Document Control Portal

User's Learning Guide

Prepared for



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Version 1.0

Prepared by



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Revision and Signoff Sheet

Change Record

Date	Author	Version	Change reference
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28-Dec-2011	Vineet	1.2	Added PDF conversion feature. Added information on List section
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1 Introduction:

The purpose of this Training document is to provide guidelines to a section of users of the IDT Document Control Portal who have the privilege to edit/contribute to the content present in the portal. The portal has been developed using a "*Microsoft Office SharePoint 2010*".

2 Scope:

The scope of this document limits to describing the steps to be followed while editing the contents within different sections of the portal depending on the role of the logged in user. The following items are out of scope of this document:

- Any information about the design of the portal.
- Any information about the deployment methodologies followed.

3 Abbreviations and Acronyms:

ID	Acronym	Description
1	UI	User Interface
2	IDT	Integrated Device Technology
3	WF	Work Flow
4	SharePoint	SharePoint Server 2010
5	DCP	Document Control Portal

4 Document Control Portal Setup

4.1 Site Structure

Here is the diagram representing the site Hierarchy for IDT portal. The Product Line folder will be visible\accessible to only those Users who belong to the corresponding Business Unit SharePoint User Group. For ex. "**AUI**" folder will be visible\accessible to users who belong to "APD" SharePoint User Group only.

The SharePoint security groups and security for the Product Lines folders is configured by the SharePoint administrator. The logged in users will only view/edit the folders & document(s) to which they have access to.



Figure 1: Site & Folder Structure

4.2 Folder Structure

The following folder structure will be created in the following Document Libraries of "Document Control Portal (DCP)" site:

4.2.1 Products Document Library:

4.2.1.1 Marketing Content Type:



Figure 2: Folder Structure in Products Document Library

Name	Туре	Level/Parent	Basis for Folder name and its Location
Product Line	folder	Root	Under each BU there are multiple Product Lines. A separate sub-folder will be present for each product line under each unique BU.
Project	Sub-Folder	Product Line	Each Product Line will have multiple Projects. For each unique Project name a new sub-folder will be present.
1_Generic Docs	Sub-Folder	Product Line	Each Product Line will have one " 1_Generic Docs " folder. All the documents with multiple " Generic ID " value will be uploaded into this folder.
Part No.	Sub-Folder	Project	A project can contain many Part numbers. For every unique part number a new folder will be present under the same Project.
MKG and APPS	Sub-Folder	Part No.	 Files with the following values for "Document Type" column will be present into this folder Application Note / Technical Paper Block Diagram / Schematic (system block diagram) Datasheet Manual / User Guide. Model
Software	Sub-Folder	Part No.	 Files with the following values for "Document Type" column will be present into this folder Software Tool

The table specifies the basis for creation of the folder hierarchy:

Folders mentioned above would always be present, but would be visible to different users based on their permission and the security group to which they belong. Here is the table specifying the "*Product Lines*" and different "*Security Groups*" associated with those Product lines. The users belonging to those security groups will only have those folders visible for them.

Product Line	Security Group
ACS	APD, All Product Lines
АРС	APD, All Product Lines
PCS	APD, All Product Lines
РРС	APD, All Product Lines
AUI	APD, All Product Lines
SES	CBU, All Product Lines
TCS	CMD, All Product Lines
ТРС	CMD, All Product Lines
SPO	COM, All Product Lines

FCM	COM, All Product Lines
NET	COM, All Product Lines
RFD	COM, All Product Lines
SFC	COM, All Product Lines
MIP	ECD, All Product Lines
SIP	ECD, All Product Lines
SSP	ECD, All Product Lines
VID	VDO, All Product Lines

4.2.1.2 Change Notification Content Type:



The table specifies the basis for creation of the folder hierarchy:

Name	Туре	Level/Parent	Basis for Folder name and its Location
PCN_PDN_Errata	folder	Root	At the root level, of products document Library, for PCN, PDN
			and Errata documents, we will have this folder
PCN	Sub-	PCN_PDN_Errata	PCN_PDN_Errata folder, will in turn contains PCN folder inside
	Folder		it. All the documents of "Document Type" PCN will be
			uploaded into this folder.
PDN	Sub-	PCN_PDN_Errata	PCN_PDN_Errata folder, will in turn contains PDN folder
	Folder		inside it. All the documents of "Document Type" PDN will be
			uploaded into this folder.
Errata	Sub-	PCN_PDN_Errata	PCN_PDN_Errata folder, will in turn contains Errata folder
	Folder		inside it. All the documents of "Document Type" Errata will be
			uploaded into this folder.

4.2.2 Corporate Document Library:



The table specifies the basis for creation of the folder hierarchy:

Name	Туре	Level/Parent	Basis for Folder name and its Location
Marketing	Folder	Root	At the root level, of Corporate document Library, we will have this folder
Advertising	Sub- Folder	Marketing	Marketing folder will in turn contain Advertising folder inside it. All the documents of " <i>Document Type</i> " Advertising will be uploaded into this folder.
Articles	Sub- Folder	Marketing	Marketing folder will in turn contain Articles folder inside it. All the documents of " <i>Document Type</i> " Articles will be uploaded into this folder.

Corporate_Images	Sub- Folder	Marketing	Marketing folder will in turn contain Image folder inside it. All the documents of <i>"Document Type"</i> Image will be uploaded into this folder.
Events	Sub- Folder	Marketing	Marketing folder will in turn contain Events folder inside it. All the documents of " <i>Document Type</i> " Events will be uploaded into this folder.
Presentation	Sub- Folder	Marketing	Marketing folder will in turn contain Presentation folder inside it. All the documents of " <i>Document Type</i> " Presentation will be uploaded into this folder.
Press Releases	Sub- Folder	Marketing	Marketing folder will in turn contain Press Releases folder inside it. All the documents of <i>"Document Type"</i> Press Releases will be uploaded into this folder.
Product Briefs	Sub- Folder	Marketing	Marketing folder will in turn contain Product Brief folder inside it. All the documents of " <i>Document Type</i> " Product Brief will be uploaded into this folder.
Product Overviews	Sub- Folder	Marketing	Marketing folder will in turn contain Product Brief folder inside it. All the documents of " <i>Document Type</i> " Product Overview will be uploaded into this folder.
Stationery	Sub- Folder	Marketing	Marketing folder will in turn contain Stationery folder inside it. All the documents of " <i>Document Type</i> " Stationery will be uploaded into this folder.
Videos	Sub- Folder	Marketing	Marketing folder will in turn contain Videos folder inside it. All the documents of " <i>Document Type</i> " Videos will be uploaded into this folder.
White Paper	Sub- Folder	Marketing	Marketing folder will in turn contain White Paper folder inside it. All the documents of " <i>Document Type</i> " White Paper will be uploaded into this folder.
Legal	Folder	Root	At the root level, of Corporate document Library, we will have this folder
Corporate Governance	Sub- Folder	Legal	Legal Folder will in turn contain Corporate Governance Folder
Board of Director	Sub- Folder	Corporate Governance	Corporate Governance Folder will in turn contain Board of Director Folder
Committee Charters	Sub- Folder	Corporate Governance	Corporate Governance Folder will in turn contain Committee Charters Folder
Governance Docs	Sub- Folder	Corporate Governance	Corporate Governance Folder will in turn contain Governance Docs Folder

Folders mentioned above would always be present, but would be visible to different users based on their permission and the security group to which they belong. Here is the table specifying the "*Folder Names*" and different "*Security Groups*" associated with those Folders. The users belonging to those security groups will only have those folders visible for them.

Folders	Security Group
Advertising	CorpMkg_Write, CorpMkg_Read
Articles	CorpMkg_Write, CorpMkg_Read
Events	CorpMkg_Write, CorpMkg_Read
Guides	CorpMkg_Write, CorpMkg_Read, Regional_MarCOM
Image	CorpMkg_Write, CorpMkg_Read
Overview	CorpMkg_Write, CorpMkg_Read, Regional_MarCOM
Presentation	CorpMkg_Write, CorpMkg_Read
Press Releases	CorpMkg_Write, CorpMkg_Read
Product Brief	CorpMkg_Write, CorpMkg_Read, Regional_MarCOM
Stationery	CorpMkg_Write, CorpMkg_Read
Videos	CorpMkg_Write, CorpMkg_Read, Regional_MarCOM
White Paper	CorpMkg_Write, CorpMkg_Read

4.2.3 Packages Document Library:



The table specifies the basis for creation of the folder hierarchy:

Name	Туре	Level/Parent	Basis for Folder name and its Location
Career and Package Types	Folder	Root	At the root level, of Packages Document Library, we will have this folder
Certificates and	Folder	Root	At the root level, of Packages Document Library, we will

Reports			have this folder
Material Composition Declarations	Folder	Root	At the root level, of Packages Document Library, we will have this folder
PCN_PDN	Folder	Root	At the root level, of Packages Document Library, we will have this folder
Reflow Profiles	Folder	Root	At the root level, of Packages Document Library, we will have this folder

Folders mentioned above would always be present, but would be visible to different users based on their permission and the security group to which they belong. Here is the table specifying the "*Folder Names*" and different "*Security Groups*" associated with those Folders. The users belonging to those security groups will only have those folders visible for them.

Folders	Security Group
Career and Package Types	Package_Write_CPT, Package_Read_CPT
Certificates and Reports	Package_Write_CertReports, Package_Read_CertReports
Material Composition Declarations	Package_Write_MCD, Package_Read_MDC
PCN_PDN	Package_Write_PCN, Package_Read_PCN
Reflow Profiles	Package_Write_Reflow, Package_Read_Reflow

4.2.4 ISO Document Library

- 1 Burn-In
- 2 Document Control
- 3 Design Rules
- 4 Design Control Specifications
- 5 Environmental
- 6 IDT Forms
- 7 FSS Facility
- 8 Laser Sort
- 9 Manufacturing-Assembly
- 10 Material Procurement
- 11 Quartz Specs
- 12 MSS Material
- 13 Production Control
- 14 PDAEs

- 15 Product-Marketing
- 16 Quality
- 17 Quartzware Drawing
- 18 SAP Safety
- 19 Std Operating Procedures
- 20 Statistical Process Control
- 21 Shipping-Receiving
- 22 Specs
- 23 Cert Tests
- 24 Test Programs
- 25 Test Specifications
- 26 Wafer Fab Specs
- 27 Run cards

The table specifies the basis for creation of the folder hierarchy:

Name	Туре	Level/Parent	Basis for Folder name and its Location
Burn-In	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Document Control	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Design Rules	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Design Control Specifications	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Environmental	Folder	Root	At the root level, of ISO Document Library, we will have this folder
IDT Forms	Folder	Root	At the root level, of ISO Document Library, we will have this folder
FSS Facility	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Laser Sort	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Manufacturing- Assembly	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Material Procurement	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Quartz Specs	Folder	Root	At the root level, of ISO Document Library, we will have this folder

MSS Material	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Production Control	Folder	Root	At the root level, of ISO Document Library, we will have this folder
PDAEs	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Product-Marketing	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Quality	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Quartzware Drawing	Folder	Root	At the root level, of ISO Document Library, we will have this folder
SAP Safety	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Std Operating Procedures	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Statistical Process Control	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Shipping-Receiving	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Specs	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Cert Tests	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Test Programs	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Test Specifications	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Wafer Fab Specs	Folder	Root	At the root level, of ISO Document Library, we will have this folder
Run cards	Folder	Root	At the root level, of ISO Document Library, we will have this folder

Folders mentioned above would always be present, but would be visible to different users based on their permission and the security group to which they belong. Here is the table specifying the "*Folder Names*" and different "*Security Groups*" associated with those Folders. The users belonging to those security groups will only have those folders visible for them.

Folders	Security Group
Burn-In	Burn-In_Readers, Burn-In_Members, Burn-In_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Document Control	Document-Control_Readers, Document-Control_Members, Document-Control_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Design Rules	Design-Rules_Readers, Design-Rules_Members, Design- Rules_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Design Control Specifications	Design-Control-Specifications_Readers, Design-Control- Specifications_Members, Design-Control- Specifications_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Environmental	Environmental_Readers, Environmental_Members, Environmental_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
IDT Forms	IDT-Forms_Readers, IDT-Forms_Members, IDT- Forms_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
FSS Facility	FSS-Facility_Readers, FSS-Facility_Members, FSS- Facility_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Laser Sort	Laser-Sort_Readers, Laser-Sort_Members, Laser- Sort_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Manufacturing-Assembly	Manufacturing-Assembly_Readers, Manufacturing- Assembly_Members, Manufacturing-Assembly_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Material Procurement	Material-Procurement_Readers, Material- Procurement_Members, Material-Procurement_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Quartz Specs	Quartz-Spec_Readers, Quartz-Spec_Members, Quartz- Spec_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
MSS Material	MSS-Material_Readers, MSS-Material_Members, MSS- Material_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Production Control	Production-Control_Readers, Production- Control_Members, Production-Control_Owners, ISO DC

	Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO
PDAFs	PDAE Readers PDAE Members PDAE Owners ISO DC
	Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO
	Supervisor, ISO Test Program, ISO Training Notification
Product-Marketing	Product-Marketing_Readers, Product-Marketing_Members,
	Product-Marketing_Owners, ISO DC Contact, ISO Dynamic
	Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test
	Program, ISO Training Notification
Quality	DC Contact ISO Dynamic Reviewer ISO OA Reviewer
	ISO Supervisor ISO Test Program ISO Training
	Notification
Quartzware Drawing	Quartzware-Drawing_Readers, Quartzware-
	Drawing_Members, Quartzware-Drawing_Owners, ISO DC
	Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO
	Supervisor, ISO Test Program, ISO Training Notification
SAP Safety	SAP-Safety_Readers, SAP-Safety_Members, SAP-
	ISO OA Reviewer, ISO Supervisor, ISO Test Program, ISO
	Training Notification
Std Operating Procedures	Std-Operating-Procedures Readers, Std-Operating-
	Procedures_Members, Std-Operating-Procedures_Owners,
	ISO DC Contact, ISO Dynamic Reviewer, ISO QA
	Reviewer, ISO Supervisor, ISO Test Program, ISO Training
	Notification
Statistical Process Control	Control Members Statistical-Process-Control Owners
	ISO DC Contact, ISO Dynamic Reviewer, ISO QA
	Reviewer, ISO Supervisor, ISO Test Program, ISO Training
	Notification
Shipping-Receiving	Shipping-Receiving_Readers, Shipping-
	Receiving_Members, Shipping-Receiving_Owners, ISO DC
	Supervisor ISO Test Program ISO Training Notification
Specs	Spec Readers Spec Members Spec Owners ISO DC
Specs	Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO
	Supervisor, ISO Test Program, ISO Training Notification
Cert Tests	Test-Specifications_Readers, Test-
	Specifications_Members, Test-Specifications_Owners, ISO
	DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer,
	Notification
Test Programs	Test-Programs Readers Test-Programs Members Test-
	Programs Owners, ISO DC Contact, ISO Dynamic
	Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test
	Program, ISO Training Notification
Test Specifications	Cert-Tests_Readers, Cert-Tests_Members, Cert-
	Lests_Owners, ISO DC Contact, ISO Dynamic Reviewer,
	Training Notification
Wafer Fab Specs	Wafer-Fab-Spec Readers. Wafer-Fab-Spec Members
	Wafer-Fab-Spec_Owners, ISO DC Contact, ISO Dynamic
	Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test
	Program, ISO Training Notification

Run cards	Run-Cards_Readers=, Run-Cards_Members, Run- Cards_Owners, ISO DC Contact, ISO Dynamic Reviewer,
	ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification

4.2.5 NPI Document Library:

1_Document Template
ACS
APC
AUI
CMD
FCM
MIP
NET
PCS
PPC
RFD
SES
SFC
SIP
SPO
SSP
TCS
TPC
VID

The table specifies the basis for creation of the folder hierarchy:

Name	Туре	Level/Parent	Basis for Folder name and its Location
1_Document	Folder	Root	At the root level, of NPI Document Library, we will have
Template			this folder
	Folder	Root	At the root level, of NPI Document Library, we will have
ACS			this folder
	Folder	Root	At the root level, of NPI Document Library, we will have this folder
APC			
A111	Folder	Root	At the root level, of NPI Document Library, we will have this folder
AUI			
	Folder	Root	At the root level, of NPI Document Library, we will have this folder
CMD			

FCM	Folder	Root	At the root level, of NPI Document Library, we will have this folder
MIP	Folder	Root	At the root level, of NPI Document Library, we will have this folder
NET	Folder	Root	At the root level, of NPI Document Library, we will have this folder
PCS	Folder	Root	At the root level, of NPI Document Library, we will have this folder
PPC	Folder	Root	At the root level, of NPI Document Library, we will have this folder
RFD	Folder	Root	At the root level, of NPI Document Library, we will have this folder
SES	Folder	Root	At the root level, of NPI Document Library, we will have this folder
SEC	Folder	Root	At the root level, of NPI Document Library, we will have this folder
SIP	Folder	Root	At the root level, of NPI Document Library, we will have this folder
SPO	Folder	Root	At the root level, of NPI Document Library, we will have this folder
SSP	Folder	Root	At the root level, of NPI Document Library, we will have this folder
TCS	Folder	Root	At the root level, of NPI Document Library, we will have this folder
трс	Folder	Root	At the root level, of NPI Document Library, we will have this folder
VID	Folder	Root	At the root level, of NPI Document Library, we will have this folder

Folders mentioned above would always be present, but would be visible to different users based on their permission and the security group to which they belong. Here is the table specifying the "*Folder Names*" and different "*Security Groups*" associated with those Folders. The users belonging to those security groups will only have those folders visible for them.

Folders	Security Group
1_Document Template	NPI DocTemplate Read, NPI DocTemplate Write
ACS	NPI_APD

APC	NPI_APD
	NPI_APD
	NPI_APD
AUI	
ТРС	NPI_APD
TCS	NPI_APD
SES	NPI_CBU
CMD	NPI_APD
SPO	NPI_COM
FCM	NPI_COM
NET	NPI_COM
RFD	NPI_COM
SFC	NPI_COM
MIP	NPI_ECD
SIP	NPI_ECD
SSP	NPI_ECD
VID	NPI_VDO

5 Working with Documents using SharePoint 2010

5.1 Filename Nomenclature:

5.1.1 Products Document Library:

Products library has two content types associated with it

- a) **Marketing Content Type**: This content type should be used for the marketing documents.
- b) **Change Notification Content Type**: This content type should be used for PCN, PDN & Errata documents.

Users have to select the correct content type so that the document will be saved with correct nomenclature. Selecting a wrong content type will affect the filename nomenclature. The content type selection drop down is displayed on the "Edit Properties" window while uploading the document manually.

The document was upload file will not be accessible	ded successfully and is checked out to you. Check that the fields below are correct and that all required fields are fill to other users until you check in.
Content Type	
Nama *	Marketing ContentType

Name field is non – editable in the properties page and fill all the mandatory fields and click on save file should be saved

Edit				
Check Cancel	Paste & Cut	Delete Item		
Commit	Clipboard	Actions		
IDT > Products: Issue list Reviewed				
The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.				
Content Type		Marketing ContentType		
Name *		Issue list Reviewed		
Title				
Business Unit *		NONE 💌		
Product Line		NONE 💌		
Revision Date *		6/1/2012		
Generic ID		^	1	

5.1.1.1 Marketing Content Type

Document filename, for any document uploaded to DCP, and using Marketing Content Type, will follow the below mentioned nomenclature: <*First Part>_<Abbreviation for the Document type>_<Date in yyyymmdd format>_<Abbreviation for Language>*.

Nomenclature is dependent on following:

- **First Part** : If Identifier is present as a part of Document metadata then First part is Identifier else it will be Generic ID
- Abbreviation for Document Type.
- Date in "*yyyy-mm-dd*" format.
- Abbreviation for Language

Note: If English is selected as language, then (_<Abbreviation for Language>) will be replaced with empty string.

For e.g. for a document with following metadata, the file name will be "*IdentityTsi721_APN_20110818*":

- *"IdentityTsi721"* is identifier/Generic ID (if identifier is not a part of document metadata)
- Document Type is "*APN*" (Application Note)
- Created date is of format YYYYMMDD ("20110818")
- Language is "English"

Whereas for a document with following metadata, the file name will be "*IdentityTsi721_APN_20110818_Ko*":

- Identifier is "IdentityTsi721"
- Document Type is "APN" (Application Note)
- Created date is of format YYYYMMDD ("20110818")
- Language is "Korean"

Document filename, for any document uploaded to DCP, and using Marketing Content Type, will follow the below mentioned nomenclature: <*First Part>_<Abbreviation for the Document type>_<Date in yyyymmdd format>_<Abbreviation for Language>*.

Nomenclature is dependent on following:

- **First Part** : If Identifier is present as a part of Document metadata then First part is Identifier else it will be Generic ID
- Abbreviation for Document Type.
- Date in "*yyyy-mm-dd*" format.
- Abbreviation for Language

The table below lists out the Document Types and the associated abbreviations to be used for nomenclature.

Document Type	Abbreviations to be used
Application Note	APN
Block Diagram	BDG
Datasheet	DST
Datasheet Change Notice	DCN
Flyer	FLY
Manual	MAN
Manual - Eval Board	MAE

Manual - Reference Board	MAR
Manual – Software	MAS
Manual - User Reference	MAU
Misc	MSC
Model – BSDL	МОВ
Model – HSPICE	МОН
Model – IBIS	MOI
Model – Verilog	MOG
Model – VHDL	MOV

5.1.1.2 Change Notification Content type

Document filename, for any document uploaded to DCP, and using Marketing Content Type, will follow the below mentioned nomenclature: <*ldentifier>_<Abbreviation for the Document type>_<Date in yyyymmdd format>_<Abbreviation for Language>*.Nomenclature is dependent on following:

- Identifier of the document
- Abbreviation for Document Type.
- Date in "*yyyy-mm-dd*" format.
- Abbreviation for Language

Note: For all the documents, with English as the language (_<Abbreviation for Language>) will not be there

For e.g. for a document with following metadata, the file name will be "*IdentityTsi721_ERA_20110818*":

- Part no. is "*IdentityTsi721*"
- Document Type is "ERA" (Errata)
- Created date is of format YYYYMMDD ("20110818")
- Language is "English"

Whereas for a document with following metadata, the file name will be "*IdentityTsi721_APN_20110818_Zh*":

- Identifier is "IdentityTsi721"
- Document Type is "APN" (Application Note)
- Created date is of format YYYYMMDD ("20110818")
- Language is "Chinese"

The table below lists out the Document Types and the associated abbreviations to be used for nomenclature.

Document Type	Abbreviations to be used
Datasheet Errata	DSE
Device Errata	DER
Errata	ERA
Product Change Notice	PCN
Product Delete Notice	PDN

Validations:

In Generic ID field no special characters are allowed except hyphen, comma, period and space.

In Identifier field no special characters are allowed except hyphen.

5.1.2 Corporate Document Library

Document filename, for any document uploaded to DCP Corporate Document Library, will follow the below mentioned nomenclature: *<Identifier>_<Abbreviation for the Document type>_<Date in yyyymmdd format>_<Abbreviation for Language type>*. Nomenclature is dependent on following:

- Identifier of the document
- Abbreviation for Document Type.
- Date in "*yyyy-mm-dd*" format.

For e.g. for a document with following metadata, the file name will be "*IdentityTsi721_OVR_20110818*":

- Identifier is "IdentityTsi721"
- Document Type is "OVR" (Overview)
- Created date is of format YYYYMMDD ("20110818")

The table below lists out the Document Types and the associated abbreviations to be used for nomenclature.

Document Type	Abbreviations to be used
Advertising	ADV
Articles	ATC
Events \ Tradeshow	EVT
Guide	GDE
Image files	IMG
Overview	OVR
Presentations	РРТ
Press Release	PRE
Product Brief	PRB
Stationery System	STA

Videos	VID
White Paper	WHP

Validations:

In Generic ID field no special characters are allowed except hyphen, comma, period and space.

In Identifier field no special characters are allowed except hyphen.

5.1.3 Package Document Library

Document filename, for any document uploaded to DCP Package Document Library, will follow the below mentioned nomenclature: <*ldentifier>_<Abbreviation for the Document type>_<Date in yyyymmdd format>_<Abbreviation for Language type>*. Nomenclature is dependent on following:

- Identifier of the document
- Abbreviation for Document Type.
- Date in "*yyyy-mm-dd*" format.

For e.g. for a document with following metadata, the file name will be "*IdentityTsi721_OVR_20110818*":

1.1. Identifier is "IdentityTsi721"

1.2. Document Type is "OVR" (Overview)

1.3. Created date is of format YYYYMMDD ("20110818")

The table below lists out the Document Types and the associated abbreviations to be used for nomenclature.

Document Type	Abbreviations to be used
Carrier / Package Type	СРТ
Certificates / Reports	CRD
Materials Composition Declaration	MCD
Product Change Notification	PCN
Product Discontinued Notification	PDN
Reflow Profile	RPR

Validations:

In Package ID field no special characters are allowed except hyphen, comma and space.

In Identifier field no special characters are allowed except hyphen.

5.1.4 NPI Document Library

Document filename, for any document uploaded to DCP, and using NPI Document Content Type, will follow the below mentioned nomenclature, based on the type of Generic ID it has:

The following nomenclature will be applied to the manually uploaded documents

<Unique ID>_<Abbreviation for the Document type>_<Date in yyyymmdd format>

- UniqueID of the document will be Unique Identifier in case Project Name may or may not contain data.
 - Or

UniqueID of the document will be Project Name in case Unique Identifier is Empty

- Abbreviation for Document Type.
- Date in "*yyyy-mm-dd*" format.

For e.g. for a document with following metadata, the file name will be "*Tsi721_APN_20110818*":

Unique Identifier is "*Tsi721*" in case Project Name may or may not contain any value
 Or

Project Name is "Tsi721" in case Unique Identifier is Empty

- Document Type is "APN" (Application Note)
- Created date is of format YYYYMMDD ("20110818")

The table below lists out the Document Types and the associated abbreviations to be used for nomenclature.

Document Type	Abbreviations to be used
Market Requirements Document	MRD
Product Requirements Document	PRD
Design Requirements Specification	DRS
Functional Specification Document	FSD
Return on Investment	ROI
Gate Review Presentation	GRP
Plans (General)	PLN
Project Risk Assessment	PRA
Tape Out Checklist	тос
Test Results	TRE
Reports	REP
New Product Announcement	NPA
New Product Launch	NPL
Miscellaneous	MSC

Validations:

In Project Name field no special characters are allowed except hyphen.

In Unique Identifier field no special characters are allowed except hyphen.

5.1.5 ISO Document Library

Document filename for any document uploaded to DCP ISO Document Library, will follow the below mentioned nomenclature:

Nomenclature is dependent on following:

- i. Document Type Acronym
- ii. 4 or more alphanumeric characters string.

For e.g. for a document with following metadata, the file name may be "*BIJ-1233*" or "*BIJ-AAA*" or "*BIJ-12AA*" etc

ISO - test.t	xt		□ ×					
Edit								
Check Cancel	Paste	y Delete Item						
Commit	Clipboard	Actions						
DCP Dev ► IS	O: test		<u>^</u>					
The docume all required	ent was uploaded su fields are filled out.	ccessfully and is checked out to you. Check that the fields below ar The file will not be accessible to other users until you check in.	e correct and that					
 Items on the with proper 	is list require conter rights. More inform	it approval. Your submission will not appear in public views until app ation on content approval.	roved by someone ≡					
Content Type	2	ISO Form Content Type for ISO Form						
Name *		txt						
Title								
ISO Product Li	ne	SFC 💌						
ISO Document	: Туре	Burn-In						
Document Typ	e Acronym	BIJ						
Spec Number	*	ISONomenclature						
Change Mess	age from webpag	je 📃	×					
IDCN								
Reason 1	Nomencla	ture rules have renamed the file as: 'BU-ISONomenclature'.						
Reference	Reference Do you wish to proceed ?							
Sections			-					
		OK Cancel	Mode: On					

• Document Type Acronym is "BIJ"

The table below lists out the Document Types and the document type acronyms to be used for nomenclature.

Document Type	Document Type Acronym
BIJ	Burn-In
DCA	Document Control
DCC	Document Control
DCH	Document Control
DCP	Document Control
DCQ	Document Control
DCN	Document Control
DRC	Design Rules
DRJ	Design Rules
DRP	Design Rules
DRS	Design Rules
DRQ	Design Rules
DSN	Design Control Specifications
ENA	Environmental
ENC	Environmental
ENS	Environmental
ENJ	Environmental
ENQ	Environmental
ENP	Environmental
FRA	IDT Forms
FRC	IDT Forms
FRG	IDT Forms
FRH	IDT Forms
FRJ	IDT Forms
FRP	IDT Forms
FRS	IDT Forms
FRN	IDT Forms
FSA	Facility
FSC	Facility
FSJ	Facility
FSP	Facility
LSA	Laser Sort

LSJ	Laser Sort
LSS	Laser Sort
MAA	Manufacturing/Assembly
MAC	Manufacturing/Assembly
MAG	Manufacturing/Assembly
MAJ	Manufacturing/Assembly
MAP	Manufacturing/Assembly
MAS	Manufacturing/Assembly
MAQ	Manufacturing/Assembly
MPA	Material Procurement
MPC	Material Procurement
MPG	Material Procurement
МРН	Material Procurement
MPJ	Material Procurement
MPP	Material Procurement
MPS	Material Procurement
MQJ	Quartz Spec's
MSA	Material
MSC	Material
MSH	Material
MSJ	Material
MSP	Material
PDA	PDAE's
РСА	Production Control
PCG	Production Control

РСН	Production Control
PCJ	Production Control
PCS	Production Control
PSA	Product/Marketing
PSC	Product/Marketing
PSJ	Product/Marketing
PSP	Product/Marketing
PSS	Product/Marketing
QCC	Quality
QCG	Quality
QCH	Quality
QCJ	Quality
QCP	Quality
QCS	Quality
QCN	Quality
QCA	Quality
QPN	Quartzware Dwg
SAA	Safety
SAJ	Safety
SAS	Safety
SAC	Safety
SAF	Safety
SOA	Std. Operating Proced's
SOC	Std. Operating Proced's
SOH	Std. Operating Proced's
SOJ	Std. Operating Proced's
SOP	Std. Operating Proced's
SOS	Std. Operating Proced's
SON	Std. Operating Proced's

SPA	Statistical Process Control
SPC	Statistical Process Control
SPH	Statistical Process Control
SPJ	Statistical Process Control
SPP	Statistical Process Control
SPS	Statistical Process Control
SRS	Shipping/Receiving
TOS	Test Specifications
TSA	Test Specifications
TSC	Test Specifications
TSG	Test Specifications
TSJ	Test Specifications
TSP	Test Specifications
TSS	Test Specifications
TSQ	Test Specifications
TSN	Test Specifications
TCJ	Test/Wafer Cert. Test's
WFA	Wafer Fab Spec's
WFC	Wafer Fab Spec's
WFH	Wafer Fab Spec's
WFJ	Wafer Fab Spec's
WFS	Wafer Fab Spec's

WFQ	Wafer Fab Spec's
WHO	Runcards
VOJ	Runcards
WOS	Runcards
WOQ	Runcards
ICS	ICS
STG	STG Spec's
TPG	Test Prog's

Validations:

In Name field no special characters are allowed except hyphen.

<u>Note</u>: Document Type Acronym and Document type are linked. For each document type there will be certain number of Document type acronyms. The user has to select the document type acronym and enter the value in spec number field to generate the filename.

5.1.6 ISO Content Types

ISO document library has multiple content types associated with it. While uploading the document into the ISO library, user can choose the correct content type from the drop down list on the "Edit Properties" Window. Selecting the <u>correct content type</u> will associate the <u>correct metadata fields</u> to the document being uploaded.

Content Type	ISO Spec 💌	
	ISO Form Spec	
Spec Number *	ISO Spec ISO Drawing	
Name *	ISO Test Program ISO SCD ISO PDAE	.txt

Content Type Drop Down on the Edit Properties Window

5.2 How to upload a document to a Document Library?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need upload the documents.
- Now click on "*Add new item*" link, present on the middle-right area of the site (shown in fig.)

iite Actions 👻 🖄 Brow	rse Docum	brary Tools ents Library									
New Upload Document + Document + F	New Publish folder IDT.co	to Delete from	Edit Document	Check Out Check In Discard Check Out	View Properties Properties	Ver	sion History cument Permissions lete Document	E-mail a Link Share 8	Alert Me -	Download a Copy	Send To - Manage Copies
Libraries	V Type	Name		Business I	Unit DCPApprova	IWF	Document Type			Generic I	ID Product Line
Products		Tsi721_AN	_20110818	COM			Application Note/	Technica	l Paper	0001	ACS
Lists Tasks	🕈 Add nev	vitem									

Figure 3: Products Document Library

• Click on "*Browse*" Button, as shown in fig:

Upload Document		□ ×
DCP Home Products : Uplo	ad Document	
Upload Document Browse to the document you intend to upload.	Name: Browse Add as a new version to existing files	
Destination Folder Specify the folder in this document library where the document should be saved.	Folder: /AUI/1_Generic Docs/ Choose Folder	
Version Comments Type comments describing what has changed in this version.	Version Comments:	4
	OK	Cancel

Figure 4: Document Upload screen
• A new window will appear, navigate to the path, from where we need to upload the document, select the document (this will enter the document name in the file name text box) and press "*Open*" Button.

Organize New folder				•
 ★ Favorites ▲ Desktop ▲ Downloads ▲ Recent Places ▲ Libraries ▲ Documents ▲ Music ▲ Pictures ▲ Videos 	17 bytes Test2.txt Text Document 17 bytes Test3.txt Text Document 17 bytes Test4.txt Text Document 17 bytes Test5.txt Text Document 17 bytes			
Computer Local Disk (C:) Local Disk (D:)	Tsi721_AN_20110818.txt Text Document 13 bytes			
File name:	Tsi721_AN_20110818.txt	 All Files (*.*)		-
		 Open	Cancel	

Figure 5: Selecting a document to upload

• Full document path will now appear in the upload document section. Now, Click on "*OK*" button to continue uploading the document.

Upload Document Browse to the document you intend to upload.	Name: C:\Users\vineet\Desktop\Tsi721_ Upload Multiple Files Voverwrite existing files	AN_2011 Browse
	ОК	Cancel

Figure 6: Document upload screen with selected document.

• Now enter the correct values and click "*Save*" button to save the data.

Content Type	Marketing ContentType
lame *	ST905 .pdf
itle	5T905 Test Title
Business Unit *	APD V
Product Line	APC 💌
Revision Date	8/11/2011
Document Type *	Application Note
Generic ID	TSI721
dentifier	
hort Description	×
Product Tree	AC97
anguage	English

Figure 7: Document edit properties screen

Field Name	Data Type	Purpose	Required/Optional
Name	Single Line of Text	Used for string the Name of the	Required
		Document.	
Title	Single Line of Text	Used for storing the title to be	Optional
		displayed to the users.	
Business Unit	Choice Column	Used for storing the associated	Required
		Business Unit of the document.	
Product Line	Choice Column	Used for storing the associated Sub	Optional
		Business Unit of the document.	
Revision Date	Date	Used for string the date of revision	Optional
		of the document, after it is	
		published.	
Generic ID	Single Line of Text	Used for storing the document ID.	Optional
Document Type	Choice Column	Used for storing the associated	Required
		Document Type of the document.	
Short	Multiple Line of Text	Used for writing the description for	Optional
Description		the document.	

• Once the user clicks on "Save" button a pop up message is displayed with the new filename. This pop up message is displayed to confirm the filename before applying it to the document. If the users feels that filename is correct he/she can click on "OK". To correct the filename click on "cancel" and the user is returned to the "edit properties" window.

Message from webpage	×
Nomenclature rules have renamed the Do you wish to proceed ?	file as: 'TSI721_APN_20110811'.
	OK Cancel

• Once the user clicks on OK, a confirmation message will be displayed.

Message fr	rom webpage
	File 'TSI721_APN_20110811' is saved successfully.
	ОК

• A new record would be added to the Document Library, as shown in the following screenshot.

Actions 👻 📩 Browse	Docum	ients Libr	ary					Reddy, Cha	ndrashekar 🝷
	5	,					Ø	DT. Integrate	d Device Technology
Document Control Po	rtal						Search	this site	GO
CP Home Products	P	ackages	Corporate						0
P Home 🕨 Products 🕨 1_G	eneric	Docs + All	Documents -						
2 1_Generic Docs		🔄 Туре	Name	Identifier	Identifier	Language	Business Unit	Language	Generic ID Multi
D DS60xx			IDT- LDS6100_FLY_20091218	IDT- LDS6100		English	APD		
P 📑 FCM			LDS6200- Touch_FLY_20100517	LDS6200- Touch		English	APD		
	н		LDS700x- FamilyOV_FLY_20110126	LDS700x- FamilyOV		English	APD		
PCS	Ч	1	LDSxxxx- Touch_MI_20110121	LDSxxxx- Touch		English	APD		
PPC			TSI721_APN_20110811	TSI721		English	APD		

Figure 8: Products Document Library with uploaded document

• As we can see, based on "*Business Unit*", "*Product Line*" and the document name, it should be saved into the corresponding folder.

• **NOTE:** While entering the values, the fields marked in red * are mandatory and cannot be left blank.

5.3 How to overwrite an existing document?

5.3.1 How to overwrite a document using the "replace document" option?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need upload the documents.
- Navigate to the document which needs to be replaced
- Click on the arrow next to the document name to open the menu.

E	BIJ-1122	Ŧ	

Figure 9 Down arrow next to filename

• Click on "Replace Document" option



Figure 10 Edit Control Block - drop down menu

• In order to replace a document, the document must be checked-out to you. If it is not, system will prompt you to check-out the document.



Figure 11 System Prompting with a message to check out the document before replacing

- Click OK to check-out the document. If you click "cancel" the replace operation will be cancelled.
- System will then display the "replace document" window which will allow you to select the new document that will replace the current document in the library.

Replace Document		
FileName:	BIJ-1122.txt	
Replace File:		Browse
Update revision date au	tomatically 🔽	
	Submit Cancel	
	Subhilt	



- Click on **Browse** button to open the select document window
- Select the document to be uploaded and click on Open button



Figure 13- Select document window

 Select file path will now be displayed in the "Replace File" field on the "replace document" window

Replace Document

FileName:	BIJ-1122.txt
Replace File:	E:\chandra\WinWire Projects\IDT\Test1D_OVR_
Update revision date au	tomatically 🔽
	Submit Cancel

🗆 ×

• The check box "Update revision date automatically" will be selected by default. This will ensure that the "revision date" for the document is updated as soon as the file is replaced. If you do not want the system to update the revision date please uncheck the check box "update revision date automatically".

Replace Document		□ ×
FileName:	BIJ-1122.txt	
Replace File:	E:\chandra\WinWire Projects\IDT\Test1D_OVR_	e)
Update revision date auto	matically 🔽	
	Submit Cancel	
۱ <u>ــــــــــــــــــــــــــــــــــــ</u>		

- Click on **Submit** button to complete the replace operation.
- As soon as the document is replaced successfully, system will display a success message.
- Click exit to close the window and start the "Auto Check-in" feature.
- If you remember, before replacing the document system has prompted you to check-out the file so that no-body will make the changes to the document while you are working on it. So after replacing the document with another file, we now need to check in the document so that it is available for other users.
- To know more about the "Auto Check-in" feature please go to **section 5.8.2** and section **5.12.2** will show to manually check-in the document.
- If you select a type of file which is different than the one trying to be replaced, you will get an error message as shown in the below screenshot. You cannot replace a Word Document with PDF file, Word document with an excel file, etc.

Replace Document		□ ×
FileName:	BIJ-1122.txt	
Replace File:	Browse	
Update revision date automatically		
	Submit Cancel	
The file being uploaded is of different file ty	pe than the file being replaced in the library. The file being uploaded should b	e .txt

Figure 14 Replace file error

• If the document is checked out by another user you cannot replace it. System will display the following error message, when you attempt to replace the document checked-out by another user.

Replace Document	□ ×
You cannot replace this document while checked out or locke another user.	ed for editing by

5.3.2 How to overwrite a document using the "Add new item" option?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need upload the documents.
- Now click on "*Add new item*" link, present on the middle-right area of the site (shown in fig.)

Site Actions - 20 Brow New Upload Document - Document - F	New Publis New IDT.c	nents	e from	Edit	Check Check Check	k Out k In ird Check Out	View Propertie	Edit Properties	Ver	rsion History cument Permissions lete Document	E-mail a Link	Alert Me •	Download a Copy	Send To +
N	ew			Ope	en & Cheo	tk Out		1	lanage		Share 8	Track		Copies
Libraries	🔽 Туре	Name				Business	Unit D	CPApprova	IWF	Document Type			Generic I	D Product Line
Products		Tsi72	1_AN_20	0110818	S HEW	COM				Application Note	(Technical	l Paper	0001	ACS
Lists Tasks	🗣 Add ne	w item	3											

Figure 15: Products Document Library

• Click on "*Browse*" Button, as shown in fig:

Upload Document		□ ×
DCP Home Products : Uplo	ad Document	
Upload Document Browse to the document you intend to upload.	Name: Browse Add as a new version to existing files	
Destination Folder Specify the folder in this document library where the document should be saved.	Folder: /AUI/1_Generic Docs/ Choose Folder	
Version Comments Type comments describing what has changed in this version.	Version Comments:	4
	OK	Cancel

Figure 16: Document Upload screen

• A new window will appear, navigate to the path, from where we need to upload the document, select the document (this will enter the document name in the file name text box) and press "*Open*" Button. Here the filename of the document which is yet to be uploaded should be the same as the file in the library which need to be overridden.

	der		EB	
 Favorites Desktop Downloads Recent Places Libraries Documents Music Pictures Videos 	17 bytes Test2.txt Text Document 17 bytes Test3.txt Text Document 17 bytes Test4.txt Text Document 17 bytes Test5.txt Text Document 17 bytes			
Computer Local Disk (C:) Local Disk (D:)	Tsi721_AN_20110818.txt Text Document 13 bytes			
File	name: Tsi721_AN_20110818.txt	es (*.*) Open	Cancel	•

Figure 17: Selecting a document to upload

• Full document path will now appear in the upload document section. Now, Click on "*OK*" button to continue uploading the document.

Upload Document Browse to the document you intend to upload.	Name: C:\Users\wineet\Desktop\Tsi721_ Upload Multiple Files Voverwrite existing files	AN_2011 Browse
	ОК	Cancel

Figure 18: Document upload screen with selected document.

• Now enter the correct values and click "*Save*" button to save the data.

Content Type	Marketing ContentType
lame *	5T905 .pdf
itle	5T905 Test Title
Business Unit *	APD 💌
Product Line	APC 💌
Revision Date	8/11/2011
Document Type *	Application Note
Generic ID	TSI721
dentifier	
Short Description	
Product Tree	AC97
anguage	English 💌

Figure 19: Document edit properties screen

Name	Single Line of Text	Used for string the Name of the Document.	Required
Title	Single Line of Text	Used for storing the title to be displayed to the users.	Optional
Business Unit	Choice Column	Used for storing the associated Business Unit of the document.	Required
Product Line	Choice Column	Used for storing the associated Sub Business Unit of the document.	Optional
Revision Date	Date	Used for string the date of revision of the document, after it is published.	Optional

Generic ID	Single Line of Text	Used for storing the document ID.	Optional
Document Type	Choice Column	Used for storing the associated Document Type of the document.	Required
Short Description	Multiple Line of Text	Used for writing the description for the document.	Optional

• Once the user clicks on "Save" button a pop up message is displayed with the new filename. This pop up message is displayed to confirm the filename before applying it to the document. If the users feels that filename is correct he/she can click on "OK". To correct the filename click on "cancel" and the user is returned to the "edit properties" window.

Message from webpage	×
Nomenclature rules have renamed the f Do you wish to proceed ?	file as: 'TSI721_APN_20110811'.
	OK Cancel

• Once the user clicks on OK, a confirmation message will be displayed.



• A new record would be added to the Document Library, as shown in the following screenshot.

Actions 👻 📩 Browse	Library Documents	Libra	ary					Reddy, Cha	ndrashekar 🕇
	ň						ØI	DT. Integrate	d Device Technology
Document Control Po	rtal						Search	this site	GO
CP Home Products	Packa	iges	Corporate						0
P Home 🕨 Products 🕨 1_G	eneric Docs	s ► All	Documents -						
2 1_Generic Docs	• 🖻	Туре	Name	Identifier	Identifier	Language	Business Unit	Language	Generic ID Multi
D DS60xx		Z	IDT- LDS6100_FLY_20091218	IDT- LDS6100		English	APD		
P 📮 FCM			LDS6200- Touch_FLY_20100517	LDS6200- Touch		English	APD		
	H		LDS700x- FamilyOV_FLY_20110126	LDS700x- FamilyOV		English	APD		
PCN_PON_Errata		Z	LDSxxxx- Touch_MI_20110121	LDSxxxx- Touch		English	APD		
P 🛅 PPC		N	TSI721_APN_20110811	TSI721		English	APD		

Figure 20: Products Document Library with uploaded document

• As we can see, based on "*Business Unit*", "*Product Line*" and the document name, it should be saved into the corresponding folder.

• **NOTE:** While entering the values, the fields marked in red * are mandatory and cannot be left blank.

Note: Applicable for document libraries with version history disabled (not enabled).

5.4 How to Upload Multiple Documents to Document Library?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need upload the documents.
- Now from the ribbon tab, click "*Upload Document*" icon and then "*Upload Multiple Documents*" to upload multiple Documents (as shown in fig.).

New Document • Upload Doc Upload a dor	Publish to Delete from ument cument from your	Edit Document	View Edit Properties Properties X Manage	i E-mail a Link i Alert Me ↓ Share & Track	Download a Copy Copies	Workflows
Libraries Products Lists	tiple Documents ple documents from er to this library.	PD Business Unit DCPApproval	WF Document Type	Generic ID	Modified By	Business Unit
Tasks	Add new item					

• On click of "Upload Multiple Documents" a new window would appear as shown in below fig.

• From the left panel (highlighted below in red), we can select the path where we have the documents to be uploaded.

• From the right panel (highlighted below in red), we can select the files to be uploaded (by checking on the check box present before every file).

Now, click on "OK" button

to upload the documents (highlighted below in red).

•

ify the folder in this document library where the	ne document should be saved.					
			/APD Business	Unit/	oose Folder	
Desktop	Name	Size	Modifie 🔺			
🗄 🚛 Computer	R rightArrow New.png	1 KB	8/30/2			
E S vineet	Script for Changing Group property.bt	1 KB	6/28/2			
🗈 🤯 Libraries	Site Action bt	9 KB	7/14/2			
Network	Test1.txt	1 KB	7/25/2			
Functions	Test2.txt	1 KB	7/25/2			
IDT. sharepoint2010.DeploymentFiles	Test3.txt	1 KB	7/25/2			
NewPrice Projects Funct 2	Test4.txt	1 KB	7/25/2			
TeamViewer 5.0.9703	Tankfat	1.00	7/05/0			
E-3 realivered 3.0.0703	Tsi721_AN_20110818.bd	1 KB	8/25/2			
	Tsi722_AN_20110818.bd	1 KB	8/25/2			
	Tsi723_AN_20110818.bd		8/25/2			
	1 Magat Jak	1 40	6/29/2			
	Vineet.png	435 KB	8/17/2 -			
	* [m		•			
	North March 1997					
				04		6 - 1
				OK		Cancel

- Now user would be prompted for saving the document (shown in below fig.).
- Click on "OK" button to save the documents (shown in below fig.).



• Now all the documents would be uploaded (in checked-out mode) as shown in below fig.

• Note: More on "Check-In/Check-Out" is covered later in section 6.9.

List Insta	ince				
Туре	Name	DCPApprovalWF	Document Type	Generic ID	Modified By
1 11.	Tsi721_AN_20110818				System Account
	Tsi722_AN_20110818 ≣ NEW				System Account
N	Tsi723_AN_20110818				System Account

• Please check-in all the documents and add all the mandatory fields by taking the reference of section 6.9.2.

5.5 How to insert values into a List?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the List name, present on left hand side of the site (also called left navigation bar), where we need to add an item.
- Now click on "*Add new item*" (highlighted below in red).

IDTDevelopment	Home bsearch ese	arch	This List: LanguageTyp	
Libraries	ID ID	DisplayName		Code
Products	1	English		En
Corporate	2	Chinese		Zh
Lists	3	Korean		Ко
Tasks				
BusinessUnit	Add new item	1		
DocType	a Add new item			

- A new window would appear prompting user for entering the data (as shown below).
- **NOTE**: Field appearing on the form may differ from list to list based on list fields.
- Enter the data and click on "*Save*" button to save the data (shown in below fig.).

LanguageTyp	pe - New Item				□ ×
Save Cancel	Paste & Cut Paste Copy	Attach File Actions	ABC Spelling Spelling		
DisplayName *		Japan	ese		
		Ja	Code	Save	Cancel

• A new record would be added as shown in below fig.

IDTDevelopment > LanguageType > All Items -								
IDTDevelopment	Home bsear	ch esearch	This List: LanguageTyp					
Libraries	ID	DisplayName		Code				
Products	1	English		En				
Corporate	2	Chinese		Zh				
Lists	3	Korean		Ko				
Tasks	4	Japanese		Ja				
BusinessUnit	Add as	w item						
DocType	- Add he	witem						
LanguageType								

5.6 How to Create Folders in a List\Document Library?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to create a folder.
 - Click on Documents tab present on top of ribbon as shown in the fig.
 - Click on "*New Folder*" icon to create a folder (Highlighted below in red).

New Document 🚽 Upload Document New Folder	Ø Make Avai ↓ Ø Make Unav	able to IDT.	com IDT.com	Edit Document	View Properties Properties X	E-mail a Link ⊈ Alert Me ↓	Copie
	New			Open & Check Out	Manage	Share & Track	
Home Products Anare a product doc	All Documents *	am by addin	g it to this	s document library.			
Home > Products > Share a product doc	All Documents *	am by addin	g it to this Type	s document library. Name		Title	
Home > Products > Share a product doc Libraries Products	All Documents ~	am by addin ID 5488	g it to this Type	s document library. Name ACS		Title	
Home > Products > Share a product doc Libraries Products	All Documents +	am by addin ID 5488 5511	g it to this Type in Type	s document library. Name ACS APC		Title	

- A new window will open as shown in below fig., prompting user to enter the name of the folder.
- Enter the name for the folder and click on save button.

New Folder		□ ×
Edit		
Save Cancel	Paste	
Commit	Clipboard	
Home 🕨 Produ	cts : New Folder	
Name *	FCM	
		Save
_		

• A new folder would be created with the above specified name.

5.7 How to View Properties of an uploaded Document?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to view the Document properties.
- Now select the checkbox, present just before every item (shown in fig.), corresponds to the item for which we want to view the properties.
- Now from the ribbon tab, click "*View Properties*" icon to see the property of the Document (as shown in fig.).

Site Actions - Browse Do Site Actions - Browse Do New Upload New Put Document - Folder ID New	Library Tools cuments Library	Document Discard C Open & Check Of	ut heck Out ut	Edit Properties X De Manage	rsion History cument Permissions lete Document	E-mail a Alert Link Me + Share & Track	Download a Copy	Send To ↓ The Manage Copies Copies Copies
Libraries	🕅 Туре	Name	Business Unit	DCPApprovalWF	Document Type	Generic ID	Product Line	Modified
Products	V	Test Title 📴 MEW	COM		Application Note/Technical Paper	0001	APC	8/25/2011 12:04 AM
Lists	(H)	Tsi721_AN_20110818	COM		Application Note/Technical Paper	0002	APC	8/25/2011 12:03 AM
Tasks	Add new	item						

• A new screen would appear displaying the property of the item.

• From this window, we can edit and delete item as well (as shown in the fig., from ribbon control).

• Click on Close button to exit to the main screen.

Edit Item	Workflows Check Out				
Manage	Actions				
Document ID	US2Z7HJQHK5U-3-17				
Business Unit	COM				
Product Line	APC				
Revision Date	8/11/2011				
Generic ID	0001				
Document Type	Application Note/Technical Paper				
Short Description	Test Description				
NexPrise_Reference_ID	2				
Is Public					
Start Publish Date					
Stop Publish Date					
Product Tree					
Content Type: Marketing ContentT Created at 8/24/2011 11:45 PM by Last modified at 8/25/2011 12:04 A	ype System Account Clos M by System Account	æ			

• **Note:** Properties of 2 documents cannot be seen by selecting 2 check boxes and clicking on "*View Properties*".

5.8 How to edit properties of an uploaded document?

5.8.1 Auto Check-in feature disabled

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to edit the Document properties.
- Now select the checkbox, present just before every item (shown in fig.), corresponds to the item for which we want to view the properties.
- Now from the ribbon tab, click "*Edit Properties*" icon to edit the property of the Document (as shown in fig.).

New Upload Document - Document	New Publish to Delete from Folder IDT.com IDT.com	Edit Document B Discard Check Out	view View Propertie: Properties	Version History Document Permissions Delete Document ge	E-mail a Alert Link Me - Share & Track	Download a Copy Go To Source
Libraries	Type Name	Busines	ss Unit DCPApprovalWF	Document Type		Generic ID Product Line
Products	Tsi721_AN_	20110818				
	E ridd menn item					
Lists						

- A new screen would appear displaying the property of the item in edit mode.
- Edit the properties which we want to edit and then click on "*Save*" button(save button is present on the bottom of the form and also on the ribbon control, anyone could be used for saving the document)

Save Cancel Paste	Copy Delete Item	
Name *	111 .ascii	
Title	111.ASCII	
Business Unit *	VDO 💌	
Product Line	PCS -	
Revision Date	8/22/2011	
Generic ID	333	
Document Type *	Application Note/Technical Paper	-
Short Description	dfdsfdsfdfd	^
Created at 8/22/2011 4:27 A	1 by Rani Ghadge Save	Cancel

5.8.2 Auto Check-in feature enabled

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Products Document Library, present on the top.

Document Control Portal				Search this site	ology Tags & Notes
IDT Products Corpor	rate Packages	NPI I	50 ISO Tasks		0
IDT → Products → All Documents →					
 ▷ ¹/₂ Folders ▷ ²/₂ Business Unit ▷ ²/₂ Document Type 	ID Generic ID 1 8399	Multi Type	Name ACS	Is Public	Document ID Start Publ Y3DKPQAQS6MP -3-8399
 ▷ ④ Product Tree ▷ ④ Product Line 	8422 8520		APC AUI		Y3DKPQAQS6MP -3-8422 Y3DKPQAQS6MP
	17747		NO Nomenclature		-3-8520 Y3DKPQAQS6MP -3-17747
	8571		PCS		Y3DKPQAQS6MP -3-8571

• Now select any document which is published in products library open the ECBmenu and select the option Edit properties.

17721		CR43_MSC_2012042	23			Y3DKPQAQS6MP -3-17721	
17754		Doc Control Portal C	F 2	Replace Document		Y3DKPQAQS6MP -3-17754	
17547		eweq_ALL_2012032	*	View Properties	1	Y3DKPQAQS6MP -3-17547	
17758	e,	Issue list Reviewed	1) 1)	Edit Properties Edit Document		Y3DKPQAQS6MP -3-17758	
17649	211	mur test CR43_MOV	b	Check Out Publish a Major Version	Published	Y3DKPQAQS6MP -3-17649	5/28/2012 5:52 }
17759		performance 📓 🕊 W	0 \\	Publish to idt.com Version History		Y3DKPQAQS6MP -3-17759	
17732	111.	sdsa_MOH_2012052		Compliance Details		Y3DKPQAQS6MP -3-17732	
17757	111.	test 1234_BDG_201	3	Workflows Alert Me		Y3DKPQAQS6MP -3-17757	
17735	۲.	test pag1_BDG_201	\$ <u>8</u>	Send To		Y3DKPQAQS6MP -3-17735	
17689	E	test43 RDG 201204	\mathbf{x}	Delete		Y3DKPO4OS6MP	

• Now Edit and click on save.

Products -	mur test CR43	_MOV_20120528.txt	□ ×
Edit			
Save Cancel	Paste	Delete Item	
Commit	Clipboard	Actions	
			Ŧ
Document Typ)e *	Model - VHDL	
Short Descript	tion	4343	*
			-
Language *		English 💌	
Identifier			=
Product Tree			
DCPApprovalV	VF		
Version: 11.2 Created at 4/12/2	በ17 11•41 ΔM hv Murthv	Sav	e Cancel

• Now it should navigate to the check in page after clicking on save.



Now any option from above three options and click on ok and see that the file is checked in after that.

5.9 How to edit the Uploaded Document?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to edit the Document properties.
- Now select the checkbox, present just before every item (shown in fig.), corresponds to document which we want to edit.
- Now from the ribbon tab, click "*Check Out*" icon to Check out the Document (as shown in fig.).

• Now, again from the ribbon tab, click "*Edit Document*" icon to edit the Document (as shown in fig.).

Site Actions 👻 🛃 Browse	Library Tools Documents Library								
New Upload New Document - Document - New New	Publish to Delete from IDT.com IDT.com	Edit Document Docard Ch Open & Check Out	view Propert	Edit ies Properties X De Manage	rsion History cument Permissions lete Document	E-mail a Alert Link Me - Share & Track	Download a Copy	Send To - Manage Copies Go To Source Copies	Vorkf
Libraries	🕅 Туре	Name	Business Unit	DCPApprovalWF	Document Type	Generic ID	Product Line	Modified	
Products	V e 1	Test Title Ontw	СОМ		Application Note/Technical Paper	0001	APC	8/25/2011 12:04 A	AM
Lists	Ð	Tsi721_AN_20110818	COM		Application Note/Technical Paper	0002	APC	8/25/2011 12:03 A	AM .
Tasks	🗣 Add new	item							

• On click of "*Edit Document*" icon, it'll prompt with a warning message, as shown in fig. Click on "*OK*" button to continue.

?	Some files can harm your computer. If the file information looks suspicious or you do not fully trust the source, do not open the file.
	You are opening the following file:
	File name: Test1.txt From: 122.181.132.122:7000

• Now it'll open the uploaded document. Make the desired changes. Save the document and close it.

• Select the checkbox, present just before every item (shown in fig.), corresponds to the item for which we edited just now.

• Now from the ribbon tab, press "*Check In*" icon to Check in the edited document (as shown in fig.).

iite Actions 💌 🏻	Browse	Library Tools Documents Librar	y .							
New Document + Do	Jpload counent - Folder New	Publish to Delete fro IDT.com	m Edit Document 🗟 Discard O Open & Check O	Check Out	Edit ties Properties X De Manage	rsion History ocument Permissions Hete Document	E-mail a Alert Link Me + Share & Track	Download a Copy	Send To - Manage Copies Go To Source Copies	Work
Libraries		🕅 Туре	Name	Business Unit	DCPApprovalWF	Document Type	Generic ID	Product Line	Modified	_
Products		I	Test Title Ontw	COM		Application Note/Technical Paper	0001	APC	8/25/2011 12:04	АМ
Lists		Þ	Tsi721_AN_20110818	СОМ		Application Note/Technical Paper	0002	APC	8/25/2011 12:03	AM
Tasks		🗣 Add nei	v item							

• Now select the kind of version which we need for the updated document, update it with proper comments and click"*OK*" to check in and save the document.

Version Select the type of version you would like to check in.	What kind of version would you like to check in? 2.0 Major version (draft) 1.2 Overwrite the current minor version	
Retain Check Out Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.	Retain your check out after checking in? ⊛ Yes ◯ No	-
Type comments describing what has changed in this version.	Comments:	
	Салс	el

• Now our document is saved in the document library with proper version and comment attached to it.

• **Note**: More on Check-In/Check-Out of the document is covered in section 12-h. of this document.

5.10 How to download a copy of the document from SharePoint?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to download the Document.

• Click on the arrow button, present on the right side of the Name field, for the item for which we want to download the document.

- Now take the cursor to "Send To" option.
- A new popup will appear, select "*Download a Copy*" from there (shown in fig.).

Libraries	🔳 Ту	уре	Name	Bus	siness Unit	DCPApprovalWF	Document Type	Generic ID	Product Line
Products			Test Title 🛛 🕬	CO	м		Application Note/Technical Paper	0001	APC
Lists		5 10 10	View Properties Edit Properties Edit in Microsoft Word	-	Μ		Application Note/Technical Paper	0002	APC
Tasks	🕈 Ado	 	Check In Discard Check Out						
Products Aroduct Tree		٢	Compliance Details Workflows Alert Me						
			Send To		Other Locat	ion			
		& ×	Manage Permissions Delete	<u>a</u>	E-mail a Lin Create Doci	k ument Workspace			
					Download a	Сору			

- A new window will appear, prompting user to save the document.
- Click on "*Save*" to save the document.

o you	want to save this file?
and a	Name: New_Text_Document.txt
	Type: Text Document
	From: 122.181.132.122
	<u>Save</u> Cancel
?	While files from the Internet can be useful, some files can potential harm your computer. If you do not trust the source, do not save thi file. What's the risk?

• Screen would display a window, prompting user for the path to save the downloaded document.

- Click on "*Save*" button to save the document (shown in fig.).
- After downloading our document would be present in the selected path.

Desktop		 ✓ ✓ 	ktop	P
Organize 👻 New folder				0
🔶 Favorites 🕺 🦰	Libraries			-
Desktop	System Folder			=
💯 Recent Places 🗉	System Folder			
🗃 Libraries	Computer			
Documents	System Folder			
Pictures	Network			
Videos 🔍	System Folder			
🖳 Computer 📼 🚽	IDTCustomApprovalWF			,
File name: New_Text_D	ocument.txt			-
Save as type: Text Docume	ent			•
Hide Folders		Save	Cance	21

5.11 How to create a new document in a Document Library?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>)in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar).
- Under the Library Tools tab, in Ribbon control (as shown in fig.), Click on Documents tab
- Now click on "*New Document*" icon, present on the Ribbon control (as shown in the fig.), to create a new document.

Site Actions 👻	🖄 Brow	vse	Librar Document	y Tools s Library							
New Document - D	Upload Occument + F	New Folder lew	Publish to IDT.com	Delete from IDT.com	Edit Document Dopen & Check Out	View Edit Properties Properties	 Version History Document Permissions Delete Document Ianage 	E-mail a Link Share 8	Alert Me	Download a Copy	Send To + Manage Copies Go To Source Copies
Libraries Products		There	Type are no item	Name s to show in th	Business Unit	DCPApprovalWF ary. To add a new item, d	Document Type		Gener	ic ID	Product Line
Lists Tasks		4	dd new ite	em							

• User would be prompted with a warning message. Click on "OK" button to continue

• Note: This is a warming message generated by "SharePoint OpenDocuments Class ActiveX control (Filename: OWSSUPP.DLL). It is possible to turn off this warning message by disabling the "SharePoint OpenDocuments Class" add-on from Internet Explorer >> Manage Add on screen but this will also turn off the ability to interact with the SharePoint document library through Microsoft office applications such as MS Word, MS Excel, MS PowerPoint, etc.



• After this, user would be prompted to enter their credentials. Please enter the correct credentials and continue.

• A new document would be opened. Enter the desired text in the opened document and then enter the mandatory field press "*Ctrl* + *S*" to save the document, the same could be done from documents "*File* \rightarrow *Save*" option as well.

• A new window would appear where user would be prompted to save the document, as shown in below fig.

- Please check the document path on the address bar. It should be the same Document Library/List where we want to create the document (shown in fig.).
- Enter the Filename for the document.
- Click on "Save" button to save the document in the Document Library/List.

A http://122.181.132.120:2000	Lists + Products -	Search Products	٩
Microsoft Office W IDT Templates Produ	cts		
 ★ Favorites ■ Desktop B Downloads 3 Recent Places 			
 ☐ Libraries ☐ Documents J Music ☐ Pictures 			
File name: Test Document.docx			
Authors: vineet	Tags: Add a tag		•
Save Thumbnail			
Hide Folders	Too <u>l</u> s	Save	Cancel

• After this users would be prompted with the below warning messages. Click on buttons which are highlighted in red.

\bigcirc	Microsoft Of	fice has ident	ified a potentia	al security of	concern
Location:	http://122.1	81.132.120:20	00/Lists/Products,	/safdasfasdf	docx
Your sect from this access to	location. This is this location, y	ave blocked this s not a trusted l our computer n	document from a ocation. If you ch nay no longer be	occessing info loose to enal secure.	rmation ble

This above security warning occurs because the file attempts to command the office application (word, excel, etc.) to make a connection with the SharePoint server. With ever-increasing concerns about viruses, Trojan horses and worms getting into our computers, all software vendors by default lock down connections between machines but allow the users to decide which connections to allow and when to allow them. The above figure shows the Microsoft Word Security Notice dialogbox that appears when a user tries to connect word/excel/PowerPoint to SharePoint. You can disable this security warning by adding the site to the trusted sites zone. Please follow the below steps to add the site http://docs.idt.com to the trusted zone on your computer.

- In Internet Explorer version 7or 8, on the **Tools** menu, click **Internet Options**.
- On the Security tab, click trusted sites, and then click Sites.

- In the Add this Web site to the zone box, type or select the address of the Web site, and then click Add.
- If you want Internet Explorer to verify that the server for each Web site in this zone is secure before you connect to any Web sites in this zone, select the **Require server verification (https:)** for all sites in this zone check box.
- Click **OK** twice.

	You must check in this document to make it visible to other people.
	This document was automatically checked out to you because the serve
t Offline	e
	allow you to edit offline, this document will be stored on your mputer in:
	e allow you to edit offline, this document will be stored on your mputer in:
	e allow you to edit offline, this document will be stored on your mputer in: harePoint Drafts but can turn off offline editing or change the settings in:
	e allow you to edit offline, this document will be stored on your mputer in: harePoint Drafts bu can turn off offline editing or change the settings in: ffline Editing Options

- Based on user's system settings, few of the messages may not appear as well.
- Now, close the open document. While closing, user would be prompted with below message (shown in fig.).
- Click on "*No*" to continue.

	Other users c	apport can your	changes until you chu	ack in
(?)	Do you want t	to check in now?	changes unui you che	CK III.

• Now enter the desired comment and click on "*OK*" button to continue (as shown in the fig.).

heck In			ି ×
Version Comments			
This is test comment			
Keep the document checked o	ut after checkin	g in this version	
	0	ОК	Cancel
-			

• Our just created new document would appear in Document Library/List. As shown in the below figure.

• Now select the checkbox, present just before every item (shown in fig.), corresponds to the document which we have created just now (shown in the fig.).

• Now from the ribbon tab, click "*Edit Properties*" icon to edit the property of the Document (as shown in fig.).

Site Actions - 2 Br	New New	o Delete from IDT.com	Edit Document	Check Out	View Propertie: Properties	G Ver B Do X De nage	rsion History cument Permissions lete Document	E-mail a Link Share 8	Alert Me -	Download a Copy	Send To - Manage Copies Go To Source Copies
Libraries Products		Name Tsi721_AN_	20110818	Business L	Unit DCPApprova	alWF	Document Type			Generic I	ID Product Line
Lists Tasks											

• A new screen would appear displaying the property of the item in edit mode.

• Now enter the properties and click on "*Save*" button (save button is present on the bottom of the form and also on the ribbon control, either of them could be used for saving the document). Some of the fields are required and some are optional on this screen. Required/mandatory fields are marked with a red asterisk mark against them.

Save Cancel	Paste	Delete	
Commit	Clipboard	Actions	
Name *		111	ascii
Title		111.ASCII	
Business Unit	*	VDO 💌	
Product Line		PCS 💌	
Revision Date		8/22/2011	
Generic ID		333	
Document Typ	e *	Application Note/Technical Paper	
Short Descript	tion	dfdsfdsfdfd	^ _
			·

• The following Table given below explains the different fields and their significance in "*Products*" Document Library.

•

Field Name	Data Type	Purpose	Required/Optional
Name	Single Line of Text	Used for string the Name of the Document.	Required
Title	Single Line of Text	Used for storing the title to be displayed to the users.	Optional
Business Unit	Choice Column	Used for storing the associated Business Unit of the document.	Required
Product Line	Choice Column	Used for storing the associated Sub Business Unit of the document.	Optional
Revision Date	Date	Used for string the date of revision of the document, after it is published.	Optional
Generic ID	Single Line of Text	Used for storing the document ID.	Optional
Document Type	Choice Column	Used for storing the associated Document Type of the document.	Required
Short Description	Multiple Line of Text	Used for writing the description for the document.	Optional

• Again the checkbox, present just before every item (shown in fig.), corresponds to the newly created document.

• Now from the ribbon tab, press "*Check In*" icon to Check in the document (as shown in fig.).

	Library Tools					
Site Actions 👻 过	Browse Documents Library					
New Upload Document - Documer	J New Publish to Delete from t+ Folder IDT.com	Edit Document in Discard Check Out	View Edit Properties Properties X Delete Document	ns E-mail a Alert Link Me +	Download a Copy	Send To + Manage Copies Go To Source
	New	Open & Check Out	Manage	Share & Track	Cop	ies
Libraries	Type Name	Business L	Jnit DCPApprovalWF Document Ty	rpe	Generic ID	Product Line
Products	Tsi721_AN	_20110818 D HEW COM	Application N	ote/Technical Paper	0001	ACS
	Add new item					
Lists						

• Now select the kind of version which we need for the updated document, update it with proper comments and click "*OK*" to check in and save the document.

Check in		- ×
Version Select the type of version you would like to check in.	What kind of version would you like to check in? 1.3 Minor version (draft) 2.0 Major version (publish) 1.2 Overwrite the current minor version	
Retain Check Out Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.	Retain your check out after checking in? Yes O No	
Type comments describing what has changed in this version.	Comments:	•
	Cancel	

• Now our document is saved in the document library with proper version and comment attached to it.

• **Note**: More on Check-In/Check-Out of the document is covered in section 12-h. of this document.

5.12 Check-Out/Check-In:

When you check out a file from a library on a Microsoft Windows SharePoint Services site, it ensures that others cannot make changes to the file while we are editing it. While the file is checked out, we can edit the file, close it, reopen it, and even work with the file on our hard disk. Other users cannot change the file or see out changes until we check in the file.

Checking out files before working on them helps to avoid conflicts and confusion when multiple people are working on the same set of files. When a file is checked out to us, only we can make changes to it. We can check out any file on a SharePoint site for which we have permission, and we can check out files directly from the following 2007 Microsoft Office system programs: Word, Excel, PowerPoint, and Visio.

When we check in a file, we can type comments about the changes that we made to the file. This helps people to understand what has changed in the file from version to version. This is especially helpful if several people work on a file or if the file is likely to go through several revisions. If our library tracks versions of files, our comments become a part of the version history of the file, which can be helpful if people need to view or restore a previous version.

5.12.1 How to Check-Out a Document:

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to check-Out a Document.
- Select the checkbox, present just before every item (shown in fig.), corresponds to the document which we want to check-out.
- Now from the ribbon tab, click "*Check Out*" icon to Check out the document (as shown in fig.) for editing.

New Upload New Publ	ish to Delete from Com IDT.com	Edit Document Discard Check Out	View Properties Properties X Delete Document	E-mail a Alert Link Me -	Download a Copy Go To Source
Libraries	🔲 Туре	Name	MMProduc	tTree	Business Unit
Products		APD Business Unit			APD
		CBU Business Unit			CBU
		ECD Business Unit			ECD
icte		Tsi721_AN_20110818	ev.		APD
Tasks	Add new i	tem			

- We would be prompted again for checking out the document, as shown below.
- Click on "*OK*" button to check out the document.



 Checking the box "Use my local drafts folder" SharePoint will download the file to the local drafts folder. If you want to save it to your local drafts folder, select the "Use my local drafts folder" check box. Otherwise, do not select the check box.Speed and portability are the advantages of saving the file to a local folder. Greater file protection is the advantage of working online. If you do not need to work offline, you might prefer to work online. To work online, do not check the box and click OK to open the file.

Note:If you select two or more files for checkout, you do not have the option to save them to a local drafts folder.

Now the document is checked out on our name and will have and will have a green colored arrow mark on right bottom corner, as shown in fig. below.

ite Actions 👻 🔛 Browse 🛛 Docum	ents Library			
New Upload Document - Document - Folder ID.co New	to Delete from m IDT.com	Check Out Edit Document Discard Check Out Open & Check Out	View Properties Properties X Delete Document Manage	E-mail a Alert Link Me - Share & Track
Libraries	🔲 Туре	Name	MMProduc	tTree
Products		APD Business Unit		
		CBU Business Unit		
	-	ECD Business Unit		
liete		Tsi721_AN_20110818	NEW	
	Add new i	tem		

5.12.2 How to Check-In a Document:

• Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.

- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to check-In any checked-out Document.
- Select the checkbox, present just before every item (shown in fig.), corresponds to the checked-out document which we want to check-in.
- Now from the ribbon tab, click "*Check In*" icon to Check-In the checked-out document (as shown in fig.).

site Actions 👻 📄 Browse 🛛 Doc	Library Tools uments Library			
New Upload New Publocument - Document - Folder IDT	ish to Delete from .com IDT.com	Edit Document Discard Check Out	View Properties Properties View Properties Properties View View View View View View View View	E-mail a Alert Link Me +
Libraries	🔲 Туре	Name	MMProduc	tTree
Products		APD Business Unit		
		CBU Business Unit		
		ECD Business Unit		
Liete		Tsi721_AN_20110818	NEW	
Tasks	🕈 Add new i	tem		

- After clicking on "*Check In*" icon, a new window would appear as shown below.
- The window will prompt user if he/she wants to retain the document checked-out on their name and check in the changes made by them till now, so that other users are able to see the changes (shown in below fig. in "*Retain Check Out*" section).
- There would be a section for entering the comments as well (shown in below fig. in "*Comments*" section)
- After selecting the appropriate Check Out option and entering comments, click "*OK*" button to check in the document (shown in below fig.).

Retain Check Out Other users will not see your		
changes until you check in. If you wish to continue editing, you can retain your check out after checking in.	Retain your check out after checking in?	
Comments Type comments describing what has changed in this version.	Comments:	*
	ОК	Cancel

• Now, we can see that the document is checked-in and green colored arrow mark on bottom right side of icon is disappeared now.

Lib Site Actions 👻 📸 Browse Docume	ents Library			
New Upload Document - Document - New New	to Delete from n IDT.com	Edit Document Discard Check Out	View Properties Properties X Delete Document Manage	E-mail a Alert Link Me • Share & Track
Libraries	🔲 Туре	Name	MMProd	ductTree
Products		APD Business Unit CBU Business Unit ECD Business Unit		
15.42	B	Tsi721_AN_20110818	NEW	
Tasks	Add new i	tem		

5.13 Recycle Bin

The Recycle Bin provides a safety net when deleting documents, list items, lists, folders and files. When a user deletes any of these items from a Web site, the items are placed in the Recycle Bin.


Users can click on the Recycle bin icon on the quick launch to view the deleted items. Users with contributor permissions will be able to restore the file to its original location.

e this pag o will be a	e to restore items t automatically empti	hat you have deleted from this s ed.	ite or to empty deleted iten	ns. Items that were deleted r	more than 30 day
Restor	Selection X	elete Selection			
. nestore					
Туре	Name	Original Location	Created By	Deleted↓	Size

Users can click on the Recycle bin icon on the quick launch to view the deleted items. Users with contributor permissions will.

To restore a file, the user can select the document by click on the check box against it and click on the "Restore Selection" option. The file/object will be restored to its original location from where it was deleted.

All the deleted files are retained for 30 days and then the file is automatically moved to "Site Collection Recycle Bin". Even, if the user deletes the file from the recycle bin the file is moved to Site Collection Recycle Bin. By default the all the deleted files in "Site Collection Recycle Bin" are maintained for 30 days. Only site owners or site collection administrators will be able to restore the files from "Site Collection Recycle Bin".

If a user tries to delete a document which is published to www.IDT.com site, Doc Control Portal will display the following error message.

6 Versioning in SharePoint:

There might be a time when we would need to restore files back to an older version if any inadvertent change happens. We also want a way to track changes for auditing purposes.

SharePoint allows us to enable (by default it's disabled) versioning on lists and libraries. Once enabled, SharePoint will maintain multiple versions of the document or list which gets incremented, on every change. There are three different versioning settings:

- **No versioning**: This is the default setting in which the current version overwrites the older version. There are no previous versions stored. This setting is not recommended especially if our document library contains critical or important documents.
- **Create major versions:** Also called simple versioning, in this setting the document versions will be numbered with whole numbers, called major versions, i.e. 1, 2, 3, 4 etc.
- **Create major and minor (or draft) versions:** In this setting document versions will be numbered with whole numbers (1, 2, 3, 4 etc.) as well as numbers with decimals (.1, .2, .3, .4 etc.). The whole number is called the major version (indicates final copy) and the numbers with a decimal are called minor versions (indicates work is still in progress). We use this setting if our document goes through several iterations/drafts/reviews (minor versions) and we want only the final copy (major version) to be published to a broader audience.

Please note for a list or list items, the only option available for versioning is creating major versions, no minor versions are created.

Once versioning is enabled SharePoint automatically and transparently creates the next version of the document whenever a user updates a document in the library. These are some of the different scenarios when SharePoint will create a new version for document or list item:

- When a new document or list item is created or uploaded into SharePoint, version 1 is created if the option "*Create major versions*" is enabled or version 0.1 is created when "*Create major and minor (or draft) versions*" is enabled (not applicable for list items) and when you publish it then next higher major version is created.
- When we upload a document with the same name as an already existing document in the library and check the "*Add as a new version*" to existing files check box, the existing file becomes an older version and the new uploaded document will have next higher version number.
- When any property (metadata fields) of the document or list item is changed.
- When we Check-in a document that was previously Checked-out.
- When we open a document in the associated application, edit and save it for the first time. On subsequent changes no new versions will be created as long as we don't close the application and re-open it.
- When we restore the old version of the document.

6.1 Versioning Flowchart:



6.2 How to set the versioning in SharePoint?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to Set the Versioning (Products Document Library, in this case).
- From the ribbon control, Under "*Library Tools*" select "*Library*" tab (shown in below fig.).
- From ribbon control, under "*Settings*" section, click on "*Library Settings*" icon (shown in below fig.

		Library To	ols				Syste	m Account -
Standard View	Rowse De	Create View	Library Current View: Folder View Current Page	🚔 E-mail a Link ☞ Alert Me 🗸 🔊 RSS Feed	Sync to SharePoint Conr Workspace Coff	ect to	Form Web Parts - Edit Library	Library Settings
View Format	Datasheet	M	lanage Views	Share & Track	Connect & Expor	t	Customize Library	Bettings
L ibraries Products		IDT > Prod	nce	DCDA	INE Desiment Turns	Canadia		Rusias
Lists Tasks		Eg	Tsi721_AN_20110818	DCPApprova	Application Note/Technical	Generic	System Acco	ount APD

- On click of "*Library Settings*" icon, a new settings page would appear as shown in below fig.
- Click on "Versioning Settings" under "General Settings" section (shown in below fig.).

General Settings	Permissions and Management	Communications
Title, description and navigation Versioning settings Advanced settings	Delete this document library Save document library as template Permissions for this document library	RSS settings
Validation settings Column default value settings	Manage files which have no checked in version	
Manage item scheduling Rating settings	Workflow Settings Generate file plan report Enterprise Metadata and Keywords	
Audience targeting settings Metadata navigation settings	Settings Information management policy	
Form settings	settings	

• After "*Versioning settings*" is clicked, a new window would appear as shown in below fig.

- In "*Document Version History*" section, we can select the type of version we need for our document library (highlighted below in red).
- Click on "*OK*" button to enable the versioning (shown in below fig.).

Document Version History	Create a version each time you edit a file in this
Specify whether a version is created each time you edit a file in this document library. Learn about	document library?
versions.	No versioning
	Create major versions
	Example: 1, 2, 3, 4
	Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0
	Optionally limit the number of versions to retain Keep the following number of major versions:
	Keep drafts for the following number of major versions:
Draft Item Security	
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.	Who should see draft items in this document library?
	Any user who can read items
	Only users who can edit items
	 Only users who can approve items (and the author of the item)
Require Check Out	
Specify whether users must check out documents before making changes in this document library.	Require documents to be checked out before
Learn about requiring check out.	they can be edited? Yes No
	OK Const
	UK Cancel

7 Workflows:

Microsoft SharePoint Server 2010 includes a set of approval workflows that you can use to manage business processes in any organization. These workflows make business processes more efficient by managing and tracking the human tasks involved with a process and then providing a record of that process when it completes. This approval workflow can be used to manage the document creation, expense reporting, employee vacations, and more. The detailed analysis on workflow is out of scope for this document. Please refer below link to know more about workflows:

- <u>http://office.microsoft.com/en-us/sharepoint-designer-help/understand-approval-</u>
- workflows-in-sharepoint-2010-HA101857172.aspx
- <u>http://technet.microsoft.com/en-us/library/ee428308.aspx</u>

7.1 How to Approve/Reject/Reassign a document?

Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.

Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where our workflow is attached and documents needs to be Approved/Rejected (Products Document Library, in this case)

Only those documents which are in "*In Progress*" State can be Approved or Rejected.

Click on the Workflow status link (Shown in fig below). DCPApprovalWF is the workflow instance name for the document library; it displays the present workflow status for the document.

	t s ▸ Marketing ▸ A	ll Documents -					
Home							
Libraries	🕅 Туре	Name	Business Unit	DCPApprovalWF	Document Type	Generic ID	Product Line
Products		Test Title Intw	COM	In Progress	Application Note/Technical Paper	0001	APC
		Tsi721_AN_20110818	COM	In Progress	Application Note/Technical Paper	0002	APC
lists	🖶 Add new	/ item					
Tasks							

A new window would appear, as shown in below fig., and click on "*Please Approve <document name>*", highlighted in red in below fig.

Tasks					
The following tasks have been a	ssigned to the participants in thi	s workflow. Click a task to edit i	t. You can also view these tasks in the list Tasks.		
Assigned To	Title		Due Date	Status	Related Content
Vineet Singh	Please approve New Te	ext Document 🕮 🕬		Not Started	New Text Document
Workflow History					
View workflow reports The following events have occur	red in this workflow.				
Date Occurred	Event Type	User ID	Description		
8/9/2011 12:08 AM	Error	System Account	The e-mail message cannot be sent. Make	sure the e-mail has a	a valid recipient.
8/9/2011 12:08 AM	Error	System Account	The e-mail message cannot be sent. Make	sure the e-mail has a	a valid recipient.
	Workflow Initiated	Vineet Singh	Approval Workflow Task (en-US) Copy wa	s started. Participants	: Vineet Singh
8/9/2011 12:08 AM					

After click on the above mentioned link, again a new window would appear, where we will have the option of "*Approving*", "*Rejecting*", "*Reassigning*" and writing the comments (shown in below fig.).

This workflow task applies to t	New Text Document.
Status	Not Started
Requested By	Vineet Singh ;
Consolidated Comments	Approval Workflow Task (en-US) Copy started by Vineet Singh on 8/9/2011 12:08 AM Comment:
	These are the comments of the requestor and all previous participants.
Due Date	
Comments	
E	This message will be included in your response.

Fill the appropriate comment and "Approve/Reject/Reassign" based on requirement.

In case of Approval/Rejection of document, the appropriate status would be updated on list (Approve in this case), as shown in below fig.

Libraries	🔲 Туре	Name	Business Unit	DCPApprovalWF	Document Type	Generic ID	Product Line
Products	•	Test Title D Ntw	COM	Approved	Application Note/Technical Paper	0001	APC
	(III)	Tsi721_AN_20110818 ≅ н€w	COM	In Progress	Application Note/Technical Paper	0002	APC
Lists	🕈 Add nev	v item					
Tasks							

7.2 What to do when a document is rejected?

- A document once rejected could be again approved, for this click on click on the arrow button, present on the right side of the Name field, for the document for which we need to set the approval as workflow.
- A new popup will appear, select "*Workflows*" from the option.

Lii Site Actions + 😭 Browse Docum	orary Tools ents Lib	rary								
New Document - Document - Folder New	to Delete	from	Edit Document Discard Check Out	k Out	View Properties	Edit Properties	 Version Histo Document Pe Delete Docur Ianage 	rmissions nent	E-mail a Link Share 8	Alert Dov Me - Dov
Libraries	🕅 Тур	e	Name	Bus	siness Unit	Docume	ent Type	Generic I	D Pr	oduct Line
Products			Test Title R NEW	co	м	Applicat Note/Te	ion chnical Paper	0001	AP	°C
	Þ		View Properties Edit Properties	co	М	Applicat Note/Te	ion chnical Paper	0002	AP	°C
Lists	Add r	1	Edit in Microsoft Word							
Tasks			Check Out							
			Compliance Details							
		Ì	Workflows	1						
Products			Alert Me							

- On click of "*Workflows*" a new window would appear showing the workflow name on the top (shown in below fig.).
- Click on the workflow name to continue.

approval task, or request ch	arges to the document.	ราฐาา นาร
Workflows		
Select a workflow for more details on the	current status or history. Show my workflows only.	
Name	Started	Ended

• A new window would appear as shown in the below fig., displaying the workflow settings.

- Click on "*Start*" button to restart the workflow.
- Now the workflow would be in "*In Progress*" state. Use the previous steps in this section to approve the workflow.

Approvers	Assign To)	Order		
	Approvers ;	8,/ 11	One at a time (serial)		
	Add a new stage Enter the names of the people to order in which those tasks are a add stages to assign tasks to mo	whom the workflow wil assigned. Separate them ore people in different o	II assign tasks, and choose the with semicolons. You can also rders.		
Expand Groups	For each group entered, assi	ign a task to every meml	ber of that group.		
Request					
	This message will be sent to the	people assigned tasks.			
Due Dat <mark>e for All Ta</mark> sks					
	The date by which all tasks are o	due.			
Duration Per Task					
	The amount of time until a task	is due. Choose the units	by using the Duration Units.		
Duration Units	Day(s)				
	Define the units of time used by	the Duration Per Task.			
cc			8,/00		
	Notify these people when the wo	orkflow starts and ends	without assigning tasks to them.		
pCustomColumn					
art					

- If "*Reassign Task*" button is clicked, at the first place, a new window would appear (as shown in fig below)
- Enter the name of the person, to whom task has to be reassigned, fill the other values, relevant to us and then click on "*Send*" button to reassign the task.
- In case the document is reassigned to someone, the status will not change. It would still be in "*In Progress*" state.

This workflow task applies	to Test1.
Reassign Task To	Vineet Singh ;
New Request	
	This message will be included with your request.
New Duration	The amount of time until the task is due. To keep the existing due date, leave this field blank. To remove the due date, type the number '0'. Choose the units by using the New Duration Units.
New Duration Units	Day(s)
_	Define the units of time used by the New Duration.

8 Start Workflows Manually

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to start the workflow.
- Click on the ECB Menu of the document on which workflow need to be started as shown below.

			×	Delete	Copyright © 20	11 Integrated Device Technology, Inc
	- Add docum	ient	en.	Manage Permissions		
All Site Content		JJJJJ-KKKK_NPA		Alert Me	11/30/2011 1:42 AM	
🔊 Recycle Bin		ijiji-kkkk NDA	Ś	Workflows	11/30/2011 1:42 AM	Karun Kumar
		VID		Compliance Details	11/30/2011 3:38 AM	Karun Kumar
Tets		TPC		Discard Check Out	11/30/2011 3:36 AM	Karun Kumar Karun Kumar
MakeAvaliableConligList		SSP	Da	Check In	11/30/2011 3:38 AM	Karun Kumar
Make Available Configliet		SPO	E	Edit Document	11/30/2011 3:37 AM	Karun Kumar
DroductLino		SIP	1	Edit Properties	11/30/2011 3:38 AM	Karun Kumar
LanguageType		SFC	-	View Properties	11/30/2011 3:37 AM	Karun Kumar
DocType		SES	-	Maura Danamanta	11/30/2011 3:36 AM	Karun Kumar
RusinessUnit		RFD			11/30/2011 3:37 AM	Karun Kumar
Tasks		PPC			11/30/2011 3:36 AM	Karun Kumar
Lists		PCS			11/30/2011 3:35 AM	Karun Kumar
NPI		NET			11/30/2011 3:37 AM	Karun Kumar
Corporate		MIP			11/30/2011 3:38 AM	Karun Kumar
Packages		FCM			11/30/2011 3:37 AM	Karun Kumar
TestLib		CMD			11/30/2011 3:36 AM	Karun Kumar
Site Pages		AUI			11/30/2011 3:36 AM	Karun Kumar
Products		APC			11/30/2011 3:35 AM	Karun Kumar
		ACS			11/30/2011 3:35 AM	Karun Kumar

• Now click on the workflow associated with the document as shown below.

Start a New Workflow

NPI Approv Routes a d or reject th request ch	val WF locument for approval. Approvers ca he document, reassign the approval langes to the document.	an approve task, or		
Workflows				
Select a workflow for	r more details on the current status or histo	ory. Show my workflows only.		
Name	Started	Ended	Status	
Running Workfl	ows			
There are no curre	ently running workflows on this item.			
Completed Wor	kflows			

There are no completed workflows on this item.

• Enter the person name as shown below who will have to approve the request.

Approvers	Assign To	Order
	Karun Kumar ;	All at once (parallel)
	Add a new stage Enter the names of the people to whom th tasks, and choose the order in which those Separate them with semicolons. You can a tasks to more people in different orders.	e workflow will assign e tasks are assigned. Iso add stages to assign
Expand Groups	$\overline{\mathbf{V}}$ For each group entered, assign a task to every m	ember of that group.
Request		
	This message will be sent to the people as	signed tasks.
Due Date for All		
105K5	The date by which all tasks are due.	
Duration Per Task		
	The amount of time until a task is due. Cho the Duration Units.	oose the units by using
Duration Units	Day(s)	•
	Define the units of time used by the Durati	on Per Task.
СС	Notify these people when the workflow sta	k√ ₪ rts and ends without
	assigning tasks to them.	
Start	Cancel	

• Click 'Start' after filling the required information.

9 Starting ISO Approval Workflow

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the ISO Document Library, present on the top.
- Upload a document to any of the folders in the library.
- Name the file based on filename nomenclature.
- To Start ISO Approval WF Click on 'Publish a Major Version' on ECBMenu of the document for which the workflow has to be started.

IDT Products	Corporate All Documents	Packages	NPI	ISO ISO I	fasks		
ISO Folders Burp-In		Type Name BIJ-1111	III NEW		Modified 5/30/2012 3:10 PM	Modified By System Account	Effecti 5/30/2
 Environmental Environmental Murthy_latest test ISO Document T ISO Product Line 	ype ∢	BIJ-2222	22 III NEL G III III IIII IIII IIIII IIIII IIIII IIII	Replace Document Move Document View Properties Edit Properties Edit Document Check Out Publish a Major Ve	t 5/29/2012 2:38 PM	Rajiv Bhat	5/29/2
Key Filters Apply Content Type Modified On	Clear		୍ଦ୍ର ଓ ×	Version History Compliance Detail Workflows Alert Me Send To Manage Permissio Delete	ns		

• Fill the details in the initiation workflow as required and click 'Start'.

Workflow Initiation Fo	rm		×
			-
Supervisor	Vineet Singh ;	%/ 🗓	
Dynamic Approver *	Shiva Adluri ; Ple People Picker group.	Ser	
QA Approver *	Murthy ; Please ensure that the user belongs to QA Reviewer user gr	🍢 🛄 oup.	=
DC Contact *	Rajiv Bhat ; Please ensure that the user belongs to DC Contact user grou	🎝 🛄 up.	
Duration Per Task (Days) *	3		
Test Program Release Users *	Murthy ;	8 / 11	
Training Notification Users *	Murthy ;	8 / 🗓	Ŧ

• Since Supervisor field is optional, if user specifies Supervisor in initiation form task gets created to Supervisor otherwise task gets created to Dynamic Reviewers.

Supervisor Task Form		□ ×
	-	
Document :	BIJ-1111.txt View Documents in folder	
Requested by :	System Account	
Current Status :	Author Submit	
Hold : Please select 'Yes' if you want to put the task on hold.	No O Yes	
Comments : *		
		Â
		~
	Approve Reject Terminate Hold	Cancel

• If task is created for supervisor and if the reviewer approves, then workflow moves ahead and creates tasks to dynamic reviewers.

Dynamic Reviewer Ta	sk Form	□ ×
		*
Requested by :	System Account	
Current Status :	Supervisor Approved	
Hold : Please select 'Yes' if you want to put the task on hold.	No O Yes	
Additional Reviewers : Please select 'Yes' if you want to add additional reviewers. Existing reviewers will not be changed.	No O Yes	Е
Comments : *		*
		Ŧ
[Approve Reject Terminate Hold Add Reviewers C	ancel

• If all the dynamic reviewers approve then the workflow moves ahead and create task to QA Reviewer.

QA Reviewer Task Fo	rm	□ ×
Document :	BIJ-1111.txt View Documents in folder	Â
Requested by :	System Account	3
Current Status :	Dynamic Reviewer Approved	5
Hold : Please select 'Yes' if you want to put the task on hold.	No O Yes	2
Reassign Task : Please select 'Yes' if you want to reassign the task.	◉ No ⊘ Yes	5
Comments : *		*
	Approve Reject Reassign Terminate Hold C	ancel

• If QA Reviewer approves the workflow moves ahead and create task to DC Contact.

DC Contact Reviewer	Task Form		×
Document :	BIJ-1111.txt View Documents in folder		•
Requested by :	System Account		
Current Status :	QA Reviewer Approved		
Hold : Please select 'Yes' if you want to put the task on hold.	No O Yes		Ш
Reassign Task : Please select 'Yes' if you want to reassign the task.	No O Yes		
Comments : *		*	
	Approve Reject Reassign Terminate Hold Ca	ncel	

- If DC Contact approves workflow gets completed and starts two workflows named TestProgramWF and TrainingNotificationWF.
- If at any stage if any of the reviewers click on reject in the task form then workflow gets terminated.

Document :	BIJ-1111.txt View Documents in folder	^
Requested by :	System Account	
Current Status :	QA Reviewer Approved	
Hold : Please select 'Yes' if you want to put the task on hold.	◉ No ⊘ Yes	=
Reassign Task : Please select 'Yes' if you want to reassign the task.	◉ No	
Comments : *		
	Approve Reject Reassign Terminate Hold Cancel] -

• Similarly if at any stage if any of the reviewers click on terminate in the task form then workflow gets terminated.

Document :	BIJ-1111.txt View Documents in folder	^
Requested by :	System Account	
Current Status :	QA Reviewer Approved	
Hold : Please select 'Yes' if you want to put the task on hold.	No	Ш
Reassign Task : Please select 'Yes' if you want to reassign the task.	No O Yes	
Comments : *	*	
	Approve Reject Reassign Terminate Hold Cancel] -

• On Hold option is available only once per tasks life time. If user selects a hold date and clicks on Hold the task will be held till the due date without any escalation.

Document :	
	BIJ-1111.txt
	View Documents in folder
Requested by :	System Account
Current Status :	QA Reviewer Approved
Hold : Please select 'Yes' if you want to put the task on hold.	○ No ● Yes Date is mandatory for putting task on hold.
Comments : *	
	· · · · · · · · · · · · · · · · · · ·
	Approve Reject Reassign Terminate Hold Cancel

• If user clicks on Reassign they can select the reviewers from their group to reassign their task. The due date of the reassigned task will remain the same as the original task.

DC Contact Reviewer	Task Form		×
Document :	BIJ-1111.txt View Documents in folder		
Requested by :	System Account		
Current Status :	QA Reviewer Approved		
Reassign Task : Please select 'Yes' if you want to reassign the task.	○ No ● Yes Please specify the new reviewer username. Please ensure that user belongs to DC Contact user group.	1 the	
Comments : *	•		
	Approve Reject Reassign Terminate Hold C	ancel	

• If user clicks on Add Additional Reviewers after they select the reviewers from their group tasks will be created for the newly added reviewers. Due date for these tasks will be created based on the workflow association form data information. This option to Add Additional reviewers is available only to Dynamic Reviewers.

Dynamic Reviewer Tas	k Form
Document :	ENA-1000.doc
	View Documents in folder
Requested by :	Rajiv Bhat
Current Status :	Author Submit
Additional Reviewers : Please select 'Yes' if you want to add additional reviewers. Existing reviewers will not be changed.	No Yes Please specify additional reviewers. Please ensure that user belongs to the Dynamic Reviewer user group.
Comments : *	
	-
Appro	ove Reject Reassign Terminate Hold Add Reviewers Cancel

- Close option is provided to close the form without recording the decision.
- Emails will be sent accordingly and workflow history logs are created.

9.1 Updating Reviewers from workflow status page.

• After the approval workflow started there will be a field ISOApprovalWF which shows the value as 'in progress'.

IDT	Products	Corporate	Pa	ckages	NPI	ISO	ISO Tasks	
)T ► IS ontains	SO I murthy I SO Documents	All Documents						
3 IS	D		Туре	Name				ISOApprovalWF
i 🛅 T	Folders			BIJ-1111	🔛 NEW			Completed
	Burn-In							
	Environmental			BIJ-2222	22 🛗 NEW			In Progress
	Murthy_latest							
		-						

• Click on the 'in progress' value which redirects to the workflow status page.



Click on 'Update Reviewers' link to update the reviewers of non completed stages.

IDT	Products	Corporate	Packages	NPI	IS0	ISO Tasks	
🔊 Recyc	le Bin e Content	Supervisor					Murthy ;
		Dynamic Approv	/er *				Shiva Adluri ; Please ensure that the user belongs to Dynamic Reviewer user group.
		QA Approver *					Murthy ; Please ensure that the user belongs to QA Reviewer user group.
		DC Contact *					Raiiv Bhat ; Please ensure that the user belongs to DC Contact user group.
							Submit Cancel

- Users can update the current stage reviewers and the upcoming stage reviewers.
- Reviewers who completed their tasks cannot be deleted.
- Emails will be sent accordingly and workflow history logs are created.

9.2 Terminating ISO Approval Workflow

- After the approval workflow started there will be a field ISOApprovalWF which shows the value as 'in progress'.
- Click on the 'in progress' value which redirects to the workflow status page.
- Click on 'Terminate this workflow now' link to terminate the workflow.

IDT	Products	Corporate	Packages	NPI	IS0	ISO Tasks	e
IDT 🕨 We	orkflow Status:	ISOApprovalWF					
Recvo	le Bin	Workflow Informa	tion				
All Sit	e Content	Initiator: Syster	m Account	Do	cument:	BIJ-222222	
		Started: 5/30/2	2012 3:18 PM	Sta	itus:	In Progress	
		Last run: 5/30/2	2012 4:53 PM				
		• Update Review	ers				
		If an error occur all tasks created	s or this workflow by the workflow.	stops respo	nding, it	can be terminated.	Terminating the workflow will set its status to Canceled and will delet
	[Terminate this	workflow now				
		Tasks					
		The following tasks h	ave been assigned to	the participan	nts in this v	vorkflow. Click a task to	edit it. You can also view these tasks in the list ISO Tasks.

- This will delete all the tasks irrespective of the task status.
- Similarly when a document is checked-out after the approval workflow is started all the tasks will be deleted.

10 Escalation Timer

- All the tasks that are created in the ISO Tasks list are monitored by a Timer.
- If the Task due date is completed and no action is taken email reminders will be sent to the task owners and a copy is sent to the author of the document.
- First level reminder emails are sent as per the information configured in the configuration list.
- First level reminder emails will be sent daily till the second level reminder email starts.
- Similarly second level reminder emails will be sent as per the configuration information.

11 Task Delegation

• Any user who wants to delegate the task is required to make an entry in the DCP OOO Information List.



- Accordingly whenever a task is to be created for the user who delegated the task will be created to the delegated user from the date which falls in between the delegation start date and delegation end date.
- "Task owner" is auto populated and hence cannot be edited. User can create his own OOO only



• One user can do one entry only. But user can edit the start date and end date.

12 Starting Test Program Workflow and Training Notification Workflow

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the ISO Document Library, present on the top.
- These workflows will be started automatically after the document is approved/published through the approval workflow.

Cita Artiona – 📥 – D	Library Loois					Rajiv Bhat 🝷 🎪
			E-mail a Link	B. D.	Ö G	i) 😼
New Upload New Document - Document - Folder	Edit Document	View Edit Properties Properties X	''@' Alert Me ↓	Download a	Workflows Publish	I Like Tags & It Notes
New	Open & Check Out	Manage	Share & Track	Copies	Workflows	Tags and Notes
IDT ► ISO ► murthy ► All Do Contains ISO Documents	ocuments 🔻					
ISO ISO	🔲 Туре 🛛	lame		ISOApprovalWF	ISOTrainingNotification	WF ISOTestProgramWF
4 诌 Folders	E	IJ-1111		Completed	In Progress	In Progress
📜 Burn-In						

- Assignees information is recorded initially using the initiation form of ISOApprovalWF.
- Tasks will be created for Test Program Assignees and Training Notification Assignees.

IDT	Products	Corporate	Packages	NPI	IS0	ISO Tasks				0
IDT ▶ Wo	orkflow Status:	ISOTrainingNotificatio	DnWF							
Recyc	le Bin	Workflow Information	on							
All Site	e Content	Initiator: System	Account	Босі	iment:	BIJ-1111				
		Started: 5/30/201	12 4:55 PM	Stat	us:	In Progress				
		Last run: 5/30/201	12 4:55 PM							
		Update Assignees	3							
		If an error occurs o all tasks created by	or this workflow y the workflow.	stops respond	ding, it c	an be terminated.	Terminating	the workflow	will set its status to C	anceled and will delete
		Terminate this wo	orkflow now							
		Tasks								
		The following tasks hav	e been assigned to	the participants	in this w	orkflow. Click a task t	o edit it. You car	n also view these	tasks in the list ISO Task	s.
		Assigned To	Title				Due Date	Status	Related Content	DCP Task Status
		Murthy	Training Not acknowledg	tification Task e BIJ-1111.tx	::Pleas t≣new	e 6	6/1/2012	Not Started	BIJ-1111	

• If all these assignees click on 'I have read and understood' option these workflows gets completed.

Training Notification T	ask Form	□ ×
Requested by :	System Account	^
Current Status :	Approved	
Approved Date :	5/30/2012 4:55:29 PM	
Approved By :	Rajiv Bhat	
Additional Assignees: Please select 'Yes' if you want to add additional assignees. Existing assignees will not be changed.	◉ No ⊚ Yes	
Comments : *		-
	Add Assignees I have read and understood Cano	el]

• If user clicks on Add Additional Assignees after they select the assignees from their group, tasks will be created for the newly added assignees. Due date for these tasks will be created based on the workflow association form data information.

Training Notification T	ask Form		×
Requested by :	System Account		*
Current Status :	Approved		
Approved Date :	5/30/2012 4:55:29 PM		
Approved By :	Rajiv Bhat		
Additional Assignees : Please select 'Yes' if you want to add additional assignees. Existing assignees will not be changed.	No Yes Please specify additional assignees.	ŀ∕ 101	ш
Comments : *			
	Add Assignees I have read and understood	Cancel	

- Close option is provided to close the form without recording the decision.
- Assignees can view the workflow history log and audit history information by clicking on 'View Workflow and Document Audit History'.

Training Notification T	ask Form		×
			-
Document Title :	BIJ-1111.txt View Documents in folder View Workflow and Document Audit History		
Requested by :	System Account		
Current Status :	Approved		ш
Approved Date :	5/30/2012 4:55:29 PM		
Approved By :	Rajiv Bhat		
Additional Assignees : Please select 'Yes' if you want to add additional assignees. Existing assignees will not be changed.	◉ No ⊘ Yes		
Comments : *		*	-

• Workflow history will be the approval workflow history and audit history will be the document's audit history.

View History						×
Document name Folder : Author : Last Reviewer : Last Review Date	s : BIJ-1111.t murthy System Ad Rajiv Bhat e :5/30/2012	txt ccount t 2 4:55:29	9 PM			
Workflow Histo	ory Ev	ent	liser	Description	Outcome	
5/30/2012 4:01:14	PM Cor	nment	System Account	Approval workflow has been started.	outcome	
5/30/2012 4:01:14	PM Tas Cre	k ated	Murthy	Task has been delegated by Vineet Singh		E
5/30/2012 4:40:48	PM Tas Cor	k npleted	Murthy	asdas	Approved	
5/30/2012 4:40:48	PM Cor	nment	System Account	Supervisor Approval Completed. Approval process moved to Dynamic Review.		
5/30/2012 4:40:49	PM Tas Cre	k ated	Murthy	Task has been delegated by Shiva Adluri		
1-5 🕨						, I.
Audit History						
User	Occurred		Event	Vers	sion	
Rajiv Bhat	5/29/2012 12	2:28:50	Update	0.1		-

• Emails will be sent accordingly and workflow history logs are created.

12.1 Updating Reviewers from workflow status page

• After the Test Program Workflow and Training Notification Workflow started there will be fields TestProgramWF and TrainingNotificationWF which shows the value as 'in progress'.

Site Actions 🗸 🐋 Browse	Library Tools					Rajiv Bhat 👻 🌺
New Upload Document + Folder	Edit Document	View Edit Properties Properties X	📄 E-mail a Link 🧐 Alert Me ↓	Download a Copy	Workflows Publish	i Like Tags & Notes
New	Open & Check Out	Manage	Share & Track	Copies	Workflows	Tags and Notes
IDT ► ISO ► murthy ► All D Contains ISO Documents	ocuments 🔻					
ISO	Type N	ame		ISOApprovalWF	ISOTrainingNotification	WF ISOTestProgramWF
4 🛅 Folders	E B	D-1111		Completed	In Progress	In Progress
Burn-In						

• Click on the 'in progress' value which redirects to their respective workflow status page.

IDT	Products	Corporate	Packages	NPI	ISO	ISO Tasks	;			
IDT ► Wo	orkflow Status:	ISOTrainingNotificat	tionWF							
🔊 Recycl	le Bin	Workflow Informat	tion							
All Site	e Content	Initiator: System	Account	Do	cument:	BIJ-1111				
		Last run: 5/30/2	012 4:55 PM 012 4:55 PM	Sta	tus:	In Progress				
		Update Assigned If an error occurs all tasks created Terminate this v	es s or this workflow by the workflow. vorkflow now	stops respo	nding, it (can be terminate	d. Terminating	g the workflow	will set its status to C	Canceled ar
		Tasks								
		The following tasks ha	ave been assigned to	the participan	its in this w	orkflow. Click a task	to edit it. You ca	an also view these	e tasks in the list ISO Tas	ks.
		Assigned T	o Title				Due Date	Status	Related Content	DCP Ta
		🔳 Murthy	Training No acknowledg	tification Tas e BIJ-1111.	sk : Pleas txt ≣new	e	6/1/2012	Not Started	BD-1111	

Click on 'Update Assignees' link to update the assignees if the workflow is not completed. 🖓 🔻 🔊 👻 🖃 📥 👻 Page 👻 Safety 👻 Tools 👻 🔞 💌

× revenites		w woodification Form					🖬 - 🔟 - 🔤 🥁 - ruge - surety	10013 - 0
Site Actions	- 🐋						R	ajiv Bhat 🖌 📩
		Ë?					Search this site	Tags & Notes
IDT	Products	Corporate	Packages	NPI	ISO	ISO Tasks	Go	9
All Site	e Bin e Content	Training Notifica	ation Users *			[Murthy ; Karun Kumar ;	
							Submit	Cancel

- Assignees who completed their tasks cannot be deleted. ٠
- Emails will be sent accordingly and workflow history logs are created. •

12.2 Terminating Test Program Workflow and Training Notification Workflow

• After the Test Program Workflow and Training Notification Workflow started there will be fields TestProgramWF and TrainingNotificationWF which shows the value as 'in progress'.

	Library Tools					Pajiy Bhat 🗸 🔖
Site Actions 👻 対 Browse	Documents Librar	У				
* `` † ` 📄	× D. D		📄 E-mail a Link	A D.	Ch Do	
Naw Upload No		View Edit	🙀 Alert Me 🗸	Download a	Workflows Publish	Like Tage %
Document + Document + Fold	er Document	Properties Properties X		Copy		It Notes
New	Open & Check Out	Manage	Share & Track	Copies	Workflows T	Tags and Notes
IDT ▶ ISO ▶ murthy ▶ Al Contains ISO Documents	Documents 🔻					
ISO	🔲 Туре 🕴	lame		ISOApprovalWF	ISOTrainingNotification	WF ISOTestProgramWF
🖉 🤷 Folders	(E) E	BIJ-1111		Completed	In Progress	In Progress
📜 Burn-In						

• Click on the 'in progress' value which redirects to their respective workflow status page.

IDT	Products	Corporate	Packages	NPI ISC) ISO Tasks			(
IDT 🕨 W	orkflow Status:	ISOTrainingNotificat	ionWF					
A Recvo	le Bin	Workflow Informat	ion					
All Sit	te Content	Initiator: System	Account	Documer	nt: BIJ-1111			
		Started: 5/30/20	012 4:55 PM	Status:	In Progress			
		Last run: 5/30/20	012 4:55 PM					
		Update Assignee	s					
		If an error occurs all tasks created t	or this workflow s by the workflow.	stops responding,	it can be terminated. Termir	nating the workflow	will set its status to C	anceled and will de
		Terminate this w	vorkflow now					
		Tasks						
		The following tasks ha	ve been assigned to	the participants in thi	s workflow. Click a task to edit it.	You can also view thes	e tasks in the list ISO Task	s.
		Assigned T	o Title		Due Da	ate Status	Related Content	DCP Task Status
		Murthy	Training Not acknowledge	ification Task : Ple e BIJ-1111.txt ≅™	ease 6/1/201	2 Not Started	BIJ-1111	

- Click on 'Terminate this workflow now' link to terminate the workflow.
- This will delete all the tasks irrespective of the task status

13 Search

13.1 Keyword Search

Type a word and click on search button and the results will be show in 13.3 Search Results

Site Actions	- 🐋						System Acco	unt +
		2					DIDT. Integrated Device Technology	
Doc	ument Contr	ol Portal					Search this site GO	N
IDT	Products	Corporate	Packages	NPI	ISO	ISO Tasks		

13.2 Advance Search

Advance search will be accessible from the Search Results page by clicking below highlighted link:

h ∙ Search	Results	Ø	-	(2)
	All Sites People			
	cbu Preferences Advanced			
	1-10 of 14 results	₽	2	~
ре				
	CBU 2012-03-06T00:00:00Z Authors: System Account, Chandra Madhumanchi Date: 3/6/2012 Size: 46KB Product Line: SES Document Type: Advertising Business Unit: CBU http://122.181.132.122:7001/Corporate Literature/r423_ADV_20120306.doc			
22:7	 test123 CBU SES h1 g1 Articles English Not Published s1 Delete Chandra Madhur Made Unavailable from IDT.com 99210a6f-e90c-4f06-bb09-faa3d777e30e 1 fdf Authors: Chandra Madhumanchi Date: 1/23/2012 Size: 34KB Product Line: SES Business Unit: CBU http://122.181.132.122:7001/Corporate Literature/gdfgdgsrwerwr_ATC_20120123.docx 	mancl	ni	

Users will be able to search based on the highlighted document metadata shown in the below image

All of these words:	cbu					
The exact phrase:						
Any of these words:						
None of these words:						
Only the language(s):	English					
	French					
	🔲 German					
	Japanese					
	Simplified Chinese					
	Spanish					
	Traditional Chinese	1				
Result type:	All Results					
Add property res	strictions					
Where the Property	(Pick Property)	Contains	-		And	- +
	(Pick Property) Author					
	Description					Search
	Size (bytes)					
mprove your searche	URL Uset Medified Date					
	Created By					
	Last Modified By					
	I Product Line					

Users can choose to add multiple property restrictions using "+" symbol.

All of these words:	that have				
The exact phrase:					
Any of these words:					
None of these words:					
Only the language(s):	English				
	French				
	🕅 German				
	Japanese				
	Simplified Chinese				
	Spanish 📃				
	Traditional Chinese				
Result type:	All Results				
Add property re	strictions				
Where the Property	Product Line Co	ntains	ACS	And	-
	Document Type 💌 Do	es not contain 💌	Reflow profile	And	-

13.3 Search Results

The highlighted data in red are the additional properties that are configured to show the data if the data exists.

1	Test CPT 20111222.docx English Test Published ACS APD Carrier / Package Type Made Available to IDT.com 774847a9-c3d1-492b-b903-10b8f9015974 0x010100FBF56CE66B6F9141A87BB97AAEA6316C00833EF5B6D5E097409901B9BA2B9F3428 Authors: Papi Gbadge, Winwire, Date: 1/5/2012, Size: 35KB
	Product Line: ACS Document Type: Carrier / Package Type Business Unit: APD http://122.181.132.122:7001/Packages/Test_CPT_20111222.docx
•	test ATC 20111222.docx APD APC test Articles English Published System Account Updating Status using Event Handler 2ab8b1fa-1019-46ab-8a5b-27e370cd5528 1 Dsfsdafsadfsaasdfsadfsdfasdfds sdfsdfsadfsdaf

Authors: Rani Ghadge, Winwire, Date: 1/23/2012 Size: 31KB Product Line: APC Business Unit: APD

http://122.181.132.122:7001/Corporate Literature/test_ATC_20111222.docx

14 ISO Tasks web parts

• My Active Tasks Web part for reviewers:

Site Actions 👻 📸				Murthy 🗸	
DCP				tegrated Device Technology Tag	8 es
Document Control Portal			Search this sit	GO	
IDT Products Corpora	te Packages NPI ISO ISO	Tasks			?
IDT >					
Summary Links	My Active Tasks			• [
000 List		1 - 10	Next		
Recent Posts	Title	Due Date	Status	DCPWFInstanceID	
09.14.2011 Domainss Short	Test Program Task : Please acknowledge BIJ- 1111.txt ≅ №₩	6/1/2012	Not Started	bb9341a3-ecc7-4d76-945b-d2a160e340ed	
More	Training Notification Task : Please acknowledge BIJ-1111.txt 🛚 🕬	6/1/2012	Not Started	8b7c2504-0879-4707-b971-68317961cd94	
Embedded Computing Embedded Computing minimum More	Dynamic Reviewer Task : Please approve BIJ- 222222.txt 🛚 🕬	6/2/2012	Not Started	b54e4476-6dcb-4306-affd-5f2460eb8f8c	
09.30.2011	Test Program Task : Please acknowledge DRJ- sp22.xls	5/31/2012	Not Started	3f4b89aa-eafb-45b5-9158-051cb91f235a	

• All tasks Web Part: (this is for DC Contact)



15 How to use "Move Document" functionality?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to Publish the Document.
- Click on the arrow button, present on the right side of the Name field, for the document which we want to perform Move To operation.
- A new popup box would appear (as shown in below fig).
- Now click on "*Move To*" as shown in below fig.

ID Document ID Type Name	Start Publish Date
17096 Y3DKPQAQS6MP Z CV115-2_DST_2 -3-17096	20050713
Add new item	😪 Move To
	View Properties Edit Properties Edit Document Check Out Unpublish this version Version History
	Compliance Details Workflows Alert Me

- A new window would appear as shown in the below fig.
- First, select the type of operation which we want to perform on document ("*Move*" operation will delete the document from the source path and will create a new document at the destination path).
- Now click on "*Browse*" button as shown in the below fig.

Action: Destination URL:	Move	Browse
History:	Version History 🔲 Audit History	
Overwrite:	Overwrite if a file with same name exists	
	Submit Cancel	

- On click of "*Browse*" button a new window would appear asking users for selecting the destination path for the document (shown below).
- Select the destination path for the document.
 NOTE: A document could be moved only within the document library (i.e., we cannot move a document belonging to one Document Library, say A, to another Document Library, say B. Both source and destination document libraries should be same).
- Now click on "**OK**" button to continue.



- Now the destination path would appear in the text box as shown below, in fig.
 NOTE: If user knows the destination path, then in that case they don't need to select the path from the folder browser. They, can directly type the path. The path entered should be of a folder, not of a file. If user enters the file path then an error would be thrown, while performing the action.
- There are few check boxes in the screen. Here are functionalities of the different check boxes:
 - **Version History**: When checked, the file created at the destination location will also have the version history copied from the source.
 - **Audit History**: When checked, the file created at the destination location will also have the Audit History copied from the source.
 - **Overwrite if a file with same name exists**: When checked, if a file with the same name already exists at destination path, then that file would be overwritten with the new one and new file would be saved as a new version to that file.

• Now, select the appropriate check box and click on "*Submit*" button.

Action:	Move	
Destination URL:	http://122.181.132.121:2000/Lists/Prc Browse]
History:	Version History Audit History	
Overwrite:	Overwrite if a file with same name exists	
	Submit Cancel	

- Now based on the success/failure of operation, appropriate message will popup (shown in below fig).
- Click on "*Exit*" to exit the screen.

Action:	Move	
Destination URL:	http://122.181.132.121:2000/Lists/Prc Browse	
History:	Version History Audit History	
Overwrite:	Overwrite if a file with same name exists	
	Exit Action Completed Successfully.	

16 How to use Convert to PDF Feature?

Convert to PDF is a custom action which is provided to IDT. This feature is used for converting the supported documents to PDF format. The document formats which this functionality supports are *.doc, .docx, .xls, .xlsx, .ppt, .pptx*. This feature could be used either from ECB menu (if only one

document has to be converted to pdf) or from ribbon control (if more than one document has to be converted). Here are the steps to be used for this purpose:

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to convert a document to pdf.
- Now select the checkbox against the document, which you want to convert to pdf (as shown in the below screen shot).
- Navigate and click to "Convert to PDF" Link.



- A new window would appear as shown below.
- Click on "Yes" button to continue.



 After this a confirmation message would be shown to user (as shown below). Click on "Close" button to continue.



- On click of "*Close*" button a new request would be raised for conversion of the document.
- User will receive an email confirming the document conversion and also in case of failure (there could be a delay of half an hour or more for conversion process to complete).
- The same process could also be done using Ribbon Control. After selecting one or multiple documents we need to click on "*Convert to PDF*" icon from the ribbon control (as shown in below fig.), rest of the process is same.



<u>NOTE</u>: "**Convert to PDF**" feature would be available only for those document libraries which will have an entry as "**Yes**" in "**MakeAvailableConfigList**" list.

17 How to make a document available to <u>www.idt.com</u> or make it unavailable from IDT.com site?

17.1 Make available to IDT.com feature

- This feature makes the select document(s) available for the <u>www.idt.com</u> import job to import it into **www.idt.com** site.
- Login to the DCP site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on top navigation of the site in which the Document you want to work with is present.
- Now select the checkbox against the document, which you want to make it available on www.idt.com (as shown in the below screen shot),
- Under the "*Library Tools*" tab on ribbon control, select "*Documents*" tab, as shown in fig.
• Now click "*Make available to IDT.com*" button, with arrow sign (shown in below fig.) from ribbon control, for publishing the document.

	Libra	ry Tools								
Site Actions 👻 📷 Browse	Document	s Libr	rary							
New Document 🗸 🛛 🔤 📿	Convert to PDI	-			_b		== 		🚘 E-mail a Link	l
🎦 Upload Document 🗸 😥 N	1ake Available	to IDT.	com		La			Æ	💷 Alert Me 🗸	l
📸 New Folder 🛛 🕑 N	1ake Unavaila	ble from	IDT.com	Docum	ent 📄	Properties	Properties	×		
7	lew			Open & C	heck Ou	ut M	lanage		Share & Track	
IDT ▶ Products ▶ 1_Gene	eric Docs 🕨 A	ll Docum	ients 👻							
Products] ID	Generic I	D Multi	Туре	Name				-
🖉 🎦 Folders] 16590			Ð	123_APN_20	120528			
ACS		8403				ACS422xx00	_MAR_201	10722	2	

- On click of "*Make available to IDT.com*" Icon, a new window would appear, prompting user to publish the document, as shown in below fig.
- Click on "*OK*" button to publish the document.

Export Data				×
IDT ▶ Export Data				
You have selected the fo	ollowing items to start p	ublishing.		
Items	LastpublishedTime	CurrentTime	TimeDelay	
123_APN_20120528.txt	5/28/2012 7:57:52 PM	6/5/2012 3:56:13 PM	11278	
L				
OK Cancel				

- After publishing, the "Is Public" column of the document will have "Publish" as the Value.
- The original document and its metadata XML could be found in configured location

1	ID	Generic ID Multi	Туре	Name	•	Is Public	Document ID	1
	16590		P	123_APN_20120528	L	Published	Y3DKPQAQS6MP -3-16590	

	Name 🔶	Date modified	Туре	Size
	2123_APN_20120528_120605160207	6/5/2012 4:02 PM	XML Document	1 KB
Ì	🖹 Details_120528195641	5/28/2012 7:56 PM	XML Document	1 KB
	📄 Details_120528195751	5/28/2012 7:57 PM	XML Document	1 KB

Note: Only those documents which are in "Approved" status could be published.

17.2 Make unavailable from IDT.com

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to delete the Published Document.
- Now select the checkbox, present just before every item (shown in fig.), corresponds to the published document which we want to delete.
- Under the "*Library Tools*" tab on ribbon control, select "*Documents*" tab, as shown in fig.
- Now click "*Make Unavailable from IDT.com*" button, with stop sign (shown in below fig.) from ribbon control, for deleting the published document.



On click of "*Make Unavailable from IDT.com*" Icon, a new window would appear, prompting user to export the document, as shown in below screen shot.

Export Data			
IDT ▶ Export Data			
You have selected the fo	llowing items to stop p	ublishing.	
Items	LastoublishedTime	CurrentTime	TimeDelay
123_APN_20120528.txt	6/5/2012 4:02:07 PM	6/5/2012 4:02:53 PM	0

OK Cancel

- Click on "OK" button to export the document.
- After un-publishing, the document would automatically be deleted from the location.

NOTE: Even though user doesn't have permission, he/she will still be able to see the "**Publish to IDT.com/ Delete from IDT.com**" but as soon as they will click on these ribbon buttons and will start Publishing or deleting a document, they will get below error (shown in fig).



18 Administration /Super User Tips & Tricks

18.1 Security

In SharePoint securities are maintained by creating the groups and then assigning appropriate permissions to those groups. A SharePoint group is nothing but a set of individual users. A SharePoint group can also include the Active Directory Group.

18.1.1 How to Create SharePoint Groups and Grant Permissions to them?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the "*Site Actions*" tab present on top left corner of the site (as shown in fig below).
- After Clicking a new popup would appear.
- Now click on "Site Permissions" icon, as shown in figure



- After Clicking the "*Site Permissions*" link, a new window would appear, displaying all the User's/Groups' permissions (as shown in fig. below).
- On top left, Ribbon Control (shown in the fig.), there is a "*Create Group*" icon, Click on that to create the group.

		Permission To	ols			
Site Actions 👻 🐋	Browse	Edit				
Grant Permissions	Edit User Permission	Remove User Permissions	Check Permissions	🐝 Permission Levels 📸 Manage Access Requests		
Gran	M Dis site bas	odify	Check	Manage	age. Show me uniquely secured content	
Some content on a		Name	sions which	are not controlled from this p	Type	Permission Levels
Libraries		. Nome				Permission Levels
Documents		Approvers			SharePoint Group	Approve
Products		Chandra Ma	dhumanchi (WI	NWIREBLR (madhumanchi)	User	Full Control
Liete		Designers			SharePoint Group	Design, Limited Access
Tasks		Hierarchy M	anagers		SharePoint Group	Manage Hierarchy
		IDT Member	s		SharePoint Group	Contribute
A Recycle Bin		IDT Owners			SharePoint Group	Full Control
All Site Content		IDT Visitors			SharePoint Group	Read

- After Clicking on "*Create Group*" icon, a new window would appear, as shown in the below fig., prompting users to enter the Group Name and other details.
- Enter the details, grant permissions (shown in below fig.) and click on "*Create*" button to create the group.

Harris and maximum rest action group.	Asma:
	※なるらいでは高行が通貨を通回 A ALE / 21目前単単目目前例(▲ 301 年)
Nemer The source can change anything about the group such as adding and removing members or eleting the group. Only one user or group can be the owner.	Group teamer: Vineet Singh : Ser La
Group Settings beefy who has permission to see the list of group members and who has permission to add and enove members from the group.	Who can view the membership of the group? © Group Members © Everyone Who can edit the membership of the group? © Group Members

users will automatically be added or removed when they make a request.	Auto-accept requests?
Caution: If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.	Yes No Send membership requests to the following e-mail address:
Give Group Permission to this Site (peof/ the permission level that you want members of this SharePoint group to have on this site. I you do not want to give group members access to this site, ensure that all checkboxes are medicated. New site permission assignments	Choose the permission level group members get on this site: http://122.18.132.122.7000 Full Control - Has full control. Design - Can view, add, update, delete, approve, and customize. Contribute - Can view, add, update, and delete list items and documents. Read - Can view pages and list items and download documents. Manage Hierarchy - Can create sites and edit pages, list items, and documents. Reatricted Read - Can view pages and documents, but cannot view historical versions or user permissions. View Only - Can view pages, list items, and documents. Document types with server-view dife file handlers can be viewed in the browser but not downloaded.
	Create Cancel

18.1.2 How to Change the permissions a Group/User:

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the "*Site Actions*" tab present on top left corner of the site (as shown in fig below).
- After Clicking a new popup would appear.
- Now click on "Site Permissions" icon, as shown in figure



- After Clicking the "*Site Permissions*" link, a new window would appear, displaying all the User's/Groups' permissions (as shown in fig. below).
- Check the Checkbox, present before every user/group, for which we want to edit the permission (shown in fig. below, its "*Approvers*" group in our case).
- Now click on "*Edit User Permissions*" icon present on the Ribbon control (shown in below fig.).

	F	Permission Too	ols			
Site Actions 👻 📑 Br	rowse	Edit	_			
Grant Create Per	Edit User ermissions	Remove User Permissions	Check Permissions	🐺 Permission Levels 📸 Manage Access Requests		
Grant	MOG	lify	Check	Manage		
Some content on this	site has u	nique permis	sions which	are not controlled from this p	ge. Show me uniquely secured content	
Libraries		Name			Туре	Permission Levels
Documents		Approvers			SharePoint Group	Approve
Products		Chandra Ma	dhumanchi (WI	NWIREBLR (madhumanchi)	User	Full Control
Lists		Designers			SharePoint Group	Design, Limited Access
Tasks		Hierarchy M	anagers		SharePoint Group	Manage Hierarchy
		IDT Member	s		SharePoint Group	Contribute
Recycle Bin		IDT Owners			SharePoint Group	Full Control
All Site Content		IDT Visitors			SharePoint Group	Read

On click of "*Edit User Permissions*" icon, a new window would appear (shown in below fig.).Select the appropriate check box (shown in below fig.) and click "*OK*" button to grant the selected permissions.

osers of droups	Users:	
The permissions of these users or groups will be modified.	Approvers	
Choose Permissions Choose the permissions you want these users or groups to have.	 Permissions: Full Control - Has full control. Design - Can view, add, update, delete, approve, and customize. Contribute - Can view, add, update, and delete list items and documents. Read - Can view pages and list items and download documents. Approve - Can edit and approve pages, ist items, and documents. Manage Hierarchy - Can create sites and adit pages, list items, and documents. Restricted Read - Can view pages and locuments. View Only - Can view pages, list items, and documents. View Only - Can view pages, list items, and documents view historical versions or user permissions. View Only - Can view pages, list items, and documents the browser but not downloaded. 	E
F	ОК Салсеі	

18.1.3 How to add users to the Groups?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the "Site Actions" tab present on top left corner of the site (as shown in fig below).
- After Clicking a new popup would appear.
- Now click on "Site Settings" icon, as shown in figure



- A new window would appear showing all the settings (based on user's permissions), as shown in fig. below.
- From "*Users and Permissions*" Section, select "*People and groups*" as shown in the below fig.



- A new window would appear as shown in the below fig.
- On left hand side, Quick Launch Bar, we have all the groups, select the group where we want to add users.
- Now, on right had side (as shown in fig.) click on "New" and then "Add Users" as shown.

IDT > Site Set Use this group to	tings > People and Groups - IDT Men grant people contribute permissions to the Shar	nbers ePoint site: IDT	
Home			
Groups IDT Members IDT Visitors IDT Owners Style Resource Readers	New Actions Settings Add Users Add users to this group.	Name Vineet Singh	About me
Designers Hierarchy Managers Approvers Restricted Readers Quick Deploy Users			

- On Click of "*Add Users*" a new window would appear, as shown in the below fig., prompting user to enter the new user which has to be added to the group.
- Add the user's name, validate it by clicking on icon (shown in fig) and then click "**OK**" button to add the user.
- User is now part of the group.

18.1.4 How to add permission of a Security Groups to any folder?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to send the Document Link.
- Click on the arrow button, present on the right side of the Name field, for the folder for which we need to set the permission.
- Now take the cursor to "*Manage Permission*" option.

ID	Туре	Name			Title
54 88		ACS			-
5511		APC	-	Move Document View Properties	
5608		AUI	I	Edit Properties	
13410		CCP	Ś	Compliance Details Workflows	
7403		FCM	5	Connect to Outlook Alert Me	
12114		MIP	æ	Manage Permissions	
7406		NET	×	Delete Change New Button Order	
5651		PCS			

- A new window would appear as shown in below fig. This window will show all the users and security groups which have permission on this folder.
- Click on "Stop Inheriting Permission" Icon.
- On click of "Stop Inheriting Permission" a popup would appear as shown below. Click on "**OK**" button to continue.

Site Actions 👻 📷	Permission Tools Browse Edit	
Manage Stop In Parent Permis	heriting ssions Check Permissions Check	
This folder inhe	rits permissions from its parent. <u>(Home)</u>	
Home Permis	Message from webpage	
Libraries Documents	You are about to create unique permissions for this folder. Changes	Permis Full Co
Products	longer affect this folder.	Full Co
karunstest		Approv
Site Pages	OK Cancel	Full Co
Test1234 WordToPDFC	Chandra Madhumanchi User Coversio (MINMIRERI R) madhumanchi)	Full Co

- On click of "**OK**" button, same window would appear with check box before each security group.
- Check the check boxes, present before the security group, for those security groups which we don't want to have permission for the folder.
- Now click on "*Remove User Permission*" link, present on Ribbon control, to remove those permissions.
- A new popup would appear as shown in the fig.
- Click on "*OK*" button to apply the permission.

Grant ermissions Grant	Edit User Permissions	Remove User Permissions	Check Permissions Check			
unique pern sions: tests o assign use	nissions an Mes ers and	Are you and grou	age sure you want to remo ups to "testsan"?	ove all permissions for the se	elected users	ed Access
	Z CBU			OK	Cancel Full Control, Lim	ted Access
R. I.	Chang	dra Madhumanchi		User	Full Control	

18.2 Site Administration

18.2.1 How to enable the Metadata navigation settings on "Products" document library?

- Navigate to **IDT Home** page and click on "*Products*" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "*Library*" under the "*Library Tools*" section of Ribbon control.

			Library To	ools
ite Actions 👻 🔂 🛛 Bro	wse	Doci	uments	Library
IDT Produce IDT List Instance	cts ► e	All (Docum	ents -
Libraries		ID	Туре	Name
Site Pages Shared Documents		8	N	Test2
Products				
	÷	Add n	ew item	

• Now in settings Section, click on list settings. It will appear the following screen.

Name:	Products		
Web Address:	http://wwsp2010	0dev1:7001/Lists/Products/Forms/Folder View.aspx	
Description:	IDT List Instance	e	
General Settings		Permissions and Management	Communications
Title, description and	I navigation	Delete this document library	RSS settings
Versioning settings		Save document library as template	
Advanced settings		Permissions for this document library	
Validation settings	e settings	Manage files which have no checked in version	
Rating settings	e settings	Workflow Settings	
Audience targeting s	ettings	Generate file plan report	
Metadata navigation	settings	Enterprise Metadata and Keywords Settings	
Per-location view settings		Information management policy settings	

• Click on "*Metadata navigation settings*". The following screen would appear.

	butter and a second for the second se	Metadata Navigation Settings X	UV W
Actions 👻 対			Chandra Madhumanchi 🔸
IDT > Pr Use this pa	roducts Document Library Settings N age to configure metadata navigation hierarchies an	Metadata Navigation Settings d key filter input controls.	I Like It Tags & Notes
me	Configure Navigation Hierarchies	Available Hierarchy Fields:	Selected Hierarchy Fields:
	Select from the list of available fields to use them as navigation hierarchies for this list. Selected fields will appear under this list in the Site Hierarchy tree view. You can expand these fields and select one of their values to filter your current view to show only items matching that value. Fields that are available for use as navigation hierarchies include columns on this list that are one of the following types: 	Business Unit Content Type Document Type Folders MMProductTree Product Line Product Tree Add >	
	- Single-value Choice Field - Managed Metadata Field	Description: Choice - No Description	•
	Configure Key Filters Select from the list of available fields to use them as key filters for this list. Selected fields will appear underneath the Site Hierarchy tree when viewing items in this list. You can use these fields to filter your current view to show only items matching that value. Fields that are available for use as navigation hierarchies include columns on this list that are one of the following types: - Content Type - Choice Field	Available Key Filter Fields: Content Type Created By Document Type MMProductTree Modified By NexPrise_Reference_ID Product Line Product Tree Revision Date Start Publish Date Stop Publish Date	Selected Key Filter Fields:
	- Managed Metadata Field - Person or Group Field - Date and Time Field - Number Field Configure automatic column indexing for this list	Description: Content Type Id - No Description	

- Under configure Navigation Hierarchies select the "*Folders*", "*Business Unit*", "*Product Tree*" and click on Add Button.
- Under Configure key Filters section select the "*Content type*" and Click on "*Add*" button.
- The follow screen would appear.
- Click on "*OK*" button.

🕑 🗢 📴 http://w	wsp2010dev1:7001/_layouts/MetaNavSettings.aspx?Lis	🗠 🔎 🛫 🚱 Metadata Navigation Settings 🗙	û x
Actions 👻 📫			Chandra Madhumanchi 👻
Use this page t	o configure metadata navigation hierarchies an	d key filter input controls.	I Like It Tags & Notes
me			3
	Configure Navigation Hierarchies Select from the list of available fields to use them as navigation hierarchies for this list. Selected fields will appear under this list in the Site Hierarchy tree view. You can expand these fields and select one of their values to filter your current view to abow only items matching that value. Fields that are available for use as navigation hierarchies include columns on this list that are one of the following types: - Content Type - Single-value Choice Field - Managed Metadata Field	Available Hierarchy Fields: Contant Type MMProductTree Product Line Add > Add > Add > Contant Type Description: Content Type Id - No Description	Selected Hierarchy Fields: Folders Product Tree Business Unit
	Configure Key Filters Select from the list of available fields to use them as low filters for the list. Selected fields will appear undermeath the Site Hierarchy tree when viewing items in this list. You can use these fields to filter your current view to show only items matching that value. Fields that are available for use as navigation hierarchies include columns on this list that are one of the following trypes: - Content Type - Choice Field - Person or Group Field - Date and Time Field - Number Field	Available Key Filter Fields: Business Unit Checked Out To Created By Document Type MMProductTree Modified By NexPrise_Reference_ID Product Tree Revision Date Start Publish Date Description: Choice - No Description	Selected Key Filter Fields:
	Configure automatic column indexing for this list Specify whether to automatically create indices on this lat that will increase the performance of	Automatically manage column indices on this list. C Do not modify column indices on this list.	

18.2.2 Site Collection:

On top of the Hierarchy we have a site collection, named IDT, which holds all the data present in the portal. This acts as a top level site for holding the contents, List/Document Libraries, portal pages, content types, features, web parts etc. This top level site collection is made using the "*Document Center*" template present inside the "*Microsoft Office SharePoint Server 2010*".

18.2.3 Lists:

In the IDT top level site collection, we have a few custom Lists which are used to store configuration data. The following sections describe each of these lists:

18.2.3.1 WFApprovedList:

This List is used for storing the "*Business Unit*" and "*Document Type*" fields. The combination of these 2 fields decides whether the document will have to undergo an approval process. Document will be auto Approved if the "*Business Unit*" and "*Document Type*" values aren't present in this list.

The list also has another column "*DocumentApprover*". This column specifies the Approver's name for a "*Business Unit*" and "*Document Type*" combination. So when the workflow starts, then the task will be assigned to this approver for approving the document.

E.g., in the below given figure., for the combination of "**COM**" as "**Business Unit**" and "**Datasheet**" as "**Document Type**", the workflow will run and the task for completing the workflow would be assigned to "**Rajiv Bhat**" (refer "**DocumentApprover**" column for that particular combination, highlighted in red)

DocumentApprover	Do	Document Type	Ø Business Unit	U
Chandrashekar Reddy	Ch	Application Note/Technical Paper	VDO	_
Rajiv Bhat	Raj	Datasheet	COM	- [
Zuber Ahmed	Zu	Software Tool	NETCom	
			d new item	Add r
			d new item	Add r

NOTE: Please note that the data shown above is sample data. The original production data may vary. This data could be setup or changed at any point of time.

18.2.3.2 Configuration:

This List is used for storing the configuration data for the site and us used for implementing the business logic for few of the functionalities in the portal. This configuration data, if not set properly, can break the solution.

18.2.3.3 MakeAvailableConfigList:

This List is used for storing the document library's name where "*make available to IDT*" and "*Convert To PDF*" feature has to be activated.

18.2.3.4 DCPErrorMessageList:

This List is used for storing the error messages which are generated due to Auto Push to IDT feature.

18.2.3.5 EmailTemplate:

This List is used for storing the email template which has to be sent to different user's when PDF conversion feature completes successfully or it fails.

18.2.4 Document Libraries:

Apart from few Lists, we also have a Document Library, which is used to store the documents uploaded by different users. Here are few of the Document Libraries present in DCP site.

18.2.4.1 Products Document Library:

This Document Library is the central repository for storing all the marketing and Change Notification documents. This document Library has "*Marketing*" and "*Change Notification*" content type associated with it. Users will be prompted to enter the metadata while uploading a document and the metadata will be stored along with the document.

18.2.4.2 Package Document Library:

This Document Library is the central repository for storing all the Package documents. This document Library has "*Package Documents*" content type associated with it. Users will be prompted to enter the metadata while uploading a document and the metadata will be stored along with the document.

18.2.4.3 Corporate Document Library:

This Document Library is the central repository for storing all the Corporate documents. This document Library has "*Corporate Literature*" content type associated with it. Users will be prompted to enter the metadata while uploading a document and the metadata will be stored along with the document.

18.2.4.4 NPI Document Library:

This Document Library is the central repository for storing all the NPI documents. This document Library has "*NPI Document*" content type associated with it. Users will be prompted to enter the metadata while uploading a document and the metadata will be stored along with the document.

18.2.4.5 ISO Document Library:

This Document Library is the central repository for storing all the ISO documents. This document Library has "*ISO Document*" content type associated with it. Users will be prompted to enter the metadata while uploading a document and the metadata will be stored along with the document.

18.2.5 Content Types:

18.2.5.1 Marketing:

This custom content type is a part of "*DCP Document Types*" group. This is attached to "*Products*" Document Library and used for storing the attached document metadata which are uploaded to "*Products*" Document Library.

18.2.5.2 Change Notification:

This custom content type is a part of "*DCP Document Types*" group. This is attached to "*Products*" Document Library and used for storing the attached document metadata which are uploaded to "*Products*" Document Library and have PCN, PDN or Errata as document types.

18.2.5.3 Corporate Literature:

This custom content type is a part of "*DCP Document Types*" group. This is attached to "*Corporate*" Document Library and used for storing the attached document metadata which are uploaded to "*Corporate*" Document.

18.2.5.4 Package Documents:

This custom content type is a part of "*DCP Document Types*" group. This is attached to "*Packages*" Document Library and used for storing the attached document metadata which are uploaded to "*Packages*" Document Library.

18.2.5.5 NPI Documents:

This custom content type is a part of *"DCP Document Types"* group. This is attached to *"NPI"* Document Library and used for storing the attached document metadata which are uploaded to *"NPI"* Document Library.

18.2.5.6 ISO Documents Content Types:

ISO Drawing, ISO Form, ISO PDAE, ISO SCD, ISO Spec, ISO Test Program, ISO Workflow Prop

The above content types are part of *"ISO Content Types"* group. This is attached to *"ISO"* Document Library and used for storing the attached document metadata which are uploaded to *"ISO"* Document Library.

18.2.6 Adding Site Columns to Libraries

Site columns which are required for storing metadata and not required for display in forms are added to libraries directly instead of adding them to content type.

To add a site column to document library follow the below steps.

- a. Open the sharepoint site in the browser.
- b. Click on Site Actions \rightarrow View All Site Content
- c. Click on the library in which site column need to be added.
- d. Click on the Library tab which appears on the ribbon.
- e. Click on Library Settings and under the Columns section click on 'Add from existing site columns'
- f. Select Column Name as shown in the below screenshot.

	Select site columns from:		
lect which site columns to add to this list.	DCP Columns		
	Available site columns: Association Audit History Business Unit CL Busine Audit History CL Document Type Document Type Generic ID Generic ID Multi Identifier Description: None Group: DCP Columns	Add >	
tions	Add to all content types Add to default view		

g. Click Add and then 'Ok'

18.3 Setting up Metadata Navigation:

Metadata Navigation provides the virtual mapping of a document to a path. A document can be tracked with the help of these navigations.

18.3.1 How to create managed metadata term in Central Admin?

- Navigate to SharePoint 2010 Central Administration/ Manage Service Applications and clicking on Metadata Service.
- You can achieve the same by highlighting the service application and clicking on the Manage icon located in the ribbon



• A new window would appear, this window is also referred to as the Term Store Management Tool.

Site Actions 🕶 📸			System Account +
SharePoint 2010 Central Admir	istration → Site Settings → Term Store Managem	nent Tool	I Like It Tags & Notes
		Search this site	۵ م
TAXONOMY TERM STORE English Managed Meta data Service	PROPERTIES Managed Metadata Service Available Service Applications A site may consume multiple metadata applications. Select the one to see in the tree view. Sample Import The SharePoint metadata manager can import a term set from a UTF-8 CSV format file. Use the sample file as a template for creating import files. Then import the file into the desired group to create a new term set. Term Store Administrators You can enter user names, group names, or e-mail addresses. Separate them with semicolons. These users will be permitted to create new terms set groups and assign users to the group manager role.	Managed Metadata Service View a sample import file winwireblr\adminsharepoint;	

• Click on Managed Metadata Service link highlighted red colour in above screen to create new term group. The following screen would appear

Site Actions 👻 🕎	
SharePoint 2010 Central Adn	ninistration
SEARCH	Manage
TAXONOMY TERM STORE	Available
English	to see in t
🖻 🗞 Managed Metadata Service 🕶	Sample 1
Managed Metadata Service New Group Click to	Sample 1 expand menunare
Managed Metadata Service - New Group Click to	Sample 1 expand menupare UTF-8 CSV

- Click on New Group
- Enter Group Name As "DCPortal"
- Click on "DCPortal" link shown in below screen

SEARCH	Р
TAXONOMY TERM STORE	
English 🔹	
4 🏀 Managed Metadata Service 🗕	
CLASSTermStore	
DCPortal -	
Departm Click to expand menul	
Import rerm Set	
Delete Group	

- Click on Import term set link

SEARCH	PROPERTIES Managed Metadata Service Term set import	□ ×	
TAXONOMY TERM STORE English Managed Metadata Service CLASSTermStore CLASSTermStore COPortal	Select a CSV file from which to import term set data	Browse	iged Metadata Service a sample import file
 DepartmentPortal Dystem 	ок	Cancel	reblr\adminsharepoint;

• Click on Browse.A new widow would appear, select the file "*IDT-Product-Tree-DraftTermStore*" as shown in the below snapshot and click "*Open*" button.



• The following screen would appear. Click on "**OK**" button.

	×
NSE	
1	
:1	l

• Click on OK to create "product tree term set"

18.3.2 How to create the site column for managed metadata term?

- Navigate to the Site Settings page
- Under "Galleries" section, click "Site columns".



• Click on "*Create*" shown below

🚔 Create	
Site Column	Туре
Base Columns	
Append-Only Comments	Multiple lines of text
Categories	Single line of text
End Date	Date and Time
Language	Choice
Start Date	Date and Time
URL	Hyperlink or Picture
Workflow Name	Single line of text

- Enter the Column name as "Product Tree"
- Under "The type of information in this column is" select" Managed Metadata"".
- Under "*Term Set Settings*" section, select the option "*Use a managed term set*", as shown below.

Term Set Settings Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values	 Use a managed term set: Find term sets that include the following terms. Part Part Part Part Part Part Part Part
After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.	 Managed Metadata Service CLASSTermStore DCPortal IDT Product Tree APD-ACS (Libbie Nicholson-Kramer) APD-APC (Libbie Nicholson-Kramer) APD-PCS (Rene Jakubasch, Tom DeLurio)

- Select the "IDT Product Tree" Term set
- Click "OK" to create the column.

18.4 How to create the Folder Content Types?

Here we need to create 2 content types namely "*Doc Control Folder*" and "*Part Number Folder*". The content type creation for these two types of folders is mentioned below.

18.4.1 Doc Control Folder

- Navigate to the Site Settings page
- Under 'Galleries' section, click "Site content types"



• Click on Create shown below

IDT > Site Settings > Site Content Types

Use this page to create and manage content types declared on this site and all parent sites. Conto use on this site and its subsites.

	🖃 Create	
	Site Content Type	Parent
cLib	Business Intelligence	Common Indicator Column

- Enter the content type name as "Doc Control Folder"
- Under "*Parent Content Type*" select" *Select parent content type from option*" as Folder content types and parent content type as Folder.
- Under "Group" section, select the option "DCP Content Types" as shown below.
- Click "*OK*" button to create the Doc Control Folder Content type.

Group Specify a site content type group. Categorizing content types into groups will make it easier for users to find them. Put this site content type into: Existing group: DCP Content Types New group:	Name and Description Type a name and description for this content type. The description will be shown on the new button.	Name: Doc Control Folder Description: Parent Content Type: Select parent content type from: Folder Content Type: Folder Parent Content Type: Folder Create a new folder.
	Group Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.	Put this site content type into: Existing group: DCP Content Types New group:

18.4.2 Part Number Folder

The step for creation of "*Part Number Folder*" is same as that of "*Doc Control Folder*". Just change the name while creating the content type.

18.5 Adding content type to Document Libraries?

- Navigate to **IDT Home** page and click on "**Products**" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "Library" under the "Library Tools" section of Ribbon control.

			Library To	ols
Site Actions 👻 👩 🛛 🛛 🛛 🖻	rowse	Doci	uments	Library
IDT > Prod	ucts 🕨 /	All (Docum	ents 🗸
IDT				
Libraries		ID	Туре	Name
Site Pages Shared Documents	1	8	R	Test2
Products	-			
	- A	dd n	ew item	

- Now in Settings Section, click on List Settings
- Under Content Types section. Click on Add from existing content types shown as below screen.

Content Types		
This document library is configured t item, in addition to its policies, workf	o allow multiple content types. Use content types lows, or other behavior. The following content typ	to specify the information you want to display about a ses are currently available in this library:
Content Type	Visible on New Button	Default Content Type
Marketing ContentType	~	~
Doc Control Folder	~	
Part Number Folder		

• Under select content types options select as "DCP Content Types" as show below

Select Content Types Select from the list of available site content	Select site content types from: DCP Content Types		
types to add them to this list.	Available Site Content Types:		Content types to add:
	Doc Control Folder	Add >	
		< Remove	

• Select "*Doc Control Folder*" content type from Available site Content types and Click on Add Button.

Select Content Types	Select site content types from:	
pes to add them to this list.	Add >	Content types to add; Doc Control Folder
	Description: None Group: DCP Content Types	
		OK Cancel

• Click on "*OK*" button. "*Doc Control Folder*" content type will add to product document library.

18.6 How to add the "Business Unit" to "Doc Control Folder" content type?

- Navigate to **IDT Home** page and click on "*Products*" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "Library" under the "Library Tools" section of Ribbon control.

Site Actions 👻 🔡 Brows	se Doc	Library To uments	Library
IDT > Product IDT List Instance	s ► All I	Docum	ents -
Libraries Site Pages Shared Documents	□ ID 8	Type	Name Test2
Products	🖨 Add r	new item	

- Now in Settings Section, click on List Settings
- Under Content Types section. Click on "*Doc Control Folder*" content type as shown below.

This document library is configured to	allow multiple content types. Use content types	to specify the information you want to display about ar
item, in addition to its policies, workf	ows, or other behavior. The following content typ	bes are currently available in this library:
Content Type	Visible on New Button	Default Content Type
Marketing ContentType	~	~
Doc Control Folder	~	
Part Number Folder	~	
Add from existing site content types		
Change new button order and defaul	t content type	

• The following screen would appear

	mation		
Name: Doc Control	Folder		
Description: Use this con	tent type to create folders inside Products docun	nent library	
Parent: Doc Control	Folder		
Settings			
Name and description			
Advanced settings			
Workflow settings			
Delete this content type			
Information management	: policy settings		
Columns			
Name	Туре	Status	Source
ïtle	Single line of text	Hidden	Item
lame	File	Required	Folder
	Choice	Required	Doc Control Folder
Business Unit			
Business Unit	list columns		

• Under columns section click on Add from existing site or list columns. The following screen would appear

Select Columns	Select columns from:		
Select from the list of available columns to add them to this	List Columns	•	
ontent type.	Available columns:	Columns t	o add:
	Business Unit		
	Generic ID Generic ID Is Public NexPrise_Reference_ID Product Line Product Tree Revision Date Short Description Start Publish Date Stop Publish Date	Add > < Remove	
	Column Description: None Group: List Columns		
		ОК	Cancel

 Under Available columns select the "Business Unit" and click on Add button. The following screen would appear.

Select Columns	Select columns from:		
Select from the list of available columns to add them to this	List Columns	•	
content type.	Available columns:		Columns to add:
	Document Type Generic ID Is Public NexPrise_Reference_ID Product Line Product Tree Revision Date Short Description Start Publish Date Stop Publish Date Column Description: None Group: List Columns	Add > < Remove	Business Unit
		ОК	Cancel

 Click on "OK" button. "Business Unit" column would be added to "Doc Control Folder".

18.7 How to Create the Folder view?

- Navigate to **IDT Home** page and click on "*Products*" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "Library" under the "Library Tools" section of Ribbon control.



• Now in "*Manage Views*" section, click on "*Create View*" section.



• After clicking the "Create View", the following screen would appear.

Choose a view format	
Standard View View data on a Web page. You can choose from a list of display styles.	Datasheet View View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.
Calendar View View data as a daily, weekly, or monthly calendar.	Gantt View View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.
	Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.
Start from an existing view	
All Documents	

• Click on "Standard View". The following screen would appear.

Audience View Audience: Select the option that represents the intended audience for this view. Create a Personal View Personal View Personal views are intended for your use only. Cloumns Create a Public View Public views can be visited by anyone using the site. Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box. Display Column Name Position from Left Position Form Left Position from Left Posit Position from Left	Name Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.	View Nam Folder V Make th (Applies	e: iew is the default view to public views only)	
Columns Select or clear the check box next to each column you want to show or hide in this riew of this page. To specify the order of the columns, select a number in the Position from left box. Display Column Name Position from Left Position from Left Type (icon linked to document) 1 Image: Select a select a select a number in the Position from left box. Name (linked to document) 1 1 Image: Select a select a number in the Position from left box. Name (linked to document) 1 1 Image: Select a number in the Position from left box. Select a number in the Position from Left to document with edit menu) 1 1 Image: Select a number in the Position from left box. Select to document with edit menu) 1 1 Image: Select a number in the Position from left box. Select to document with edit menu) 1 1 Image: Select a number in the Position from left box. Select to document with edit menu) 1 1 Image: Select a number in the Position from left box. Select to document with edit menu) 1 1 Image: Select a number in the Position from left box. Select to document with edit menu) 3 1 Image: Select a number in the Position from left box. Select to document with edit menu) 3 1 Image: Select a number in the	Audience Select the option that represents the intended audience for this view.	View Audi C Crea Perso Crea Publio	ence: te a Personal View onal views are intended for your use on te a Public View c views can be visited by anyone using	ly. the site.
Item Child Count 5 ▪	Columns Select or clear the check box next to each column you want to show or hide in this riew of this page. To specify the order of the columns, select a number in the Position from left box.	Display 모 모 모 모 모 모	Column Name Type (icon linked to document) Name (linked to document with edit menu) Business Unit Product Tree Item Child Count	Position from Left

- Enter the view name as "Folder View" and select the check Box "make this the default view option."
- Under Columns section select the Type, Name, Business Unit, Product Tree, Item child Count columns
- Under "Folder Section" select" Show Items inside Folders" option and "In all folder" as shown below screen shot.

Specify whether to pavigate through folders to view items, or to view all items at	
once.	Colors or Elat
	• Show items inside folders
	C Show all items without folders
	Show this view:
	In all folders
	C In the top-level folder
	C In folders of content type: Doc Control Folder 💌
D Item Limit	
D Mobile	
	OK Cancel

• Click on "*OK*" to create the Folder view in "*Product*" document library.

18.8 How to update the Options in Choice Columns?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar).
- Under the Library Tools tab, in Ribbon control (as shown in fig.), Click on Library tab.
- From ribbon tab click on "*Library settings*" (highlighted in red).

ite Actions + 対	Browse	Documents	Library											Syst
tandard View Format	New Row	Show Task Pa Show Totals Refresh Data Datasheet	ine Create View	Modify View - Create Column Navigate Up Manage V	Current View: Folder View	E-mail a Link Sha	Alert I Me + F	RSS	Sync to SharePoint Workspace	Connect to Office +	Connect to Outlook	Form Web Parts -	Edit Library New Quick mize Library	Library Settings
ibraries		10	Туре	Name			ŧ	Busines	s Unit		Product Tree		Item Child Cou	int
roducts				APD Busin	ess Unit		0	COM					2	
				CBU Busin	ess Unit		3	NetCom					0	
				ECD Busin	ess Unit		1	/DO					1	
iche			E	Testi BHO									0	
asks		٠	Add new iter	n										

- A new settings page will appear, scroll down to "*Columns*" section where we'll have all the fields present in our Document Library.
- Click on the Choice field (for which we want to edit the options). In this e.g. we are editing the "*Business Unit*" field.

A column stores information about ea optional for a column, are now specifi	ch document in the document library. Because th ed by the content type of the document. The follo	is document library allows multiple content types, some colun owing columns are currently available in this document library
Column (click to edit)	Туре	Used in
Business Unit	Choice	Marketing ContentType, Doc Control Folder
Document Type	Choice	Marketing ContentType
Generic ID	Single line of text	Marketing ContentType
Is Public	Single line of text	Marketing ContentType
MMProductTree	Managed Metadata	Marketing ContentType, Part Number Folder
NexPrise_Reference_ID	Number	Marketing ContentType
Product Line	Choice	Marketing ContentType
Product Tree	Managed Metadata	Marketing ContentType
Revision Date	Date and Time	Marketing ContentType

- After Click of the column, a new window would appear showing the "*Business Unit*" choice values.
- Enter the new choice values (in new line) and click on "**OK**" button to save the values

Enforce unique values: Yes No 	
Type each choice on a separate line: COM NetCom VDO	
Display choices using:	
 Checkboxes (allow multiple selections) Allow 'Fill-in' choices: Yes No No 	
Default value: Choice Calculated Value	
	al

- New choice would now appear in "*Business Unit*" field.
- Since this business unit has some dependency for other functionalities as well, we need to make sure that as soon as we update the metadata in "*Business Unit*" field, we create a record in "*BusinessUnit*" and "*ProductLine*" lists as well (Method mentioned in previous section could be used for inserting the record in this list).
- Here are the list of Fields (Choice fields) and associated Lists which we need to update as soon as we update the data in those choice columns.

Choice Columns Fields	Associated Lists to be Updated
Business Unit	BusinessUnit, ProductLine
Document Type	DocType
Language	LanguageType

18.9 How to create Views for a Document Library?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to create view.
- Under the Library Tools tab, in Ribbon control (as shown in fig.), Click on Library tab.
- From ribbon tab click on "*Create View*" (highlighted in red).

Site Actions 🕶 😏 🛛	Browse	Library Too Documents	ols Library		
Standard View	New Row	Create View	Current View: Folder View Current Page	🚖 E-mail a Link ☞ Alert Me + ऒ RSS Feed	Sync to SharePoint Connect to Office +
View Format	Datasheet	м	anage Views	Share & Track	Connect & Export
Libraries		IDT > Produ	nce		
Products		🔲 Туре	Name	м	IMProductTree
			APD Business Unit		
Links			CBU Business Unit		
LISTS	_	_			

- After click of "*Create View*" icon, a new window would appear, as shown in below figure, providing users with different template of views available for creation.
- Select the template, appropriate for the requirement (in our case we are using "*Standard View*" template, as shown in fig).

to this page to select the type of view you want to create for your	uutu.	
hoose a view format		
Standard View View data on a Web page Visplay styles.	Q	Datasheet View View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.
Calendar View View data as a daily, weekly, or monthly calendar.		Gantt View View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.
	*	Custom View in SharePoint Designer Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.

- On click of "*Standard View*" icon, a new window would appear (as shown in below fig.), asking users for the details.
- Enter the appropriate in the "*Name*" section.
- In the "*Audience*" section, select the radio button "*Create Public View*", so that other users can also see the data using this view.
- From the "*Columns*" section, select the fields (by checking the checkbox present before a field), which we want, to be a part of this view.
- We can also set the positions of the fields by selecting the display order from "Position from Left" column.

- If we scroll further down, we'll see "*Filter*" section (shown below in second fig.), where we can select the filter for the view, i.e., only those records would appear which will satisfy the filter criteria.
- More filters could be added by clicking "Show More Columns..." link (highlighted below in red).
- Click on "**OK**" button, present on top as well as bottom of the page.
- After this our view would be created.
- This new view would appear when we click on the document library, where we have created the view, on "*Library*" section of "*Library tools*", under "*Managed View*" section (as shown in third fig.).

IDT > Products			
se this page to create a view of this document library.		ок]	Cancel
Name Type a name for this view of the document library. Make the name descriptive, such as Sorted by Author", so that site visitors will know what to expect when they click this link.	View Nam Audio	e: Solutions his the default view s to public views only)	
Audience	View Audi © Crea Perso © Crea Publi	ence: te a Personal View onal views are intended te a Public View c views can be visited b	for your use only. y anyon using the site.
3 Columns			
elect or dear the check box next to each column you want to show or hide in this view of his page. To specify the order of the columns, select a number in the Position from eft box.	Display	Column Name Type (icon linked to document) Name (linked to	Position from Left
		document with edit menu)	2 .
	1991	mmroductfree	

G Filter

Show all of the items in this view, or display a subset of the items by using 0 Show all items in this view filters. To filter on a column based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed Show items only when the following is true: columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. Learn about filtering Show the items when column items. MMProductTree (Indexed) is equal to . Touch Controller with Integrated LED Di O And Or When column MMProductTree (Indexed) is equal to Touch Controller Show More Column

	Create View Mar Folder View		il a Link Me - I ick	S. to	t to	Edit Libra	
Create View				Sync to SharePoint Connect Workspace Office			
Mar				Connect & Export		Customize	
IDT > Product	Public						
IDT List Instanc	Audio Solutions						
Туре	 Type Multi-Port Memories Power Management Solutions Touch Products Other Configure Views for This Location Tsi721 AN 20110818 Set 		MMProductTree		Bu	Business Unit	
					AP		
					CBU		
						ECD	
			Mobile Multimedia Interconnect		APD		

18.10 How to insert the values into a List?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in browser.
- Click on the List name, present on left hand side of the site (also called left navigation bar), where we need to insert the values (shown in fig).
- Now click on "Add new item", present on the middle-right area of the site (shown in fig.)

Site Actions + DCPWFList + All Items -							
IDT Home							
Libraries Documents Products	BU There are no items to show Add new item	DocumentType in this view of the "DCPWFList" list. To add a new item, dick "New".	DocumentApprover				
Lists Tasks DCPWFList		•					
All Site Content							

- Based on the fields present in the list, user would be prompted to enter the values. Please enter the correct values in the different columns (shown in fig.).
 - If the list contains any field which requires us to enter the users' details, then we need to validate the user after entering the value. For validating the user, please click on the icon, just beside the user text box (shown in fig.). If user is a valid user, then name will automatically change to display name.

dit							
e Cancel	Paste	Attach File	ABC Spelling				
Commit	Clipboard	Actions	Spelling				
BU *		VDO					
ocumentTyp	e *	Applica	ation Note	/Technical Paper			
DocumentApprover *		v.singh					

Now click "Save" button to

save the values.

Edit Edit Save Cancel Paste Copy Commit Clipboard Actions Spelling BU * VDO DocumentType * Application Note/Technical Paper DocumentApprover * Vineet Singh ; Save Cancel	DCPWFList	- New Item					□ ×
Save Cancel Paste Copy Paste Copy Attach File Spelling	Edit		_				
Commit Clipboard Actions Spelling BU * VDO DocumentType * Application Note/Technical Paper DocumentApprover * Vineet Singh ;	Save Cancel	Paste & Cut	Attach File	Spelling			
BU * VDO DocumentType * Application Note/Technical Paper DocumentApprover * Vineet Singh ; Save Cancel	Commit	Clipboard	Actions	Spelling			
DocumentType * Application Note/Technical Paper DocumentApprover * Vineet Singh ; Save Cancel	BU *		VDO				
DocumentApprover * Vineet Singh ;	DocumentType	e *	Applic	ation Note/Te	chnical Paper		
Save Cancel	DocumentApprover *		Vineet Singh ;				2
					Save	Ca	incel

inserted to the list, as shown in the fig.

A new record would be
ite Actions 👻 附 Bro	List Tools wse Items List		
IDT → DCPW	FList + All Items -		
IDT Home			Search this site
Libraries	🗐 🥘 BU	DocumentType	DocumentApprover
Documents		 Application Note/Technical Paper 	Vineet Singh
roducts	Add new item		
ists			
asks			
CPWFList			
Recycle Bin			
A HIGH CONTRACT			

NOTE: While entering the values, the fields marked in red * are mandatory and cannot be left blank.

18.11 How to Export the List data to an Excel?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the List name, present on left hand side of the site (also called left navigation bar), from where we need to export the data to excel (DCPWFList, in this case).
- Under the List Tools tab, in Ribbon control (as shown in fig.), Click on List tab.
- Now click on "*Export to Excel*" icon from the ribbon control.

Site Actions - 😰 Brow Standard View Format Data	sheet	E-mail a Alert Link Me - Feed Share & Track	Sync to SharePoint Connect to Export to Outloor Connect & Export to Connect & Export & Connect & Export to Connect & Export to	7 Create Visio Diagram Open with Access Open Schedule
Libraries Documents Products	Title Test1 © MCW Test2 © MCW	DocumentType DocType1 DocType2		DocumentApprovers Vineet Singh Chandrashekar Reddy
Lists Tasks DCPWFList	Add new item			

- A new window will appear prompting user to save the data, as shown in the below fig.
- Click on "<u>Save</u>" button to save the data.

o you	want to op	en or save this file?
	Name:	owssvr.iqy
-30	Type:	Microsoft Office Excel Web Query File
	From:	122.181.132.122
Al <u>w</u> ays	ask before	Open Save Cancel opening this type of file
2	While files fr	om the Internet can be useful, some files can potentially omputer. If you do not trust the source, do not open or What's the risk?

- A new window would appear prompting user for the path, where document has to be saved.
- Navigate to the path and save the file as ".iqy" extension only.

Desktop		← ++ Search Desk	top	Q
Organize 👻 New folder				Ø
★ Favorites ■ Desktop ▶ Downloads > Recent Places	Libraries System Folder vineet System Folder			
Libraries Documents Music Pictures Videos	System Folder Network System Folder			
r Computer -	IDTCustomApprovalWF			
File <u>n</u> ame: <mark>owssyridy</mark> Save as <u>type</u> : Microsoft Office	Excel We Folders: IDTCustomA Files: manifest.xml	1 10:51 AM pprovalWFListInstances		•
Hide Folders		Save	Cance	el

- Now, navigate to the path where we have saved the file.
- Open on the saved file.
- It'll prompt the user for security threat (shown in fig below).
- Ignore the message and click on "*Enable*" button to continue.



• Now this file would open in Excel displaying the list data in it.

18.12 Alert Me:

18.12.1 What is "Alert Me"?

"Alert Me" provides a means of automatic communication to users as to what is happening in a Document Library/List using SharePoint via email/SMS alerts. "Alert Me", if set, automatically sends an email/SMS, to the users, for whom this alert is configured.

18.12.2 How to set Alerts for Documents/Document Library?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to Set the Alerts (Products Document Library, in this case).
- Under the Library Tools tab, in Ribbon control (as shown in fig.), Click on either Documents (If we want to set alert for a particular document) or Library (If we want to set alert for whole document library). In this case, we are setting the alert for a document (Setting alert for Document Library also involves the same process).

New Upload Document - Document - Fo	ew Publish to Delete from IDT.com IDT.com	Edit Document Discard Check Out	k Out Properties	Edit Properties X Delet Manage	on History ment Permissions te Document	E-mail a Link Share G	Alert Me. Set alert on this document
Libraries	Туре	Name	Business Unit	DCPApprovalWF	Document Typ	e 1	Manage My Alerts
Products		T6/721 AN 20110818	COM		Application Note/Technica:	Paper:	0002. APG
Lists Tasks	Add new	tem				_	

- Click on Documents tab from Ribbon Control.
- Select the Document, by clicking on the checkbox just beside the document.
- From Ribbon Control, Click on "Alert Me" Menu.
- A new popup will appear, now select "*Set Alert on this Document*" and click.

Site Actions + 🐋 Browse 🚺	Library Tools Documents							
New Upload Document + Document + Folder New	Publish to Delete from IDT.com	Edit Document Discard Check Out	view Properties	Edit Properties X Delete Manage	n History nent Permissions e Document	E-mail a Link Share 8	Alert Me +	Download a Copy alert on this document
Libraries	🔲 Туре	Name	Business Unit	DCPApprovalWF	Document Typ	e	😭 Mar	nage My Alerts
Products	I	Test Title Ontw	COM		Application Note/Technical	Paper	0001	APC
		Tsi721_AN_20110818	COM		Application Note/Technical	Paper	0002	APC
Lists Tasks	💠 Add new	item						

- Set the subject for the email, Users, who are suppose to be alerted, SMS/Email alert and rest of the values as shown in fig.
- Click on "*OK*" button to set the alert for the document.

Products: New Text D	OK Cancel
Alert Title Enter the title for this alert. This is included in the subject of the notification sent for this alert.	Products: New Text Document.txt
Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: Vineet Singh ;
Delivery Method Specify how you want the alerts delivered.	Send me alerts by: © E-mail © Text Message (SMS) © Send URL in text message (SMS)
Send Alerts for These Changes Specify whether to filter alerts based on specific riteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: Anything changes Someone else changes a document Someone else changes a document created by me Someone else changes a document last modified by me
When to Send Alerts Specify how frequently you want to be alerted. (mobile alert is only available for mmediately send)	 Send notification immediately Send a daily summary Send a weekly summary Time: Monday = 10:00 PM =
	OK Cancel

18.13 How to email a link?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to send the Document Link.
- Click on the arrow button, present on the right side of the Name field, for the item for which we need to send the link.
- Now take the cursor to "*Send To*" option.
- A new popup will appear, select "*E-mail a Link*" from there (shown in fig.).

Libraries	🕅 Ту	ре	Name	Bus	siness Unit	DCPApproval	IWF	Document Type	Generic ID	Product Line
Products			Test Title ≅™	CO	м			Application Note/Technical Paper	0001	APC
Lists		₽	View Properties Edit Properties Edit in Microsoft Word	co	м			Application Note/Technical Paper	0002	APC
Tasks	🕈 Ado	La La	Check In Discard Check Out	-						
Products		٢	Compliance Details Workflows Alert Me							
Product free			Send To		Other Loca	ation				
		₿ X	Manage Permissions Delete	<u></u>	E-mail a L Create Do	ink ocument Worksp	pace]		
					Download	а Сору				

- A new window will appear prompting user that the link is trying to open the web page link (as shown in fig. below).
- Click on "<u>A</u>llow" Button to continue.

	A website wants to open web content using this program on your computer
	This program will open outside of Protected mode. Internet Explorer's <u>Protected mode</u> helps protect your computer. If you do not trust this website, do not open this program.
	Name: Microsoft Office Outlook Publisher: Microsoft Corporation
	Do not show me the warning for this program again
\odot	Details Don't allow Don't allow

- On press of Allow button, outlook new message window would appear with document link as the body of the message.
- Enter the "To", "cc" and "Subject" values and send the email.

18.14 How to Configure Lists for Nomenclature?

The documents uploaded in Document Libraries automatically follow a nomenclature. Apart from that there are few pre-populated fields based on earlier section (when Business Unit is selected its associated product lines automatically gets prepopulated in next drop down). There are few configuration lists which are used for maintaining all these activities which are

not handled by SharePoint OOB feature. Here are configuration lists which are created for handling such cases:

18.14.1 BusinessUnit List:

This List is used for storing the values in which has to be automatically populated in "Business Unit" column (appears while we were uploading a document). Business Unit List contains a "Title" field which is used for storing all such values.

18.14.2 ProductLine List:

This List is used for storing the mapping between "*Business Unit*" and associated "*Product Lines*". This list contains 2 fields namely "*Title*" and "*BusinessUnit*". The "*Title*" field contains the Product Lines values whereas "*BusinessUnit*" field contains the Business unit value associated with that product line.

18.14.3 DocType List:

This list is used for storing the mapping between "*Document Type*" and "*Abbreviation*" for the document type. This abbreviation is used for file nomenclature. This list contains 2 fields, namely "*DisplayName*" and "*DocTypeCode*". "*DisplayName*" field contains the Document Type name, whereas "*DocTypeCode*" field contains the associated document type abbreviation. As soon as we select a "*Document Type*" from the drop down, a lookup is made into this DocType List, for selected Document Type, and associated abbreviation is taken for Nomenclature.

18.14.4 LanguageType List:

This list is used for storing the mapping between "*Language*" and "*Abbreviation*" for the Language. This abbreviation is used for file nomenclature. This list contains 2 fields, namely "*DisplayName*" and "*Code*". "*DisplayName*" field contains the Language name, whereas "*Code*" field contains the associated Language abbreviation. As soon as we select a "*Language*" from the drop down, a lookup is made into this LanguageType List, for selected Language, and associated abbreviation is taken for Nomenclature.

18.14.5 DCP 000 Information List:

This list is used to store the delegation values. This list contains 4 fields, namely "*task_owner*", "*Delegation Start Time*", "*Delegation End Time*" and "*Delegated_To*". Task_Owner contains the value to whom delegation is to be set. Delegation Start Time and Delegation End Time are the delegation start and end dates respectively. Delegated_To contains the value to whom the tasks are to be delegated.

18.14.6 ISODocumentType List:

This list is used for storing the Document Type values which will be used as metadata in ISO document library. This list contains '*Title*' field that stores the values.

18.14.7 ISODocTypeAcronym List:

This list is used for storing the mapping between "*Document Type*" and "*DocumentTypeAcronym*" for the Language. This abbreviation is used for file nomenclature. This list contains 2 fields, namely "*Title*" and "*ISODocumentType*". "*Title*" field contains the acronym name, whereas "*ISODocumentType*" field contains the associated Document Type. As soon as we select a "*ISODocumentType*" from the drop down, a lookup is made into this List, for selected Document Type, and associated acronyms are taken for Nomenclature.

18.14.8 Hold ISO Tasks List:

This list is used for storing the mapping between "*Title*" and "*Due Date*". The date in this list is used to get the hold items information in the ISO Approval workflow. '*Title*' field stored the id of the task item which was kept on hold and '*Due Date*' contains the value till which date the task was kept on hold.

NOTE: For inserting data into these lists, please refer *section 6.4*. For editing an Item from the list, please refer *section 6.7*.

18.15 How to disable "I like It" and "Tags & Notes"?

- Enter the server, where SharePoint is installed and site is hosted.
- Click on start menu and Navigate to "Start" → "All Programs" → "Microsoft SharePoint 2010 Products" → "SharePoint 2010 Central Administration".
- From Left Navigation bar, select "System Settings" as shown in the fig.
- Now, from right side select "*Manage farm features*" link.

SharePoint 2010	Central Administration + System Settings
Central Administration Application Management System Settings Monitoring Backup and Restore Security Upgrade and Migration General Application Settings Configuration Wizards	Servers Manage servers in this farm Manage services on server E-Mail and Text Messages (SMS) Configure outgoing e-mail settings Configure incoming e-mail settings Configure mobile account Farm Management Configure alternate access mappings Manage farm features Configure alternate access mappings Manage farm features Configure privacy options Configure tross-interval at these statis Enable or disable farm-wide SharePoint functionality

- After clicking on the link, a new window would appear, displaying all the features present for the site.
- From the features list, search for "Social Tags and Note Board Ribbon Controls" feature.
- Click on "Deactivate" button present beside the feature name (as shown in the fig.)
- This will deactivate "I Like It" and "Tags & Notes" link.

Offline Synchronization for External Lists Enables offline synchronization for external lists with Outlook and SharePoint Workspace.	Deactivate
Social Tags and Note Board Ribbon Controls Adds entry points for social tagging and note board commenting to the ribbon user interface.	Deactivate
Spen Checking Enable the Spell Checking in list-item edit forms.	Deactivate
Visio Process Repository	

18.16 How to hide "Make Available to IDT.com" ribbon buttons on Server ribbon control?

To hide IDT ribbon buttons for specific document library used configuration list. Here is the configuration list which is created for handle such cases:

- MakeAvailableConfigList:
 - This list is used to store Names of all the Document Libraries in which
 "Make Available to IDT.com" feature is visible
 - This list has two columns. One is "Library Name" to capture name of the document library and another one is "Required" to capture whether library has "Make Available to IDT.com" feature is visible.
 - If specific document library not required "Make Available to IDT.com" feature. Required column has been set to "NO".
 - Follow fig shows sample data for hide/show the "Make Available to IDT.com" buttons for specific document library.

Home + MakeAvailableConfigList + All Items -						
Libraries	□ 0	LibraryName	Required			
Decuments		Corporate	Yes			
Documents		Packages	Yes			
Products		NPI	No			
Site Pages		Products	Yes			
TestLib						

18.17 How to insert values into "MakeAvailableConfigList" List?

- Enter into the site, by typing the site URL (<u>http://docs.idt.com</u>) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar).
- Under the Library Tools tab, in Ribbon control (as shown in fig.), Click on Library tab.
- From ribbon tab click on "*Library settings*" (highlighted in red).

ite Actions 👻 过	Browse	Documents	Library												-
tandard View Format	New Row	Show Task Show Total Refresh Da Datasheet	Pane Is ta View	Modify View • Create Column Navigate Up Manage V	Current View: Folder View • 4 Current Page »	E-mail a Link Shi	Alert Me +	RSS Feed ck	Sync to SharePoint Workspace	Connect to Office +	Connect to Outlook	Form Web Parts • Cust	Edit Library omize Lit	New Quick Step	Library Settings Pe
Libraries		1	Туре	Name		Business Unit				Product Tree	Item Child Count				
Products Lists Taska				APD Busin	APD Business Unit		COM NetCom				2				
				CBU Business Unit											
			ECD Business Unit			VDO			1						
			Ba	Testi Die				0							
			Add new it	im .											
Tasks		1	Add new it	m											

 A new settings page will appear, Under "General Settings" Click on "MakeAvailableTo IDT.com Settings" link.



- After Click of the column, a new window would appear showing the "*Enable Make Available to IDt.com for this list?*" Radio button values (yes/No).
- Select "Yes" to show "Make Available to IDT.com" feature for that document library (or) Select "No" not to show "Make Available to IDT.com" feature for that document library and click on "Save" button to save the values into "MakeAvailableConfigList"

Document Contro	I Portal				Search this site	agrated Device Tech	GO	Like It
Home Desclusio	Dashasas	Companya	NDT					Tags & Notes
Home Products	Packages	Corporate	NPI					
Home ▶ My Application Page				-				
Libraries	Enable	MakeAvailable To	IDt.com for this list?	(e yes			Спо	
Documents				:	Save	Cancel		
Products								
Site Pages								
_								

- Auto push event handler is attaching with document library when user select "Yes" radio button and click on save button.
- Auto push event handler is detaching with document library when user select "No" radio button and click on save button.

18.18 Assumptions for auto push Event handler

- Event handler will not update anything until unless the document is get published (by using Make available at IDT.com ribbon control).
- Event handler will not update anything for unpublished document.
- Before running the migration tool we need to detach the Event handler for that Document library.
- Below is the matrix for Is Public field (in XML there is no change for Is Public.)

In DCP site- Is Public	Internal IDT status	XML
Null	Null	
Published	Published	Publish
Published (after Update)	Published (after Update)	Update
Not Published	Delete	Delete

- In case of any error, the same would be logged in "*DCPErrorMessageList*" of the site.
- Event handler will get execute only for major versions of the document. It will not get execute for minor versions.