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OpenText™ Documentum™ Content Management for Engineering

Smart View User Guide

Manage Asset documents, workflows, transmittals, projects distribution matrix, viewer, and document loading in Smart View. Use the OpenText Core Collaboration for Engineering connector to collaborate with Suppliers.

EEGAM250400-UHD-EN-01

OpenText™ Documentum™ Content Management for Engineering
Smart View User Guide
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Chapter 1

Get started

OpenText Documentum CM for Engineering consists of two interfaces: the traditional *Classic View* interface and the *Smart View* user interface. Smart View is a responsive, title-based interface that is supported on multiple devices. This help is written for the Smart View user interface.

For a basic understanding on the usage of OpenText Documentum CM Smart View, you can refer to the steps documented in *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)*.

1.1 Keyboard navigation and accessibility

OpenText Documentum CM for Engineering supports keyboard navigation to provide users with an alternative way of performing functions that are normally performed using a mouse.

Note: For some functions, keyboard navigation may change to Mouse Keys, which allow you to use the numeric keypad on your keyboard to move the pointer.

Table 1-1: General keyboard shortcuts

Shortcut	Action
TAB	Moves to the next interactive item.
SHIFT+TAB	Moves to previous interactive item.
Left arrow	Moves to the previous item in a menu or list, or leaves the menu.
Right arrow	Moves to the submenu.
Down arrow	Moves to the next line in a list or menu, or to the next entry if there is no submenu.
Up arrow	Moves to the previous line on a list or menu. For tables, moves to the previous item in the same column.
ENTER	Applies the edit mode to fields. For buttons or menus, executes the associated actions.
SPACE	Activates fields such as check boxes or radio buttons.
ESCAPE	Closes a list and leave edit mode.

Table 1-2: Dialog box or overlay keyboard shortcuts

Shortcut	Action
TAB	Moves to the next interactive item
SHIFT+TAB	Moves to the previous interactive item
Left arrow	Moves to the previous item
Right arrow	Moves to the next item
Down arrow	Moves to the same position on the next line
Up arrow	Move to the same position on the previous line

Table 1-3: Tree view navigation in a doclist

Shortcut	Action
ENTER	Select a node and display its contents in the right-hand pane, or activate **Show more** or **Show less** controls.
Left arrow	Collapse a node to hide sub items.
Right arrow	Expand a node to access sub items.
Down arrow	Moves to the next item in the tree view.
Up arrow	Move to the previous item in the tree view.
HOME	Move to the top of the tree view.
END	Move to the bottom of the tree view.

1.1.1 Accessibility

Accessibility mode is required for screen reader users. This mode improves the compatibility of the HTML with screen readers through modified scrollbars, tables, and messages. Tables and page structures are adapted to a less complex structure, allowing screen readers to easily handle and present data. When you enable accessibility mode, the browser's native scrollbars are used and header messages persist on the interface until you close the message or refresh the page.

When you enable accessibility mode, the option is only enabled for you.

Note: If you use a screen reader software, OpenText recommends that you enable this mode. However, if you do not use screen reader software, OpenText recommends that you do not enable this mode due to the less structured layout in certain scenarios.

Accessibility mode is supported in the Smart View user interface. It is not supported on the Classic View and Administration interface.

1. On the **Profile Menu**, click your user name, and then click the **Settings** tab.
2. In the **Accessibility** area, select the **Accessibility compliant mode** check box.

1.2 Home page

The OpenText Documentum CM for Engineering **Home** page is the starting page that you access when you sign in. The goal of the **Home** page is to provide you with easy access to functionality that is specific to your needs.

The **Home** page is made up of several smaller sections, called *tiles*. The tiles that appear depend on how the system is configured, and may differ from other default pages. Because the **Home** page can be customized, the tiles you see may differ from the default tiles described in this help.

Tip: After navigating away from the **Home** page, return to it by clicking the logo on the **Header Bar** or by clicking the **Home** icon in the breadcrumb trail.

1.3 Tiles overview

The OpenText Documentum CM for Engineering Landing or Home page tiles that appear depend on how the system is configured, and may differ from other default pages. The names of the tiles can be configured by your administrator. Default tile names appear here.

Common tile elements

Search
On the Landing page header, Search might be configured so the search field always appears, or you might need to click the **Search** button to enter your term. From the landing page, you can perform a simple search on the entire repository. Details of the search methods are configured by your administrator.

Within **tiles and other containers**, you can perform a simple search to quickly locate items by clicking the **Search** button in the header, and typing the name or partial name of an item you want to find. The Smart View Client will ask you if you want to search your current locations or sub locations or the entire repository.

Once you have performed a search, you can search the entire repository or within your current results. In the results list, you can select single or multiple items to **Share** (through emailed links or external services), **Copy Link**, **Download**, or **Print** for example.

Some doclist tiles allow you to isolate your search to certain list columns, such as **Name** or **Status**. Click the icon in the column heading to activate that focused search.

Maximize
Maximize the tile. Additional functions may be available for tiles when they are expanded.

Inline Action Menu (in minimized tiles)
Some minimized tiles that display individual items (such as the **Favorites** tile), feature Inline Action Menus that allow you to perform actions on items by positioning your pointer over an item and clicking the **More actions** button •••.

Note: The actions available in the Inline Action Menu for minimized tiles is limited. Maximize the tile to see the full list of actions.

Columns Settings
Rearrange the order of the columns in the tile's doclist view by dragging and dropping the column titles in the Columns Settings list. Click the **Remove** button beside a column title to remove it. Click the **Add** button to choose a new column title.

Enable **Show all versions** to include all of the various versions of the documents in the doclist. Turning off this option will restrict the view to the current document only.

Favorite
Click the **Favorite** icon to select/clear your current folder as a favorite.

Comment
Click the **Comment** icon to make a user comment at the folder or item level.

The **Landing Page** contains the following default tiles:

- **Document list**: The Document list tile allows you to browse through and search the areas of the OpenText Documentum CM for Engineering repository that your administrator has granted access.

  Click the cabinets and folders that comprise the repository to drill down to content.

  The **Folders** view shows the folders and documents that you can access. When you select a folder on the Folders tab, the documents within that folder appear in the Document list.

  Note that you might not have access to all levels of the repository.

- **Searches**: The Saved Searches tile allows you to access the OpenText Documentum CM for Engineering repository search queries that you or others have saved. The queries are grouped within the tile for easy identification, and can be searched within the tile.

  Note: Expand the tile to access the full range of features.

- **Active Projects**: The Active Projects tile allows you to perform project works in an OpenText Documentum CM for Engineering setup. Using this tile, you can directly navigate to the location where all available active projects exist.
- **Operations**: The Operations tile allows you to directly navigate to the location where all available operations folders exist.
- **Add file**: The Add tile allows you to create a new document in the Operations or Active Projects.
- **Upload file**: The Upload file tile allows you to upload (import) an existing document to Operations or Active Projects.
- **Task list**: The My Tasks tile contains a list of workflow tasks that other users have assigned to you. The default sort order of the tile is descending order by Sent Date, so the most recent Task is on the top of the list. Unread Tasks appear in bold type.

  Note: Expand the tile to access the full range of features.

- **Workflow overview**: Your Administrator can add a workflow monitoring tile on the Landing Page and can configure the name of the tile. It is often called My workflows. The tile features a circle graph that shows the percentage of your active workflows that are Scheduled, Running, or Paused. Other workflow tiles might allow you to search workflows in the system using a query form.
- **Checkout documents**: The Checkout documents tile shows all documents that you have checked out in the system under your current login.

  Note: Expand the tile to access the full range of features.

  Add or remove Favorites

  Click the **Add Favorite** button or the **Remove Favorite** button to add or remove an item as a Favorite.

  Search

  Click the **Search** button, then type a document name in the field.

  Cancel Checkout

  Click the Lock icon to cancel your checkout hold on a document.

- **Favorites**: The Favorites tile lists all the items you have designated as Favorite.

  Note: Expand the tile to access the full range of features.

  Remove Favorite

  Click the **Remove Favorite** button to remove an item from your Favorites list.

  Search for a Favorite item

Click the **Search** button , and then type a document name in the field.

- **Reports**: The Reports tile allows users to view the available reports templates.

1.4 Basic navigation

1.4.1 Action menus and functions

This section describes the tools and elements that are most commonly used throughout the user interface.

You can perform many basic operations on multiple items using the functions on the **Action Bar**. The **Action Bar** appears when you select one or more items in a tile or folder using the checkboxes beside the items.

When you are within a folder, items are shown in a list format, which is referred to as *Doclist View*. When in Doclist View, a group of buttons appear together on a toolbar, which is referred to as the **Inline Action Bar**. The **Inline Action Bar** appears each time you position your pointer over an item, and displays the functions that are available for that item.

Action Bar

When you select one or more items in a tile or folder, the functions you can perform on those items appear in the **Action Bar**. The **Action Bar** functions are useful when you want to perform the same action on multiple items.

The options that appear may vary by user, workspace, or tile. The most common functions are: **Copy link**, **Copy**, **Share**.

Note: The ability to Share multiple items in the doclist through email is limited. If an error message appears, limit your selection and try again. You might need to split the Share operations across multiple emails.

Inline Action Bar

The **Inline Action Bar** appears for every item when you are in Browse View. The functions available on this menu depend on the item and your permissions on that item. To show this menu, point to an item. Some additional items might be available by clicking on the **More actions** button at the end of the Inline Action bar.

Common elements in doclist view

Show repository tree

Click the **Show repository tree** button to turn on the tree view navigation interface. Click > to expand a node and access the sub-items. Click a node to display its contents in the doclist's pane.

Show Filters

Click the **Show Filters** button to switch the search facets panel on and off.

Filter options also appear when a list of files exceeds it's maximum size.

You can use wildcards when filtering lists using text. Wildcards are special characters that can stand in for unknown characters. They can help you locate items in a list or narrow down a list of items. OpenText Documentum CM client supports the following wildcards when filtering items in a list:

- `*` matches any number of characters and can be used anywhere in a string of text.

  For example:

  - `*on` finds any filename that ends with `on`, such as `acti`**`on`**.
  - `on*` finds any filename that starts with `on`, such as **`on`**`tario`.
  - `o*n` finds any filename that starts with `o` and ends with `n`, **o**pe**n**.
- `?` matches a single character and can be used anywhere in a string of text. It works like `*`, but only with a single character.

  For example, `?on` finds any three-letter filename that ends with `on`, such as `w`**`on`**.

Search
On the Landing page header, Search might be configured so the search field always appears, or you might need to click the **Search** button to enter your term. From the Landing page you can perform a simple search that searches the entire repository. Details of the search methods are configured by your administrator.

Within **tiles and other containers**, you can perform a simple search to quickly locate items within that location by clicking the **Search** button in the header  , and typing the name or partial name of an item you want to find. Smart View Client will ask you if you want to search your current locations or sub-locations, or the whole repository.

Once you have performed a search you can search the entire repository or within your current results. In the results list, you can select single or multiple items to **Share** (through emailed links), **Copy Link**, **Download**, or **Print** for example.

Some doclist tiles allow you to isolate your search to certain list columns, such as **Name** or **Status**. Click the **Search** button  in the column heading to activate that focused search.

Favorite

Click the **Add Favorite** button  to add a Favorite, or click the **Remove Favorite** button  to remove the item as a Favorite.

Show more

In a doclist, click the **Show more** button  at the end of an item's row to expand the row and show item details.

Command

Click the **Command** menu beside the item title to view the **Properties** page, or perform other available functions for the item or container. Depending on your permissions, you may also be able to copy, move or delete the item, share or copy the item's link.

Sort

Click the **Sort Ascending** button or **Sort Descending** button to sort the columns alphabetically, by date, or by size.

Columns Settings

Rearrange the order of the columns in the tile's doclist view by dragging and dropping the column titles in the Columns Settings drop-down list. Click the beside a column title to remove it. Click to choose a new column title.

Select **Show all versions** to include all of the various versions of the documents in the doclist. Deselecting this option will restrict the view to the current document only.

1.4.2 Table settings

On a page for a container, such as a folder or a workspace, **Table Settings** allows you to choose how items can appear.

List View	*List View* displays items in a list format and provides functionality on the **Inline Action Bar**. By default, the items inside a container appear in List View until the user changes the view. To switch from List View to another format, click the **Table Settings** button on the **Action Bar**. **Notes** • By default, the descriptions are hidden for each item in the container, but you can click the **Show description** button on the **Action Bar** to show the descriptions. • You can add, reorder, or remove optional columns in List View, and Pinned columns.

Pinned columns	*Pinned columns* displays items in a list format that includes the **Description** column and provides functionality in the **Inline Action Bar**. This view allows you to resize columns by dragging the column boundary in the header. To switch from Pinned columns to another format, click the **Table Settings** button  on the **Action Bar**. **Tips** • You can resize each column to a minimum width as long as it can hold its key information. For example, the minimum width of the Name column must accommodate the item name, the **Inline Action Bar**, and any state icons. • If the combined columns are wider than the screen, a scrollbar appears allowing you to scroll horizontally through the columns. • You can add, reorder, or remove optional columns in List View, and Pinned columns.

Grid View	*Grid View* displays items as a list of thumbnails. Most functions that appear on the **Inline Action Bar**, when in List View, are also available in Grid View. Additional buttons appear within each thumbnail, which allow you to quickly make the item a Favorite and to view the **Metadata** dialog. Grid View is especially useful for viewing a container with multiple image files. When you click an image thumbnail, an expanded Grid View gallery opens. Use the **Previous** and **Next** buttons to scroll through all images within that folder. You can also download, rotate, and zoom in and out on image files from the gallery. To switch from Grid view to another format, click the **Table Settings** button on the**Action Bar**. **Tips** • In the Grid View gallery, the DWG, DXF, PSD, TIF, and TIFF image file types do not render because they are not recognized as image files. • In the Grid View gallery, double-click an image to zoom in to the maximum zoom level. Press the **ENTER** key or double-click the image again to return to the default image size. • Your administrator can enable or disable the **Grid View** option, so the **Grid View** selection may not appear for all users.

Note: As long as you continue to use the same browser session, your Table setting persists until you explicitly change it, clear the browser cache, or start an incognito browser session.

1.4.3 Customize Table columns

For List View or Pinned columns, you cannot change Smart View permanent columns, which are Type, Name, Comments, and Favorite, but you can add, reorder, or remove optional columns configured by the administrator such as the following:

- Description

  Note: For List View, as long as one item on the page includes description information, the **Show/Hide Description** button appears on the **Action Bar**. In Pinned columns, the Description column appears by default.

- Modified
- Size

Note: As long as you continue to use the same browser session, your Table setting persists until you explicitly change it, clear the browser cache, or start an incognito browser session.

From either List View or Pinned columns, click the **Table Settings** button on the **Action Bar**, then click **Column settings**.

- **Add a column**

  On the **Columns** sidebar, click **Edit**. In **Edit columns** mode, click each column name to add or clear your selection as indicated by a check mark, then click **Update**. Confirm your selections by clicking **Apply**.

  Note: You cannot clear Smart View permanent columns: Type, Name, Comments, and Favorite.

- **Remove a column**

  On the **Columns** sidebar, point to a column name, then click the **Remove** button . When you are finished, click **Apply**.

  Tip: You can also remove columns by clicking **Edit** on the **Columns** sidebar. In **Edit columns** mode, click on a column name to clear the check mark and then click **Update**. Click **Apply** to confirm your selections.

  Note: You cannot remove Smart View permanent columns: Type, Name, Comments, and Favorite.

- **Reorder a column**

  On the **Columns** sidebar, point to a column name, then use the drag handles to move the column to its insertion point. When you are finished, click **Apply**.

  Note: You cannot reorder Smart View permanent columns. Type and Name are always the first columns; Comments and Favorite are always the last columns.

- **Reset to default**

  On the **Columns** sidebar, click **Reset to default**. Click **Apply** to confirm your selection.

1.4.4 Open items with a viewer

When you click an item, it opens in a viewer. If the item's file type is not supported by your viewer, you are prompted to download it. When prompted to download an item, select the option to save your preference to skip this message in the future. To change this preference, delete your browser's saved data.

Note: Several viewers are available for use in the Smart View client, and are configured by your administrator. The features listed below are applicable to the default BravaCSR viewer. There is also the Brava! Enterprise Viewer that is configured by your administrator. Contact your administrator to determine which viewer is available to you. Click the viewer's **Help** button for more information on supported tools.

If configured by your administrator, you can open content in an in-place viewer by positioning your pointer over content and clicking **View** in the Inline Action Menu. In the Inline Action Menu, click the **More actions** and select **Open in Brava! Viewer** to view the content using Brava! Enterprise Viewer.

Documents with multiple pages have thumbnails available for quicker access to a specific page. Click the **Toggle panel** button to show or hide the page thumbnail views. The Viewer provides additional tools for viewing certain document types.

Click the icon in the viewer header to close the viewer and return to the OpenText Documentum CM for Engineering Smart View.

BravaCSR Viewer general icons

Selection
Click to select the pointer selection mode of the viewer: **Native text select**, which allows you to select text in the document, **Pan the page**, which allows you to move the page around the screen, and **Zoom region**, which allows you to zoom a rectangular selection area on the page.

Export Document
Download the document you are viewing to your local machine.

Zoom Out/Zoom In
Zoom in or out on contents of the window.

Fit All
Reduce size to fit entire page into the window.

Fit Width
Fit contents to width of the window.

More
Show more viewer functions such as **Close** and **Page display settings**.

Toggle Full Screen
Switch the viewer to full screen mode, which dismisses the browser header.

Print
Print the current document. In some cases, an overlay or watermark might appear on the output.

Search
Perform a search of the current document by entering a search term.

1.5 User settings

1.5.1 Change your user settings

The Smart View allows you to change certain user settings within your user profile to personalize the client's behavior and user interface. On the Landing page header, click **Profile Menu** and select **User settings**.

Note: Some of the settings described here might be restricted or controlled directly by your administrator.

User profile image

By default, your user profile image appears as your user initials, but you can replace these with an image from your computer. Images must be 5 MB in size or smaller. Standard image formats such as `.bmp`,`.jpeg`,`.jpg`,`.png`,`.gif`,`.svg` are supported, but can be limited by your administrator.

Note: If you are selecting an image for the first time, in **User settings**, click the circle with your initials and choose an image from your computer.

If you want to change an existing image, in **User settings**, position your pointer over the profile image, click , then click **Upload Picture** to select a replacement image, or **Delete Picture** to remove the current image and return to user initials.

Add-on

Turn on the **Enable Documentum Client Manager** switch to install and use the OpenText Documentum Content Management (CM) Client Manager add-on, which includes enhanced convenience features. Your administrator might restrict access to this switch, which means your client will use the add-on mode that the administrator defines.

When the Add-on is off, or if you have not updated the Add-on when a new version is available, the OpenText Documentum CM for Engineering Smart View is in Thin mode and features rely on browser capabilities.

When you turn on the **Enable Documentum Client Manager** switch for the first time, an installation banner will appear at the top of your screen. Click **Install**.

When the add-on is installed correctly, you can click the **?** button to show the version number.

Note: The OpenText Documentum Content Management (CM) Client Manager add-on is updated periodically when you log into the OpenText Documentum Content Management (CM) for Engineering Smart View Client. An upgrade banner will appear at the top of your screen when a new version is available. Click **Upgrade**.

Sort options

Turn on the **Enable grouping of folders before files** switch to enable the Smart View to sort and group doclist folders first, followed by files.

Accessibility

Turn on the **Accessible compliant mode** switch to improve the usability of accessibility aids such as screen readers. Turning on this mode configures the user interface in the following ways:

- Enables persistent pop-up messages.
- Enables browser's default scrollbar.
- Enables fixed horizontal column view in list views.
- Disables the Inline Action Toolbar.
- Displays share and state columns in file lists.
- Displays summary column in search results.

Language

By default, the language of the OpenText Documentum CM for Engineering Smart View will be set to your web browser language. To change the language, position your pointer over the **Default Language** field and click the **Edit** button . Changes to this setting will take effect when you close the client and log back in.

1.6 Basic operations

1.6.1 Consumer workspace

The Consumer (Readers) workspace is a three-column layout.

The Consumer workspace provides:

- *Searches*: The primary means of reader access, Searches enables simple or advanced search followed by access to prior searches, saved searches, and provided searches (public or by sub-category).
- *Facets*: Automatically displays in response to searches, showing faceted tallies of the search results.

- *Folders*: Displays the visible cabinets and folders in the asset repository.
- *Document list*: Displays the results of executed queries or selected folders.
- *PDF Preview*: Displays a watermarked PDF rendition of the selected document.
- *Relations*: Displays all relations to a selected document or folder grouped by relation type.

The columns in the Document list may be altered or extended as configured by the application.

The results of a simple search on the word `test` shows all documents with properties or content that matches `test`. The matched text is highlighted in yellow. The Facets tallies the matches by status, document type, facility, and asset family.

Selecting a facet filters the results (to the count shown), displays the selected facet below the `test` entered simple search box, and re-tallies Facets to reflect the selected facet and the remaining matching facets.

1.6.2 Find Documents using Public Searches

Public searches show configured searches that are accessible to all users. Public searches can be fixed or require you to enter the search parameters.
To execute a public search that requires parameters:

1. Click the **Searches** tile.
2. In the **Searches > Public searches** page, double-click a search query, such as the **Find Documents based on Asset class** search query.
3. In the **Find Documents based on Asset Classification** dialog box, select the required values for **Facility** and **Document Status**.
4. Click **Search**.

Document list shows the documents that matches the entered values.

1.6.3 Find Documents using Simple Searches

Simple search finds documents with properties or content that match the entered text string. To execute a simple search that requires parameters:

1. Click the **Searches** tile.
2. In the **Searches > My searches** page, double-click a search query.
3. In the **Find Documents based on Asset Classification** dialog box, select the required values for **Facility** and **Document Status**.
4. Click **Search**.

1.6.4 Find Documents using Facets

The Facets tab displays tallies of documents matching the search query.

A facet is an itemized and tallied summary of matches by attribute. A facet contains itemized tallies of search matches and enable the filtered refinement of search results. Facets enable searches that initially yield too many results. For example, general search and help discover relate information with common classifications. Facets are only useful when they provide usable selections. Whenever you plan to add a nested facet, you must ensure that the nested facets must be intuitive to the user in the level(s) that follow. Whenever you perform a search, the focus automatically shifts to the **Facets** tab. The **Facets** tab displays the list of documents based on the search query.

The faceted navigation includes two components, a Facets widget and a breadbox in the Document List widget. The Facets widget allows the search refinement in a dynamic facet list. Facets are grouped by category and ordered based on the configuration or advanced search settings.

The Document List widget contains the breadbox to display the facet selections in the same order it is used for refinement. The breadbox is hidden if no facet values are selected or if all the values are cleared. The facets are categorized as standard and structured facets. The standard facets are single selection facets. The structured facets are hierarchical and are configured in client configuration to define their structure. When a user selects a facet value in the Facets widget, all the facets are refreshed. The selected category reflects the selected facet value and removes the other facet values. A new set of facets available for the new results is displayed.

For more information about faceted search, the search ratings, and results, see *OpenText Documentum Content Management - Smart View User Guide (EDCCL-UGD)*.

1. Click the **Document list** tile.
2. In the search box, type the name of the document you want to search for and press **ENTER**.
3. Click the **Facets** widget to view the faceted search results.

You can further filter the Facets tab by selecting the required category. Based on the category you select, it automatically adds to the Document list tab.

1.6.5 Browse Folders

The **Show repository view** shows the folders and documents that you can access. When you select a folder in the Folders tab, the documents within that folder appear in the Document list.

1.6.6 View Document Properties

To view the document properties, point to any of the document in the **Document list** page, and click the **Properties** button  to view the properties.

1.6.7 Download the Document

To download a copy of the document to your computer, select a document and click **Download** from the header menu.

1.6.8 View Document Renditions

The Viewer displays the PDF rendition of the selected document. The Viewer displays a message if a PDF rendition is not found for selected document.

1.6.9 View Document Relations

The Relations page displays a list of what is linked to the selected content.

1.6.10 Export Folder Contents or Query Results to Microsoft Excel

You can export the list of files in the Document List to a Microsoft Excel spreadsheet.

1. Select a document and click **Export properties** from the header menu.
2. Select a location for the file on your local file system.

Chapter 2

Document management

2.1 Operations – Asset Document

2.1.1 Create an asset document

You can create new content in OpenText Documentum CM for Engineering if your administrator has granted you the permission and has established certain content templates.

Depending on your client configuration, you can add new content using a dedicated **Add file** tile on the Landing page, or from an **Add** menu in a folder.

Create an asset document:

1. Sign in with author credentials. For example, **ao_author**.
2. On the Landing page, click the **Add file** tile. In a folder, click the **Add item** button +, and then click **Add file**.

   Depending on your configuration, the following screens might appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk:

   a. **Create type**: This screen allows you to choose the type of content to add, through the selection of various Creation Profiles.

      Select a Creation Profile that will be used for all of the files you queued for upload from the Category list. For example: Asset document.

   b. Select an AO Document Type that will be used for the files. For example: Cat1 Controlled Document, Cat2 Controlled Document, or Cat3 Controlled Document.

   c. Generally, files that you add inherit some properties from the selected folder or content to which you are uploading (or carry forward properties from the files themselves), but it also be possible to inherit metadata from other locations or items in the repository.

   d. To do this, select the content you want to inherit from, using the **Use source content** field.

      i. Navigate to the **Operations** cabinet.

      ii. Select the check box next to the required asset folder or at the content level.

      iii. Click **Add**.

      iv. Select the check box in the **As Blueprint For** section to choose the target metadata category (for example, Properties, Content).

3. In the Classification and Assets area, complete all fields marked with a red asterisk.
4. In the **Projects/Process Info** area, select the response date.
5. Click **Continue** to complete the creation process.

   A message appears in the header when your new content has been created. Click the **Go to overview** message for more information.

2.1.2 View document status

You can view the progress of a document in the document properties.

View the status of the document:

1. Click the **Document list** tile.
2. To view the document properties, point to any of the document on the **Document list** page, and click the **Properties** button  to view its properties.
3. On the **Process Info** area, you can view the control category of the document and its status.

2.1.3 Import a file

You can import existing content into OpenText Documentum CM for Engineering if your administrator has granted you permission.
Depending on your client configuration, you can import content using a dedicated Upload tile on the Landing page, or from the **Add** menu in a folder.

Import or upload a file:

1. Sign in with author credentials. For example, **ao_author**.
2. From the Landing page, click the **Upload file** tile.
3. In the **Upload** dialog box, click the **Upload files** button  , or drag content into the main folder or subfolders in the browser window. The Upload dialog box, summarizes the files that are already queued for upload, and allows you to upload additional content.
4. To add additional files, drag them into the panel, or click the **Upload files** button  , and select them from your computer. You can also rearrange the upload processing order of the files by dragging them to new spots in the **Upload** list.
5. Click **Continue**.

6. Depending on your configuration, the following screens might appear, requiring you to describe the content you are adding.

   a. Select a Creation Profile that will be used for all of the files you queued for upload from the Category list. For example: Asset document.

   b. Select an AO Document Type that will be used for the files that you queued for upload. For example: Cat1 Controlled Document, Cat2 Controlled Document, or Cat3 Controlled Document.

   c. Generally, files that you upload inherit some properties from the folder to which you are uploading (or carry forward properties from the files themselves), but it might also be possible to inherit metadata from other locations or items in the repository.

      To do this, select the content you want to inherit from using the **Use source content** field.

      Note: This step is mandatory if you are creating a new document using the **Upload file** tile.

   d. Navigate to the **Operations** folder and select the required asset and then select the sub folder and click **Add**.

7. Click **Continue** to upload the files.

8. In the **Classification and Assets** area, complete all fields marked with a red asterisk.

9. In the **Projects/Process Info** area, select the response date.

10. Click **Continue** to complete the import or upload process.

    At the end of the process, the file is imported and a message appears in the header. Click the **Go to overview** message for more information, which can include the location of your imported document.

2.1.4 Create a Category 1 (CAT1) Document

OpenText Documentum CM for Engineering provides a consistent way for creating any type of document by using a defined set of approved templates. During the document creation process, you can assign the required membership access. Assigning the right role gives the right access for the document's review, approval, and acknowledgement. In addition, all of these documents can be retrieved quickly by using facets.

The following are the three different types of asset documents:

- CAT1 – Restrictive document with elaborate workflow. Consists of Review, Approval, 2nd level Approval, Release Pending, and Effective.
- CAT2 – Similar to CAT1 without the 2nd level Approval state and with Reviewer role as optional.
- CAT3 – Self approve the document with or without review or with Reviewer role as optional.

Create a CAT 1 Document:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Select **Operations**, click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Asset Document**.
5. In the **AO Document Type** list, select **'Cat 1' Controlled Document**.

   The **Use source content** details and the **Properties** check boxes are selected by default.
6. Click **Continue**.
7. In the **Edit Properties** dialog box, specify the other relevant details:
   a. In the **Title** box, type the title.
   b. Click **Classification** and in the **Organization** area, select the required **Corporation**, **Organization**, **Function**, and **Sub-Function** details.
   c. In the **Document Type** area, select the required **Category/Family**, **Name**, **Subtype Name** and **Discipline** details.
   d. In the **Drawing** area, in the **Drawing Number** box, type the drawing number and in the **Sheet Number** box, type the sheet number.
   e. Click **Close** button <.
   f. Click **Assets**. In the **Asset** area select the required **Facility**, **Area**, **System** and **Sub-System** details.
   g. In the **Equipment** area, select the required **Family**, **Function**, **Equipment Tags** details and in the **Type** box, type the name of the type of equipment.
   h. In the **License** area, select the required **License Type**, **License Number**, and **License Name** details.
   i. In the **Location** area, in the **Latitude** and **Longitude** boxes, type the longitude and the latitude details.
   j. Click **Continue**.
8. In the **Select template** dialog box, select the check box of the relevant template, and then click **Continue**.
9. In the **Edit file** dialog box, click **Close**.

   The Asset Operation creates a new CAT1 document with the Draft status.
10. To send the CAT 1 document to the review/approval process, position the pointer over the new CAT 1 document and click the **More actions** button ••• on the **Inline Action Bar** and click **Send to workflow** > **Submit for Review / Approval**.

For more information about workflow process properties, see *OpenText Documentum Content Management - Workflow Designer User Guide (EDCPKL-AWF)*

11. In the **Submit for Review / Approval** dialog box, in the **General** area, type notes in the **Note** box.
12. Click **Next** or **Performers** area.
13. In the **Performers** area, select one or more required **Document Reviewers**, **Document Approvers**, **2nd Approvers** and **Document Coordinators**.
14. Click **Next** or **Documents** area.
15. In the **Documents** area, click **Next** or click **Schedule**.
16. In the **Schedule** area, in the **Plan** area, choose the **Launch on** date, **Due** date, and if required select the **Send notification when the workflow starts** check box. In the **Follow-up** area, choose **Send notification if not ended by date**.
17. Click **Finish**.

    A Submit for review/approval process is started notification message appears and the CAT1 document status changes to **For Review**.

2.1.5 Delete and restore a document

To delete a document in the OpenText Documentum CM client, you must install the D2-Bin plugin, which adds recycling bin capabilities. For more information, see *OpenText Documentum Content Management - Client Installation Guide (EDCCL-IGD)*.

Note: The actions that you can perform on a document depends on the lifecycle state.

Delete and restore a document:

1. Click the **Document list** tile.
2. In the Document list, navigate to the folder where the document you want to delete resides.
3. Select the draft document and click the **More actions** button *** on the **Inline Action Bar**, then select **Delete**.
4. In the **Delete** notification box, select one of the following options:
   - **Delete original file and all it's links**: Deletes the current version of the document.
   - **Delete original file and all versions**: Deletes all major and minor versions of the document.
5. Click **Delete**. The document is deleted and placed in the Recycle Bin.

6. To restore a deleted document, in the **Recycle Bin**, right-click the document and click **Restore**.

   Note: Documents that are purged from the Recycle Bin cannot be restored. Only users in the `ao_admins` role can purge the Recycle Bin.

2.1.6 Create an Asset Controlled Procedure

1. Sign in with project controller credentials. For example, **ao_proc_author**.
2. Click the **Document list** tile.
3. Click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Asset Controlled Procedure**.
5. In the **AO Controlled Procedure Type** list, select the required AO controlled procedure, and then click **Continue**.
6. Optional In the **Use source content** field, click the **Browse** button and in the **Select** dialog box, select the check box of the required folder, and then click **Add**.
7. Click **Continue**.
8. In the **Edit Properties** dialog box, specify the other relevant details:
   a. In the **Title** box, type the title.
   b. Click **Settings**, select the required **Stakeholders**, **Distribution** details and choose the **Target Date**. In the **Owner** box, type the owner details.
   c. In the **Review Period** area, select the **Months** and **Years**.
   d. Click **Scope**, in the **Organization Scope** area, select the required **Corporation**, **Organization**, **Function**, and **Sub-Function** details.
   e. In the **Region Scope** area, select the required **Procedure Region**.
   f. In the **Asset Scope** area, select the required **Facility**, **Area**, **System**, and **Sub-System** details.
   g. In the **Equipment Scope** area, select the required **Family**, **Function**, and **Equipment Tags** details.
   h. In the **Business Process Scope** area, select the required **Process**, **Subprocess**, **Process Function**, and **Process Subfunction** details.
   i. Click **Access** and in the **Levels of Approval** list, select the level.
   j. Click **Coordinators** and in the **Coordinators** list, select the required one or more coordinators, and then click the **Close** button <.
   k. Click **Authors** and in the **Authors** list, select the required one or more authors, and then click the **Close** button <.

l. Click **Reviewers** and in the **Reviewers** list, select the required one or more reviewers, and then click the **Close** button .

m. Click **Approvers** and in the **Level One Approvers** list, select the required one or more approvers (level of the approvers is based on the level selected in step i. For example, if you selected level 2, select the **Level Two Approvers** from the list and if you selected level 3, select the **Level Three Approvers** from the list).

n. Optional Click the **TBR Distribution** List, in the **Recipients** list, select the required one or more recipients.

o. Click **Continue**.

9. In the **Select template** dialog box, select the check box of the relevant template.

10. Click **Continue**.

11. In the **Edit file** dialog box, click **Close**.

    An Asset Operation Controlled Procedure is created.

12. Click **Go to overview** from the notification message that is displayed immediately after an asset controlled procedure is created and click **Open**.

13. Go to **Operation** > **Folder**.

14. To send the document to the review/approval process, position the pointer over the newly created asset controlled procedure and click **More action** button *** on the **Inline Action Bar** and then click **Send to workflow** > **Submit for Review / Approval**.

15. In the **Submit for Review / Approval** dialog box, in the **General** area, type notes in the **Note** box.

16. Click **Next** or **Performers** area.

17. Click **Next** or **Documents** area.

18. Click **Next** or click **Schedule**.

19. In the **Schedule** area, in the **Plan** area, choose the **Launch on** date, **Due** date, and if required select the **Send notification when the workflow starts** check box. In the **Follow-up** area, choose **Send notification if not ended by date**.

20. Click **Finish**.

    A Submit for review/approval process is started notification message appears and the document status changes to **For Review**.

2.2 Active Projects – Project Document

You can create a new project document according to the defined project configurations.

Project documents contain the following attributes:

- document_type is set to Project Document
- ao_doc_type_classification is further classified into Internal and External
- Lifecycle and workflow are applied based on the document classification

Prerequisites for creating a project document are as follows:

- Project must be in active state.
- User must be a project author. Verify the project configuration membership to find the project authors.
- Content template must be in the Effective state.
- A creation profile for the new project.

2.2.1 Create a project document

1. Sign in with author credentials. For example, **ao_author**.
2. Click the **Active Projects** tile on the OpenText Documentum CM for Engineering Landing page.
3. In the Active Projects folder, navigate to a project folder, click the **Add item** button +, and then click **Add file**.

   Depending on your configuration, the following screens might appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk:

   a. **Create type**: This screen allows you to choose the type of project content to add, through the selection of various Creation Profiles.

      Select a Creation Profile from the Category list that will be used for all of the files you want to add. For example: G89471–Pump Replacement.

   b. Select a Project Document Category that will be used for the project document creation.

   c. Select a Project Document Type that will be used for the project document creation. For example: Analysis, Bill of Materials.

   d. Generally, files that you add inherit some properties from the folder you are adding to (or carry forward properties from the files themselves), but it might also be possible to inherit metadata from other locations or items in the repository.

      To do this, click **Use source content**, then navigate to the **Active Projects** cabinet, select the required project, and then click **Add**.

Note: This step is mandatory if you are creating a new document by using the **Add file** tile.

e. Select the check box in the **As Blueprint For** section to choose the target metadata category (for example, Properties).

4. Click **Continue**.
5. In the **Edit Properties** area, select **External** or **Internal** for the Source.

Note: Select PO Number, if you want to share the external project document with OpenText Core Collaboration for Engineering.

6. Click the **Classifications** area.
7. In the **Classification** area, the Facility and Project details are selected by default based on the project folder that you selected in Active Projects.

   In the **Assets** area, Asset details are selected by default.
8. In the **Classification** and **Assets** area, complete all fields marked with a red asterisk.
9. Select the **Issue Reason**.
10. Select a suitable **Planned Date**.
11. Click **Continue** to complete the project document creation process.

    A message appears in the header when your new project document has been created. Click the **Go to overview** message for more information.

2.2.2 Upload a new project document

You can import or upload an existing project document.

Upload a project document:

1. Sign in with author credentials. For example, **ao_author**.
2. From the Landing page, click the **Upload file** tile.
3. In the **Upload** dialog box, click the **Upload file** button  , or drag content into the main folder or subfolders in the browser window. The Upload area summarizes the files that are already queued for upload, and allows you to upload additional content.
4. To add additional files, drag them into the area, or click the **Upload file** button +, and select them from your computer. You can also rearrange the upload processing order of the files by dragging them to new spots in the **Upload** list.
5. Click **Continue**.

6. Depending on your configuration, the following screens might appear, requiring you to describe the content you are adding:

   a. Select a Creation Profile that will be used for all of the files you queued for upload from the Category list. For example: Project Folder.

   b. Select a Project Document Category that will be used for the project document creation.

   c. Select a Project Document Type that will be used for the files that you queued for upload. For example: Analysis

   d. Generally, files that you upload inherit some properties from the folder to which you are uploading (or carry forward properties from the files themselves), but it might also be possible to inherit metadata from other locations or items in the repository.

      To do this, select the content you want to inherit from using the **Use source content** field.

      Note: This step is mandatory if you are creating a new project document using the **Upload file** tile.

   e. Navigate to the **Active Projects** folder and select the required project folder and click **Add**.

7. Click **Continue** to upload the files.

8. In the Edit Properties area, select **External** or **Internal** for Source.

   Note: Select PO Number, if you want to share the external project document with OpenText Core Collaboration for Engineering.

9. Click the **Classifications** area.

10. In the **Classification** area, Facility and Project details are selected by default based on the project folder that you selected in Active Projects.

    In the **Assets** area, Asset details are selected by default. Complete all fields marked with a red asterisk.

11. Select the **Issue Reason**.

12. Select a suitable **Planned Date**.

13. Click **Continue** to complete the project document creation process.

    A message appears in the header when your new project document has been created. Click the **Go to overview** message for more information.

2.3 Configure content templates

2.3.1 Import a content template

Creating new project documents requires a corresponding Effective content template.

Import a content template:

1. Sign in with project controller credentials. For example: **ao_doc_coordinator**
2. Click the **Active Projects** tile.
3. In the Active Projects folder, click the **Add item** button +, and then click **Upload file**.
4. In the **Upload** dialog box, click the **Upload files** button + or drag content into the main folder or subfolders in the browser window. The Upload panel appears, which summarizes the files that are already queued for upload, and allows you to upload additional content.
5. Click **Continue**.
6. Select **Project Content Template** for category, and **Content Template** for AO Admin Artifacts.
7. Click **Continue**.
8. In the **Edit properties** area, do the following:
   - Optional: Revise the name from the file name with extension.
   - Type the title.
   - Select the required facility.
   - Select all applicable artifacts that uses this template.
9. Click **Continue**.

   The content template is autofiled in the facility folder in a content templates subfolder.

   Note: You must change the content template state to effective for the content template to be selectable by authors of new project documents.

2.3.2 Import a transmittal coversheet template

A Project controllers can create coversheet for transmittals in a project. For the coversheet template, you can use transmittal or project transmittal artifacts.

A Project controller can import coversheet templates that can be used by multiple projects in a facility. You can associate these with a transmittal or a transmittal template to generate coversheets. By default, the coversheets are applicable for **Project Transmittal** or **Project Transmittal Template** artifacts.

Import a transmittal coversheet template:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Active Projects** tile.
3. In the Active Projects folder, navigate to a project folder, click the **Add item** button + and then click **Upload file**.
4. In the **Upload** dialog box, click the **Upload files** button +, or drag content to the main folder or subfolders in the browser window.

   Note: The coversheet template must be a Microsoft word XML document (.doc). Select `MS Word 4.x, 5.x (DOS)` or `MS Word 4.x, 5.x (MacOS)` or `MS Word Document 2007/2010/2013/2016` formats.

5. Select **Project Content Template** for category, and **Project Transmittal Coversheet Template** for artifacts.
6. Click **Continue**.
7. In the **Edit properties** area:
   - Optional: Revise the name from the file name with extension.
   - Type the title.
   - Select the required facility.
   - Select all applicable artifacts that uses this template.
8. Click **Continue**.

   You can find the imported coversheet template with draft status in the Transmittal Template folder under the Facility set.

   To make the coversheet available for use, you must change the status of the coversheet to Effective.

2.3.3 Create a project transmittal template

The Project controller creates a project transmittal template for a facility. You can use this template across all the projects under this facility. Transmittal templates are managed by forms managers and accessible by forms users.

Create a project transmittal template:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Active Projects** tile.
3. In the Active Projects folder, navigate to a project folder, click the **Add item** button +, and then click **Add file**.
4. In the **Create Type** dialog box, select **Project Transmittal** for Category.
5. Select **Project Transmittal Template** for transmittal category.
6. Click **Continue**.
7. In the **Transmittal Info**, select the required option for **Issued for Reason**, **From**, and **To**.
8. Click **Continue**.
9. In the **Edit file** dialog box, click **Edit now** or **Edit later**, as required.
10. Click **Close**.

    A new project transmittal template gets created with the status of Being Prepared. To make the project transmittal template available for use, you must change the status to Effective.

Chapter 3

Searches

3.1 Search for content

The **Searches** page lists all your saved and public searches, grouped by categories. You can view the available categories. When you select a category, all sub-categories and searches saved under that category are listed on the main page.

3.1.1 My last saved search

My last saved search provides the details of the recently viewed searches. Select the required name and click **Properties** to view the search output details.

3.1.2 Find Documents based on Asset class

While using the OpenText Documentum CM for Engineering, you can find documents based on the asset class.

To find documents based on Asset class:

1. On the expanded view of the **Searches** tile, select **Find Documents based on Asset Class**.
2. Select the required facility.
3. Select the required area.
4. Select a suitable sub system.
5. Select a suitable document status.
6. Click **Search**.

3.1.3 Find My Documents that have Change Request by Document Coordinator

To find my documents that have change request by document coordinator:

1. On the expanded view of the **Searches** tile, select **Find My Documents that have Change Request by Document Coordinator**.
2. Select the required document coordinator.
3. Click **Search**.

3.1.4 Find Outstanding task participants

1. On the expanded view of the **Searches** tile, select **Find Outstanding Task Participants**.
2. Select the required document name.

   Note: This query form retrieves the users who have permission to work on a document that is currently in a workflow.

3. Click **Search**.

3.1.5 Find Outstanding TBR documents

1. On the expanded view of the **Searches** tile, select **Find Outstanding TBR Documents**.
2. Select the required document coordinator.
3. Click **Search**.

   You can refine the search again based on your requirement.

3.1.6 Find project working copy

To find project working copy:

1. On the expanded view of the **Searches** tile, select **Find Project Working Copy**.
2. Select a required project title.
3. Select project number.
4. Select document status.
5. Click **Search**.

   You can refine the search again based on your requirement.

3.1.7 Find registration based on Asset

To find registration based on Asset:

1. On the expanded view of the **Searches** tile, select **Find Registration based on Asset**.
2. Select a required facility.
3. Click **Search**.

   You can refine the search again based on your requirement.

3.1.8 Show current workflow progress

To show current workflow progress:

1. On the expanded view of the **Searches** tile, select **Show Current Workflow Progress**.
2. Select a document name.
3. Click **Search**.

   You can refine the search again based on your requirement.

3.2 Advanced Search

Advanced search allows you to search the repository using complex search criteria. To access advanced search, click on the search bar and then click **Advanced search**. Any options you select in the search drop-down are carried into your advanced search options. You can also access advanced search options through various search or saved search tiles. Also, depending on how an advanced search was configured, you might be prompted with advanced search options when running a saved or previous search.

The Advanced search panel has the following groups of options:

- Save: This section allows you to save your advanced search.
- Types: Search based on object types.
- Search: Search based on numerous options.
- Display: Customize the appearance of your search results.

The Advanced Search uses the existing attributes defined in client configuration. The existing attribute values can be linked to a DQL query or to a Dictionary. The Dictionary contains the actual values that will be seen when the users invokes the respective attribute within quotes in the Properties search.

The Property search accepts the SQL query block that contains one or more conditions. The group expression can be concatenated by using AND / OR expression with parenthesis or a relation expression or a unary expression.

For example:

- `"Format"=pdf AND ("ACL Name" CONTAINS hr OR "Application Type" ENDS WITH Box)`
- `("Format"=pdf AND "ACL Name" IS NOT NULL) AND ("ACL Name" CONTAINS hr OR "Application Type" ENDS WITH Box)"`

For more information about Advanced Search, see *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)*

Chapter 4

Change request and notice

4.1 Create a change request

You can create change requests for creating and updating controlled procedure documents and asset document.

Create a change request:

1. Sign in with your project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. In the OpenText Documentum CM for Engineering repository, select **Operations**, click **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Change Management**.
5. In the **AO Document Type** list, select **Change Request** and then click **Continue**. The **Use source content** details and the **Properties** check box are selected by default.
6. In the **Edit Properties** dialog box, do the following:
   a. Click **Change Request Summary** and in the **Reason Code** list, select the relevant reason code.
   b. In the **Description** box, type the description and in the **Keywords** list, select one or more keywords.
   c. Turn on the **Revisions Required** switch if the change request refers to existing documents in the repository that need to be updated.
   d. Click **Close** button <.
   e. Click **Process Info**, click **Raisers** and in the **Raised By** list, select the required people responsible for entering the details of the required changes in the Change Request.
   f. Click **Continue**.
7. In the **Select template dialog** box, select the check box of the relevant **AO Change Request Template**, and then click **Continue**.
8. In the **Edit file** dialog box, click **Edit now** or **Edit later** or **Close** as per your requirement.

   You can view the new change notice created in the **Change Requests** folder.
9. Navigate to **Operations** > **Discipline** > **Folder** > **Document**.

10. To attach the document to the change request, select the check box of the document that is in **Effective** state and click **Attach to Change Request**. Alternatively, Position the pointer over the document and click **Attach to Change Request** button on the **Inline Action Bar**.

11. In the **Attach CR Dialog** dialog box, in the **Select Change Request** list, select the relevant change request and then click **OK**.

12. Clear the selected check box of the document that is in **Effective** state in case if you have selected the check box of the document in step 11, and click the **Properties** button on the **Inline Action Bar** of the document.

13. In the **Properties** list, select **Relations**.

    On the Relations page, you can see the document is attached to the change request.

14. Click **Go back** button to go to the **Properties** page.

15. Click **Go to overview** from the notification message that is displayed immediately after a change notice is created and click **Open**. Alternatively, you can navigate to **Operations** > **Change Request** > **Reason Code**.

16. Position the pointer over the newly created change request document and click **More actions** button on the **Inline Action Bar** and click **Send to workflow** > **Submit Change Request**.

17. To send the change request to workflow approval process, in the **Submit Change Request** dialog box, in the **General** area, type the notes in the **Note** box.

18. Click **Performers** area or click **Next**.

19. In the **Change Managers** list, select the required one or more change managers.

20. Click **Next** or click **Document** area.

21. In the **Documents** area, do one of the following:

    a. Click **Next**.

    b. Click **Schedule**.

22. Optional In the **Schedule** area, in the **Plan** area, choose the **Launch on** date, **Due** date, and if required select the **Send notification when the workflow starts** check box. In the **Follow-up** area, choose **Send notification if not ended by date**.

23. Click **Finish**.

    A notification message appears and the document status changes to **Submitted**.

When change request is sent in a workflow, the electronic signature details such as user, date with timestamp, and justification details added to the change request.

4.2 Create a change notice

You can use change notices for reviewing and approving document revisions.

Create a change notice:

1. Sign in with your project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Select **Operations**, click the **Add item** button, and then click **Add file**.
4. In the **Create Type** dialog box, in the **Category** list, select **Change Management**.
5. In the **AO Document Type** list, select **Change Notice**. The **Use source content details** and the **Properties** check box are selected by default.
6. Click **Continue**.
7. In the **Edit Properties** dialog box, specify the other relevant details to the change notice:
   a. In the **Title** box, type the title.
   b. Click **Classification** and in the **Reason Code** list, select the relevant reason code.
   c. In the **Topic** box, type the name of the topic and in the **Description** box, type the description.
   d. In the **Keywords** list, select the one or more keywords and click **Close** button  .
   e. Click **Process** Info and in the **Control Category** list, select the relevant control category.
   f. Select one or more required **Coordinators**, **Authors**, **Reviewers**, and **Approvers**.
   g. Click **Continue**.
8. In the **Select template** dialog box, select the check box of the relevant **AO Change Notice Template** and click **Continue**.
9. In the **Edit file** dialog box, click **Edit now** or **Edit later** or **Close** as per your requirement.

   You can view the new change notice created in the **Change Notice** folder.
10. Go to **Operations** > **Discipline** > **Fire & Gas** > **CAT1**.
11. Select the check box of the document that is in draft status, and then click **Attach to Change Notice**.

12. In **Attach CN Dialog** dialog box, in the **Select Change Notice** list, select the required change notice, and then click **OK**.
13. Clear the selected check box of the draft document.
14. Click **Go to overview** from the notification message that is displayed immediately after a change notice is created and click **Open**. Alternatively, you can navigate to **Operations** > **Change Notice** > **Reason Code**.
15. To send the change notice to review/ approval process, position the pointer over the newly created change notice document, click **More actions** button ***, and then click **Send to workflow** > **Submit for Review/Approval**.
16. In the **Submit for Review / Approval** dialog box, in the **General** area, type the notes in the **Note** check box.
17. Click **Next** or Click **Performers** area.
18. On the **Performers** area, select the required one or more **Document Reviewer**, **Document Approver**, and the **Document Coordinators**.
19. Click **Next** or click **Documents**.
20. Click **Next** or click **Schedule**.
21. Optional In the **Schedule** area, in the **Plan** area, choose the **Launch on** date, **Due** date, and if required select the **Send notification when the workflow starts** check box. In the **Follow-up** area, choose **Send notification if not ended by date**.
22. Click **Finish**.

    Notification message appears.

    When change notice is sent in a workflow, the electronic signature details such as user, date with timestamp, and justification details added to the change notice.

4.3 Review change requests

Change requests defines why the new documents require creation or if an existing documents require revision. The provided change request review and approval process requires the document coordinator review and selection of next activity along with approving the revisions made in response to an approved change request.

Complete a change request review process:

1. Navigate to the **Task** tile and select the newly created Change Request.
2. On the **Working files** tab, select the Change Request document.
3. In the **PDF Preview**, you can view the document with **Submitted** watermark status. In addition, you can use **Viewer** to view the document.

4. Click **Accept**.
5. In the **Tasks list** area, select the next tasks.
6. On the **Accept - Add electronic signature** dialog box, do the following:
    a. Type the required login and password credentials. For example, you can add ao_doc_coordinator for login and required password details.
    b. Select a required option for Intension. For example, you can select **Technical review**.
7. Click **Submit**.

Chapter 5

Working Copy, Project Working Copy and Working Copy Revision

5.1 Create working copy

Working copies are exact content copies of effective controlled documents for sharing to brown field projects. OpenText Documentum CM for Engineering maintains a relationship between a controlled document and working copies, which enables the parallel revision of content for later re-incorporation into the original.

Create a working copy for an effective document:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. In the **Searches** tile, click **Find Documents based on Asset Class**.
3. In the **Find Documents based on Asset Class** dialog box, do the following:
   a. Select the required facility.
   b. Select the **Effective** status for Document Status.
   c. Select the required option for Area, System, and Sub-System.
4. Click **Search**.
5. On the **Search Results for "Find Documents based on Asset Class"** page, you can view the available docs with Effective status.
6. Select one of the Effective document and click **Add item** button +, and then click **Add file**.
7. In the **Create type** dialog box, select **Working Copy** for Category.
8. Select **Project Working Copy - An operations document copy shared to project managed in Asset Operations** option for AO Document type.

   You can view the default option selected for **Use source content** and **As blueprint for**.
9. Click **Continue**.
10. In the **Edit Properties** dialog box, select **Internal** or **External** option for Source.
11. In the **Classifications > Project Working Copy** area, select **Due Date**, **Project Title**, and **Project Number** options. You can notice that the Asset details are included by default based on the document selected.
12. Click **Continue**. The template creates a working copy and saves to the working copy folder.

13. To view the document properties, point to the working copy, click the **More actions** button ••• on the **Inline Action Bar**, then select **Properties**.
14. In the **Properties** area, select **Relations** option, and click the working copy document to view the Working copy location.

    The source document number of the working copy is same as the controlled document number of the Asset Document.

5.2 Create working copy in bulk

You can create working copies of the asset document in bulk and create relation with a defined project package.

Create working copy in bulk:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. In the **Searches** tile, click **Find Documents based on Asset Class**.
3. In the **Find Documents based on Asset Class** dialog box, perform the following:
   a. Select the required facility.
   b. Select the **Effective** status for Document Status.
4. Click **Search**.
5. In the Document list, you can view all available **Effective** document status.
6. Select all the required effective documents.
7. Click **Create Working Copies** in the header.
8. On **Bulk Create Working Copy** dialog box, select the required project package.
9. Click **OK**.

5.3 Create working copy revisions

Document Controller can create a working copy revisions for sharing with contracted supplier. The working copy revisions supports review and approval within the OpenText Documentum CM for Engineering repository.

Create working copy revisions:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Click the **Document list** tile.
3. Navigate to the required **Operations > Facility > CAT** folder and select a document that is in **Effective** status that require revision.

4. Click the **Add item** button +, and then click **Add file** to create a working copy revision.
5. In the **Create type** dialog box, in the **Category** list, select **Working Copy**.
6. In the **AO Document Type** list, select **Working Copy Revision – A pre-approved operation...**.

   The options for **Use source content** and **As blueprint for** are selected by default.
7. Click **Continue**.
8. In the **Edit Properties** dialog box, type the name for the Document working copy revision properties.
9. In **Revision**, you can view that the revision starts with a letter a.
10. Select **PO Number**.
11. Choose the required planned date.
12. In the **Classifications** area, select all mandatory property values.
13. Click **Continue**.

    You can view the new Working Copy Revision file created in the selected project folder location.

5.4 Cancel the working copy revision

The current state of the working copy revision is in Reviewed state. The working copy revision is attached to a Supplier Document Schedule and the current state of the Supplier Document Schedule (deliverable) in OpenText Core Collaboration for Engineering is **Draft**.

To cancel the working copy revision:

1. Position the pointer over the working copy revision and click the **More actions** button *** on the **Inline Action Bar** and click **Cancel document**.
2. In the **Change state** dialog box, click **OK**.
3. The status of the Working Copy Revisions changes to **cancelled** and in OpenText Core Collaboration for Engineering the status of the deliverable changes to **Open**.
4. In OpenText Core Collaboration for Engineering, click the open package and then click **SUBMIT**.

Note: In OpenText Core Collaboration for Engineering, if you resubmit a document for a Supplier Document Schedule that is in the cancelled state in OpenText Documentum CM for Engineering, the deliverable moves to the rejected state.

5.5 Create bulk working copy revision

If there are more number of effective documents in the Operations folder, you can select all the effective documents and create a working copy revision.

Create bulk working copy revision:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Click the **Operations** tile.
3. Navigate to a folder that contains more than one effective document and select all the effective documents.
4. Position the pointer over the new effective document and click the **More actions** button ••• on the **Inline Action Bar** and click **Create Working Copy Revisions**.
5. In the **Bulk Create Working Copy Revision** dialog box, type revision number.
6. Select the **PO Number**.
7. Select a required **Planned Date**.
8. Select **Project Title** and **Supplier Name** details.
9. Click **Continue**.
10. Navigate to the **Relations** page to view the working copy relation created for these documents.

5.6 Create a project working copy

Project Controller can create a project working copy of an as-built document and have it automatically filed to the active project.

The following are the prerequisites for creating a project working copy:

- Must select an asset document that is in effective status.
- The folder must contain an Asset document that is of the CAT1 or CAT2 or CAT3.
- Must select a project that is in Active status.

Create a project working copy:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. In AO folder, select a CAT1 or CAT2 or CAT3 document that is in the effective status.
3. Click **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Working Copy**.

5. In the **AO Document Type** list, select **Project Working Copy- An operations document copy shared to project managed in Asset Operations**.
6. Click **Continue**.

   The object is auto named by default.
7. In the **Title** box, type the required title for the project working copy document.
8. In the **Source** list, select **Internal** or **External**.

   Note: You can select **External** option for sending the working copy document to a transmittal. 'Can be in a Transmittal' option is selected by default.

   In **Classifications** area, you can view the Project Working Copy properties with the inherited operational document properties.
9. In the **PO Number** list, select the required **PO Number**.
10. In the **Issue Reason** list, select the required **Issue Reason**.
11. Choose the required planned date.
12. In the **Classifications** area, do the following:
    a. In the **Project Title** list, select the required project title.
    b. In the **Project Number** list, select the required project number.

       Project title is retrieved based on the facility you have selected. Only active projects is displayed. Project number is automatically retrieved based on the project title selected.
13. Click **Continue**.

    You can view the Project Working Copy document. A new Project Working Copy document that is related to the source document with minor project configurations applied gets created in the selected projects cabinet.

5.7 Update a project working copy

Project Controller can update the content of an existing project working copy with the effective version of the operations document.

Note: OpenText Documentum CM for Engineering versions the project working copy with the content of its related effective operations document.

The following steps are the prerequisites for updating a project working copy:

- Project working copy and Asset document must not be checked out.
- Asset document must of CAT1 or CAT2 or CAT3.
- Project working copy must be in Placeholder or Draft state.

Updating a project working copy:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Active Projects** list tile.
3. Navigate to working copy folder.
4. Select the Project Working Copy that is in **Placeholder** or **Draft** state.
5. Position the pointer over the project working copy and click **More actions** button *** on the **Inline Action Bar** and click **Retrieve Effective Version**.
6. In the **Retrieve Effective Version** dialog box, select **OK**.
7. Navigate to the **Versions** area to view the updated version label.

5.8 Create bulk project working copy

If there are more number of effective documents in the Operations folder, then you can select all the effective documents and create a project working copy.

Note: You can refer to "Create working copy in bulk" on page 52 for creating working copies in bulk.

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Click the **Operations** list tile.
3. Navigate to a folder that contains more than one effective document and select all the effective documents.
4. Click **More actions** button *** on the **Inline Action Bar** and click **Create Project Working Copies**.
5. In the **Bulk Create Project Working Copy** dialog box, select one of the available Active Projects.
6. Select Source as **External** or **Internal**.
7. If you select External, select the required PO Number, Planned Date, and Issue Reason.
8. Click **OK**.
9. In the **Properties** area, select **Relations** to view the working copy relation created for these documents.

Chapter 6

Enterprise asset management

An equipment is an individual object that is to be maintained independently. Using SAP, you can create multiple equipments and integrate the same with xECM to work with multiple applications.

Preventive maintenance should maintain the high availability of technical systems. To achieve this, plant operator can create multiple tasks lists and connect the documents with equipments by using SAP Plant Maintenance.

Extended ECM provides a document workspaces for each technical object in SAP Plant Maintenance.

For example, Plant Operator creates a maintenance order to plan the monthly maintenance of pump P-3000-N001 that is based on material P-3000. The user references a general task list that contains monthly operations of the material P-3000.

Based on a existing template Extended ECM automatically creates a Workspace for the maintenance order including operations workspaces. All documentation of the task list workspace are automatically stored in the maintenance order workspace.

6.1 Create or view an equipment workspace

In SAP application, you can create, or view an existing equipment workspace.

Create or view an equipment workspace:

1. Sign in to SAP application with required credentials.
2. In Equipment, type the required equipment number or search for the required equipment.

   Validate the existing equipment details.
3. In **Services for Objects**, select **OpenText Business Content**.

6.2 Create a equipment business workspace

In SAP application, you can create an equipment workspace.

Create a equipment business workspace:

1. After you select **OpenText Business Content**, xECM application opens with the selected equipment metadata.
2. If equipment business workspace does not exist in xECM, you must create a new business workspace.
3. In **General** tab, click **Create**.
4. The Business workspace for an equipment gets created in OpenText Documentum CM for Engineering repository.

   You can view the read only content of the workspace in the xECM application. Also, you can click + to create a new document with author role user.

6.3 View a equipment business workspace

You can view an existing equipment workspace.

View a equipment business workspace:

1. Sign in with author credentials.
2. Navigate to **Operations > Enterprise Asset Management > Equipment** folder to view the newly created equipment business workspace.
3. In the newly created workspace, you can view Manuals, Technical Drawing, and Warranties related folders.

6.4 Add a asset document to equipment business workspace

You can add a asset document to equipment business workspace.

Add a asset document to equipment business workspace:

1. Sign in with author credentials. For example, **ao_author**
2. Navigate to the newly created **Operations > Enterprise Asset Management > Equipment** business workspace.
3. Click **+** to add a new asset document.
4. Select all the mandatory parameters for asset document creation.

   For more information about creating a new asset document, see *OpenText Documentum Content Management for Engineering - User Guide (EEGAM-UGD)*

5. In **SAP Properties** tab, select the required business object type, name, and classification details.
6. The new asset document is added to the equipment workspace.
7. In Relations widget, you can view the asset document relation details.

   The relation is created for Facility, Discipline, and Equipment business workspace.

Chapter 7

Viewer

If your system has an appropriate document viewer installed, you will see a preview of the selected document in the **Viewer** panel. If your system does not have a document viewer installed, the **Viewer** panel will remain blank, but you will still see the document properties in the **Properties** panel.

OpenText Documentum CM for Engineering supports Brava! Enterprise Viewer. If your administrator has configured the Brava! Enterprise Viewer, you can open the content in the viewer.

Notes

- The document preview feature is supported by the following document viewer. For information about how to use the viewer, see the documentation for each viewer:
  - OpenText™ Brava!™

    See *OpenText Brava! Enterprise - Administration Guide (CLBRVW-ABE)*.
- If your system does not have a viewer configured, the document preview will not be available, but you can still open or download the document to review, edit, and evaluate. And you can still view the document properties in the **Properties** panel.

Brava! Enterprise Viewer: The viewer service provides the ability to open a variety of document formats in a common viewing application. The basic viewer interface offers various view adjustment tools, search tools, file printing, publishing, and downloading tools.

You can adjust the viewer display and how the image displays within the viewer using the following view control buttons:

Table 7-1: Viewer controls

Icon	Description
 Toggle panel	Opens or closes the viewer right or left side panel.
 Zoom out	Incrementally decreases magnification of the document.
 Zoom in	Incrementally increases magnification of the document.

Icon	Description
 Fit extents	Fits the entire document in the viewing window.
 Fit width	Fits the width of the document in the viewing window.
 Rotate	Incrementally rotates the document in 90-degree, counter-clockwise turns.
 Page	Displays the current page of the document/ total number of pages. You can input a page number and use **ENTER** to navigate to a specific page.
 Close	Closes the viewer.

Chapter 8

Registration form

Asset Registration Forms are reusable document metadata templates that are used to predefine metadata for specific assets, disciplines, organizational functions, processes, or projects. Only Manager can create or edit registration forms.

8.1 Create a registration form

1. Sign in with Manager credentials. For example, **ao_manager**.
2. Click the **Operations** tile.
3. Select **Operations**, click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Asset Registration Form**.
5. For **AO Management Artifacts**, select **AO Document Registration Form**. Here, you can select Control Procedure Registration Form or Document Type Registration Form.
6. Click **Continue**.
7. In the **Properties** screen, type the required name and title.
8. If you want to Auto Inherit to the Document creation, provide the type. For example, select the License Type, License Name, and License Number.
9. Click **Continue**.
10. Position the pointer over the new Asset registration form and click the **More actions** button ••• on the **Inline Action Bar** and click select **Lifecycle** > **Mark Registration Form as Effective**.

8.2 Create auto inherit configuration rule

Create auto inherit configuration rule:

1. Log in with Administrator credentials. For example, **ao_admin**.
2. Navigate to the **Operations** folder
3. Select **Operations**, click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, select **Administration Artifacts** as the creation profile.
5. Select **Auto Inherit Configuration** for AO Admin Artifacts.

6. For Source Content, you can select the required folder.
7. Click **Continue**.
8. In the **Edit Properties** dialog box, click **Inheritance Rule.**
9. Type the auto inheritance rule name.
10. In **Inheritance Configuration**, it is mandatory for you to select the **Automatic** and **Enabled** options.

Name	Details
Automatic	Select this option if this inheritance rule is an **automatic** rule to apply by default.
Enabled	Set this value to true if this inheritance configuration is active. Set to False if it is inactive. Inactive rules are ignored, even if they are specified explicitly in the `auto_inherit_config` method argument.
Precedence	Specifies the order in which *`automatic`* rules must be applied. Whenever multiple rules apply to the same context object, they are ordered by increasing precedence value first, then by rule name (alphabetical order). Type the required number for precedence.

11. For Object Types, ao_document is selected by default. You can select more than one object type.
12. For Condition, type the required Optional DQL Qualifier.
13. For Source Query, you can provide the query that OpenText Documentum CM for Engineering must use to retrieve the registration form for which the auto inherit rule must be applied.

    Specifies the source object(s) from which the attribute values will be copied.

    For example, `<RegFrom object Type> where <condition>`
14. Provide the attribute names. For example, **default target attribute = source attribute**

    If source and target attribute are same, you can add **default common_attr_name**.

    For example:

```
default ao_license_name_s

default ao_license_number_s

default ao_license_type_s
```

15. In the **Title** box, type the required title.
16. Select the required keyword.
17. Click **Continue**.
18. Select **Edit now** or **Edit later** option.

19. Click **Close**.

8.3 Create an auto inherit document

1. Sign in with author credentials. For example, **ao_author**.
2. Navigate to the **Operations** folder.
3. Select **Operations**, click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, select **Asset Document** as the creation profile.
5. Select CAT3 Controlled Document for **AO document type**.
6. In the **Properties** area, provide all the required details.
7. Click **Continue**.

   When the CAT3 document is created, the attribute configured details are automatically updated based on the auto inherit configuration rule that was defined.

Chapter 9

Workflows

9.1 Withdraw a document

You can retire documents in the Effective state by withdrawing them. All versions are withdrawn together. You can retain withdrawn documents as historical records. For Category 1, 2, and 3 documents, you must be a Coordinator to perform this task.

1. Click the **Document list** tile.
2. In a doclist, navigate to the document you want to withdraw, then position your pointer over a document and click the **More actions** button *** on the **Inline Action Bar**, then select **Withdraw the document**.
3. Click **OK**.

9.2 Self-approve a document

Authors can self-approve Control Category 3 documents.

Self-approve a document:

1. Click the **Document list** tile.
2. In a doclist, navigate to the document you want to withdraw, then position your pointer over a document and click the **More actions** button *** on the **Inline Action Bar**, then select **Lifecycle > Self-approve and make 'Effective'**.
3. In the **Self- approve document** dialog box, select the user who will have permission to read this document when it is in the **Effective** state.
4. Click **Submit**.

9.3 Change the document status to effective

OpenText Documentum CM for Engineering enables document controllers to self-approve and change the Category 3 documents to Effective state.

Change the document status to effective:

1. Browse to the required folder.
2. Position the pointer over the document and click **More actions** button *** on the **Inline Action Bar**, then select **Effective**.

3. In the **Change state** dialog box, you can validate the existing effective from date and recipient details.

9.4 Update the document status to release pending

1. Sign in with approver credentials. For example, **ao_qo_approver**
2. In the **Tasks** list, select the task based on document category.
3. In the **Attachments** area, select the document. On the **PDF Preview** tab, you can view the document with the **Release Pending** watermark. In addition, you can view the reviewed details of the approver credentials.
4. In the **Task list** tile, click the **More actions** button *** and select **Accept task**.
5. In the **Forwarding task** dialog box, select the **Sends document to To Be Read users via TBR workflow** option.
6. Click **Next**.
7. In the **Forwarding Task Properties > Set document effectivity period** dialog box, select the **Make Effective automatically** option.
8. Select **Effective from date** and **To expiry date**.
9. On the **Set recipients and readers** tab, select the required TBR Distribution List.
10. Click **OK**.

9.5 Update the document status to effective

1. Sign in with the approver credentials. For example, **ao_approver**
2. Navigate to the **Tasks** tile.
3. In the **Tasks** list, select the task based on document category.
4. In the **Attachments** area, select the document. On the **PDF Preview** tab, you can view the document with **Release Pending** watermark. In addition, you can view the reviewed details of approver credentials.
5. In the **Task list** tile, click the **More actions** button *** and select **Accept task**.
6. In the **Forwarding task** dialog box, select **Sends document To Be Read users via TBR workflow** option.
7. Click **OK**.
8. In the **Forwarding Task Properties > Set document effectivity period** dialog box, select the **Make Effective automatically** option.
9. Select **Effective from date** and **To expiry date**.
10. In the **Set recipients and readers** tab, select the required TBR Distribution List.

11. Click **OK**.

9.6 Add a document to a workflow

When you add a document to a workflow, OpenText Documentum CM for Engineering provides workflow options based on the control category, the lifecycle state, and the type of document.

Add a document to a workflow:

1. Right-click a document and select (workflow name).

   Note: The document type determines the workflows that can be applied to the document.

2. In the **Planning / Sending of Workflow** dialog box:

   - On the **Recipients** tab, verify the participant group fields. Modify the recipients as needed.
   - On the **Notifications** tab, type information about the document. The participants of the workflow review these **Workflow notes** as the document completes task processing.
   - On the **Attachments** tab, add additional content required for processing workflow tasks.
   - On the **Planning and Follow-up** tab, select a date for planning and following up on the task in the workflow.

3. Click **Send** to send the document to the specified user in the workflow.

9.7 View workflow progress

Authors can monitor the progress of document workflow tasks.

View workflow progress:

1. Select a document in the **Document list** and click **Workflow overview**.
2. Expand the workflow to view the workflow tasks. Active workflows and tasks are shown in the Running state.

9.8 Execute tasks in a workflow

As documents progress through a workflow, users are assigned tasks based on their role. For example, Reviewers perform reviewing tasks and Approvers perform approving tasks. OpenText Documentum CM for Engineering provides defined groups for each role.

The following are the standard workflow actions for processing tasks:

- *Acquire Task*: Confirms that the user has read and received the task.
- *Accept Task*: Confirms that the task has been completed and the quality of the document accepted. Depending on the type of workflow that is run, this label might vary.
- *Reject Task*: Confirms that the task is completed and the quality of the document was not acceptable. Depending on the type of workflow that is run, this label might vary.

Versions

Whenever a document is created the document version label is represented as 0.1.

When the document status changes to Effective/Completed, the version number changes to 1.0.

9.9 Send content to a workflow

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. In a doclist, navigate to the content you want to send to a workflow, then position your pointer over a document and click the **More actions** button *** on the **Inline Action Bar**, then select **Send to workflow** > **Submit Asset document for formal review**.

   If you need to select multiple documents, click the check boxes next to the documents and select **Send to workflow** > **Submit Asset document for formal review** from the toolbar menu.

   OpenText Documentum CM for Engineering evaluates the documents to ensure that they are permitted to be sent to the workflow. A message appears listing the items that are incompatible and therefore excluded. The documents that are accepted become the workflow's working documents.
3. Update each field in the panels marked with an asterisk, which might include General workflow notes, the selection of Performers (the members of your organization who take part in processing the tasks in the workflow), Documents or the Schedule for the workflow.

   Click **Next** to move to the next panel.
4. In **Documents** area, add supporting files if allowed in your workflow. Supporting Files are pieces of content that are associated with the primary

Working Files that help task participants process the workflow (for example, scanned receipt .jpgs or authorization emails).

5. In the Schedule area, enter the **Launch on**, **Due**, and **Follow-up** dates as well as choose if notifications must be sent to performers when the workflow starts, if required.

6. Click **Finish** when you have completed all the required panels. A message appears indicating the status of the workflow and the tasks are sent to Performers.

9.10 Perform actions on workflows

1. Sign in with reviewer credentials to view the assigned tasks. For example, **ao_reviewer**

   Your assigned tasks appear in the Tasks list (or equivalent custom name) tile on the Landing page. The tasks are sorted in the descending order by Sent Date, so the most recent task appears on the top of the list. Unread tasks appear in bold type.

2. When you click a task in a list, the Task detail view opens where you can perform actions on that task, view its properties, and refer to working and supporting files.

3. Click **Accept** or **Reject**.

9.11 PVA abort workflow

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**

2. Navigate to a folder and select an internal document.

3. Click the **More actions** button *** on the **Inline Action Bar**, then select **Send to workflow** > **Prepare Verify Approve**.

4. In the **Prepare Verify Approve** dialog box, in the **General** section, provide the workflow name.

5. In the **Performers** section, select **Preparers**, **Verifiers**, and **Approvers** from the list.

6. In the **Documents** section, add working files and supporting files.

7. In the **Schedule** section, select required **Plan** and **Follow-up** dates.

8. Click **Finish**.

   The document status changes to **Being Prepared**. For Verify Approve, the document status changes to **Req Verification**.

9.12 Send the external document to review workflow

1. Sign in with credentials. For example, **ao_doc_coordinator**
2. Navigate to a folder and select an external document.
3. Click the **More actions** button ••• on the **Inline Action Bar**, then select **Send to workflow** > **Review External Documents**.
4. In the **Review External Documents** dialog box, in the **General** section, provide the workflow name.
5. In the **Performers** section, select **Reviewers**, **Lead Reviewer**, and **Review Approvers** from the list.
6. In the **Documents** section, add working files and supporting files.
7. In the **Schedule** section, select required **Plan** and **Follow-up** dates.
8. Click **Finish**.

   The external document status changes to **For Review**.

Chapter 10

Transmittals

10.1 Attach reviewed documents to a project transmittal

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Navigate to **Operations** > **Facility** > **Area** .
4. Select the check box of the document that is in **Reviewed**status.
5. Click **Attach to Transmittal**.
6. In the **Attach Transmittal Dialog** dialog box, select the transmittal for which you want to send the document and the type of association.
7. Click **OK**.

10.2 Create a project transmittal from a template

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Select **Operations** and click **Add item** button + and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Transmittal Templates**.

   Transmittal Category is selected to **General Transmittal** and **Properties** check box is selected by default.
5. In the **Edit Properties** dialog box, specify the other relevant details:
   a. In the **Summary** box, type the summary.
   b. Click **Transmittal Info** and in the **Issued for Reason** list, select the reason for issue.
   c. In the **From** list, select the area and in the **To** list, select the area.
   d. Turn on the **Required Acknowledgement?** switch if required.
   e. In the **Notes/Instruction** box, type the notes or instructions and click **Close** button <.
   f. Click **Asset Info** and in the **Assets** area, select **Facility**, **Area**, **System** and **Sub-System**.

g. In the **Licenses** area, select the **License Type**, **License Name**, and the **License Number**.

h. In the **Projects** area, select the **Programs**, **Sub-Program**, **Project Name**, **Project Number**, and the **Job Number**.

i. Click **Close** button  .

j. Click **Access Control** and in the **From Managers** list, select the managers and in the **From Users** list, select the users.

k. Click **Controllers** and select the required one or more **Document Controllers**.

Consumers and Auditors are selected by default.

l. Click **Continue**.

New Transmittal Template is created in Transmittal Templates.

10.3 Create a project transmittal

1. Sign in with project controller credentials. For example, **ao_tr_manager**.
2. Click the **Document list** tile.
3. Click the **Add item** button  , and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Transmittal**.

   In the **Transmittal Category** list, **General Transmittal** is selected by default.

5. Optional In the **Use source content** field, click **Browse** button  and in the **Select** dialog box, select the check box of the required folder, and then click **Add**.
6. Click **Continue**.
7. In the **Edit Properties** dialog box, specify the other relevant details:

   a. In the **Summary** box, type the summary.

   b. Click **Transmittal Info**, in the **Issued for Reason** list, select the reason.

   c. In the **From** list, select the folder/facility details and in the **To** list select the folder/facility details.

   d. In the **Transmittal Output Format** list, select the output format of the document.

   e. In the **Notes/Instructions** box, type the notes or instructions, if required.

   f. Turn on **Requires Acknowledgement** switch if you want the acknowledgements.

   g. Choose the **Response Due Date**, if required.

   h. In the **Supplier Document Schedule** area, in the **PO Number** list, select PO number and in the **Supplier Exchange Name** list, select the name of the OpenText Core Collaboration for Engineering.

i. Click **Asset Info**, in the **Asset** area, select the required **Facility**, **Area**, **System**, and **Sub-system** details.

j. In the **License** area, select the required **License Type**, **License Name**, and the **License Number** details.

k. In the **Project** area, select the required **Programs**, **Sub-Program**, **Project Name**, **Project Number**, and **Job Number**.

l. Click **Access Control** area, click **Controllers**, select one or more required **Document Controllers**.

m. Click **Continue**.

Transmittal is created.

8. Click **Go to overview** from the notification message that is displayed immediately after a general transmittal is created and click **Open**.

9. To generate a coversheet, position the pointer over the newly created transmittal document and click **More actions** button *** on the **Inline Action Bar** and click **Lifecycle** > **Generate Coversheet**.

10. In the **Generate Coversheet** dialog box, click **Continue**.

10.4 Add documents to a project transmittal

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**

2. Navigate to any one of the project containing external project documents or working copies.

3. Select the required documents that are in **Placeholder** status.

4. Click the **More actions** button *** on the **Inline Action Bar**, then select **Attach to Project Transmittal**.

5. In the **Attach Project Transmittal Dialog**, select the required transmittal and type of association. For type of association, you can select Transmittal Document.

6. Click **OK**.

7. The selected project documents are displayed as transmittal documents in the relations tab of the selected transmittal.

Note: The project controller can relate multiple, project documents to a Project Transmittal or Transmittal template that is in Being prepared status.

10.5 Send a project transmittal

1. Sign in with project controller credentials or as a document controller of the transmittal. For example, **ao_doc_coordinator**
2. Navigate to Projects folder to send the transmittal that is in **Being Prepared** state.
3. Click the **More actions** button ••• on the **Inline Action Bar**, then select **Lifecycle > Send**.

   Note: You must ensure that the transmittal contains the following:

   - External Project document or a external working copy added to the transmittal
   - Transmittal is associated with a coversheet
   - Coversheet is generated
   - Distribution list details are added to the transmittal
4. In the confirmation dialog box, click **Yes** to send the transmittal.
5. The transmittal is sent to the recipients as per the delivery mechanism selected in the distribution list.

The transmittal creates a zip package containing the following documents. This zip package is available as a transmittal rendition.

- Attached documents - During transmittal preparation, if **Include Document Content** check box is selected, then the source documents will be part of transmittal package.
- Reference documents - If PDF renditions of reference documents are available, the PDFs is added to the transmittal. Else, the source reference documents will be added.
- PDF rendition of transmittal coversheet
- Comment Summary zip package. This package contains annotated PDF documents (burned in comments and markups made as part of the review process) and comment summary documents of each transmittal document. These documents are organized by their source document numbers.

Note: If you want to send the document that has consolidated comments to OpenText Core Collaboration for Engineering with the help of project transmittal, the environment must have Advanced Document Transformation Services (ADTS) installed.

10.6 Send general transmittal to OpenText Core Collaboration for Engineering

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**

   Note: To create a transmittal, you must add **ao_doc_coordinator** to **ao_tr_controllers** role.

2. Click the **Document list** tile.

3. Select **Active Projects > <Folder1>> <Folder2>**, click **Add item** button +, and then click **Add file**.

4. In the **Create type** dialog box, in the **Transmittal Category** list, select **Project Transmittal**.

5. Click **Continue**.

6. In the **Transmittal Info** area, select the required option for **Issued for Reason**, **From**, and **To**.

7. For Supplier Document Schedule, select the **PO number**. The OpenText Core Collaboration for Engineering site displays a default name based on the selected PO number.

   Note: Equivalent of OpenText Documentum CM for Engineering project number is Project code in OpenText Core Collaboration for Engineering and equivalent of OpenText Documentum CM for Engineering project title is name of the project in OpenText Core Collaboration for Engineering.

   Supplier Document Schedule is created in OpenText Core Collaboration for Engineering with Project title and project number combination.
   Whenever you send two different transmittals from two OpenText Documentum CM for Engineering projects that contains the same project number but has different project title, then OpenText Documentum CM for Engineering Connector verifies the title and number combination and then creates the OpenText Core Collaboration for Engineering projects accordingly.
   If a transmittal is sent from any of the existing OpenText Documentum CM for Engineering projects, then the transmittal is attached to the correct project number-project title combination in OpenText Core Collaboration for Engineering.

8. Click **Continue**.

9. In the **Edit file** dialog box, click **Edit now** or **Edit later**.

10. Click **Close**.

11. Navigate to the new transmittal.

12. Click the **More actions** button ••• on the **Inline Action Bar**, then select **Prepare Distribution List**.

13. In the **Prepare Distribution List** dialog box, select **External** for Type.
14. Select the required **Company**, **Group**, **Name**, and **Email** details.
15. Click **Submit**.
16. Click the **More actions** button ••• on the **Inline Action Bar**, then select **Lifecycle > Send**.

    The general transmittal is sent to the OpenText Core Collaboration for Engineering and the status changes to Queued.

Chapter 11

Projects

11.1 Create a new project

You can create Active Projects to perform project-related tasks. You can create a new project using the active projects creation profile, which is configured by the administrator. You must specify information such as project facility, project title, project number, project status, project members, milestones, and other settings for project supplier and operations.

After you finish providing the details to create a project, the application creates a folder hierarchy organized by the facility folder. A facility contains one or more projects.

To create a new project:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Active Projects** tile.
3. On the **Active Projects** page where Facilities are listed, click the **Add item** button + and then click **Project**.
4. Click **Continue** in the **Create type** dialog box.
5. In the **Edit Properties** dialog box, the Project Creation Template is selected by default. You can specify the other relevant details to set the properties of the project:
    a. In the **Title** box, type the title of the project.
    b. In the **Project** area, select the required option for Facility, Project Title, Project Number, and Project Type.
    c. In the **Project Dates and Status** area, choose the required Start Date, Target End Date, and Closure Date.
    d. In the **Project Members** area, select all the required Project Controllers and other project members.
    e. In the **Operations** area, select an Asset if required and select the relevant Area and System details.
    f. In the **Project Turnaround** area, specify the Default Days for Project Response, Default Days for External Response, and Default Days for Review and Comment.
6. Click **Continue**.

A new project with the status set to Planning is created in the new project folder under the relevant facility. The default folder structure is:`/Active Projects/Facility/Project Number-Project Name/`. The project configuration is auto-named as *Project Number-Project Name* Project.

You can position the pointer over the item and click the **Properties** button  to view the Project Configuration.

11.1.1 View relationships between projects

1. Click **Go to overview** from the notification message that appears immediately after a project is created and click **Properties**. Alternatively, you can navigate to: `Active Projects/Facility/Project Number-Project Name`, select the project check box.

2. Click the **Properties** button  , and then select **Relations** from the **Properties** list.

The predefined relations for the new project are listed in the Relations area.

11.1.2 Set the project status to Active

You must first set the project document state and then change the status of the project to Active.

To set the project status to Active:

1. Position the pointer over the item and click the **More actions** button *** on the **Inline Action Bar**.
2. Click **Lifecycle** > **Set Project Document States**.
3. Click **Submit**.
4. Position the pointer over the item and click the **More actions** button *** on the **Inline Action Bar**, select **Lifecycle** > **Make 'Active'**.
5. In the **Make 'Active'** notification box, click **Continue**.

11.2 Create a Project Package

Project packages are packages of one or more working copy documents that can be sent to external parties.

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Select **Operations**, click the **Add item** button +, and then click **Add file**.
4. In the **Create Type** dialog box, in the **Category** list, select **Project Package**.

   The **AO to CP Artifacts** and **Use source content** details and the **Properties** check box are selected by default.
5. Click **Continue**.
6. In the **Edit Properties** dialog box, specify the other relevant details:
   a. In the **Title** box, type the title.
   b. Select the relevant **Project Number** and the **Project Name** details.
   c. In the **Equipment** area, select the required **Major Function**, **Function (Tag)**, **Equipment Tags** details and in the **Type (Tag)** box, type the type of the tag.
   d. In the **Drawing** area, in the **Drawing Number** box, type the drawing number and in the **Sheet Number** box, type the sheet number.
   e. Click **Assets**, in the **Assets** area, select the required **Facility**, **Area**, **System**, and **Sub-System** details.
   f. In the **License** area, select the required **Type**, **Number** and **Name**.
   g. Click **Program Info** and in the **Program and Project** area, select the required **Programs**, **Sub-Program**, and **Job Number**.
   h. Click **Process Info** and select the required one or more **Coordinators**, **Authors**, **Reviewers**, and **Approvers**.
   i. Click **Continue**.
7. In the **Select template** dialog box, select the relevant template.
8. Click **Continue**.

   The project is created in project package.
9. Navigate to the **Operations** > **Projects** > **Project Number** > **Working Copy** folder.
10. Select the working copy documents that are in the **Being Prepared** state. Verify all the working copy documents that must be added to the project package. When in the Working Copy folder, you can select the Working Copy documents and view the source on the **Relations** tab.
11. Click **Attach to Project Package**.

12. In the **Attach Project Package Dialog** dialog box, in the **Project Document Package** list, select the new project package.
13. Click **OK**.
14. Position the pointer over the new project package and click the **Properties** button  on the **Inline Action Bar**.
15. In the **Properties** list, select **Relations**.
16. On the **Relations** area, verify the new working copy document added to the existing project package.

11.3 View or update project members

A project controller can update the project member details when the project is in the In Planning or Active state.

To view or update the project members:

1. Sign in with a user who belongs to the project controller role in the project.
2. Click the **Active Projects** tile.
3. Select the project folder. For example: `/Active Projects/Facility/Project Number-Project Name`
4. Select the required project configuration.
5. Select **Lifecycle > Membership**.
6. In the **Membership** panel, use the respective project role arrow to add or remove the project members.

   Note: When updating the membership details in Active Projects, you must make sure that all the checked out documents are either checked in or the checkout must be cancelled using the cancel-checkout option.

7. Click **Submit**.

11.4 Create a Project from existing configuration

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Click the **Active Projects** tile.
3. Select an existing project configuration in the projects folder.
4. Click the **Add item** button + and then click **Add file**.
5. In the **Create type** dialog box, in the **Category** list, select **Minor Project**.
6. In the **Create New** dialog box, select **Project**.
7. Click **Continue**.
8. In the **Edit Properties** dialog box, specify the other relevant details:
    a. In the **Project Configuration** area, type the required title.
    b. Select the required project creation template.
    c. In the **Project** area, select the required values for Facility, Project Title, Project Number, and Project Type.
    d. In the **Project Configuration** area, select the required values for status, start date, end date, and closure date.
    e. In the **Project Members** area, select the required users for project controllers, project owners, project authors, project readers, and project notifiers.
    f. In the **Operations** area, select the required asset, area, and system.
    g. In the **Project Turnaround** area, type the default days for project response, external response, and review and comment.
9. Click **Continue**.

11.5 Import a project folder hierarchy template

You can import a standard folder hierarchy that contains a common folder structure. By using this you can pre-create a project subfolder hierarchy before the project is made Active.

To import a project folder hierarchy template:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Select the Project Folder of a project that is in the **Planning** state.
3. Click the **Add item** button + and then click **Upload folder**.
4. In the **Select Folder to Upload** dialog box, select the folders that you want to import to the project.
5. Click **Upload**.

6. In the **Create type** dialog box, you can select the required folder.
7. For Structure, select **Minor Project Folders**.
8. Select the required values for Category and Minor Project Setup.
9. Click **Next**.
10. In the **Edit Properties for folder** panel, select the required values.
11. Click **Next**.

11.6 Enable the project to Active status

You can enable the project to active status. By changing the project to active state enable authors to create project content.

To enable the project to active status, follow these steps:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Click the **Active Projects** tile.
3. Navigate to a project configuration that is in **Planning** state.
4. Position the pointer over the project configuration and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Set Project Document States**.
5. In the **Set Project Document States** panel, select the required Project Document Target State and Working Copy Target State.
6. Click **Submit**.
7. Position the pointer over the project configuration and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Make Active**.
8. In the **Make Active** dialog box, click **Continue**.
9. Click **Continue**.

11.7 Prepare, verify, and approve an internal project document

Project controller creates a new project document, project working copy document, or revisions of the latest project document. The Project Controller routes to selected project members for preparation, verification, and approval. In all scenarios, the routed document package(s) are in the Draft state and specified as internally revised.

To send a document for PVA process:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Navigate to the Active Projects folder and select a working copy document or project documents.
3. Position the pointer over the working copy document or a project document that is in the **draft** state and click the **More actions** button ••• on the **Inline Action Bar** and then click **Send to workflow** > **Prepare Verify Approve**.
4. In the **Prepare Verify Approve** panel, add the required Preparers, Verifiers, and Approvers.
5. Click **Next**.
6. Select the required dates for plan and follow-up.
7. Click **Finish**.

   The status of the working copy or Asset document changes to Being Prepared.

Prepare documents task

1. Sign in with document preparers credentials.
2. Click **Tasks**.

   You can view all available tasks that are pending for your review.
3. In the **Tasks** tile, select **Prepare Project Documents**.
4. Click the attachment to view the document in the viewer.
5. On the **Notes** tab, add comments as required

   You can checkout and edit the document.
6. Click **Accept**.

   If the Preparer rejects the task, the project working copy document moves to the **Draft** state.
7. In the **Accept - Edit task properties** panel, add the required comments.

8. Click **Submit**.

   The task moves for verification.

Verify the document

1. Sign in with document verifier credentials.
2. Click **Tasks** tile.

   You can view all available tasks that are pending for your verification.
3. Click the attachment to view the document in the viewer.
4. On the **Notes** tab, add comments as required

   You can checkout and edit the document.
5. Click **Accept**.

   If the Verifier rejects the task, the The project working copy document status moves back to the **Being Prepared** state.
6. In the **Accept - Edit task properties** panel, add the required comments.
7. Click **Submit**.

   The task moves for approval.

Approve the document

1. Sign in with document verifier credentials.
2. Click **Tasks** tile.

   You can view all available tasks that are pending for your approval.
3. Click the attachment to view the document in the viewer.
4. On the **Notes** tab, add comments as required

   You can checkout and edit the document.
5. Click **Accept**.

   OR If the Verifier rejects the task, the The project working copy document status moves back to the **Being Prepared** state.
6. In the **Accept - Edit task properties** panel, add the required comments.
7. Click **Submit**.

   The task moves for approval.

Delegate the PVA task

You can delegate a task that is currently in the Running state.

To delegate a task:

1. Click the **Workflow overview** tile.
2. On the **Workflow overview** page, click the PVA task and expand to view the subtasks.
3. Position the pointer over the subtask and click the **More actions** button ••• on the **Inline Action Bar** and then click **Delegate**.
4. In the **Delegate** dialog box, select the available user in the **User** box.
5. Click **Delegate**.

Abort the PVA workflow

You can abort a workflow that is currently in the Running state.

To abort the PVA workflow:

1. Click the **Workflow overview** tile.
2. On the **Workflow overview** page, select a workflow that is in the Running state.
3. Position the pointer over the subtask and click the **More actions** button ••• on the **Inline Action Bar** and then click **Abort workflow**.
4. In the **Abort workflow** dialog box, click **Abort**.

   The workflow status changes to Aborted. The status of the project working copy document changes from **Being Prepared** to **Draft**. The user can resend the working copy document to the PVA workflow.

11.8 Verify and approve an internal project document

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Navigate to the Active Projects folder and select a working copy document or project documents.
3. Position the pointer over the working copy document or project document that is in the **Draft** state and click the **More actions** button ••• on the **Inline Action Bar** and then click **Send to workflow** > **Verify Approve**.
4. In the **Verify Approve** panel, add the required Verifiers and Approvers.
5. Click **Next**.
6. Select the required dates for plan and follow-up.
7. Click **Finish**.

   The document is sent to the verify approve workflow. The status of the working copy or Asset document changes to Req Verification.

Cancel a project document

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Navigate to the Active Projects folder and select a working copy document or project document.
3. Position the pointer over the working copy document or a project document and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Cancel Document**.
4. In the **Cancel Document** panel, click **Submit**.

   The document status changes to **Cancelled** state.

Revert the status of the document

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Navigate to the Active Projects folder and select a working copy document or project document that is in the Cancelled state.
3. Position the pointer over the working copy document or a project document and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Revert to Draft**.
4. In the **Revert to Draft** panel, click **Submit**.

   The document status changes to **Draft** state.

Revert the revision on a document

Revert revisions promotes all draft versions to Reverted and restores the Latest (Und Rev) version back to Latest. You can use the Revert Revision option to revert the project document that is versioned two or more times back to the Latest state.

Note: You must have a project document that is in the Latest state. You must have routed the draft project document through the Prepare verify approve process.

11.9 External review process

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Navigate to the Active Projects folder.
3. Select an external project document that is in the **Placeholder** or **Revised** state.
4. Position the pointer over the project document and click the **More actions** button ••• on the **Inline Action Bar** and then click **Workflow** > **Review External Documents**.
5. In the **Review External Documents** panel, add the reviewers, lead reviewer, and review approver details.
6. Click **Finish**.
7. Sign in with reviewer credentials. For example, **reviewer**.
8. Navigate to the respective project document.
9. Select the project document and add additional review comments.
10. Add the required comments in the project document.
11. Click **Apply**.
12. Follow step 8 through step 11 for lead reviewer and review approver.
13. Sign in with **project controller** credentials. For example, **ao_doc_coordinator**.
14. Navigate to the Active Projects folder.
15. Select the project document that was sent to the external review workflow.
16. Position the pointer over the project document and click the **More actions** button ••• on the **Inline Action Bar** and then select **Latest**.
    The project document status changes to **Latest**.

11.10 Consolidate documents in the Operations folder

In Active Projects, you can select a document and move it to the **Operations** folder.

Here, the active projects will still be in the **Active** state and only a set of documents will be moved to the Operations folder. This is applicable for document and project working copy document.

To consolidate documents in the Operations folder:

1. Sign in with project controller credentials.
2. Navigate to the Active Projects folder.

3. Select a document that is in the **Latest** state.

   You can select more than one document.

4. Position the pointer over the project document and click the **More actions** button ••• on the **Inline Action Bar** and then select **Return to Ops**.

   The document will be moved to the **Operations** folder.

   You can follow the same steps for sending the **Project Working Copy** back to **Operations** folder.

Note: When you move the document to **Operations** folder, the document is added to the respective **Operations** > **<Facility_Name>** > **<Area>** > **<System>** folder path and a project working copy document is moved to **Operations** > **Projects** > **<Project Number>** > **<Working Copy>** folder path. When a project working copy is moved back to **Operations** folder the project controller must validate the changes and accordingly update the working copy document that already exists in **Operations** folder.

11.11 Close a project

Closing a project enables the project controller to share the latest content in the Operations folder for use or for consolidation with the source as-built. Also, closing a project disables the new project content creation and moves the project content into a closed project area.

To close the project:

1. Sign in with project controller credentials.
2. Navigate to the Active Projects folder. Select one of the projects that you want to close.

   Note: All the project documents must be in the **Latest** or **Cancelled** state before closing a project.

3. Position the pointer over the project config and click the **More actions** button ••• on the **Inline Action Bar** and then select **Lifecycle > Close Project**.
4. In the **Close Project** panel, select a required target state for project Document and Working Copy.
5. Click **Submit**.

   The status of the project changes from **Pending Closure** to **Closed**.

   After the close project job runs the project documents that are in the **Latest** state moves to the Operations area and the working copy is moved to the Working Copy folder in the Operations area.

   If any error occurs, the project state changes to **Invalid**. Double-click on the project config to view the error message. You must correct the error and retry to closing the project.

Notes

- You can notice the Project documents that are checked out remain in the Active Projects folder. The project cannot be closed until the Project Document is checked in or the checkout is cancelled.
- All the Projects documents that are marked as Do Not Move to Operations area can be viewed in the Closed Projects folder.

11.12 Consolidate comments by using Brava

In OpenText Core Collaboration for Engineering, you can a add primary document to an existing deliverable and resend the document to OpenText Documentum CM for Engineering.

11.12.1 Send the external document to the review workflow

1. Sign in with project controller credentials.
2. Navigate to the Active Projects folder.
3. Select a **Revised** document that is shared from the OpenText Core Collaboration for Engineering environment.
4. Position the pointer over the project document and click the **More actions** button ••• on the **Inline Action Bar** and then select **Lifecycle > Review External Documents**.
5. In the **Planning/Sending of workflow** panel, add reviewers, lead reviewer, and approvers.

   Note: In a review workflow, users added by using the distribution matrix must be available in the project config.

6. Click **Send**.

   The status of the document changes to **For Review**.

11.12.2 Review the external documents

1. Sign in with reviewer credentials.
2. In the **Tasks list**, select **Review Supplier Documents** task.
3. In the **Attachments** pane, select the document for which you want to add markup or annotate.

   You can use the **Intelligent Viewer** or **Brava! Viewer** to view the document.

11.12.3 Approve the consolidated comments

1. Sign in with approver credentials.
2. Navigate to the **Tasks** tab, and select the task with **Approve Supplier Document** subject.
3. On the **Attachments** pane, select the document for which you want to add markup or annotate.
4. Select the task and click **Accept**.
5. In the **Accept-Add electronic signature** pane, add the approver credentials to approve the comments.
6. Click **Submit**.

11.12.4 Send consolidated comments to OpenText Core Collaboration for Engineering

Note: If the document is approved, right-click the document and select **Latest**.

To send the consolidated comments to OpenText Core Collaboration for Engineering:

1. Sign in with project controller credentials.
2. Navigate to the document that contains the approved comments.
3. Position the pointer over the project document and click the **More actions** button ••• on the **Inline Action Bar** and then select **Share Feedback> PDF +Comments** to share with the Supplier.
4. Click **Submit**.

Note: The status of the document changes to Queued and further the document is sent to OpenText Core Collaboration for Engineering.

If you want to send the document that has consolidated comments to OpenText Core Collaboration for Engineering with the help of project transmittal, the environment must have Advanced Document Transformation Services (ADTS) installed.

Chapter 12

Distribution list

12.1 Create a distribution list

Distribution lists define the recipient list for transmittals. A distribution list can be reused across different transmittals and transmittal templates. The base type for distribution lists is **ao_distribution_list**. Project controller creates a distribution list that is applicable for transmittals of an active project. The distribution list can be created as new or from existing distribution list. The distribution list saves to the Distribution Management folder under the respective facility folder. After the distribution list status is changed to Published it is applicable to specific facility

Note: You must add ao_doc_controllers in form managers and users property to ensure that have access to view the distribution list that is in Being Prepared status.

Create a distribution list:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile and navigate to **Operations** > **Projects**.
3. Click the **Add item** button + and then click **Add file**.
4. In the **Create Type** dialog box, in the **Category** list, select **Distribution List**.

   The **Distribution Template Types**, **Use source content** details and the **Properties** check box are selected by default.
5. Click **Continue**.
6. In the **Edit Properties** dialog box, specify the other relevant details:
   a. In the **Description** box, type the Description.
   b. Click **Distribution** and in the **Recipients Details** area, select **Type**, **Company**, **Group**, **Name**, **Email**, and **Delivery Method** details.
   c. Click **Close** button <.
   d. Optional Click **Scope** and select **Document Type Name**, **Facility**, **Area**, **System**, **Sub-System**, **Project Number** details and type **Work Order Task** details.
   e. Click **Close**.
   f. Click **Access Control**, in the **Form Manager**s list, select the required one or more managers and in the **Form Users** list, select the required one or more users.

g. Click **Continue**.

h. In the **Edit file** dialog box, click **Close**.

12.2 Apply a distribution list

You can apply distribution list to the project transmittal or transmittal template. The distribution list must exist in the same facility folder.

Apply a distribution list to a project template:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Navigate to **Active Projects** > **Facility** > **3. Transmittal Templates**.
3. Position the pointer over the transmittal template that is in **Being Prepared** state and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Apply Distribution list**.
4. In the **Apply Distribution list** dialog box, in the **Distribution list**, select the required published distribution list.
5. For **Overwrite Existing Recipient List?**, select **F** or **T**.
6. Click **Submit**.

12.3 Associate a coversheet

Coversheet templates define coversheet branding, layout, and embedded content.

Associate a coversheet with project transmittal or transmittal template:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. To associate with a transmittal template, navigate to **AO Library** > **Templates** > **Transmittal Templates** folder.
3. To associate with a transmittal, navigate to **AO Transmittals** > **General Transmittal** folder.
4. Position the pointer over the transmittal template/transmittal that is in **Being Prepared** state and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Associate Coversheet Template**.
5. In the **Associate Coversheet Template** dialog box, in the **Transmittal list**, select the required coversheet.
6. Click **Submit**.

12.4 Generate a coversheet

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. To generate with a transmittal, navigate to **AO Transmittals** > **General Transmittal** folder.
3. Position the pointer over the transmittal that is in **Being Prepared** state and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Generate Coversheet**.
4. In the **Generate Coversheet** confirmation dialog box, click **Continue**.

Chapter 13

Distribution matrix

Distribution matrices enable you to quickly set up the distribution of a transmittal or documents based on a predefined matrix. The matrix can be set up with a number of conditions that can be reused. You can import the distribution matrix details using a spreadsheet. The spreadsheet provides the details of the distribution matrix and recipient info.

13.1 Import a distribution matrix template

You can import the distribution matrix to the Operations and Active Projects folder.

13.2 Import a distribution matrix template to operations

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click **Document list** tile.
3. Select **Operations**, click the **Add item** button + and then click **Upload file**.
4. In the **Upload** dialog box, click the **Upload files** icon and select the distribution matrix template that you want to import to the facility folder.
5. Click **Continue**.
6. In the **Create Type** dialog box, in the **Category** list, select **AO Distribution Matrix**.

   If required select the **As blueprint for Properties** check box.
7. Click **Continue**.
8. In the **Edit Properties** dialog box, in the **General** area, select the required **Facility** and the **Category**.
9. In the **Users** area, select the required **Users** and the **Managers**.

   Note: If required, you can edit the distribution matrix template name.
10. Click **Continue**.

    The newly added distribution matrix gets imported to the **Operations** folder. This template is created in `/Operations/<Facility_Name>/Distribution Management` folder.

Note: Here, by default the distribution matrix is in **Being Prepared** state.

13.3 Import a distribution matrix template to active projects

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Select **Active Projects**, click the **Add item** button + and then click **Upload file**.
4. In the **Upload** dialog box, click the **Upload files** icon and select the distribution matrix template that you want to import to the facility folder.
5. Click **Continue**.
6. In the **Create Type** dialog box, in the **Category** list, select **AO Distribution Matrix for Projects**.

   If required select the **As blueprint for Properties** check box.
7. Click **Continue**.
8. In the **Edit Properties** dialog box, in the **General** area, select the required **Facility** and the **Category**.
9. In the **Users** area, select the required **Users** and the **Managers**.

   Note: If required, you can edit the distribution matrix template name.
10. Click **Continue**.

    The newly added distribution matrix gets imported to the **Active Projects** cabinet. This template is created in `/Active Projects/<Facility_Name>/Distribution Management` folder.

    Note: Here, by default the distribution matrix is in **Being Prepared** state.

13.4 Validate the distribution matrix

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Navigate to **Operations/Active Projects** > **Facility** > **Distribution Management**.
4. Select the distribution matrix template that is in **Being Prepared** state, position the pointer over the document and click **More action** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Validate**.

Note: The application validates the distribution matrix template values in the **Distribution Matrix** and **Recipient Info** tab. You must refer to the content that is documented in the Instructions tab to add or update the values in the distribution matrix template.

If the values in the distribution template match with the required format, the template status changes to **Valid**. If the template values do not match the requirements, the status changes to **Invalid**.

Note: If the status changes to **Invalid**, you can refer to the newly added **Errors** sheet that displays the details of the error message.

5. After you check-in the updated distribution template, the status changes to **Being Prepared**.
6. Position the pointer over the distribution matrix and click **More action** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Validate**.

   If the distribution matrix values match with the requirement, the status changes to **Valid**.
7. Position the pointer over the distribution matrix that is in **Valid** state and click **More action** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Publish**.

   The status changes to **Published**.
8. In Published state, you can navigate to **Lifecycle** > **Generate 'Excel'** to generate an Excel file.
9. If required, you can navigate to **Lifecycle** > **Make 'Inactive'** to change the **Published** to **Inactive** status.

Note: You can still generate an excel sheet when the distribution matrix is in the Inactive state.

13.5 Export a distribution matrix

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Navigate to **Operations/Active Projects** > **Facility** > **Distribution Management**.
4. Select the distribution matrix template that is in **Valid** state, position the pointer over the distribution matrix and click **More action** button ••• on the **Inline Action Bar** and then click **Lifecycle** > **Generate Excel**.

Note: You can still generate an Excel sheet when the distribution matrix is in the Inactive state.

5. Navigate to **Renditions** tab.
6. Select the exported rendition template.
7. Right-click and select **Export rendition**.
8. Save the newly generated Distribution matrix template.

13.6 Apply distribution matrix for a transmittal

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Click the **Document list** tile.
3. Navigate to **AO Transmittals** > **General Transmittal**.
4. Select the check box of one of the transmittals that is in **Being Prepared** state and click **Apply Distribution Matrix**.
5. In the **Apply Distribution Matrix Dialog** box, in the **Distribution Matrix**, select the required distribution matrix.
6. Select the required **Matching Criteria** either **Match any documents** or **Match all documents**.
7. Select the **Overwrite** buttons either **Yes** or **No**.

Note: The Apply Distribution Matrix option is enabled only for the transmittal that is in Being prepared state and if the transmittal contains one or more documents.

Chapter 14

Document loading

The Document Loading feature helps to create or update documents in bulk. The application reads the Excel file associated with the Document Loading object.

Each row in the document loading spreadsheet contains:

- Metadata to be updated for a document
- Relative location of the content file to be loaded onto the document object

Administrators (or ao_admin) can create content templates (spreadsheet) that you can use in Document Loading.

14.1 Create a document loading spreadsheet

Document Loading spreadsheet contains one mandatory sheet that contains the details of the documents that must be loaded to the application. The spreadsheet has a header row which specifies names for each column. Every other row in the sheet corresponds to a document to be created or updated.

Leave the first column blank for updating the validation or processing status of each row. Ensure that the names of all other columns match the keys that are defined in the **AO Document Loading Sheet Config Dictionary**.

Apart from keys corresponding to **Storage Path** and **Lifecycle State**, every other key in this dictionary corresponds to an attribute on the document object where the respective column value is stored. Each column header represents the attribute in which the respective column value is stored for each row.

Storage Path: Specify a relative path (relative to the Path value stored on the Document Loading Object) to the content file to be used for that row's document.

Lifecycle State: Provide a lifecycle state to which a document must be transitioned. While creating a new document OpenText Documentum CM for Engineering creates a document with a base state and then changes the state as per the defined value in a column.

OpenText Documentum CM for Engineering creates or updates the values based on the available data in the spreadsheet irrespective of the number of columns defined. The validation rules associated with the respective document type and object type combination determine the validity of data in the spreadsheet. OpenText Documentum CM for Engineering does not process empty cells, unless the respective column is defined as mandatory in the validation rule. If you want to clear any values from an existing attribute, you can specify BLANK for the respective cells.

Perform the following steps to create a document loading spreadsheet:

Create a document loading spreadsheet:

1. Sign in with author credentials. For example, **ao_author**.
2. Click the **Operations** tile.
3. Position the pointer over the Operations folder and click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, in the **Category** list, select **Document Loading**.
5. Click **Continue**.
6. In the **Edit Properties** dialog box, provide the following details:
   a. **Name**: Type the document loading sheet name.
   b. **Storage Type**: Represents the type of storage used for locating the content files used for documents. You can select **Local Drive** or **Repository Path** for storage type.
   c. **Path**: Represents the value of the root path using which Asset Operation locates the content files, in conjunction with the relative path stored against each row in the spreadsheet. For **Storage Type** of **Local Drive** specify the hard drive or network shared drive location accessible from the OpenText Documentum CM Server. For example, `C:/Doc Loading`. For **Storage Type** of **Repository Path** specify the folder path in the repository. For example, `/Temp/ao_author/`.

      For importing the files to temp location in the repository, refer to "Import files to a temp folder" on page 103.
   d. **Creation Profile**: Specify the name of the creation profile (such as AO Artifacts) to identify various client configurations such as default values template and lifecycle. Use this profile while creating or updating a document.
   e. **Document Type**: Specify the name of the corresponding artifact name (such as CAT1, CAT2) for the selected creation profile. If the creation profile uses multiple dictionaries and properties to define an artifact, then the value of document type used must contain the property values, which are unique to that creation profile. For example, in Project Document Loading, the release version of OpenText Documentum CM for Engineering uses the **Project Document Type** property of the creation profile. So, in a project's creation profile the possible values for **Project Document Type** must be unique.
   f. **Matching Rules**: Specify the required matching rule. Refer to "Define matching rules" on page 105 to create matching rules.
   g. **Facility**: Select a required facility.
7. Select the Project Number and Project Title details.

- Form Managers: Specify the users who can contribute to the document loading sheet and can run operations such as validating and processing the document loading spreadsheet.
- Form Users: Specify the users who can read the document loading spreadsheet.

8. Click **Continue**.
9. In **Choose template**, select the required document loading template. You can select one of the predefined document loading templates.
10. Click **Continue**.

    The document loading sheet is created with a **Draft** status.

    You can edit the spreadsheet to add the required metadata and content location details for the documents to be created or updated.

14.2 Import files to a temp folder

1. Sign in with author credentials. For example, **ao_author**
2. Click the **Operations** tile.
3. Position the pointer over the **Operations** folder and click the **Add item** button +, and then click **Upload file**.
4. In the **Upload** dialog box, click the **Upload files** button +, or drag content into the main folder or subfolders in the browser window.
5. Select the required document and click **Open**.
6. Click **Continue**.
7. Select **Import Files to Temp Folder** for category, and **Import Files to Temp** for AO Document Type.
8. Click **Continue**.
9. In the **Edit Properties** dialog box, add the required details.
10. Click **Continue**.

    The imported documents is available in the **/Temp/<login_user>** folder. For example: `/Temp/ao_author/`.

14.3 Refresh dictionaries in document loading spreadsheet

If a document loading spreadsheet contains a sheet named Dictionaries, you can use the refresh dictionaries action to update the dictionary values from OpenText Documentum CM for Engineering.

Refresh dictionaries in document loading spreadsheet:

1. Sign in with author credentials. For example: **ao_author**
2. Click the **Operations** tile.
3. Position the pointer over the draft document loading spreadsheet and click the **More actions** button ••• on the **Inline Action Bar**, then select **Lifecycle > Refresh Dictionaries**.
4. Position the pointer over the draft document loading spreadsheet and click the **More actions** button ••• on the **Inline Action Bar**, then select **Open in Brava! Viewer** to view the spreadsheet with updated dictionary values.

Note: You can configure the name of the Dictionaries sheet, BLANK values and other details to custom values using the keys in the **AO Document Loading Config** dictionary.

14.4 Validate a document loading spreadsheet

For more information about creating validation rules, see "Define validation rules" on page 106.

Validate a document loading spreadsheet:

1. Sign in with author credentials. For example: **ao_author**
2. Click the **Operations** tile.
3. Navigate to the **Document Loading** folder.
4. Position the pointer over the document loading sheet and click the **More actions** button ••• on the **Inline Action Bar**, then select **Lifecycle > Validate Now** for immediate validation and select **Send for Validation** if you want the execution to occur in the background.

   OpenText recommends using the second option for a spreadsheet with several rows.

   The status of the document loading sheet changes to **Validated** if the spreadsheet is configured as required. Else, the status of the document loading sheet changes to **Error**.

   In the Properties dialog box, navigate to the **System Info** tab to view the error message details.

5. Position the pointer over the document loading spreadsheet and select **View** to review the processing status of the newly added row details.

6. In **Processing Status** column, you can view the status for every row.

   If all the column values for a row are valid, the processing status is updated as valid. For example, **Valid [Create new document]**. If the value in any column in a row is invalid, the row status is updated as invalid. For example, **Invalid [Create new document]**. You can view the error messages as comments on the particular row.

   The column value changes based on the action you select while creating the document loading spreadsheet. For example, if you select overwrite, the **Valid [Document updated]** message appears.

14.5 Process a document loading spreadsheet

You can process only a validated document loading sheet. You can process a document loading sheet even if there are a few invalid rows. OpenText Documentum CM for Engineering processes only the valid rows.

Process a document loading spreadsheet:

1. Sign in with author credentials. For example: **ao_author**

2. Click the **Operations** tile.

3. Navigate to the **Document Loading** folder.

4. Position the pointer over the document loading sheet and click the **More actions** button *** on the **Inline Action Bar**, then select **Process**.

   The status changes to **Processing** and further changes to **Processed** after the **EPFMAProcessDocumentLoading** job is executed.

   Navigate to the respective folder to view the new or updated documents.

14.6 Define matching rules

You can use matching rules to identify existing documents in OpenText Documentum CM for Engineering which match with the metadata provided in the spreadsheet. The matching rule also defines the action to take when a match is found, such as creating a new major or minor version, overwriting, ignoring, or creating a new document altogether.

You can also associate multiple matching rules to a document loading object. If no match is found on the first rule, OpenText Documentum CM for Engineering tries to find a match using the next associated matching rule. If no match is found among any of the associated matching rules, OpenText Documentum CM for Engineering creates a new document.

Define the matching rules:

1. Sign in with Administrator credentials. For example: **ao_admin**
2. Click the **Operations** tile.
3. Navigate to **AO Library**.
4. Position the pointer over the **AO Library** and click the **Add item** button +, and then click **Add file**.
5. In the **Create type** dialog box, in the **Category** list, select **Document Loading Configuration**.
6. Select **Matching Rule** for AO document type.
7. Click **Continue**.
8. Type the required name for the matching rule.
9. In **Rule Definition** area, select **Major Version** or **Minor Version** or **New**, or **Ignore**, or **Overwrite** based on the requirement for Action.
10. For Spreadsheet Attributes, select the required attribute name that is defined in the predefined spreadsheet and select the matching existing attribute.

    Likewise, you can add the required number of matching rules for the attributes that you plan to import. Also, you can define the user and manager associated with the matching rule.
11. Click **Continue**.

    The newly created matching rule is automatically added under the `AO Library/Document Loading Configuration/Matching Rules` cabinet.

14.7 Define validation rules

Validation rules are defined to validate data in each row of the document load sheet. You can define a validation rule to validate the data in each row of the document load sheet. The rule must be based on the respective document types in client configurations. For example, you can define properties as mandatory, not updatable during edit, retrieve values from dictionary or taxonomy.

For a document type and object type combination, you can define the following types of validation rules:

- Validation rule for creating a document
- Validation rule for updating a document
- Validation rule for create or update: This rule is applicable only when either of the above two rules does not exist.

Note: If validation rules have not been defined, OpenText Documentum CM for Engineering follows the **Default Validation Rule**.

Define validation rules:

1. Sign in with your Administrator credentials. For example, **ao_admin**.
2. Click the **Document list** tile.
3. Position the pointer over the **AO Library**, click the **Add item** button +, and then click **Add file**.
4. In the **Create Type** dialog box, select **Document Loading Configurations** for Category.
5. Select **Validation Rule** for AO Document type.
6. Click **Continue**.
7. Type the Validation rule name.
8. Select object type.
9. Select the corresponding document type.
10. For Action Type, select **Create/Edit** or **Create** or **Edit**. By default the **Create/Edit** option is selected.
11. For Enabled, you can select **Yes** or **No**.
12. Select the required Asset facility.

    Note: The **ao_admin** and **Administrators** can further customize the validation rules in each area.

13. Update the following areas to define the required validation rules:

    a. **Required Attributes**: Define the required attributes that must be filled with values in the document loading spreadsheet. Blank entries in the required attribute columns result in validation errors in the corresponding entry row.

    b. **Updatable Attributes**: Updatable attributes can be modified in document loading spreadsheets. If there is an entry in a column that is defined as not updatable validation errors will occur.

    c. **Constraints Configuration**: Constraint configuration defines the conforming regular expressions for document loading spreadsheet entries. Entries not confirming to the specified regular expressions result in validation errors in the corresponding entry rows.

    d. **Dictionary Configuration**: Entries not matching a value in the specified dictionary result in validation errors in the corresponding entry rows.

    e. **Taxonomy Configuration**: Taxonomy configurations specify dependent entry values for document loading spreadsheet entries. Dependent entries not matching the specified taxonomy value sets result in validation errors in the corresponding entry rows.

In the taxonomy configuration tab, you must add the first level of taxonomy and if required you can add the subsequent levels of the taxonomy. The validation rule validates the taxonomy till the specified level.

f. **DQL Configuration**: Defines the DQL queries for spreadsheet entries. Entries not confirming to the specified DQL queries result in validation errors in the corresponding entry rows.

For more information about validating a repeating attribute, see "Validate a repeating attribute" on page 108

14. Click **Continue**.

Note: You can create the required number of validation rules. Validation rule is a unique combination of Object Type, Document Type, and Action Type.

14.7.1 Validate a repeating attribute

You can now provide comma separated values for the last level of the taxonomy in a single cell of the document loading spreadsheet. Use a DQL query to configure a repeating attribute for the last level of taxonomy. This is validated using the DQL Configuration of the Validation rule.

For example, For a four level taxonomy, you can use Taxonomy configurations to configure the first three levels of the taxonomy. The last level of the taxonomy can be configured by using the DQL configuration.

Validate a repeating attribute for the last level of taxonomy:

1. Log in with Administrator credentials. For example, **ao_admin**.
2. Click the **Document list** tile.
3. Select the **AO Library**, click the **Add item** button +, and then click **Add file**.
4. In the **Create Type** dialog box, select **Document Loading Configurations** for Category.
5. Select **Validation Rule** for AO Document type.
6. Click **Continue**.
7. Select other required options.
8. Select the required updates for other validation rules.
9. In the DQL Configuration area, you can select the required Attribute name.
10. Add the required DQL statement.

Note: The DQL statement can also be used to query a repeating attribute.

14.8 Default validation rule

The Default Validation rule is created while installing OpenText Documentum CM for Engineering. If there are no defined matching or validation rules, then OpenText Documentum CM for Engineering follows the default validation rule.

Define a validation rule:

1. Sign in with Administrator credentials. For example, **ao_admin**
2. Click the **Document list** tile.
3. Navigate to **AO Library > Document Loading Configuration** cabinet.
4. In the **Document list**, select the **Default Validation Rule**.
5. Position the pointer over the default validation rule and click the **More actions** button ••• on the **Inline Action Bar**, then select **Properties**.

   In the **Properties** dialog box, Name, Object Type, and Action Type are selected by default. You can customize other attributes as per your requirement.

14.9 Import a document loading template

Import a document loading template:

1. Sign in with Administrator credentials. For example, **ao_admin**.
2. Click the **Document list** tile.
3. Navigate to **AO Library > Templates > Document Loading Templates**.
4. Position the pointer over the document loading template and click the **Add item** button + and then click **Upload file**.
5. In the **Upload** dialog box, click the **Upload files** button +, or drag customized document loading template into the main folder or subfolders in the browser window.
6. Click **Continue**.
7. Select **Administration Artifacts** for category, and **Document Loading Template** for artifacts.
8. Click **Continue**.
9. Provide the required name for the customized Document Loading Template.
10. For reviewers, select the required reviewer.
11. Click **Continue**.

    The newly created document loading template is added in the **Operations** folder.

Note: To import a Project Document Loading Template for Active Projects, you must select **Project Document Loading Template** option for the artifact.

The new document loading template is added in the **Active Projects** folder.

14.10 Create a document loading template

Create a document loading template:

1. Sign in with Administrator credentials. For example, **ao_admin**.
2. Click the **Document list** tile.
3. Navigate to **AO Library > Templates > Document Loading Templates > Operations**.
4. Position the pointer over the operations folder and click the **Add item** button and then click **Add file**.
5. In the **Create type** dialog box, select **Administration Artifacts** for category, and **Document Loading Template** for artifacts.
6. Click **Continue**.
7. In the **Edit Properties** dialog box, type the name for document loading template.
8. Click **Continue**.

   A new document loading template gets created in the Operations folder.

14.11 Create a document loading template for Active Projects

Create a document loading template for Active Projects:

1. Sign in with Administrator credentials. For example, **ao_admin**.
2. Click the **Document list** tile.
3. Navigate to **AO Library > Templates > Document Loading Templates > Active Projects**.
4. Position the pointer over the active projects and click **Add item** button and then click **Add file**.
5. In the **Create type** dialog box, select **Administration Artifacts** for category, and **Project Document Loading Template** for AO admin Artifacts.
6. Click **Continue**.

7. In the **Edit Properties** dialog box, type the name for project document loading template.
8. Click **Continue**.

   A new project document loading template gets created in the Active Projects folder.

14.12 Change the status of document loading template

1. Sign in with Administrator credentials. For example, **ao_admin**.
2. Click the **Document list** tile.
3. Navigate to **AO Library > Templates > Document Loading Templates > Active Projects**.
4. Select the newly created project document loading template.
5. Position the pointer over the project document and click the **More actions** button *** on the **Inline Action Bar**, then select **Lifecycle > Make Efffective**.

   The document loading status changes to **Effective**.

Chapter 15

Reports

The Landing page comprises of default and configured tiles. The tiles that appear on the page are determined by your Smart View configuration.

The Reports feature allows users to access reports templates through the **Reports** tile on the Landing page. Users can perform Reports tasks based on the permissions granted to them according to their roles in the organization.

15.1 Run a report

You can view the report in the Report viewer or on a new page depending on the settings configured in the client configuration.

To run a report:

1. Click the **Reports** tile on the Landing page.
2. Select the report check box on the **Reports** page. For example: Documents created by Group, Active Workflow by Process, and Transmittals created by Vendor.
3. Select **Run** on the **Action Bar**.
4. In the Reports page, for Group Name, select any of the available group name.
5. Click **Submit**.
6. In the report column header, select any of the column name to sort the output values.
7. Select a format for the generated report details and Click the **Save** button 

.

   Here, the generated report saves to the client system.

Chapter 16

OpenText Core Collaboration for Engineering Connector

You must create a Supplier Document Schedule (SDS) and attach an Asset document that is in the draft state and then share the Supplier Document Schedule with the Supplier.

16.1 Create a collaboration workspace

Create a Supplier Document Schedule

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Click the **Document lists** tile in the OpenText Documentum CM for Engineering Landing page.
3. Position the pointer over **Operations** folder and click the **Add item** button +, and then click **Add file**.
4. In the **Create type** dialog box, select **Supplier Document Schedule** for category.
5. Supplier Document Schedule is selected by default for AO Document Type.
6. Click **Continue**.
7. In the **Edit Properties** dialog box, type the following details.
    a. Supplier document schedule name
    b. Title
8. Select the PO Number.

    Note: AO Administrator can add the required PO numbers in Asset PO Number dictionary.
9. Select the OpenText Core Collaboration for Engineering site.
10. Click **Classifications** area.
11. In the **Classifications** area, for Supplier, select the **Project Name** and **Project Number** details
    a. For Supplier Details, select the required **Supplier Name** and **Supplier Number**.
    b. For Supplier Contacts, select the **Supplier Company**, **Supplier Group**, **Supplier Name**, and **Supplier Email**.

12. Click **Continue**.
13. In the Edit file dialog box, select **Edit now** or **Edit later**.
14. Click **Close**.

    The SDS supplier schedule appears in the Document list with **Being Prepared** status.

16.1.1 Create asset document

1. Click the **Operations** tile.
2. In the Operations folder, navigate to a project folder, click the **Add item** button +, and then click **Add file**.
3. In the **Create type** dialog box, select **Asset Document** for category.
4. Select the required document category.
5. Click **Continue**.
6. In the **Properties** dialog box, type the required name.
7. Next to **Supplier Document Schedule**, select the PO Number, Issue Reason, Revision, Planned Date, and Response Date.

   The PO number is generated from the PO dictionary.
8. Click **Continue**.

   The new asset document appears in the Document list.

   Note: You must ensure that the PO Number selected while creating the Asset Document is same as the PO number used while creating a SDS supplier document.

16.1.2 Attach Asset Document with Supplier Document Schedule

1. Select the Asset Document and click the **More actions** button *** on the **Inline Action Bar** and then click **Attach to Supplier Document Schedule**.

   Note: You must create a document with the required PO number to attach the document to the SDS. The SDS also uses the same PO number.
2. Click **Continue**.
3. In the **Relations** area, you can view that the SDS is linked with the Asset Document.
4. Navigate to the SDS path.
5. In the **Confirmation** dialog box, click **Yes**.

16.1.3 Send Supplier Document Schedule to Supplier

Supplier Document Schedule (SDS) is created in OpenText Core Collaboration for Engineering with Project title and project number combination.
Whenever you send two different Supplier Document Schedule from two OpenText Documentum CM for Engineering projects that contains the same project number but has different title, then OpenText Documentum CM for Engineering Connector verifies the title and number combination and then creates the OpenText Core Collaboration for Engineering projects accordingly.

If a deliverable is sent from any of the existing Supplier Document Schedule, then newly sent asset document is attached to the correct project number and title combination.

Note: OpenText Documentum CM for Engineering validates the documents that are attached to SDS that are not checked out and names are unique before sending it to the OpenText Core Collaboration for Engineering. If validation fails, a message appears and you can resolve the issue before you resend the SDS. If an error occurs when sending to OpenText Core Collaboration for Engineering, the status of the Supplier Document Schedule is changed to Invalid. An email notification is sent to Authors and Administrators.

Send the Supplier Document Schedule to Supplier:

1. Navigate to the **Projects** folder.
2. Select a Supplier Document Schedule document that is in **Being Prepared** status and click the **More actions** button *** on the **Inline Action Bar** and then click **Lifecycle** > **Share with Supplier**.
3. In the **Confirmation** dialog box, click **OK**.

   The status of the SDS and the attached deliverables changes to **Queued**.

   Note: Here, equivalent of OpenText Documentum CM for Engineering project number is Project code in OpenText Core Collaboration for Engineering and equivalent of OpenText Documentum CM for Engineering project title is name of the project in OpenText Core Collaboration for Engineering.

16.1.4 Verify the contract in OpenText Core Collaboration for Engineering

1. Sign in to the OpenText Core Collaboration for Engineering with the required credentials.

   The new contract is listed under a project.

2. Click the contract to view the document being added.

3. In the **Deliverables** screen, click the **Members** icon to view the list of members added to this contract.

16.2 Review the deliverable

The Import AO Document job returns the primary document attached to the deliverable in OpenText Core Collaboration for Engineering back to the OpenText Documentum CM for Engineering repository. In OpenText Documentum CM for Engineering, the status of the document changes to draft and the owner of the document receives an email notification of the returned document.

Send the new version of the document for review:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**

2. To send the returned deliverable for review, select the draft version of the document.

3. Position the pointer over the returned deliverable and click the **More actions** button *** on the **Inline Action Bar** and then click **send to workflow** > **Submit Supplier Document for review**.

   Notes

   - Supplier can reopen a submitted document again in OpenText Core Collaboration for Engineering if the document is in **Revised** state in OpenText Documentum CM for Engineering.
   - Whenever a document is in a Review workflow or in a Revised state in OpenText Documentum CM for Engineering and during this state if Supplier reopens a document in OpenText Core Collaboration for Engineering and submits to OpenText Documentum CM for Engineering, then the status of the reopened document changes to **Rejected** and the return code is set to **Failed Auto-Validation: Document cannot be accepted in AO in current state**. But, OpenText Documentum CM for Engineering user can still submit the document to OpenText Core Collaboration for Engineering after the review workflow process. The status of the document in OpenText Core Collaboration for Engineering remains as Rejected and the return code for the document in OpenText Core Collaboration for Engineering is updated as per OpenText Documentum CM for Engineering.

4. In the **Pending/Sending of workflow** dialog box, add the required recipient's details. The status of the document changes to For Review.
5. Sign in with reviewer credentials, and select the task that is pending for review.
6. Select the attachment to view the PDF preview and relations. If required, reviewer can annotate the document.
7. In the **Task list** tile, click the **More actions** button *** and select **Accept task**.
8. In the **Accept** dialog box, add the required comments.
9. In the **Forwarding –Task properties** dialog box, select the required return code.
10. Click **Next**. The document status changes to Reviewed.

    Note: You must repeat the steps from 5 through 10 for additional reviewers.

11. To send the document back to OpenText Core Collaboration for Engineering, click the **More actions** button *** and select **Send Feedback**.
12. In the **Change State** dialog box, for **Rendition to share with Supplier**, select PDF or source.
13. Click **Next**. The status of the document changes to Approved state.

16.2.1 Consolidate the changes

1. Sign in with **Consolidator** credentials.
2. Select the task that is in pending for review.
3. In the **Attachments** tab, select the document to view the PDF preview and relations details.
4. If required, Consolidator can annotate the document. In addition, you can use the edit annotation to consolidate the document.
5. In the **Task list** tile, click the **More actions** button *** and select **Accept task**.
6. In the **Forwarding-Task 'Document Name' is ready for review** dialog box, add the required comments.
7. Click **Next**. The OpenText Documentum CM for Engineering Connector sends the review comments back to the ao_doc_coordinator.

16.2.2 Send the review changes to supplier

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Select the attachment to view the comments.
3. Click **OK**. The workflow is moved to completed status.
4. Select the and document and click the **More actions** button *** and select **Send Feedback** to send the feedback to the Supplier.
5. In the **Change State** dialog box, in **Rendition to share with Supplier**, select **PDF** or **PDF+Comments** option.
6. Click **Continue**.

Note: The status of the document changes to Queued state. Every time the send feedback job runs, the AO Connector sends the comments to the OpenText Core Collaboration for Engineering and the Supplier is notified that the deliverable is returned with comments. The review deliverable process can be iterative until the reviewers and the SDS Managers approve the initial review.

16.3 Approve the deliverable

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. To send the document for approval, select the Reviewed version of the document.
3. Position the pointer over the revised version of the document and click the **More actions** button *** and select **send to workflow** > **Submit Supplier Document for review**.
4. In **Planning/Sending of workflow** dialog box, add the required recipient's details.

Note: The status of the document changes to **For Approve**. For CAT1 document two levels of approvals is required. For CAT3 document, ao_coordinator can directly change the status to **Effective**.

5. Sign in with approver credentials.
6. Select the task that is pending for review.
7. Select the attachment to view the PDF preview and relations. If required, reviewer can annotate the document.
8. In the **Task list** tile, click the **More actions** button *** and select **Accept task**.
9. In the dialog box add the required comments.

10. Click **Continue**.
11. In the **Forwarding –Task properties** dialog box, select the required return code.
12. Click **Continue**. The document status changes to Approved.

> **Note:** You must repeat the steps from 5 through 12 for additional approvers.

16.4 Approve the changes

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. In the **Attachments** area, select the attachment and verify if the document is in **Release Pending** state.
3. In the **Task list** tile, click the **More actions** button *** and select **Accept task**. The document status changes to effective and the workflow status is changed to completed.

> **Note:** For CAT1 document, the OpenText Documentum CM for Engineering provides options to mark the document to effective in future date and changes to To-Be-Read process.

Every time the close deliverable job runs, the OpenText Documentum CM for Engineering Connector updates the corresponding deliverable in OpenText Core Collaboration for Engineering with **return code = Accepted** and sends an email notification to the Supplier that the doc has been accepted.

Send General Transmittals to OpenText Core Collaboration for Engineering:

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**
2. Select AO Transmittals folder, click the **Add item** button +, and then click **Add file**.
3. Select **Transmittal** for Category.
4. Select **General Transmittal** for Transmittal category.
5. Click **Continue**.
6. In the Edit properties dialog box, navigate to **Transmittal Info** tab.
7. In the **Transmittal Info**, select the required option for **Issued for Reason**, **From**, and **To**.
8. Select the required output format for Transmittal Output Format.
9. For Supplier Document Schedule, select the **PO number**. The OpenText Core Collaboration for Engineering site displays a default name based on the selected PO number.

Note: Equivalent of OpenText Documentum CM for Engineering project number is Project code in OpenText Core Collaboration for Engineering and equivalent of OpenText Documentum CM for Engineering project title is name of the project in OpenText Core Collaboration for Engineering.

Supplier Document Schedule is created in OpenText Core Collaboration for Engineering with Project title and project number combination.

Whenever you send two different transmittals from two OpenText Documentum CM for Engineering projects that contains the same project number but has different project title, then OpenText Documentum CM for Engineering Connector verifies the title and number combination and then creates the OpenText Core Collaboration for Engineering projects accordingly.

If a transmittal is sent from any of the existing OpenText Documentum CM for Engineering projects, then the transmittal is attached to the correct project number-project title combination in OpenText Core Collaboration for Engineering.

10. Navigate to **Distribution** tab and select the required recipient details.

    If you do not find the required recipient details, select the transmittal and click the **More actions** button ••• on the **Inline Action Bar** and then click **Lifecycle > Prepare Distribution List**. In the **Prepare Distribution List** dialog box, select the required type, company, group, name, email and delivery.

11. Click **Submit**.

12. In the Document list, select the transmittal and click the **More actions** button ••• on the **Inline Action Bar** and click **Lifecycle > Send**.

    The general transmittal is sent to the OpenText Core Collaboration for Engineering and the status changes to **Queued**.

Note: Here, we have added `ao_doc_coordinator` to `ao_tr_controllers` role so they can also create Transmittal.

16.5 Create a project supplier document schedule in active projects

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Navigate to **Active Projects><Facility>**.
3. In the Active Projects folder, navigate to a project folder, click the **Add item** button +, and then click **Add file**.

Note: You must select the required project folder to create a Project Supplier Document Schedule.

4. In the **Create type** dialog box, select **Project Supplier Document Schedule** for category.

5. Select **Project Supplier Document Schedule** as the AO Document Type.
6. In **Edit properties** dialog box, type the name of the project supplier document schedule.
7. Select the PO number.
8. Select the OpenText Core Collaboration for Engineering site name.
9. In the **Classification** area, enter the Project Title and Supplier Name
10. In other areas, enter all the required information.
11. Click **Continue**.

16.6 Attach project documents to supplier document schedule

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Navigate to **Active Projects><Facility>**.
3. Select a project document that is in **Placeholder** status.
4. Position the pointer over the project document and click the **More actions** button *** on the **Inline Action Bar** and click **Attach to Project Supplier Document Schedule**.
5. In **Attach Project Supplier Document Schedule Dialog**, select the **Supplier Document Schedule** for which you want to attach the Supplier Document.
6. Click **Continue**.
7. On the **Relations** page, you can view that the project document is part of Supplier Document Schedule relation.

16.7 Attach project working copy to supplier document schedule

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Navigate to **Active Projects > <Facility/Working Copy>**.
3. Select a project working copy that is in **Placeholder** status.
4. Position the pointer over the project working copy and click the **More actions** button *** on the **Inline Action Bar** and click **Attach to Project Supplier Document Schedule**.
5. In **Attach Project Supplier Document Schedule Dialog**, select the **Project Supplier Document Schedule** to which you want to attach the Project Working Copy.

6. Click **Continue**.

   On the **Relations** page, you can view that the project working copy is part of Supplier Document Schedule relation.

16.8 Share supplier document schedule with OpenText Core Collaboration for Engineering

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Navigate to **Active Projects > <Facility/Supplier Document Schedule>**.
3. Select a Supplier Document Schedule that is in **Being Prepared** status.
4. Position the pointer over the supplier document schedule and click the **More actions** button ••• on the **Inline Action Bar** and click **Share with Supplier**.

   Note: Supplier Document Schedule must have atleast one document to send to OpenText Core Collaboration for Engineering.

   The status of the Supplier Document Schedule and Document changes to **Queued** status.

   You can follow the same steps for sending a project working copy to OpenText Core Collaboration for Engineering.

16.9 Share additional documents with OpenText Core Collaboration for Engineering

1. Sign in with project controller credentials. For example, **ao_doc_coordinator**.
2. Navigate to **Active Projects > <Facility>**.
3. Position the pointer over the placeholder document and click the **More actions** button ••• on the **Inline Action Bar** and click **Attach to Project Supplier Document Schedule**.

   Note: Supplier Document Schedule must have atleast one document to send to OpenText Core Collaboration for Engineering.

4. In the **Attach Project Supplier Document Schedule Dialog**, select the project supplier document schedule that already contains project documents.
5. Click **Continue**.