Standard Operating Procedure (SOP), Enovia

2021x SOP-21 Rev AA / Using Workspaces-known as Bookmarks

Revision	Issued	Reason for issue	Author	Approver
AA	11/18/21	Enovia 2016x to 2021x Upgrade	Mahesh Meeshi	IreneOftedal Hanasand

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EMERSON

1 PURPOSE

The procedure describes creating Bookmarks, giving other users access to Bookmarks and adding content to Bookmarks.

2 RESPONSIBILITIES

- The creator of a Bookmark is responsible for adding the appropriate users and setting up the initial content of the Bookmark.
- Users with add access or greater are responsible for adding relevant content to the Bookmark.

# 3 WORKFLOW DESCRIPTION / PROCESS STEPS

Bookmarks are used to limit access to documents. There are 2 lifecycle states: Draft and In Work;
- Draft does not restrict content
- In Work restricts content

Only user with Bookmark view access, or greater, will be able to view the files for documents in a Bookmark 3.1.1.

3.1 Create Bookmark

To create a Bookmark go to Actions > Team > Create Bookmark Root.
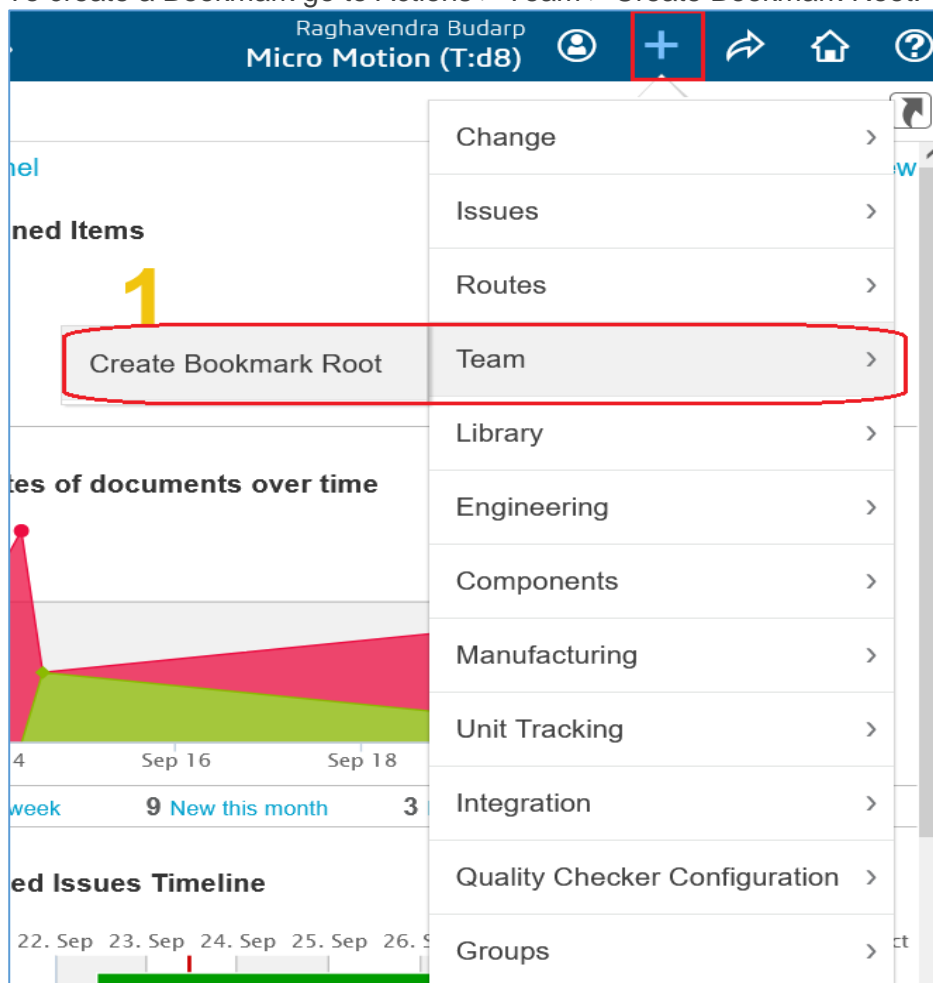
In the Create New Bookmark window enter a Name and Description. Click done at the bottom of the window.

To add users to the Bookmark go to Multiple Ownership Access then click on the Add Member icon.

In the search results select the users to add and click Submit. The user will be added with Basic access.

To remove a user, check the box next to the name of the user and click Remove. The user will be removed from the group.

3.1.1 Bookmark access
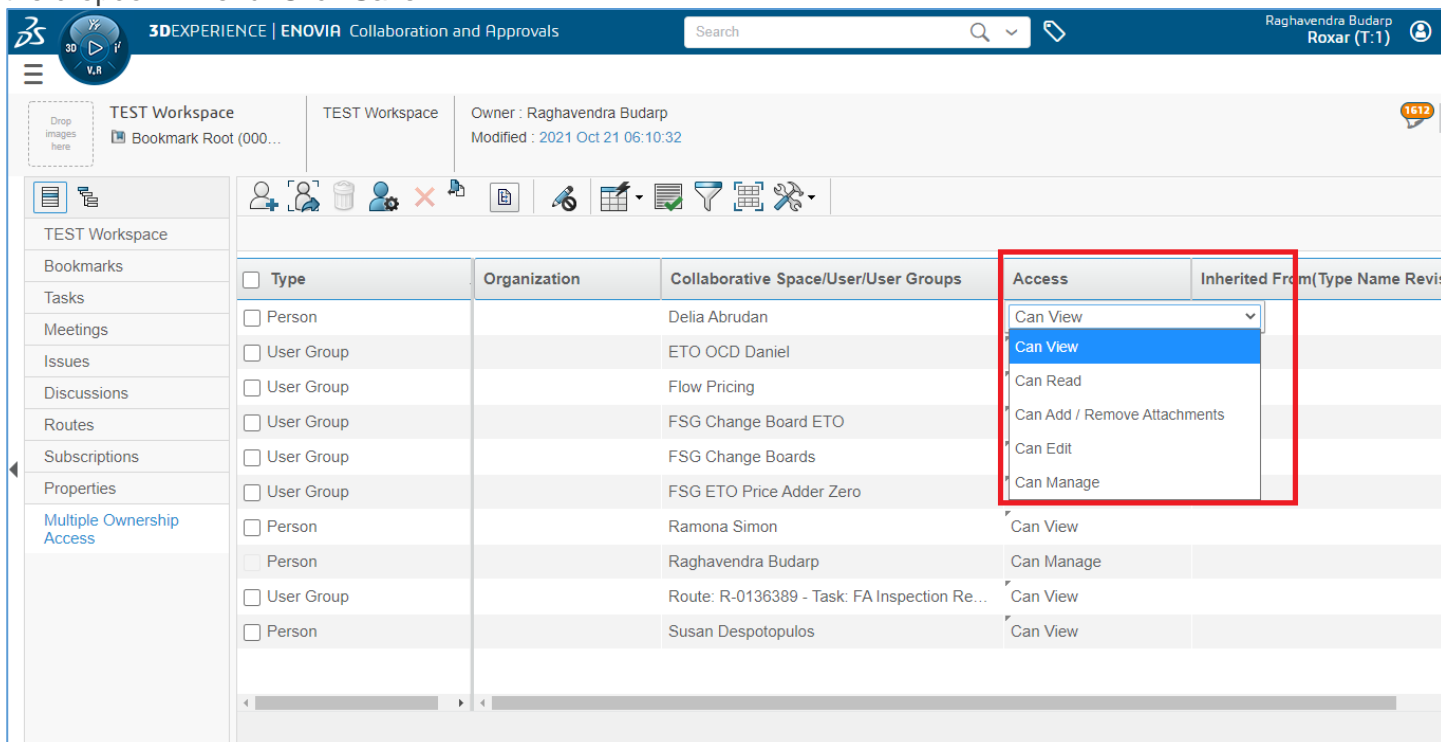
To change the access for a user or group click the Pencil icon. In the edit screen select the access from the dropdown menu. Click Save.

Access overview:

	Can see bookmark from homepage	Can see bookmark from spec	Spec Viewer Access	Spec Download Access	Add/Remove content in bookmark	Access to Files location in spec	Add/Remove Members in bookmark	Set Access level of members in bookmark
No Access								
Can View	x	x	x					
Can Read	x	x	x	x				
Cann add/remove attachements	x	x	x	x	x			
Can Edit	x	x	x	x	x	x		
Can Manage	x	x	x	x	x	x	x	x

3.2 Create Bookmark folders and add content

Bookmark content is put into folders. The Bookmark originator or users with Full access can create folders. To create a folder go to Folders then go to Actions > Create New.
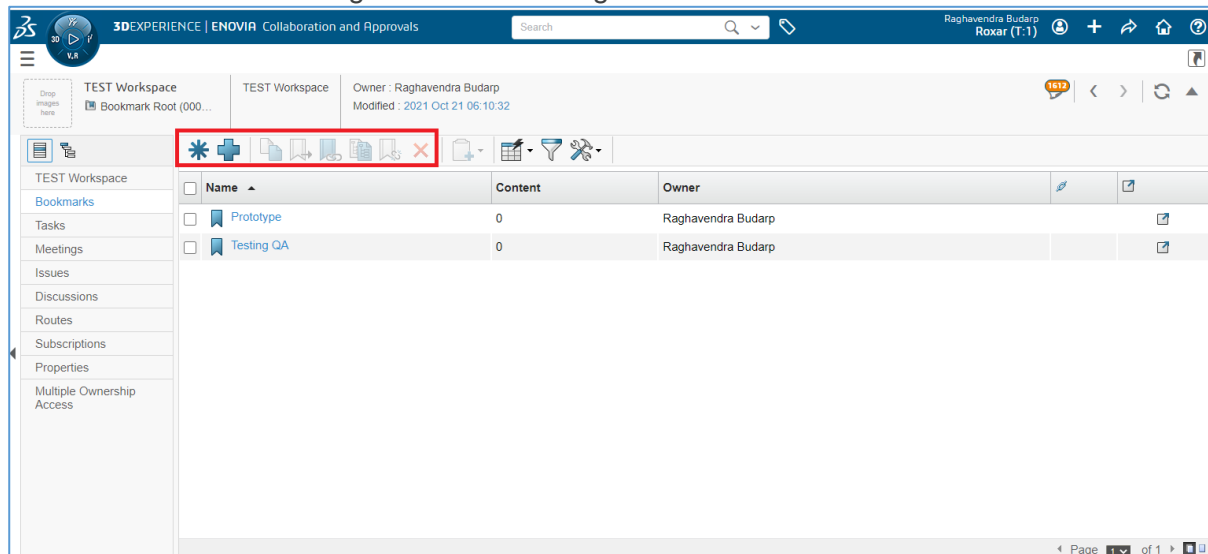
Enter a Name and Description. Leave Inherit Access set to Yes. Click Done

To add content to a folder go to Actions > Add Existing. Search for documents to be added, select them in the results and click Submit.

Actions > Create New > Document will create a document that is specifically for Bookmarks, with a DOC prefix. This type of document cannot be use as specification or reference document and is not ECO controlled.
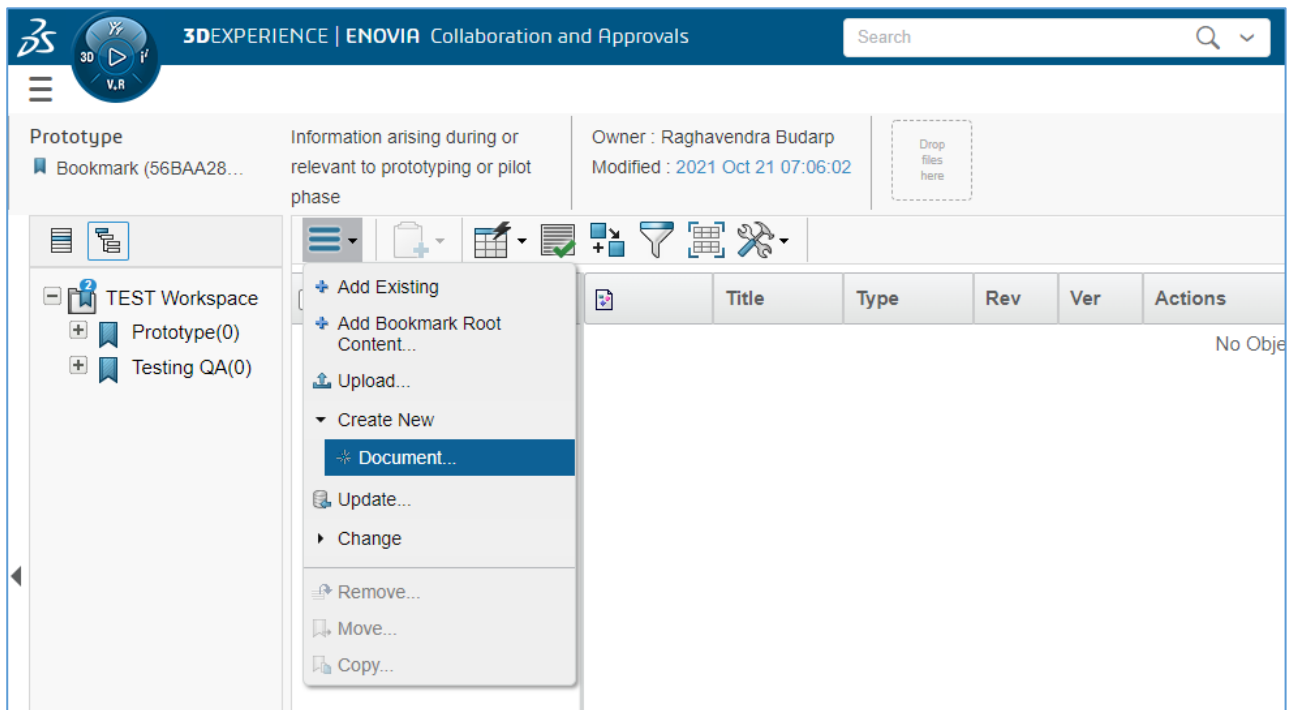
3.2.1 Bookmark folder access

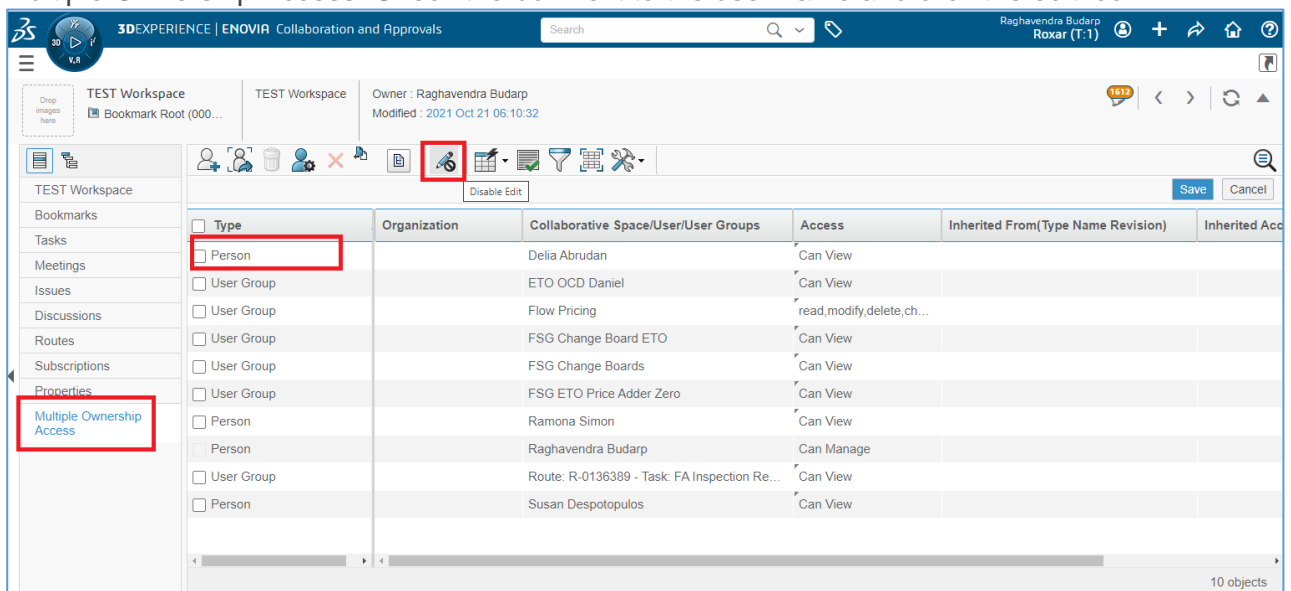User access to the folder is inherited from the Bookmark. To change the user's folder access go to Multiple Ownership Access. Check the box next to the user name and click the edit icon.

Select the level of access for the user. Click Save.

4 FLOW CHART

N/A

5 RELATED DOCUMENTS

	Document name	Doc. Reference No.
[1]		
[2]		
[3]		
[4]		