

Section 2

My Favorites

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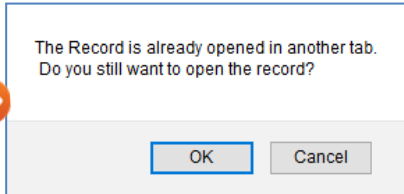
[Supported File Types](#)

Under *Favorites* you will find all the objects which are locked by you or linked to your Favorites.
Note:
Locking/Unlocking Objects and Favorites are Configurable options in the *My Default Settings* control.

Click the Lock icon to see all objects own by you.*

From the lock icon you will get info about object's ownership.

To open the object record, click the RID Number. The object's Properties screen will open in a separate web page.
The application will allow you to have the same record open twice. The confirmation message will display with OK and Cancel options.
Note: To keep you oriented, the page type "*Properties*" will show in the Breadcrumb and in the browser page tab.



Type	Life	Lifecycle State	Category	Workflow	Release Date	Modified Date	Selection Status	Locked By
		September 01 2022	Agenda	2 of 3		2022/09/26		
		October 13 2022	Agenda	3 of 3		2022/09/26		Jane Smi
		Enterprise Change Request Form (ECR)	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21		Jane Smi
		2915497 ECR-0001409 Enterprise Change Request Form (ECR)	Enterprise Change Request	2 of 3		2022/09/21		
		2915494 DOC_AGD-0010161 Report_Functional - COPY	Agenda	1 of 3		2022/09/21		Iryna Mor
		2915492 DOC_AGD-0010160 Report_Functional	Agenda	2 of 3		2022/09/21		

TINA Help Search here AWAREBASE-CORP Jane Smith

< Favorites

Grid Layout: Favorites Export New Upload

Favorites Show files in subfolders

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

Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecycle State	Category	Workflow	Release Date	Modified Date	Selection Status	Locked By
			2915593	DOC_AGD-0010163	Bi-Weekly Mod Meeting Agenda - Septemb	0.1.1.0	In Work	Agenda	2 of 3		2022/09/26		
			2915591	DOC_AGD-0010162	Bi-Weekly Mod Meeting Agenda - 13 Octob	0.1.0.0	In Work	Agenda	3 of 3		2022/09/26		Jane Smr
			2915496	ECR-0001409	Enterprise Change Request Form (ECR)	1.0.0.0	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21		Jane Smi
			2915497	ECR-0001409	Enterprise Change Request Form (ECR)	0.2.0.0	Obsolete	Enterprise Change Request	2 of 3		2022/09/21		
			2915494	DOC_AGD-0010161	Report_Fu				1 of 3		2022/09/21		
			2915492	DOC_AGD-0010160	Report_Fu				2 of 3		2022/09/21		

Redirect

A later revision is available in Tina. What would you like to do?

Redirect me to the latest revision

Open this revision (do not redirect me to the latest)

Ok Close

Note: if you try to open an Obsolete or Superseded document record, you will get a message asking if you want to open the latest document version.

Go back to [Section 2: My Favorites](#) or continue. Go to page: 1 Show rows: 50 1-6 of 6

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

<input type="checkbox"/>	Type	Lock	Menu	Record Id...	Primary Identifier					Release Date	Modified Date	Selection Status	Locked By	
<input type="checkbox"/>				2915593	DOC_AGD-0010163						2022/09/26			
<input type="checkbox"/>				2915591	DOC_AGD-0010162	Bi-Weekly Mod Meeting Agenda - 13 Octo	0.1.0.0	In Work	Agenda	3 of 3		2022/09/26		Jane Smi
<input type="checkbox"/>				2915496	ECR-0001409	Enterprise Change Request Form (ECR)	1.0.0.0	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21		Jane Smi
<input type="checkbox"/>				2915497	ECR-0001409	Enterprise Change Request Form (ECR)	0.2.0.0	Obsolete	Enterprise Change Request	2 of 3		2022/09/21		
<input type="checkbox"/>				2915494	DOC_AGD-0010161	Report_Functional - COPY	0.1.0.0	In Work	Agenda	1 of 3		2022/09/21		Iryna Mor
<input type="checkbox"/>				2915492	DOC_AGD-0010160	Report_Functional	0.1.0.0	In Work	Agenda	2 of 3		2022/09/21		

Click to Download



To Download a document File, click the Version Number:

- Left-click on any version link will result in View or Download per the user's config in *My Settings*.
- [Right-click](#) on any version link results in a dropdown list with a viewable file available to download.

In *My Settings*, you can specify the [Hover Over Version Number](#) behavior.

Version Number Right-click menu

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

Type	Lock	Menu	Record Id...	Version	Lifecycle State	Category	Workflow	Release Date	Modified Date	Selection Status	Locked By
			2915591	0.1.1.0	In Work	Agenda	3 of 3		2022/09/29		Jane Smi
			2915593	0.1.1.0	In Work	Agenda	2 of 3		2022/09/26		
			2915496	1.0.0.0	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21		Jane Smi
			2915497	ECR-0001409	Enterprise Change Request Form (ECR)	Enterprise Change Request	2 of 3				
			2915494	DOC_AGD-0010161	Report_Functional - COPY	Agenda	1 of 3				
			2915492	DOC_AGD-0010160	Report_Functional	Agenda	2 of 3				

Right-click on any version link in Tina results in a dropdown 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](#).

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.

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

Type	Lock	Menu	Record Id...	Primary Identifier
			2915591	DOC_AGD-0010162
			2915593	DOC_AGD-0010163
			2915496	ECR-0001409
			2915497	ECR-0001409

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

Type	Lock	Menu	Record Id...	Primary Identifier
			2915591	DOC_AGD-0010162
			2915593	DOC_AGD-0010163
			2915496	ECR-0001409

The Copy icon is provided to copy the URL.

↑

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

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

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

	Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version						
<input type="checkbox"/>				2915593	DOC_AGD-0010163	Bi-Weekly Mod Meeting Agenda - Septemb	0.1.1.0						
<input type="checkbox"/>				2915591	DOC_AGD-0010162	Bi-Weekly Mod Meeting Agenda - 13 Octob	0.1.0.0	In Work	Agenda	3 of 3		2022/09/26	Jane Smi
<input type="checkbox"/>				2915496	ECR-0001409	Enterprise Change Request Form (ECR)	1.0.0.0	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21	Jane Smi
<input type="checkbox"/>				2915497	ECR-0001409	Enterprise Change Request Form (ECR)	0.2.0.0	Obsolete	Enterprise Change Request	2 of 3		2022/09/21	
<input type="checkbox"/>				2915494	DOC_AGD-0010161	Report_Functional - COPY	0.1.0.0	In Work	Agenda	1 of 3		2022/09/21	Iryna Mor
<input type="checkbox"/>				2915492	DOC_AGD-0010160	Report_Functional	0.1.0.0	In Work	Agenda	2 of 3		2022/09/21	

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

	Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecy
<input type="checkbox"/>				2915593	DOC_AGD-0010163	Bi-Weekly Mod Meeting Agenda - Septemb	0.1.1.0	In W
<input type="checkbox"/>				2915591	DOC_AGD-0010162	Bi-Weekly Mod Meeting Agenda - 13 Octob	.docx	
<input type="checkbox"/>				2915496	ECR-0001409	Enterprise Change Request Form (ECR)	1.0.0.0	Released

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

Multi-Select Download

2 Items selected.

Download icon

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

Choose Version Type

What would you like to download?

Master Versions

Viewable Versions

Download Cancel

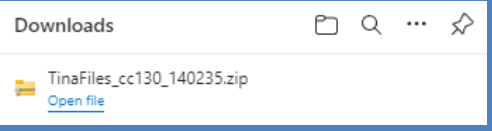
Modified Date	Selection Status	Locked By
2022/09/29		Jane Smi
2022/09/26	✓	Jane Smi
2022/09/21	✓	Jane Smi
2022/09/21		
2022/09/21		Iryna Mor
2022/09/21		

Drag a column

Type	Me	Me	ge	ge	
<input checked="" type="checkbox"/>		2915494	DOC_AGD-0010161	0.1.0.0	Report_Functional
<input checked="" type="checkbox"/>		2915492	DOC_AGD-0010160	0.1.0.0	Report_Functional

If you have permissions to download all selected files, the following blue message will display:

“Check your Downloads folder or browser tray for a zipped folder containing all selected files you are permitted to download”.



You do not have permission to download the selected files.

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

“You don't have permissions to download the selected files”.

Favorites

Hover Over Version Number

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

	Type	Lock	Menu	Record Id...	Primary Identifier	Version
<input type="checkbox"/>				2915591	DOC_AGD-0010162	0.1.1.0
<input type="checkbox"/>				2915593	DOC_AGD-0010163	0.1.1.0
<input type="checkbox"/>				2915496	ECR-0001409	1.0.0.0
<input type="checkbox"/>				2915497	ECR-0001409	0.2.0.0
<input type="checkbox"/>				2915494	DOC_AGD-0010161	0.1.0.0

Preview

(RID: 2915494)

Date	Modified Date	Selection Status	Locked By
	2022/09/29		Jane Smi
	2022/09/26		Jane Smi
27	2022/09/21		Jane Smi
	2022/09/21		Iryna Mor
	2022/09/21		

Thumbnail Viewer Behavior

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

- When hovering over the version number, show a thumbnail Preview of the file.

Note: If the file is missing or the record doesn't have a file attached, *Image Unavailable* will display in the Preview window.



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

Go back to [Section 2: My Favorites](#) or continue.

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

Type	Lock	Menu	Record Id...	Primary Identifier	Version	Title	Lifecycle State	Category	Workflow	Release Date	Modified Date	Selection Status	Locked By
			2915591	DOC_AGD-0010162	0.1.1.0	Bi-Weekly Mod Meeting Agenda - 13 Octob	In Work	Agenda	3 of 3		2022/09/29		Jane Smi
						Weekly Mod Meeting Agenda - Septemb	In Work	Agenda	2 of 3		2022/09/26		Jane Smi
						Enterprise Change Request Form (ECR)	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21		Jane Smi
						Enterprise Change Request Form (ECR)	Obsolete	Enterprise Change Request	2 of 3		2022/09/21		
						ort_Functional - COPY	In Work	Agenda	1 of 3		2022/09/21		Iryna Mor
						ort_Functional	In Work	Agenda	2 of 3		2022/09/21		

Discussion

Files

Rename

Security

Related

Tree

Upload

Vers Hist

Vers Up

Where

Workflow

Menu
 Dropdown *Menu* lists all the information you can open on selected Object/Folder, depending on category type and security settings.

Clicking the Tina logo, the Favorites page will be loaded.

ECR-0001409

Lifecycle : Released

Status : Controlled

Change Info : Rev 0



Title : Enterprise Change Request Form (ECR)

DWG

RID : 2915405

Category : Enterprise Change Request

Version : 1.0.0.0

Size : 1.47 MB

Properties



The *Properties* page will display object's metadata.

General Information

Record Identifier : 2915405

Title : Enterprise Change Request Form (ECR)

Primary Identifier : ECR-0001409

Category : Enterprise Change Request

Version : 1.0.0.0

Project : Enter Keyword(s) to filter list

Notes

Description : QAF-00005 1.5

Created Date : 2022/09/21 10:14:55 AM

Created By : Jane Smith

Modified Date : 2022/09/21 10:17:12 AM

Modified By : Jane Smith

Scheduled Release Date

Release Date : 2022/09/27 06:00:00 PM

Change Information : Rev 0

Dropdown *Menu* is also available from the *Properties* page and lists all the information you can open, depending on category type and security settings.



For the Workflow, Supporting Items (Relationship, Reverse Relationship), Tree and Where Used links the green icon will appear, if there is any information.

For example: if record has any workflow or any record is added in the relationship grid.



Activity



Dashboard



Discussion



Files



Security



Related



Tree



Vers Hist



Vers Up



Where



Workflow

Change Category



Show as Linked ▾



Type	Lock	Menu	Primary Identifier	Version	Title	Lifecycle State	Category	Workflow	Release Date	Modified Date	Selection Status	Locked By	
<input type="checkbox"/>				AGD-0010162	0.1.1.0	Bi-Weekly Mod Meeting Agenda - 13 Octob	In Work	Agenda	3 of 3	2022/09/29		Jane Smi	
<input type="checkbox"/>				AGD-0010163	0.1.1.0	Bi-Weekly Mod Meeting Agenda - Septemb	In Work	Agenda	2 of 3	2022/09/26		Jane Smi	
<input checked="" type="checkbox"/>				0001409	1.0.0.0	Enterprise Change Request Form (ECR)	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21	✓	Jane Smi
<input type="checkbox"/>				0001409	0.2.0.0	Enterprise Change Request Form (ECR)	Obsolete	Enterprise Change Request	2 of 3	2022/09/21			
<input type="checkbox"/>				AGD-0010161	0.1.0.0			1.3		2022/09/21			Iryna Mor
<input type="checkbox"/>				AGD-0010160	0.1.0.0			1.3		2022/09/21			

Favorites Show files in subfolders

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

<input type="checkbox"/>	Type	Lock	Menu	Record Id...	Primary Identifier	Version	Title	Lifecycle State	Status	Locked By		
<input type="checkbox"/>				2915591	DOC_AGD-0010162	0.1.1.0	Bi-Weekly Mod Meeting Agenda - 13 Octob	In Work		Jane Smi		
<input type="checkbox"/>				2915593	DOC_AGD-0010163	0.1.1.0	Bi-Weekly Mod Meeting Agenda - Septemb	In Work		Jane Smi		
<input type="checkbox"/>				2915496	ECR-0001409	1.0.0.0	Enterprise Change Request Form (ECR)	Released		Jane Smi		
<input type="checkbox"/>				2915497	ECR-0001409	0.2.0.0	Enterprise Change Request Form (ECR)	Obsolete				
<input type="checkbox"/>				2915494	DOC_AGD-0010161	0.1.0.0	Report_Functional - COPY	In Work		Iryna Mor		
<input type="checkbox"/>				2915492	DOC_AGD-0010160	0.1.0.0	Report_Functional	In Work	Agenda	2 of 3	2022/09/21	

Add To Favorites
 If you wish to Add the record to the Favorites, click the *Search and Add to Favorites* icon.

Note:
Add to Favorites icon will be available from the *Properties* page and any pop-up window.



Drag a column and drop it here

Type	Lock	Menu	Primary Identifier	Version	Title
<input type="checkbox"/>			D-0010162	0.1.1.0	E
<input type="checkbox"/>			_AGD-0010163	0.1.1.0	E
<input checked="" type="checkbox"/>			-0001409	1.0.0.0	E
<input type="checkbox"/>			-0001409	0.2.0.0	E
<input type="checkbox"/>			_AGD-0010161	0.1.0.0	R
<input type="checkbox"/>			_AGD-0010160	0.1.0.0	R

Delink

Remove From Favorites
 If you wish to remove any object from your Favorites:

1. Checkmark the box for the File to be removed from Favorites.
2. Click *Delink*.

The *More* button will appear on the top of the screen to provide the ability to manage selected object.

The system allows multiple objects to be selected. All actions listed in the *More* dropdown menu can be performed on the selected objects.

Selected object will be removed from the *Favorites* page. Confirmation Message will display.

Row	Release Date	Modified Date	Selection Status	Locked By
		2022/09/29		Jane Smi
		2022/09/26		Jane Smi
	2022/09/27	2022/09/21	✓	Jane Smi
		2022/09/21		
		2022/09/21		Iryna Mor
		2022/09/21		

Type	Lock	Menu	Identifier	Title	Version	Lifecycle State	Category	Workflow	Release Date	Modified Date	Selection Status	Locked By
<input checked="" type="checkbox"/>				Bi-Weekly Mod Meeting Agenda - 13 Octo	0.1.1.0	In Work	Agenda	3 of 3		2022/09/29		Jane Smi
<input type="checkbox"/>				Bi-Weekly Mod Meeting Agenda - Septemb	0.1.1.0	In Work	Agenda	2 of 3		2022/09/26		Jane Smi
<input type="checkbox"/>				Enterprise Change Request Form (ECR)	1.0.0.0	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21	✓	Jane Smi
<input type="checkbox"/>				Enterprise Change Request Form (ECR)	0.2.0.0	Obsolete	Enterprise Change Request	2 of 3		2022/09/21		
<input type="checkbox"/>								1 of 3		2022/09/21		Iryna Mor
<input type="checkbox"/>								2 of 3		2022/09/21		
<input type="checkbox"/>				DISC-PFC-023-	2914760					2022/08/13		Priyank S
<input type="checkbox"/>				PVT-0001231	2914769					2022/08/13		Priyank S

- Move To
- Copy
- Delete
- Share
- Bulk Edit
- Delink
- Merge
- Assign Lock
- Bulk Workflow
- Version Up
- Security
- Create Tree
- Add to Tree

Sharing Data
 You can share the documents with other users:

1. Checkmark the box for the record to be shared.
2. The *More* button will appear on the top of the screen. Select *Share*.

File has been successfully shared. X

Confirmation message will display on the top of the screen. Notification email will be sent to the assigned user.

1 Item selected.

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

Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version	Lifecycle State	Category	Status	Locked By		
✓	🔒	☰	2915593	DOC_AGD-0010163	Bi-Weekly Mod Meeting Agenda - Septemb	0.1.2.0	In Work	Agenda	2 of 3	2022/09/29	✓	Jane Smi
	🔒	☰	2915591	DOC_AGD-0010162	Bi-Weekly				3 of 3	2022/09/29		Jane Smi
	🔒	☰	2915496	ECR-0001409	Enterprise				3 of 4	2022/09/27		Jane Smi
	🔒	☰	2915497	ECR-0001409	Enterprise				2 of 3	2022/09/21		
	🔒	☰	2915494	DOC_AGD-0010161	Report_Fur				1 of 3	2022/09/21		Iryna Mor
	🔒	☰	2915492	DOC_AGD-0010160	Report_F				2 of 3	2022/09/21		
	🔒	☰	2914780	DISC-PFC-023-	C002W314							Priyank S
	🔒	☰	2914769	PVT-0001231	Qsavegq11							Priyank S

Quick Share Settings

Share What :
DOC_AGD-0010163, Version 2, Bi-Weekly Mod Meeting Agenda - September 15

Share With :
edna.sacro@awarebase.com

Message :
I just shared the following file with you using Tina (our Document Control system):

→ Share Cancel

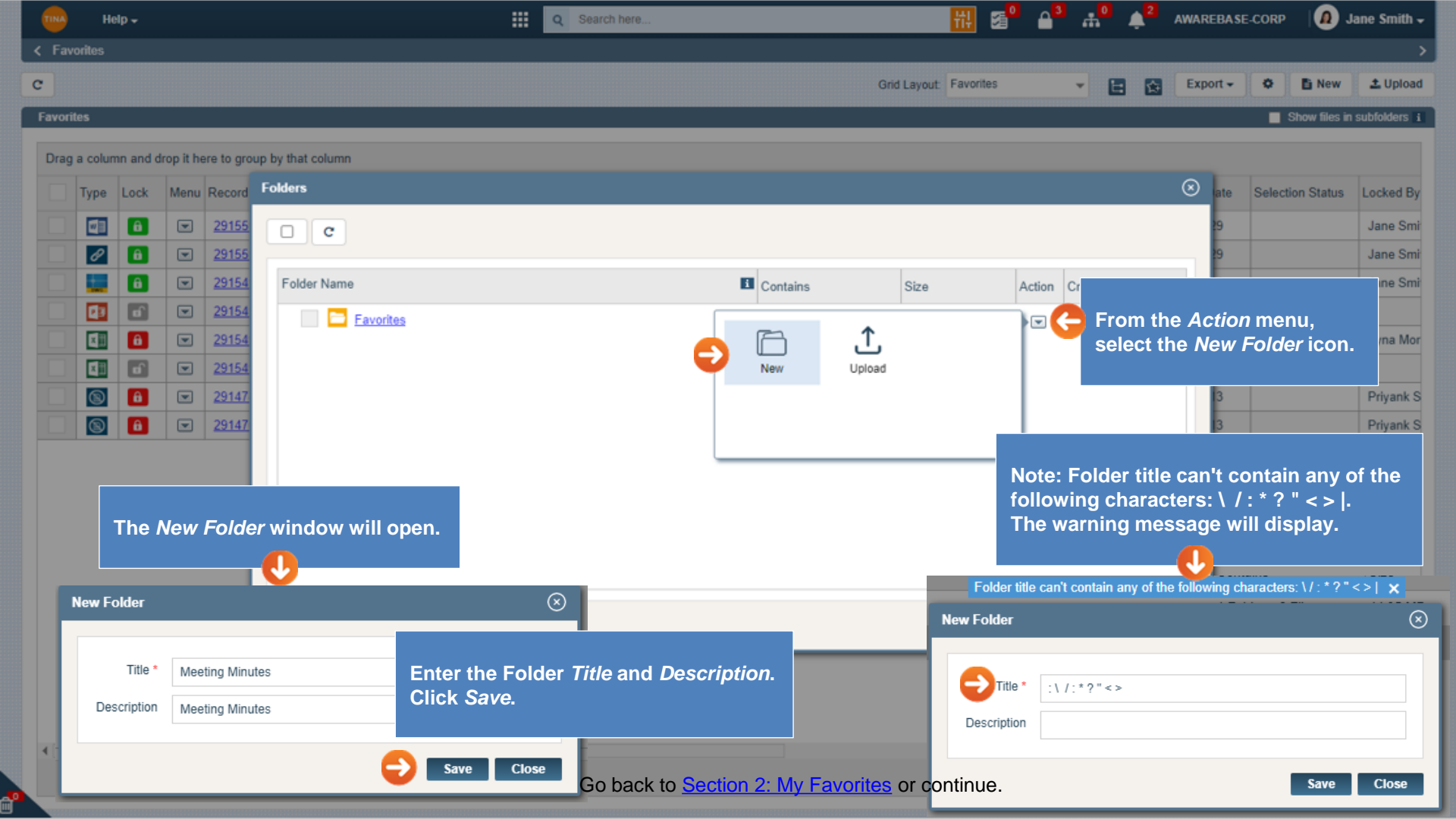
Enter Share With information (email) and click Share.

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

<input type="checkbox"/>	Type	Lock	Menu	Record Id...	Primary Identifier	Title	Version						Selection Status	Locked By
<input type="checkbox"/>				2915593	DOC_AGD-0010163	Bi-Weekly Mod Meeting Agenda - Septemb	0.1.2.0							Jane Smi
<input type="checkbox"/>				2915591	DOC_AGD-0010162	Bi-Weekly Mod Meeting Agenda - 13 Octob	0.1.1.0							Jane Smi
<input type="checkbox"/>				2915496	ECR-0001409	Enterprise Change Request Form (ECR)	1.0.0.0	Released	Enterprise Change Request	3 of 4	2022/09/27	2022/09/21		Jane Smi
<input type="checkbox"/>				2915497	ECR-0001409	Enterprise Change Request Form (ECR)	0.2.0.0	Obsolete	Enterprise Change Request	2 of 3		2022/09/21		
<input type="checkbox"/>				2915494	DOC_AGD-0010161	Report_Functional - COPY	0.1.0.0	In Work	Agenda	1 of 3		2022/09/21		Iryna Mor
<input type="checkbox"/>				2915492	DOC_AGD-0010160	Report_Functional	0.1.0.0	In Work	Agenda	2 of 3		2022/09/21		
<input type="checkbox"/>				2914780	DISC-PFC-023-	C002W3144	0.1.0.0	In Work	Drawing			2022/08/13		Priyank S
<input type="checkbox"/>				2914769	PVT-0001231	Qsavegq11	0.1.1.0	In Work	Private			2022/08/13		Priyank S

You can organise document records in the Favorites. If you wish to create a New Folder, click the Folder navigation and management icon.





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

Type	Lock	Menu	Record	Date	Selection Status	Locked By
			29155	19		Jane Smi
			29155	19		Jane Smi
			29154			Jane Smi
			29154			Jane Smi
			29154			Jane Smi
			29154			Jane Smi
			29154			Jane Smi
			29147			Priyank S
			29147			Priyank S

Folders

Folder Name

Contains Size Action Cr

New Upload

From the Action menu, select the New Folder icon.

Note: Folder title can't contain any of the following characters: \ / : * ? " < > |. The warning message will display.

The New Folder window will open.

New Folder

Title * Meeting Minutes

Description Meeting Minutes

Save Close

Enter the Folder Title and Description. Click Save.

New Folder

Folder title can't contain any of the following characters: \ / : * ? " < > |

Title * : \ / : * ? " < > |

Description

Save Close

New Folder has been created on the Favorites.

Folders

1 Items selected.

Folder Name	Contains	Size	Action	Created
Favorites	1 Folders, 8 Files	44.05 MB		2022/09/15
Meeting_Minutes				2022/09/29

New Create Manage
Rename Show Log Upload

Close

Rename Folder

You can rename your folder on the Favorites:

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

1

Move To

Copy

Delete

Share

Bulk Edit

Delink

Merge

Assign Lock

Bulk Workflow

Version Up

Security

Create Tree

Add to Tree

Add To Folder

You can add any record to the Folder. To do this, checkmark the box for the record to be moved to the *Folder*.

From the *More* dropdown menu select the *Move To* option to add selected record to the Folder.

ID	Title	Workflow	Subfiles	Where Used	Locked By	Tree
0000005	WhereUsedResu	1 of 3	0	0	Jane Smith	0
0000004	Report_Function	1 of 2	0	0	Jane Smith	0
SA-0000003	3D CADD C/S/A	0 of 1	0	0	Jane Smith	0
PROC-0000001	Block Flow Diagram (BFD)	1 of 1	0	0	Iryna Morozova	0
0000002	Aero Report	1 of 3	0	0		0
0000001	Directional Stability Tests at M=1.57 on a	4 of 4	0	1		0

2

Move To/ Link to the Selected Folder window will open.

Move to / Link to the Selected Folder

FAVORITES

- Meeting Minutes

3

Move To Cancel

The List of existing Folders will display. Select the Folder.

Select the Move To button to proceed.

Selected document record has been moved to the Folder.

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

Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle State	Version	Category	Workflow	Subfiles	Where Used	Locked By	Tree
			2924274	AREP-0000004	Report_Functional	Released	1.0.0.0	Aero Report	1 of 2	0	0	Jane Smith	0
			2924259	AREP-0000002	Aero Report	In Work	0.1.0.0	Aero Report	1 of 3	0	0		0



Folder Navigation

Right-click on any folder label in the Breadcrumbs will open a list of Sub-Folders in the drop-down list (single level).

Click on any sub-folder in the drop-down list will navigate to that folder.

Drag ... here to group

Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle State	Version	Category	Workflow	Subfiles	Where Used	Locked By	Tree
			2924275										
			2924273										
			2924268	DWG-PROC-0000001	Block Flow Diagram (BFD)	In Work	0.1.0.0	Block Flow Diagram (BFD)	1 of 1	0	0	Iryna Morozova	0
			2889392	AREP-0000001	Directional Stability Tests at M=1.57 on a	Released	1.0.0.0	Aero Report	4 of 4	0	1		0

Context menu for 'Copy Record':

- Move To
- Copy
- Delete
- Share
- Bulk Edit
- Delink
- Merge
- Assign Lock
- Bulk Workflow
- Version Up
- Security
- Create Tree
- Add to Tree

Copy Record

The system allows multiple objects to be selected. If you wish to copy any object:

1. Checkmark the box for the document record to be copied.
2. From the *More* dropdown menu select the *Copy* option.

Record ID	Title	Lifecycle State	Version	Workflow	Subfiles	Where Used	Locked By	Tree
00000003	3D CADD C/S/A Model	Released	1.0.0.0	3D CADD C/S/A Model	0 of 3	0	Jane Smith	0
PROC-0000001	Block Flow Diagram (BFD)	In Work	0.1.0.0	Block Flow Diagram (BFD)	1 of 1	0	Iryna Morozova	0
00000001	Directional Stability Tests at M=1.57 on a	Released	1.0.0.0					

Files and Folders copied successfully. ✕

Some files could not be copied because you do not have permission or they are deleted. ✕

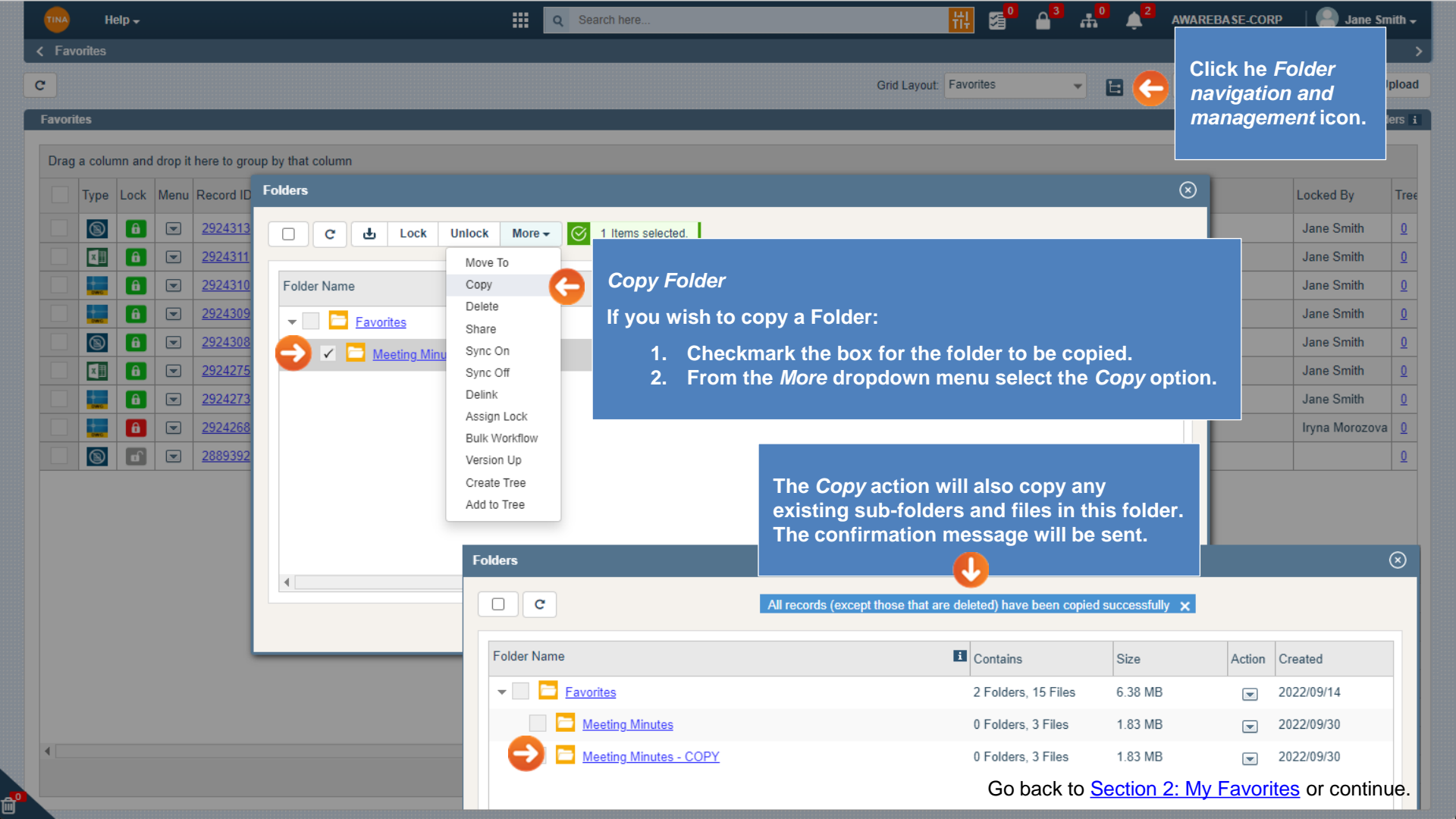
The following rules/messages have been implemented:

1. Copy functionality doesn't require the record to be Locked. If you have security permissions of Copy, success message will appear, and the records will be copied.
2. If you don't have security permissions of Copy, the warning message "You don't have security to perform this action" will display.

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

Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle State	Version
			2924273	3DM-CSA-0000003	3D CADD C/S/A Model	Released	1.0.0.0
			2889392	AREP-0000001	Directional Stability Tests at M=1.57 on a	Released	1.0.0.0
			2924275	AREP-0000005	WhereUsedResultSet	In Work	
			2924308	AREP-0000006	Directional Stability Tests at M=1.57 on a	In Work	
			2924268	DWG-PROC-0000001	Block Flow Diagram (BFD)	In Work	
			2924309	DWG-PROC-0000002	Block Flow Diagram (BFD) - COPY(1)		

Note: You can Copy from the Favorites, Search and Properties pages but, if the document is linked to the Favorites, document title will be always updated with "COPY".



Click the Folder navigation and management icon.

Copy Folder

If you wish to copy a Folder:

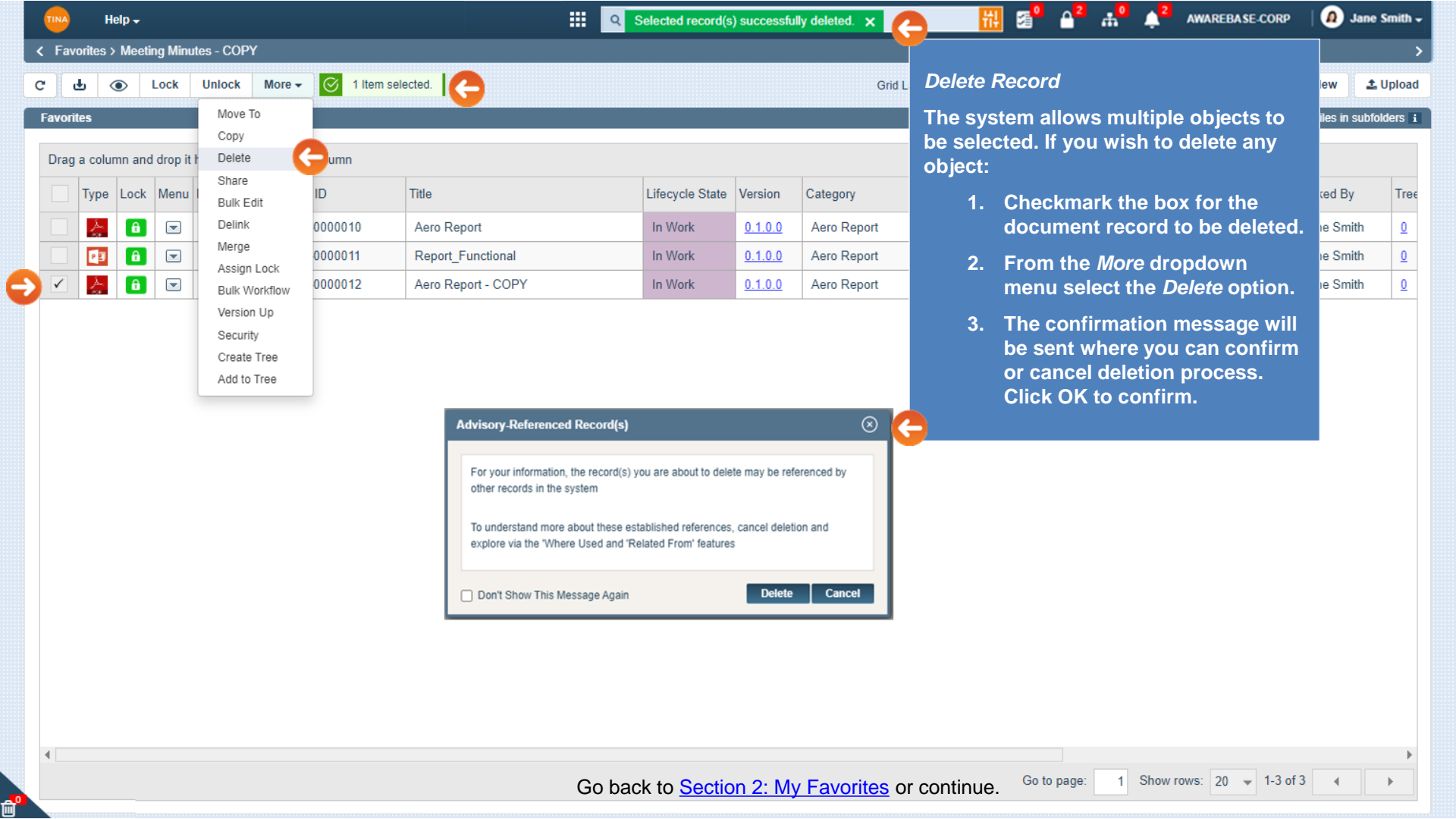
1. Checkmark the box for the folder to be copied.
2. From the *More* dropdown menu select the *Copy* option.

The *Copy* action will also copy any existing sub-folders and files in this folder. The confirmation message will be sent.

All records (except those that are deleted) have been copied successfully

Folder Name	Contains	Size	Action	Created
▼ Favorites	2 Folders, 15 Files	6.38 MB	⌵	2022/09/14
Meeting_Minutes	0 Folders, 3 Files	1.83 MB	⌵	2022/09/30
▶ Meeting_Minutes - COPY	0 Folders, 3 Files	1.83 MB	⌵	2022/09/30

Go back to [Section 2: My Favorites](#) or continue.



- Move To
- Copy
- Delete
- Share
- Bulk Edit
- Delink
- Merge
- Assign Lock
- Bulk Workflow
- Version Up
- Security
- Create Tree
- Add to Tree

ID	Title	Lifecycle State	Version	Category
0000010	Aero Report	In Work	0.1.0.0	Aero Report
0000011	Report_Functional	In Work	0.1.0.0	Aero Report
0000012	Aero Report - COPY	In Work	0.1.0.0	Aero Report

Delete Record

The system allows multiple objects to be selected. If you wish to delete any object:

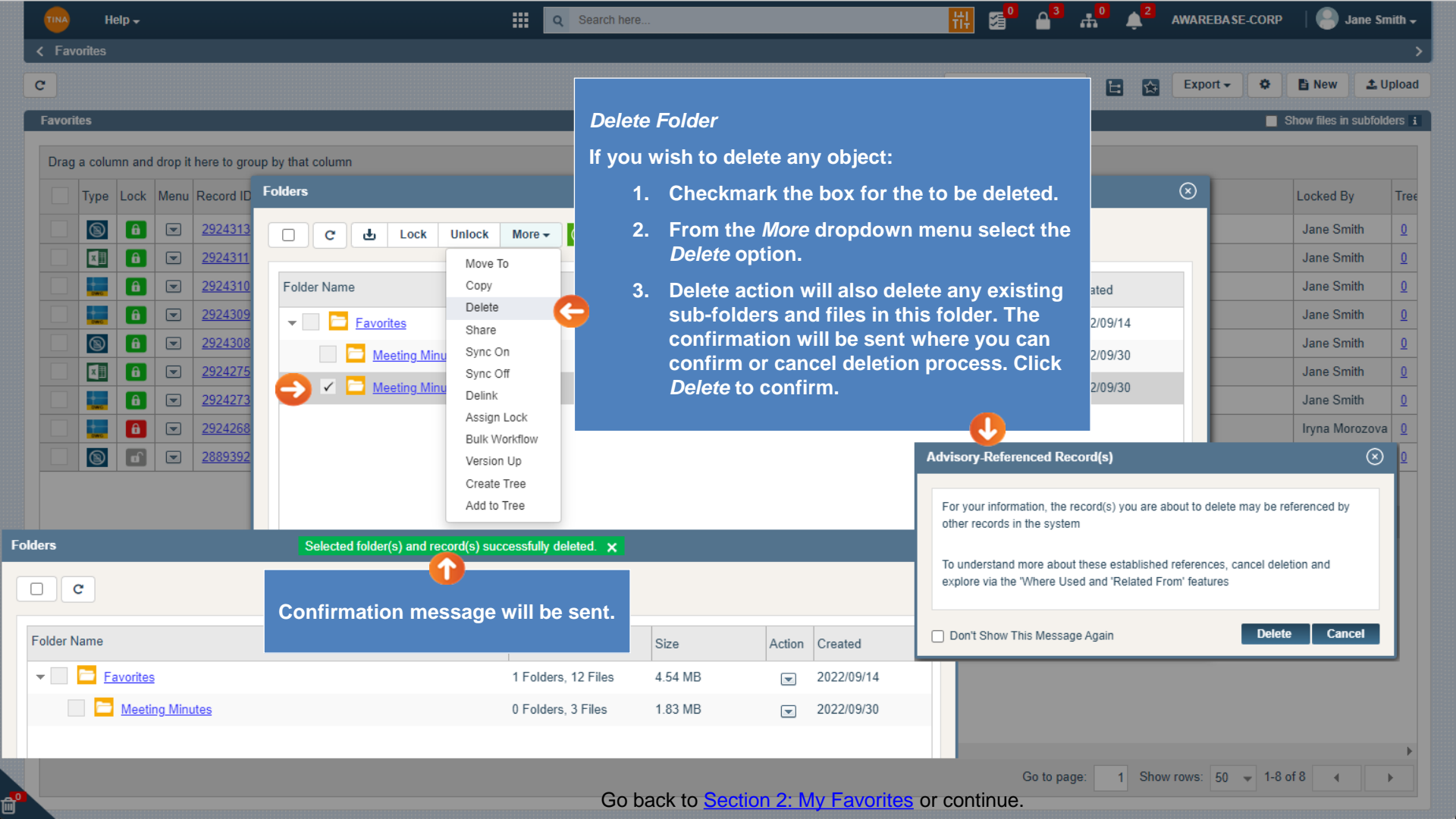
1. Checkmark the box for the document record to be deleted.
2. From the *More* dropdown menu select the *Delete* option.
3. The confirmation message will be sent where you can confirm or cancel deletion process. Click OK to confirm.

Advisory-Referenced Record(s)

For your information, the record(s) you are about to delete may be referenced by other records in the system

To understand more about these established references, cancel deletion and explore via the 'Where Used' and 'Related From' features

Don't Show This Message Again



Delete Folder

If you wish to delete any object:

1. Checkmark the box for the to be deleted.
2. From the *More* dropdown menu select the *Delete* option.
3. Delete action will also delete any existing sub-folders and files in this folder. The confirmation will be sent where you can confirm or cancel deletion process. Click *Delete* to confirm.

Folders

Folder Name

- [-] Favorites
- [-] Meeting_Minu
- [x] Meeting_Minu

Confirmation message will be sent.

Advisory-Referenced Record(s)

For your information, the record(s) you are about to delete may be referenced by other records in the system

To understand more about these established references, cancel deletion and explore via the "Where Used" and "Related From" features

Don't Show This Message Again

Delete Cancel

Type	Lock	Menu	Record ID
			2924313
			2924311
			2924310
			2924309
			2924308
			2924275
			2924273
			2924268
			2889392

Selected folder(s) and record(s) successfully deleted. ✕

Folder Name	Size	Action	Created
Favorites	1 Folders, 12 Files		2022/09/14
Meeting_Minutes	0 Folders, 3 Files		2022/09/30

Item selected.

Lock Unlock More

Move To
Copy
Delete
Share
Bulk Edit
Delink
Merge
Assign Lock
Bulk Workflow
Version Up
Security
Create Tree
Add to Tree

Type	Lock	Menu	ID	Title
			0000009	Directional Stability Tests at M=1.57 on a
			0000007	WhereUsedResultSet - COPY(2)
			PROC-0000003	Block Flow Diagram (BFD) - COPY(1) - C
			0000006	Directional Stability Tests at M=1.57 on a
			0000005	WhereUsedResultSet
			SA-0000003	3D CADD C/S/A Model
<input checked="" type="checkbox"/>			2924268	DWG-PROC-0000001
			2889392	AREP-0000001

Assign Lock To Someone Else

Users who have the permission can assign the lock of documents to any other user:

1. Checkmark the box for the record.
2. From the *More* dropdown menu select the *Assign Lock* option.
3. The *Assign Lock* window will open. Type and Search any user to assign lock.
4. As soon as user is selected, pop-up will be closed and lock will be assigned to this user.
5. Notification will be sent to the user from whom the lock is taken away and to the user who gets the lock.

Both the assigner and the assignee must have security permissions:

- Assigner – Override Lock (take lock from another),
- Assignee – Take Lock.

Assign Lock

jane

Jane Smith

2 Items selected.

More

Move To
Copy
Delete
Share
Bulk Edit
Delink
Merge
Assign Lock
Bulk Workflow
Version Up
Security
Create Tree
Add to Tree

ID	Title	Lifecycle
0000009	Directional Stability Tests at M=1.57 on a	In Work
0000007	WhereUsedResultSet - COPY(2)	In Work
PROC-0000003	Block Flow Diagram (BFD) - COPY(1) - C	In Work
0006	Directional Stability Tests at M=1.57 on a	In Work
0000005	WhereUsedResultSet	In Work
SA-0000003	3D CADD C/S/A Model	Released
2924268	DWG-PROC-0000001	In Work
2889392	AREP-0000001	Released

Bulk Version Up

You will be able to bulk version up on multiple files.

Note that default Version Up configuration setting is obeyed (File Attachment, Version Type, Change Info, Inherit Ancillary and Security):

1. Checkmark the boxes for the documents to be versioned up.
2. From the More dropdown menu select the Version Up option.
3. A job will be created, and flying message will be displayed giving information about Job number.
4. You can check the status of version up job in the Job Status Report.
5. Job Status emails (Started/Completed) will be sent.
6. Newly created records will appear under you Favorites folder.

Bulk Version Up can be done from both the Favorites and Search grid.

Job Status

Export

Job Id	Action	Rids	Job Status	Job Submitted	Job Completed	Notes
66669	Version Up	2	(2/2)-Completed	2022/10/03	2022/10/03	Type Your Notes Here
66668	Workflow Response	2	(2/2)-Completed	2022/09/20	2022/09/20	Type Your Notes Here



Favorites

Refresh Download Eye Lock Unlock More

Grid Layout: Favorites



Export



New

Upload

Favorites

Show files in subfolders

Drag a column and drop it

column

	Type	Lock	Menu	ID	Title	Lifecycle State	Version	Category	Workflow	Subfiles	Where Used	Locked By	Tree
<input type="checkbox"/>				PROC-0000005		In Work	0.1.0.0	Block Flow Diagram (BFD)		0	0	Jane Smith	3
<input type="checkbox"/>				0000001	Directional Stability Tests at M=1.57 on a	In Work	1.1.0.0	Aero Report	0 of 4	0	1	Jane Smith	0
<input type="checkbox"/>				SA-0000003	3D CADD C/S/A Model	In Work	1.1.0.0	3D CADD C/S/A Model	0 of 1	0	1	Jane Smith	0
<input type="checkbox"/>				0000009				Report		0	0	Jane Smith	0
<input type="checkbox"/>				0000007				Report		0	0		0
<input type="checkbox"/>				0000000				Block Flow Diagram (BFD)		0	0	Iryna Morozova	0
<input type="checkbox"/>				2924308	AREP-0000006			Report		0	0		0
<input type="checkbox"/>				2924275	AREP-0000005	WhereUsedResultSet	In Work	0.1.0.0	Aero Report	1 of 3	0		0
<input type="checkbox"/>				2924273	3DM-CSA-0000003	3D CADD C/S/A Model	Released	1.0.0.0	3D CADD C/S/A Model	0 of 1	0	Jane Smith	0
<input type="checkbox"/>				2924268	DWG-PROC-0000001	Block Flow Diagram (BFD)	In Work	0.1.0.0	Block Flow Diagram (BFD)	1 of 1	0	Iryna Morozova	0
<input type="checkbox"/>				2889392	AREP-0000001	Directional Stability Tests at M=1.57 on a	Released	1.0.0.0	Aero Report	4 of 4	0	Jane Smith	0

The [Create Tree](#) and [Add To Tree](#) options will be available in the Favorites, Search, Tree, and Locked By Me UIs under the More menu.



AWAREBASE-CORP Jane Smith

Search here...

Export New Upload

Show files in subfolders

1 Item selected. **Add To Tree**

Add To Tree

You can select any record and choose the option **Add To Tree**. Search for the existing record, **Lock** it and then **Link** to it. The selected record will be automatically 'Tree'd'.

1

2

Document Tree - Identifier: DWG-PROC-0000002 Version: 0.1.0.0 RID: 2924309 Change Info: Rev 0

Show Latest

Layout: Tree Layout (NSL) Save

	Type	Lock	Menu	Record	Internal ID	Title	Lifecycle State	Version
<input type="checkbox"/>				2924309 (1)	DWG-PROC-0000002	Block Flow Diagram (BFD) - COPY(1)	In Work	0.1.0.0
<input type="checkbox"/>				2924274 (0)	AREP-0000004	Report_Functional	Released	1.0.0.0

Add to Tree

1 Item selected.

DWG

Grid Layout: Universal (NSL) Select Columns

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

	Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle...	Version	Category
<input type="checkbox"/>				2924310	DWG-PROC-0000003	Block Flow Diagram (BFD) - COPY(1) - COPY	In Work	0.1.0.0	Block Flow Diagram (BF
<input checked="" type="checkbox"/>				2924309	DWG-PROC-0000002	Block Flow Diagram (BFD) - COPY(1)	In Work	0.1.0.0	Block Flow Diagram (BF
				2385234	DWG-STR-0000015	Area 8100 Piperack Module 8100-PRM-006 Plans Elevations and Sections	In Work	0.1.2.0	Structural Drawing

Go To Page: 1 Show Rows: 20 1-20 of 94

Go back to [Section 2: My Favorites](#).

2 **Link** **Link & Close**

View All Selected in Carousel es - COPY(1)

Image Carousel Viewer

Unlock More 3 Items selected.

Layout: Favorites Export New Upload

Favorites Show files in subfolders

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

✓	Type	Lock	Menu	Record ID	Internal ID	Title	Lifecycle State	Version	Category	Workflow	Subfiles	Where Used	Locked By	Tree
✓			☰	2924324	AREP-0000013	Aero Report	In Work	0.1.0.0	Aero Report		0	0	Jane Smith	0
✓			☰	2924325	AREP-0000014	Report_Functional	In Work	0.1.0.0	Aero Report		0	0	Jane Smith	0
✓			☰	2924326	AREP-0000015	Aero Report - COPY	In Work	0.1.0.0	Aero Report		0	0	Jane Smith	0



Multi-select and *View in Carousel* will be available on the grids that have a multi-select option.

Select the records and click the *View All Selected in Carousel* icon.
[Image Carousel page](#) will open in a new tab.

AREP-0000013 Lifecycle : In Work Status : Controlled Change Info : Rev 0

Title : Aero Report
PDF RID : 2924324 Version : 0.1.1.0 Size : 554.97 KB

Select all

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

The header will display information as per the image selected.

- The following icons available:
- Download as per My Settings (Master or Set-as-Viewable).
 - Launch the Viewer page.
 - Context menu of the currently selected file.

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

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



Image Viewer Page

AREP-0000013 Lifecycle: In Work Status: Controlled Change Info: Rev 0



Title: Aero Report

RID: 2924324

Version: 0.1.1.0

Size: 554.97 KB

The header will display information as per the image selected.

Modified: 2022/10/03

View

113% View Annotate Shapes Insert Measure Edit Fill and Sign Forms

No Presets

The Markup controls will be shown in the Viewer page.

You will be able to Download or Print updated file.

- Full screen
- Download
- Print
- Dark mode

TINA FLIGHT MATCHING Matching Parameter Configuration

Devices Permissions

MarkUp Controls

1. If you have Markup Controls permission:

The Text and Highlight features will be visible in the right-click menu.

You will be able to add text boxes and sticky notes, underline or highlight text, create

Click on the hyperlink to jump to the section

Fillable PDF Form

View

118% - +

View Annotate Shapes Insert Measure Edit Fill and Sign Forms

Hand tools: eraser, highlighter, text, stamp, lasso, zoom

Signature: Jane Sm

New Agreement

Revised Agreement

(All sections must be completed)

You can Download or Print updated form.

- Full screen
- Download
- Print
- Dark mode

ORGANIZATION	
Legal Name of Organization Design and Development	Parent company is located outside Canada <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Operating Name (if different from Legal Name of Organization)	Business Number 123456 789
Original Number of Employees in Canada 2012 Code	Total number of employees in Canada (Permanent Full-time and/or Part-time) <input type="checkbox"/> Federally Regulated <input checked="" type="checkbox"/> Provincially Regulated

You will be able to update Fillable PDF Form from the Image Viewer page and Sign it.

HEAD OFFICE		
City Edmonton	Province AB	Postal Code
Telephone Number		

SIGNATORY			
NOTE: The signatory must be the Chief Executive Officer OR an authorized person in an executive position with legal authority to sign a contract on behalf of the organization.			
Name (print)		Title	
Telephone Number	E-mail Address	Preferred Language of Correspondence <input checked="" type="checkbox"/> English <input type="checkbox"/> French	
Signature Jane Sm		Date (YYYY-MM-DD) 2022-06-17	

Privacy Notice:

AREP-0000013 Lifecycle: In Work Status: Controlled Change Info: Rev 0

Title: Aero Report
PDF RID: 2924324 Version: 0.1.1.0 Size: 554.97 KB

Modified: 2022/10/03

The Markup Controls will be hidden.

View

50% - +

Full screen Download Print Dark mode

Devices Permissions
Markup Controls
2. If you don't have Markup Controls permission:

You will be able to Download or Print the file.

The Text and Highlight features will not be visible in the right-click menu.

Supported File Types

MICROSOFT OFFICE FORMATS		FILE EXTENSION	IMAGE FORMATS		FILE EXTENSION
Microsoft Word		*.doc	Microsoft Windows Bitmap		*.bmp
Microsoft Word Open XML		*.docx	Windows Metafile		*.wmf
Word Macro-Enabled Document		*.docm	Enhanced Metafile		*.emf
Microsoft Excel		*.xls	Graphics Interchange Format		*.gif
Microsoft Excel Open XML		*.xlsx	JPEG File Interchange		*.jpg, *.jif
Excel Binary Workbook		*.xlsb	JPEG 2000 File Format and Code Stream		*.jp2, *.jpc
Excel Macro-Enabled Workbook		*.xlsm	Portable Network Graphics		*.png
Microsoft PowerPoint		*.ppt	Tagged Image File		*.tif, *.tiff
Microsoft PowerPoint Open XML		*.pptx	Any printable document**		*.*
PowerPoint Macro-Enabled Presentation		*.pptm			
Microsoft Publisher*		*.pub	CAD FORMATS		FILE EXTENSION
Microsoft Visio Drawing		*.vsd, *.vsdx	AutoCAD Drawing		*.dwg
PDF FORMATS		FILE EXTENSION	AutoCAD Drawing Interchange Format		*.dxf
Portable Document Format (1.x to 2.0)		*.pdf	MicroStation Design File		*.dgn
Portable Document Format for Archiving (PDF/A 1, 2, 3)		*.pdf	Autodesk Revit		*.rvt
Fillable PDF Forms		***	Design Web Format		*.dwf
DOCUMENT FORMATS		FILE EXTENSION	TEXT FORMATS		FILE EXTENSION
Rich Text Format*		*.rtf	Text*		*.txt
Open office*		*.odt, *.ods, *.odp	Any printable document**		*.*

*** WebViewer does not support .XFA format, as it has been removed from the PDF 2.0 specification, and only support normal forms content in PDFs. [Fillable PDF Form](https://www.pdftron.com/documentation/web/faq/xfa-lifecycle-support/)
<https://www.pdftron.com/documentation/web/faq/xfa-lifecycle-support/>

Go back to [Section 2: My Favorites](#).