

Section 6

Document Tree

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[Document Tree Window](#)

Icons to Refresh, Expand/Collapse entire Tree.

If you wish to open Document Tree in a separate tab, click this button.

By default, the Tree is showing in a separate window and in collapsed form. Click +/- icon to expand it. Document Tree Root node will be displayed for viewing purpose only. It cannot be moved or deleted.

You can see additional record information from the dropdown Menu.

Admin user can modify Document Tree Configuration settings:

- *Float*: when object linked to the tree is versioned up, the tree will show the latest version.
- *Fixed*: when object linked to the tree is versioned up, the tree will continue to show the object that was originally linked.

To see deleted records, check the *Show Deleted* box. It is unchecked by default.

The Save buttons will be disabled if there are no changes on the tree.

Activity	Change LC	Dashboard
Discussion	Files	Rename
Security	Related	Tree
Vers Hist	Vers Up	Where

Show Deleted Behavior :Float ⓘ

1 Show rows: 20 1-12 of 12

Show

The *Show* picklist will only show if more than the root node is exposed.



- Show as Linked
- Show All
- Show Current
- Show Latest

<input type="checkbox"/>	Type	Record	Internal ID	Title	Lifecycle State	Version	Is Latest	<input type="checkbox"/>
<input type="checkbox"/>			DWG-PROC-0000003	Block Flow Diagram (BFD) - COPY(1) - COPY	Released	1.0.0.0	Yes	<input type="checkbox"/>
<input type="checkbox"/>		2924329 (0)	AREP-0000001	Directional Stability Tests at M=1.57 on a 1-80 Scale	In Work	1.1.0.0	Yes	<input type="checkbox"/>
<input type="checkbox"/>		2924311 (0)	AREP-0000007	WhereUsedResultSet - COPY(2)	Merged	0.1.0.0	Yes	<input type="checkbox"/>
<input type="checkbox"/>		2924313 (2)	AREP-0000009	Directional Stability Tests at M=1.57 on a 1-80 Scale	In Work	0.1.0.0	Yes	<input type="checkbox"/>
<input type="checkbox"/>		2889427 (0)	SREP-0000002	Structural Integrity Program	Released	1.0.0.0	Yes	<input type="checkbox"/>
<input type="checkbox"/>		2889433 (0)	TREP-0000001	Preliminary Note on the CF-105 Intake Tests at Lewis	Released	1.0.0.0	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"/>		2924345 (0)	AREP-0000015	Aero Report - COPY	In Work	1.1.0.0	Yes	<input type="checkbox"/>

Is Latest

- Yes: Record is Latest.
- No : Record is not latest.

The *Show* picklist will apply to the entire grid, not just the selected items. There is no need to select any items. If you refresh the Tree, the setting will revert to default:

- For the floating trees default is *Show Latest*.
- For the fixed trees default is *Show as Linked*.

Note:

The version of the root node will not change when changing the *Show* picklist value.

Picklist values:

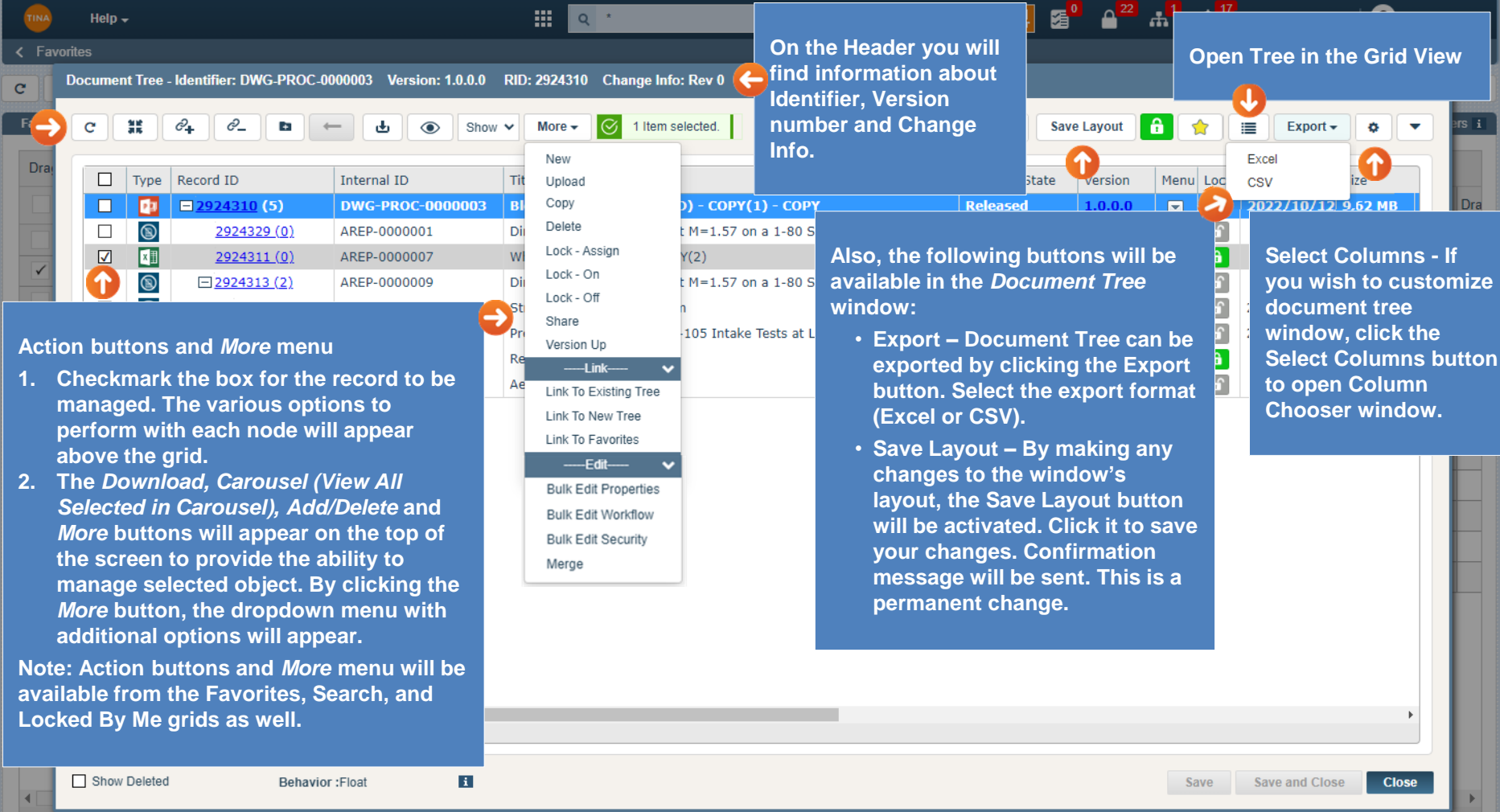
- *Show all*: this will show all versions.
- *Show Current*: will show the highest major version for all records.
- *Show Latest*: this will show the highest version number for the record.
- *Show as Linked*: will display the record that was initially linked on the tree.

Note:

Changing the default behavior of *Show* will Disable the option that can update the Tree and will uncheck any record if selected. The notification will display:

To edit the tree please select "Show Latest"





On the Header you will find information about Identifier, Version number and Change Info.

Open Tree in the Grid View

Action buttons and *More* menu

1. Checkmark the box for the record to be managed. The various options to perform with each node will appear above the grid.
2. The *Download*, *Carousel (View All Selected in Carousel)*, *Add/Delete* and *More* buttons will appear on the top of the screen to provide the ability to manage selected object. By clicking the *More* button, the dropdown menu with additional options will appear.

Note: Action buttons and *More* menu will be available from the Favorites, Search, and Locked By Me grids as well.

Also, the following buttons will be available in the *Document Tree* window:

- Export – Document Tree can be exported by clicking the Export button. Select the export format (Excel or CSV).
- Save Layout – By making any changes to the window’s layout, the Save Layout button will be activated. Click it to save your changes. Confirmation message will be sent. This is a permanent change.

Select Columns - If you wish to customize document tree window, click the Select Columns button to open Column Chooser window.