

Section 7

Document Tree Functionality

[Add Node \(Link a Record\)](#)

[Delink Records](#)

[Move Node](#)

[Document Sub-Tree](#)

[Add a Folder](#)

**Add Node
(Link a Record)**

Link a Record (+)

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input checked="" type="checkbox"/>		2924346 (0)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes				3.71 MB	


If you wish to add an object to the Document Tree, checkmark the box and click the *Link a Record* (+) button. A search tool will be provided to search and add existing document record as a node.

Show Deleted

Behavior :Float










































Save Save and Close Close

 3 Items selected.

Grid Layout: Universal

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

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Category	Subfiles	Lock	Menu			
<input type="checkbox"/>		2924345	AREP-0000015	Aero Report - COPY	In Work	1.1.0.0	Aero Report	0				0	0
<input checked="" type="checkbox"/>		2924338	AREP-0000012	WI								0	0
<input type="checkbox"/>		2924336	AREP-0000012	WI							0 of 3	0	0
<input type="checkbox"/>		2924324	AREP-0000013	Ae								0	0
<input type="checkbox"/>		2924329	AREP-0000001	Directional Stability Tests at M=1	In Work	1.1.0.0	Aero Report	0			0 of 4	0	1
<input checked="" type="checkbox"/>		2924325	AREP-0000014	Report_Functional	In Work	0.1.0.0	Aero Report	1				0	1
<input checked="" type="checkbox"/>		2924320	AREP-0000011	Report_Functional	In Work	0.1.0.0	Aero Report	0				0	0
<input checked="" type="checkbox"/>		2924319	AREP-0000010	Aero Report	In Work	0.1.0.0	Aero Report	0				0	0
<input type="checkbox"/>		2924312	AREP-0000000	Directional Stability Tests at M=1	In Work	0.1.0.0	Aero Report	0				0	1
<input type="checkbox"/>							Aero Report	2				0	4
<input type="checkbox"/>							Aero Report	0				0	1
<input type="checkbox"/>							Aero Report	0				0	0
<input type="checkbox"/>							Aero Report	0			2 of 3	0	0
<input type="checkbox"/>							Aero Report	0				3	0
<input type="checkbox"/>							Aero Report	0			4 of 4	0	0

Enter your search criteria.
Click the Search icon.

Search result set will be displayed in the search window.

By selecting the record (checkmark the box), the *Link* buttons will be activated.

- Click *Link* to link the records to the Document Tree and keep the Search window open to continue selection.
- Click *Link & Close* to link the records and close the Search window.

Confirmation message will display.

Record(s) linked successfully

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input checked="" type="checkbox"/>		2924346 (0)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes				3.71 MB	
<input type="checkbox"/>		2924320	AREP-0000011	Report_Functional	In Work	0.1.0.0					1.78 MB	2022
<input type="checkbox"/>		2924325	AREP-0000014	Report_Functional	In Work	0.1.0.0					1.78 MB	2022
<input type="checkbox"/>		2924338	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0					10.28 MB	2022

Colour of newly added nodes are different until applying Save.

The Save buttons have been activated. The *Close* button changed to *Cancel*.
Select the following options:

- Click *Save* to commit the added records and keep the Tree window open.
- Click *Save and Close* to commit the added records and close the Tree window.
- Click *Cancel* and any change made within the tree will be cancelled.

Save Save and Close Cancel

By saving your changes, the Confirmation message will display.

The root node will show the record count in the brackets.

Tree Updated Successfully. ✕

The Save buttons will be disabled and Cancel button will change to Close.

<input type="checkbox"/>	Type	Record ID		Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>		2924346 (3)	Template	In Work	0.1.0.0	Yes				3.71 MB	
<input type="checkbox"/>		2924320 (0)	Functional	In Work	0.1.0.0	Yes				1.78 MB	2022
<input type="checkbox"/>		2924338 (0)	AREP-000012	In Work	0.2.1.0	Yes				10.28 MB	2022
<input type="checkbox"/>		2924325 (0)	AREP-000014 Report_Functional	In Work	0.1.0.0	Yes				1.78 MB	2022

1 Item selected.

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

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Category	Subfiles	Lock	Menu	Workflow	Tree	Wh
<input type="checkbox"/>		2924345	AREP-0000015	Aero Report - COPY	In Work	1.1.0.0	Aero Report	0				0	0
<input type="checkbox"/>		2924338	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Aero Report	0				0	1
<input type="checkbox"/>		2924336	AREP-0000012	WhereUsedResultSet	In Work	0.1.0.0	Aero Report	0			0 of 3	0	0
<input type="checkbox"/>		2924324	AREP-0000013									0	0
<input type="checkbox"/>		2924329	AREP-0000001								0 of 4	0	1
<input type="checkbox"/>		2924325	AREP-0000014									0	2
<input checked="" type="checkbox"/>		2924320	AREP-0000011									0	1
<input type="checkbox"/>		2924319	AREP-0000010									0	0
<input type="checkbox"/>		2924313	AREP-0000009	Directional Stability Tests at M=1	In Work	0.1.0.0	Aero Report	0				0	1
<input type="checkbox"/>		2924312	AREP-0000008	Aero Report - COPY	In Work	0.1.0.0	Aero Report	2				0	4
<input type="checkbox"/>		2924311	AREP-0000007	WhereUsedResultSet - COPY(2)	Merged	0.1.0.0	Aero Report	0				0	1
<input type="checkbox"/>		2924308	AREP-0000006	Directional Stability Tests at M=1	In Work	0.1.0.0	Aero Report	0				0	0
<input type="checkbox"/>		2924275	AREP-0000005	WhereUsedResultSet	Merged	0.1.0.0	Aero Report	0			2 of 3	0	0
<input type="checkbox"/>		2901859	AREP-0000002	PLAdd1ddddddd120	In Work	0.1.0.0	Aero Report	0				3	0
<input type="checkbox"/>		2891784	AREP-0000002		In Work	0.1.0.0	Aero Report	0			4 of 4	0	0

If you wish, you can add a document record as many times as you need. For the Document Tree duplicate records are allowed.

Note: Duplicate records will not be displayed in the *Grid view*, instead their count will be displayed in the Count column.

1

Click Link & Close.

2 Link Link & Close Close

[refresh] [undo] [redo] [back] [print] [eye] Show More [checkmark] 1 Item selected. Layout: Tree Layout (NSL) [lock icon] [star icon] [list icon] Export [gear icon]

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input checked="" type="checkbox"/>	[document icon]	[-] 2924346 (3)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes	[dropdown]	[lock icon]		3.71 MB	
<input type="checkbox"/>	[document icon]	2924320 (0)	AREP-0000011	Report_Functional	In Work	0.1.0.0	Yes	[dropdown]	[lock icon]		1.78 MB	2022
<input type="checkbox"/>	[document icon]	2924338 (0)	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes	[dropdown]	[lock icon]		10.28 MB	2022
<input type="checkbox"/>	[document icon]	2924325 (0)	AREP-0000014	Report	In Work	0.1.0.0	Yes	[dropdown]	[lock icon]		1.78 MB	2022

The warning message will display.

Warning [close icon]

Are you sure? You have added duplicate records.

[3] Ok Cancel

Click OK to proceed.

Document Tree - Identifier: AREP-0000018 Version: 0.1.0.0 RID: 2924346 Change Info: Rev

Layout: Tree Layout (NSL) 1 Item selected.

Delink Records

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>		2924346 (4)	AREP-0000018		In Work	0.1.0.0	Yes				3.71 MB	
<input checked="" type="checkbox"/>		2924320 (0)	AREP-0000011		In Work	0.1.0.0	Yes				1.78 MB	2022,
<input type="checkbox"/>		2924320 (0)	AREP-0000011		In Work	0.1.0.0	Yes				1.78 MB	2022,
<input type="checkbox"/>		2924338 (0)	AREP-0000012		In Work	0.2.1.0	Yes				10.28 MB	2022,
<input type="checkbox"/>		2924325 (0)	AREP-0000014		In Work	0.1.0.0	Yes				1.78 MB	2022,

Duplicate records are displayed, and the record count is updated.

Note: Duplicate records will not be displayed in the *Grid view*, instead, their count will be shown in the *Count* column.

Document Tree - Identifier: AREP-0000018 Version: 0.1.0.0 RID: 2924346 Change Info: Rev

Layout: Tree_grid

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Status	Size	Menu	Lock	Count	SI (Document)	SI (Ancillary)	SI (Xref)
<input type="checkbox"/>		2924320	AREP-0000011	Report_Functional	In Work	0.1.0.0	Controlled	1.78 MB			2	0	0	0
<input type="checkbox"/>		2924338	AREP-0000012	WhereUsedResultSe	In Work	0.2.1.0	Controlled	10.28 MB			1	0	0	0
<input type="checkbox"/>		2924325	AREP-0000014	Report_Functional	In Work	0.1.0.0	Controlled	1.78 MB			1	0	0	0
<input type="checkbox"/>		2924346	AREP-0000018	Document Template	In Work	0.1.0.0	Controlled	3.71 MB			1	0	0	0

Delink Record

If you wish to remove an object from the Document Tree, checkmark the box and click the *Delink* button.

Click *Undo* icon to cancel deletion process.

Deleted item records will be shown in 'font with Strikeout'. By deleting a node that contains the child nodes related, will remove all child nodes as well.

Click *Save* to commit the changes and keep the Tree window open.
Click *Save and Close* to commit the changes and close the Tree window.
Click *Cancel* and any change made within the tree will be cancelled.

Document Tree - Identifier: AREP-0000018 Version: 0.1.0.0



Delink Records

<input type="checkbox"/>	Type	Record ID	Internal ID				Latest	Menu	Loc			
<input type="checkbox"/>		<input type="checkbox"/> 2924346 (4)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes					
<input checked="" type="checkbox"/>		<input type="checkbox"/> 2924320 (1)	AREP-0000011	Report_Functional	In-Work	0.1.0.0	Yes					
<input type="checkbox"/>		<input type="checkbox"/> 2924325 (0)	AREP-0000014	Report_Functional	In-Work	0.1.0.0	Yes					
<input type="checkbox"/>		<input type="checkbox"/> 2924341 (0)	AREP-0000011	Report_Functional	In Work	0.1.0.0	Yes					
<input type="checkbox"/>		<input type="checkbox"/> 2924338 (0)	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes				10.28 MB	2022
<input type="checkbox"/>		<input type="checkbox"/> 2385234 (0)	AREP-0000014	Report_Functional	In Work	0.1.0.0	Yes				1.78 MB	2022



Save Save and Close Cancel

1 Show rows: 20 1-13 of 13

By saving your changes, the Confirmation message will display.

The root node record count will be updated.

Tree Updated Successfully

The Save buttons will be disabled and Cancel button will change to Close.

Document Tree - Identifier: AREP-0000018 Version: 0

Layout: Tree Layout (NSL) [Lock] [Star] [List] [Export] [Settings]

<input type="checkbox"/>	Type	Record ID	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>	2924346 (3)	template	In Work	0.1.0.0	Yes	▼	🔒		3.71 MB	
<input type="checkbox"/>	2924341 (0)	AREP-0000012 Report_Functional	In Work	0.1.0.0	Yes	▼	🔒		1.78 MB	2022
<input type="checkbox"/>	2924338 (0)	AREP-0000012 WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes	▼	🔒		10.28 MB	2022
<input type="checkbox"/>	2385234 (0)	AREP-0000014 Report_Functional	In Work	0.1.0.0	Yes	▼	🔒		1.78 MB	2022

Show Deleted Behavior: Float [Info]

[Save] [Save and Close] [Close]

Move Node

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>	📁	2924346 (3)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes	☰	🔒		3.71 MB	
<input type="checkbox"/>	📄	2924338 (0)	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes	☰	🔒		10.28 MB	2022
<input type="checkbox"/>	📄	2889416 (0)	EREP-0000001	Effect of Failure in ASTRA Scanner Drive Hydraulic Sy	Released	1.0.0.0	Yes	☰	🔒	2021/08/07	0 Bytes	2021
<input type="checkbox"/>	📄	2889426 (0)	SREP-0000001	Load System of the General Stress Analysis of the Ai	Released	1.0.0.0	Yes	☰	🔒	2021/08/07	0 Bytes	2021



Using Drag and Drop function you can move the node within the Tree structure.

Note:
By moving a node that contains the child nodes related, will move selected node with its child nodes.

Is Latest	Menu	Lock	Release Date	Size	L
Yes	▼	🔒		3.71 MB	
Yes	▼	🔒		10.28 MB	2022
Yes	▼	🔒	2021/08/08		2021
Yes	▼	🔒	2021/08/08	0 Bytes	2021
Yes	▼	🔒	2021/08/08	0-Bytes	2021

Move to Node window with two (2) options will display.

Move to Node [X]

This action will move selected items under the item you have just selected. Do you want to continue?

3 **Move** **Cancel**

Click Move to continue.

Cancel
By selecting this button, the Move To process will be cancelled and no changes will be made.

Move
Click this button to move selected node to a new location.

By saving your changes, the Confirmation message will display.

Tree Updated Successfully. x

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>		2924346 (2)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes				3.71 MB	
<input type="checkbox"/>		2924338 (1)	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes				10.28 MB	2022
<input type="checkbox"/>		2889426 (0)	AREP-0000001	Load System of the General Stress Analysis of the Ai	Released	1.0.0.0	Yes			2021/08/08	0 Bytes	2021
<input type="checkbox"/>		2889416 (0)	AREP-0000001	Effect of Failure in ASTRA Scanner Drive Hydraulic Sy	Released	1.0.0.0	Yes			2021/08/07	0 Bytes	2021

Selected node has been moved to a new location.

The Save buttons will be disabled.

Save Save and Close Close

You can open Document Tree in a separated page.

Document Sub-Tree

Document Tree - Identifier: AREP-0000018 Version: 0.1.0.0 RID: 2924346 Change

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>		2924346 (5)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes				3.71 MB	
<input type="checkbox"/>		2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes				1.47 MB	2022
<input type="checkbox"/>		2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes				1.47 MB	2022
<input type="checkbox"/>		2924347 (0)	3DM-CSA-0000004	3D CADD C/S/A Model 1	In Work	0.1.0.0	Yes				1.04 MB	2022
<input type="checkbox"/>		2924338 (1)	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes				10.28 MB	2022
<input type="checkbox"/>		2889416 (0)	EREP-0000001	Effect of Failure in ASTRA Scanner Drive Hydraulic Sy	Released	1.0.0.0	Yes			2021/08/08	0 Bytes	2021

Some records in the tree will appear with indication (an arrow), if they contain own trees. By clicking the arrow, a sub-tree will open in the same window.

Click the *Back* arrow to go back to the previous tree.

Document Tree - Identifier: 3

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input type="checkbox"/>		2924347 (3)	3DM-CSA-0000004	3D CADD C/S/A Model 1	In Work	0.1.0.0	Yes				1.04 MB	2022
<input type="checkbox"/>		2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes				1.47 MB	2022
<input type="checkbox"/>		2397419 (0)	DWG-STR-0000008	Piperack Stick Built 8800-PRM-045A to 046A Section	Released	3.0.0.0	Yes			2017/09/01	0 Bytes	2021
<input type="checkbox"/>		2385234 (0)	DWG-STR-0000015	Area 8100 Piperack Module 8100-PRM-006 Plans Elev	In Work	0.1.2.0	Yes				0 Bytes	2021

Go back to previous tree

AREP-0000018 Lifecycle: **In Work** Status: **Controlled** Change Info: Rev

Title: Document Template
 RID: [2924346](#) Version: [0.1.0.0](#)

Modified: 2022/10/14

Show Latest Show Deleted

Checkmark the box to see Deleted Records.

Behavior: Float Layout: Tree Layout (NSL) Export

<input type="checkbox"/>	Type	Record ID	Internal ID		Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	Last Modified	Plant
<input type="checkbox"/>		2924346 (8)	AREP-0000018	Document Template	In Work	0.1.0.0	Yes				3.71 MB		
<input type="checkbox"/>		2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes				1.47 MB	2022/10/10	
<input type="checkbox"/>		2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes				1.47 MB	2022/10/10	
<input type="checkbox"/>		2924347 (0)	3DM-CSA-0000004	3D CADD C/S/A Model 1	In Work	0.1.0.0	Yes				1.04 MB	2022/10/13	
<input type="checkbox"/>		2924320 (1)	AREP-0000011	Report_Functional	In Work	0.1.0.0	Yes				1.78 MB	2022/10/03	
<input type="checkbox"/>		2924320 (0)	AREP-0000011	Report_Functional	In Work	0.1.0.0	Yes				1.78 MB	2022/10/03	
<input type="checkbox"/>		2924338 (1)	AREP-0000012	WhereUsedResultSet - COPY(2)	In Work	0.2.1.0	Yes				10.28 MB	2022/10/11	
<input type="checkbox"/>		2924325 (0)	AREP-0000019	Report_Functional	In Work	0.1.0.0	Yes				1.78 MB	2022/10/03	
<input type="checkbox"/>		2889416 (0)	EREP-0000001	Effect of Failure in ASTRA Scanner Drive Hydraulic Sy	Released	1.0.0.0	Yes			2021/08/08	0 Bytes	2021/08/04	

Add a Folder
You can organise document records in the *Tree*.

If you wish to create a New Folder, checkmark the node and select *Add a Folder*.

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Status	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input checked="" type="checkbox"/>		2924347 (3)	3DM-CSA-0000004	3D CADD C/S/A Model 1	In Work	0.1.0.0	Yes				1.04 MB	2022
<input type="checkbox"/>		2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes				1.47 MB	2022
<input type="checkbox"/>			DWG-STR-0000008	Piperack Stick Built 8800-PRM-045A to 046A Section:	Released	3.0.0.0	Yes			2017/09/01	0 Bytes	2021
<input type="checkbox"/>			DWG-STR-0000015	Area 8100 Piperack Module 8100-PRM-006 Plans Elev	In Work	0.1.2.0	Yes				0 Bytes	2021

[refresh] [undo] [redo] [back] [download] [eye] Show More [checkmark] 1 Item selected. Layout: Tree Layout (NSL) [lock] [star] [list] Export [gear]

<input type="checkbox"/>	Type	Record ID	Internal ID	Title	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
<input checked="" type="checkbox"/>	[Word icon]	2924347 (3)	3DM-CSA-0000004	3D CADD C/S/A Model 1	In Work	0.1.0.0	Yes	[dropdown]	[lock]		1.04 MB	2022
<input type="checkbox"/>	[Image icon]	2924341 (0)	3DM-CSA-0000003	3D CADD C/S/A Model	In Work	1.2.0.0	Yes	[dropdown]	[lock]		1.47 MB	2022
<input type="checkbox"/>	[Image icon]	2397419 (0)	DWG-STR-0000008	Piperack Stick Built 8800-PRM-045A to 046A Section:	Released	3.0.0.0	Yes	[dropdown]	[lock]	2017/09/01	0 Bytes	2021
<input type="checkbox"/>	[Image icon]	2385234 (0)	DWG-STR-0000015	Area 8100 Piperack Module 8100-PRM-006 Plans Elev	In Work	0.1.2.0	Yes	[dropdown]	[lock]		0 Bytes	2021

New Folder [close icon]

3

Title *

Description

4

In the *New Folder* window, enter the folder Title and Description. Click Save to create it.

New Folder created and added as a child node.

☐	Type	Record ID	Inte	Lifecycle State	Version	Is Latest	Menu	Lock	Release Date	Size	L
☐	📁	2924347 (4)	3DM	In Work	0.1.0.0	Yes	☐	🔒		1.04 MB	2022
☐	📁		Document Management				☐	🔒		29.22 KB	
☐	📄	2924311 (0)	AREP-0000007	Merg			☐	🔒		3.54 KB	2022
☐	📄	2924312 (0)	AREP-0000008	In W			☐	🔒		25.68 KB	2022
☐	📄	2889436 (0)	WBREP-0000003	Released	1.0.0.0	Yes	☐	🔒			
☐	📄	2924341 (0)	3DM-CSA-0000003	In Work	1.2.0.0	Yes	☐	🔒			
☐	📄	2397419 (0)	DWG-STR-0000008	Released	3.0.0.0	Yes	☐	🔒			
☐	📄	2385234 (0)	DWG-STR-0000015	In Work	0.1.2.0	Yes	☐	🔒			

You can link the records to this folder.

Rename Folder
 You can rename your folder on the Tree:

- From the *Menu*, select *Rename*
- Enter New Title name.
- Save.