## Preparation:

* Create a new project based on the default template with Edgar
* Add Cindy as Project Admin
* Have a folder with some documents ready for upload. GTW » Requirements Management
* Connect Document Tracker to Customer Requirement via a new custom field.

## Navigation

* Create new Folder
* Upload Document: Medical Requirements.
* Make a change in the document, and upload again. Version. Revision increases by every version and it goes 1.0 as the document gets approved.
* Mass Upload all Requirements Management documents.
* Move Documents
* Sort. Use metadata for filtering and grouping. Confidentiality level.
* Download
* Export multiple documents as zip

## Lock Document

* Lock a document. Change status to locked.
* Log in with Cindy, try to change confidentiality level
* Unlock by changing it back to “Draft”
* Try again. Now it works!

## Administration and Configuration

* Review Project Members and Roles
* Go to Configuration
* Review Permissions. Emphasize who can do what.
* Review State Transitions. Workflow Capabilities

## Approval Process

* Send a document for approval. Reviewer: Cindy. Moderator: Edgar.
* Log in as Cindy. Sign and approve.
* Log back as Edgar. Finish the review, set status to approved.

## Documents and Requirements

*Convert documents to requirements or vice versa.*

* Create new Customer Requirement CR1
* Add a new Document (reference)
* Go to a documents. Add an association to CR1

// Go to Document Tracker. Configure: add new choice field. Does not have to be demostrated.

* Add new reference from document to CR1
* Go to CR1. Add a downstream reference to document.
* Send a document to a Requirement Tracker. Use Medical Safety document as an example.
* Select one requirement.
* Export selection to office.
* Store the document in the document tracker instead of download.

*Use case in MSE: requirement goes into a design history file, it goes through document management lifecycle till it reaches the status approved and signed.*