

Section 13

New Document (Physical Media)

[Create New Document \(Physical Media\)](#)

[Physical Media Window](#)

[Checking Out Physical Media](#)

[Checking In Physical Media](#)





If you wish to create a new record, click the *New* button.

Favorites									
<input type="checkbox"/>		TPLT-0000006 Title: Pump Station Upgrade Project RID: 2305254	1.0.0.0 Size: 0 Bytes	Archived Change Information: Rev 0					
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305245	0.5.0.0 Size: 35.75 KB	Submitted Change Information:					
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305240	0.4.0.0 Size: 35.75 KB	In Work Change Information:	Electrical Wiring Diagram	Controlled		Effective: 18/05/2017 Modified: 18/05/2017	Mike F
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305232	0.3.0.0 Size: 35.75 KB	In Work Change Information:	Electrical Wiring Diagram	Controlled		Effective: 18/05/2017 Modified: 18/05/2017	Mike F
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305177	0.1.0.0 Size: 35.75 KB	In Work Change Information: Rev 0	Electrical Wiring Diagram	Controlled		Effective: 17/05/2017 Modified: 17/05/2017	Mike F
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305179	0.2.0.0 Size: 35.75 KB	In Work Change Information: Rev 0	Electrical Wiring Diagram	Controlled		Effective: 17/05/2017 Modified: 17/05/2017	Mike F
<input type="checkbox"/>		EWD-0000019 Title: JJB-1009 JUNCTION BOX LAYOUT RID: 2305172	0.2.0.0 Size: 35.75 KB	In Work Change Information: Rev 0	Electrical Wiring Diagram	Controlled		Effective: 17/05/2017 Modified: 17/05/2017	Mike F
<input type="checkbox"/>		EWD-0000018 Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC POWER DISTRIBUTION WIRING DIAGRAM RID: 2305168	0.2.0.0 Size: 35.75 KB	In Work Change Information: Rev 0	Electrical Wiring Diagram	Controlled		Effective: 17/05/2017 Modified: 17/05/2017	Mike F



Item	Title	RID	Version	Status	Change Information	Category	Effective	Modified	Owner
<input type="checkbox"/>	TPLT-0000006	2305254	1.0.0.0	Archived	Change Information: Rev 0	Controlled	Effective: 18/05/2017	Modified: 18/05/2017	Mike F
<input type="checkbox"/>	EWD-0000020	2305245	0.5.0.0	Submitted	Change Information:	Electrical Wiring Diagram	Effective: 18/05/2017	Modified: 18/05/2017	Mike F
<input type="checkbox"/>	EWD-0000020	2305240	0.4.0.0	In Work	Change Information:	Electrical Wiring Diagram	Effective: 18/05/2017	Modified: 18/05/2017	Mike F
<input type="checkbox"/>	EWD-0000020	2305232	0.3.0.0	In Work	Change Information:	Electrical Wiring Diagram	Effective: 18/05/2017	Modified: 18/05/2017	Mike F
<input type="checkbox"/>	EWD-0000020	2305177	0.1.0.0	In Work	Change Information:	Electrical Wiring Diagram	Effective: 17/05/2017	Modified: 17/05/2017	Mike F
<input type="checkbox"/>	EWD-0000020	2305179	0.2.0.0	In Work	Change Information:	Electrical Wiring Diagram	Effective: 17/05/2017	Modified: 17/05/2017	Mike F
<input type="checkbox"/>	EWD-0000019	2305172	0.2.0.0	In Work	Change Information:	Electrical Wiring Diagram	Effective: 17/05/2017	Modified: 17/05/2017	Mike F
<input type="checkbox"/>	EWD-0000018	2305168	0.2.0.0	In Work	Change Information:	Electrical Wiring Diagram	Effective: 17/05/2017	Modified: 17/05/2017	Mike F

Create New ✕

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

Category List Template List

All ▼

Experience Review	Experience Review	(0)Template	☆	
Foundation	Foundation	(0)Template	☆	
General Arrangement...	General Arrangement Drawing	(0)Template	☆	
General Bill Of Material	General Bill Of Material	(0)Template	☆	
Grade Plan	Grade Plan	(0)Template	☆	
Installation Drawing	Installation Drawing	(0)Template	☆	
Invoice	Invoice	(0)Template	☆	
Isometric Drawing	Isometric Drawing	(0)Template	☆	

Title:

Project:

Create Cancel

Select Category from the category list and click Create.



Lifecycle **In Work** Status **Controlled** ▾ Change Info :

Title :

RID : Category : General Arrangement... Version : Size :

Modified :

Document Type window will open.

- **Physical Media** - a stand-alone Physical copy (not attached to any Document) will be considered as an Asset. There could be a Physical Media Asset for a Document.

Select the *Physical Media (PM)* Type.

4

Document Type

- File
- Hyperlink
- Physical Media
- None

5

Ok

Click OK to proceed.

Record Identifier

Primary Identifier

Secondary Identifier

Title ⚠️

Designated Owner

Type and Find

Designated User

Select

Author

Add

Remove

Order

Author

No data to display

Publisher

Select

Notes

Change Information

Effective Date



IST(GMT+05:30)

Additional Information

Project

---Select One---

Discipline

---Select One---

Plant

The *Check Out/In* tab will be disabled till you save the data on the *Item* tab.

Physical Media window will open on the *Item* tab.

Current Location
By clicking on *Saves*, system updates the *Current Location* field same as *Home Location*.

Enter Physical Media details and click *Save*. Confirmation message will display.
Close this window and save the record.

Lifecycle **In Work** Status **Controlled**
Title: Physical Media
RID: Category: General Arrangement... Version: Size:

Save

Modified :

Properties

Details

Record

Physical Media

Item

Check Out/In

Physical Media saved successfully. Please save record to be able to do Check Out/In.

Bar Code 22GT8450LG900

Physical Item ID* Tina A&D manuals

Physical Item Type* Hard copy book

Inserts CD

Home Location* #203-395 Saddleback Rd

Container ID* Black CD Box

Container Type* BOX

Current Location

Container ID

Container Type

Comments

Save

Save & Close

Close

Override Number

Change Category

Clear

Clear

Clear

Publisher

Select

Notes

Change Information

Effective Date

Additional Information

Project

---Select One---

Discipline

---Select One---

Plant





Save

Lifecycle **In Work** Status **Controlled** Change info :

Title: Physical Media

RID: Category: General Arrangement... Version: Size:

Properties

Details

Record Identifier	<input type="text"/>
Primary Identifier	<input type="text"/> <input type="button" value="Override Number"/>
Secondary Identifier	<input type="text"/>
Title	<input type="text" value="Physical Media"/>
Description	<input type="text"/>
Category	<input type="text" value="General Arrangement Drawing"/> <input type="button" value="Change Category"/>
Project	<input type="text" value="Select"/>
Designated Owner	<input type="text" value="Type and Find"/> <input type="button" value="Clear"/>
Designated User	<input type="text" value="Select"/> <input type="button" value="Clear"/>
Author	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Order	<input type="text"/>
Author	<input type="text"/>
No data to display	
Publisher	<input type="text" value="Select"/> <input type="button" value="Clear"/>
Notes	<input type="text"/>
Change Information	<input type="text"/>
Effective Date	<input type="text"/> IST(GMT+05:30)

Enter document Details and click Save. Physical Media record will be created and Primary Identifier will be assigned.

Note: Only the Save button will be displayed when creating a new record.

By default, system inserts "Physical Media" into the Title field.

Additional Information

Project	<input type="text" value="---Select One---"/>
Discipline	<input type="text" value="---Select One---"/>
Plant	<input type="text"/>

Go back to [Section 13: New Document \(Physical Media\)](#) or continue.



Favorites

<input type="checkbox"/>	PM	GAD-0000005 Title: Physical Media RID: 2285494	0.1.0.0	In Work	Controlled	Effective: Modified: 2
<input type="checkbox"/>		2012006-1EC-GAD-000-0014 Title: cac RID: 1928659	0.1.3.0	Submitted		Effective: Modified: 2

Change Information: [Change Information](#)

Change Information: Rev 0

From the *Favorites* screen *Options* menu select the *Files* link to open the *File Section* window.

Options menu: Properties, Files, Unload

Files - Identifier: GAD-0000005 Version: 0.1.0.0 RID: 2285494 Change Info:

Physical Media 0.1.0.0 Uploaded by Mike.Foster19641@gmail.com on 22/05/2017 IST Size : 0 B

1

Action Menu

All options will be visible which you can perform on selected Physical Media.

- Upload Rendition
- Add Physical Media
- Add Hyperlink
- Upload a File

Physical Media Version will display. Click the link to *Check the Physical Media Out*.

Close

Favorites

<input type="checkbox"/>	PM	GAD-000005 Title: Physical M RID: 2285494	
<input type="checkbox"/>		2012006-1EC-G Title: cac RID: 1928659	Size: 0 Bytes
<input type="checkbox"/>		RPT-0000017 Title: cac RID: 1928646	Size: 0 Bytes
<input type="checkbox"/>		2012006-1EF-EWD-000-0011 Title: Business Plan Agenda RID: 1928646	Size: 0 Bytes
<input type="checkbox"/>		2012006-1EF-ELD-000-0004 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 1928622	Size: 0 Bytes

Physical Media window will open.

Physical Media - Identifier: GAD-000005 Vers

Item Check Out/In

Bar Code: 22GT8450LG900

Physical Item ID*: Tina A&D manuals

Physical Item Type*: Hard copy book

Inserts: CD

Home Location*: #203-395 Saddleback Rd

Container ID*: Black CD Box Container Type*: BOX

Current Location: #203-395 Saddleback Rd

Container ID: Black CD Box Container Type: BOX

Comments:

Buttons: Save, Save & Close, Close

Click to open the Check Out/In Tab.

Controlled	Effective: 22/05/2017 Mike F
General Arrangement Drawing	Modified: 22/05/2017 Mike F
Uncontrolled	Effective: 22/05/2017 Mike F
General Arrangement Drawing	Modified: 22/05/2017 Mike F
Uncontrolled	Effective: 22/05/2017 Mike F
Report	Modified: 22/05/2017 Mike F
Uncontrolled	Effective: 18/05/2017 Mike F
Electrical Wiring Diagram	Modified: 20/07/2016 Mike F
Controlled	Effective: 20/07/2016 Mike F
Electrical Drawing	Modified: 20/07/2016 Mike F



Icon	ID	Title	Size	Status	Effective/Modified
PM	GAD-000005	Physical Media	0 Bytes	In Work	22/05/2017
	2012006-1EC-GAD-000-0014	cac	0 Bytes	Submitted	22/05/2017
	RPT-0000017				22/05/2017
	201200				18/05/2017
	201200				20/07/2016

Enter Check Out Details.

Issued Date – just a date and will default to the current date.

Default name of the user who has the Lock.

Due Date is not a mandatory field. You can Checkout PM without this date.

Physical Media - Identifier: GAD-000005

Issue To: Astrid Morneaux

Issued Date: 22/05/2017 17:25:15

Due Date: 25/05/2017

Issued By: Mike Foster

Buttons: Save, Save & Close, Close

Click Save to proceed.



Checked Out record will display in the grid. System greys out the first four (4) columns on save.

Issue To
By clicking the Hyperlink Name will open the User Details window.

The *Checkin* button will be activated.

Physical Media - Identifier: GAD-0000005 Version: RID: 2285494 Change Info: null

Issue To: Mike Foster
Issued Date: 22/05/2017
Due Date: 22/05/2017
Issued By: Mike Foster

Issue To	Issued From	Issued Date	Due Date	Issued By	Returned By	Returned To	Container ID	Return Date	Checkin
Mike F	#203-395 Saddlebag	22/05/2017	22/05/2017	Mike Foster					Checkin

Buttons: Save, Save & Close, Close

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7



Item	Identifier	Version	RID	Change Info	Effective	Modified	Modified By
GAD-000005 Title: Physical Media RID: 2285494	0.1.0.0	In Work		Controlled	Effective: 22/05/2017	Mike F	
2012006-1EC-GAD-000-0014 Title: cac RID: 1928659	0.1.3.0	Submitted		General Arrangement Drawing	Effective: 22/05/2017	Mike F	
RPT-000017 Title: cac RID: 2285268	0.1.0.0			Uncontrolled	Effective: 22/05/2017	Mike F	
2012006-1EF-EWP-000-0011 Title: Business P RID: 1928645	0.1.3.0			Report	Effective: 22/05/2017	Mike F	
2012006-1EF-ELD Title: CONTROL F RID: 1928622	0.1.3.0			Uncontrolled	Effective: 18/05/2017	Mike F	
				Controlled	Effective: 20/07/2016	Mike F	
				Electrical Wiring Diagram			
				Electrical Drawing			

Physical Media - Identifier: GAD-000005 Version: 0.1.0.0 RID: 2285494 Change Info:

Item Check Out/In

Bar Code: 22GT8450LG900

Physical Item ID*: Tina A&D manuals

Physical Item Type*: Hard copy book

Inserts: CD

Home Location*: #203-395 Saddleback Rd

Container ID*: Black CD Box

Current Location: Astrid M

Container ID:

Comments:

Save Save & Close Close

1

Open the *Item* tab to verify Asset's Current Location.

2

The *Current Location* value has been changed. The Name, to whom the Asset has been assigned (*Checked Out*), will be displayed on the *Item* tab. Clicking this, will open the *User Details*.



Favorites

<input type="checkbox"/>	PM	GAD-000005 Title: Physical Media RID: 2285494	0.1.0.0	In Work
<input type="checkbox"/>		2012006-1EC-GAD-000-0014 Title: cac RID: 1928659	0.1.3.0	Submitted
<input type="checkbox"/>		RPT-0000017 Title: cac RID: 2285268	0.1.0.0	
<input type="checkbox"/>		2012006-1EF-EWD-000-0011 Title: Business Plan Agenda RID: 1928645	0.1.3.0	
<input type="checkbox"/>		2012006-1EF-ELD-000-0004 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 1928622	0.1.5.0	

Physical Media - Identifier: GAD-0000005

Check Out/In 3

Issue To: Mike Foster

Issued Date: 22/05/2017

Due Date: 22/05/2017

Issued By: Mike Foster

Issue To	Issued From	Issued Date	Due Date	Issued By	Returned By	Returned To	Container ID	Return	Checkin
Mike F	#203-395 Saddlebag	22/05/2017	22/05/2017	Mike Foster				→	<input type="button" value="Checkin"/>

Save Save & Close Close

Checking In
If you wish to Check In the Asset, Open the *Check Out/In* Tab and follow the steps provided.

Click Checkin. The *Returned By* and *Return Date* fields will be populated.

Click Save to proceed with Checkin.

Controlled	Effective: 22/05/2017	Mike F
General Arrangement Drawing	Modified: 22/05/2017	Mike F
Uncontrolled	Effective: 22/05/2017	Mike F
General Arrangement Drawing	Modified: 22/05/2017	Mike F
Uncontrolled	Effective: 22/05/2017	Mike F
Report	Modified: 22/05/2017	Mike F
Uncontrolled	Effective: 18/05/2017	Mike F
Electrical Wiring Diagram	Modified: 18/05/2017	Mike F
Controlled	Effective: 20/07/2016	Mike F
Electrical Drawing	Modified: 20/07/2016	Mike F



Open the *Item* tab to verify Asset's Current Location.

By saving *Checkin* information, system removes the data.

Item Check Out/In

Issue To: [Dropdown]

Issued Date: 22/05/2017

Due Date: [Dropdown]

Issued By: Mike Foster

Item	Issued Date	Due Date	Issued By	Returned By	Returned To	Container ID	Return Date	Checkin
Mike F #203-395 Saddlebag	22/05/2017	22/05/2017	Mike Foster					Checkin

Save Save & Close Close

Whole row became disabled.





Item

Check Out/In

7

Bar Code 22GT8450LG900

Physical Item ID* Tina A&D manuals

Physical Item Type* Hard copy book

Inserts CD

Home Location* #203-395 Saddleback Rd

Container ID* Black CD Box

Container Type* BOX

Current Location #203-395 Saddleback Rd

Container ID BOX # 3

Container Type BOX

Comments

The *Current Location* and *Container ID* values have been changed.



Click Close.

Save

Save & Close

Close



Record Identifier 2369447

Primary Identifier* PV-00008-RSK Generate Value

Secondary Identifier COM

Change Information* Rev

Version 0.1.3.0

Title* Lack

Description

Category RSK

Author* Cas

Primary Identifier* PV-00008-RSK Generate Value

Secondary Identifier COM

Change Information* Rev

Version 0.1.3.0

Title* Lack

Files - Identifier: PV-00008-RSK Version: 0.1.3.0 RID: 2369447 Change Info: Rev 0

Version Notes More

File Version	Author	Date	Time	Size
0.1.3.0	Iryna M	15/02/2022	Mountain Standard Time	182.63 KB
0.1.3.0	Iryna M	15/02/2022	Mountain Standard Time	13.65 KB

Physical Media - Identifier: PV-00008-RSK Version: 0.1.3.0 RID: 2369447 Change Info: Rev 0

Item Check Out/In

Bar Code

Physical Item ID* PV-00008-RSK

Note:
When adding new Physical Media to the record, the Physical Item ID will auto-populate with the Primary Identifier of this record, but you can edit it to any other value – the Physical Item ID field is editable.