

Section 5

New Document (File)

[Create New Record Window](#)

[Creating New Document](#)

[Properties Tab](#)

[New Document \(Hyperlink\)](#)

[Action menu](#)

[Set Document as Template](#)

[Download a File](#)

[Download File Locked by you](#)

[Version Number Right-click menu](#)

[Image Viewer Page](#)

[Upload a File](#)

Menu

- [Files Window](#)
- [Time /Time Zone](#)
- [Upload a Sub-File](#)
- [Sharing Data](#)
- [Remove File](#)
- [Set File as Viewable](#)
- [Set as Latest](#)
- [Delete All Older Versions](#)
- [Delete Versions](#)
- [Add Notes](#)
- [Edit/Delete Notes](#)
- [Edit Hyperlink](#)
- [Activity History](#)
- [Related Items](#)
- [Document Tree](#)
- [Where Used](#)
- [Workflow](#)
- [Version History](#)
- [Security](#)
- [Version Up](#)

[Change Info rules](#)

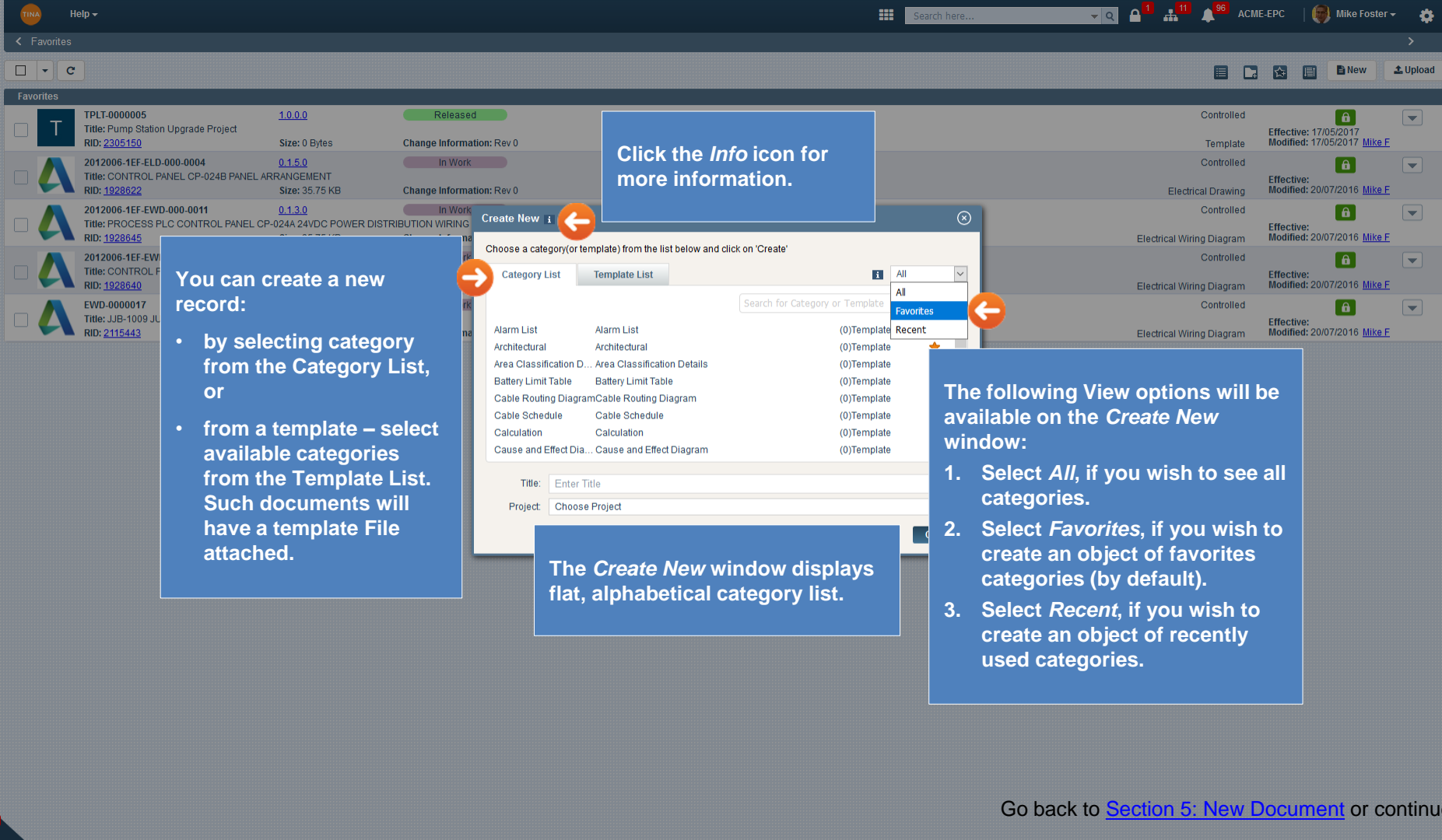




Favorites										
<input type="checkbox"/>		TPLT-0000005 Title: Pump Station Upgrade Project RID: 2305150	1.0.0.0	Released	Change Information: Rev 0					<input type="checkbox"/>
<input type="checkbox"/>		2012006-1EF-ELD-000-0004 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 1928622	0.1.5.0	In Work	Change Information: Rev 0					<input type="checkbox"/>
<input type="checkbox"/>		2012006-1EF-EWD-000-0011 Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC POWER DISTRIBUTION WIRING DIAGRAM RID: 1928645	0.1.3.0	In Work	Change Information: Rev 0	Controlled	Effective: Modified: 20/07/2016			<input type="checkbox"/>
<input type="checkbox"/>		2012006-1EF-EWD-000-0013 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 1928640	0.1.5.0	In Work	Change Information: Rev 0	Controlled	Effective: Modified: 20/07/2016			<input type="checkbox"/>
<input type="checkbox"/>		EWD-0000017 Title: JJB-1009 JUNCTION BOX LAYOUT RID: 2115443	0.2.3.0	In Work	Change Information: Rev 0	Controlled	Effective: Modified: 20/07/2016			<input type="checkbox"/>

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





Click the *Info* icon for more information.

You can create a new record:

- by selecting category from the Category List, or
- from a template – select available categories from the Template List. Such documents will have a template File attached.

The *Create New* window displays flat, alphabetical category list.

The following View options will be available on the *Create New* window:

1. Select *All*, if you wish to see all categories.
2. Select *Favorites*, if you wish to create an object of favorites categories (by default).
3. Select *Recent*, if you wish to create an object of recently used categories.

Select category from the *Category List* tab. The *Create* button will appear.

Create New i

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

Category List ← Update List i All ▼

electrical Wiring Diagram 1 Q ←

Electrical Wiring Diag... Electrical Wiring Diagram (0)Template

Title: Enter Title

Project: Choose Project

3 Create Cancel

Create New record window supports Search functionality:

- Enter a category name in the search field.
- Click the *Search* icon.

Click *Create* to proceed.

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

Title : JJB-1009 JUNCTION BOX LAYOUT

Modified :

RID : Category : Electrical Wiring Diagr... Version : Size :

Properties

Details

Document Type window will open to provide the following options:

1. **File** – selecting this option you will have the ability to create a new record and attach a file to it.
2. **Hyperlink** - selecting this option you will have the ability to create a new record and attach a hyperlink to the object.
3. **Physical Media** - a stand-alone Physical copy (not attached to any Document) .
4. **None** - this option will give you flexibility to be able to create a record without attaching a document file or entering a hyperlink.

Document Type

- File
 Hyperlink
 Physical Media
 None

The **File** option will be selected by default.

Click **OK** to create.

Override Number

Change Category

Clear

Clear

No data to display

Publisher **Select**

Notes

Change Information

Effective Date

📅 IST(GMT+05:30)

Additional Information

Project **---Select One---**Discipline **---Select One---**

Plant

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

Title: JJB-1009 JUNCTION BOX LAYOUT

Modified :

RID : Category : Electrical Wiring Diag... Version : Size :

Properties

Details

Record Identifier

Primary Identifier

Secondary Identifier

Title **JJB-**

Description

Category **Elect**Project **Sele**Designated Owner **Type**Designated User **Sele**Author **Ad**

Order

Publisher **Select**

Notes

Change Information

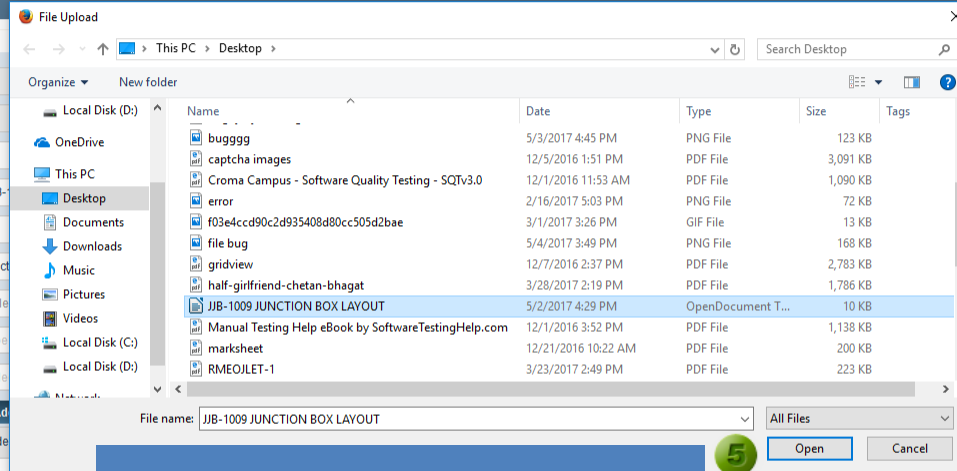
Effective Date

IST(GMT+05:30)

Additional Information

Project **---Select One---**Discipline **---Select One---**

Plant



Override Number

Change Category

Clear

Clear

Clear

Lifecycle Status Change Info:
 Title: JJB-1009 JUNCTION BOX LAYOUT
 RID: Category: Electrical Wiring Diagram... Version: Size: 9.11 KB



When a new document is created - *Change Info* will be set to *Rev 0* value.

Properties

Details

Record Identifier
 Primary Identifier
 Secondary Identifier
 Title
 Description
 Category
 Project
 Designated Owner
 Designated User
 Author

The system will be able to assign sequence-generated (SG) numbers based on the document category.*

To override a sequence generated number for Internal Doc Number:

1. Hit *Override Number* and enter the Primary Identifier.**
2. Click *Save* to commit your changes. If you didn't Save, no changes will be made.

You will be able to create a records with the same SG number. A warning message will display to notify you.

Order	Author
No data to display	



Override Number

Change Category

Clear

Clear

Clear

7

Enter document *Details* and *Save* the record.

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

***Override Number*

Primary Identifier is a mandatory field.

- If a category has no recipe, the *Primary Identifier* will be editable.
- If the category has a recipe, the *Primary Identifier* will not be editable.
- If you wish to override the recipe rule, click the *Override Number* button and the *Primary Identifier* will become editable. The *Override Number* button will change to *Generate Number*.

You can add created record to the Favorites by clicking this icon.

2012006-1EF-EWD-000-0038 Lifecycle: In Work status: Controlled Change Info: Rev 0
Title: LJB-1102 JUNCTION BOX LAYOUT
RID: 1928642 Category: Electrical Wiring Diagram Version: 0.1.2.0 Size: 35.75 KB



Modified: 20/07/2016 Astrid M

Click Lock/Unlock icon to take/revoke ownership of the document.

Properties

You can see document Details on the Properties page.

Details

By hover over the Modified hyperlink, tooltip with the full user name will display. By clicking hyperlink, the User Details window will open.

Secondary Identifier: [input] Generate Number

Title: LJB-1102 JUNCTION BOX LAYOUT

Description: [input]

Category: Electrical Wiring Diagram Change Category

Project: Pump Station Upgrade

Designated Owner: Jaldeep Singh

Designated User: Jaldeep Singh

Author: Add Remove

Order: [input]

no data to display

Publisher: Select Clear

Notes: [input]

Change Information: Rev 0

Effective Date: [calendar icon] IST(GMT+05:30)

You will be able to Change Category for the record.
Note: Change category will not allowed if it has more than one version.

Additional Information

Project: ---Select One---

Discipline: ---Select One---

Plant: [input]

New Document (Hyperlink)



Document Type window:

- Hyperlink - selecting this Document Type you will have the ability to create a new record and attach a hyperlink to the object.

The *Add Hyperlink* window will open.

Document Type

File

Hyperlink

Physical Media

None

Ok

Select the *Hyperlink* type.

Click *OK* to proceed.

Add Hyperlink

Text To Display * Hyperlink

Link To * https Tina5s.com

https://Tina5s.com

Ok

Enter Hyperlink information and click *OK*.

By default, system inserts "Hyperlink" into the *Text To Display* field.

Enter document Details and click *Save* . Document "Hyperlink" has been created.

PV-22-0001-ADP Lifecycle : In Work Status : Draft

Title : Hyperlink

RID : 2790030 Category : ADP Version : 0.1.0.0

Change Information*

Version	0.1.0.0
Title*	Hyperlink
Description	
Category	ADP

Hyperlink Version will display. Click to follow.

By default, system inserts "Hyperlink" into the *Title* field.

The following buttons will be available for the Owner.

EWD-0000020 Lifecycle **In Work** Status **Controlled** Change Info: Rev 0
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 2305179 Category: Electrical Wiring Diagram Version: [0.2.0.0](#) Size: 35.75 KB

Properties

Details

Record Identifier	2305179
Primary Identifier	EWD-0000020
Secondary Identifier	
Title	CONTROL PANEL CP-024B PANEL ARRANGEMENT
Description	
Category	Electrical Wiring Diagram Change Category
Project	Select
Designated Owner	Type and Find <input type="text"/> <input type="button" value="Clear"/>
Designated User	Select <input type="text"/> <input type="button" value="Clear"/>
Author	<input type="button" value="Add"/> <input type="button" value="Remove"/>
Order	Author
No data to display	
Publisher	Select <input type="text"/> <input type="button" value="Clear"/>
Notes	
Change Information	Rev 0
Effective Date	<input type="text"/> IST(GMT+05:30)

Additional Information

Project	2012006
Discipline	1EF - Electrical instrumentation & Controls Eng.
Plant	000

Action menu

Depends on Security settings, the **Action** button will provide the following options:

- **Copy** - create a Copy of existing record.
- **Delete** – delete this record.
- **Upload** – you will be able to upload a file from the Properties page.

Go back to [Section 5: New Document](#) or continue.

The record can be Set as Template.



Set as Template

Save

Correction Mode

Cancel

Action



EWD-0000020

Lifecycle

In Work

Status

Controlled

Change Info: Rev 0



Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT

RID: 2305179

Category: Electrical Wiring Diagram Version: 0.2.0.0

Size: 35.75 KB



Modified: 17/05/2017

[Mike F](#)

Properties

Details

Record Identifier	2305179	
Primary Identifier	EWD-0000020	Generate Number
Secondary Identifier		
Title	CONTROL PANEL CP-024B PANEL ARRANGEMENT	
Description		
Category	Electrical Wiring Diagram	Change Category
Project	Select	
Designated Owner	Type and Find	Clear
Designated User	Select	Clear
Author	<button>Add</button> <button>Remove</button>	
Order	Author	
No data to display		
Publisher	Select	Clear
Notes		
Change Information	Rev 0	
Effective Date		IST(GMT+05:30)

Additional Information

Project	2012006
Discipline	1EF - Electrical instrumentation & Controls Eng.
Plant	000

EWD-0000020 Lifecycle **In Work** Status **Controlled** Change Info: Rev 0
Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT
RID: 2305179 Category: Electrical Wiring Diagram Version: [0.2.0.0](#) Size: 35.75 KB

Set as Template Save Correction Mode Cancel Action

Modified: 17/05/2017 [Mike F](#)

Properties

Details

Record Identifier	2305179
Primary Identifier	EWD-0000020
Secondary Identifier	
Title	CONTROL PANEL CP-024B PANEL ARRANGEMENT
Description	
Category	Electrical Wiring Diagram
Project	Select
Designated Owner	Type and Find
Designated User	Select
Author	Add Remove
Order	Author

No data to display

The *Template Information* window will open. Enter Template Description.

Template Information

Template Title	CONTROL PANEL CP-024B PANEL ARRANGEMENT
Description	Wiring Diagram

[Save](#) [Cancel](#)

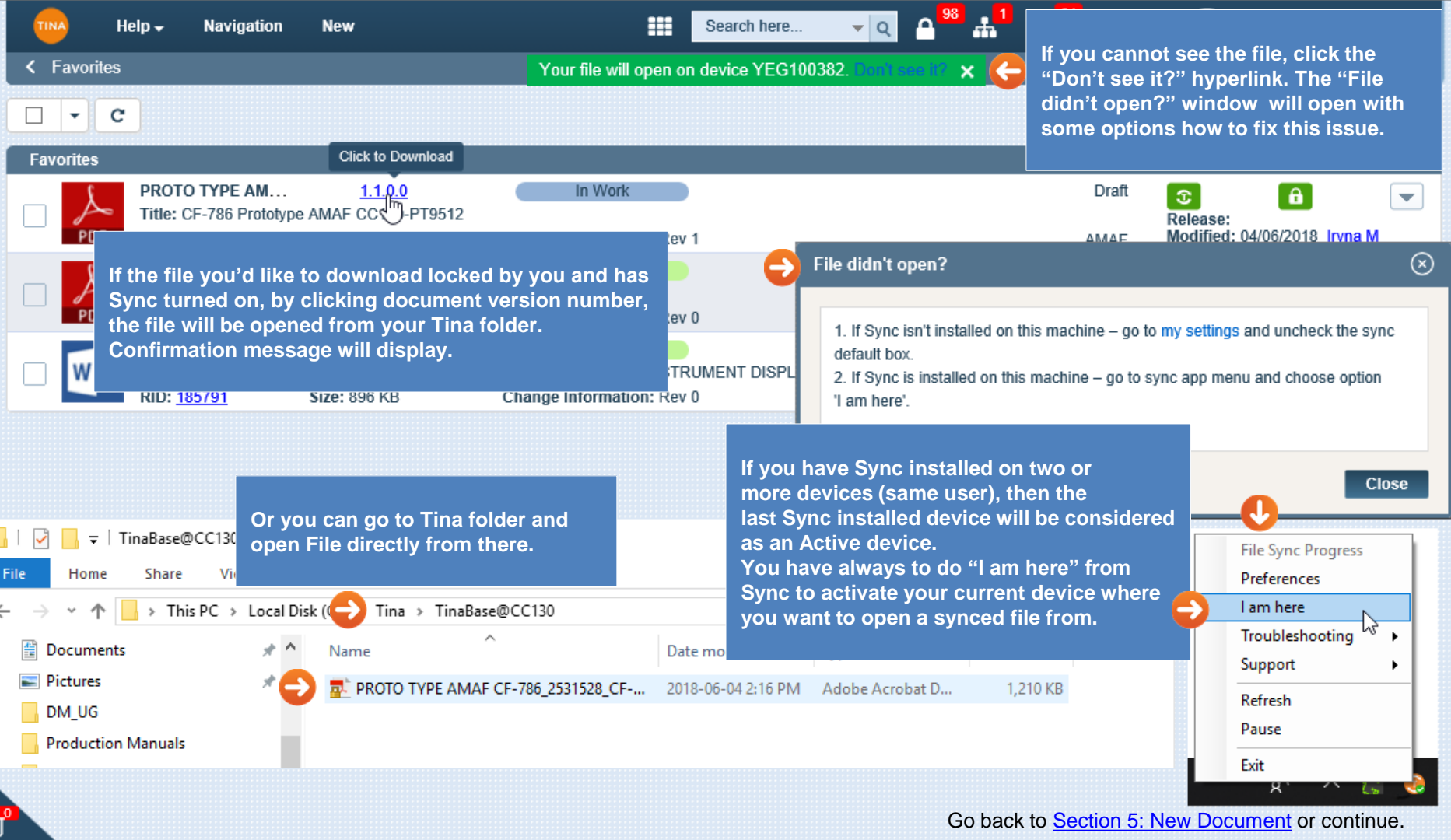
Click Save to complete.

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. More information can be found in [Section 16: Create a New Document Template](#) of this manual.

Additional Information

Plant 000

Go back to [Section 5: New Document](#) or continue.

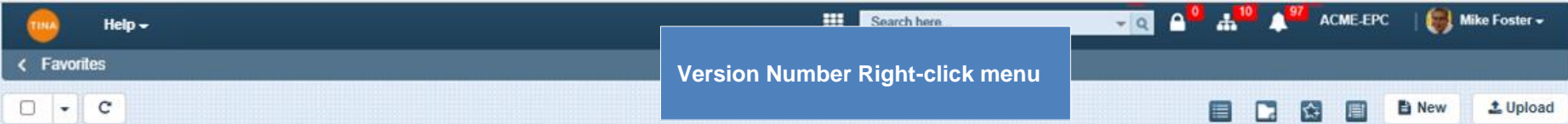


If you cannot see the file, click the “Don’t see it?” hyperlink. The “File didn’t open?” window will open with some options how to fix this issue.

If the file you’d like to download locked by you and has Sync turned on, by clicking document version number, the file will be opened from your Tina folder. Confirmation message will display.

Or you can go to Tina folder and open File directly from there.

If you have Sync installed on two or more devices (same user), then the last Sync installed device will be considered as an Active device. You have always to do “I am here” from Sync to activate your current device where you want to open a synced file from.



Version Number Right-click menu

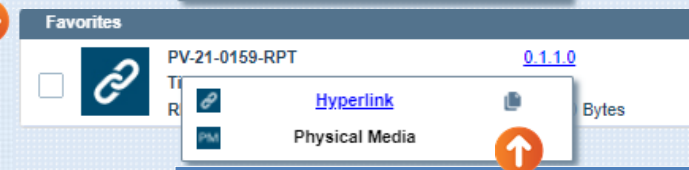
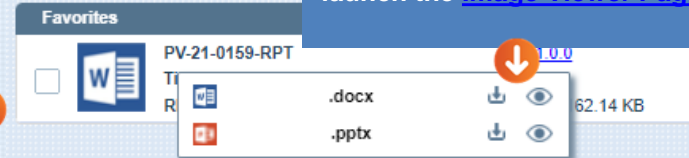


Right-click on any version link in Tina results in a dropdown list.

Right-click menu values will be determined by permission settings.

- If the user doesn't have download or view permission, that option will not appear in right-click menu list.
- Only Master and Viewable files will show under right-click menu list (based on permission).
 - If the master file is also the viewable file, then right-click menu will show only one file.
 - If the master and viewable are two different files, two files will display.
- The Hyperlink and Physical Media will also appear under the list.

Left-click on any download icon will result in the download of the file format that clicked. Left-click on the View icon will launch the [Image Viewer Page](#).



The *Copy* icon is provided to copy the URL.

Image Viewer Page

PV-21-0159-RPT Lifecycle : In Work Status : Draft Change Info : Rev 0

Title : WFL test

RID : 2739495 Version : 0.1.2.0 Size : 162.14 KB Modified : 2022/05/05

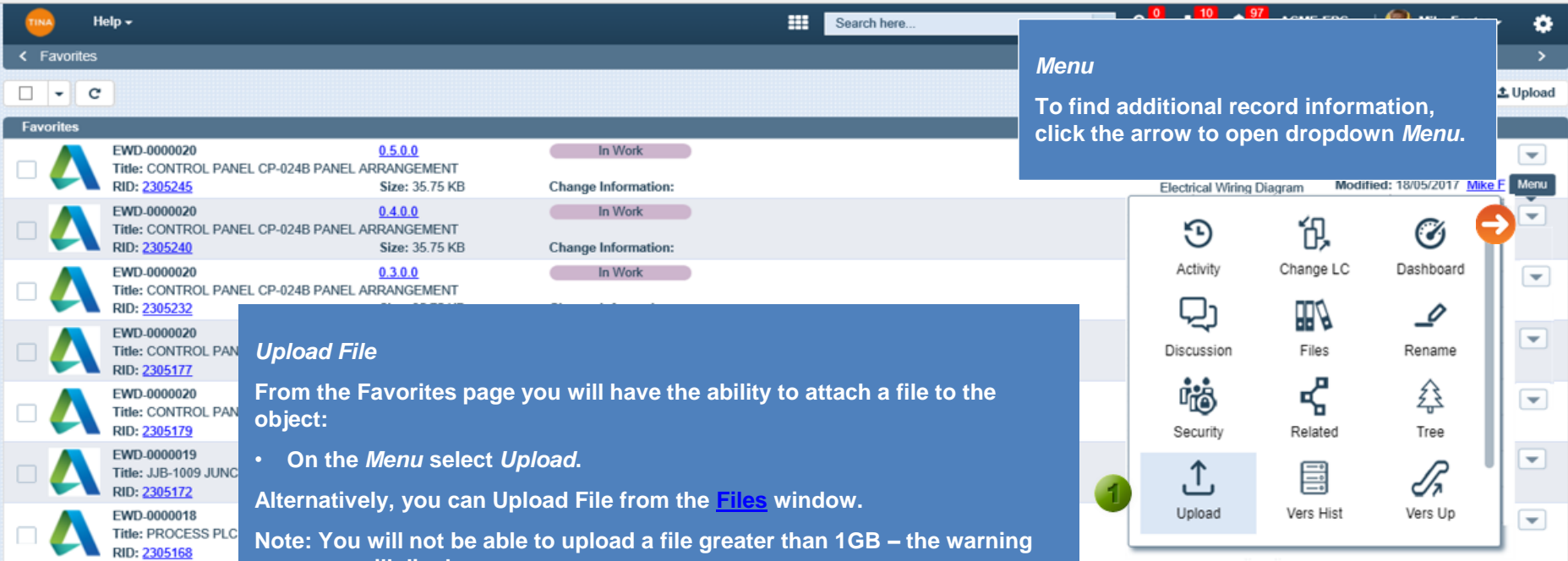
View

82% - +

↑

The header will display information as per the image selected.

Status:	Controlled
Date Issued:	DD-MM-YY
Prepared By:	
Title:	
Organization:	Cascade Aerospace Inc.
Reviewed By:	
Title:	
Organization:	Cascade Aerospace Inc.
Approved By:	
Title:	
Organization:	Cascade Aerospace Inc.
Date:	DD-MM-YY



Menu
To find additional record information, click the arrow to open dropdown *Menu*.

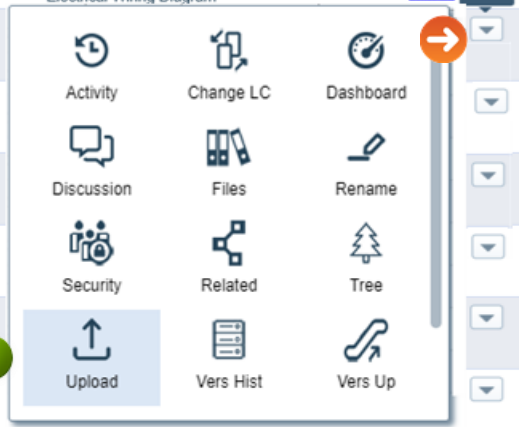
Upload File
From the Favorites page you will have the ability to attach a file to the object:

- On the *Menu* select *Upload*.

Alternatively, you can Upload File from the [Files](#) window.

Note: You will not be able to upload a file greater than 1GB – the warning message will display:

Can not upload file as file size is greater than 1 gigabytes. ✕



File Upload

Search Desktop

Organize New folder

Name	Date	Type	Size	Tags
bug lifecycle image_files	4/11/2017 2:40 PM	File folder		
MS Office Small Business 2007	5/12/2017 12:00 PM	File folder		
1	5/10/2017 1:39 PM	PNG File	94 KB	
1bug	3/30/2017 12:39 PM	PNG File	54 KB	
2bug	3/30/2017 2:38 PM	PNG File	125 KB	
3-mistake-of-my-life	3/23/2017 2:51 PM	PDF File	1,894 KB	
160_F_112075923_GaJfm93GMQuvx1XDBVYLDFDkxY3m...	5/12/2017 12:37 PM	JPG File	4 KB	
114977-magic-marker-icon-business-cursor	5/12/2017 12:43 PM	PNG File	18 KB	
asp registration	12/5/2016 1:47 PM	PDF File	7,877 KB	
bug lifecycle image	4/11/2017 2:40 PM	HTML File	69 KB	
bugggg	5/3/2017 4:45 PM	PNG File	123 KB	
captcha images	12/5/2016 1:51 PM	PDF File	3,091 KB	

File name:

All Files

Open Cancel

Browse to where you stored your document. Select file to attach and click Open.

Search here...






















ACME-EPC Mike Foster

New Upload

Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Controlled	Effective: Modified: 17/05/2017 Mike F
Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F
Template	Effective: Modified: 17/05/2017 Mike F

File upload Status bar will be displayed.

35%

Favorites										
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305245	0.5.0.0 Size: 35.75 KB	In Work	Change Information:	Controlled	Electrical Wiring Diagram	Effective: Modified: 18/05/2017 Mike F		
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305240	0.4.1.0 Size: 35.75 KB	In Work	Change Information:	Controlled	Electrical Wiring Diagram	Effective: Modified: 18/05/2017 Mike F		
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305232	0.2.0.0	In Work	Change Information:	Controlled	Electrical Wiring Diagram	Effective: Modified: 18/05/2017 Mike F		
<input type="checkbox"/>		EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305177	0.2.0.0	In Work	Change Information: Rev 0	Controlled	Electrical Wiring Diagram	Effective: 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	Controlled	Electrical Wiring Diagram	Effective: 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	Controlled	Electrical Wiring Diagram	Effective: 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	Controlled	Electrical Wiring Diagram	Effective: Modified: 17/05/2017 Mike F		

The File version will be automatically updated.



Favorites

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

Files

From the *options* dropdown *Menu* select *Files* to open the *Files* window.



Activity



Change LC



Dashboard



Discussion



Files



Rename



Security



Related



Tree



Upload



Vers Hist



Vers Up

The *Files* window will open.

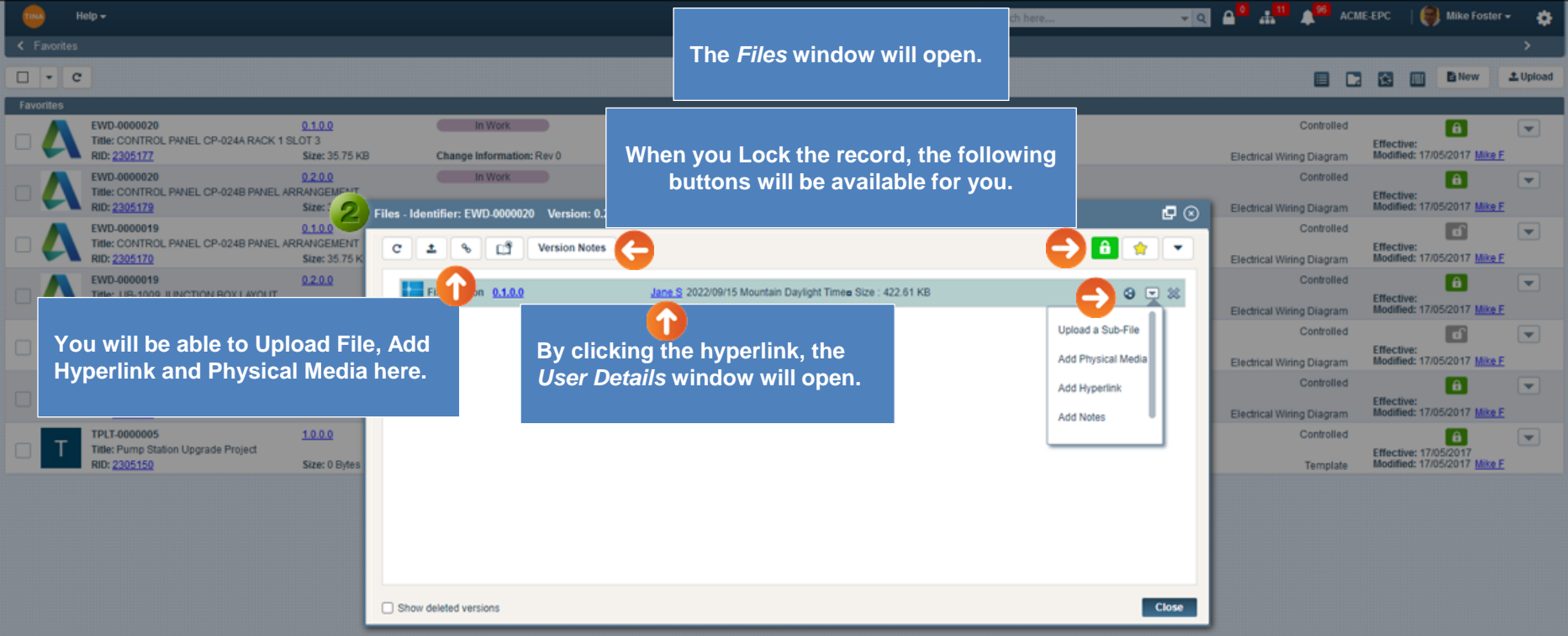
When you Lock the record, the following buttons will be available for you.

You will be able to Upload File, Add Hyperlink and Physical Media here.

By clicking the hyperlink, the *User Details* window will open.

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.



The screenshot shows a software interface with a list of favorites on the left and a version notes window in the center. The favorites list includes items like EWD-000020, EWD-000019, EWD-000018, and TPLT-000005. The version notes window is titled "Files - Identifier: EWD-000020" and shows a file version of 0.1.0.0. A date tooltip is visible, showing "2022/09/15 02:59 PM".

Identifier	Version	RID	Change Info
EWD-000020	0.1.0.0	2305177	Rev 0
EWD-000020	0.2.0.0	2305179	Rev 0
EWD-000019	0.1.0.0	2305170	Rev 0
EWD-000019	0.2.0.0	2305172	Rev 0
EWD-000018	0.1.0.0	2305166	Rev 0
EWD-000018	0.2.0.0	2305168	Rev 0
TPLT-000005	1.0.0.0	2305150	Rev 0

Version Notes window details:

- File Version: 0.1.0.0
- Author: Jane S
- Date: 2022/09/15 Mountain Daylight Time
- Size: 422.61 KB
- Tooltip: 2022/09/15 02:59 PM

Time / Time Zone

Currently, *Time and Time Zone* are available on the *Date Tooltip* menu everywhere and by default – it's your system time.

Upload a Sub-File

The Action menu contains *Upload a Sub-File* option. This will give the ability to attach a file as a subordinate file (sub-file) to the currently selected source file. Files that would be typically uploaded as a sub-file would be any PDFs or other alternate file formats that were created from the selected source file.

Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.2.0 RID: 1928642 Change Info: Rev 0

- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB
- File Version 0.1.1.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB

Show deleted versions

Close

The screenshot shows a software interface with a 'Favorites' list on the left and a main workspace on the right. The 'Favorites' list contains several entries, each with a document icon, a title, an RID, a size, and a version number. A callout box labeled '3' points to the third entry. The main workspace shows a 'Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.2' window. This window has a menu with options like 'Set as Viewable' and 'Add Notes'. A callout box points to this menu. Another callout box points to a close button (X icon) on the right side of the interface. A third callout box points to a 'Sharing Data' icon in the top right of the main workspace.

Share
You can share the file with other users. Click the *Sharing Data* icon.

Set as Viewable
You can choose what file will be downloaded from the version hyperlink. Select *Set as Viewable* from the menu dropdown list. This file will be highlighted. Document Icon will be changed accordingly.

Remove
If you wish to remove the *File link*, click the X icon.

Sub-File has been attached to the source file as a child. You can upload as many files as you wish but one file at a time.

Similar to this, you will be able to:

- Add Hyperlink, and
- Add Physical Media

to the selected file.

Item	Version	Status	Effective	Modified	By
TPLT-0000005 Title: Pump Station Upgrade Project RID: 2305150	1.0.0.0	Released	Controlled	17/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305245	0.5.0.0	Submitted	Controlled	18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305240	0.4.0.0		Controlled	18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305232	0.3.0.0		Controlled	18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305177	0.1.0.0		Controlled	18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305179	0.2.0.0		Controlled	17/05/2017	Mike F
EWD-0000019 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305170	0.1.0.0		Controlled	17/05/2017	Mike F
EWD-0000019 Title: JJB-1009 JUNCTION BOX LAYOUT RID: 2305172	0.2.0.0		Controlled	17/05/2017	Mike F
EWD-0000018 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305168	0.1.0.0		Controlled	17/05/2017	Mike F
EWD-0000018 Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P RID: 2305168	0.2.0.0		Controlled	17/05/2017	Mike F
2012006-1EF-EWD-000-0038 Title: LJB-1102 JUNCTION BOX LAYOUT RID: 1928642	0.1.2.0		Controlled	17/05/2016	Mike F
2012006-1EF-ELD-000-0004 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 1928622	0.1.5.0	Merged	Controlled	20/07/2016	Astrid M

Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.2.0 RID: 1928642 Change Info: Rev 0

Version Notes More

- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB
- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 7.92 MB
- 1. File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB
- File Version 0.1.1.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB
- File Version 0.1.0.0 Jane S 2022/09/30 Mountain Daylight Time Size : 422.61 KB

Set as Latest

The Older file version can be set as a latest. Select file Version 0.1.0.0 and click Set as Latest.

1

2

Set as Latest

Close

ID	Title	Version	Status	Change Information
TPLT-0000005 RID: 2305150	Pump Station Upgrade Project	1.0.0.0	Released	Rev 0
EWD-0000020 RID: 2305245	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.5.0.0	Submitted	
EWD-0000020 RID: 2305170	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.4.0.0		
EWD-0000019 RID: 2305172	JJB-1009 JUNCTION BOX LAYOUT	0.2.0.0		
EWD-0000018 RID: 2305168	CONTROL PANEL CP-024A RACK 1 SLOT 3	0.1.0.0		
EWD-0000018 RID: 2305168	PROCESS PLC CONTROL PANEL CP-024A 24VDC	0.2.0.0		
2012006-1EF-EWD-000-0038 RID: 1928642	LJB-1102 JUNCTION BOX LAYOUT	0.1.2.0		Rev 0
2012006-1EF-ELD-000-0004 RID: 1928622	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.1.5.0	Merged	Rev 0

Selected file has been shifted up. File version has been updated to the next sequential number (0.1.3.0) and set as a *Latest*.

Document version number has been updated accordingly.

Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.3.0 328642 Change Info: Rev 0

Version Notes | More

Delete All Older Versions

- File Version 0.1.3.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.1.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.0.0 Jane S 2022/09/30 Mountain Daylight Time Size: 422.61 KB

Show deleted versions

Close

You can Delete All Older Versions.

Help -> Favorites

Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.3.0 RID: 1928642 Change Info: Rev 0

File Version 0.1.3.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB

File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB

2. File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 7.92 MB

1. File Version 0.1.2.0 Delete

File Version 0.1.1.0

File Version 0.1.0.0

Are you sure, you want to delete all the older versions of the files?

5 Ok Cancel

Show deleted versions

Click Ok to proceed or Cancel to go back to the File Section window.

Item	Version	Status	Effective/Modified	Author
TPLT-0000005 Title: Pump Station Upgrade Project RID: 2305150	1.0.0.0	Released	Effective: 17/05/2017 Modified: 18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305245	0.5.0.0	Submitted	Effective: 18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305240	0.4.0.0	Controlled	Effective: 18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305232	0.3.0.0	Controlled	Effective: 18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305177	0.1.0.0	Controlled	Effective: 18/05/2017	Mike F
EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305179	0.2.0.0	Controlled	Effective: 17/05/2017	Mike F
EWD-0000019 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305170	0.1.0.0	Controlled	Effective: 17/05/2017	Mike F
EWD-0000019 Title: JJB-1009 JUNCTION BOX LAYOUT RID: 2305172	0.2.0.0	Controlled	Effective: 17/05/2017	Mike F
EWD-0000018 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305168	0.1.0.0	Controlled	Effective: 17/05/2017	Mike F
EWD-0000018 Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P RID: 2305168	0.2.0.0	Controlled	Effective: 17/05/2017	Mike F
2012006-1EF-EWD-000-0038 Title: LJB-1102 JUNCTION BOX LAYOUT RID: 1928642	0.1.2.0	In Work	Effective: 20/07/2016	Astrid M
2012006-1EF-ELD-000-0004 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 1928622	0.1.5.0	Merged	Effective: 20/07/2016	Mike F

ID	Title	Version	Status	Change Information	Effective/Modified	Author
TPLT-0000005	TPump Station Upgrade Project	1.0.0.0	Released	Rev 0	17/05/2017	Mike F
EWD-0000020	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.5.0.0	Submitted		18/05/2017	Mike F
EWD-0000020	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.4.0.0			18/05/2017	Mike F
EWD-0000020	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.3.0.0			18/05/2017	Mike F
EWD-0000020	CONTROL PANEL CP-024A RACK 1 SLOT 3	0.1.0.0			18/05/2017	Mike F
EWD-0000020	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.2.0.0			17/05/2017	Mike F
EWD-0000019	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.1.0.0			17/05/2017	Mike F
EWD-0000019	JJB-1009 JUNCTION BOX LAYOUT	0.2.0.0			17/05/2017	Mike F
EWD-0000018	CONTROL PANEL CP-024A RACK 1 SLOT 3	0.1.0.0			17/05/2017	Mike F
EWD-0000018	PROCESS PLC CONTROL PANEL CP-024A 24VDC P	0.2.0.0			17/05/2017	Mike F
2012006-1EF-EWD-000-0038	LJB-1102 JUNCTION BOX LAYOUT	0.1.2.0		Rev 0	20/07/2016	Astrid M
2012006-1EF-ELD-000-0004	CONTROL PANEL CP-024B PANEL ARRANGEMENT	0.1.5.0	Merged	Rev 0	20/07/2016	Mike F

Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.3.0 RID: 1928642 Change Info: Rev 0

Version Notes More

- File Version 0.1.3.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- 2. File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size: 7.92 MB
- 1. File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.1.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB
- File Version 0.1.0.0 Jane S 2022/10/12 Mountain Daylight Time Size: 422.61 KB

Show deleted versions

Close

You can Delete any file version by selecting X.

Note: If the file contains the sub-files attached, they also will be deleted.



<input type="checkbox"/>	T	TPLT-0000005 Title: Pump Station Upgrade Project RID: 2305150	1.0.0.0	Released	Controlled	Effective: 17/05/2017 Modified: 18/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305245	0.5.0.0	Submitted	Controlled	Effective: 18/05/2017 Modified: 18/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305240	0.4.0.0		Controlled	Effective: 18/05/2017 Modified: 18/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305232	0.3.0.0		Controlled	Effective: 18/05/2017 Modified: 18/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000020 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305177	0.1.0.0		Controlled	Effective: 18/05/2017 Modified: 18/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000020 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305172	0.2.0.0		Controlled	Effective: 17/05/2017 Modified: 17/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000019 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 2305170	0.1.0.0		Controlled	Effective: 17/05/2017 Modified: 17/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000019 Title: JJB-1009 JUNCTION BOX LAYOUT RID: 2305172	0.2.0.0		Controlled	Effective: 17/05/2017 Modified: 17/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000018 Title: CONTROL PANEL CP-024A RACK 1 SLOT 3 RID: 2305168	0.1.0.0		Controlled	Effective: 17/05/2017 Modified: 17/05/2017 Mike F
<input type="checkbox"/>	A	EWD-0000018 Title: PROCESS PLC CONTROL PANEL CP-024A 24VDC P RID: 2305168	0.2.0.0		Controlled	Effective: 17/05/2017 Modified: 17/05/2017 Mike F
<input type="checkbox"/>	A	2012006-1EF-EWD-000-0038 Title: LJB-1102 JUNCTION BOX LAYOUT RID: 1928642	0.1.2.0		Controlled	Effective: 20/07/2016 Modified: 20/07/2016 Astrid M
<input type="checkbox"/>	A	2012006-1EF-ELD-000-0004 Title: CONTROL PANEL CP-024B PANEL ARRANGEMENT RID: 1928622	0.1.5.0	Merged	Controlled	Effective: 20/07/2016 Modified: 20/07/2016 Mike F

Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.3.0 RID: 1928642 Change Info: Rev 0

Version Notes More

- File Version 0.1.3.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB
- File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 422.61 KB
- 2. File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 7.92 MB
- 1. File Version 0.1.2.0 Jane S 2022/10/12 Mountain Daylight Time Size : 7.92 MB
- File Version 0.1.1.0 Jane S 2022/10/12 Mountain Daylight Time Size : 7.92 MB
- File Version 0.1.0.0 Jane S 2022/10/12 Mountain Daylight Time Size : 7.92 MB

Delete

Are you sure, you want to delete the file version 0.1.2.0?

Ok Cancel

Show deleted versions Close

Click Ok to proceed or Cancel to go back to the Files window.

When downloading the deleted version, the warning message will display.

Version 0.1.2.0 and its sub-files have been deleted.

Files - Identifier: 2012006-1EF-EVD-000-0038 Version: 0.1.3.0 RID: 1928642 Change Info: Rev 0

You can not download the file as the record is deleted

File Version	0.1.3.0	Jane S	2022/10/12 Mountain Daylight Time	Size : 422.61 KB
File Version	0.1.2.0	Jane S	2022/10/12 Mountain Daylight Time	Size : 422.61 KB
2. File Version	0.1.2.0	Jane S	2022/10/12 Mountain Daylight Time	Size : 7.92 MB
1. File Version	0.1.2.0	Jane S	2022/10/12 Mountain Daylight Time	Size : 422.61 KB
File Version	0.1.1.0	Jane S	2022/10/12 Mountain Daylight Time	Size : 422.61 KB
File Version	0.1.0.0	Jane S	2022/09/30 Mountain Daylight Time	Size : 422.61 KB

Show deleted versions

Close

- For the Deleted files, red Trash icon is showing.
- The context menu is not available for deleted file versions.

To see deleted file versions, check the "Show deleted versions" box.

File Version 0.1.3.0 Jane.S 2022/10/12 Mountain Daylight Time Size : 422.61 KB

File Version 0.1.1.0 Jane.S 2022/10/12 Mountain Daylight Time Size : 422.61 KB

File Version 0.1.0.0 Jane.S 2022/09/30 Mountain Daylight Time Size : 422.61 KB

Upload a Sub-File

Add Physical Media

Add Hyperlink

Add Notes

Add Notes

Add Notes option will be available on the File version context Menu. It will also be available on Physical Media and Hyperlink versions.

Note: No Security check for the Add Notes functionality. Any user can add notes, if user has Locked the record.

The screenshot displays a software interface with a list of files on the left and a list of electrical wiring diagrams on the right. A central window titled "Files - Identifier: 2012006-1EF-EWD-000-0038 Version: 0.1.3.0 RID: 1928642 Change Info: Rev 0" is open. This window contains a table of file versions:

File Version	0.1.3.0	0.1.2.0	0.1.1.0	0.1.0.0	
Jane S	2022/10/12 Mountain Daylight Time	Jane S	2022/10/12 Mountain Daylight Time	Jane S	2022/10/12 Mountain Daylight Time
Size	422.61 KB	422.61 KB	422.61 KB	422.61 KB	

Below the table, a "Notes for version 1" dialog box is open, containing the text: "The latest master file has been updated. Can be Released." The dialog has a "Save & Close" button and a "Close" button. A blue callout box with an arrow points to the "Notes for version 1" dialog, and another blue callout box points to the "Save & Close" button.

The Notes for the version window will open.

By entering notes, the Save & Close button will be activated. Click it to save your notes.

Click the *Version Notes* button to open the *Notes Summary* window to review all notes.

The *Version Notes* icon will appear.

You can Add Notes to the sub-file.

Edit / Delete Notes

If you click the *Version Notes* icon, the *Notes* window will open. You will be able to Edit or Delete this note.

Note: *Version Notes* editability depends on the user's security permission:

- If user has no security of "Manage file Notes", then notes will not be editable for that user, or
- If this record is locked by someone else, notes will not be editable as well.

Note:
Notes will also copy after perform *Set as Latest*.

Notes Summary
The *Notes Summary* window will open.

Notes Summary

Version	Uploaded By	Notes
0.1.3.0	Jane S	The latest master file has been updated. Can be Released.
0.1.3.0	Jane S	PDF created. Can be uploaded.
0.1.1.0		Your Notes Here
0.1.0.0		Your Notes Here

Go to page: 1 Show rows: 10 1-4 of 4

Save & Close Close

You will be able to download any file version from here or open the *User Details* window.

You will be able to Add, Edit or Delete notes from this window as well.
Note: Notes editability depends on the user's security permission and Lock of record.

Note Events will be shown in the *Activity History* window:

- Add Notes
- Edit Notes
- Delete Notes

Activity History - Identifier: D

Type	Lifecycle	Event	Information	By Who	Date
	In Work	Edit Notes	Notes Edited	Jane Smith	2022/10/13
	In Work	Delete Notes	Notes Deleted	Jane Smith	2022/10/13
	In Work	Add Notes	Notes Added	Jane Smith	2022/10/13
	In Work	Add Notes	Notes Added	Jane Smith	2022/10/13

More

AREP-0000017
Title : Hyperlink
RID : 2924343

Lifecycle : In Work Status : Controlled Change Info

Set as Template Save Correction Mode Cancel Action

Edit Hyperlink

Files- Identifier: AREP-0000017 Version: 0.1.0.0 RID: 2924343 Change Info: Rev

Version Notes

Hyperlink 0.1.0.0 Jane S 2022/10/13 Mountain Daylight Time Size : 0 B

You can edit Hyperlink. By selecting this option, the Edit Hyperlink window will open.

- Add Hyperlink
- Edit Hyperlink
- Add Notes
- Set as Viewable

Show deleted versions

Close

Properties

Common Information

Project Planning & Management Information

Last Modified

Release Date

Start - Sched

Release - Sched

Modified : 2022/10/13 Jane S

AREP-0000017 Lifecycle: In Work Status: C

Title: Hyperlink RID: 2924343 Modified: 2022/10/13 Jane_S

The Edit Hyperlink window will open.

Files- Identifier: AREP-0000017 Version: 0.1.0

Hyperlink 0.1.0.0 Jane_S 2022/10/13 Mountain Daylight Time Size: 0 B

Edit Hyperlink

1 Text To Display * Tina5s Home Page

Link To * https Tina5s.com

https://Tina5s.com

3 Save Cancel

You can update *Text To Display* to replace the default (Hyperlink) value.

Click Save to proceed.

Files- Identifier: AREP-0000017 Version: 0.1.0.0 RID: 2924343 Change Info: Rev

Hyperlink updated successfully

Tina5s Home Page 0.1.0.0 Jane_S 2022/10/13 Mountain Daylight Time Size: 0 B

You can open any pop-up window in a separate page by clicking this icon.

The hyperlink has been updated accordingly. Success message displayed.

To keep you oriented, the page type will show in the Breadcrumb and the browser page tab.

AREP-0000017



Title : Hyperlink

RID : [2924343](#)

Version : [0.1.0.0](#)

Size : 0 Bytes

Rev



Modified : 2022/10/13

Version Notes

Save

[Tina5s Home Page](#) [0.1.0.0](#) [Jane S](#) 2022/10/13 Mountain Daylight Time Size : 0 B

The *Files* window will open in a separate page.

Show deleted versions

Favorites Show files in subfolders

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

	Type	Lock	Record ID	Internal ID	Title	Lifecycle State	Status	Version	Category	Author Activity	Workflow	Subfiles	Where Used	Tree	Menu	Chatter Factor	Drawin
<input type="checkbox"/>			2924310	DWG-PROC-0000003	Block Flow Diagram (BFD) - COPY	In Work	Controlled	0.1.4.0	Block Flow Diagram	4							
<input type="checkbox"/>			2924338	AREP-0000012	WhereUsedResultSet					1						0	
<input type="checkbox"/>			2924341	3DM-CSA-0000003	3D CAD Model					1						0	
<input type="checkbox"/>			2924340	TPLT-0000004	Admin User					0						0	
<input type="checkbox"/>			2924336	AREP-0000012	WhereUsedResultSet					1						0	
<input type="checkbox"/>			2924333	3DM-CSA-0000003	3D CAD Model					1						0	
<input type="checkbox"/>			2924311	AREP-0000007	WhereUsedResultSet - COPY(2)	Merged	Controlled	0.1.0.0	Aero Report	1						0	
<input type="checkbox"/>			2924275	AREP-0000005	WhereUsedResultSet	Merged	Controlled	0.1.0.0	Aero Report	1						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 Model	1						0	
<input type="checkbox"/>			2924268	DWG-PROC-0000001	Block Flow Diagram (BFD)	In Work	Controlled	0.1.0.0	Block Flow Diagram	1						0	

Activity History
 If you wish to review the object's history, select **Activity History** link from the Option menu.

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

Activity History window will open.

Save Layout Lock Star Options

- Export
 - Excel
 - CSV

Type	Record ID	Version	Lifecycle	Event	Information	By Who	Date	Notes	D	Device L
	2924310	0.1.3.0	In Work	Edit Notes	Notes Edited	Jane Smith	2022/10/13			
	2924310	0.1.1.0	In Work	Delete Notes	Notes Deleted					
	2924310	0.1.1.0	In Work	Add Notes	Notes Added					
	2924310	0.1.3.0	In Work	Add Notes	Notes Added					
	2924310	0.1.3.0	In Work	File Upload	SubFile 3 Uploaded.					
	2924310	0.1.3.0	In Work	Add Notes	Notes Added					
	2924310	0.1.4.0	In Work	File Delete	File version has been deleted					
	2924310	0.1.4.0	In Work	Add Notes	Notes Added					
	2924310	0.1.4.0	In Work	File Upload	File uploaded					
	2924310	0.1.2.0	In Work	File Download	The sub file 2 : pptx has been downloaded.					
	2924310	0.1.2.0	In Work	File Download	The sub file 1 : dwg has been downloaded.					
	2924310	0.1.2.0	In Work	File Download	The file : dwg has been downloaded.					
	2924310	0.1.2.0	In Work	File Delete	File version has been deleted					
	2924310	0.1.3.0	In Work	Set A						
	2924310	0.1.2.0	In Work	File U		Jane Smith	2022/10/12			
	2924310	0.1.2.0	In Work	File U		Jane Smith	2022/10/12			
	2924310	0.1.2.0	In Work	File U		Jane Smith	2022/10/12			
	2924310	0.1.4.0	In Work	File Upload	File uploaded.	Jane Smith	2022/10/13			

The following buttons will be available in the *Activity History* window:

- **Export** – The activity history can be exported by clicking the *Export* button. Select the export format (*Excel* or *CSV*).
- **Select Columns** - If you wish to customize activity history window, click the *Select Columns* button to open Column Chooser window.
- **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.

Clicking hyperlink will open the User Details window.




Close

Related To	Related From
Upload Document (0 Record)	
Upload Ancillary Files (0 Record)	
Xref (0 Record)	

The dropdown *Menu* is available from any window.

Related Items Window



The system will be able to relate documents to each other. By clicking the *Related* link from the Menu, the *Related Items* window will open. The following Tabs will display:


- *Related To Tab* - The Related To Tab describes information between the current object and another object. It shows direct relationship from the source to destination. The information on a *Related To Tab* is editable.
- *Related From Tab* - the information is not editable on this tab. It shows reverse relationship from destination to the source and describes which data items are related to another data items.

Show Deleted Records

Save Save and Close Cancel

<input type="checkbox"/>	Type	Lock	Record ID	Internal ID	Title	Lifecycle State	Version	Menu	Size	R
<input type="checkbox"/>			2924310 (5)	DWG-PROC-0000003	Block Flow Diagram (BFD) - COPY(1) - COPY	In Work	0.1.3.0		422.61 KB	
<input type="checkbox"/>			2924329 (0)	AREP-0000001	Directional Stability Tests at M=1.57 on a 1-80 Scale Model of the Avro	In Work	1.1.0.0		0 Bytes	
<input type="checkbox"/>			2924311 (0)	AREP-0000007	WhereUsedResultSet - COPY(2)	Merged	0.1.0.0		3.54 KB	
<input checked="" type="checkbox"/>			2924313 (2)	AREP-0000009	Directional Stability Tests at M=1.57 on a 1-80 Scale Model of the Avro				1.78 MB	
<input type="checkbox"/>			2924325 (0)	AREP-0000014	Report_Functional					
<input type="checkbox"/>			2924326 (0)	AREP-0000015	Aero Report - COPY					

Document Tree



The system will provide functionality to relate documents in a hierarchal manner and show the document relationship in a tree-type structure.

By default, the *Document Tree* is showing in a separate window and in collapsed form. Click +/- icon to expand it.

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

The *Menu* is available for any record in the Tree.

Where Used - Identifier: AREP-0000007 Version: 0.1.0.0 RID: 2924311 Change Info: Rev 0

Save Layout Export

Type	Record ID	Lifecycle State	Size	Category Description	Status	Menu	Lock	Branch RID	Branch Version	Use Count	Author Activity	Chatter F...	Related Fron
	2924310	In Work	422.61 KB	Bl...				2924311	0.1.0.0	1	4	0	No

- Activity
- Change LC
- Dashboard
- Discussion
- Files
- Security
- Related
- Tree**
- Vers Hist
- Vers Up
- Workflow

Where Used window

The system will provide a 'where-used' functionality to show any document tree in which a document is used. Where Used data information is not editable.

- Same Document object can be in several Document trees - Where Used will have the ability to display all the trees where it can be found (based on document's object thread).
- Use Count will show how many times this record is included in each tree. The count number will be a hyperlink that opens a tree with this record highlighted when clicked.

Show Deleted Records

Close

Workflow - Identifier: ECR-0001409 Version:0.1.0.0 RID:2915496 Change Info: Rev 0


Workflow management icons: refresh, user, add, help

Advisory

Workflow control buttons: Reset, Template, lock, star, settings, dropdown

Step	Assigned Role	Assignee	Action Req'd	Menu	Assigned Date	Duration	Due Date	Version	Response	Response
1	All Workflow Users	Jane Smith	Prepare	...		2 Days		0.1.0.0	None	
2	Canada - Project Manager	Select	Release	...		Days		0.1.0.0	None	
3	All Workflow Users	Jane Smith	Notify	...		Days		0.1.0.0	None	
3	All Workflow Users	Aileen Kw...						0.1.0.0	None	

Workflow window



The system will provide workflow functionality to assign documents to other users for activities related to that document. The Workflow process will include the ability to create a chain of 'Action Items', each assigned to a User or a User Group. As the Workflow progresses, the subsequent Action Items will be activated step by step, requiring input from the assigned User/User Group at each step. The system will have functionality to email a user when a document is added to their workflow.

Planned Completion:

Save Save and Close Close

The Version History window will display all Versions /Source Versions of the object.

Drag a column and drop it here to group

Type	Version	Source Version	Record ID	Internal ID	Title	Lifecycle ...	Size	Category	Created Date	Lock	Menu	Workflow	SI (D
	0.1.5.0	0.1.3.0	2924310	DWG-PROC-0000003	Block Flow Diagram	In Work	443.21 KB	Block Flow Diagram (BFD)	2022/09/30				0
	0.1.5.0	0.1.3.0	2924310	DWG-PROC-0000003	Block Flow Diagram	In Work	9.62 MB	Block Flow Diagram (BFD)	2022/09/30				0
	0.1.4.0	0.1.3.0	2924310	DWG-PROC-0000003	Block Flow Diagram	In Work	7.92 MB	Block Flow Diagram (BFD)	2022/09/30				0
	0.1.3.0	0.1.0.0	2924310	DWG-PROC-0000003	Block Flow Diagram	In Work	443.21 KB	Block Flow Diagram (BFD)	2022/09/30				0
	0.1.3.0	0.1.0.0	2924310	DWG-PROC-0000003	Block Flow Diagram	In Work	422.61 KB	Block Flow Diagram (BFD)	2022/09/30				0
	0.1.2.0	0.1.1.0	2924310	DWG-PRO	)			)	2022/09/30				0
	0.1.2.0	0.1.1.0	2924310	DWG-PRO	)			)	2022/09/30				0
	0.1.2.0	0.1.1.0	2924310	DWG-PRO	)			)	2022/09/30				0
	0.1.1.0	0.1.0.0	2924310	DWG-PRO	)			)	2022/09/30				0
	0.1.0.0	0.1.0.0	2924310	DWG-PRO	)			)	2022/09/30				0

Version History window



The Version History is available for all categories. The information on this tab is not editable.

- The Hyperlink in the RID column will provide the ability to bring up the Properties screen.
- The Hyperlink in the Version column will provide the ability to download file for the corresponding version object.

Close

Attribute | Security | Rules | Access Control | Function


Users and Roles | Access Control Levels

Set Security Using: Default [i] [←]

Roles & Users	Grant Access Level [i]	Source	
Drafting	OWNER	Added	<input type="checkbox"/>
Construction	CONSUMERS	Default	<input type="checkbox"/>
Engineering			<input type="checkbox"/>
Operations			<input type="checkbox"/>
PMO			<input type="checkbox"/>
Procurement			<input type="checkbox"/>
Quality			<input type="checkbox"/>
Regulatory			<input type="checkbox"/>

Add Roles/Users | Save | Save and Close | Cancel

Security window

 Security

Security is available for all document categories. This is where you set the security settings for a record. Security settings can be selected from the **Set Security Using** dropdown list that contains the following options:

- Default** (inherited parent object security). For this security selection type all buttons will be disabled.

Note: *Cumulative Security* can be added if security setting is Default. You can add Users and Roles in addition to the inherited security.

- Custom** (edit parent security). For this security selection type all buttons will be enabled. By using the *Custom* security, you can edit/modify the security settings and can grant Access Level accordingly.

More

Set as Template Save Correction Mode Cancel Action

AREP-0000017 Lifecycle: Released Status: Controlled Change Info: Rev
Title: Hyperlink
RID: 2924343 Category: Aero Report Version: 1.0.0.0 Size: 0 Bytes

Properties

Table with 2 columns: Property Name, Value. Rows include Internal ID (AREP-0000017), External ID, Thread ID (2924343), Record ID (2924343).

Common Information

Table with 2 columns: Field Name, Value. Rows include Title (Hyperlink), Category (Aero Report), Project (Enter Keyword), Revision (Rev), Issued Purpose (Select Value), Description, Last Modified, Release Date (2022/10/12 06:00:00 PM).

Project Planning & Management Information

Table with 2 columns: Field Name, Value. Row includes Start - Sched.

Activity Dashboard Discussion Files Security Related Tree Vers Hist Vers Up Where Workflow

Version Up
You can Version Up document record.
• By Selecting Version Up, the Versioned Up record will be created and opened in new tab.
Note: You have to Lock the object to version it up.

AREP-0000017 Lifecycle: In Work Status: Controlled Change Info: Rev
Title: Hyperlink
RID: 2924344 Category: Aero Report Version: 1.1.0.0 Size: 0 Bytes
Modified: 2022/10/13 Jane S

New draft record is created, it is given the version number 1.1.0.0 and the Lifecycle State In Work.

Properties table with columns: Internal, External, Thread ID, Record ID. Values: 2924343, 2924344.

Common Information section with fields: Title (Hyperlink), Category (Aero Report), Project (filter list), Revision (Rev), Issued Purpose (Select Value), Description, Last Modified (2022/10/13 02:53:30 PM), Release Date.

Project Planning & Management Information section with field: Start - Sched.

More

Set as Template Save Correction Mode Cancel Action

AREP-0000017 Lifecycle: In Work Status: Controlled Change info: Rev

Title: Hyperlink

- Cancelled
- In Work
- On Hold
- Released
- Submitted

Version: 1.1.0.0 Size: 0 Bytes

Click Save.

Modified: 2022/10/13 Jane S

From the Lifecycle pick list select Released lifecycle state and update the Status.

Internal ID: AREP-0000017 External ID: Thread ID: 2924343 Record ID: 2924344

Set to Released You should manually change In Work to Released. You have to Lock the object to be able to Release it.

Common Information

Title: Hyperlink Category: Aero Report

Favorites

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

Type	Lock	Menu	Record...	Internal ID	Title	Lifecycle State	Status	Version
			2924344	AREP-0000017	Hyperlink	Released	Controlled	2.0.0.0
			2924343	AREP-0000017	Hyperlink	Superseded	Controlled	1.0.0.0

The Lifecycle State has been changed to Released and Version number was incremented to Final (2.0.0.0). If this branch has already Released version, it will become Superseded.

Last Modified: 2022/10/13 02:53:30 PM

Release Date: 2022/10/13 03:03:01 PM

Released Date has been set to the current server date / time.

Change Info rules

This is only applicable to A&D Document categories:

1. When a new document is created - *Change Info* will be set to *Rev 0* value.
2. *Change Info* value will not be changed during Lifecycle updates (change Lifecycle via the pick list).
3. Upon *Draft* (to In Work) version up the numerical part of *Change Info* will be incremented by one (1) only if:
 - *Change Info* entry is in Rev Integer format ("Rev"-space-Integer Number).

For example, if the field value is Rev 1, upon Draft (to In Work) version up it will become Rev 2. If the value Rev 11, it will become Rev 12.

4. *Change Info* field is editable based on standard Properties screen settings - authorized user can change entry to any desired value.
5. If *Change Info* value is different than format described above ("Rev"-space-Integer Number), then it is not affected during *Draft* (to In Work) version up.

0054	Lifecycle	In Work	Status	Controlled	Change Info :	Rev 0		
Title :	iOS BNs	1				↑		
RID :	2229423	Category :	Quality Assurance Form	Version :	0.1.0.0	←	Size :	0 Bytes

0054	Lifecycle	Released	Status	Controlled	Change Info :	Rev 0		
Title :	iOS BNs	2				↑		
RID :	2229423	Category :	Quality Assurance Form	Version :	1.0.0.0	←	Size :	0 Bytes

1EF-EWD-000-0012	Lifecycle	In Work	Status	Controlled	Change Info :	Rev 1		
Title :	PROCESS PLC CONTROL	3				↑		
RID :	2166830	Category :	Electrical Wiring Diagram	Version :	1.1.0.0	←	Size :	35.75 KB

2557	Lifecycle	Released	Status	Controlled	Change Info :	Rev A		
Title :	New Network issues list	4				↑		
RID :	2272818	Category :	Document	Version :	1.0.0.0	←	Size :	0 Bytes

2559	Lifecycle	In Work	Status	Controlled	Change Info :	Rev A		
Title :	Document for testing	5				↑		
RID :	2285178	Category :	Document	Version :	1.1.0.0	←	Size :	0 Bytes