

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	IreneOfstedal Hanasand

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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

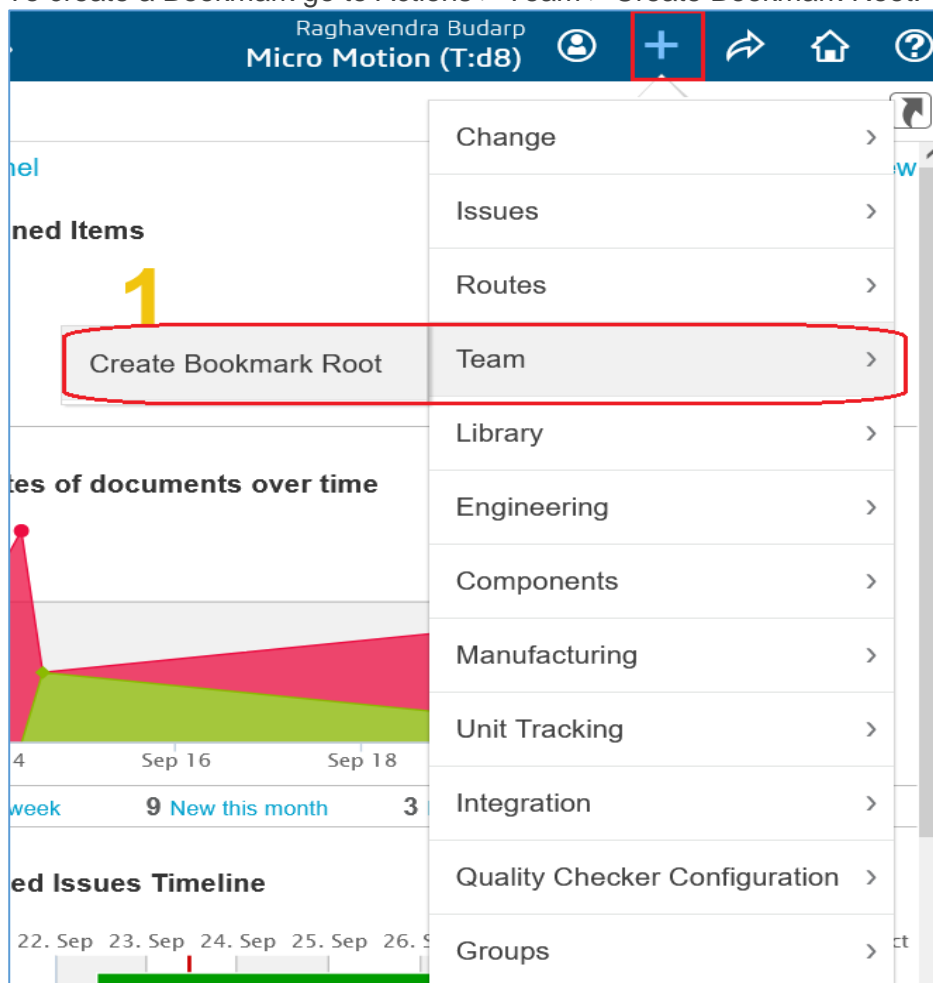
Bookmarks are used to limit access to documents. There are 2 lifecycle states: Draft and In Work;

- 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.

Create New Bookmark Root |

Fields in red italics are required

Type: Bookmark Root

Name: TEST Workspace

Bookmark Root Template: ... [Clear](#)

Description: TEST Workspace

OK Cancel

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

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TEST Workspace | TEST Workspace | Owner: Raghavendra Budarp | Modified: 2021 Oct 21 06:10:32

Multiple Ownership Access

Type	Organization	Collaborative Space/User/User Groups	Access	Inherited From(Type Name Revision)	Inherited Ac
<input type="checkbox"/> Person		Delia Abrudan	Can View		
<input type="checkbox"/> User Group		ETO OCD Daniel	Can View		
<input type="checkbox"/> User Group		Flow Pricing	read,modify,delete,che...		
<input type="checkbox"/> User Group		FSG Change Board ETO	Can View		
<input type="checkbox"/> User Group		FSG Change Boards	Can View		
<input type="checkbox"/> User Group		FSG ETO Price Adder Zero	Can View		
<input type="checkbox"/> Person		Ramona Simon	Can View		
<input type="checkbox"/> Person		Raghavendra Budarp	Can Manage		
<input type="checkbox"/> User Group		Route: R-0136389 - Task: FA Inspection Re...	Can View		
<input type="checkbox"/> Person		Susan Despotopoulos	Can View		

10 objects

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

3DSearch - Search Results

1859 Results

	Full Name	Name	Email Address	Phone Number
1	Susan Despot...	sdespotopulos	Susan.Despotopulos...	303 530-8131
2	Delia Abrudan	Delia_Abrudan	Delia.Abrudan@Eme...	
3	Ramona Simon	Ramona_Simon	Ramona.Simon@Em...	
4	Alisha Dhond	Alisha.Dhond	Alisha.Dhond@Eme...	Unknown
5	Calin Comanci	Calin_Comanci	Calin.Comanci@Em...	+40749154578
6	Ioana Constantin	Ioana_Constantin	Ioana.Constantin@E...	
7	Alexandra Stoian	maria_marian	amarian@emerson.c...	
8	Priyanka Bhagat	Priyanka.Bhagat	Priyanka.Bhagat@E...	
9	Lavinia Ballok	Lavinia_Ballok	Lavinia.Ballok@Eme...	
10	Loredana Drule	Loredana_Drule	Loredana.Drule@Em...	
11	Emily Zhou	Ping.Zhou	Emily.Zhou@Emerso...	Unknown
12	Matthew Busby	mabusby	Matthew.Busby@Em...	
13	Jason Wasson	jasowas	Jason.Wasson@em...	Unknown
14	Michael Ackiam	E1257920	Michael.Ackiam@E...	
15	Ray Stengl	rstengl	Ray.Stengl@emerso...	303 581-1964
16	Irene Oftedal ...	ireneoh	IreneOftedal.Hanasa...	Unknown
17	Admin Platform	admin_platform	admin_platform@em...	
..	Karen-Torunn ...	karenth	Karen-Torunn.Haarr...	

OK Cancel

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TEST Workspace

Owner: Raghavendra Budarp

Modified: 2021 Oct 21 05:10:32

Type	Organization	Collaborative Space/User/User Groups	Access	Inherited From (Type Name Revision)	Inherited Ac
Person		Delia Abrudan	Can View		
User Group		ETO OCD Daniel	Can View		
User Group		Flow Pricing	read,modify,delete,che...		
User Group		FSG Change Board ETO	Can View		
User Group		FSG Change Boards	Can View		
User Group		FSG ETO Price Adder Zero	Can View		
Person		Ramona Simon	Can View		
Person		Raghavendra Budarp	Can Manage		
User Group		Route: R-0136389 - Task: FA Inspection Re...	Can View		
Person		Susan Despotopulos	Can View		

10 objects

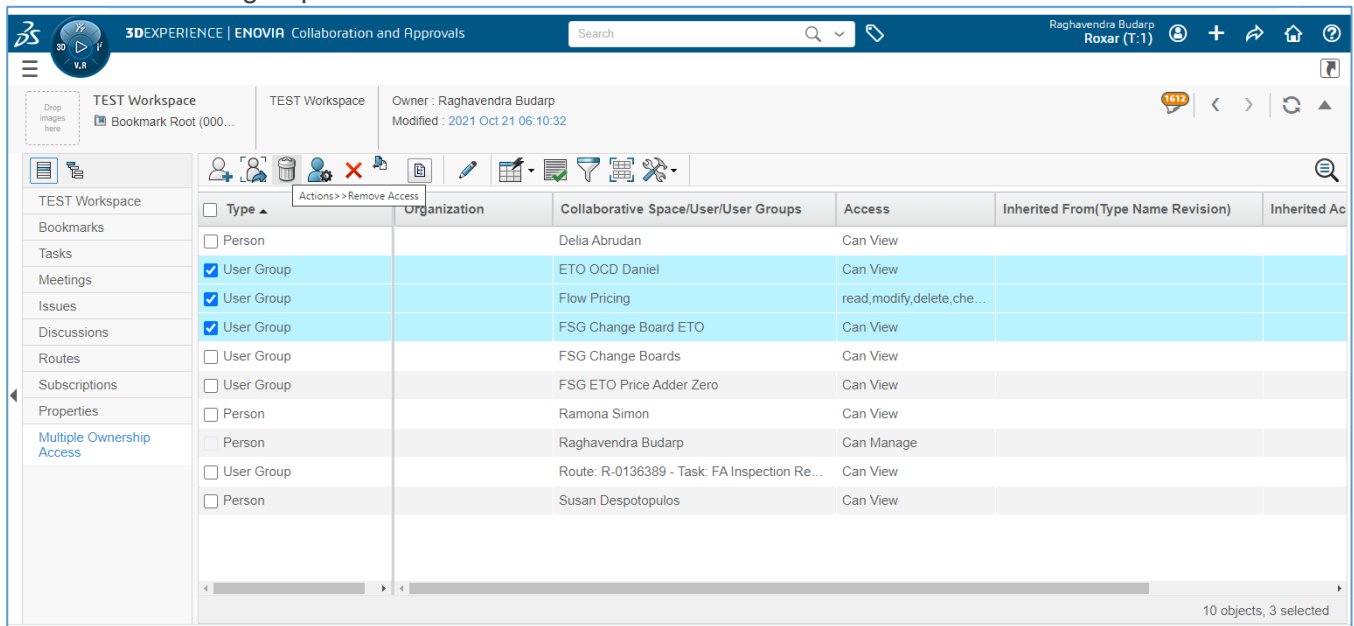
Person.txt

Show all

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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.



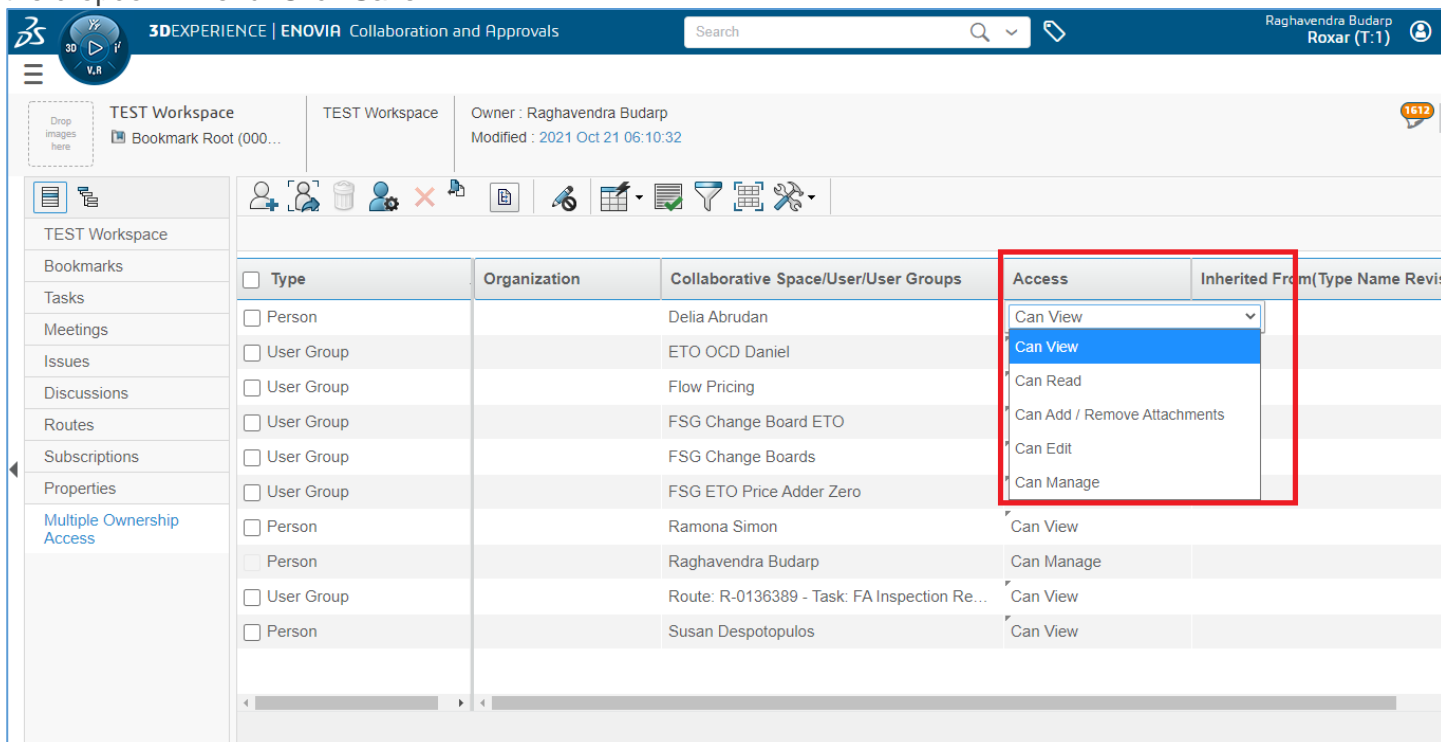
TEST Workspace | TEST Workspace | Owner : Raghavendra Budarp | Modified : 2021 Oct 21 06:10:32

Type	Organization	Collaborative Space/User/User Groups	Access	Inherited From(Type Name Revision)	Inherited Ac
<input type="checkbox"/> Person		Delia Abrudan	Can View		
<input checked="" type="checkbox"/> User Group		ETO OCD Daniel	Can View		
<input checked="" type="checkbox"/> User Group		Flow Pricing	read,modify,delete,che...		
<input checked="" type="checkbox"/> User Group		FSG Change Board ETO	Can View		
<input type="checkbox"/> User Group		FSG Change Boards	Can View		
<input type="checkbox"/> User Group		FSG ETO Price Adder Zero	Can View		
<input type="checkbox"/> Person		Ramona Simon	Can View		
<input type="checkbox"/> Person		Raghavendra Budarp	Can Manage		
<input type="checkbox"/> User Group		Route: R-0136389 - Task: FA Inspection Re...	Can View		
<input type="checkbox"/> Person		Susan Despotopulos	Can View		

10 objects, 3 selected

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.



TEST Workspace | TEST Workspace | Owner : Raghavendra Budarp | Modified : 2021 Oct 21 06:10:32

Type	Organization	Collaborative Space/User/User Groups	Access	Inherited From(Type Name Revision)
<input type="checkbox"/> Person		Delia Abrudan	Can View	
<input type="checkbox"/> User Group		ETO OCD Daniel	Can View	
<input type="checkbox"/> User Group		Flow Pricing	Can Read	
<input type="checkbox"/> User Group		FSG Change Board ETO	Can Add / Remove Attachments	
<input type="checkbox"/> User Group		FSG Change Boards	Can Edit	
<input type="checkbox"/> User Group		FSG ETO Price Adder Zero	Can Manage	
<input type="checkbox"/> Person		Ramona Simon	Can View	
<input type="checkbox"/> Person		Raghavendra Budarp	Can Manage	
<input type="checkbox"/> User Group		Route: R-0136389 - Task: FA Inspection Re...	Can View	
<input type="checkbox"/> Person		Susan Despotopulos	Can View	

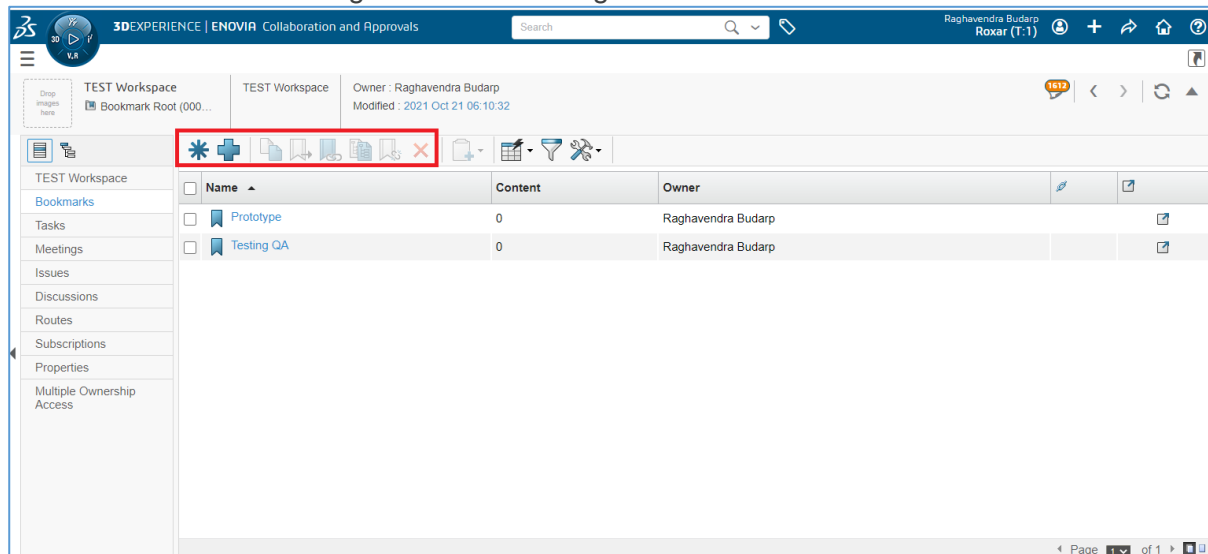
Access overview:

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

	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				
Can add/remove attachments	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

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TEST Workspace|Create New B...



Fields in red italics are required

Type
Bookmark

Name
 ... [Clear](#)

Description

Inherit Access
☒ Yes
☐ No

Publish On Connect

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.

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Search

Raghavendra Budarp
Roxar (T-1)

Prototype
Bookmark (56BAA28...

Information arising during or relevant to prototyping or pilot phase

Owner : Raghavendra Budarp
Modified : 2021 Oct 21 07:06:02

Drop files here

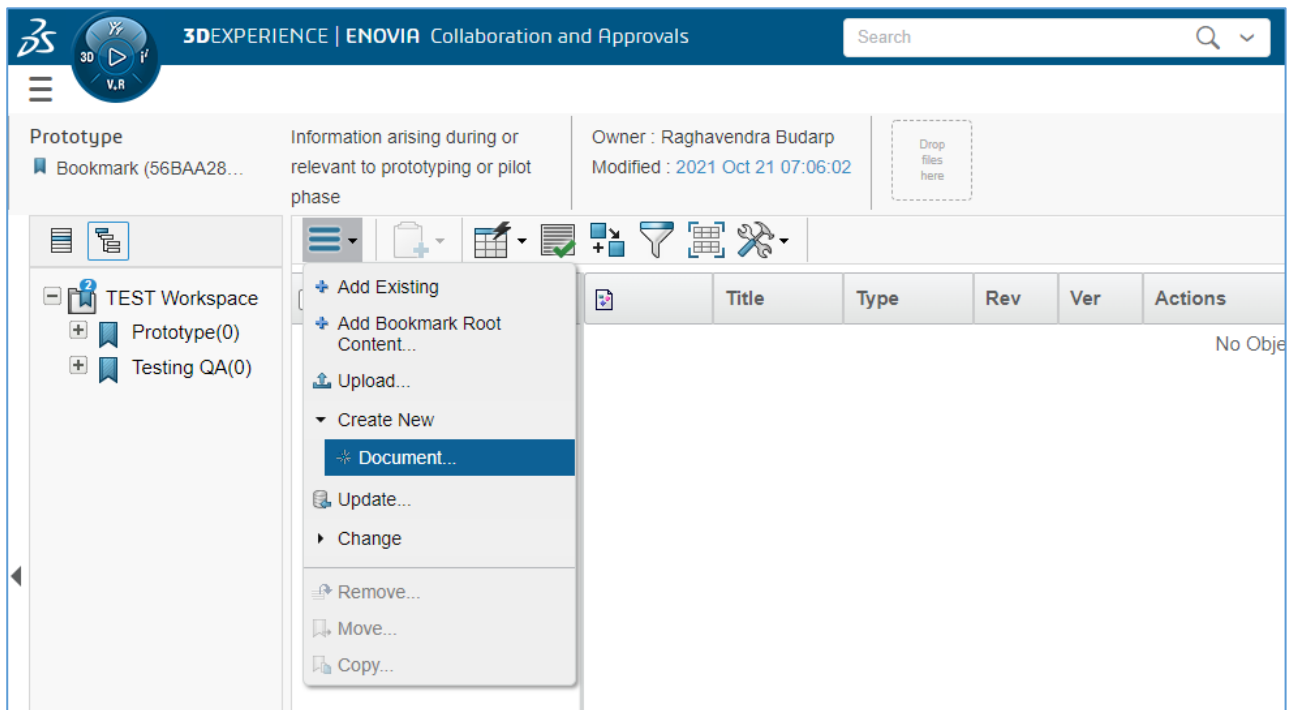
TEST Workspace
+ Prototype(0)
+ Testing QA(0)

+ Add Existing
+ Add Bookmark Root Content...
Upload...
Create New
Update...
Change
Remove...
Move...
Copy...

Title	Type	Rev	Ver	Actions	Description	State
No Objects Found						

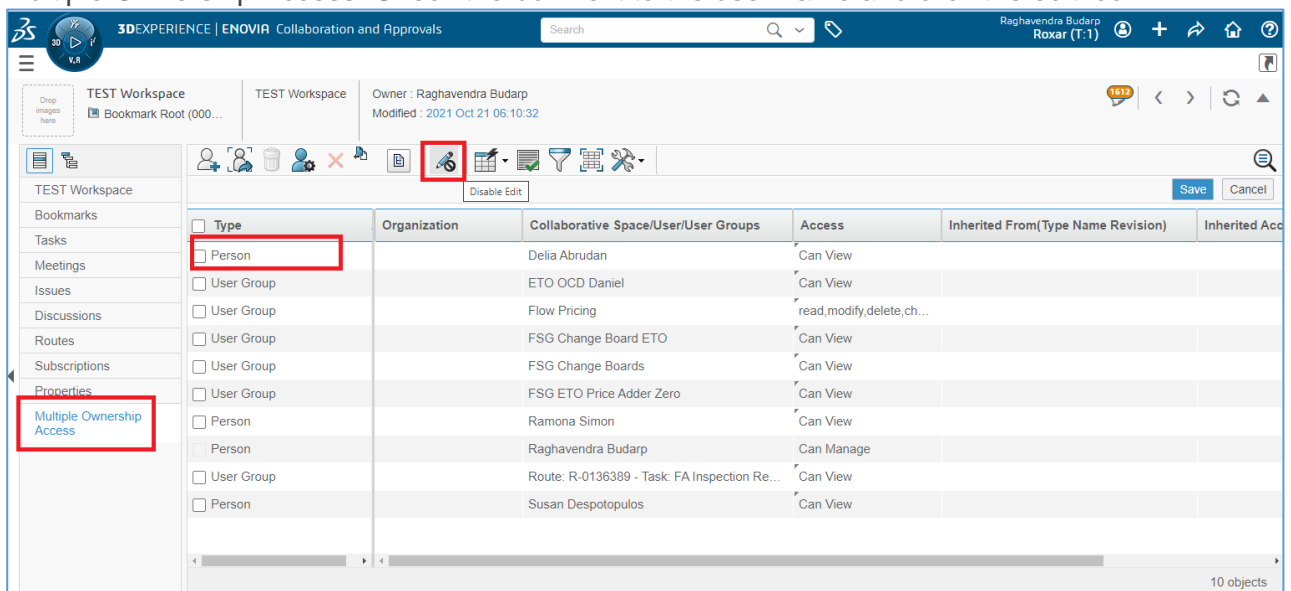
Filter Latest Revision

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]		