



gPLM

# gPLM G650 Training Document Management



V6

# Training Objectives

At the completion of this training, you will:

- Navigate libraries.
- Create libraries, bookshelves, books, and documents.
- Manage lifecycles and routes.
- Download and upload documents.

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# Library Basics



# Open a Library

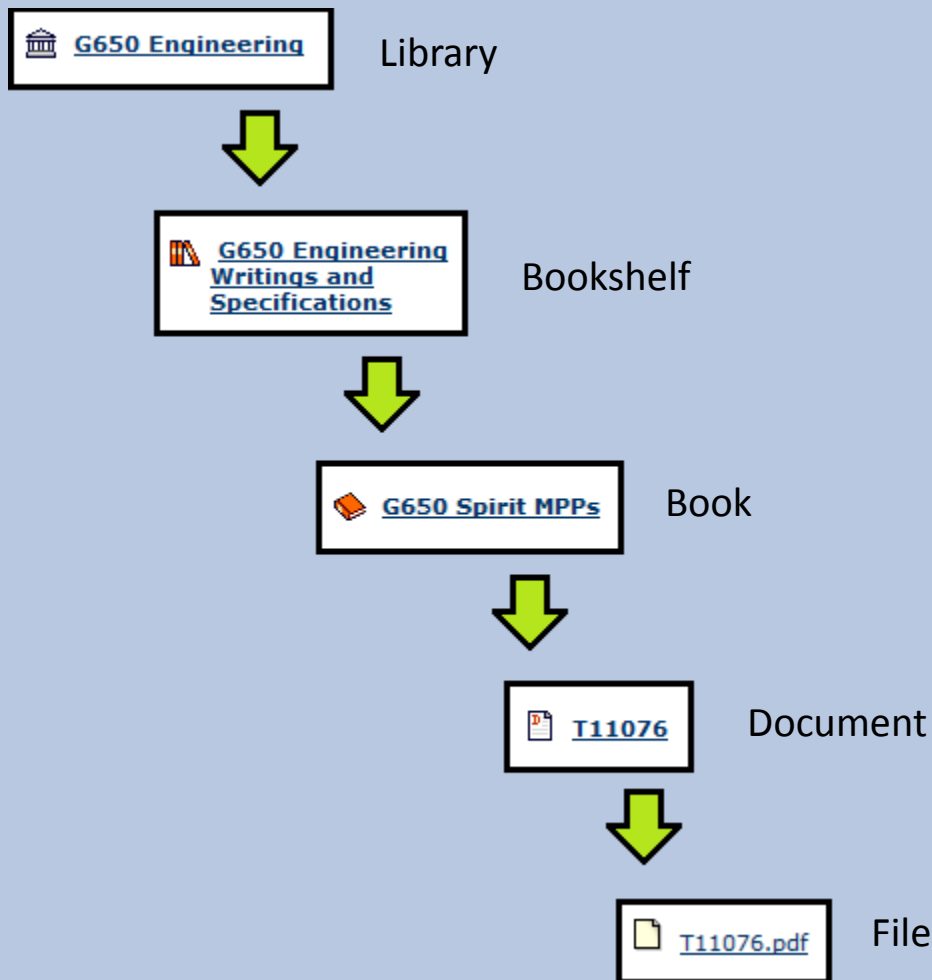
1

The screenshot shows a web application interface with a navigation menu on the left and a main content area on the right. The navigation menu includes options such as Program Mgmt, DRL Mgmt, DID Mgmt, Lists, Issues, Discussions, My Subscriptions, Admin Tools, Collections, Routes, My Tasks, Member Lists, Workflows, Meetings, Decisions, Product Line, Variant Configuration, Library, Record Retention, Program, Unit Tracking, Supplier, Sourcing, and Designer. The 'Library' option is highlighted with a green box. A green callout box points to the 'Libraries' option in the sub-menu, with the text 'Open the Library Click: 1. My Desk 2. Library 3. Libraries'. The main content area features a large graphic with the 'DS ENOVIA' logo and the text 'V6'. The top navigation bar includes 'Actions', 'Back', 'Forward', 'Metrics', 'Tools', and 'Physical Country/Location: United States'. The user name 'User Name: Hill, Mark' is displayed in the top right corner.

2

3

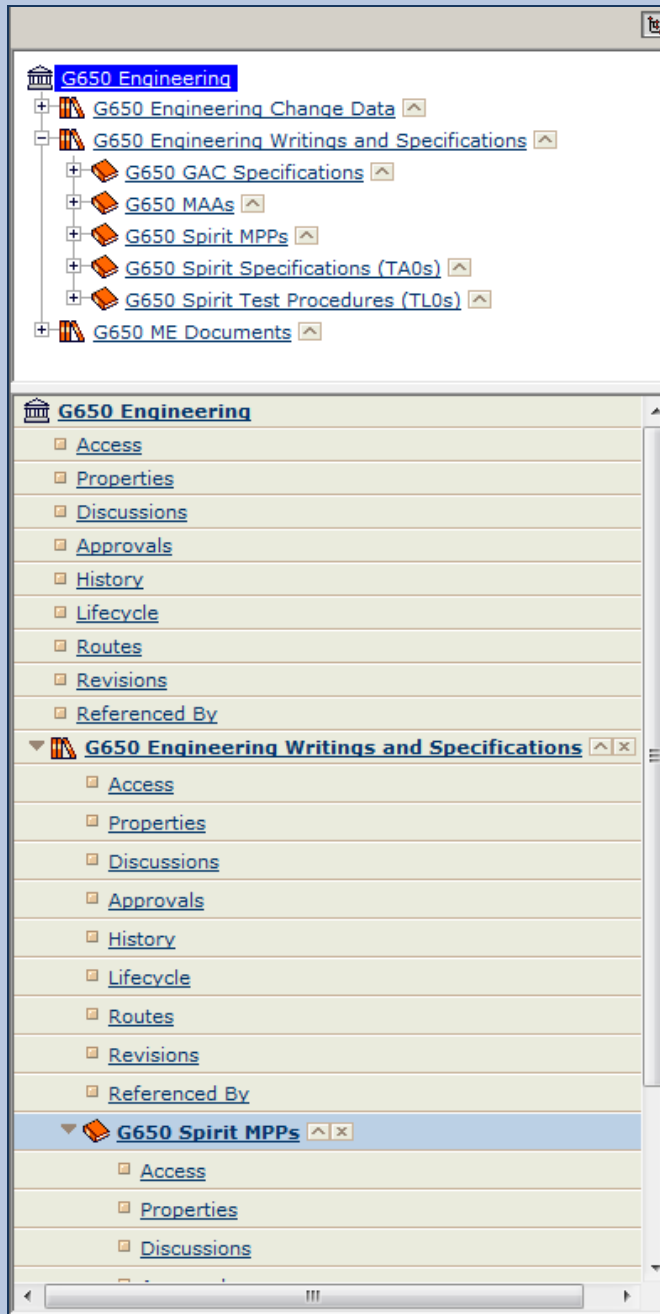
# Library Structure



Libraries aid in the organization and management of documents in the system.

Libraries are organized in a hierarchical manner as shown in the diagram at left.

# Library Structure



The navigation panel to the left of the library screen display the hierarchy and indicate your location in the levels.

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# Library Structure Creation



# Create New Doc Library

1

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes items such as Program Mgmt, DRL Mgmt, DID Mgmt, Lists, Issues, Discussions, My Subscriptions, Admin Tools, Collections, Routes, My Tasks, Member Lists, Workflows, Meetings, Decisions, Product Line, Variant Configuration, Library, Record Retention, Program, Unit Tracking, Supplier, Sourcing, and Designer. The 'Library' item is highlighted with a green box. A callout box with a green background and black text points to the 'Library' item and contains the following text: 'Open the Library Click: 1. My Desk 2. Library 3. Libraries'. The main content area features a large blue graphic with the 'DS ENOVIA' logo and the text 'V6'. The top of the interface includes a navigation bar with 'Actions', 'Back', 'Forward', 'Metrics', 'Tools', and a user profile section for 'Physical Country/Location: United States' and 'User Name: Hill, Mark'. A red '2' is positioned to the left of the 'Library' menu item, and a red '3' is positioned to the left of the 'Libraries' sub-item.

Open the Library  
Click:  
1. My Desk  
2. Library  
3. Libraries

Library Maintenance  
Documents  
Libraries  
Folders  
Display Rules  
Access Requests  
Reports  
Export Control

DS ENOVIA  
All rights reserved.  
Aerosystems, and is intended for the use of authorized users only. All  
ing system with or without authority, or in excess of their authority,  
tem personnel. If any such monitoring reveals evidence of criminal  
U.S. state or federal law, such evidence may be provided to law  
further legal action by this Corporation and/or the organization's  
ted use of this system is prohibited and may result in revocation of  
action. The company reserves the right to monitor and review user



# Create New Doc Library

1

2

Click:  
1. Actions  
2. Library Wizard

Rev	Type	Title	Description	State	Owner
-	-	-	Library for G250 Program Engineering Change Attributes	Active	s2501937
A	Docu Libra	G650 Engineering Data	G650 Engineering Data	Approved	Release Manager
-	Gene Libra	-	Library for G650 Programs Engineering Change Attributes	Active	s2501937
A	Document Library	G650 Functional Testing in FUNCT2 Environment	G650 Functional Testing in FUNCT2 Environment	Approved	Release Manager

**G650 Functional Testing Library**

# Create New Doc Library

Create New Library - Windows Internet Explorer

**Step 1 of 2: Specify Details**

1. Enter attribute values in all fields

<b>Name</b>	G650 Sample Library A1A	1
<b>Revision</b>	A	
<b>Type</b>	Document Library	...
<b>Title</b>	G650 Sample Library in F	
<b>Description</b>	G650 Sample Library in FUNCT2 Environment	
<b>Owner</b>	Hill, Mark	... Clear
<b>Approver</b>	Baker, James	... Clear
<b>Created On</b>	Aug 10, 2012	... Clear

Click the ellipsis button to select Approver (see next slide)

2. Click Next

2

Next Cancel

# Create New Doc Library

Approver

1

Clear

New Window

1. Click the ellipsis button
2. Enter names as appropriate. Click Find
3. Select a person by clicking the radio button
4. Click Select

OVIA - Windows Internet Explorer

### Find People

Basic

Find People

Type	Person
User Name	*
First Name	*
Last Name	*
Organization	Spirit AeroSystems

Limit to 100 Results

Find Cancel

2

ENOVIA - Windows Internet Explorer

### Person Search Results

New Search Refine Search ?

	Name	User Name	
<input type="radio"/>	Adams, Kris	f0205538	
<input type="radio"/>	Adams, Kris	s0205538	
<input checked="" type="radio"/>	Baker, James	s0226443	
<input type="radio"/>	Banta, Russell	a2609812	Spirit AeroSystems
<input type="radio"/>	Battershaw, Theodore	s0045051	Spirit AeroSystems

3

4

Select Cancel

# Create New Doc Library

**Step 2 of 2: Actions**

**Notify**   [Clear](#) **1**

**Message**  
The Document Library G650 Sample Library A1A at Revision A has been created by s2607466. You have been selected as a user to be notified that the object has

**Add To Folders**   [Clear](#)

**2**

1. Enter attribute values as necessary

2. Click Done

# Create New Doc Library

Libraries

Actions Search Within View

Name	Rev	Type	State	Owner
<a href="#">G250 Engineering Change</a>	-	General Library	Active	s2501937
<a href="#">G650 Engineering</a>	A	Document Library	Approved	Release Manager
<a href="#">G650 Engineering Change</a>	-	General Library	Active	s2501937
<a href="#">G650 Functional Testing Library</a>	A	Document Library	Approved	Release Manager
<b>1</b> <a href="#">G650 Sample Library A1A</a>		Document Library	Create	s2607466

**2**

- Properties...
- Lifecycle
- Add to Collection
- Files
- Related Files
- All File Details...
- 2** Add To EXC Class...

1. Right-click the Library name link  
2. Select Add TO EXC Class

# Create New Doc Library

**Search** Case Sensitive  Limit to 100 results |   |

Attributes

Type

Export Control Class | IP Control Class |

1 IP Control Class

2 IP Control Class

Export Control Class

Security Control Class

Name

Policy

Vault

Modified

Revision

State

Originated

Highest  By State

Active

Collections

V6

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1. Type IP Control Class in Type field
2. Select **IP Control Class** from list
3. Click the green check

# Create New Doc Library

**Search** Case Sensitive  Limit to 100 results | **Search** | **Reset** | **Submit** | **Close**

Attributes

Type  
IP Control Class

Owner

Originator

Title

Name

1

2. Click Search

2

Originated

Modified

Collections

V6

Please enter one or more keywords in the Search field, each one separated by a space. Or, you may enter criteria in the fields provided.

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# Create New Doc Library

**Search** Case Sensitive  Limit to 100 results |

Attributes

Type  
IP Control Class

Owner

Originator

Title

Name

Policy

Vault

Modified

Revision

State

Originated

2. Click Submit

Results: 1, 1 selected

<input checked="" type="checkbox"/>	Name	Rev	Type	Description	State	Library
<input checked="" type="checkbox"/>	G650 Access	-	IP C...	Provides the abilit...	Active	IP Prot...

1. Select G650 Access by clicking the checkbox



# Create Generic Library Docs

1

The screenshot shows a web application interface with a dark blue header and a light blue sidebar. The header contains navigation links: Actions, Back, Forward, Metrics, Tools, and a status bar with 'Physical Country/Location: United States' and 'User Name: Hill, Mark'. The sidebar lists various menu items, with 'Library' highlighted in green. A green callout box points to the 'Library' item, containing the text: 'Open the Library Click: 1. My Desk 2. Library 3. Libraries'. The 'Library' menu is expanded, showing sub-items: Library Maintenance, Documents, Libraries (highlighted in green), Folders, Display Rules, Access Requests, Reports, and Export Control. A red '3' is placed next to the 'Libraries' sub-item. The main content area features a large blue graphic with the 'DS ENOVIA' logo and the text 'V6'. At the bottom right, there is a copyright notice: '© 2009 DS ENOVIA. All rights reserved.' and a disclaimer: 'This system is intended for the use of authorized users only. All use of this system with or without authority, or in excess of their authority, is prohibited. If any such monitoring reveals evidence of criminal activity, the user and/or the organization's use of this system is prohibited and may result in revocation of access. The company reserves the right to monitor and review user activity.' A red '2' is placed next to the 'Library' menu item, and a red '1' is placed next to the 'Actions' link in the header.

# Create Generic Library Docs

Actions Back Forward Metrics Tools Physical Country/Location: United States User Name: Hill, Mark ENOVIA

**Libraries** All

Actions Search Within

Click the Library name link

	Name		Type	Description	State	Owner		
<input type="checkbox"/>	<a href="#">G250 Engineering Change</a>	-	General Library	G250 Engineering Change	Library for G250 Program Engineering Change Attributes	Active	s2501937	
<input type="checkbox"/>	<a href="#">G650 Engineering</a>	A	Document Library	G650 Engineering	G650 Engineering Data	Approved	Release Manager	
<input type="checkbox"/>	<a href="#">G650 Engineering Change</a>	-	General Library	G650 Engineering Change	Library for G650 Programs Engineering Change Attributes	Active	s2501937	
<input type="checkbox"/>	<a href="#">G650 Functional Testing Library</a>	A	Document Library	G650 Functional Testing in FUNCT2 Environment	G650 Functional Testing in FUNCT2 Environment	Approved	Release Manager	

# Create Generic Library Docs

The screenshot shows a web application interface for document management. At the top, there is a navigation bar with 'Actions', 'Back', 'Forward', 'Metrics', and 'Tools' menus. On the right, it displays 'Physical Country/Location: United States' and 'User Name: Hill, Mark'. The ENOVIA logo is in the top right corner.

On the left side, there is a sidebar with a tree view under 'G650 Engineering'. The tree view includes 'G650 Engineering Change Data', 'G650 Engineering Writings and Specifications', and 'G650 ME Documents'. Below the tree view is a list of actions: 'Access', 'Properties', 'Discussions', 'Approvals', 'History', 'Lifecycle', 'Routes', 'Revisions', and 'Referenced By'.

The main content area is titled 'G650 Engineering: Bookshelf'. It features a table with the following columns: Name, Revisions, Title, Description, State, and Owner. The first row is highlighted with a green box, and a callout box points to the 'Name' column of this row.

Name	Revisions	Title	Description	State	Owner	
<a href="#">G650 Engineering Change Data</a>	A	BookShelf	G650 Engineering Change Data	G650 Engineering Data associated with Change Requests	Approved	Release Manager
<a href="#">G650 Engineering Writings and Specifications</a>	A	BookShelf	G650 Engineering Writings and Specifications	Engineering Writings and Specifications for G650 Program	Approved	Release Manager
<a href="#">G650 ME Documents</a>	A	BookShelf	G650 ME Documents	ME Documents associated with the G650 program	Approved	Release Manager



A callout box with the text 'Click the Bookshelf name link' points to the 'G650 Engineering Change Data' link in the table.

# Create Generic Library Docs

The screenshot shows a software interface with a top navigation bar containing 'Actions', 'Back', 'Forward', 'Metrics', 'Tools', and user information: 'Physical Country/Location: United States' and 'User Name: Hill, Mark'. The ENOVIA logo is in the top right.

On the left, there is a tree view under 'G650 Engineering' with sub-items: 'G650 Engineering Change Docs', 'G650 Engineering Writings', and 'G650 ME Documents'. Below this is a detailed view for 'G650 Engineering Change Docs' with sub-items: 'Access', 'Properties', 'Discussions', 'Approvals', 'History', 'Lifecycle', 'Routes', 'Revisions', 'Referenced By', and 'G650 Engineering Change Docs' (expanded) with sub-items: 'Access', 'Properties', and 'Discussions'.

The main area displays a table titled 'G650 Engineering Change Docs'. A green callout box points to the 'G650 Engineering Change Docs' link in the table, with the text 'Click the Book name link'.

	Name ▲	Rev	Title	Description	State	Owner		
<input type="checkbox"/>	 <a href="#">G650 Engineering Change Docs</a>	A	Book	G650 Engineering Change Docs	Documents associated with G650 Engineering Changes	Approved	Release Manager	

# Create Generic Library Docs

The screenshot shows a web application interface for managing documents. The main heading is "G650 Engineering Change Docs: Documents". The view is set to "Last Reviewed Date". The "Actions" menu is open, showing options like "Create New", "Add Existing...", "Download...", "Checkout...", "Subscribe to Selected...", "Remove", and "Request Download Access...". The "Create New" option is highlighted, and its sub-menu is open, showing "Document..." and "Document with Revision...". A green callout box with a white background and a black border contains the following steps:

1. Click Actions
2. Select Create New
3. Select Document

The document list below the menu shows several entries with columns for checkboxes, progress indicators (0/1), document IDs (e.g., ECR-1000 GD14), and titles (e.g., ECP\_1000\_Pg\_1\_of\_2.doc).

Checkbox	Progress	Document ID	Title
<input type="checkbox"/>	0/1	ECR-1000 GD14	ECP_1000_Pg_1_of_2.doc
<input type="checkbox"/>	0/1		000 Part numbers.xls
<input type="checkbox"/>	0/1		JPP-ME_ECR_1000.xls
<input type="checkbox"/>	0/1	ECR-1000 GD17	S141446.xls
<input type="checkbox"/>	0/1	ECR-1000 GD18	S141461.xls
<input type="checkbox"/>	0/1	ECR-1000 GD19	SLCPN_60P5740741M003-01B.xls
<input type="checkbox"/>	0/1	ECR-1000 GD20	SLCPN_60P5740743M003-01B.xls
<input type="checkbox"/>	0/1	ECR-1000 GD21	SLCPN_60P5740745M003-01B.xls

# Create Generic Library Docs

## Step 1 of 2: Specify Details



<b>Name</b>	ECR-1001 Sample Doc <input type="checkbox"/> AutoName
<b>Type</b>	G650 Generic Document <input type="button" value=".."/>
<b>Policy</b>	Controlled Design Release Rev2 <span style="color: red; font-weight: bold;">1</span>
<b>Title</b>	ECR-1001 Sample Doc
<b>Description</b>	G650 Sample Doc in FUNCT2 Environment
<b>ECCN</b>	
<b>Cage Code</b>	79734
<b>Release Type</b>	Design R
<b>Design Group Owner</b>	
<b>Created On</b>	Aug 17, 2

1. Enter attribute values
  - Deselect AutoName
  - Click ellipsis button  to select G650 Generic Document
  - Enter additional attributes as necessary

Select Type

begins with   Top Level Only

Types

- Generic Document
- 787 Tulsa Generic Document
- A350 Generic Document
- CH-53K Generic Document
- Change Management Document
- G250 Generic Document
- G650 Generic Document

2

2. Click Next

# Create Generic Library Docs

**Step 2 of 2: Upload Files**

**File | Format**

C:\Users\s9021224\Desktop\SAM Browse... **1**

generic ▾

**Comments**

Sample G650 upload doc FUNCT2 Environment **2**

1. Click browse to locate & upload (check-in) file(s)  
2. Type check-in comments  
3. Click Done

3


Previous Done Cancel

- Uploaded documents can have long, descriptive names and names with spaces.
- Make sure file names do not include any of the following special characters:  
@ , \* ? [ ] # \$ { } \ " < >
- The filename should follow customer requirements per program (i.e. G250, G650, etc.)

# Create Generic Library Docs

**Specify Classifications**

Add  Remove Selected 

<input type="checkbox"/>	Name ▲	Rev	Type	Title	Description	State	Owner
<input type="checkbox"/>	 Sample Book A1A	A	Book	Sample Book A1A	G650 Sample Book in FUNCT2 Environment	Create	s2607466

Click Done

Done  Cancel



# Create Generic Library Docs

The screenshot shows a web-based interface for managing documents. At the top, there is a navigation bar with 'Actions', 'Back', 'Forward', and 'Metrics' menus. The user is identified as 'Hill, Mark' and the location is 'United States'. The main content area is titled 'Sample Book A1A: Documents' and shows a table of documents. A callout box points to the first document entry, stating 'The Documents screen displays the new book'.

**Sample Book A1A: Documents**  
View: Last Reviewed Date

	Last Reviewed Date		Name	Title	Rev	Ver	Type	Actions	Descripti
<input type="checkbox"/>		0/1	<a href="#">ECR-1001 Sample Document A1A</a>	ECR-1001 Sample Document A1A	-	1	G650 Generic Document		G650 Sam Document Funct2 Environme

**Sample Book A1A**

- Access
- Properties
- Discussions
- Approvals
- History
- Lifecycle
- Routes
- Revisions
- Referenced By