

Section 16

Create a New Document Template

[Creating a Blueprint](#)

[Creating a Template Object](#)

[Versioning Up a Template](#)

[Download and View from the Template](#)

[Template Version Number click behavior](#)

[Image Carousel Viewer](#)

[Image Viewer Page](#)

[Thumbnail Viewer Behavior](#)

[Multi-Select Download](#)



A *Template* is an object record in the system that is searchable by a user. It is related to a specific category. A template has its own metadata.

Click *Create New Record* to open the category list.

Drag a column and drop it here to group by that column

<input type="checkbox"/>	Type	Lock	Menu	Record ID	Internal ID	Category	Author Activity	Workflow	
<input type="checkbox"/>				2924338	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	Controlled	0.2.0.0	Aero Report	1	0	0	0	0
<input type="checkbox"/>				2924336	AREP-0000012	WhereUsedResultSet	In Work	Controlled	0.1.0.0	Aero Report	1	0 of 3	0	0	0
<input type="checkbox"/>				2924333	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	Controlled	1.1.0.0	3D CADD C/S/A	1	0 of 1	0	1	2
<input type="checkbox"/>				2924310	DWG-PROC-0000003	Block Flow Diagram (BFD) - COPY	In Work	Controlled	0.1.0.0	Block Flow Diagram	1	0	0	0	0
<input type="checkbox"/>				2924311	AREP-0000007	WhereUsedResultSet - COPY(2)	Merged	Controlled	0.1.0.0	Aero Report	1	0	0	0	0
<input type="checkbox"/>				2924275	AREP-0000005	WhereUsedResultSet	Merged	Controlled	0.1.0.0	Aero Report	1	1 of 3	0	0	0
<input type="checkbox"/>				2924273	3DM-CSA-0000003	3D CADD C/S/A Model	Released	Controlled	1.0.0.0	3D CADD C/S/A	1	0 of 1	0	1	0
<input type="checkbox"/>				2924268	DWG-PROC-0000001	Block Flow Diagram (BFD)	In Work	Controlled	0.1.0.0	Block Flow Diagram	1	1 of 1	0	1	0

Favorites

C

Create a Blueprint

Grid Layout: Favorites



Export



New

Upload

Favorites

Show files in subfolders

Drag a column and drop it here to group by that column

	Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle State	Status	Version	Category	Author Activity	Workflow	Subfiles	Where Used	Tree	Chatter F
<input type="checkbox"/>				2924338	AREP-0000002											
<input type="checkbox"/>				2924336	AREP-0000012							0 of 3	0	0	0	0
<input type="checkbox"/>				2924333	3DM-CSA-00000							0 of 1	0	1	2	0
<input type="checkbox"/>				2924310	DWG-PROC-000											0
<input type="checkbox"/>				2924311	AREP-0000007											0
<input type="checkbox"/>				2924275	AREP-0000005											0
<input type="checkbox"/>				2924273	3DM-CSA-00000							0 of 1	0	1	0	0
<input type="checkbox"/>				2924268	DWG-PROC-000							1 of 1	0	1	0	0

Create New

Choose a category(or template) from the list below and click on 'Create'

Category List

Template List

i

All

Search for Category or Template

AATF	AFM/AOI Approval Tracking Form	(1)Template	
ACF	AOP Change Form	(0)Template	
ACF (AV)	AOP Change Form (AV)	(1)Template	
ACN	Advance Change Notice	(0)Template	
AD	Airworthiness Directive	(0)Template	
ADP	Abbreviated Disposal Plan	(1)Template	
ADP (AV)	Abbreviated Disposal Plan (AV)	(1)Template	
AECP	Aerospace Engineering Change Proposal	(1)Template	

Title: Enter Title

Create

Cancel

Select the category you would like to create a Template for.

Click Create to proceed.

Go to page:

1

Show rows:

20

1-8 of 8





Properties

Save

Cancel

Lifecycle : In Work ▾



Status : Controlled ▾

Change Info :



Title :

Modified :

RID :

Category : Report (PROD)

Version :

Size :

Properties

UNQ

Internal Identifier

External Identifier

Thread ID

Record ID

Document Type



- File
- Hyperlink
- Physical Media
- None

4

OK

Override Value

General Info

Title

Category

Notes

Description

Created By

Modified By

Release Date



Change Information

Change Category

Override Value

Click OK to proceed.



Click Save.

5

Save

Lifecycle **In Work** ▾

Status

Draft ▾

Change Info*

Rev 0



Title : AOP Change Form Template

RID :

Category : Version :

Size : 104.38 KB

Modified :

Properties



Details

Primary Identifier*

Override Number

Secondary Identifier

Title* ⚠

AOP Change Form Template

Description

Blueprint ✕

Category

ACF

Change Category

Author*

M

Clear

Publisher*

M

Clear

OPI

Clear

Notes

Enter required information on the *Properties* page.

Click *Set as Template* to create a template record.



Set as Template

Save

Cancel

Action



PV-18-0027-ACF

Lifecycle **In Work** ▾Status **Draft** ▾Change Info* **Rev 0**

Title : AOP Change Form Template



RID : 2512571 Category : ACF

Version : [0.1.0.0](#)

Size : 99.29 KB

Modified : 02/03/2018 [Jane S](#)

Properties

Details

Primary Identifier* PV-18-0027-ACF

Override Number

Secondary Identifier

Title * ⚠️ AOP Change Form Template

Description Blueprint

Category ACF

Author * Mar

Publisher * Mar

OPI

Notes

Blueprint has been created.

Blueprint is an object within the system that is not searchable. It is specific to a category. When you create a new object based on a template, the blueprint is used to preload the object's values.

Change Category

Clear

Clear

Clear

Set as Template

Save

Cancel

Action

PV-18-0027-ACF

Lifecycle In Work

Status Draft

Change Info* Rev 0



Title : AOP Change Form Template



RID : 2512571

Category : ACF

Version : [0.1.0.0](#)

Size : 99.29 KB

Modified : 02/03/2018

[Jane S](#)

Properties

Details

Primary Identifier*

PV

Secondary Identifier

Title* ⚠

AC

Description

Blueprint

Category

ACF

Author*

Marshall Aerospace Canada Inc.

Publisher*

Marshall Aerospace Canada Inc.

OPI

Notes

Template Information



Template Title AOP Change Form Template

Description AOP Change Form

7

Save

Cancel

Enter Template information
and click Save.

Override Number

Change Category

Clear

Clear

Clear

Lifecycle In Work Canceled Released Status Draft Title: AOP Change Form Te RID: 2512572 Category: Template Version: 0.1.0.0

Note: After creating a Template, it should be set to Released Lifecycle state in order to see it in the create new from Template List tab. 1. From the Lifecycle pick list select Released. 2. Click Save. 3. Releasing the Template record will release the blueprint record as well.

Template object will display the icon of blueprint file. You will be able to Download and View blueprint file directly from the Template by clicking on Version number of the Template. The Version number click behaviour will be determined by permission settings. Note: Template object will display its own icon in the following cases: if Template object doesn't have a blueprint attached, or attached blueprint doesn't have a file.

Category Template Notes AOP Change Form Object of Template category has been created. Blueprint object has been attached. Mountain Standard Time(GMT-07:00)

You can delink the blueprint by clicking the D-Link button. This button will be disabled for the Released Template. If you mistakenly define a template for category A but wanted it for category B – just click on the Upload button and select the proper category. By saving it, a new blueprint record will be attached to the Template. You can also search for the existing record to attach it as a blueprint. By saving it, a new blueprint record will be attached to the Template. A blueprint record is not searchable.

Drag a column and drop it here to group by that column

Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle State	Status	Version	Category	Author Activity	Workflow	Subfiles	Where Used	Tree	Chatter F
			2924338	AREP-0000012								0	0	0	0
			2924336	AREP-0000012								0 of 3	0	0	0
			2924333	3DM-CSA-00000											
			2924310	DWG-PROC-000											
			2924311	AREP-0000007											
			2924275	AREP-0000005											
			2924273	3DM-CSA-00000											
			2924268	DWG-PROC-000											

Create New ✕

Choose a category(or template) from the list below and click on 'Create'

Category List
Template List
All

AATF	AFM/AOI Approval Tracking Form	(1)Template	
ACF	AOP Change Form	(1)Template	
ACF (AV)	AOP Change Form (AV)	(1)Template	
ACN	Advance Change Notice	(0)Template	
AD	Airworthiness Directive	(0)Template	
ADP	Abbreviated Disposal Plan	(1)Template	
ADP (AV)	Abbreviated Disposal Plan (AV)	(1)Template	
AECP	Aerospace Engineering Change Proposal	(1)Template	

Title:

Create Cancel

Note:
 After Template has been Released, template quantity on the *Category List* tab has been updated and you will see this Template in the *Template List* tab.

Properties

Versioning Up a Template

Save

Correction Mode

Cancel

Action

TS-600-30-02-A

Lifecycle : Released

Status : Controlled

Change Info : Rev 0



Title : SPECIAL INSPECTION REVIEW FORM

RID : 2355864 Category : Template

Properties

Blueprint Information

Record Identifier & Title

2355863

Details

Record Identifier 2355864

Primary Identifier* TS-600-30-02-A

Secondary Identifier

Change Information*

Version 1.0.0.0

Title* SPECIAL INSPECTION REVIEW FORM

Description

Category Template

Notes

Existing Template that is already Released can be versioned up.

This will automatically version up the corresponding blueprint and link it to the versioned up template.

The blueprint record is not searchable.



Activity



Dashboard



Discussion



Security



Supp Items



Tree



Vers Hist



Vers Up



Where



Workflow

How to:

1. Lock the Template.
2. From the option Menu select Version Up.

Note:

Versioning up a template will inherit the master file by default.

Properties

3. The Template and blueprint records have been versioned up.

Correction Mode

Cancel

Action

TS-600-30-02-A

Lifecycle : In Work ▾

Status : Controlled ▾

Change Info : Rev 0



Title : SPECIAL INSPECTION REVIEW FORM



RID : 2790032 Category : Template

Version : [1.1.0.0](#)Modified : 2022/05/25 [Jane S](#)

Properties

Blueprint Information ⓘ

Record Identifier & Title

[2790033](#) ←

Blueprint Menu



Delink

Upload

Details

Record Identifier

2790032

Primary Identifier*

TS-600-30-02-A

Secondary Identifier

Change Information*

Version

1.1.0.0

Title*

SPECIAL INSPEC

Description

Category

Template

Notes

4. Click the blueprint RID hyperlink or select the *Properties* option from the *Blueprint Menu* to open the blueprint record. You can modify it now.

5. After the blueprint record has been updated, the corresponding Template record should be set to Released in order to see it in the create new from *Template List* tab.

Note: By releasing a new template version, previous Template and Blueprint version will be Superseded.



Activity



Discussion



Files



Properties



Security



Supp Items



Tree



Vers Hist



Where



WorkFlow



Grid Layout: Search



Highlight Text

Save Query

Export



2355864

Download and View from the Template

2355864 (Criteria =Version Equal To All Versions)

Total Records Returned : 250

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Menu	Lock	T. ▾	Reco... ▾	Primary Identifi... ▾	Title ▾	Ver... ▾	Lifecycle State... ▾	Category ▾	Change Informati... ▾	Size ▾
<input type="checkbox"/>				2790032	TS-600-30-02-A	SPECIAL INSPECTION REVIEW FORM	1.1.0.0	In Work	Template	Rev 0	126.49 KB
<input type="checkbox"/>				2355864	TS-600-30-02-A	SPECIAL INSPECTION REVIEW FORM	1.0.0.0	Released	Template	Rev 0	126.49 KB



- The Template record does not have its file and uses a Blueprint file to download and view.
- For the Template records, left-click and right-click menu security will be of the Template category and not Blueprint.
- If the Template record does not have security to download and view but the blueprint record has, then these options will not work for the Template record.
- If the Template record has security to download and view, the [Version number click behavior](#) will be as per the user's config in My Settings.

Select the Template records and click the View All Selected in Carousel icon. Image Carousel page will open in a new tab.

Template Version Number click behavior

2355864 x 2355864 (Criteria Total Records Returned : 250

Drag a column header and drop it here to group by that column

✓	Menu	Lock	T. ▾	Reco... ▾	Primary Identifi... ▾	Title	Category ▾	Change Informati... ▾	Size ▾	
✓	✉	🔒	📄	2790032	TS-600-30-02-A	SPECIAL INSPECTION REVIEW FORM 1.1.0.0	In Work	Template	Rev 0	126.49 KB
✓	✉	🔒	📄	2355864	TS-600-30-02-A	SPECIAL INSPECTION REVIEW FORM 1.0.0.0	Released	Template	Rev 0	126.49 KB



Click the Version Number:
• Left-click on any version link will result in View or Download as per the user's config in My Settings.
• Right-click on any version link results in a dropdown list with a viewable file available to download or view.

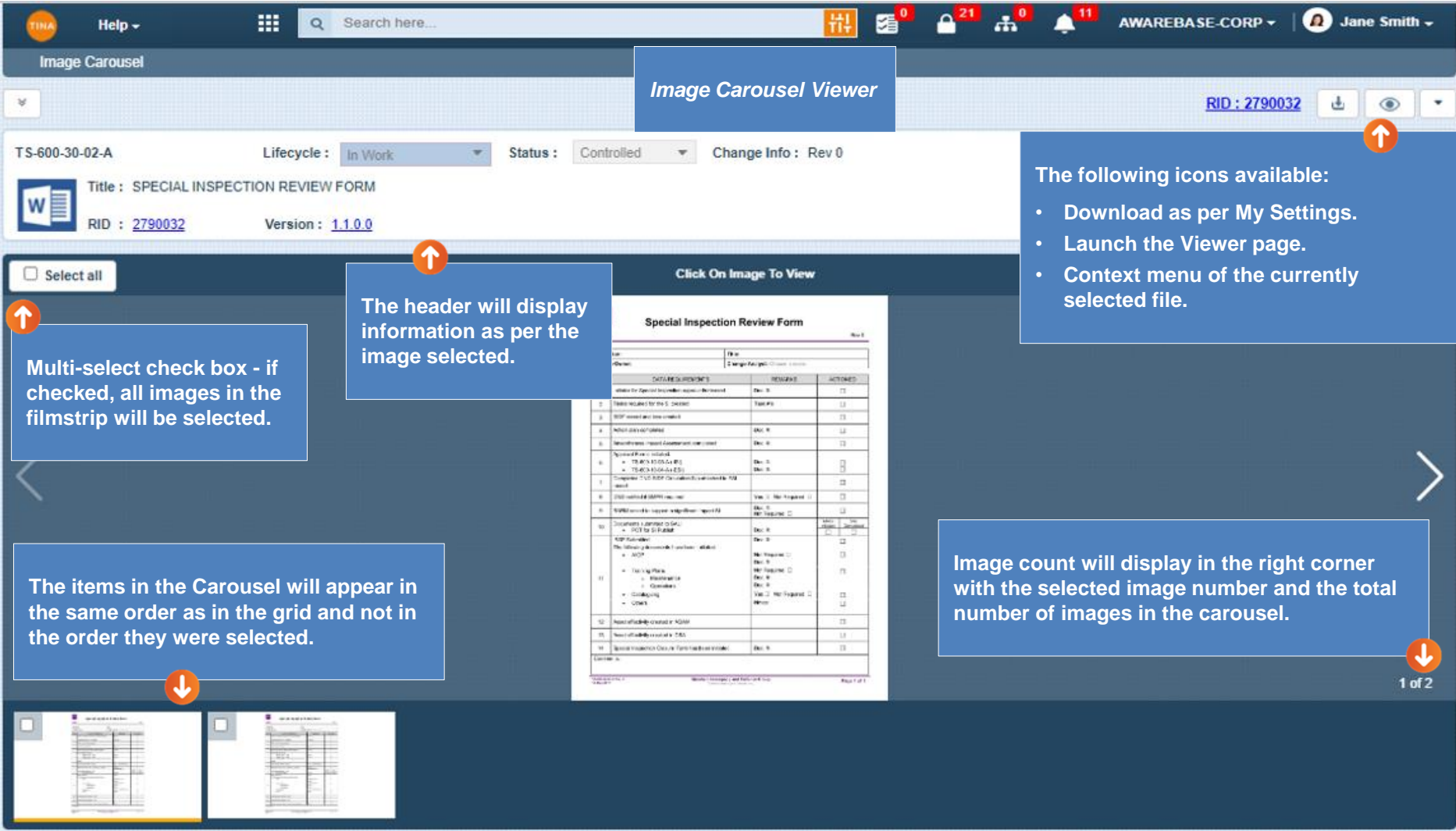


Image Carousel Viewer

RID : [2790032](#)   

TS-600-30-02-A Lifecycle : **In Work** Status : **Controlled** Change Info : Rev 0
Title : SPECIAL INSPECTION REVIEW FORM
RID : [2790032](#) Version : [1.1.0.0](#)

Select all
Multi-select check box - if checked, all images in the filmstrip will be selected.

The header will display information as per the image selected.

The items in the Carousel will appear in the same order as in the grid and not in the order they were selected.

The following icons available:

- Download as per My Settings.
- Launch the Viewer page.
- Context menu of the currently selected file.

Image count will display in the right corner with the selected image number and the total number of images in the carousel.

Image Carousel



RID : 2790032



TS-600-30-02-A

Lifecycle : In Work ▾

Status : Controlled ▾

Change Info : Rev 0



Title : SPECIAL INSPECTION REVIEW FORM

RID : [2790032](#)Version : [1.1.0.0](#)

Modified : 2022/05/25



Records Selected: 1

Click On Image To View

The Download and Favorites icons will appear when the image(s) are selected.

- Download as per My Settings.
- When clicking on the *Star* icon will add the record to the Favorites. The *Add to Favorites* pop-up will open.

Special Inspection Review Form

ITEM	DATE/DESCRIPTION	REQ/RS	ACTIONED
1	Verify for Special Inspection approval/Document	Dec 8	<input type="checkbox"/>
2	Table Review for the S. Inspect	Jan 19	<input type="checkbox"/>
3	RFI approval/Document		<input type="checkbox"/>
4	Admin plan/Document	Dec 8	<input type="checkbox"/>
5	Inspection report/Document/Document	Dec 8	<input type="checkbox"/>
6	Approved Form released <ul style="list-style-type: none"> • TR-6131000-010 • TR-6131000-010 	Dec 8	<input type="checkbox"/>
7	Complete 1-2-2022 RFI/Document/Document/Document		<input type="checkbox"/>
8	2022 revised RFI/Document	Jan 2	<input type="checkbox"/>
9	RFI approval/Document/Document/Document	Dec 8	<input type="checkbox"/>
10	Document/Document/Document <ul style="list-style-type: none"> • 2022 RFI/Document • RFI/Document 	Dec 8	<input type="checkbox"/>
11	RFI/Document <ul style="list-style-type: none"> • The Ministry/Document/Document/Document • RFI/Document • Training Plan <ul style="list-style-type: none"> • Document/Document • Compliance <ul style="list-style-type: none"> • RFI/Document/Document • OHS/Document 	Dec 8	<input type="checkbox"/>
12	Admin plan/Document/Document		<input type="checkbox"/>
13	Inspection report/Document/Document		<input type="checkbox"/>

Click on Image to View.
The [Image Viewer](#) page will open in a new tab.

You can select multiple images through this checkbox.



Image Viewer Page

TS-600-30-02-A Lifecycle: In Work Status: Controlled Change Info: Rev 0

Title: SPECIAL INSPECTION REVIEW FORM

RID: 2790032 Version: 1.10.0 Modified: 2022/05/25

View

82% [Zoom controls]

The header will display information as per the image selected.

Special Inspection Review Form Rev 0

SI Number:	Title:
Change Owner:	Change Analyst: Choose a name

ITEM	DATA REQUIREMENTS	REMARKS	ACTIONED	
1	Initiator for Special Inspection approved/released	Doc. #:	<input type="checkbox"/>	
2	Tasks required for the SI created	Task #/s:	<input type="checkbox"/>	
3	SIDF record and tree created		<input type="checkbox"/>	
4	Action plan completed	Doc. #:	<input type="checkbox"/>	
5	Airworthiness Impact Assessment completed	Doc. #:	<input type="checkbox"/>	
6	Approval Forms initiated: <ul style="list-style-type: none"> TS-600-10-03-A (-SI) TS-600-10-04-A (-ESI) 	Doc. #: Doc. #:	<input type="checkbox"/> <input type="checkbox"/>	
7	Completed DND SIDF Circulation Slip attached to ESI record		<input type="checkbox"/>	
8	DND notified if SMPR required	Yes <input type="checkbox"/> Not Required <input type="checkbox"/>	<input type="checkbox"/>	
9	RARM raised to support a significant impact SI	Doc. #: Not Required <input type="checkbox"/>	<input type="checkbox"/>	
10	Documents submitted to SAL: <ul style="list-style-type: none"> PCT for SI Publish 	Doc. #:	IMAC Initiated <input type="checkbox"/>	SAL Completed <input type="checkbox"/>
11	ISSP Submitted The following documents have been initiated: <ul style="list-style-type: none"> AICP 	Doc. #:	<input type="checkbox"/>	
		Not Required <input type="checkbox"/> Doc. #:	<input type="checkbox"/>	
		Not Required <input type="checkbox"/> Doc. #:	<input type="checkbox"/>	

Go back to [Section 16: Create a New Document Template](#) or continue.

Thumbnail Viewer Behavior

Preview

(RID: 2355864)

Download icon | Eye icon

Ver...	Lifecycle State...	Category	Change Informati...	Size
1.1.0.0	In Work	Template	Rev 0	126.49 KB
1.0.0.0	Released	Template	Rev 0	126.49 KB

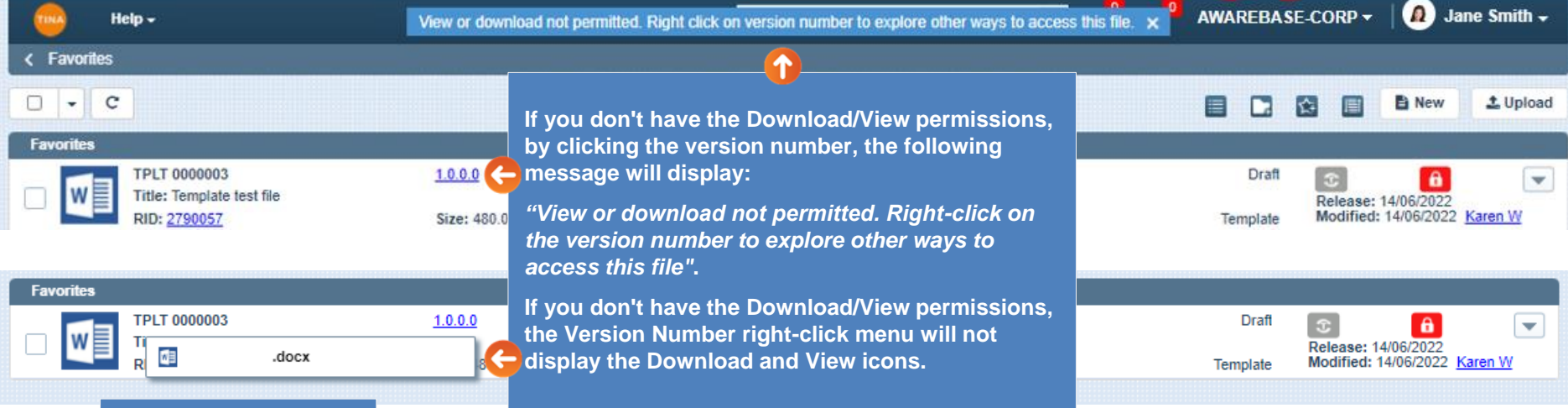
↑

In My Settings, you can specify the hover over version number behavior:

- when hovering over the version number, show a thumbnail preview of the file.

←

From the Preview window, you will be able to download the file or preview it on the Image Viewer page.

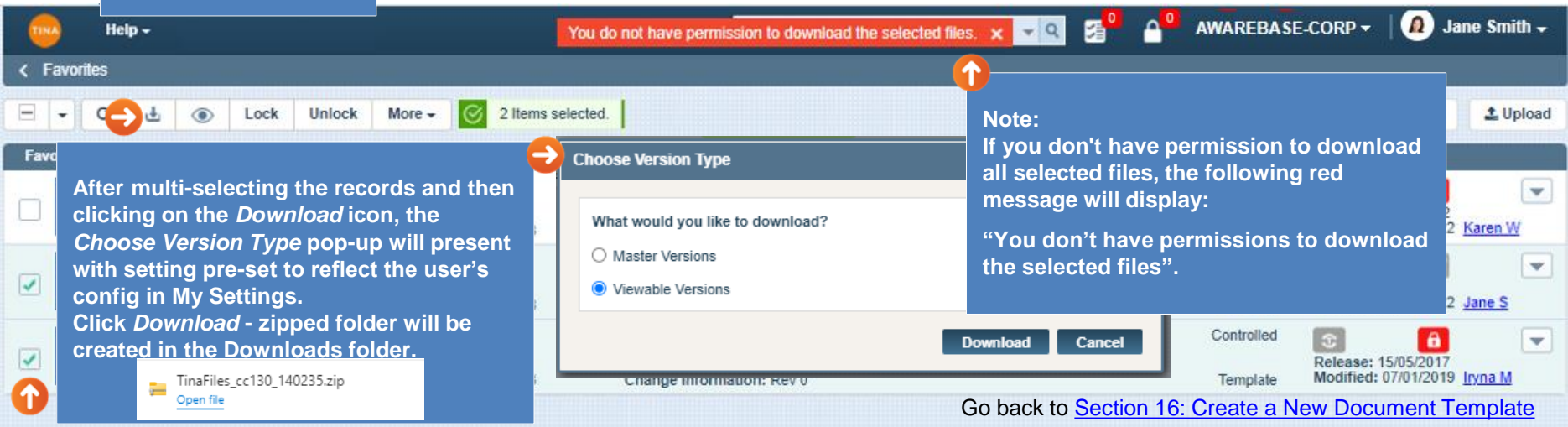


If you don't have the Download/View permissions, by clicking the version number, the following message will display:

"View or download not permitted. Right-click on the version number to explore other ways to access this file".

If you don't have the Download/View permissions, the Version Number right-click menu will not display the Download and View icons.

Multi-Select Download



After multi-selecting the records and then clicking on the *Download* icon, the *Choose Version Type* pop-up will present with setting pre-set to reflect the user's config in My Settings. Click *Download* - zipped folder will be created in the Downloads folder.

Note:
If you don't have permission to download all selected files, the following red message will display:
"You don't have permissions to download the selected files".