AirGTI® DocManager

User Guide

JOUVE
AirGTI DocManager

Controlled Change Management &
Authoring for Aviation Publications

Chapter 1

Introduction to DocManager

AirGTI® DocManager is web-based application software designed to facilitate controlled change and release management of aviation publications produced and/or revised by commercial aircraft operators and MRO's.

AirGTI® DocManager is an integrated computer application system designed to manage the authoring, change, and release processes associated with aviation publications produced and/or revised by commercial airline operators, MROs, and aerospace OEMs. This solution addresses the special needs of engineering, maintenance, and flight operation organizations; although DocManager could effectively manage any controlled publication.

- Configuring DocManager

- Creating CATs & CRs

- Comparing Company Edition with a new OEM revision

- Using the Inbox

- Releasing a new Revision

- Running reports

- Managing Jobs

Additional Information

For additional information about DocManager, refer to the following documentation:

- DocManager Administration Guide

- DocManager Installation Guide

- Release notes

Online Help

Each DocManager screen has a context sensitive help that is located on the top and at the right hand side of the browser.

Logging onto DocManager

1. Start Windows Internet Explorer.

2. In Address enter:

   http://WebServerName:tomcat_port/DocManager/jsp/login.jsp

3. The DocManager Login screen appears.

Figure 1. **DocManager Login Screen**
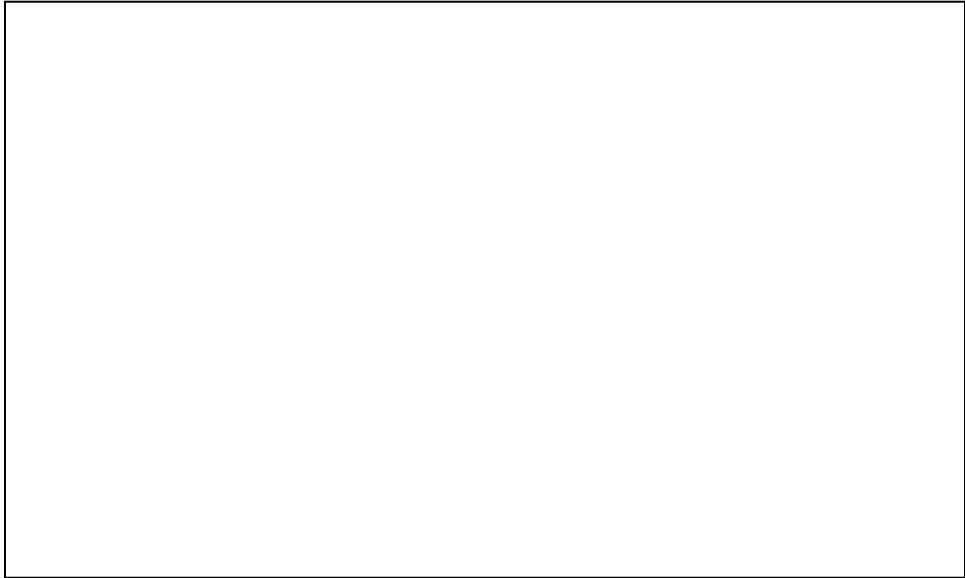
4. In Username, enter your DocManager username.

5. In Password, enter your DocManager Password.

6. In DocBase, select the working DocBase

7. Click **Login**.

Show/Hide DocManager Logo

By default the DocManager Logo always shows at the top of each screen within DocManager. However, DocManager still gives the user the flexibility to show/hide the Logo accordingly.

There may be the case where the user wishes to have more screen space for viewing purpose; he/she then can hide the DocManager Logo by clicking on the **arrow-up** button , which locates at the left hand side and on the very top of the DocManager screen. After this button is click, it will be changed to the arrow-down button and the color will also be changed to black.

Note that when the Logo is hidden, the **LOGGOUT** function of DocManager will also be hidden. To show the Logo as well as the LOGGOUT function back, simply click on the **arrow-down** button .

Chapter 2

Configuring DocManager

Before you begin using DocManager, you must perform the following tasks:

- **Set up users**
  For each individual who will access DocManager, you must set up a user name. User names define the individuals (domain users) who can access the DocManager system, the tasks the user can perform, and the types of information the user can access.

- **Assign the users to groups**
  Groups are used to "bundle" users who can perform similar tasks and to define the information users can access within DocManager. Creating groups provides you with the flexibility of assigning tasks and routing information to an individual user or to a group of users. (During DocManager installation, default groups are defined by the DocManager System Administrator with the assistance of Jouve Aviation Solutions.)

  In order to log into DocManager, a user must be assigned to at least one group.

- **Create publication configurations**
  For each publication that will be imported to DocManager, you must create a publication configuration. A publication configuration defines the type and format of the publication, the aircrafts to which the publication applies, how changes to the publication will be routed, the lifecycle of the publication, and more.

  Publication configurations also create the folder structure (folders and subfolders) within the DocManager data repository where imported publications are stored.

- **Create CAT Types**
  CAT Types define the types of changes that can be made to publications, how changes will be routed, and the lifecycle of the changes.

- **Create OEM Comparison Templates**
  OEM Comparison Templates are defined by the DocManager System Administrator with the assistance of Jouve Aviation Solutions. For additional information see the *DocManager Administration Guide*.

Setting up Users

User names define the individuals that can access the DocManager system, the tasks the individual can perform, and the types of information the individual can access.

Note: *Only an administrator or super user can add, change, or delete users, and change the group assigned to a user.*

Accessing the Group/User Management Screen

1. Click the **Config** tab.

2. On the menu bar, click **User/Group.** The Group/User Management screen appears.

Figure X. **Group/User Management Screen**

The Group, User Name and User OS Name list boxes at the top of the screen are used to select from a list of groups and users which have been defined in DocManager.

The User fields and buttons on the right side of the screen are used to create, edit, or delete a user.

The Group fields and buttons on the left side of the screen are used to create, edit, or delete a group, and to assign or remove a user from a group.

Creating a New User

To create a new user:

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. If the data entry fields contain information, click **Clear**.

3. Enter the following information:

CAT Description	Enter a unique name to identify the CAT within DocManager.
ATA Number(s)	An ATA number identifies a specific portion of a specific publication that can be changed.

To select the ATA fragment(s) to be changed:

a) Click the **Publication Browse** button. A panel opens on the left side of the screen and displays a list of publications within the DocManager repository.

b) Click the publication tree to expand the tree and navigate to the fragments you want to change.

c) Click and highlight the fragments you want to change.

d) Click **Add** (at the bottom of the panel) to add the highlighted fragments to the **ATA number(s)** box.

Supp. Document (s)	An ATA number identifies a specific portion of a specific publication that can be changed.

To select the supporting documents associated with the CAT:

a) Click the **Document Browse** button. A panel opens on the left side of the screen and displays a list of folders within the DocManager repository.

b) Click the folder tree to expand the tree and navigate to the supporting documents you want to associate with the CAT.

c) Click and highlight the documents you want to associate with the CAT.

d) Click **Add** (at the bottom of the panel) to add the highlighted documents to the **Supp.Document(s)** box.

4. Click **New**. The new CAT is added to the DocManager system.

Deleting a User

To delete an existing user:

1. Click the **Config** tab.

2. On the menu bar, click **User/Group**. The Group/User Management screen appears.

3. In the User Name list box, select the user you want to delete.

4. Click **Delete**. The user is deleted from the DocManager system.

Assigning a User to a Group

Groups are used to "bundle" users who can perform similar tasks and to define the information users can access within DocManager. Creating groups provides you with the flexibility of assigning tasks and routing information to an individual user or to a group of users. (During DocManager installation, default groups are defined by the DocManager System Administrator with the assistance of Jouve Aviation Solutions.)

In order to log into DocManager, a user must be assigned to at least one group.

Note: Before you can add a user to a group, you must have previously added the user to DocManager.

To add a user to a group:

1. Click the **Config** tab.

2. On the menu bar, click **Group/User**. The Group/User Management screen appears.

3. In the Group list box, select the group to which the user will be added.

4. In the User Name list box, select the user you want to add to the selected group.

5. Click **Add User**. The selected user is added to the group. The screen refreshes and the user's name appears in the **Users in Group** list.

Deleting a User from a Group

To delete a user from a group:

1. Click the **Config** tab.

2. On the menu bar, click **Group/User**. The Group/User Management screen appears.

3. In the Group list box, select the group from which the user will be deleted.

4. In the User Name list box, select the user you want to delete from the selected group.

5. Click **Remove User**. The selected user is removed from the group. The screen refreshes and the user's name is removed from the **Users in Group** list.

Configuring a Publication

For each publication that will be imported to DocManager, you must create a publication configuration. A publication configuration defines the type and format of the publication, the aircrafts to which the publication applies, how changes to the publication will be routed, the lifecycle of the publication, and more.

When you create a publication configuration, the folder structure (folders and subfolders) is created within the DocManager data repository where imported publications are stored.

Note: *Only an administrator or operator with the appropriate privileges can add, change, or delete publications.*

Accessing the Publication Configuration Screen

To create a new publication configuration click the **Config** tab. The Publication Configuration screen appears.

Figure X. **Publication Configuration Screen**

The fields in the upper portion of the screen are used to create a new publication configuration or edit an existing publication configuration.

The lower portion of the screen lists existing publication configurations.

Creating a Publication Configuration

To create a publication configuration:

1. Click the **Config** tab. The Publication Configuration screen appears.

2. If the data entry fields contain information, click **Clear**.

3. Complete the information:

   Note: *The selections for Model, Manual, Sub-fleet, Workflow template are pre-defined by the System Administrator with the assistance of Jouve Aviation Solutions. See the System Administration Guide for more information.*

Model	From the list box, select the fleet aircraft name to which the publication applies.
Manual	From the list box, select the type of publication.
Sub-fleet	If the publication applies to a specific sub-fleet of the selected model, enter the sub-fleet name to which the publication applies. This field is optional.
Label	DocManager automatically assigns a Label based on the Model, Manual, and Sub-Fleet selections; however, this field can be changed by the user.
Company Revision	This read-only field displays the revision number of the imported publication. DocManager will automatically update the Company Revision number when the first revision of the publication is imported to the publication folder.
	This field is for display purposes only and cannot be changed by the user.
Revision Date	This read-only field displays the date when the first revision of the publication was imported to the publication folder.
	This field is for display purposes only and cannot be changed by the user.
Manage Doc Unit	
Company XML Application	Publications are typically imported into DocManager as XML files. The Company XML Application defines how XML files for the selected publication will be stored, chunked, checked in, checked out, imported, and exported from DocManager.
OEM XML Application	Publications are typically imported into DocManager as XML files. The OEM XML Application defines how XML files for the selected publication will be stored, chunked, checked in, checked out, imported, and exported from DocManager.

Change Management Workflows	Select the default workflow template for the publication.
	Workflow templates define how changes to the publication (publication fragments) will be routed to users within DocManager.
	Note: The default workflow template can be overridden when CRs are created for the publication. See "Creating CATs and CRs" for additional information.
Permission List	Select the ACL (Access Control List) for the publication. The ACL will apply to the whole publication as well as the cabinet and its subfolders within DocManager.
Lifecycle fragment (Document Policy)	Select the lifecycle (document policy) for the publication. The lifecycle is applied when a publication is imported, when a publication fragment is edited, when a publication is approved, and when a publication is released.
	*Note: Currently only the **fragment_lifecycle** selection is supported.*
Document Type	Select the Documentum Object Type for the publication.
	*Note: Currently only the **ata_fragment** selection is supported.*
Publication Data Format	In order for DocManager to process and store the publication properly, you must specify the format of the publication, such as XML, Microsoft Word, PDF, or Framemaker.
	*Note: Currently only **XML** format is supported.*

Configuring CAT Types

CAT Types represent the various types of changes for publications, such as an Engineering Order, that could result in specific additions, changes or deletions to one or more publications.

The Change Authorization & Tracking Configuration screen allows users to create, edit, and delete CAT Types. DocManager provides several pre-defined CAT Types: OEM Revision, Editorial, Eng Order, and Effectivity.

After a CAT Type configuration is saved, it can be used to create a Change Authorization & Tracking Record to route publication changes to users based on the workflow specified for the CAT Type.

Note: Only administrators and operators with the appropriate privileges can access, add, edit, or delete CAT Types.

Accessing Change Authorization & Tracking Configuration Screen

1. Click the **Config** tab.

2. Click **CAT** on the menu bar. The Change Authorization & Tracking Configuration screen appears.

Figure 3. **Change Authorization & Tracking Configuration**

The fields in the upper portion of the screen are used to configure a new CAT Type or edit an existing CAT Type.

The lower portion of the screen lists existing CAT Types.

Creating a CAT Type

To create a new CAT Type:

1. Click the **Config** tab.

2. On the menu bar, click **CAT**. The Change Authorization & Tracking Configuration screen appears.

3. Complete the following information:

CAT Type   Enter a name to describe the CAT Type, such as Mgmt Directive.

Note: DocManager provides several pre-defined CAT Types: OEM Revision, Editorial, Eng Order, and Effectivity.

Workflow Template   Select the default workflow template for routing CRs assigned to the selected CAT Type.

Note: The default workflow template can be overridden when CRs are created for the publication. See "Creating CATs and CRs" for additional information.

CAT Life Cycle	This optional field is reserved for future use.
CR Life Cycle	This optional field is reserved for future use.
Days to Expire	Specifies the number of days the CRs associated with this CAT Type will expire after routing. The default value is 30 days.
Support Document	Check this box to enable the ability to add supporting documents to CATs assigned to this CAT Type. This field is optional.

4. Click **Save as New**. The CAT Type is saved in DocManager. The screen is refreshed and the new CAT Type appears in the Available Change Authorization Trackers list at the bottom of the Change Authorization & Tracking Configuration screen.

Defining Custom CAT Type Data Entry Fields

Custom data entry fields can be defined for each user-defined CAT Type. As many data entry fields as necessary can be defined for a CAT Type. Each field can be defined as a standard (labeled) text box, or as a pull-down selection list. This useful feature makes it easy to configure each CAT Type according to the particular data elements it must contain.

To define a custom CAT Type data entry field:

1. Click the **Config** tab.

2. On the menu bar, click **CAT**. The Change Authorization & Tracking Configuration screen appears.

3. From the Available Change Authorization Trackers, select the CAT Type for which you want to create custom fields.

4. Click **Build**. The Custom Field Definition window appears.

Figure 4. **Custom Field Definition Screen**

5. Complete the following information:

Name   Defines the name of the custom field.

Type   Defines the type of the custom field, either **Text** or **Select**.

If the Select field type is selected, you must define the selections that will appear in the list box for the custom field.

You can define the selection list either by typing each selection and pressing Enter or by separating each value with a comma, such as: Critical, High, Medium, Low.

6. Click **Add**. The data entry field is added to the CAT Type.

7. Repeat steps 1 through 6 to add additional fields to the CAT Type.

8. When all the custom fields are defined, click on the **OK** button to close the Custom Field windows to return to the Change Authorization & Tracking Configuration screen.

9. Click **Save**.

Creating OEM Revision Comparison Templates

OEM Comparison Templates are defined by the DocManager System Administrator with the assistance of Jouve Aviation Solutions. For additional information see the *DocManager Administration Guide*.

Working with Change Authorizations (CATs) and Change Requests (CRs)

In order to make changes to an existing publication, a user must:

1. **Create a Change Authorization Tracking Record (CAT).**

   A CAT defines the reason a particular change is being made to a publication. Such reasons include an OEM revision, editorial modification, an Engineering Order, and effectivity change, or any other reason that would cause a change to a publication.

2. **Identify the units (fragments) of the publication(s) to be changed.**

   A fragment can be any "chunked" portion, or Document Unit (DU) of a publication. Fragments may include the Front Matter, a Chapter, a Section, or any other DU of a publication.

3. **Create a Change Request (CR) for each fragment to be changed.**

   A CR specifies the specific fragment of a publication to be changed, the routing (workflow) to be used, the date the CR was created, and the date the CR is due to be completed, and more.

   For example, an approved Engineering Order (EO) could result in changes to one or more fragments of one or more publications. A CAT would be created to represent the EO, and CRs would be created for each fragment to be changed. Figure 1 illustrates the relationship between a CAT, CRs and publication fragments.

Figure 1. **Relationship of CATs, CRs, and Fragments**
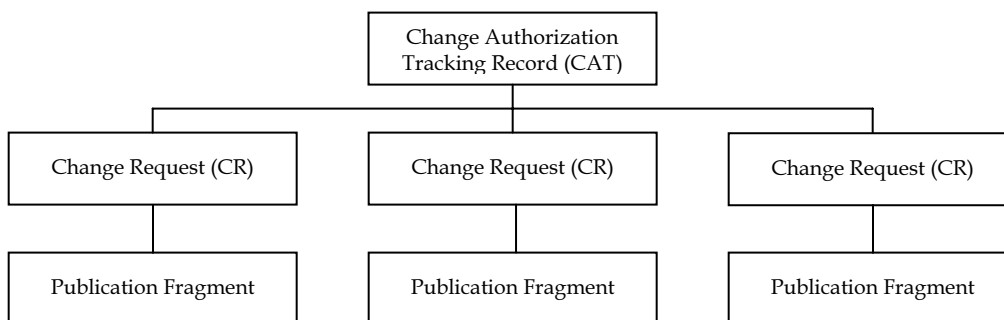
The Change Authorization and Tracking (CAT) screen is used to create, change or delete CATs. This screen is also used to create, change, route and perform other CR operations.

Creating a Change Authorization Tracking (CAT) Record

A Change Authorization Tracking (CAT) Record identifies the reason for a change to one or more fragments of one or more publications.

Three types of CATs can be created:

- **OEM Revision CAT.** An OEM Revision CAT tracks the changes resulting from an OEM Revision. For more information, refer to Creating a New OEM Revision CAT.

- **Standard, Pre-Defined CAT**. Standard CATs include an Editorial Change, Engineering Order, or an Effectivity change.

- **Custom CAT**. Custom CATs are defined with the Change Authorization and Tracking Configuration Screen.

Accessing the Change Authorization & Tracking Records Screen

To access the Change Authorization & Tracking Records screen click the **CAT** tab. The Change Authorization & Tracking Records screen appears.

Figure 2. **Change Authorization and Tracking Records Screen**

The Change Authorization & Tracking Records screen is divided into three sections: the CAT form, Current CATs, and associated Change Requests.

The CAT form is used to enter and edit information about a CAT.

The Current CAT(s) section lists all existing CATs of the selected CAT Type.

The Change Request(s) section lists all CRs associated with the CAT selected (highlighted) in the Current CAT(s) section.

Creating a New CAT

Note: *For information on creating an OEM Revision CAT, refer to Creating a New OEM Revision CAT.*

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. If the data entry fields contain information, click **Clear**.

3. In the **CAT Type** list box, select the CAT Type representing the type of change to be made.

4. Enter the following information:

CAT Description	Enter a unique name to identify the CAT within DocManager.
ATA Number(s)	Enter the ATA number(s) of the publication fragment(s) to be changed. When the CAT is saved, a new CR will be created for each ATA fragment specified.

To select from the publication browser:

   a) Click the **Publication Browse** button. The Publication Browser opens on the left side of the screen and displays a list of publications within the DocManager data repository.

   b) Click the publication tree to expand the tree and navigate to the fragments you want to change.

   c) Click and highlight the fragments you want to change.

   d) Click **Add** at the bottom of the panel. The highlighted fragments are added to the **ATA number(s)** box.

For additional information on ATA fragments, refer to "Importing a Publication."

Supp. Document (s)	If the selected CAT Type allows supporting documents to be associated with the CAT, select the appropriate supporting documents:

   a) Click the **Document Browse** button. A panel opens on the left side of the screen and displays a list of folders within the DocManager data repository.

   b) Click the folder tree to expand the tree and navigate to the supporting documents you want to associate with the CAT.

   c) Click and highlight the documents you want to associate with the CAT.

   d) Click **Add** at the bottom of the panel. The highlighted documents are added to the **Supp.Document(s)** box.

5. Click **New** to create the new CAT record and its associated CRs. The new CAT will be displayed in the **Current CAT(s)** section just below the CAT **Operation** field, and its associated CRs will be displayed in the **Change Request(s)** section at the bottom of the screen.

*Note: If you want to save the CAT but do not want to route any associated CRs yet, click **Draft** instead of clicking **New**.*

Once a CAT has been created, specific Change Requests (CRs) can be associated with it. A CAT can have as many CRs as required; however each CR can correspond to only one ATA fragment.

Creating a New OEM Revision CAT

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select OEM Revision.

3. If the data entry fields contain information, click **Clear**.

4. Enter the following information:

CAT Description	Enter a unique name to identify the CAT within DocManager. For an OEM Revision CAT, this typically includes revision information.
Publication	The Publication box lists all publications within DocManger. Select the publication you want to reconcile.
Revision Number	Enter the revision number associated with the OEM change.
Revision Date	Enter the revision date associated with the OEM change.

5. Click **New** to create the new OEM Revision CAT. The new OEM Revision CAT record will be displayed in the **Current CAT(s)** section just below the CAT **Operation** field. The CRs associated with the CAT will not be created until the OEM Revision Comparison job is run.

*Note: If you want to save the CAT but do not want to route any of its associated CRs yet, click **Draft** instead of clicking **New**.*

Entering Custom Field Information for a CAT

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT for which you want to enter Custom Field information. The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. On the Current CAT(s) list, click the CAT to which you want to enter custom field information. The CAT is highlighted and the information for the CAT appears in the CAT form.

4. Click **Custom Fields**. The CAT Custom Variables dialog box appears.

Figure 3. **CAT Custom Variables Dialog Box**
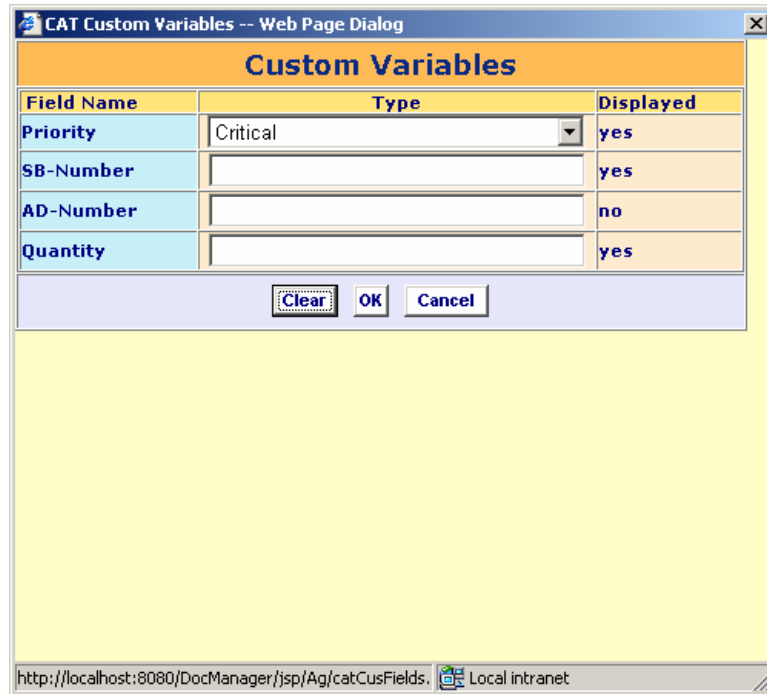
The CAT Custom Variables displays a list of the user-defined fields associated with the CAT Type for the selected CAT.

5. Enter or select the appropriate information and click **OK**. The custom field information is saved.

Assigning an Expiration Date to a CAT

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT to which you want to assign an expiration date.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT to which you want to assign an expiration date. The CAT is highlighted.

4. In the **CAT Operation** list box, select **ASSIGN EXP. DATE** and click **GO**. The **Expiration Date Assignment** dialog box appears.

Figure 4. **Expiration Date Assignment dialog box**
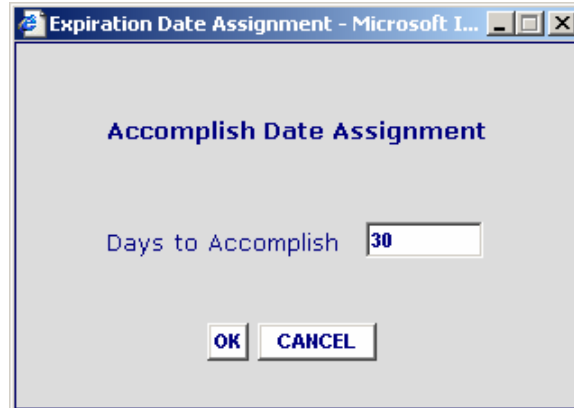
5. In the **Days to Accomplish** box, enter the total number of days allotted to complete each CRs associated with the CAT. The countdown begins on the first day that the associated CR is routed.

6. Click **OK**.

7. The expiration date for each CR associated with the CAT is changed according to the value entered.

Deleting a CAT

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT you want to delete.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to delete. The CAT is highlighted.

4. In the **CAT Operation** list box, select **DELETE** and click **GO**.

5. The message "The selected CAT and its CRs will be deleted" appears.

6. Click **Yes**. The CAT and its associated CRs are deleted from DocManager.

Finishing (Closing) a CAT

A CAT can be closed when all of the CRs associated with the CAT have been completed.

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT you want to finish.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to finish. The CAT is highlighted.

4. In the **CAT Operation** list box, select **FINISH** and click **GO**.

5. DocManager verifies that all CRs associated with the CAT have been closed.

   If all CRs associated with the CAT have been closed, the CAT is closed and its status is updated in the Current CAT(s) list.

   If all CRs associated with the CAT have not been closed or deleted, the message "The last CR is not completed yet" appears. You must close or delete the CRs to be able to finish the CAT.

Working with CRs

When a CAT is saved, a CR is created for each fragment specified by the CAT. The CRs for the selected CAT are listed in the Change Requests(s) in the lower portion of the Change Authorization & Tracking Records screen.

The user who created the CR, or another authorized user can perform various operations on a CR or group of CRs. These operation include:

- Viewing CR Details

- Previewing the Fragment Associated with a CR

- Changing the Default Workflow Assigned to a CR(assigning a workflow)

- Routing a CR

- Viewing or Adding Comments to the CR Log

- Removing (Deleting) a CR

Viewing CR Details

1. Click the CAT tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the CAT Type list box, select the type of CAT to you want to work with.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to work with. The CAT is highlighted and its associated CRs are shown in the Change Request(s) list.

4. In Change Request(s) list, click the CR you want to work with.

5. In the CR Operation list box, select DETAILS.   A panel opens on the left side of the screen and displays information for the CR and the fragment associated with the CR.

Figure 5. **CR Details Panel**

```
┌─────────────────────────────┐
│                             │
│      Details Panel          │
│                             │
│                             │
└─────────────────────────────┘
```

6. To close the Details panel, click the small left arrow button shown at the top of the panel.

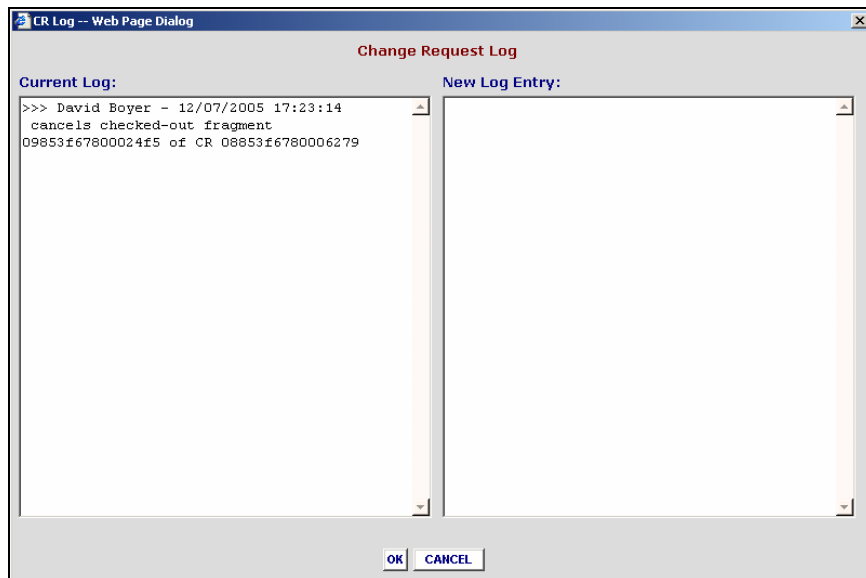# Previewing the Fragment Associated with a CR

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT to you want to work with.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to work with. The CAT is highlighted and its associated CRs are shown in the Change Request(s) list.

4. In Change Request(s) list, click the CR you want to work with.

In the **CR Operation** list box, select **PREVIEW**.   A new window opens and displays the fragment associated with the CR.

Figure 6. **CR Fragment Preview window**
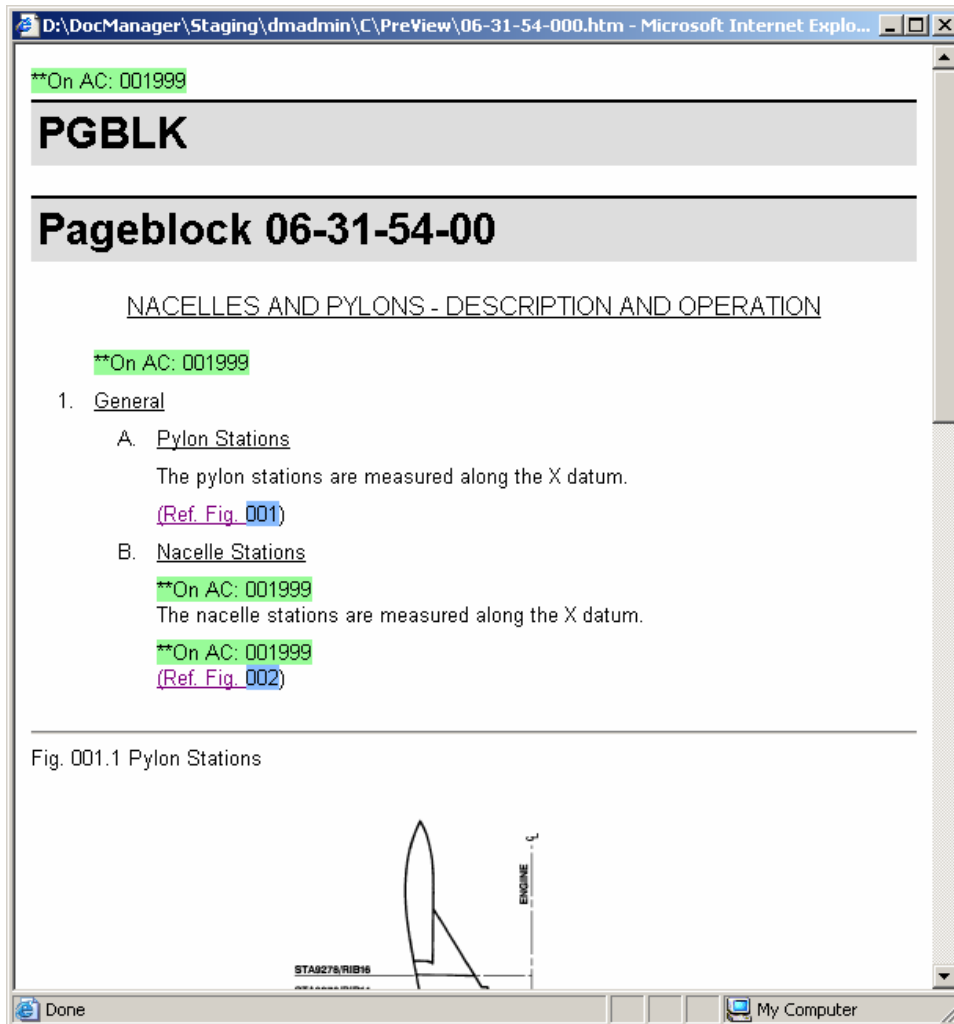
Changing the Default Workflow Assigned to a CR

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT to you want to work with.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to work with. The CAT is highlighted and its associated CRs are shown in the Change Request(s) list.

4. In Change Request(s) list, click the CR you want to work with.

5. In the **CR Operation** list box, select **ASSIGN WORKFLOW**.   The Setting Workflow dialog box appears.

Figure 7. **Setting Workflow Dialog Box**
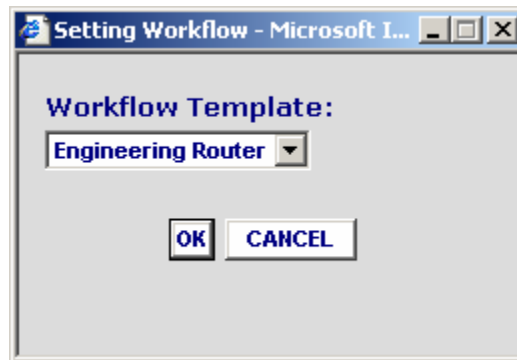
6. The Workflow Template box displays a list of workflow templates defined within DocManager. Select the workflow you want to assign to the CR and click **OK**.

    The workflow is assigned to the CR. The screen refreshes and the Change Request(s) list shows the new workflow.

Routing a CR

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT to you want to work with.   The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to work with. The CAT is highlighted and its associated CRs are shown in the Change Request(s) list.

4. In Change Request(s) list, click the CR you want to work with.

5. In the **CR Operation** list box, select **ROUTE**.

    Based on the workflow template assigned to the CR, the CR is immediately routed to the inboxes of the appropriate groups or users. The CAT screen refreshes and the Change Request(s) list shows the CR's status as "routed."

Viewing or Adding Comments to the CR Log

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT to you want to work with. The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to work with. The CAT is highlighted and its associated CRs are shown in the Change Request(s) list.

4. In Change Request(s) list, click the CR you want to work with.

5. In the **CR Operation** list box, select **CR LOG**. The CR Log screen appears.

Figure 8. **CR Log Dialog Box**

6. The left panel of the CR Log screen shows all comments previously entered for the selected CR. In the **New Log Entry** panel, you can enter alphanumeric text to create notes or special instructions for the CR.

7. To close the CR Log screen, click **OK**. The text entered, if any, is saved together with the date and time the text was entered and the name of the user who entered the text.

Removing (Deleting) a CR

1. Click the **CAT** tab. The Change Authorization Tracking (CAT) Records screen appears.

2. In the **CAT Type** list box, select the type of CAT to you want to work with. The Current CAT(s) list shows all existing CATs of the selected CAT Type.

3. In the Current CAT(s) list, click the CAT you want to work with. The CAT is highlighted and its associated CRs are shown in the Change Request(s) list.

4. In Change Request(s) list, click the CR you want to delete.

5. The message "The selected CR will be deleted" appears.

6. Click **Yes**. The CR is deleted from DocManager.

Chapter 6

Using the Inbox

After a Change Request (CR) has been created, it can be routed to the Inbox of one or more users based on the workflow template associated with the CR. From the Inbox, users can view and work with CRs.

There are three inboxes available from the Inbox tab:

- **CR Inbox**. The CR Inbox displays a list of all of the CRs the user is authorized to work with and all of the tasks the user is authorized to perform for each CR.

Authors can use the Authoring Functions to check publication fragments into and out of the DocManager data repository, modify publication content, and forward the CR onto the next step in the workflow. In addition, authors can insert a new fragment or delete an existing fragment.

Reviewers and approvers can use the CR operations to view the publication fragments and supporting documents associated with a CR, add comments to the CR log, and more.

The CR Inbox can be accessed by users such as authors, reviewers, and managers.

- **Management Inbox.** The Management Inbox is used to review a list of all CRs that have been routed, the user assigned to each CR, the status of each CR, and more.

From the Management Inbox an authorized user can view the fragment associated with a CR, add comments to the CR log, and reassign a CR to another user or group; however, users cannot access fragments for editing from the Management Inbox.

The Management Inbox can be accessed by managers only.

- **Notification Inbox**. The Notification Inbox feature is currently not available.

Accessing the Change Request (CR) Inbox

A user's CR Inbox displays a list of all of the CRs the user is authorized to work with and all of the tasks the user is authorized to perform for each CR.

To access the CR Inbox, click the **Inbox** tab. The Inbox screen appears.

Figure 1. **CR Inbox**

The CR Inbox contains four main areas: the menu bar, display filters, Author Functions, and a list of CRs.

- **CR Operations menu bar**. The buttons on the Inbox menu bar are typically used for reviewing and approving CRs; however, specific buttons may be enabled or disabled based on the tasks to be performed for the CR and the tasks a user is authorized to perform.

- **Author Functions**. The Author Functions list box allows users to check publication fragments into and out of the DocManager data repository, modify publication content, and insert or delete fragments from a publication.

  Author Functions are available only to users who have been assigned the role of author.

  Note: For information on assigning roles to users, see "Configuring Groups and Users."

- **Display filters**. The display filters allow users to view the CR list selectively based on Publication, ATA Number, CAT Type, Queue Date and Status.

- **CR list**. The lower portion of the screen displays a list of all of the CRs the user is authorized to work with.

Author Functions

The Author Functions list box allows users to check publication fragments into and out of the DocManager data repository, modify publication content, and insert or delete fragments from a publication.

Author Functions are available only to users who have been assigned the role of author.

Editing a Base-Level Fragment in XMetaL Author

From the CR Inbox, a user can select a fragment and edit its content in XMetaL Author. Only base-level fragments can be edited.

The base-level fragment for a publication is defined by the Publication Configuration associated with the publication.   Typically, the base level for an AMM publication is PGBLK, for an AIPC publication it is FIGURE, for an FCOM publication it is SECTION, and for an MEL publication it is ITEM.

This Author Function is available only to users who have been assigned the role of "Author" and only if XMetaL Author is installed on the user's computer.

To edit a base-level fragment:

1. Click the Inbox tab. The CR inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. In the A**uthor Functions** list box, select **Edit**.   DocManager automatically checks out the fragment associated with the CR and the fragment's descendants, if any.

    The XMetaL Author application is started. The Resource Manager panel appears in the left pane of the XMetaL window and the fragment is displayed in the right pane of the XMetaL window.

4. Make the appropriate changes to the fragment.

5. Click **Save** on the XMetaL Author toolbar to save your changes.

6. Check the fragment back into the DocManager data repository. You can check the fragment back into the DocManager data repository from either XMetaL Author or from the CR Inbox.

* To check in the fragment from XMetaL Author:

    Click **CheckIn** on the Resource Manager panel. The fragment is closed.

    After a moment, the message "Check-in Complete!" appears in the Resource Manager panel. The fragment has been checked back into the DocManager data repository. **IS THE STATUS CHANGED TO ACQUIRED?**

* To check in the fragment from the CR Inbox:

    Exit XMetaL Author.

    On the CR Inbox screen, click **Refresh**.

    Select **CheckIn** from the Author Functions list box. The fragment is checked back into the DocManager data repository and the CR's status changes to Acquired.

7. To forward the CR to the next step of the workflow, select the CR and click **Finish**.

Editing an Upper-Level Fragment

From the CR Inbox, a user can select an upper-level fragment, such as a chapter, for editing in XMetaL Author. When the fragment is selected for editing, the user has the option of checking out the upper-level fragment only or checking out the upper-level fragment and its descendants.

Editing an upper-level fragment <u>without</u> its descendants is typically used when a user wants to edit the fragment's title, effectivity, or Documentum attributes.

Editing an upper-level fragment <u>with</u> its descendants is typically used:

- When performing simple, repetitive editorial changes, such as spelling changes, that are required throughout the upper-level fragment and its descendants.

- When none of the descendant fragments have already been checked-out.

- When the order of descendant fragments will not be changed.

- When no descendant fragments will be deleted.

  Note: If it is necessary to delete descendant fragments, use the Delete feature. If a descendant fragment is deleted without using the "Delete" Author function, the change will not be marked appropriately for future processes, such as an OEM Revision Comparison or Release.

- When no descendant fragments will be added.

  Note: If it is necessary to add descendant fragments, use the Insert feature. If a descendant fragment is added without using the "Insert" Author function, the change will not be marked appropriately for future processes, such as an OEM Revision Comparison or Release.

- When the size of the fragment and its descendants will not adversely affect system performance.

  Note: All processing times will increase in proportion to the size of the DU.

Editing an Upper-Level Fragment's Title, Effectivity or Attributes

From the CR Inbox, a user can select an upper-level fragment and edit its title, effectivity, or Documentum attributes in XMetaL Author without loading the fragment's descendants. For example, for an AMM publication, an author could select and edit a chapter's title in XMetaL Author without also loading the sections, subjects, and page blocks associated with the chapter.

This Author Function is available only to users who have been assigned the role of "Author."

To edit a fragment's title, effectivity, or attributes:

1. Click the Inbox tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. In the Author Functions list box, select Edit. The message "Would you like to load descendants?" appears.

4. Click No. The fragment is checked out of the DocManager data repository without its descendants. The XMetaL Author application is started. The Resource Manager panel appears in the left pane of the XMetaL window and the fragment is displayed in the right pane of the XMetaL window.

5.   Make the appropriate changes to the fragment's title, effectivity or attributes.

6.   Click **Save** on the XMetaL Author toolbar to save your changes.

7.   Check the fragment back into the DocManager data repository. You can check the fragment back into the DocManager data repository from either XMetaL Author or from the CR Inbox.

•   To check in the fragment from XMetaL Author:

   Click **CheckIn** on the Resource Manager panel. The fragment is closed.

   After a moment, the message "Check-in Complete!" appears in the Resource Manager panel. The fragment has been checked back into the DocManager data repository. The CR's status changes to Acquired.

•   To check in the fragment from the CR Inbox:

   Exit XMetaL Author.

   On the CR Inbox screen, click **Refresh**.

   Select **CheckIn** from the Author Functions list box. The fragment is checked back into the DocManager data repository and the CR's status changes to Acquired.

8.   To forward the CR to the next step of the workflow, select the CR and click **Finish**.

Editing an Upper-Level Fragment and its Descendants

From the CR Inbox, a user can select an upper-level fragment and edit its title, effectivity, or attributes in XMetaL Author without loading the fragment's descendants.   For example, for an AMM publication, an author could select and edit a chapter's title in XMetaL Author without also loading the sections, subjects, and page blocks associated with the chapter.

This Author Function is available only to users who have been assigned the role of "Author."

To edit a fragment's title, effectivity, or attributes:

1.   Click the **Inbox** tab. The CR Inbox appears.

2.   From the listed CRs, click the CR you want to work with. The CR is highlighted.

3.   In the **Author Functions** list box, select **Edit**.   The message "Would you like to load descendants?" appears.

4.   Click **Yes**. The fragment and its descendants are checked out of the DocManager data repository. The XMetaL Author application is started. The Resource Manager panel appears in the left pane of the XMetaL window and the fragment is displayed in the right pane of the XMetaL window.

5.   Make the appropriate changes to the fragment.

6.   Click **Save** on the XMetaL Author toolbar to save your changes.

7.   Check the fragment back into the DocManager data repository. You can check the fragment back into the DocManager data repository from either XMetaL Author or from the CR Inbox.

   •   To check in the fragment from XMetaL Author:

> Click **CheckIn** on the Resource Manager panel. The fragment is closed.
>
> After a moment, the message "Check-in Complete!" appears in the Resource Manager panel. The fragment has been checked back into the DocManager data repository. The CR's status changes to Acquired.

- To check in the fragment from the CR Inbox:

> Exit XMetaL Author.
>
> On the CR Inbox screen, click **Refresh**.
>
> Select **CheckIn** from the Author Functions list box. The fragment is checked back into the DocManager data repository and the CR's status changes to Acquired.

8. To forward the CR to the next step of the workflow, select the CR and click **Finish**.

Inserting a Child Fragment into a Parent Fragment

From the CR Inbox, a user can insert a lower-level (child) fragment into an upper-level (parent) fragment. For example, for an AMM publication, an author could insert a section into a chapter.

This Author Function is available only to users who have been assigned the role of "Author."

To insert a child fragment into a parent fragment:

1. Click the Inbox tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

   Note: The fragment associated with the selected CR must be a higher level than the fragment to be inserted.

3. In the **Author Functions** list box, select **Insert**. The ATA Fragment Insertion dialog box appears.

4. Enter the following information:

New <Fragment> Name	Enter the name of the ATA fragment to be inserted. This name should be different from the existing ATA fragments listed in the dialog.
	This field is required.
Before or After	Select whether the new fragment will be inserted before or after an existing fragment.
Existing <Fragment> Names	Enter the name of the existing ATA fragment to which the new fragment will be inserted.
Title	Enter the title for the new fragment.
	This field is required.
Effectivity	The default value is 001999 but this value can be changed.
Revision Number	Enter the revision number, if any.
Revision Date	The default revision date is the current date but this

value can be changed.

5. Click **OK** button to close the dialog. DocManager creates the new child fragment and then replaces the parent fragment with the new child fragment in the Inbox.

The replacement is made available when the CR is finished.

Deleting a Fragment

From the CR Inbox, a user can delete a fragment from a publication.

Note: To delete an upper-level fragment, you must previously delete all of its descendants. For example, to be able to delete a subject within an AMM publication, all of the page blocks associated with the subject must be deleted first.

This Author Function is available only to users who have been assigned the role of "Author."

To delete a fragment:

1. Click the **Inbox** tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. In the **Author Functions** list box, select **Delete**.   The Inbox refreshes and the CR's status is shown as "deleted."

   *Note: To forward the deleted CR to the next step of the workflow, select the CR and click **Finish**. The fragment will be deleted when the CR is finished.*

Comparing Base-Level Fragments

From the CR Inbox, a user can compare one base-level fragment with another base-level fragment.

The base-level fragment for a publication is defined by the Publication Configuration associated with the publication.   Typically, the base level for an AMM publication is PGBLK, for an AIPC publication it is FIGURE, for an FCOM publication it is SECTION, and for an MEL publication it is ITEM.

This Author Function is available only to users who have been assigned the role of "Author" and only if XMetaL Author is installed on the user's computer.

To compare a base-level fragment with another version of the same fragment:

1. Click the **Inbox** tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. In the **Author Functions** list box, select **Edit**.

   The XMetaL Author application is started. The Resource Manager panel appears in the left pane of the XMetaL window and the fragment is displayed in the right pane of the XMetaL window.

4. At the bottom of the Resource Manager, click **Compare**. The Compare Documents dialog box appears.

5. Click one of the following options:

   Company Version   Compares the selected fragment with a different

version of the same fragment.

OEM Version	Compares the selected fragment with the most recent OEM Revision.
	This option is available only if an OEM Revision for the selected fragment exists.
Checked out Version	Compares your work in progress with a different version of the selected fragment.

6. Click Compare. DocManager compares the two versions of the fragment selected for comparison.

7. When the comparison is complete, the message "Comparison Complete" appears and the results are displayed in a READ-ONLY file.

Deleted text is displayed as: ~~Deleted Text~~

Modified text is displayed as: ~~Old Value~~ New Value

Added text is displayed as: Added Text

CR Operations

Reviewers and approvers can use the CR operations to acquire (lock) a CR, to view the publication fragments and supporting documents associated with a CR, to reassign a CR to another user or group, and to add comments to the CR log.

The CR Operations can be accessed by users assigned to the roles of reviewer, approver, or author.

Note: Some of the CR Operations may be unavailable based on the user's role or the status of the CR.

Previewing the Fragment Associated with a CR

To preview a fragment:

1. Click the **Inbox** tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. Click **Preview**.   A new window opens and displays the fragment associated with the CR.

4. The fragment is displayed in a browser in either HTML or PDF format depending on the fragment's file format. For example, FCOM fragments are displayed in PDF format. AIRBOOK fragments are displayed in HTML format.

    Note: If the user has been assigned the role of "author" and XMetaL Author is installed on the user's computer, the following types of fragments will be displayed in XML format:

- A high level fragment of a non-AMM manual that is loaded without descendants

- A high level fragment of an AMM manual loaded with or without descendants.

Viewing the Content of a Fragment

To view the content of a fragment:

1. Click the Inbox tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. Click **View**. If viewing a high level fragment, the message "Would you like to load descendants?" appears.

    - Click "Yes" to view the fragment with all of its child fragments.

    - Click "No" to view the fragment with its heading attributes only.

The XMetaL Author application starts and the fragment is displayed as a READ-ONLY file.

Reassigning a CR to Another Group or User

To reassign a CR to another user or group:

1. Click the **Inbox** tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to reassign. The CR is highlighted.

3. Click **ReAssign**.   The Route Selection dialog box appears.

Figure 2. **Route Selection Dialog Box**
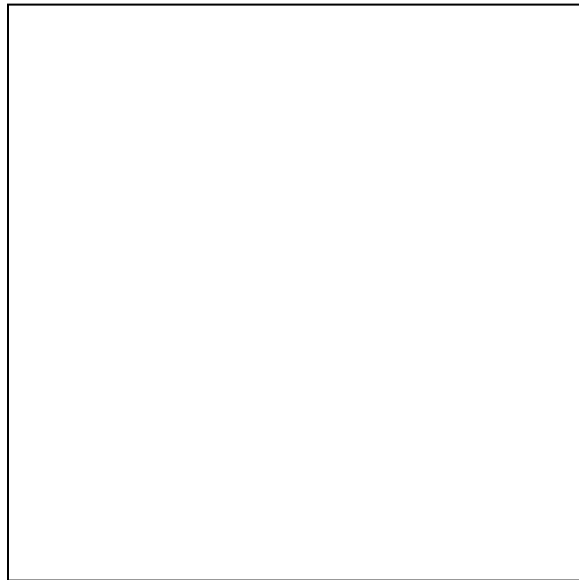
4. Complete the following:

User group	**All Groups** if you want to reassign the CR to another group of users.
	A specific Group if you want reassign the CR to another user from a specific group.
Reassign to	**A specific Group** if "All Groups" was selected from step 4 above.
	A specific User if "a specific Group" was selected from step 4 above.

4. Click **OK**. The CR is forwarded to the CR Inbox of the selected group or user.

Viewing or Adding Comments to the CR Log

Note: Once a comment is entered and saved in the CR Log, the comment cannot be deleted.

To view or add comments to the CR Log:

1. Click the **Inbox** tab. The CR Inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. Click **CR LOG**. The CR Log screen appears.

Figure 3. **CR Log**
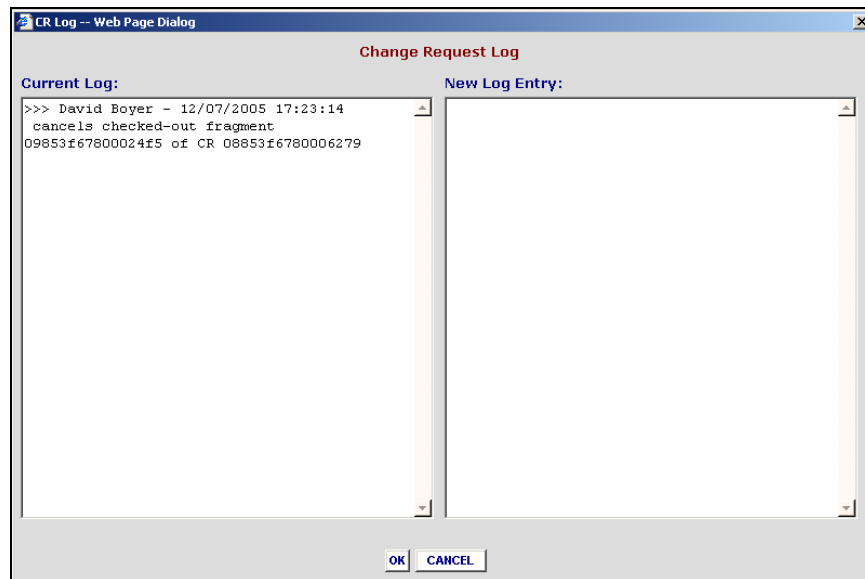
Figure 8. CR Log Dialog Box

- The left panel of the CR Log screen shows all comments previously entered for the selected CR. In the **New Log Entry** panel, you can enter alphanumeric text to create notes or special instructions for the CR.

- To close the CR Log screen, click **OK**. The text entered, if any, is saved together with the date and time the text was entered and the name of the user who entered the text.

Displaying the Fragment Details for a CR

- Click the **Inbox** tab. Your inbox appears.

- From the listed CRs, click the CR you want to work with. The CR is highlighted.

- Click **Details**. A panel opens on the left side of the screen and displays information for the CR and the fragment associated with the CR.

Figure 1. **CR Inbox**

The first section on top is the **CR Information** that displays all information related to the CR such as CAT Id, CR Id, Status, etc.… The section at the bottom is the **Fragment Information** that displays all the attributes of the fragment such as Publication, Name, Doc Unit, and so on.

Viewing the Supporting Documents Associated with a CR

Note: In order to have the Support Documents attached to a CR at runtime for viewing, three conditions must be done prior to routing the CR. First condition is to enable the Support Document feature for the working CAT Type from CAT Config screen (see "Configuring DocManager" for more information). Second condition is to import to the Support Document into the DocBase (see Importing Support Documents for more information) . Third condition is to add specific support document to the working CAT Type from CAT screen (see Creating CATs and CRs for more information).

To view the supporting documents that are attached to a CR:

1. Click the **Inbox** tab. Your inbox appears.

2. From the listed CRs, click the CR you want to work with. The CR is highlighted.

3. Click **SuppDoc**.   A panel opens on the left side of the screen and displays a list of the supporting documents associated with the CR.

Figure 1. **CR Inbox**

Support Document Panel

5. Click on a specific document from the list, the content of the document displays in the appropriate application basing on the document type.

Acquiring a CR

The Acquire function allows a user to lock a specific CR. Once acquired, the CR will only appear in the acquiring user's CR Inbox. The CR is not available to other users until the user finishes the workflow step; however, acquiring a CR does not immediately lock the fragment associated with the CR. The fragment is not locked until the fragment is checked out or selected for editing.

Note: If the CR was acquired in error or if the responsibility for completing the CR changes from one user to another, the CR can be reassigned to another user. See "Reassigning a CR to Another Group or User" for more information.

To acquire a CR:

1. Click the **Inbox** tab. Your inbox appears.

2. From the listed CRs, click the CR you want to acquire. The CR is highlighted.

3. Click **Acquire**.   The screen refreshes and the status of the selected CR is changed to "acquired." The selected CR is unavailable to other users.

Accessing the Management Inbox

The Management Inbox displays a list of all CRs that have been routed (but not completed), the user assigned to each CR, and the status of each CR.

From the Management Inbox an authorized user can view the fragment associated with a CR, add comments to the CR log, reassign a CR to another user or group, and more; however, users cannot access fragments for editing from the Management Inbox.

The Management Inbox can be accessed by managers only.

To access the Management Inbox:

1. Click the **Inbox** tab. The Inbox screen appears.

2. On the menu bar, click Management. The Management Inbox appears.

Figure 2. **Management Inbox**

The Management Inbox contains three main areas: the menu bar, display filters, and a list of CRs.

*   **CR Operations menu bar**. The buttons on the Inbox menu bar are similar to those on the CR Inbox menu bar. However, the Cancel button is a special function provided in Management inbox but not in CR inbox.

*   **Display filters**. The display filters allow users to view the CR list selectively based on Publication, ATA Number, CAT Type, Queue Date and Status.

*   **CR list**. The lower portion of the screen displays a list of all of the CRs the user is authorized to work with.

Cancelling a CR

This function is similar to the Cancel operation from the CR Operations in CAT screen. It's used in a special case where a working CR needs to be revert back to the beginning state. Managers can access the buttons on the menu bar just like in CR Inbox; however, specific buttons may be enabled or disabled based on the status of the CR..

To cancel a CR:

1. Click the **Inbox** tab. The CR Inbox appears.

2. On the menu bar, click **Management**. The Management Inbox appears.

4. From the listed CRs, click the CR you want to cancel. The CR is highlighted.

5. Click **Cancel**. The screen refreshes and the selected CR is removed completely from the inbox. The workflow that was using to route the CR is terminated. The status of the cancelled CR shows as "cancelled" in CAT screen.

Chapter 9

Locating Publications and Fragments

You can use the Locate screen to navigate and browse through the DocManager data repository and select fragments for viewing. DocManager supports two different views of the repository: the Publications View and the Repository View.

- The **Publications View** shows all publication folders in DocManager data repository and is typically used to locate and view a specific publication fragment.

- The **Repository View** shows all folders in the DocManager data repository except the System, Temp, and Templates folders. It can be used to locate supporting documents, to locate and view a publication fragment, and to review other DocManager resources.

You can use the Word Search feature available from the Reports screen to search for a publication that contains specific text.

Accessing the Publications View

To access the Publications View of the Locate screen, click the **Locate** tab. The Publications View of the Locate screen appears.

Figure 1. **Locate Screen - Publications View**

The Publications View shows all cabinets, folders, and files in the DocManager data repository for which a Publication Configuration ahs been defined. This information is presented in a directory tree format similar to Windows Explorer.

Note: For information on defining a Publication Configuration, see "Configuring DocManager."

At the highest level are cabinets. Each cabinet represents an aircraft model. When a user expands a cabinet, a folder is displayed for each type of publication that has been imported to the cabinet.

When a user expands a publication folder, a folder is displayed for each version of the publication that has been imported. For most publications, only the Company Edition and OEM Current folders are shown.
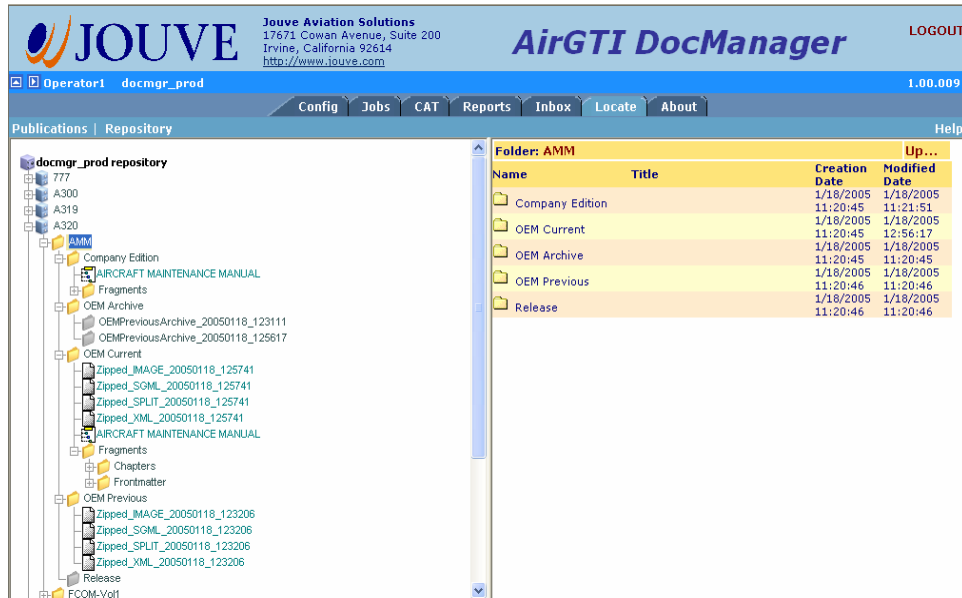
When a user expands a publication version folder, the fragments which comprise the publication are displayed. The actual level names of the fragments depend upon the publication "chunking levels" configured for the publication. Examples of "chunking levels" include chapters, sections, subjects, page blocks, and items. All fragments are displayed by ATA number.

When a user double-clicks a fragment, its properties are displayed in the right pane. The properties displayed in red apply to all versions of the selected document. The properties displayed in black apply to the selected version of the document only.

Based on the privileged assigned to the user, the Preview and/or View buttons will be displayed at the bottom of the fragment details pane (on the right side of the screen).

Figure 2. **Locate Screen - Publications View of File Properties**

Previewing a Fragment

1. Click the **Locate** tab. The Locate Screen Publications View appears and shows all publication cabinets in the DocManager data repository.

2. *Note: When a Publication Configuration is created, a cabinet for the aircraft model is created in the DocManager data repository. See "Configuring DocManager" for more information.*

3. Click to expand the cabinet (aircraft model) for the publication you want to work with. A list of all of the types of publications, such as AMM, FCOM, or MEL that have been imported to the cabinet is displayed.

4. Click to expand the publication you want to work with. Based on the number of versions of the publication that have been imported, a list of folders appears. One or more of the following folders may be displayed:

Company Edition	Contains the first version of publication imported to DocManager.
OEM Current	Contains all versions of the publication subsequent to the original version.
Release	Contains the most current version of the publication released by your company.

5. Click to expand the version of the publication you want to work with. A list of publication fragments appears.

   If more than one fragment level appears continue expanding the fragment levels to locate the fragment you want to view.

6. Double-click the fragment. The fragment details appear in the right panel of the Publications View screen.

7. In the Version list (at the bottom of the fragment details panel), select the version of the publication you want to work with. The screen is refreshed.

8. Click **Preview**. The fragment is displayed in a browser in either HTML or PDF format depending on the fragment's file format. For example, FCOM fragments are displayed in PDF format. AIRBOOK fragments are displayed in HTML format.

   Note: If the user has been assigned the role of "author" and XMetaL Author is installed on the user's computer, the following types of fragments will be displayed in XML format:

   - *A high level fragment of a non-AMM manual that is loaded without descendants*

   - *A high level fragment of an AMM manual loaded with or without descendants.*

Viewing a Fragment in XMetaL Author

Note: To view a fragment in XMetaL Author, the user must have the role of "author" and XMetaL Author must be installed on the user's computer:

1. Click the **Locate** tab. The Locate Screen Publications View appears and shows all publication cabinets in the DocManager data repository.

   Note: When a Publication Configuration is created, a cabinet for the aircraft model is created in the DocManager data repository. See "Configuring DocManager" for more information.

2. Click to expand the cabinet (aircraft model) for the publication you want to work with. A list of all of the types of publications, such as AMM, FCOM, or MEL, that have been imported to the cabinet, is displayed.

3. Click to expand the publication you want to work with. Based on the number of versions of the publication that have been imported, a list of folders appears. One or more of the following folders may be displayed:

Company Edition	Contains the first version of publication imported to DocManager.
OEM Current	Contains all versions of the publication subsequent to the original version.
Release	Contains the most current version of the publication released by your company.

4. Click to expand the version of the publication you want to work with. A list of publication fragments appears.

   If more than one fragment level appears continue expanding the fragment levels to locate the fragment you want to view.

5. Double-click the fragment. The fragment details appear in the right panel of the Publications View screen.

6. In the Version list (at the bottom of the fragment details panel), select the version of the publication you want to work with. The screen is refreshed.

7. Click **View**. If viewing a high level fragment, the message "Would you like to load descendants?" appears.

   - Click "Yes" to view the fragment with all of its child fragments.

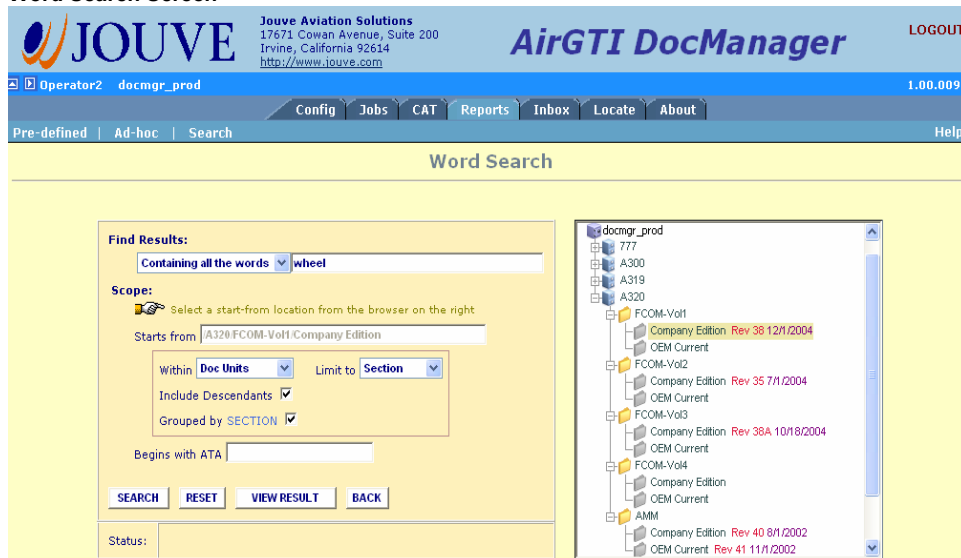   - Click "No" to view the fragment with its heading attributes only.

   The XMetaL Author application starts and the fragment is displayed as a READ-ONLY file.

Accessing the Repository View

To access the Repository View of the Locate screen:

1. Click the **Locate** tab. The Publications View of the Locate screen appears.

2. On the menu bar, click **Repository**. The Repository View of the Locate screen appears.

Figure 3. **Locate Screen – Repository View of Folder Contents**

The Repository View shows all cabinets, folders, and files in the DocManager data repository (except for the System, Temp, and Templates folders). This information is presented in a directory tree format similar to Windows Explorer.

Each cabinet contains folders. When a user double-clicks a folder, the subfolders and files contained in the folder are listed in the right pane. In the right pane, the user can continue opening (double-clicking) sub-folders to locate files including SGML & XML files, split data files, and associated image files.

A user can double-click an XML file to open the file in XMetaL Author. Currently only XML documents are supported for viewing.

Figure 4. **Locate Screen – Repository View of Folder Contents**

Viewing a Fragment in XMetaL Author

Note: To view a fragment in XMetaL Author, the user must have the role of "author" and XMetaL Author must be installed on the user's computer:

1. Click the **Locate** tab. The Locate Screen Publications View appears.

2. In the menu bar, click **Repository**. The Locate Screen Repository View appears. A list of all cabinets in the DocManager data repository is displayed. One or more of the following folders may be displayed:

Publication Cabinets	Contains all of the types of publications, such as AMM, FCOM, or MEL that have been imported to the cabinet for the selected aircraft model.
Support Documents	Contains all of the supporting documents that have been imported into DocManager.

3. Click to expand the publication cabinet (aircraft model) you want to work with.   A list of all of the types of publications, such as AMM, FCOM, or MEL that have been imported to the cabinet is displayed.

4. Click to expand the publication you want to work with. Based on the number of versions of the publication that have been imported, a list of folders appears. One or more of the following folders may be displayed:

Company Edition	Contains the first version of publication imported to DocManager.
OEM Archive	
OEM Current	Contains all versions of the publication subsequent to the original version.
OEM Previous	Contains the previous OEM Revision of the publication.
Release	Contains the most current version of the publication

released by your company.

5. Double-click the folder that contains the version of the publication you want to work with. A list of the files contained in the folder is displayed in the right pane.

If more than one folder level appears continue double-clicking folders in the right pane to locate the fragment you want to view.

6. Double-click the fragment. If viewing a high level fragment, the message "Would you like to load descendants?" appears.

- Click "Yes" to view the fragment with all of its child fragments.

- Click "No" to view the fragment with its heading attributes only.

The XMetaL Author application starts and the fragment is displayed as a READ-ONLY file.

Accessing the Word Search Screen

To access the Word Search screen:

1. Click the **Report** tab.

2. On the menu bar, click **Search.** Th+e Word Search screen appears.

Figure 5. **Word Search Screen**

The Word Search screen is divided into two main sections: Find Results and Scope.

- **Find Results** is where the search text is entered.

- **Scope** is where the filter criteria for the search is defined.

Searching for Specific Text

1. Click the **Report** tab.

2. On the menu bar, click **Search**. The Word Search screen appears.

3. Complete the following information:

Find Results	Select one of the following options:	
	Containing all the words	DocManager will search for fragments that contain all of the words entered in the Find Results text box. Fragments that do not contain all of the words will not be displayed.
	With the exact phrase	DocManager will search for fragments that contain the exact phrase entered in the Find Results text box. Fragments that do not contain the exact phrase will not be displayed.
	With any of the word	DocManager will search for fragments that contain one or more of the words entered in the Find Results text box.
	In the text box to the right of the Find Results field, enter the text to be searched for. The text entered is not case sensitive.	
Starts from	In the browser on the right side of the screen, select the cabinet or folder where the search will begin. Once a location is selected from the browser, it will automatically be inserted into the Start from text box.	
Within	Selects the portion of the publication that will be searched:	
	All	Searches all portions of the publication including the front matter, all document units, and sheet titles.
	Front Matter	Searches only the front matter of the publication.
	Doc Units	Searches only the document units of the publication. Examples of document units include, but are not limited to chapters, sections, and page blocks.
	Sheet Titles	Searches only the sheet titles of the publication.
Limit to	Selects the lowest doc unit level from the Limit to pull-down list. Depending on the manual type, the doc unit levels will be different.	

In addition to the *Start from* filter criteria, the document unit level can be specified. It can be limited to Front Matter, Doc Units, or Sheet Titles as preferred. If the *Doc Units* option is selected, the level of the document unit can also be selected, such as Chapter, Section, Subject, Page Block, or Task. These level options depend upon the type of publication chosen to search.

Include descendants	By default this check box is checked to include children fragments in the search. The user can un-check it if he/she doesn't want to search below the specified fragment's document unit level.
Group by base-level	Selects this criterion if user wants the search result to be grouped by the base-level. Depending on the type of manual, the base-level will be different. For example, for FCOM the base level is SECTION.
Begins with ATA	Enters the ATA number in this field if user knows exactly what fragment containing the word search. This will make the search faster. For the "*Begins with ATA*" filter, a segment of an ATA number, or the whole ATA number, can be entered.

4. Click **SEARCH** to begin searching publications for specified text. DocManager displays a list of the fragments that contain the specified text. An example is shown in Figure 6.

   - To view one of the listed fragments in the publications browser, click PDF View.

   - To view one of the listed fragments in XMetaL, click XML View.

Figure 6. **Word Search Sample Results**

Chapter 9

Locating Publications and Fragments

You can use the Locate screen to navigate and browse through the DocManager data repository and select fragments for viewing. DocManager supports two different views of the repository: the Publications View and the Repository View.

- The **Publications View** shows all publication folders in DocManager data repository and is typically used to locate and view a specific publication fragment.

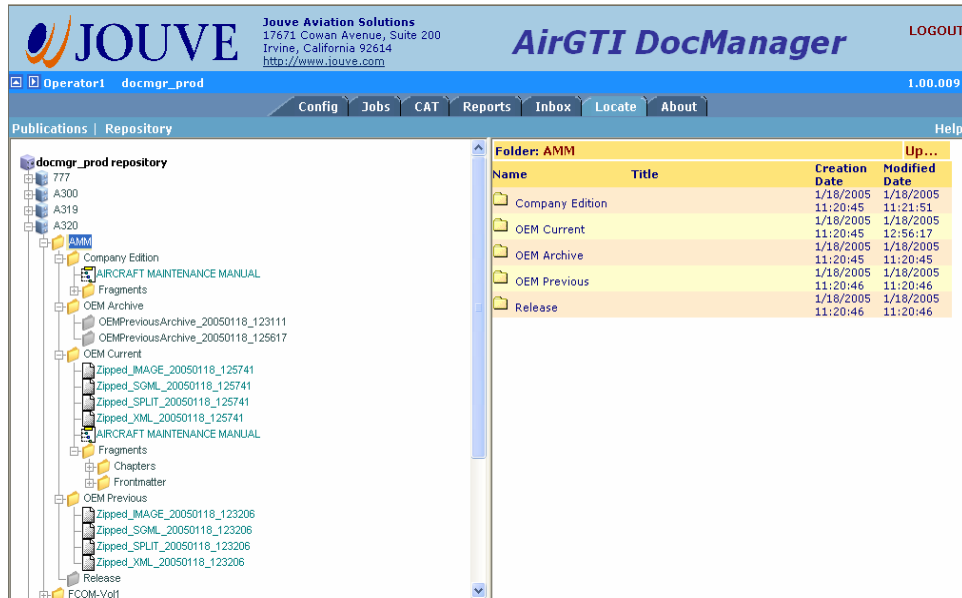- The **Repository View** shows all folders in the DocManager data repository except the System, Temp, and Templates folders. It can be used to locate supporting documents, to locate and view a publication fragment, and to review other DocManager resources.

You can use the Word Search feature available from the Reports screen to search for a publication that contains specific text.

Accessing the Publications View

To access the Publications View of the Locate screen, click the **Locate** tab. The Publications View of the Locate screen appears.

Figure 1. **Locate Screen - Publications View**

The Publications View shows all cabinets, folders, and files in the DocManager data repository for which a Publication Configuration ahs been defined. This information is presented in a directory tree format similar to Windows Explorer.

Note: For information on defining a Publication Configuration, see "Configuring DocManager."

At the highest level are cabinets. Each cabinet represents an aircraft model. When a user expands a cabinet, a folder is displayed for each type of publication that has been imported to the cabinet.

When a user expands a publication folder, a folder is displayed for each version of the publication that has been imported. For most publications, only the Company Edition and OEM Current folders are shown.

When a user expands a publication version folder, the fragments which comprise the publication are displayed. The actual level names of the fragments depend upon the publication "chunking levels" configured for the publication. Examples of "chunking levels" include chapters, sections, subjects, page blocks, and items. All fragments are displayed by ATA number.

When a user double-clicks a fragment, its properties are displayed in the right pane. The properties displayed in red apply to all versions of the selected document. The properties displayed in black apply to the selected version of the document only.

Based on the privileged assigned to the user, the Preview and/or View buttons will be displayed at the bottom of the fragment details pane (on the right side of the screen).

Figure 2. **Locate Screen - Publications View of File Properties**

Previewing a Fragment

1. Click the **Locate** tab. The Locate Screen Publications View appears and shows all publication cabinets in the DocManager data repository.

2. *Note: When a Publication Configuration is created, a cabinet for the aircraft model is created in the DocManager data repository. See "Configuring DocManager" for more information.*

3. Click to expand the cabinet (aircraft model) for the publication you want to work with. A list of all of the types of publications, such as AMM, FCOM, or MEL that have been imported to the cabinet is displayed.

4. Click to expand the publication you want to work with. Based on the number of versions of the publication that have been imported, a list of folders appears. One or more of the following folders may be displayed:

Company Edition	Contains the first version of publication imported to DocManager.
OEM Current	Contains all versions of the publication subsequent to the original version.
Release	Contains the most current version of the publication released by your company.

5. Click to expand the version of the publication you want to work with. A list of publication fragments appears.

   If more than one fragment level appears continue expanding the fragment levels to locate the fragment you want to view.

6. Double-click the fragment. The fragment details appear in the right panel of the Publications View screen.

7. In the Version list (at the bottom of the fragment details panel), select the version of the publication you want to work with. The screen is refreshed.

8. Click **Preview**. The fragment is displayed in a browser in either HTML or PDF format depending on the fragment's file format. For example, FCOM fragments are displayed in PDF format. AIRBOOK fragments are displayed in HTML format.

   Note: If the user has been assigned the role of "author" and XMetaL Author is installed on the user's computer, the following types of fragments will be displayed in XML format:

   - *A high level fragment of a non-AMM manual that is loaded without descendants*

   - *A high level fragment of an AMM manual loaded with or without descendants.*

Viewing a Fragment in XMetaL Author

Note: To view a fragment in XMetaL Author, the user must have the role of "author" and XMetaL Author must be installed on the user's computer:

1. Click the **Locate** tab. The Locate Screen Publications View appears and shows all publication cabinets in the DocManager data repository.

   Note: When a Publication Configuration is created, a cabinet for the aircraft model is created in the DocManager data repository. See "Configuring DocManager" for more information.

2. Click to expand the cabinet (aircraft model) for the publication you want to work with. A list of all of the types of publications, such as AMM, FCOM, or MEL, that have been imported to the cabinet, is displayed.

3. Click to expand the publication you want to work with. Based on the number of versions of the publication that have been imported, a list of folders appears. One or more of the following folders may be displayed:

Company Edition	Contains the first version of publication imported to DocManager.
OEM Current	Contains all versions of the publication subsequent to the original version.
Release	Contains the most current version of the publication released by your company.

4. Click to expand the version of the publication you want to work with. A list of publication fragments appears.

   If more than one fragment level appears continue expanding the fragment levels to locate the fragment you want to view.

5. Double-click the fragment. The fragment details appear in the right panel of the Publications View screen.

6. In the Version list (at the bottom of the fragment details panel), select the version of the publication you want to work with. The screen is refreshed.

7. Click **View**. If viewing a high level fragment, the message "Would you like to load descendants?" appears.

   - Click "Yes" to view the fragment with all of its child fragments.

   - Click "No" to view the fragment with its heading attributes only.

   The XMetaL Author application starts and the fragment is displayed as a READ-ONLY file.

Accessing the Repository View

To access the Repository View of the Locate screen:

1. Click the **Locate** tab. The Publications View of the Locate screen appears.

2. On the menu bar, click **Repository**. The Repository View of the Locate screen appears.

Figure 3. **Locate Screen – Repository View of Folder Contents**

The Repository View shows all cabinets, folders, and files in the DocManager data repository (except for the System, Temp, and Templates folders). This information is presented in a directory tree format similar to Windows Explorer.

Each cabinet contains folders. When a user double-clicks a folder, the subfolders and files contained in the folder are listed in the right pane. In the right pane, the user can continue opening (double-clicking) sub-folders to locate files including SGML & XML files, split data files, and associated image files.

A user can double-click an XML file to open the file in XMetaL Author. Currently only XML documents are supported for viewing.

Figure 4. **Locate Screen – Repository View of Folder Contents**

Viewing a Fragment in XMetaL Author

Note: To view a fragment in XMetaL Author, the user must have the role of "author" and XMetaL Author must be installed on the user's computer:

1. Click the **Locate** tab. The Locate Screen Publications View appears.

2. In the menu bar, click **Repository**. The Locate Screen Repository View appears. A list of all cabinets in the DocManager data repository is displayed. One or more of the following folders may be displayed:

Publication Cabinets	Contains all of the types of publications, such as AMM, FCOM, or MEL that have been imported to the cabinet for the selected aircraft model.
Support Documents	Contains all of the supporting documents that have been imported into DocManager.

3. Click to expand the publication cabinet (aircraft model) you want to work with.   A list of all of the types of publications, such as AMM, FCOM, or MEL that have been imported to the cabinet is displayed.

4. Click to expand the publication you want to work with. Based on the number of versions of the publication that have been imported, a list of folders appears. One or more of the following folders may be displayed:

Company Edition	Contains the first version of publication imported to DocManager.
OEM Archive	
OEM Current	Contains all versions of the publication subsequent to the original version.
OEM Previous	Contains the previous OEM Revision of the publication.
Release	Contains the most current version of the publication

released by your company.

5. Double-click the folder that contains the version of the publication you want to work with. A list of the files contained in the folder is displayed in the right pane.

If more than one folder level appears continue double-clicking folders in the right pane to locate the fragment you want to view.

6. Double-click the fragment. If viewing a high level fragment, the message "Would you like to load descendants?" appears.

- Click "Yes" to view the fragment with all of its child fragments.

- Click "No" to view the fragment with its heading attributes only.

The XMetaL Author application starts and the fragment is displayed as a READ-ONLY file.

Accessing the Word Search Screen

To access the Word Search screen:

1. Click the **Report** tab.

2. On the menu bar, click **Search.** Th+e Word Search screen appears.

Figure 5. **Word Search Screen**

The Word Search screen is divided into two main sections: Find Results and Scope.

- **Find Results** is where the search text is entered.

- **Scope** is where the filter criteria for the search is defined.

Searching for Specific Text

1. Click the **Report** tab.

2. On the menu bar, click **Search**. The Word Search screen appears.

3. Complete the following information:

Find Results	Select one of the following options:	
	Containing all the words	DocManager will search for fragments that contain all of the words entered in the Find Results text box. Fragments that do not contain all of the words will not be displayed.
	With the exact phrase	DocManager will search for fragments that contain the exact phrase entered in the Find Results text box. Fragments that do not contain the exact phrase will not be displayed.
	With any of the word	DocManager will search for fragments that contain one or more of the words entered in the Find Results text box.
	In the text box to the right of the Find Results field, enter the text to be searched for. The text entered is not case sensitive.	
Starts from	In the browser on the right side of the screen, select the cabinet or folder where the search will begin. Once a location is selected from the browser, it will automatically be inserted into the Start from text box.	
Within	Selects the portion of the publication that will be searched:	
	All	Searches all portions of the publication including the front matter, all document units, and sheet titles.
	Front Matter	Searches only the front matter of the publication.
	Doc Units	Searches only the document units of the publication. Examples of document units include, but are not limited to chapters, sections, and page blocks.
	Sheet Titles	Searches only the sheet titles of the publication.
Limit to	Selects the lowest doc unit level from the Limit to pull-down list. Depending on the manual type, the doc unit levels will be different.	

In addition to the *Start from* filter criteria, the document unit level can be specified. It can be limited to Front Matter, Doc Units, or Sheet Titles as preferred. If the *Doc Units* option is selected, the level of the document unit can also be selected, such as Chapter, Section, Subject, Page Block, or Task. These level options depend upon the type of publication chosen to search.

Include descendants	By default this check box is checked to include children fragments in the search. The user can un-check it if he/she doesn't want to search below the specified fragment's document unit level.
Group by base-level	Selects this criterion if user wants the search result to be grouped by the base-level. Depending on the type of manual, the base-level will be different. For example, for FCOM the base level is SECTION.
Begins with ATA	Enters the ATA number in this field if user knows exactly what fragment containing the word search. This will make the search faster.
	For the "*Begins with ATA*" filter, a segment of an ATA number, or the whole ATA number, can be entered.

4. Click **SEARCH** to begin searching publications for specified text. DocManager displays a list of the fragments that contain the specified text. An example is shown in Figure 6.

- To view one of the listed fragments in the publications browser, click PDF View.

- To view one of the listed fragments in XMetaL, click XML View.

Figure 6. **Word Search Sample Results**

Chapter 7

Reports

DocManager provides a set of predefined reports that show the details and status of OEM Revision comparisons, OEM Revision reconciliations, CATs, CRs, and DocManager jobs. DocManager also provides a method to design and save custom (ad-hoc) reports. Any DocManager user can create and view reports.

The pre-defined reports allows you to view reports for the following categories:

- **OEM Revision Comparison Conflicts**. The reports in this category focus on information about fragments where a conflict exists between the OEM Revision and the company revision. OEM Revision Comparison Conflict reports can be viewed for all fragments or for the fragments associated with a specific CAT.

- **OEM Revision Change Incorporation Status**. The reports in this category focus on information about the status of OEM revision comparison reconciliations. OEM Revision Change Incorporation Status reports can be viewed for all CATs or for a specific CAT. You can also limit the report to list the reconciliations performed by all authors or by a specific author.

- **CAT, CR & Job Details**. The reports in this category show detailed information for CATs, CRs, and DocManager jobs.

- **System Maintenance**. This report is designed to assist DocManager administrators (and database administrators) who need to monitor table sizes and data usage trends.

The **Ad-hoc Report** screen allows users to design reports by selecting the information to be included on the report, the order in which information is sorted, and more. Typically an ad-hoc report is used to view information about CATs, CRs, and DocManager jobs. Several sample ad-hoc reports are provided with DocManager.

Accessing the Predefined Reports Screen

You can access the Pre-defined Reports screen from the Reports tab or from the CAT tab. If you want to print the OEM Revisions Comparison Report for a specific CAT, use the CAT tab to access the Pre-defined Report screen.

- To access the Pre-defined Reports screen from the Reports tab, simply click the **Reports** tab. The Pre-defined Reports screen appears.

- To access the Pre-defined Reports screen from the CAT tab:

  1. Click the **CAT** tab. The Change Authorization Tracking Record (CAT) screen appears.

  2. In the **CAT Type** list box, select **OEM Revision**.

  3. From the list of CATs, select the CAT for which you want to view a report.

  4. Click **Report**. The Pre-defined Reports screen appears. The ID number of the selected CAT appears in the CAT ID box.

Figure 1. **Pre-defined Reports Screen**
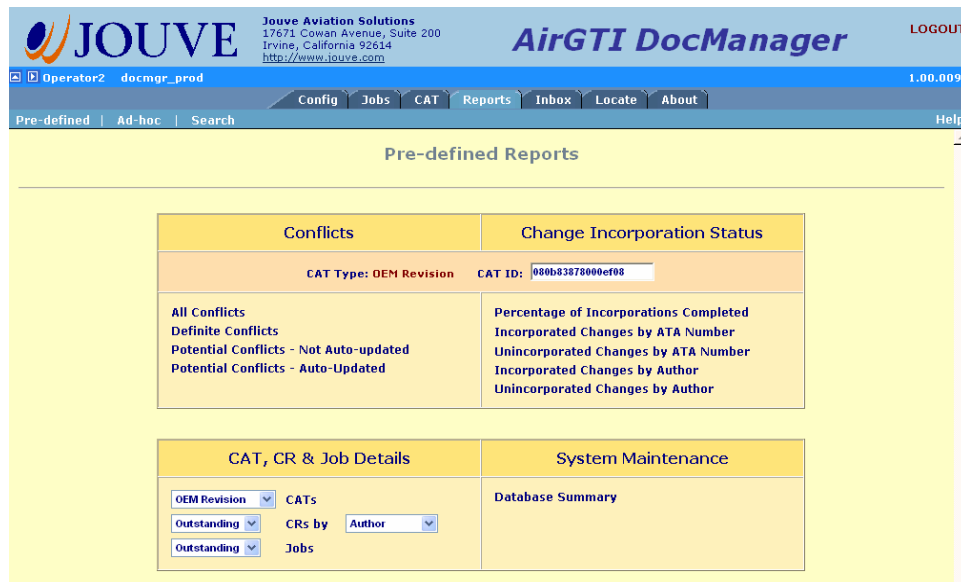
The Pre-defined Reports screen is divided into four categories:

- **OEM Revision Comparison Conflicts**. The reports in this category focus on information about fragments where a conflict exists between the OEM Revision and the company revision.

- **OEM Revision Change Incorporation Status**. The reports in this category focus on information about the status of OEM revision comparison reconciliations.

- **CAT, CR & Job Details**. The reports in this category show detailed information for CATs, CRs, and DocManager jobs.

- **System Maintenance**. This report is designed to assist DocManager administrators (and database administrators) who need to monitor table sizes and data usage trends.

OEM Revision Comparison Conflict Reports

Four pre-defined reports are available for viewing information where conflicts exist between the OEM Revision and the Company Edition of a publication.

- All Conflicts

- Definite Conflicts

- Potential Conflicts – Not Auto-Updated

- Potential Conflicts – Auto-Updated

All Conflicts Report

Figure 2. **Sample All Conflicts Report**

Upper portion of the screen shows:

Date

CAT Type

CAT ID

Count

In the body of the report a summary line is shown for the CAT:

CAT Desc

Owner

Created

Publication

Label

Designation

In the body of the report the following information is shown for each fragment:

ATA Number

Author

Doc Unit

CHG Tag

Anchor Key

Definite Conflict

Auto Update

Special Instructions

Definite Conflicts Report

Figure 2. **Sample Definite Conflicts Report**

Potential Conflicts Reports

Figure 2. **Sample Potential Conflicts Report**

OEM Change Incorporation Status Reports

Five pre-defined reports are available for viewing information about the status and details of OEM Revision comparison reconciliations.

- Percentage of Incorporations Completed
- Incorporated Changes by ATA Number
- Unincorporated Changes by ATA Number
- Incorporated Changes by Author
- Unincorporated Changes by Author

Figure 2. **Sample Percentage of Incorporations Completed**

Figure 2. **Sample Incorporated Changes by ATA Number**

Figure 2. **Sample Unincorporated Changes by Author**

CAT, CR, and Job Details Reports

 Five pre-defined reports are available for viewing information about the status and details of OEM Revision comparison reconciliations.

- CAT Details Report

- CR Details Report

- Jobs Details Report

Figure 3. Sample CAT Details Report (All CATs selected)
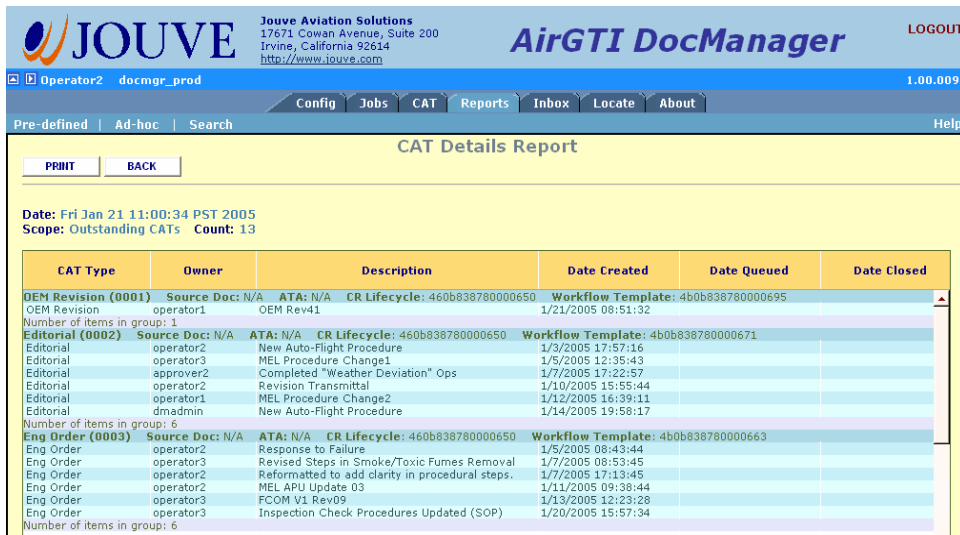
Upper portion of the screen shows:

 Date

 Scope

 Count

In the body of the report a summary line is shown for the CAT:

 CAT Type

 Owner

In the body of the report the following information is shown for each fragment:

 CAT Type

 Owner

 Description

 Date Crated

 Date Queued

Date Closed

Figure 3. **Sample CR Details Report**

Figure 3. **Sample Job Details Report**

Upper portion of the screen shows:

Date

Scope

Count

In the body of the report the following information is shown for each job:

Job Name

Model Name

Publication Type

Job Status

Job Owner

Start Date

System Maintenance Report

The System Maintenance Report is designed to assist DocManager administrators (and database administrators) who need to monitor table sizes and data usage trends. For more information, see the *DocManager Administration Guide*.

Accessing the Ad-hoc Reports Screen

To access the Ad-hoc Reports screen:

1. Click the Reports tab. The Pre-defined Reports screen appears.

2. On the menu bar, click Ad-hoc. The Ad-hoc Reports screen appears.

Figure X. **Ad-hoc Report screen (upper section only)**

Creating an Ad-hoc Report

1. Click the **Reports** tab. The Pre-defined Reports screen appears.

2. One the menu bar, click **Ad-Hoc**. The Ad-Hoc Reports screen appears.

Report Title	Enter a name to describe the report.
Column	Select the information to be included on the report by clicking the icon to the left of the selection (column). A brief description of each selection is shown in the Column Title column. This is required.
Output Order	Output Order as desire by changing the index number on the Output Order text box. This is optional.
Criteria	Defines the criteria for a specific selected row if any to narrow down the search. This is optional.
Sort Type	Specifies the Sort Type as Ascending or Descending, or the Sort Order using the index number. This is optional.
Sort Order	
P	

3. **Viewing the DQL Query:** After all the properties are defined, clicks on the Refresh/Show DQL Query button. The system will display the defined query in the DQL Query list box. This is optional.

4. **The system generates the report:** After all the above steps are done, the user finally clicks on the RUN REPORT button to execute the query.

Figure 38-1 displays the Ad-hoc report screen with DQL information shown in the text box. From this screen, the report query criteria can be visually inspected and fine-tuned.

Figure 38-2 displays the "Get Saved Query" dialog box where all available saved queries are listed. From this list a query can be selected to run "as-is", or selected to serve as a template for a new query. The title and file name of the saved queries can be utilized to describes what information is displayed, and how it is organized.
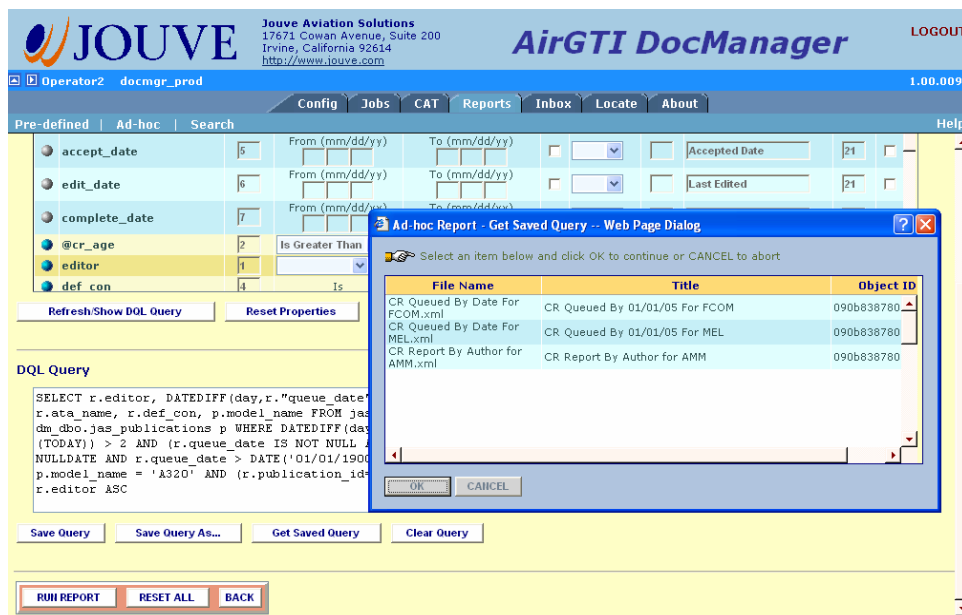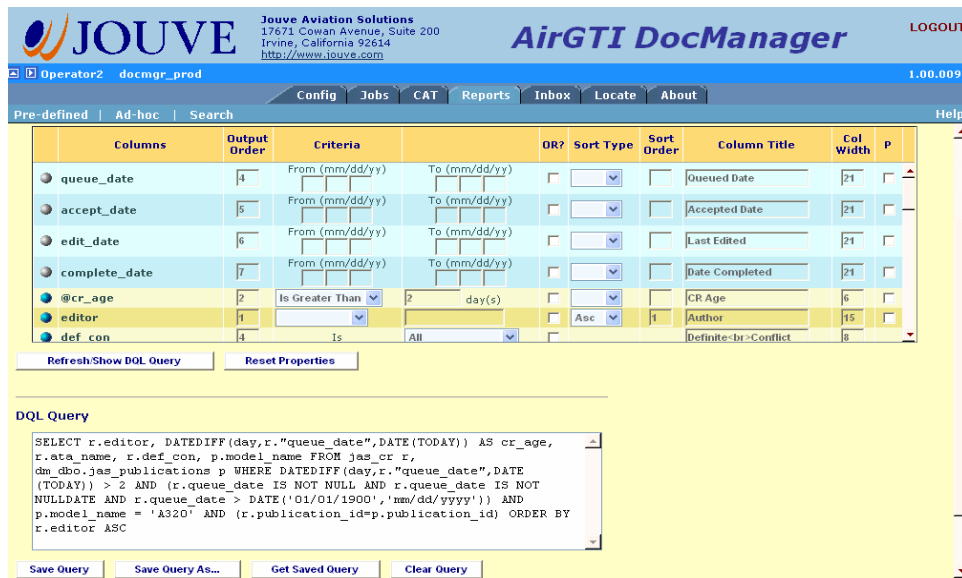
Figure 38-2

Figure 38-3 displays sample output from an Ad-hoc report query:

Report Column Selections

CR Information

Selection	Description
Queue Date	Shows CRs that were created on a specific date or range of dates.
Accept Date	Shows CRs that were acquired on a specific date or within a range of dates.
Edit Date	Shows CRs that were edited on a specific date or within a range of dates.
Complete Date	Shows CRs that were completed on a specific date or range of dates.
@CR Age	Lists CRs by the length of time they have been "open."
Editor	Shows a list of CRs and the user who authored the CR or shows all CRs authored by as specific user.
Doc Unit	
ATA Type	
Rev Date	
Start Date	
End Date	
Checkout Date	

CAT Information

Model Name	Shows the aircraft model for the CAT or shows all CATS created for a specific aircraft model.	
Publication Type	Shows the type of publication, such as AMM, FCOM, MEL, or AIPC.	
CAT Type	Shows the CAT Type, such as OEM Revision, Editorial, Eng Order, or Effectivity.	
CAT Owner	The name of the user who created the CAT.	
CAT Description	The description entered when the CAT was created.	
OEM Revision Date		
OEM Revision TSN	Version number of OEM	
Def Con	Y	A conflict exists between the Company Edition and the OEM Revision.
	N	No conflict exists between the Company Edition and the OEM Revision.

Auto Update

Chg	R	Revised
	N	New
	D	Deleted
	U	Unchanged
Special Instructions	Shows text from the CR log.	
Anchor Key		

Job Information

Job Name	Shows jobs having a specific name or lists all jobs by job name.
Job Owner	Shows a list of jobs and the name of the user who started the job.
Status	Shows jobs having a specific status or shows all jobs and the current status of each job.

DocManager Data Repository Objects

The following selections are typically used by the DocManager administrator to locate specific objects within the DocManager data repository for troubleshooting purposes.

CAT ID	A unique internal ID assigned to the CAT by DocManager.
R Object ID	Documentum object ID
Publication ID	A unique internal ID assigned to the publication by DocManager.
Job ID	A unique internal ID assigned to the job by DocManager.
Frag Doc ID	A unique internal ID assigned to the fragment by DocManager.
Workflow Template ID	A unique internal ID assigned to the workflow by DocManager.

Appendix A

Using Support Documents

Configure the CAT Type to Include Support Documents

1. Click the **Config** tab.

2. Click **CAT** on the menu bar. The Change Authorization & Tracking Configuration screen appears.

3. From the CAT Types listed in the lower portion of the screen, select the CAT Type for which you want to enable support documents.

4. To enable support documents, click to place a checkmark in the Support Document box.

Figure 1. **Change Authorization & Tracking Configuration**

Import the Support Documents to DocManager

To import a supporting document into DocManager:

1. Copy the supporting document you want to import into a folder and directory accessible by the DocManager mid-tier server. Typically, this will be a folder in the \DocManager\Data directory.

2. Log into DocManager.

3. Click the CAT tab. The Change Authorization Tracking Record (CAT) screen appears.

4. Click Import **Support Doc**. The Import Support Document screen appears.

Figure 2. **Import Suport Document Screen**

5. Complete the information:

Source	Enter the (source) path of the supporting document you want to import. This path must be accessible by the DocManager mid-tier server. For example: \\machine_name\drive_letter\folder\...\file.ext.
File Type	Select the format of the source file: PDF, Microsoft Word, or Text.
Destination	Enter the (destination) path to which you want to import the supporting document. This destination should be a fully qualified Documentum folder path. For example: /Support Documents/Common.

Doc. Title   Enter the name of the supporting document. This will be displayed as the document name in the DocManager data repository.

This field is optional.

6. Click **Go** to begin importing the document. When the import process is complete, the message "Import Successful" appears.

7. Click **OK** to close the message dialog box.

Note: The Locate screen can be used to verify that a publication or document has been imported. Refer to "Locating Publications, Fragments, and Documents" for more information.

Add Specific Support Documents to a CAT

After a CAT Type is configured to include supporting documents, a **Document Browse** button is displayed on the CAT form. This button is similar to the **Publication Browse** button, and when clicked displays data repository folders in a tree structure within the left pane. A user can navigate through repository folders to select support documents to attach to the CAT. When the "ADD" button at the bottom of the left pane is clicked, selected documents are transferred to the Support Documents field on the CAT form. Either a single document, or multiple documents, can be selected as required.

Note: Support Documents are normally formatted as MS WORD, Plain Text, or PDF files.

Figure 3. **Change Authorization & Tracking Recrods Screen**

View the Support Document from the Inbox

When a CR of this CAT Type (which is configured to include supporting documents) is created and routed to the Inbox, the author will be able to view these added documents attaching to the CR. With the routed CR selected from Inbox, clicking on the SuppDoc button will load up the added documents on the left pane. To view each document simply clicks (single-click) on a specific document and it will be displayed in a separate browser.

Figure 4. **CR Inbox**

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