managers** folder.
2. Click an existing configuration manager.
3. Select **File** > **Add Member(s)**.
4. Click **All Members**.
5. Select the relevant user and click the right arrow to add the user.
6. Click **OK**.

4.2 Managing users and groups

You can manage user and group updates using the **Project Groups** or **Functional groups** nodes from **CP Admin** node.

4.2.1 Managing project group

You can add or remove users and groups as members of a `project group`.

1. Browse to the **CP Admin** > **Project Groups** folder.
2. Double-click on an existing project group.
3. Double-click on the project’s controller, contributor or consumer group.
4. Select **File** > **Add Member(s)**.
5. Click **All Members**.
6. Select the relevant user/group in the left pane and click the right arrow to add the user/group to the right pane. Click **OK**.

4.2.2 Managing UCF users

Unified Client Facilities (UCF) is a lightweight client framework used to view, import, export, check in, and check out files. From Core for Capital Projects 20.2 release onwards, the UCF feature is not enabled by default. If you want to enable this feature, you must add the user to the UCF Users role. You can add or remove users as members of the UCF Users role.

1. Browse to the **CP Admin** > **UCF Users** folder.
2. Select **File** > **Add Member(s)**.
3. Click **All Members**.
4. Select the relevant user/group and click the right arrow to add the user/group.

   Click **OK**. The newly added user can perform any UCF tasks.

Note: The newly added UCF user can perform UCF tasks only after 15 minutes.

4.2.3 Managing functional groups

User with configuration manager role can create a new functional group or delete an existing functional group. In addition, can add or remove users as members to a functional group.

1. Browse to the **CP Admin** > **Functional Groups** folder.
2. Select **File** > **New** > **New Functional Group**.
3. In **Create New Functional Group** dialog, type the **Group Name** and **Group Description**.
4. Click **OK**.
5. To add members to the functional group, Select **File** > **Add Member (s)**
6. Type the first few characters of the surname, or the group name, **Starts with**.
7. Press **Enter** or click **Search by Name**.
8. Select the relevant user/group in the left pane and click the right arrow to add the user/group to the right pane. Click **OK**.

4.3 Creating folders

1. Select the folder in the navigation pane for which you want to create a subfolder, for example, navigate to the `Cabinets` > `Projects` > *`<project name>`* > `01.Master Documents` folder.
2. Select **File** > **New** > **Folder**.
3. Type a name for the folder.
4. Select the **Folder Type**.
5. Select the **Folder Template**.
6. Click **Next**.
7. In the **Info** tab, if required update the content rules.

   The descriptions of the content rules are:

   - **Inherit parent containment rules**: Specifies that the folder inherits the containment rules of the parent folder. If this option is selected, the system ignores the containment rules defined for the folder and applies the containment roles of the parent folder.
   - **Specific document types**: Defines the document types that users can create in the folder.
   - **Specific subfolder types**: Defines the folder types that users can create in the folder.
   - **Configuration object types**: Defines the specific configuration types, such as numbering configuration, auto attribute, and population configuration, that users can create in the folder
   - **Stop create new document for roles**: Specifies the roles that cannot create new documents in the folder.
   - **Stop create new folders for roles**: Specifies the roles that cannot create folders inside the folder.
8. Click **Finish**.

4.4 Setting area logo

Perfrom the following to set a new logo for the newly created projects or area:

1. Browse to the **Cabinets** > **PROJECTS** folder.
2. Select a project.
3. In **Tools** menu, select **Actions**.
4. In **Available Actions**, click **set area logo**.
5. For **Set/Update area logo**, click **Browse** to select the required logo to updated for the selected area.
6. Select a suitable logo of size 150 pts X 150 pts.
7. Click **Perform Action**. You can view the newly added logo in the Core for Capital Projects interface.

Note: Repeat these steps again if you want to update the existing logo.

4.5 Project cleanup

1. Log in with configuration manager credentials.
2. Navigate to the **Cabinets** > **PROJECTS** folder.
3. In the **PROJECTS** pane, select an appropriate project.
4. Right-click and select **Delete** or Navigate to **File** and select **Delete**.

   Note: You must always delete the projects (area) first and then delete the respective project configs. All Project Groups are deleted when you delete Project Configs.

   Select one of the following option:

Option	Description
Delete folder and content	Select this option to delete the folder and its contents.
Delete contents only	Select this option to delete only the contents.
Do not delete	This option is selected by default when you delete a project or project configs when the folder contains documents, transmittals, or processes. Further the **Delete folder and content** and **Delete contents only** options are disabled by default.

Option	Description
Delete link only	This option is not applicable for this release.

5. Select **Delete folder and content**.

   Note: When you delete a project that contains documents or transmittals, or processes, then the Core for Capital Projects application throws validation message and the project is not deleted.

6. Click **Review Deletion**. The name of the folder that will be deleted is displayed.
7. Click **Proceed with Deletion**.
8. Click **Close**.

Deleting project configs

1. Navigate to **Project Configs**.
2. In the **Project Configs** pane, select an equivalent project config.
3. Right-click and select **Delete** or Navigate to **File** and select **Delete**.
4. In the **Delete Folders** dialog box, select **Delete folder and content**.
5. Click **Review Deletion**. The name of the project config folder that will be deleted is displayed.
6. Click **Proceed with Deletion**.

   The project config and the associated project groups are deleted. The references to this project in OT2 and REST are also deleted. After this action, if required you can use the same project name to create a new project.

Note: When a project is deleted, user messages and tasks associated with the project are not deleted.

Chapter 5

Document management

Document Management is one of the vital capabilities that Core for Capital Projects offers. To work with document management effectively, you need to be logged in to the required project within the Core for Capital Projects application.

This chapter contains the following topics:

5.1 Creating a document

1. Browse to the `Projects/`*`<project_name>`*`/01.Master Documents` folder.
2. Navigate to the folder in which you want to create a document.
3. Select **File** > **New** > **Document**.
4. In the **Create** tab, enter a name for the document.
5. Select a document type, document template, and lifecycle state.
6. Click **Next**.
7. Select a revision for the document from the **Revision** drop-down list.
8. Specify a title and an alternative document number.
9. Select an issue reason from the drop-down list.
10. Click **Next**.
11. In the **Content** tab, click **Next**.
12. In the **Membership** tab, add the required roles for the document. "Modifying access to documents" on page 30 provides detailed information.
13. Click **Finish**.

5.2 Importing a document

1. Browse to the folder from where you want to import a document.
2. Select **File** > **Import**.
3. Click **Add Files**.
4. Browse and select the document you want to import. Click **OK**.
5. Click **Next**.
6. Select **Document Type**.

   Note: The screen refreshes each time you select a different type and this may take a couple of seconds.

   The document types available depend on the folder to which you are importing the document. Each folder has a `Content Rule` that defines the types of documents you create in that folder.
7. Type the mandatory properties for the new document.
8. Click **Finish**.

5.3 Holding folders

Creating a new folder

1. Log in to the Core for Capital projects application.
2. Navigate to the <*project name*>/**01.Master documents** > **00.Holding Folders** folder.
3. Click **File** > **New** > **Folder**.
4. Specify a name for the folder.
5. Click **Next**.
6. In the **Info** tab, enter the required details.
7. Click **Next**.
8. In the **Membership** tab, add the required roles for the document. “Modifying access to documents” on page 30 contains detailed information.
9. Click **Finish**.

Creating a new document

1. Log in to the Core for Capital Projects application.
2. Navigate to the <*project name*>/**01.Master documents** > **00.Holding Folders** folder.

3. Click **File** > **New** > **Document**.
4. Specify a name for the document.
5. Click **Next**.
6. In the **Info** tab, enter the required details.
7. Click **Next**.
8. In the **Documents** tab, click ✚.
    - To add from the master documents folder, click **Browse**.
    - To add from the documents within the current project, click **List**.
    - To add from the the loading sheet, click **From Loadings**.
9. In the **Membership** tab, add the required roles for the document. "Modifying access to documents" on page 30 contains detailed information.
10. Click **Finish**.

5.4 Creating document from another document

This procedure details the process to copy the content to a new document from an existing document. It does not copy the properties, metadata, or the renditions associated with the document.

1. Select a document that has primary content.
2. Click **File** > **New** > **Document – Copy Content**.

    Note: The **Document – Copy Content** menu item is available, only if you have read access on the document.

3. In the **Create** tab, enter a name for the document.

    Note: If the document is not auto-numbered, the **Name** field is enabled.

4. Click the **New Location** link to change the default location of the new document. You can select any location within any project to store your new document.
5. Select the document type and the document template from the corresponding list boxes.
6. Select a lifecycle state for the document from the list box.
7. Select the **Delete Existing Document** check box to delete the original document.

    Note: The check box is available if you have permissions to delete the document and there are no validation errors on the document.

8. Click **Next**.

9. In the **Info** tab, enter the required details. The details vary according to the document type you select.
10. Click **Finish**.

5.5 Viewing a rendition

1. Right-click the document and select **Content**.

   The **Properties** dialog box appears with the **Content** tab selected.
2. Click **View** next to the rendition you want to open.

5.6 Viewing document properties

1. Browse to the folder that contains the documents.
2. Right-click the document and select **Properties**.
3. Click a tab to view properties.

   The property values depend on the document type. For example, **Correspondence Document**, the property values include **To** and **From**; For an **Internal Deliverable Document**, the property values include the **Document Number**.

5.7 Viewing document revisions

1. Right-click the document and select **View** > **Revisions**.
2. Click **Close** to return to the folder (or click the folder in the navigation pane).

5.8 Viewing document versions

1. Browse to the folder that contains the documents.
2. Right-click the required document and select **View** > **Versions**.

5.9 Adding a rendition manually

The Core for Capital Projects solution automatically generates renditions. You can also add them manually. You cannot add a rendition to a document if the status is set to **Placeholder**.

1. Right-click the document and select **Content**.
2. Click **Add Document Rendition**.
3. Select a name for the rendition from the list box.
4. Click **Browse**.
5. Select the document you want to add as a rendition and click **Open**.

6. Click **OK**.

   Your rendition is added to the **Content** tab of the document.

7. Click **OK**.

5.10 Creating a document revision

You can add a new revision only if the status of the document is set to **Latest**. If the new revision is to include an updated version of the content, then, first create and save the content locally (outside of Capital Projects).

1. Right-click the document and select **Actions**.
2. Click **Create new revision**.
3. Type the mandatory attributes for the new revision.
4. To add a content file:
   a. Click **Browse** next to the **New Content** field.
   b. Browse and select the document. Click **OK**.
5. Click **Perform Action & Close**.

   The status of the new revision is set to **Being Prepared** and the status of the previous revision is set to **Latest (Under Revision)**.

5.11 Modifying the document content

1. Right-click the document and select **Edit**.
2. Perform the changes to the document.
3. Save and close the document.
4. Right-click the document and select **Check In**.
5. Select the version you want to create.
6. Change the other properties, if relevant, and click **OK**.

   A new version of the document is created.

7. To modify properties:
   a. Right-click the document and select **Properties**.
   b. Change the required properties and click **OK**.

5.12 Modifying access to documents

1. Right-click the document and select **Properties**.
2. Click **Membership**.

   The roles and their current membership are displayed.
3. Click **Change Membership**.
4. Double-click **All ecs users group**.
5. Type the first few characters name of the user name in the **Starts with** and press **Enter**.
6. Select the required user in the left pane and then click the right arrow next to the role you want to add the user. Repeat this step to add more users, if required.

   To remove someone from a role, select the user in the right pane and then click the left arrow to remove.
7. Click **OK** to save your changes.
8. Click **OK** to close the **Properties** dialog box.

5.13 Removing a rendition

1. Right-click the document and select **Content**.
2. Select the rendition you want to remove and click **Remove**.

5.14 Document status

5.14.1 Setting the initial status of a document

- To set the status when creating a document, use the **Lifecycle State** list box.
- To set the status when importing a document, set the **Document Status** using the list box.
- To set the status for a bulk upload, type the status in the **Document Status** column.

5.14.2 Changing the status of a document

You can change the status of document to depending on the type of document and its current status.

1. Right-click the document and click **Actions**.
2. Select the action to change the document to the required status.
3. Click **Perform Action & Close**.

5.14.3 Cancelling a document

1. Select a document.
2. Right-click and select **Actions**.
3. Click **Mark as cancelled**.
4. Click **Perform Action & Close**.

5.14.4 Superseding a document

1. Select a document that you want to be superseded.
2. Right-click and select **Actions**.
3. Select **Mark as superseded**.
4. Type the name or the document number of the superseding document.
5. Click **Perform Action & Close**.

5.15 Document sets

This chapter contains the following topics:

5.15.1 Creating a document set

1. Log in to the Core for Capital Projects application.
2. Navigate to the <*project name*>/**03 Document Sets** folder.
3. Click **File** > **New** > **Document Set**. The **New Document: Info** screen appears.
4. Specify a name for the document.
5. Select the **Document Type** and **Document Template** and click **Next**.
6. In the Info tab, set the Title if required and click **Edit** to edit the **Version Label**. Selecting the option Show all properties shows all the available properties that you can set for the document set that you are creating. Make the required updates and click **Next**.

7. In the **Documents** tab, click ✚ to open the **Choose an item** page.
8. To add a document from:
    - The master documents folder, click **Browse**.
    - The list of documents within the current project, click **List**.
    - The loading sheet, click **From Loadings**.
9. Navigate to the required document.
10. Select the document and click **Ok** to include the document. Click **Next** to go to the Membership tab or click **Finish** to add the required documents.
11. On the Membership tab, make the necessary updates to the membership and click **Finish**.

The document set is created.

5.15.2 Viewing the properties of a document set

1. Log in to the Core for Capital Projects application.
2. Navigate to the <*project name*>/**03 Document Sets** folder.
3. Right-click the document set and select **Properties**.
4. Click the different tabs on the **Properties** screen to view the details.

5.15.3 Performing actions on a document set

1. Log in to the Core for Capital Projects application.
2. Navigate to the <*project name*>/**03. Document Sets** folder.
3. Select a document set.
4. Click **Tools** > **Actions**.
5. Click **Activate Document Set** or **Deactivate Document Set** based on the current status of the document set.
6. Click **Perform Action & Close**.

5.15.4 Performing actions on the documents of a document set

1. Log in to the Core for Capital Projects application.
2. Navigate to the <*project name*>/**03. Document Sets** folder.
3. Select a document set.
4. Click **Tools** > **Actions (Attached Documents)**.
5. Click the required action and follow the procedure.

Chapter 6

Bulk loading

6.1 Creating a bulk upload spreadsheet

6.1.1 Importing content files to a loading folder

If you have content for the documents that will be created by bulk upload, you must create a content folder in the `/PROJECTS/<Project_Name>/07. Loading/03. Temporary Loading Folders` path.

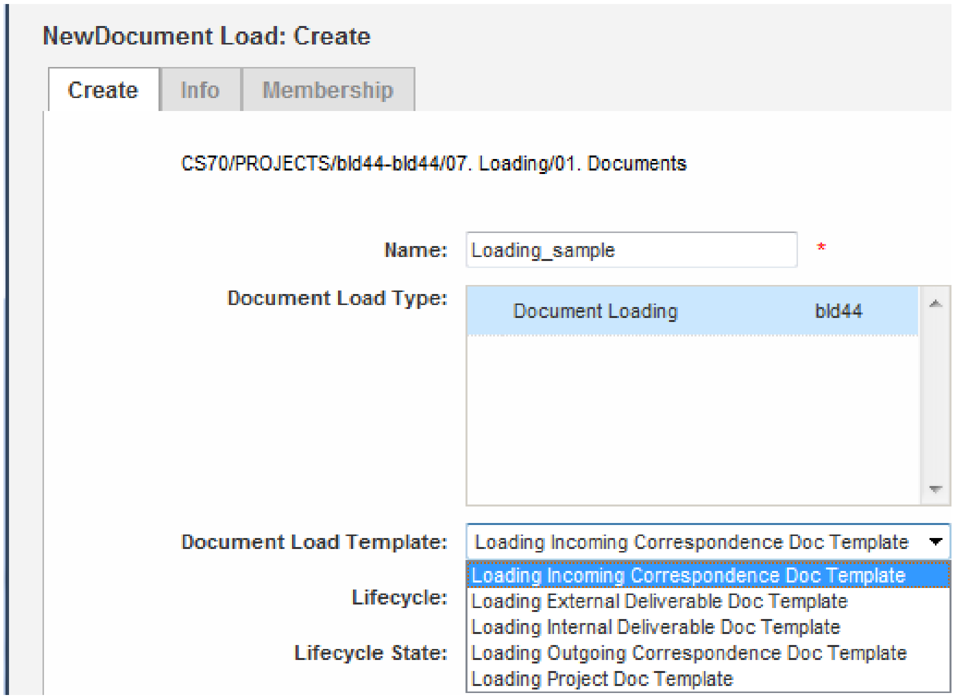
1. Navigate to `/PROJECTS/<Project_Name>/07. Loading/03. Temporary Loading Folders` path.
2. Click **File** > **New** > **Create** to create a new folder.
3. Specify a name for the folder.
4. Open the newly created folder, select **File** > **Import**.
5. Select the document that you want to add as content in bulk upload spreadsheet.
6. Copy the file name of the newly added document.
7. In CCP, the spreadsheet is checked-out by default. Refer to “Creating a bulk upload spreadsheet” on page 35 section for additional details on creating a bulk upload spreadsheet.
8. Open the bulk upload spreadsheet, and paste the file name to the content column.

6.1.2 Creating a bulk upload spreadsheet

The bulk upload tool uses a data sheet (Excel spreadsheet) to import a large number of documents and/or placeholders.

1. Browse to the *`<project name>`*`/07.Loading/01.Documents` folder.
2. Select **File** > **New** > **Document Loading**.
3. Type a name in the **Name** field.
4. Select a template from the **Document Load Template** field.

   The following diagram illustrate the available Document Load Templates:


NewDocument Load: Create

Create
Info
Membership

CS70/PROJECTS/bld44-bld44/07. Loading/01. Documents

Name: Loading_sample *

Document Load Type: Document Loading bld44

Document Load Template: Loading Incoming Correspondence Doc Template

Loading Incoming Correspondence Doc Template
Loading External Deliverable Doc Template
Loading Internal Deliverable Doc Template
Loading Outgoing Correspondence Doc Template
Loading Project Doc Template
Lifecycle:
Lifecycle State:

5. Click **Next**.
6. In the **Info** tab, select *Repository Folder* from the **Content Source** field.
7. Click **Edit** adjacent to the **Content Location** field and browse to a content folder that was created, for example, from the **Browse** tab, navigate to the `<project name>/07.Loading/03.Temporary Loading Folders/` and select the newly created content folder.

   Refer to "Importing content files to a loading folder" on page 35section for additional details on creating a folder.
8. Click **OK**.
9. Click **Next**.
10. In the **Membership** tab, add the required roles for the document. For more information, see "Modifying access to documents" on page 30.
11. Click **Finish**. The row 1 heading in the new blank data sheet relates to the properties of the selected document type.
12. In CCP, the spreadsheet is checked-out by default. If required, navigate to the location where the spreadsheet is created.
13. The spreadsheet contains **Document Load** and **Value Assistance** sheets.

    In **Document Load** sheet, you must fill all the mandatory properties. Some of the columns in the spreadsheet contains value assistance dropdown, you can select appropriate option.

14. The Storage Path column defines the repository path where the object is created relative to the project Master Documents folder (Primary link).

    The Storage Path can be set by using one of the following options:

    Note: For full path and relative path, you must ensure that the folder path exists in the project.

    - Full path: **/PROJECTS/<Project>/01. Master Documents/<Originator>/<Discipline>/<Type of Document>**. For example, **/PROJECTS/<Project>/01. Master Documents/Alfa Luvel UK/Architectural/Plan**
    - Relative path: **<Originator>/<Discipline>/<Type of Document>**. For example, **Alfa Luvel UK/Architectural/Sample**
    - Holding folder:`00. Holding Folder` – You must ensure that the auto filer path is set for the document type. For example, external deliverable, internal deliverable.

      To autofile documents that you create in the `Holding Folder`, add the configuration information for the **Autofiler Path**. For example, `/PROJECTS/${<project.object_name>}/01. Master Documents/Originator=${<this.eif_originator>}/Discipline=${<this.eif_discipline>}/Type of Document=${<this.eif_type_of_doc>}`

      Only documents in the **Holding Folder** are autofiled. You can set **Autofiler Path** for any Document Type associated with any project. However, it is optional.

15. Repeat for all the rows.
16. Save and close the data sheet.
17. Right-click the document and select **Check In**.
18. Click **Ok**. If the check in is successful, you will see a prompt for the same on your screen.

6.1.3 Adding new revision to the existing document

Perform the following to add new revision to the existing document(s):

1. For creating a new bulk upload spreadsheet, refer to "Creating a bulk upload spreadsheet" on page 35 section.
2. Update the spreadsheet with all the required mandatory fields as per the existing document for which you want to create a new revision.

   Note: In the Storage path column, you must provide the complete path details where the document exists. Refer to full path usage in Step 14 in the "Creating a bulk upload spreadsheet" on page 35 section.

3. Save the spreadsheet and check it in.

4. During check-in, to apply matching rules, you must refer to the “Defining matching rules” on page 39 section. Here, select the **new revision** option for **Action**.

   Note: You can add one revision to an existing document per bulk load spreadsheet.

5. For validating a spreadsheet, refer to the “Validating a bulk upload spreadsheet” on page 39 for validation.
6. After you complete validation, you must load a spreadsheet. Refer to “Loading a bulk upload spreadsheet” on page 41 for additional details.

6.1.4 Adding renditions to existing documents

Perform the following to add renditions to existing document(s):

1. For creating a new bulk upload spreadsheet, refer to “Creating a bulk upload spreadsheet” on page 35 section.
2. Update the spreadsheet with all the required mandatory fields as per the existing document for which you want to create a new rendition.

   Note: In the Storage path column, you must provide the complete path details where the document exists. Refer to full path usage in Step 14 in the “Creating a bulk upload spreadsheet” on page 35 section.

3. Save the spreadsheet and check it in.
4. During check-in, to apply matching rules, you must refer to the “Defining matching rules” on page 39 section. Here, select the **Overwrite** option for **Action**.
5. For validating a spreadsheet, refer to the “Validating a bulk upload spreadsheet” on page 39 for validation.
6. After you complete validation, you must load a spreadsheet. Refer to “Loading a bulk upload spreadsheet” on page 41 for additional details.

6.1.5 Adding multiple renditions

Perform the following steps to add multiple renditions to the same document:

1. For creating a new bulk upload spreadsheet, refer to the “Creating a bulk upload spreadsheet” on page 35 section.
2. In the Rendition name and Renditions file column, add the required renditions for a particular row. For example, add Imported Rendition, With Markup and add `XYZ.pdf, ABC.pdf` for the rendition name column.
3. For validating a spreadsheet, refer to “Validating a bulk upload spreadsheet” on page 39 for validation.

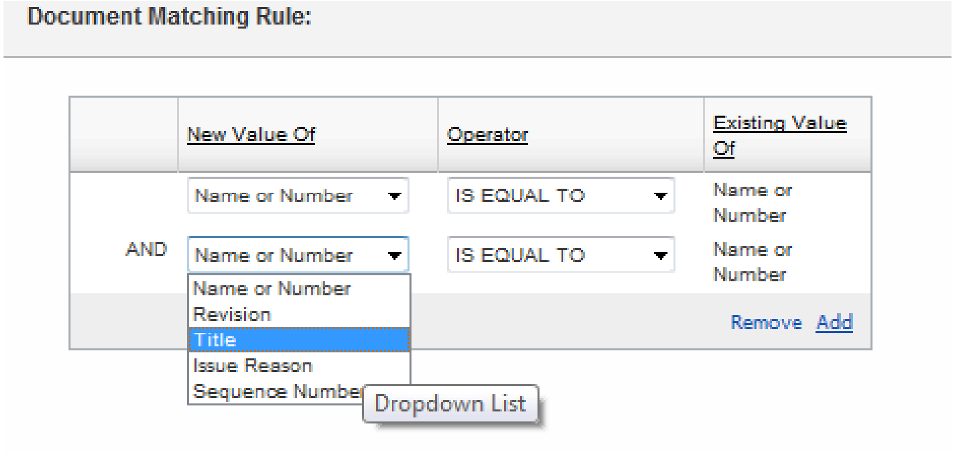
4. After you complete validation, load the spreadsheet. Refer to "Loading a bulk upload spreadsheet" on page 41 for additional details.

6.2 Defining matching rules

Matching rules define how documents are processed when an identical document exists in a folder. Defined matching rules on the document loading templates or on the document loading object instances.

1. Browse to the *<project name>*`/07.Loading/01.Documents` folder.
2. Right-click and select **Properties** and then click the **Upload Settings** tab.
3. Click **Edit** for **Document Matching Rules**.
4. Click **Add** to specify the conditions which qualify a document as identical.

   The following diagram illustrate the document matching rules:



Document Matching Rule:

	New Value Of	Operator	Existing Value Of
	Name or Number	IS EQUAL TO	Name or Number
AND	Name or Number	IS EQUAL TO	Name or Number

5. Click **OK** to specify the action to be taken against the condition using the list box values. Click **Add** to add more conditions.
6. Click **OK** to save and close.

6.3 Validating a bulk upload spreadsheet

You have to verify the spreadsheet before you upload the documents/placeholders.

1. Right-click the bulk upload spreadsheet and select **Actions**.
2. In the **Actions** dialog box, click **Validate**.
3. Click **Perform Action**.

   Validation errors and warnings are displayed. You must view the spreadsheet to see detailed error messages. Refer to ??? section for additional details.

4. In the bulk upload spreadsheet, if one row clears the validation, then the spreadsheet status changes to **Ready** state. Now, you can select **Load** or **Return for more preparation** option.

   Click **Load** to process the load sheet.

5. If required, you can click **Return for more preparation** to modify the spreadsheet.

6. Click **Close**.

6.4 Resolving bulk upload spreadsheet errors

If you see errors when validating the spreadsheet, you can edit it and resolve the errors before you run the load action.

1. Right-click the bulk upload spreadsheet and select **Edit**.

   If a row does not pass the validation, the row status is set to **Invalid**. Hover your mouse over the red tool tip to find the error details. Each cell that has an error is also highlighted in red.

2. Resolve the errors.

   Typically, the values provided in the spreadsheet do not correspond with the pick list values in the relevant project configuration pick list folders.

3. Save and close the spreadsheet.

4. Right-click the bulk upload spreadsheet and select **Check In**.

5. Click **OK**.

6. Validate the spreadsheet. The “Validating a bulk upload spreadsheet” on page 39 section contains the instructions.

6.5 Importing a bulk upload spreadsheet

Perform the following to import a bulk upload spreadsheet:

1. Browse to the `<project name>/07.Loading/01.Documents folder`.
2. Select **File > Import Document.**
3. Click **Add Files**.
4. Browse and select the spreadsheet you want to import and click **OK**.
5. Click **Next**.
6. Select the appropriate **Document Template** from the list box.
7. Select the content location by clicking **Edit** next to the content location.
8. Click **Next**.

9. Add the required roles.
10. Click **Finish**.

    The spreadsheet is imported into Core for Capital Projects.

6.6 Adding content to a placeholder (bulk upload)

If you import a placeholder by using the bulk upload tool, you can use the same spreadsheet to upload the content file.

1. Browse to the *`<project name>`*`/07.Loading/01.Documents` folder.
2. Right-click the bulk upload spreadsheet and select **Edit**.
3. Delete the **Row Status** value (for example, Processed [New document created]) for the required document. This allows you to re-import the row.
4. In the **Content** field, type the name of the document.

   The content file (document) needs to be loaded into the following location: xxxx.
5. Save and close the bulk upload spreadsheet.
6. Validate the spreadsheet. The "Validating a bulk upload spreadsheet" on page 39 section provides the instructions.
7. Load the spreadsheet. The "Loading a bulk upload spreadsheet" on page 41 section provides the instructions.

6.7 Loading a bulk upload spreadsheet

You have to validate the spreadsheet before you load it. Perform the instructions provided in the "Validating a bulk upload spreadsheet" on page 39 section.

1. Right-click the bulk upload spreadsheet and select **Actions**.
2. Select **Load**.
3. Specify a date and time for the load job to run. Alternatively, leave it blank for the load to begin immediately.
4. Click **Perform Action & Close**.

   You will receive a message when the load is completed. The load enters a queue and takes some time to receive the message before the load job is completed.
5. Click the message to read the load report.

The following table describes the bulk upload spreadsheet states.

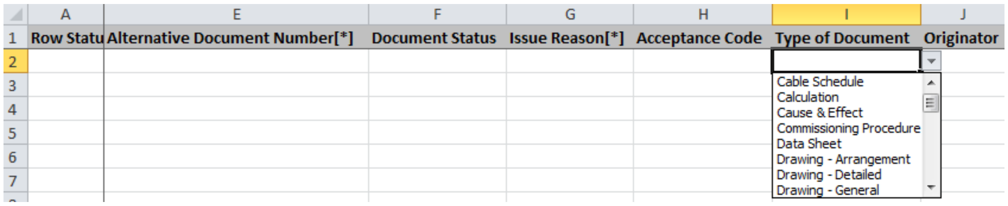
State	Description
Being Prepared	The spreadsheet is being prepared. You can edit it.

State	Description
Ready	Spreadsheet has been validated. You cannot edit it. To edit the spreadsheet: 1. Right-click and select **Actions**. 2. Select **Return for more preparation**. 3. Click **Perform Action & Close**.
Queued	The spreadsheet has had the load action performed successfully and the documents/ placeholders are in a queue awaiting upload. You cannot edit it.
Processed	The spreadsheet has been processed. The documents/placeholders have been uploaded to Core for Capital Projects. You cannot edit it. When you check in the spreadsheet, it will return to the **Being Prepared** state.

6.8 Bulk load value assistance

The bulk load functionality creates a spreadsheet which contains the attributes of a document template. You can type and edit values for these attributes, and create entries for multiple documents. Import the spreadsheet to import large number of properties.

The following diagram illustrate the available types of documents:


A
E
F
G
H
I
J
Row Statu
Alternative Document Number[*]
Document Status
Issue Reason[*]
Acceptance Code
Type of Document
Originator
1
2
3
4
5
6
7
Cable Schedule
Calculation
Cause & Effect
Commissioning Procedure
Data Sheet
Drawing - Arrangement
Drawing - Detailed
Drawing - General

Perform the following steps to create a bulk load spreadsheet:

1. Navigate to the **Loading** > **Documents** node within your project.
2. Select **File** > **New** > **Document Loading**.
3. Type a name for the document.
4. Select a required template.
5. Click **Finish**. A blank spreadsheet is displayed. The header rows indicate the attributes of the template that you have selected in the previous steps.
6. Type the values for the rows. Create as many rows as required.

Note: Some of the attributes in the spreadsheet are list boxes. The logic of these attributes depends on how the attributes are defined in the selected template.

7. Click **Save** and close the spreadsheet.
8. Select the document in Core for Capital Projects, right-click and select **Check In**.
9. Click **OK**.

Chapter 7

Distribution matrix

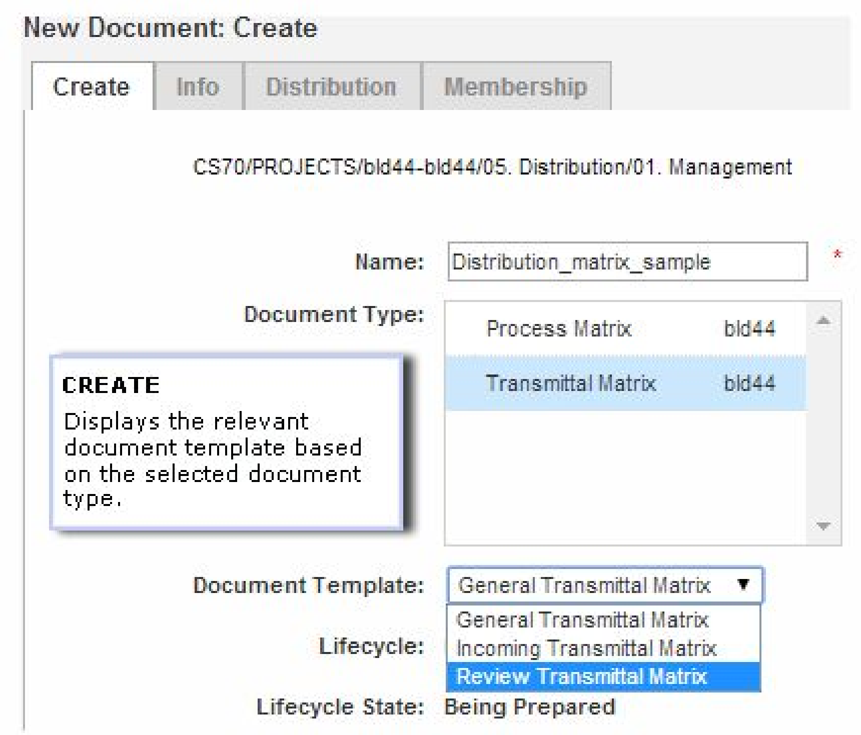
This chapter contains the following topics:

The Distribution matrices enable you to quickly set up the distribution of a transmittal or action process based on a predefined matrix. You can setup the matrix with a number of conditions so that they can be reused in a number of situations.

7.1 Creating a distribution matrix

1. Navigate to the *<project name>*`/05 Distribution/01 Management` folder.
2. Select **File** > **New** > **Distribution Matrix**.
3. Type a name for the distribution matrix.

   The following diagram illustrate the available document templates for a Transmittal Matrix:



New Document: Create

CS70/PROJECTS/bld44-bld44/05. Distribution/01. Management

Name: Distribution_matrix_sample *

Document Type: Transmittal Matrix bld44

CREATE

Displays the relevant document template based on the selected document type.

Document Template: General Transmittal Matrix

Lifecycle State: Being Prepared

Create
Info
Distribution
Membership
Process Matrix bld44
General Transmittal Matrix
Incoming Transmittal Matrix
Review Transmittal Matrix
Lifecycle:

4. Select the type of matrix you want to create, in the **Document Type** field. This can either be Process or Transmittal (for General, Incoming, or Review transmittals).

5. Select the type of transmittal you want to create the matrix for, in the **Document Template** field and click **Next**.
6. Click **Next**.

7.2 Adding columns to a distribution matrix

The columns of a distribution matrix specifies the users or groups that are part of the matrix.

1. Click **Modify Columns**.
2. Click **Add User/ Group**.

   For general transmittals, you can also add an external party as a column. Perform the following steps:

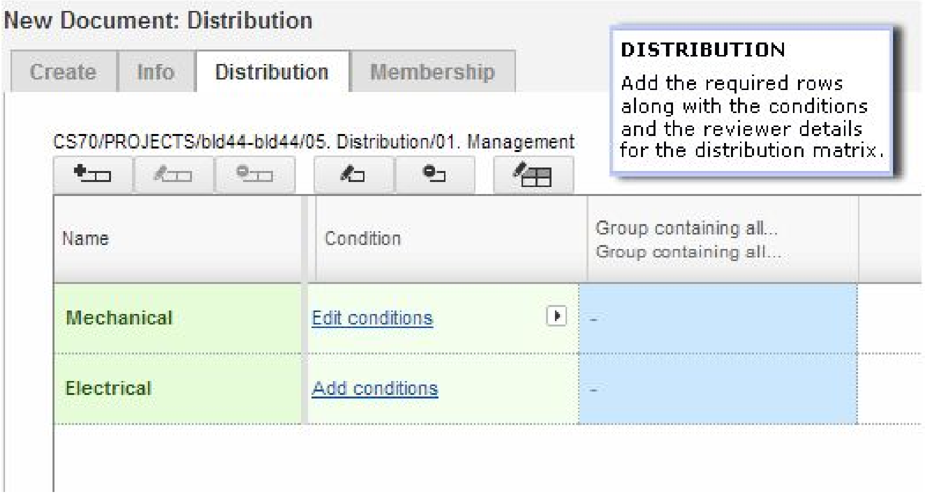
   1. Click **Add External Party**.
   2. Provide the name and email details. These are mandatory fields.
   3. Click **OK**.
3. Click **All Members**.
4. Type a part or all of the user/group in the **Starts with** field and press **Enter**.
5. Select the user/group in the left pane and click the right arrow to add them to the right pane. Repeat this step to add more users, if required.
6. Click **OK**.

7.3 Adding rows to a distribution matrix

Each row in the matrix specifies one particular type of distribution. For example, if the matrix is for a review transmittal, it specifies the lead reviewers, the reviewers and the review approvers. A matrix can have multiple rows each with a different condition. This enables you to apply one particular row may be applied to a transmittal in one instance (depending on the conditions) and another row instance (because the conditions were different).

1. Click **Add Row**.
2. Type a name for the row. This is a mandatory field.
3. Click **OK**. A new row is added to the matrix. Repeat this step to add more rows, if required.

   The following diagram illustrate the available options in a distribution screen:



DISTRIBUTION
Add the required rows along with the conditions and the reviewer details for the distribution matrix.

CS70/PROJECTS/bld44-bld44/05. Distribution/01. Management

Name	Condition	Group containing all... Group containing all...
Mechanical	Edit conditions	-
Electrical	Add conditions	-

7.4 Editing the cells of a distribution matrix

You need to edit the cells and specify the users/groups that receives the tasks or notifications to define the distribution of the transmittal.

1. Select the cell you want to edit.
2. Click **Edit Cells**.
3. Select an appropriate task or reason.

> **Note:** The options displayed in the **Task or Reason** list box depend on the type of distribution matrix you are creating.

4. Select an appropriate delivery method. Click **OK**.
5. Repeat the steps until all the required cells have been edited.

7.5 Adding conditions to a distribution matrix

1. Click **Add Conditions**.
2. Select an appropriate document type.
3. Click **Add**.
4. Select a conditional property.
5. Select the operator.
6. Type the appropriate value.
7. Click **Apply**.
8. Repeat the steps to add more conditions, if required.

9. Click **OK**.

   Note: If you provide more than one condition, they are calculated using the AND condition.

10. Click **Finish**.

7.6 Saving and publishing a distribution matrix

1. Select a distribution matrix.

   Note: Once the distribution matrix is created, the status is set to **Being Prepared**. It cannot be used until it is published.

2. Right-click and select **Actions**.
3. Select **Publish matrix**.
4. Click **Perform Action & Close**.

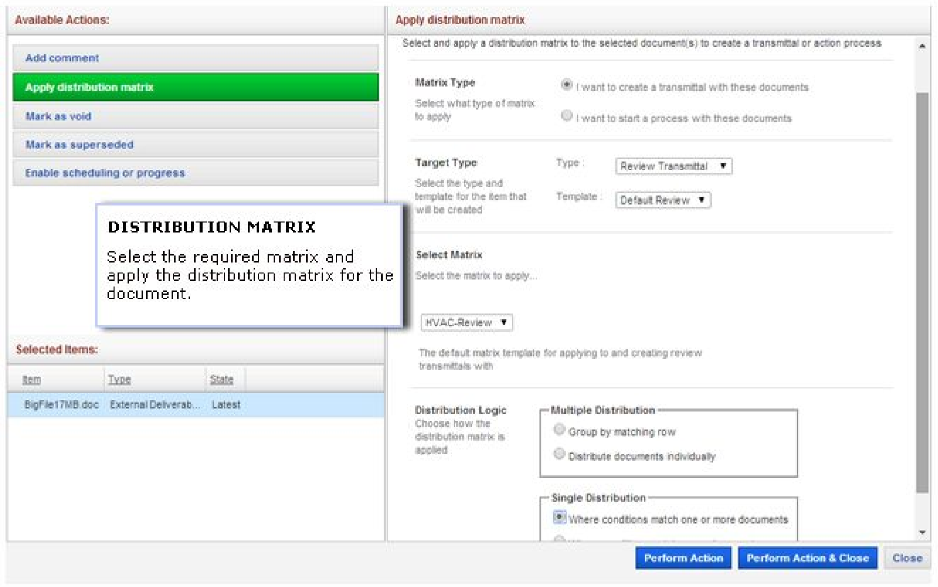
7.7 Applying a distribution matrix to a document

Applying a distribution matrix to a document starts a transmittal or action process (depending on the type defined in the matrix) with the document that you add as the content.

1. Select the document(s) you want to send on a transmittal/action process.
2. Right-click and select **Actions**.
3. Select **Apply distribution matrix**.
4. In **Matrix Type**, use the radio button to send your document on a transmittal or an action process.
5. Select the type of transmittal.
6. Select the matrix you want to apply to the documents.

   Note: Only the matrices that match the matrix type and target type are displayed. For example, if you choose review transmittal, you will be able to select only the review transmittal matrices that have the status set to **Published**.

   The following diagram illustrate the steps to apply the distribution matrix:



DISTRIBUTION MATRIX

Select the required matrix and apply the distribution matrix for the document.

Select and apply a distribution matrix to the selected document(s) to create a transmittal or action process

Matrix Type: Select what type of matrix to apply

● I want to create a transmittal with these documents

○ I want to start a process with these documents

Target Type: Select the type and template for the item that will be created

Type : Review Transmittal

Template : Default Review

Select Matrix: Select the matrix to apply...

HVAC-Review

The default matrix template for applying to and creating review transmittals with

Distribution Logic: Choose how the distribution matrix is applied

Multiple Distribution

○ Group by matching row

○ Distribute documents individually

Single Distribution

● Where conditions match one or more documents

Selected Items:

Item	Type	State
BigFile17MB.doc	External Deliverab...	Latest

7. Select the appropriate matching condition.
8. Click **Perform Action & Close**.
9. Complete the transmittal/action process details. The “Transmittals“ on page 57 provides more information.

7.8 Importing distribution matrices

You can import the distribution matrix details by using a spreadsheet. The spreadsheet provides the details of the distribution matrix and recipient information. You can import the distribution matrix without adding the users to UCF role.

1. Navigate to the `<project name>/05 Distribution/01 Management` folder.
2. Select **File > Import**.
3. In the **Import File Selection** screen, click **Add Files**.

   The *Core for Capital Projects Configuration Guide* provides more details about the distribution matrix.
4. In the **Select Files** dialog box, select the required distribution matrix file.
5. Click **OK**.
6. In the **Import File Selection** screen, select **Next**.
7. In the **Import Object Definition** screen, select **Transmittal Matrix** next to the **Document Type** label.

8. Select **Review Transmittal Matrix** from the **Document Template** list box.
9. Click **Finish**.

Note: After importing the distribution matrix, if you notice the spreadsheet icon instead of the distribution icon, you must right-click, select properties, and navigate to the **Distribution Import Issues** tab. The **Distribution Import Issues** tab provides the issue details.

Chapter 8

Document sets

The configuration of Document Set is implemented as Collections in Core for Capital Projects. The Document Set name usage is followed only in Core for Capital Projects-Admin interface.

A Collection in Core for Capital Projects is a simple implementation of Document Set. Not all functionalities of the Document Set features are available in Core for Capital Projects.

The following table describes the Document Set features that are supported in Core for Capital Projects Admin and Core for Capital Projects interfaces:

Core for Capital Projects Admin	Core for Capital Projects
• You can deactivate a document set and change the status to inactive. This document set cannot be viewed in CCP user interface. • For the document sets that exist in both CCP Admin and the new CCP user interface, you must not use any additional actions in the CCP Admin user interface. For example: adding version **Note:** The changes that you perform in the CCP Admin user interface will not be reflected in the new CCP user interface.	• Adding documents to a Collection • Deleting a Collection • Search a Collection • Modify a Collection

This chapter contains the following topics:

8.1 Creating a document set

1. Navigate to the <*project name*>/**03 Document Sets** folder.

   The *Configuring the Existing Project Templates for New Features* section in the *Documentum for Capital Projects Configuration Guide* provides details to create document sets folder for upgrade process.

2. Click **File** > **New** > **Document Set**.

   Type the following details:

   - **Name**: Specify the required document set name.
   - **Document type**: Select the type of document set. By default, you can notice **Document Set** type. After you create a work package type, you can select **Default Work Package**.

  - **Document Template**: Select a document set template. For example: **Empty Document Set**.
  - **Lifecycle**: If multiple lifecycle are present, select an appropriate lifecycle.
  - **Lifecycle State**: Select a lifecycle state such as, **Active** or **Being Prepared**.

3. Click **Next**.
4. In the **Info** tab, type the required values.
5. Click **Next**.
6. Specify a name for the document.
7. Click **Next**.
8. Click **Next**.
9. In the **Documents** tab, click plus sign.
10. To add a document from:
    - The master documents folder, click **Browse**.
    - The list of documents within the current project, click **List**.
    - The loading sheet, click **From Loadings**.
11. Select the required document (s) and click the right arrow to include the document in the content area.
12. Click **OK**.
13. The selected documents are listed in a table.
14. Click **+** to add more documents or **-** to remove the selected documents from the list.
15. Click **Finish** to save the changes.
16. Click **OK**.
17. Click **Finish** after adding the required documents.

The document set is created.

8.2 Viewing the properties of a document set

1. Navigate to the folder where you have created the document sets. For example:<*project name*>/**03 Document Sets** folder.
2. Right-click the document set and select **Properties**.
3. Click the different tabs on the **Properties** screen to view the details.

8.3 Performing actions on a document set

1. Navigate to the folder where you have created the document sets. For example:<*project name*>/**03. Document Sets** folder.
2. Select a document set.
3. Click **Tools** > **Actions**.
4. Based on the current status of the document set or work package, the set of operations are visible.

   For example: For the work packages in **Being Prepared** state, the **Activate Document Set** operation is allowed.

   For Active document sets, **Deactivate Document Set** or **Create New Revision** operation is allowed.
5. Click **Activate Document Set** or **Deactivate Document Set** based on the current status of the document set.
6. Click **Perform Action** or **Perform Action & Close**.

8.4 Performing actions on the documents of a document set

1. Navigate to the folder where you have created the document sets. For example:<*project name*>/**03 Document Sets** folder.
2. Select a document set.
3. Click **Tools** > **Actions (Attached Documents)**.
4. Click the required action and follow the procedure.

8.5 Comparing document sets

Using Compare Document sets feature, you can compare two different versions of the document sets or other containers. The compare report displays the details of the documents that were added, removed, or revised.

To compare a document set:

1. Navigate to the folder where you have created the document sets. For example:<*project name*>/**03 Document Sets** folder.
2. Select a document set, right-click and select **Compare**.

   The **Executing Report** page displays the list of different versions for the selected document.

   The **Executing Report** page contains two options **Versions** (selected by default) and **Other Containers**.

   Versions

   a. To compare with a previous version, select one of the available version.
   b. Click **Next**.
   c. The **Executing Report** screen displays the report format and report mode. The report format options are **pdf**, **xls**, and **csv**. For example: Select the **pdf** format.
   d. Click **Run**.

   Other Containers

   a. To compare the document set with other containers, select **Other containers** option.

      A **Search Name/Title** textbox displays along with **All Versions** and **All Revisions** check box.

   b. Type the required search value and select All Versions or All Revisions.
   c. Click **Search**.

      The search result displays the list of available containers.

   d. Select one the version in the table.
   e. Click **Next**.
   f. The **Executing Report** screen displays the report format and report mode. The report format options are **pdf**, **xls**, and **csv**. For example: Select the **pdf** format.
   g. Click **Run**.
3. The report is generated and opens in an appropriate viewer for the selected report format.

Note: In the Document sets folder, you can compare multiple document sets. Further, you can select the required report format.

Chapter 9

Transmittals

This chapter contains the following topics:

9.1 General transmittals

You can use a general transmittal primarily to register the transmittal of document from the company to a third-party company. However, you can use it for internal transmittals as well.

9.1.1 General transmittal status

Following are the actions available for a general transmittal whose document status is **Awaiting Acknowledgement**, **Awaiting Response**, or **completed**:

State	Available Actions
Awaiting Acknowledgement	Mark as acknowledged
Awaiting Acknowledgement	Download package
Awaiting Response	Download package
Completed	Download package

9.1.2 Download package details

The download package includes the following:

- Folder for attachments - This include the original documents for that transmittal as is. This is not available if you select the check box to not include any document content files in packages created when delivering this transmittal. By default, this check box is not selected.
- Coversheet document - This includes a cover sheet.
- Comment package zip file - A zip file that has a root folder for every document included in a transmittal. A document can be of any format. The root folder includes the following details:
  - Folder with attachments - This folder contains the original attachment associated with a comment. This attachment will show as is without any comments or markups.

    Note: If the comment does not include any attachments, then this folder is not available.
  - Review summary PDF - This includes the comments from every reviewer who has commented on the document.

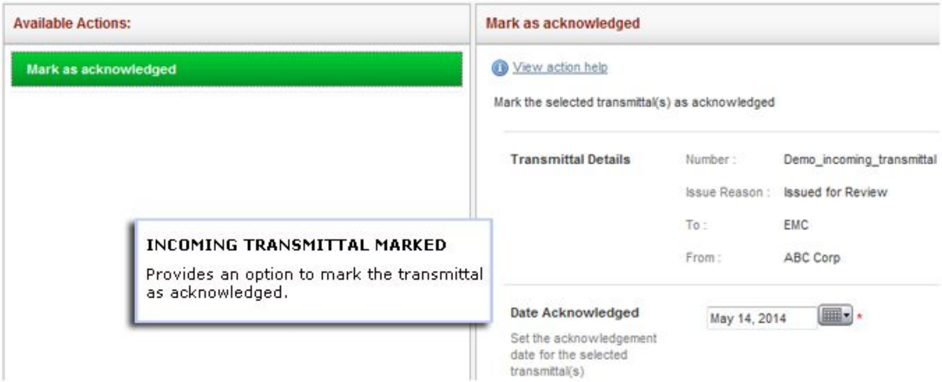
- PDF Rendition - A PDF rendition of the original document, together with the mark-ups from every reviewer for the selected status of comments chosen earlier.

9.2 Incoming transmittals

9.2.1 Acknowledging an incoming transmittal

1. Right-click the transmittal and select **Actions**.
2. Click **Mark as acknowledged**.
3. Select a date using the calendar picker for **Date Acknowledged**.

   The following diagram illustrate the steps for marking the transmittal as acknowledged.



INCOMING TRANSMITTAL MARKED

Provides an option to mark the transmittal as acknowledged.

Mark the selected transmittal(s) as acknowledged

Transmittal Details

Number : Demo_incoming_transmittal

Issue Reason : Issued for Review

To : EMC

From : ABC Corp

Date Acknowledged: May 14, 2014 *

Set the acknowledgement date for the selected transmittal(s)

4. Click **Perform Action & Close**.

   The status of the transmittal is set to **Completed**.

Notes

- If you select **Acknowledgement is required** but do not provide a date, the status of the transmittal is set to **Awaiting Acknowledgment**.
- If you select **Acknowledgement is required** and provide a date, the status of the transmittal is set to **Completed**.

9.3 Review transmittals

A review transmittal enables you to initiate and manage the review of documents.

9.3.1 Creating a review transmittal Automatically

1. Browse to the `Projects/`*`<project name>`*`/05.Distribution/01.Managament` folder.
2. Click **File** > **New** > **Distribution Matrix**.
3. Enter a name for the distribution matrix, for example, *Architecural-Review*.
4. Select *Transmittal Matrix* from the **Document Type** field.
5. Select *Review Transmittal Matrix* from the **Document Template** field.
6. Click **Next**.
7. Click **Next**.
8. In the **Distribution** tab, click
9. In the **Modify Distribution Columns** screen, click **Add User/Group**.
10. Select the required users and click **OK**.
11. Add the required rows.
12. Click **OK**.
13. Click **Next**.
14. Click **Finish**.
15. Browse to the `Projects/`*`<project name>`*`/05.Distribution/02.Incoming Transmittals` folder.
16. Click **File** > **New** > **Transmittal**.
17. In the **Documents** tab, select the document from the *Architectural* discipline.
18. Click **Finish**.
19. Select the transmittal.
20. Right-click and select **Actions**.
21. Click **Receive transmittal**.
22. Browse to the `Projects/`*`<project name>`*`/05.Distribution/04.Review Transmittals` folder.

The transmittal is automatically created in the `Projects/`*`<project name>`*`/05.Distribution/04.Review Transmittals` folder.

9.3.2 Viewing a review transmittal

Click **View Review Transmittal** to view the review transmittals.

9.3.2.1 Viewing the progress of a review transmittal

The lead reviewer task is sent as a pending task at the beginning of the transmittal. You can open the task to view the progress of the review stage.

The reviewers names are listed in the commenting section of the **Distribution** tab.

The following table describes the status:

Status	Description
Pending	Indicates an upcoming task
In Progress	Indicates that a user has received the task but not finished
Finished – (Comments Made/No Comments Made)	Indicates that the task is completed

9.4 Delivery methods

You can set the required multiple delivery methods as per your requirement. This section describes the following sample delivery methods.

9.4.1 Setting the recipient delivery method

1. Browse to the `Project Configs/` *`<Project configuration name>`*`/20 Transmittals/01 Types` folder.
2. Right-click general transmittal and select **Properties**.
3. In the **Properties** dialog box, select **Settings**.
4. Click **Edit** next to **Recipient Delivery Methods**.
5. In the **Recipient Delivery Methods** dialog box, select the required delivery method and click **Add**.
6. Click **OK**.

Chapter 10

Handover

This chapter contains the following topics:

The Core for Capital Projects progresses from the design and build phases to the handover-to-operations phase. This lifecycle also includes reporting. Later, based on the requirement, the operations group can hand back the documents that were handed over, back to the Core for Capital Projects.

10.1 Marking a document for handover

1. Select a document you want to include in a handover package.
2. Right-click and select **Actions**.
3. Click **Mark for Handover**.
4. Click **Perform Action & Close**.

10.2 Marking a document as latest

1. Select a document you want to include in the handover package.
2. Right-click the document and select **Actions**.
3. Click **Mark as Latest**.
4. Click **Perform Action & Close**.

By default, all external and internal documents are marked for handover. When their **Issue Reason** is set to **Approved for As-Built** and **Status** is set to **Latest**, the handover status of these documents is set to **Ready**.

10.3 Marking the documents as ready for handover

1. Select a document you want to include in a handover package.
2. Right-click and select **Actions**.
3. Click **Mark as Ready for Handover**.
4. Click **Perform Action & Close**.

10.4 Creating a handover package

1. Select **File** > **New** > **Handover Transmittal**.

   The **New Handover Package** dialog box appears.

2. Specify the name of the handover package. This is a required field.

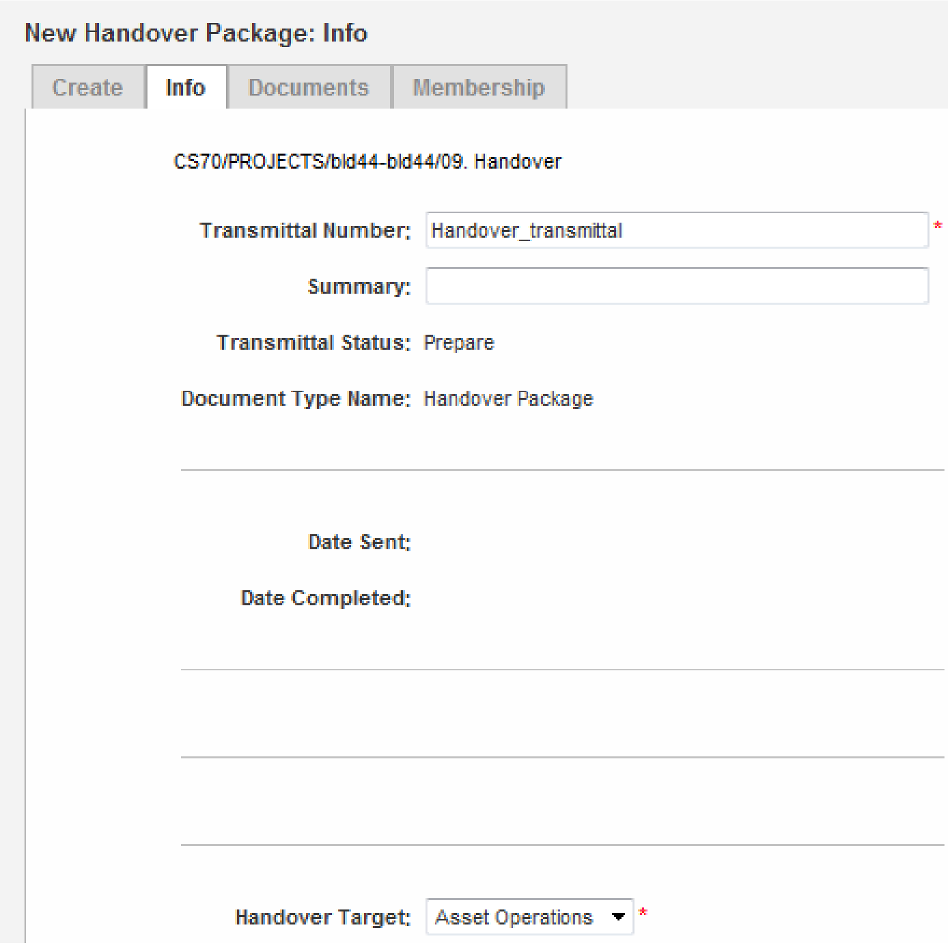
3. Select a transmittal type.

4. Select a transmittal template.

5. Click **Next**.

6. Specify a summary, if required.

7. Set **Handover Target** to `Desired Handover Target`. This is a required field.



New Handover Package: Info

CS70/PROJECTS/bld44-bld44/09. Handover

Transmittal Number: Handover_transmittal *

Summary:

Transmittal Status: Prepare

Document Type Name: Handover Package

Date Sent:

Date Completed:

Handover Target: Asset Operations *

8. Click **Next**.

10.5 Adding documents to a handover

1. In the **Documents** tab, click ✚.

   You can attach only deliverable documents to a handover package.
2. Browse to the folder that contains the document(s).
3. To add a document from:
   - The master documents folder, click **Browse**.
   - The list of documents within the current project, click **List**.
   - The clipboard, click **From Clipboard**.
   - The document set, click **From Document Set**.
4. Select the document in the left pane and click the right arrow to add it to the right pane. Repeat this step until all the documents are added, if required. Click **OK**.
5. Click **Next**.

10.6 Unmarking a document for handover

1. Select a document that is marked for handover.
2. Right-click and select **Actions**.
3. Click **Unmark from handover**.
4. Click **Perform Action & Close**.

10.7 Starting a handover

1. In the **Handover** page, right-click a Handover package, and select **Actions**.
2. Click **Start handover**.
3. Click **Perform Action & Close**.

When you start the handover process, the documents in the handover are packaged as a zip file. To locate the zip file, right-click the handover package and click **Properties** and then navigate to the **Content** tab. A notification is flashed after the handover package is published.

The handover package is set to the **Published** status indicating that the package is ready for consumption. Controllers must manually mark the Handover package as **Completed**. Since the processing of a handover is performed as a background process, the status of the handover package is set to **Pending** until the process is completed.

The handover package moves to the **Pending** state. The

```
HandOverQueueProcessor
```

job runs asynchronously to process the handover package and moves it to the **Published** state.

10.8 Cancelling a handover

1. In the **Handover** page, select a handover package, right-click and click **Cancel Handover**.
2. Provide a justification for cancelling the handover in the text box, if required.
3. Click **Perform Action & Close**.

   The status of the handover package is set to **Cancelled**.

When you cancel a handover, all the documents in the handover package are listed in the **Cancelled** folder.

10.9 Completing a handover

1. In the **Handover** page, select a handover package, right-click and click **Complete Handover**.
2. Click the **Delete the content zip file associated with this handover**, if required.
3. Click **Perform Action & Close**.

Note: The documents from the cancelled document state are ready for use in another handover package.

Chapter 11

Import and reply to a correspondence

11.1 Creating an incoming correspondence

1. Browse to the `<project name>/02.Correspondence` folder.
2. Click **File** > **New** > **Import**.
3. In the **Import: File Selection** screen, click **Add Files** and select the required message file, and then, click **OK**.
4. Click **Next**.
5. In the **Import: Object Definition** tab, click **Edit** next to the **From** and **To** label and add the required values.
6. Click **Finish**.

11.2 Marking a correspondence as recorded

1. Select an incoming or outgoing correspondence.

   Note: The status is available only after you create an outgoing correspondence.

2. Click **Tools** > **Actions**.
3. In **Available Actions** section, click **Mark as recorded**.
4. In the **Mark as recorded** tab, select the response required date.
5. Click **Perform Action & Close**.
6. The document status changes to **Awaiting Response**.

11.3 Starting a send response action

1. Right-click the send response action process and select **Actions**.
2. Select **Start Action Process**.
3. Type notes for the performer (optional).
4. Click **Perform Action & Close**.

11.4 Creating an outgoing correspondence

1. Select the newly created incoming correspondence.
2. Click **Tools** > **Actions**.
3. In **Available Actions** section, click **Create Response**.
4. In **Create Response** section, select **Outgoing Correspondence** and **Empty Correspondence Document** for **Type** and **Template** respectively.
5. Click **Perform Action & Close**.
6. In **Info** tab, click **OK**.

11.5 Marking a correspondence as completed

1. Select the outgoing correspondence document.
2. Click **Tools** > **Actions**.
3. In **Available Actions** section, click **Mark as completed**.
4. In the **Info** tab, select the response date.
5. Click **Perform Action & Close**.

   The document status changes to **Completed**.

Chapter 12

Searching

12.1 Managing search results

When you run a search, the search results appear in the content pane.

To edit and save a search:

1. Click **Edit**.

   Note: Even if the original search was simple, the advanced search dialog box appears. The search criteria appears in the **Contains** field.

2. Modify your search criteria and click **Search**.
3. Click **Save**.
4. Type a name for the saved search criteria.
5. Click **OK**.

   The following table describes additional options for saving the search results:

Field	Description
Include Results	Saves the initial search results. To view them: 1. Click **Saved Search**. 2. Right-click the relevant saved search. 3. Select **View Saved Results**.
Make Public	Saved search results visible to all users.

To access saved search results:

1. Click **Saved Searches**.
2. Ensure **Saved Searches** is selected.
3. Use the list box to show either **My Saved Searches** or **All Saved Searches**.
4. To run a saved search, right-click the saved search and select **Run Search**. The search results appear in the content pane.

   Note: You can edit and delete your saved search results.

To create a search template:

1. Set up and run the search.

2. Click **Search**.

   The search results appear.

3. Click **Save Template**.
4. Type the name for your template in the **Name** field (mandatory) and provide a **Description** (optional).
5. Select **Make this search available to others** if you want other users to use your template.
6. By default, all the search elements are in **Fixed values**. To add them to **Input fields**, select and click the right arrow. For example, you can add **Type of Document**.

To use a search template:

1. Click **Saved Searches**.
2. Click **Search Templates** if you do not find any templates.
3. Right-click the template you want to run and select **Search**. The search template dialog box appears with the input fields.
4. Type the values for the **Input fields**. The values are case insensitive.

   Note: You can also select from the list box.

5. Click **Search**.
6. Click a filter to filter the search results.

   When you run a search, the **Smart Navigation** pane appears automatically. It contains predefined filters namely Topic, Owner, and Modified with the number of results that meet the filter criteria in brackets.

   Notes

   - You can modify the predefined templates.
   - You can expand some filters to show additional levels. Click **+** to view the additional options.

12.2 Searching for documents (simple)

1. Type the search criteria in the **Search** field.

   The following table shows a sample search criteria and describes the corresponding search results:

Criteria	Description
ACME Birsco	Documents that contain the word `ACME` or `Birsco`
ACME OR Birsco	Documents that contain the words `ACME` or `Birsco`
“ACME Birsco”	Documents that contain the exact string `ACME Birsco`
ACME NOT Birsco	Documents that contain the word `ACME` but not `Birsco`
NOT Birsco	Documents that do not contain the word `Birsco`
KBM001–HPC-KIRBAM-F3–HCA	Type it into the search field if you are searching for part or all of a document number

2. Click **Search**.

12.3 Searching for documents (advanced)

1. Click **Advanced**.
2. Type your search criteria and click **Search**. When the search is executed, the individual phrases are joined with an AND condition. Your search results appear in the content pane. The “Managing search results” on page 67 contains more information.

   - **Contains**: Works in the same way as the simple search field.
   - **Locations**: The default for a simple or an advanced search is to search the whole repository. In an advanced search, you can limit your search area by using one of the following options:
     - Select **Current location only**. Searches the selected cabinet/folder and all subfolders only that were accessed prior to selecting the **Advanced search** dialog box.
   - Select **Repository** and click **Edit**. Select the repository in the right pane. Click the left arrow to remove it from the **Included in Search**. Do this so that the whole repository is not included in your search:
     - Browse and select the cabinet/folder you want to include in your search, in the left pane. Click the right arrow to add it to **Included in Search**. Repeat this step to include more cabinets/folders, if required. Click **OK**.

- **Object Type**: Select the type of object you are searching for using the list box.

  Properties:

  a. Select the property you want to search in the first field by using the drop-down arrow.

     The properties that are available relate to the **Object Type** selected. In the list, if you cannot find the required property, then consider changing the object type. For example, if you are trying to search using the **From** attribute then you will need to select the **EPFM Correspondence Document** object type.

  b. Select the search operator in the second field by using the drop–down arrow.

  c. Type your search criteria in the third field.

     The search syntax does not work in this field. It searches the exact string (case insensitive).

  d. Click **Add another property** to add another line of fields.

  e. Select to join the new property to the one before with either an AND or an OR condition.

  f. Repeat the first three steps.

- **Date**: Various date attributes are available to search:

  a. Select the date you want to search on using the drop down arrow.

  b. You can then either:

     – Use the drop down arrow to select one of the default search ranges, OR

     – Select **From** and use the calendar picker to specify a date range.

- **Size**: Specify the size of the document you want to search for using the list box.

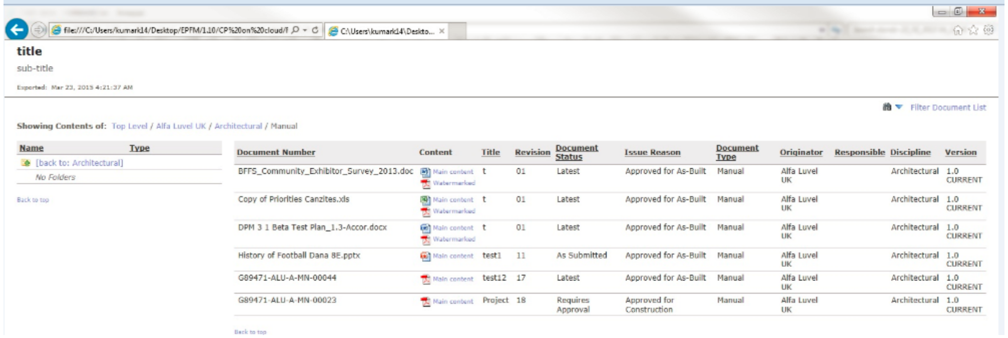
Chapter 13

Library export

Library Export is a method to extract the metadata and the structure of a folder and package it as a zip file. The zip file, when unzipped, will assume the exact structure of the folder that was extracted.

1. Log in to the Core for Capital Projects application.
2. Navigate to the <*project name*>/**01. Master Documents** folder.
3. Click **Tools** > **Actions**.
4. In the **Available Actions** screen, click **Library export**.
5. In the **Library export** screen, select the required options.
6. Click **Perform Action & Close**.

The zip file follows `username-date` format and the user gets an email notification. You can view the newly exported zip file in the `/PROJECTS/G89471-Onshore_storage` /**04. Library Export** folder.



file:///C:/Users/kumark14/Desktop/EPFM/1.10/CP%20on%20cloud/F
C:\Users\kumark14\Deskto...

title

sub-title

Exported: Mar 23, 2015 4:21:37 AM

Showing Contents of: Top Level / Alfa Luvel UK / Architectural / Manual

Name	Type
[back to: Architectural]	
No Folders	

Document Number	Content	Title	Revision	Document Status	Issue Reason	Document Type	Originator	Responsible	Discipline	Version
BFFS_Community_Exhibitor_Survey_2013.doc	Main content Watermarked	t	01	Latest	Approved for As-Built	Manual	Alfa Luvel UK		Architectural	1.0 CURRENT
Copy of Priorities Canzites.xls	Main content Watermarked	t	01	Latest	Approved for As-Built	Manual	Alfa Luvel UK		Architectural	1.0 CURRENT
DPM 3 1 Beta Test Plan_1.3-Accor.docx	Main content Watermarked	t	01	Latest	Approved for As-Built	Manual	Alfa Luvel UK		Architectural	1.0 CURRENT
History of Football Dana 8E.pptx	Main content	test1	11	As Submitted	Approved for As-Built	Manual	Alfa Luvel UK		Architectural	1.0 CURRENT
G89471-ALU-A-MN-00044	Main content	test12	17	Latest	Approved for As-Built	Manual	Alfa Luvel UK		Architectural	1.0 CURRENT
G89471-ALU-A-MN-00023	Main content	Project	18	Requires Approval	Approved for Construction	Manual	Alfa Luvel UK		Architectural	1.0 CURRENT

Chapter 14

Reports

This chapter contains the following topics:

The following report types are available in the Core for Capital Projects solution:

- All Documents Report
- Correspondence Action Report
- Late – Pending Transmittals Report
- Master Documents Report
- Master Documents with Progress Report
- Project Transmittals Report
- Review Transmittals Report
- Approval Status
- Document Progress Chart Example
- Handover Status Report
- Project transmittals Report
- Review Task Report
- Transmittal Status Chart Example

You can use any of these report types to create a new report template. After you create the template, you will be able to run reports based on that template.

The template determines:

- The type of report.
- Report parameters – you can use these to filter the report. The parameter options are different for each report types, for example, the **Correspondence Actions Report** includes these parameter options: `Document Status`, `Originator`, and `Document Issue Reason`.
- Output options – you can use these options to save or open (or both) a report and select the formats in which you can view or save the report.

14.1 Creating a report template

1. Browse to the **Reports > Templates** node within your project.
2. Select **File** > **New** > **Report**.
3. Type a name for your report template.
4. Select a report type and click **Next**.
5. In the **Info** tab, click **Next**.
6. In the **Def.Param.Vals.** tab, set the various parameters using the drop-down list, and click **Next**. For more information, see "Setting the report template parameter values" on page 74.
7. In the **Settings** tab, enter the required details like format and scheduling and click **Next**. For more information, see "Report settings" on page 77.
8. In the **Membership** tab, modify any membership details if required and click **Finish**.

14.1.1 Setting the report template parameter values

Type values for the available properties to add default filters to report. None of the parameters are mandatory. The default values are used for the template when you run the report. Different report types have different parameters that you can set. These are outlined in the following tables.

Table 14-1: All Documents Report

Parameter	Type
Document Status	Pick List
Originator	Pick List
Created After	Date
Created Before	Date
Acceptance Code	Pick List
PO Number	Pick List

Table 14-2: Incoming document register report

Parameter	Type
Document Status	Pick List
Originator	Pick List
Document Issues Reason	Pick List
PO Number	Pick List

Table 14-3: Late – Pending transmittal report

Parameter	Type
Transmittal Issue Reason	Text
Transmittal Type	Pick List
From	Text
To	Text
Pending Days	Integer
Transmittal Status	Pick List
Document Status	Pick List
Originator	Text
Document Issue Reason	Text
Acceptance Code	Pick List
PO Number	Pick List

Table 14-4: Master documents with progress report

Parameter	Type
Show all document revisions	Check box
Document Status	Pick List
Originator	Text
Document Issue Reason	Text
Acceptance Code	Pick List
PO Number	Pick List

Table 14-5: Project transmittals report

Parameter	Type
Transmittal Issue Reason	Text
Transmittal Type	Pick List
From	Text
To	Text
From Sent Date	Date
To Sent Date	Date
From Received Date	Date
To Received Date	Date
From Due Date	Date

Parameter	Type
To Due Date	Date.
Transmittal Status	Pick List
Document Status	Pick List
Originator	Text
Document Issue Reason	Text
Acceptance Code	Pick List
PO Number	Pick List

Table 14-6: Review transmittals report

Parameter	Type
Transmittal Issue Reason	Text
From Due Date	Date
To Due Date	Date
Transmittal Status	Pick List
Document Type	Pick List
Document Status	Pick List
Originator	Text
Document Issue Reason	Text
Acceptance Code	Pick List
PO Number	Pick List
Recipient	Text. **Note:** Use comma separated recipient names.

When you run a review transmittal process report with the recipient values entered, the system generates a report to include only those transmittals where you have these recipient values.

14.2 Report settings

1. On the available report templates, right-click and select **Properties**.

   Note: The system uses the values set in the **Def. Param. Vals** tab as the default values for the scheduled reports.

2. On the **Settings** tab, select a format from the available list.

   Note: Reports with `xls` format are no longer supported as the system now supports the `xlsx` format.

3. To activate scheduling, select the **Enabling Scheduling** option. As part of the Scheduling, you can set the following options:

   - Start Date and Time: This is the date and time the system generates the first instance of the report.
   - Repeat: This determines how often the report runs based on the time unit and frequency values. For example, setting the repeat time unit to **Weeks** and the frequency to **2** creates a scheduled report every two weeks from the first date of running the report.
   - Frequency:This determines how often the report is run based on the **Repeat** unit of time selected.
   - End Date and Time: This is the time frame during which the system generates the reports. Once the system reaches the end date and time, no reports are scheduled and the system does not generate any further reports.
   - Max. Iterations: The maximum number of scheduled reports that the system generates. For example, if the value is set to 10, then using the combination of repeat, time unit, frequency, and iterations, the system generate reports over the specified duration. After 10 iterations, the system does not generate any more reports.

4. Click **OK**.

14.3 Activating the report template

After you save the report, the status is set to **Being Prepared**. You need to activate it before you can use the template to create reports.

1. Browse to the **Reports** > **Template** node within your project.
2. Select the required report template.
3. Right-click and select **Actions**.
4. Select **Activate Report**.
5. Click **Perform Action & Close**.

14.3.1 Deactivating the report template

1. Browse to the **Reports** > **Template** node within your project.
2. Select the required report template.
3. Right-click and select **Actions**.
4. Select **De-Activate report**.
5. Click **Perform Action & Close**.

14.4 Running a report

1. Browse to the **Reports** > **Template** node within your project.
2. Select the required report template.
3. Right-click and select **Run Report**.
4. In the Executing Report screen, enter the required values and click **Next**.

   Note: You can enter the values only if the report has parameters.

5. In the next screen, review the details for format, saved report location, and saved report details and click **Run**.

Chapter 15

Supplier Exchange

The Core for Capital Projects Connector for Supplier Exchange connects Core for Capital Projects to a software as a service Supplier Exchange environment.

15.1 Registering Core for Capital Projects with Supplier Exchange project

When you register the project in Core for Capital Projects, the Supplier Exchange connector verifies if there is a project in Supplier Exchange with the same project code. Else, a new project is created in Supplier Exchange with the Core for Capital Projects project reference and project name. You can assign the project coordinator role for the newly added project. These configurations are controlled by the settings set in the `xchange_config.xml` file.

To register the project:

1. Log in to Core for Capital Projects.
2. Navigate to the project work area.
3. Select the project to be registered.
4. Click **Tools** > **Actions**.
5. Click **Register Project with Supplier Exchange**.

15.1.1 Unregistering Core for Capital Projects with Supplier Exchange project

To unregister the project:

1. Log in to Core for Capital Projects.
2. Navigate to the project work area.
3. Select the registered project.
4. Click **Tools** > **Actions**.
5. Click **Unregister with Supplier Exchange**.

15.2 Unregistering Core for Capital Projects with Supplier Exchange deliverable

To unregister the deliverable:

1. Log in to Core for Capital Projects.
2. Navigate to the project work area.
3. Select the registered project.
4. Navigate to **documents**.
5. Click **Tools** > **Actions**.
6. Click **Unregister with Supplier Exchange**.

Note: The deliverable in the Supplier Exchange will be deleted immedietely.

15.3 Registering external deliverable document to Supplier Exchange

External deliverable documents created in Core for Capital Projects can be registered with Supplier Exchange by either performing the **Register Deliverable with Supplier Exchange** action or automatically by the plugin when the document is created in the project. Documents are automatically registered with Supplier Exchange if the project is already registered. For documents created prior to project registration, one needs to register them with Supplier Exchange.

To register the document in Supplier Exchange, perform the following:

1. Log in to **Core for Capital Projects**.
2. Navigate to the project work area.
3. Select the document to be registered.
4. Click **Tools** > **Actions**.
5. Click **Register Deliverable with Supplier Exchange**.

15.4 Sending general transmittals to Supplier Exchange

To enable sending of the General Transmittal to Supplier Exchange, you must perform the following:

1. Navigate to **Transmittals** > **Types** > **General transmittal** > **Properties**.
2. On the **Settings** tab, and edit the **Recipient Delivery Method**.
3. Add **Supplier Exchange Site** as one of the delivery methods.

When you send the general transmittals, this option will be available as one of the options in the **Deliver By** list.

You must set the company value same as the contract value in Supplier Exchange while sending the general transmittal.

15.5 Enable or disable incoming transmittal per deliverable from Supplier Exchange

Perform the following to enable or disable the incoming transmittal:

1. Log in to Core for Capital Projects Admin user interface.
2. In **Search** tab, search for`xchange_config.xml` file.
3. Right click on the XML file and checkout the file.
4. Locate the **enableSingleIncomingTransmittalPerDeliverable** property.
5. Update the default value from false to **True**.
6. Click **Save**.
7. Right-click and select `xchange_config.xml` and check-in the file.
8. Upload the file without modifying any existing default values.

   You must ensure that a new version of `xchange_config.xml` file is created with the newly added changes.

15.6 Close deliverable

When the external deliverable document reaches any of the states that is cancelled or void or superseded, the plug-in will be fired to delete the deliverable in Supplier Exchange.