Document Control Portal

User's Learning Guide

Prepared for

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Version 1.0

Prepared by

Revision and Signoff Sheet

Change Record

Date	Author	Version	Change reference
09-Aug-2011	Vineet Kumar Singh	0.1	Initial draft for review/discussion
11-Aug-2011	Vineet Kumar Singh	0.2	Added New **Site Structure** Section. Apart from that made few changes in 4.l section (How to approve/Reject/reassign a document).
21-Aug-2011	Vineet Kumar Singh	0.3	Removed “I Like It” and “Tags & Notes” section and added the way to disable those tags. Edited the 4l section (added steps on how to Approve the rejected documents). Added a section on Workflow and Security.
25-Aug-2011	Vineet Kumar Singh	0.4	Added Nomenclature, Folder structure, Metadata Navigation and Abbreviations and Acronyms Sections and also added section 8f. Changed all the images which were referring to old data. Updated Site structure section.Updated site URL in all the places
26-Aug-2011	Vineet Kumar Singh	0.5	Added “Check-In/Check-Out” section (section 12-i) and added “How to create View section” (section 12-g). Formatted the document.
26-Aug-2011	Chandra	0.6	Rearranged the content as per Ian’s feedback
02-Sep-2011	Vineet Kumar Singh	0.7	Added the topics on “Search”, “Versioning” and “Recycle Bin”.
10-Nov-2011	Vineet Kumar Singh	0.8	Added section 9, Changed diagram in Site structure and folder structure. Added content about Corporate document library and change notification content type. Changed nomenclature.
30-Nov-2011	Vineet Kumar Singh	0.9	Added content on content Type, Security, Configuration Lists.
2-Dec-2011	R I Karun Kumar	1.0	Added Folder Structure, Content Type, Filename Nomenclature, User Groups for NPI Library. Also added the content for Starting workflows manually
28-Dec-2011	Madhu	1.1	Added hiding ribbon buttons, Event handler for auto pushing documents to “make available to IDT.com”
28-Dec-2011	Vineet	1.2	Added PDF conversion feature. Added information on List section
12-June-2011	Murthy	1.3	Section 5.8.2 addresses DCPCR043 Section 5.3.1 addresses DCPCR046

Reviewers

Name	Version	Comments	Date
Chandra	0.3	Reviewed and updated the images	8/22/2011
Ian	0.3	Reviewed and provided feedback	8/22/2011
Chandra	0.4	Reviewed and provided feedback	8/22/2011
Chandra	0.5	Reviewed	8/26/2011
Ian	0.5	Reviewed and provided feedback	8/29/2011

Table of Contents

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.

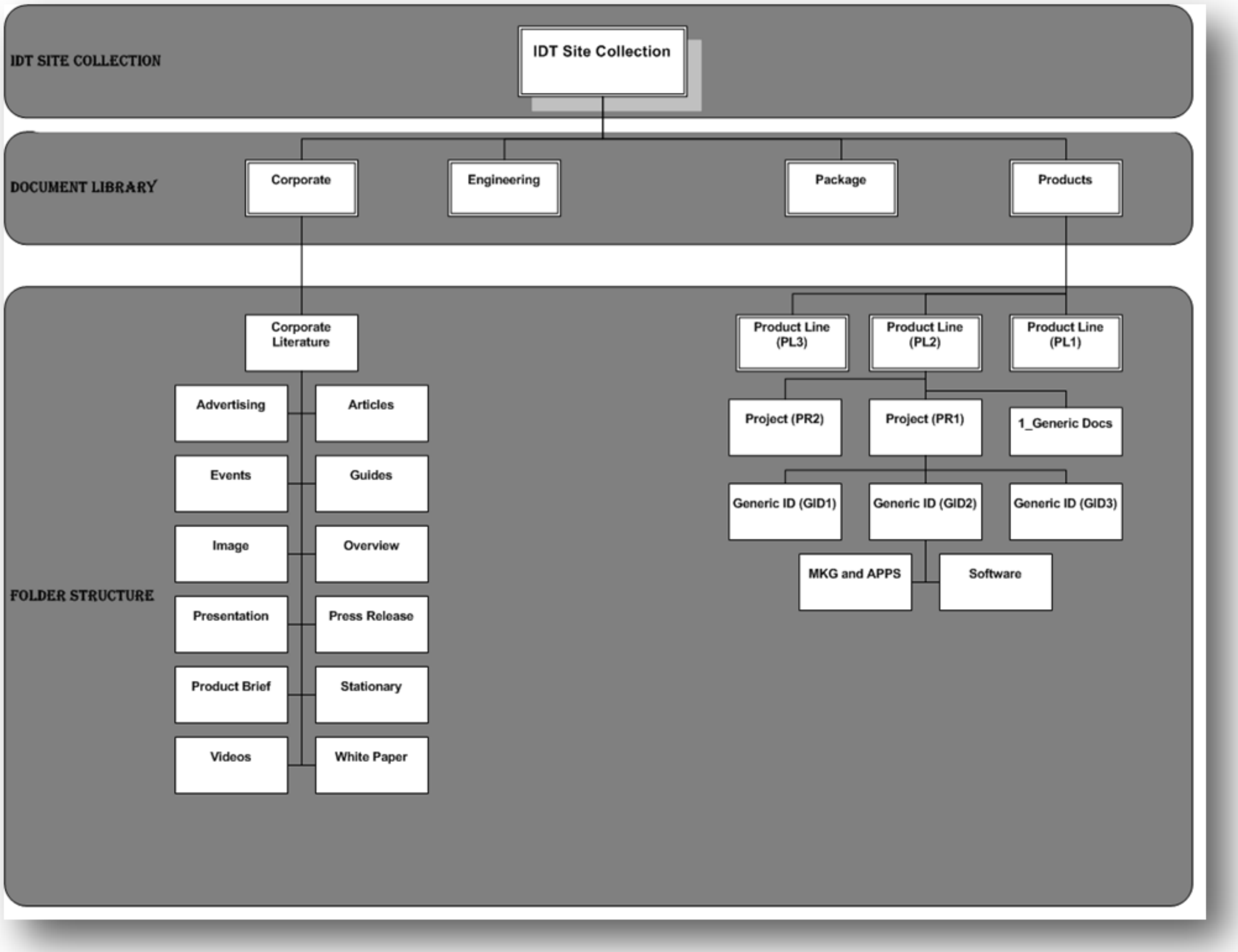


Figure 1: Site & Folder Structure

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:

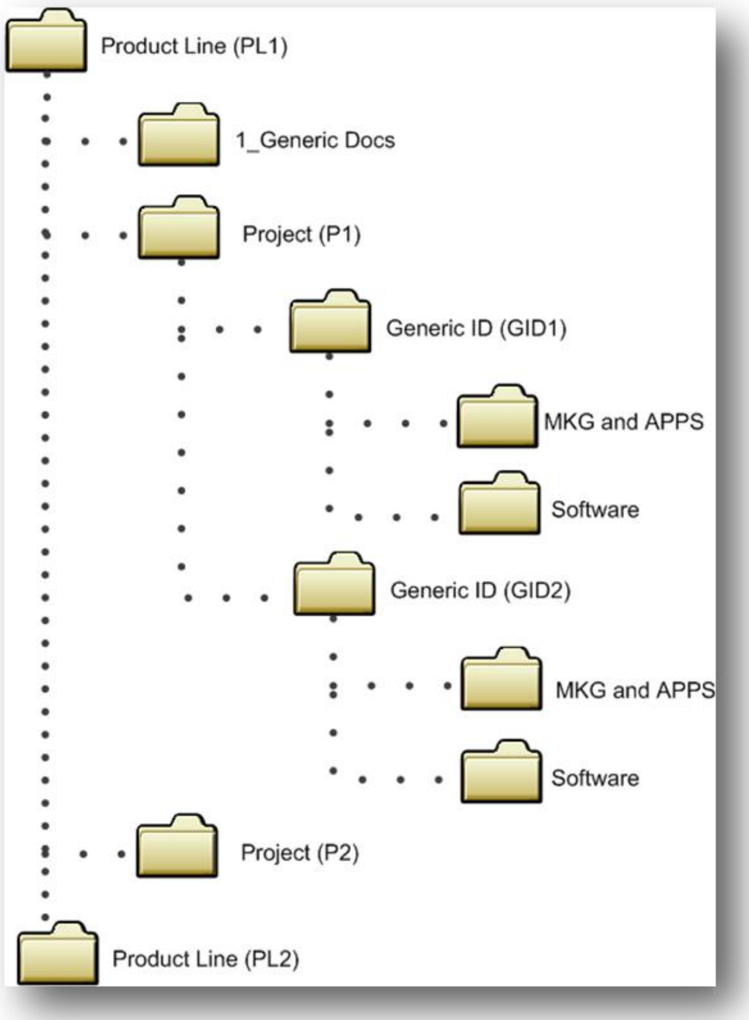


Figure 2: Folder Structure in Products Document Library

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

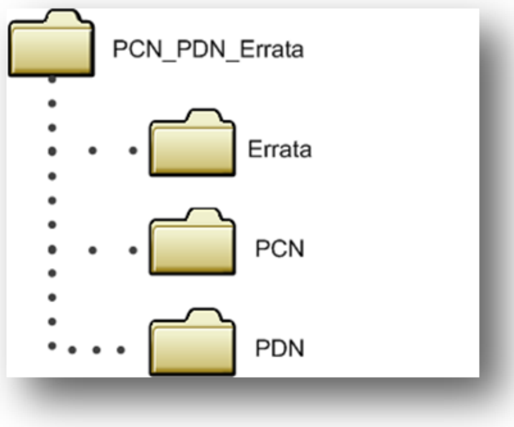
Name	*Type*	*Level/Parent*	*Basis for Folder name and its Location*
Product Line	folder	Root	Under each BU there are multiple Product Lines. A separate sub-folder will be present for each product line under each unique BU.
Project	Sub-Folder	Product Line	Each Product Line will have multiple Projects. 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

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
APC	APD, All Product Lines
PCS	APD, All Product Lines
PPC	APD, All Product Lines
AUI	APD, All Product Lines
SES	CBU, All Product Lines
TCS	CMD, All Product Lines
TPC	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

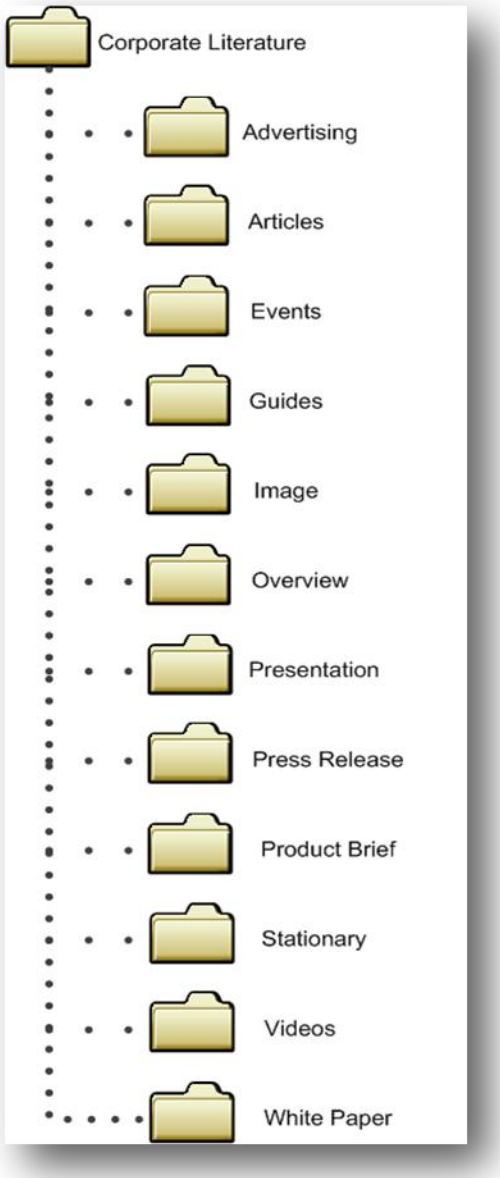
4.2.1.2 Change Notification Content Type:



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

Name	*Type*	*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-Folder	PCN_PDN_Errata	PCN_PDN_Errata folder, will in turn contains PCN folder inside it. All the documents of "*Document Type*" PCN will be uploaded into this folder.
PDN	Sub-Folder	PCN_PDN_Errata	PCN_PDN_Errata folder, will in turn contains PDN folder inside it. All the documents of "*Document Type*" PDN will be uploaded into this folder.
Errata	Sub-Folder	PCN_PDN_Errata	PCN_PDN_Errata folder, will in turn contains Errata 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	*Type*	*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 "*Document Type*" 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 "*Document Type*" 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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 “*Document Type*” 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	*Type*	*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	*Type*	*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 Supervisor, ISO Test Program, ISO Training Notification
PDAEs	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	Quality_Readers, Quality_Members, Quality_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA 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-Safety_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA 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	Statistical-Process-Control_Readers, Statistical-Process-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 Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO Training Notification
Specs	Spec_Readers, Spec_Members, Spec_Owners, ISO DC 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, ISO Supervisor, ISO Test Program, ISO Training 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-Tests_Owners, ISO DC Contact, ISO Dynamic Reviewer, ISO QA Reviewer, ISO Supervisor, ISO Test Program, ISO 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	*Type*	*Level/Parent*	*Basis for Folder name and its Location*
1_Document Template	Folder	Root	At the root level, of NPI Document Library, we will have this folder
ACS	Folder	Root	At the root level, of NPI Document Library, we will have this folder
APC	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	Folder	Root	At the root level, of NPI Document Library, we will have this folder

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
SFC	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
TPC	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
PCS	NPI_APD
PPC	NPI_APD
AUI	NPI_APD
TPC	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

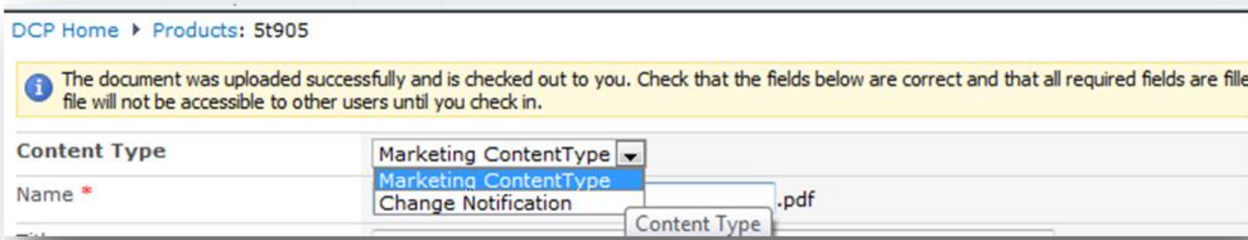
5.1 Filename Nomenclature:

5.1.1 Products Document Library:

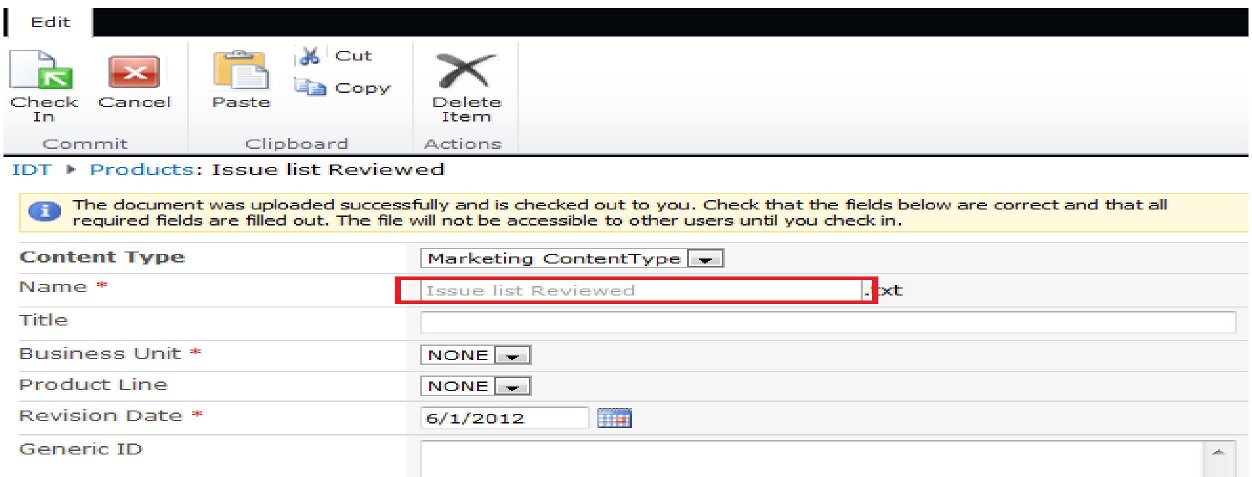
Products library has two content types associated with it

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.



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



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	MOB
Model – HSPICE	MOH
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: ***<Identifier>_<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	PPT
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: ***<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***":

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	CPT
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	TOC
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

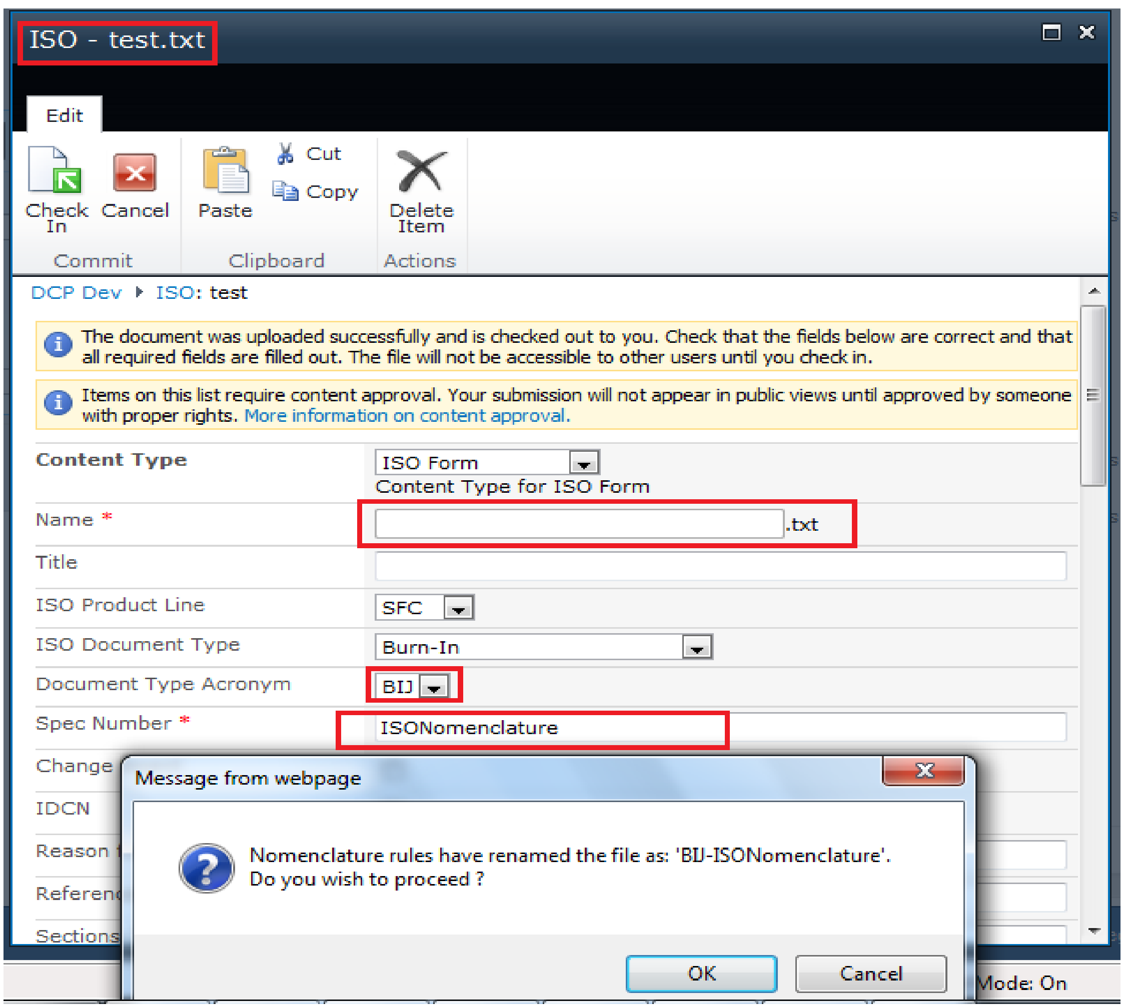
Document filename for any document uploaded to DCP ISO Document Library, will follow the below mentioned nomenclature: *<DocumentTypeAcronym>-<Spec Number>.*

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-AAAA***" or "***BIJ-12AA***" etc

- 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
MPH	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
PCA	Production Control
PCG	Production Control

PCH	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
WOJ	Runcards
WOS	Runcards
WOQ	Runcards
ICS	ICS
STG	STG Spec's
TPG	Test Prog's

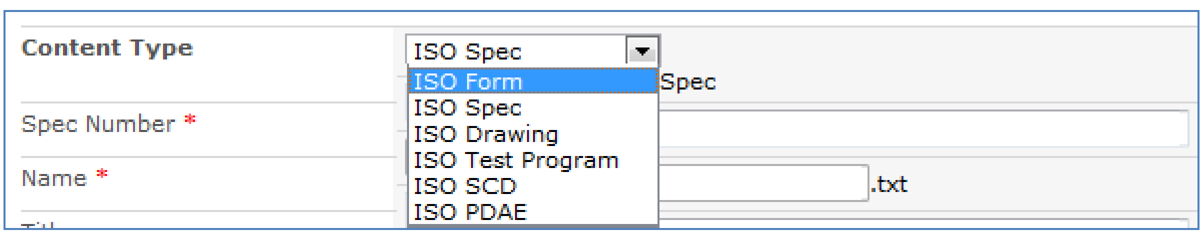
<u>Validations</u>:

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 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 (http://docs.idt.com) 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.)

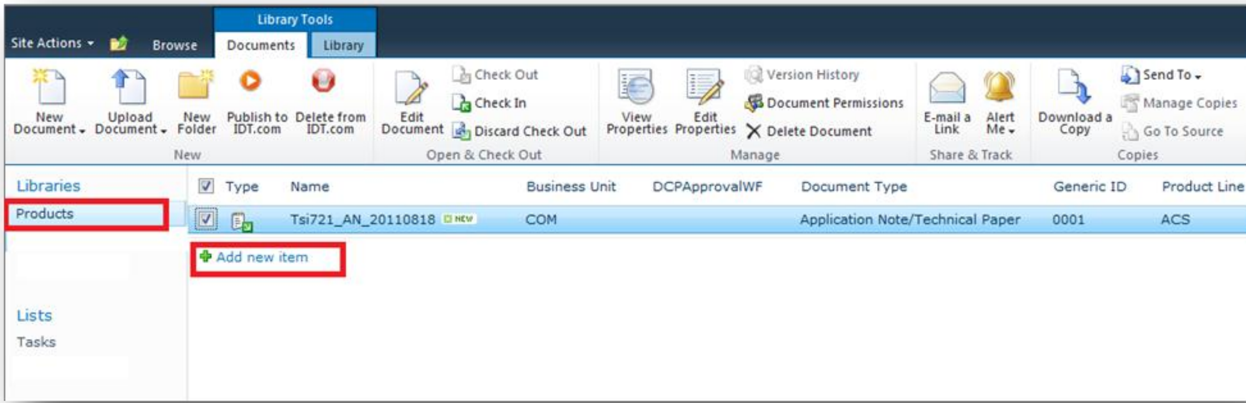


Figure 3: Products Document Library

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

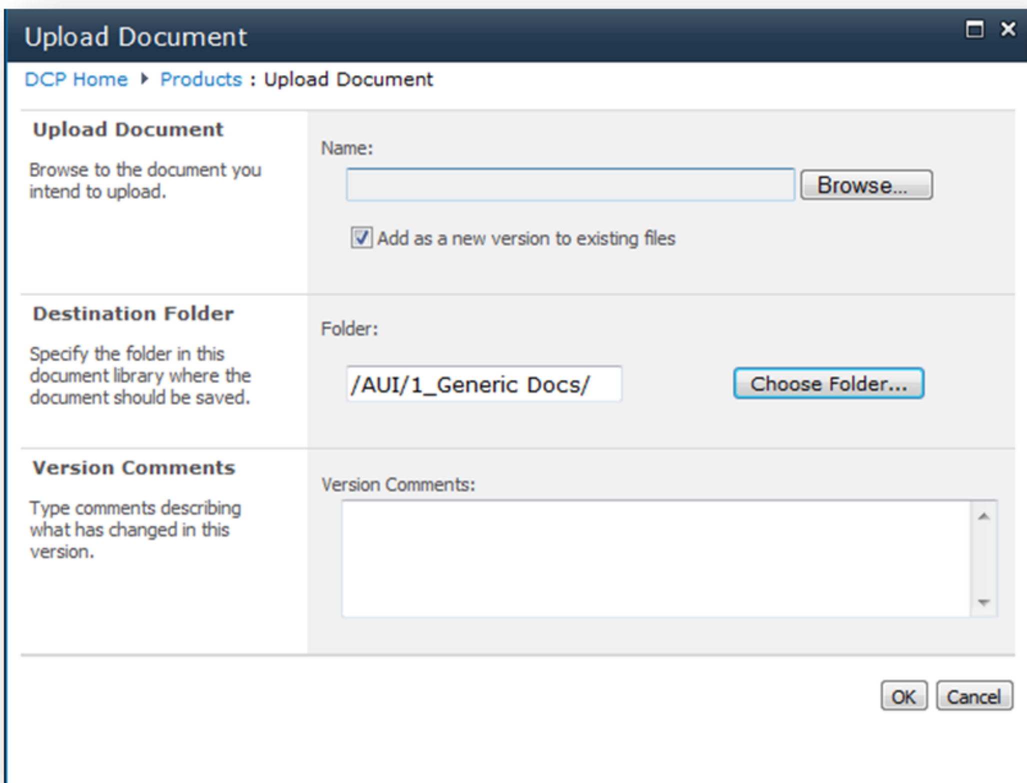


Figure 4: Document Upload screen

- 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.

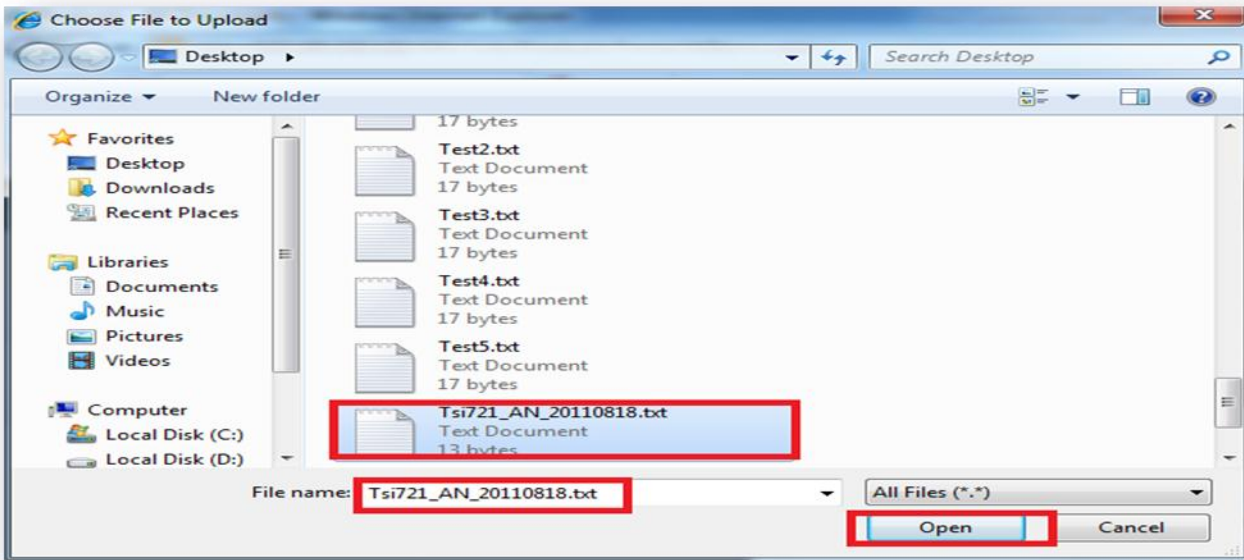


Figure 5: Selecting a document to upload

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

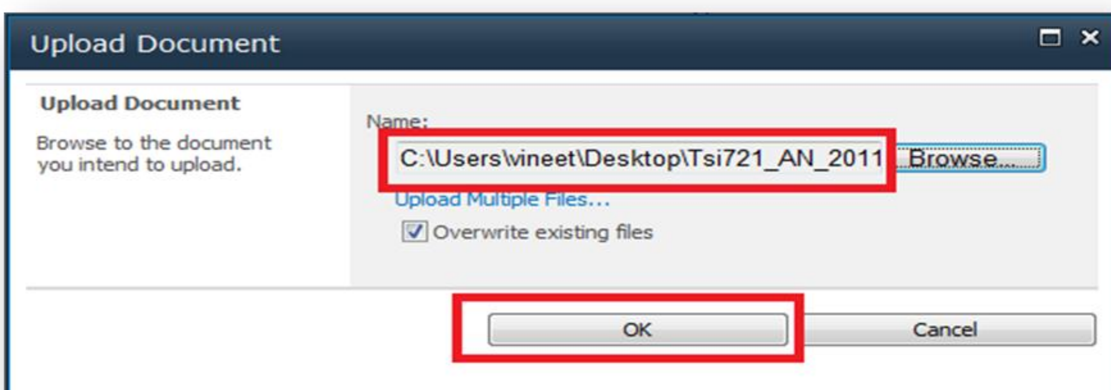


Figure 6: Document upload screen with selected document.

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

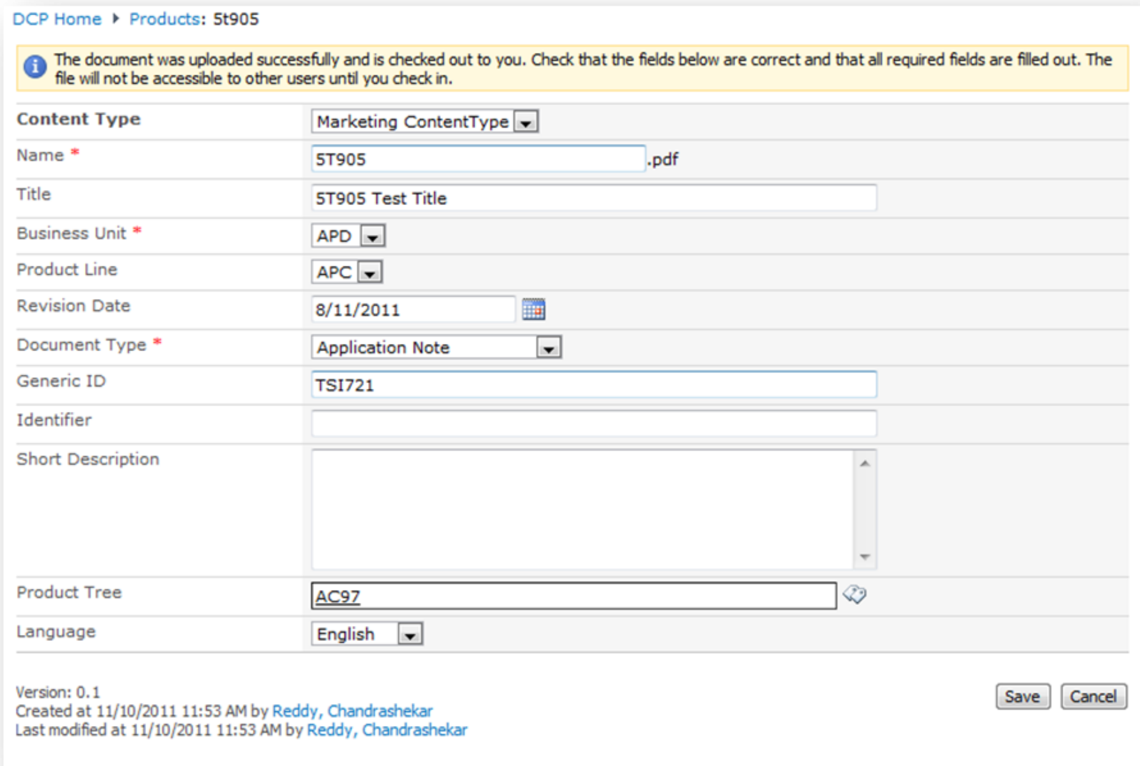
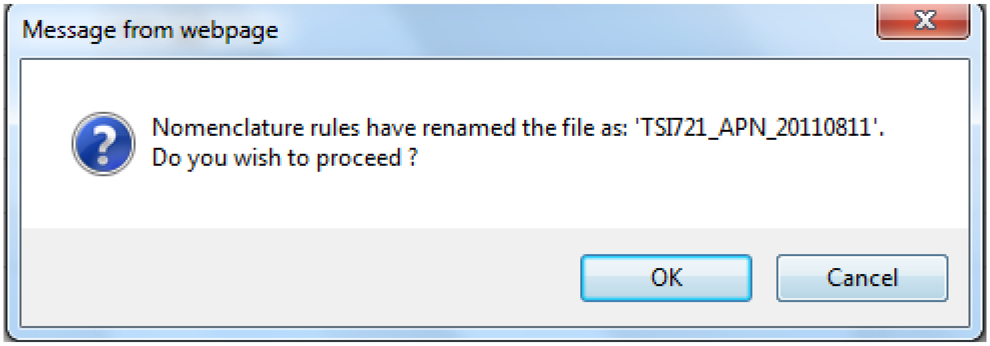


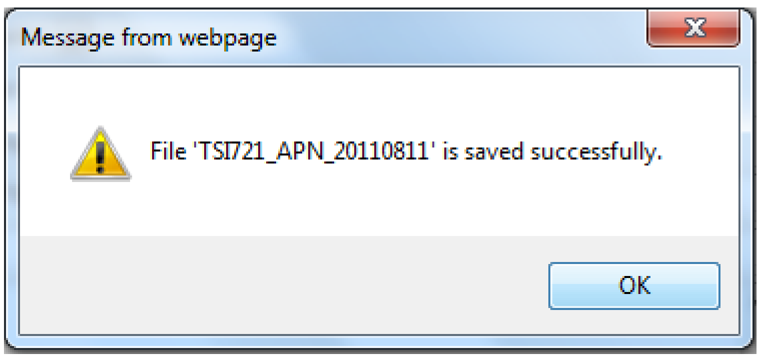
Figure 7: Document edit properties screen

Field Name	Data Type	Purpose	Required/Optional
Name	Single Line of Text	Used for string the Name of the 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.



- 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.

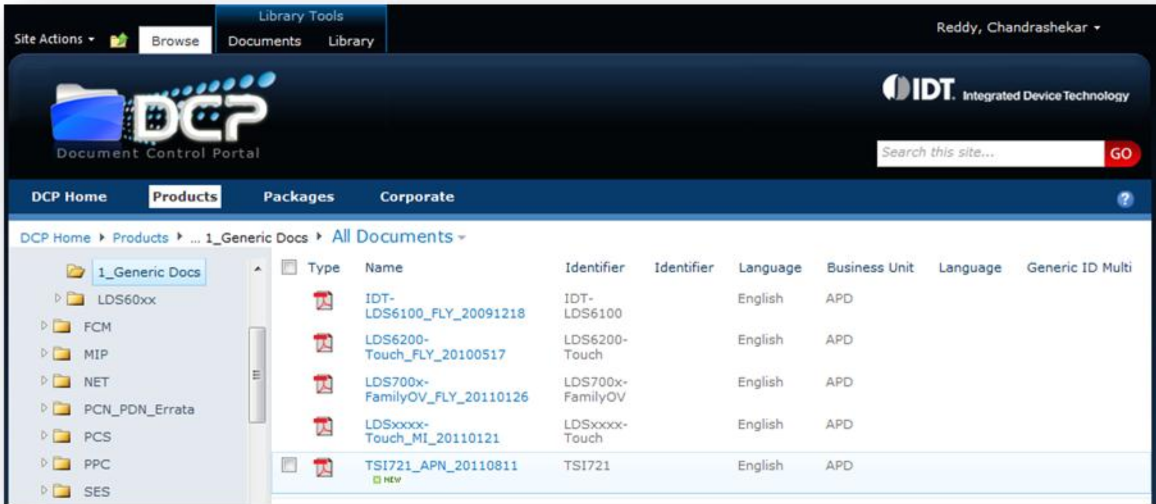


Figure 8: Products Document Library with uploaded document

- 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 (http://docs.idt.com) 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.

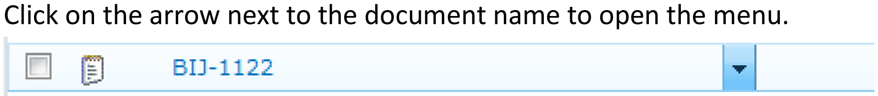


Figure 9 Down arrow next to filename

- Click on "Replace Document" option

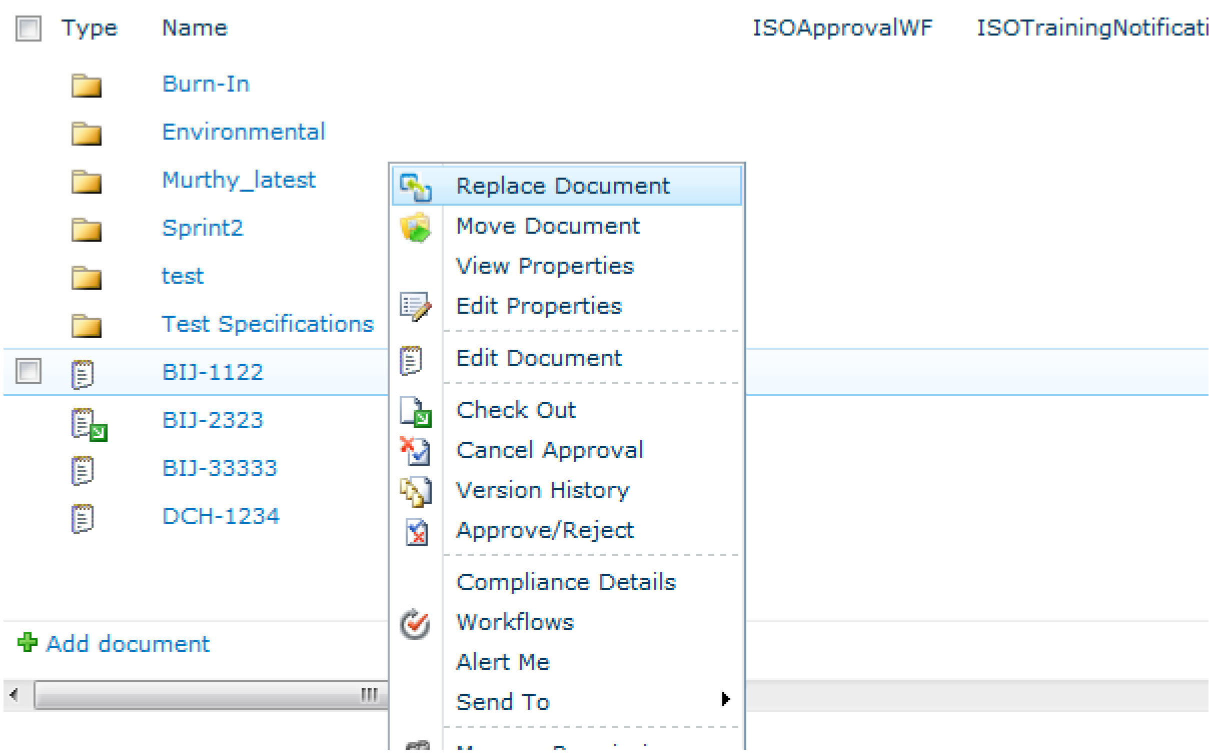


Figure 10 Edit Control Block - drop down menu

- 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.

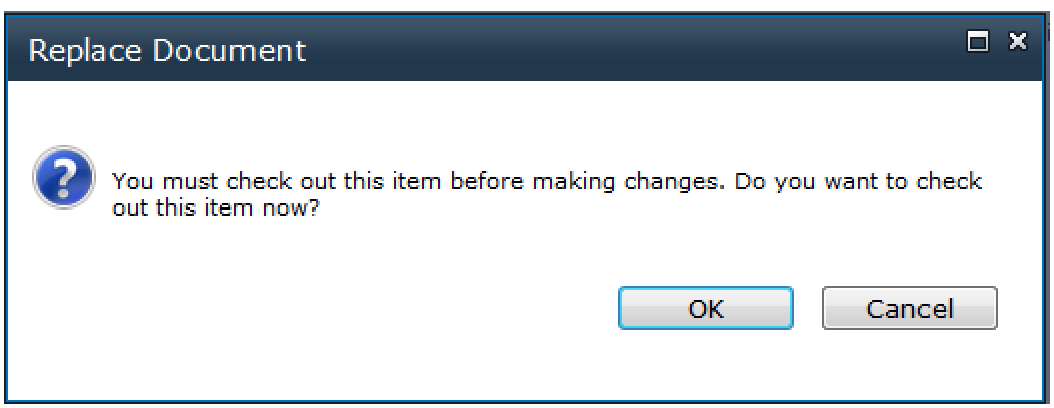


Figure 11 System Prompting with a message to check out the document before replacing

- 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.

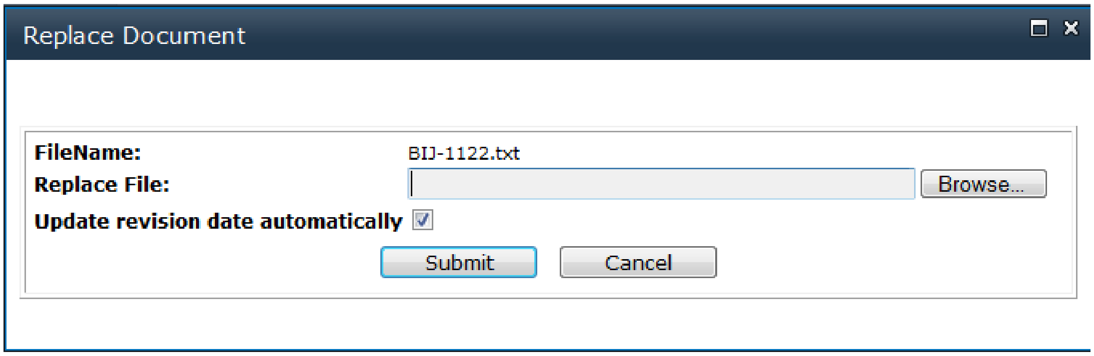


Figure 12: Replace document window

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

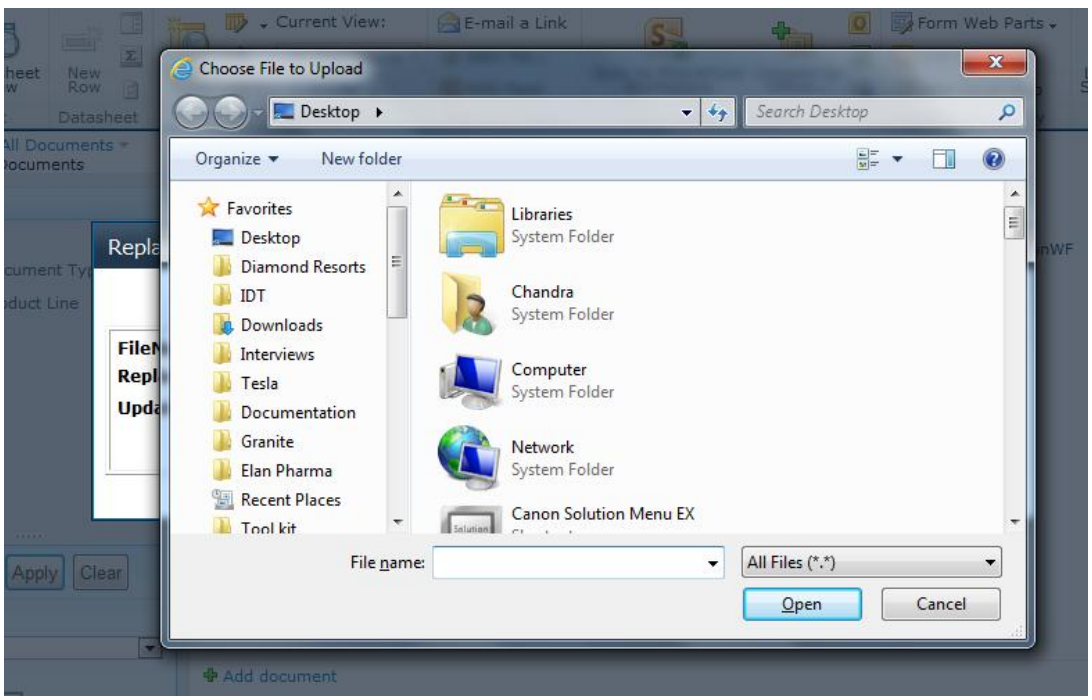
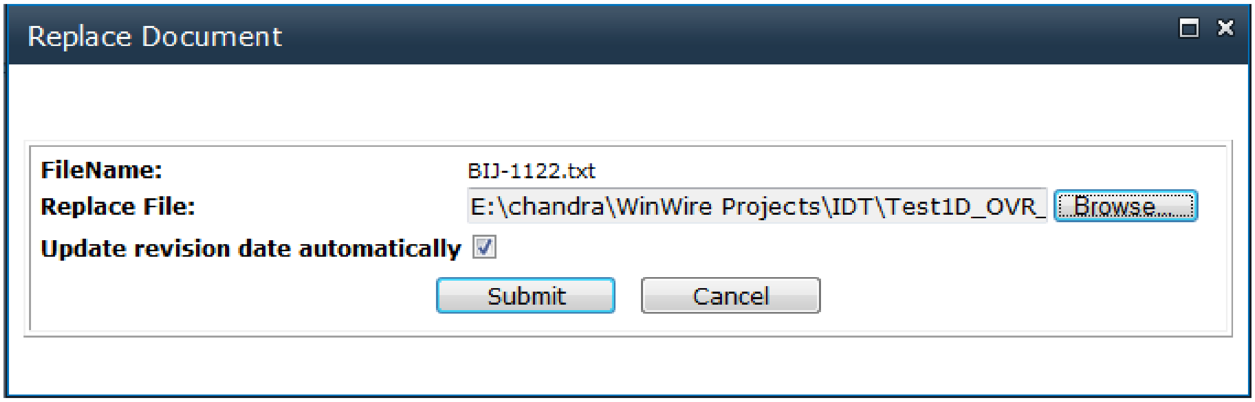
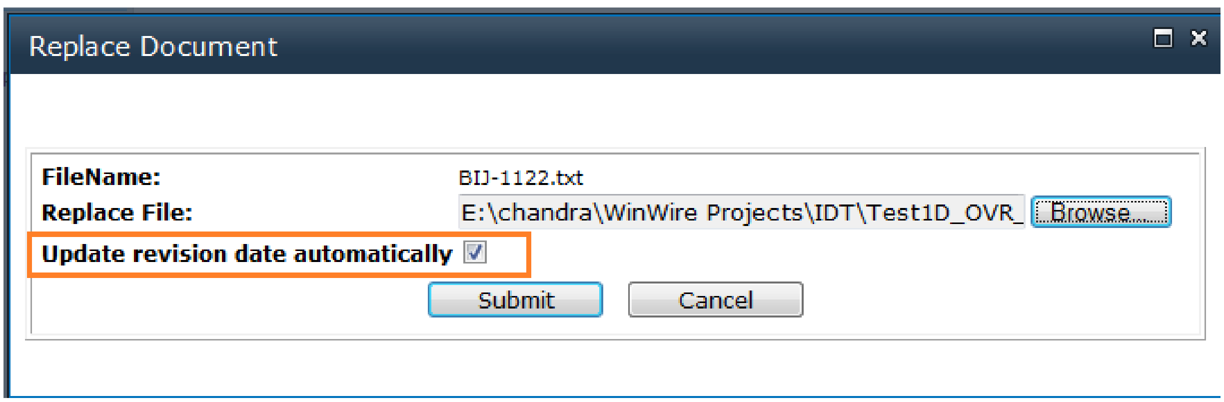


Figure 13- Select document window

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



- 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”.



- 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.

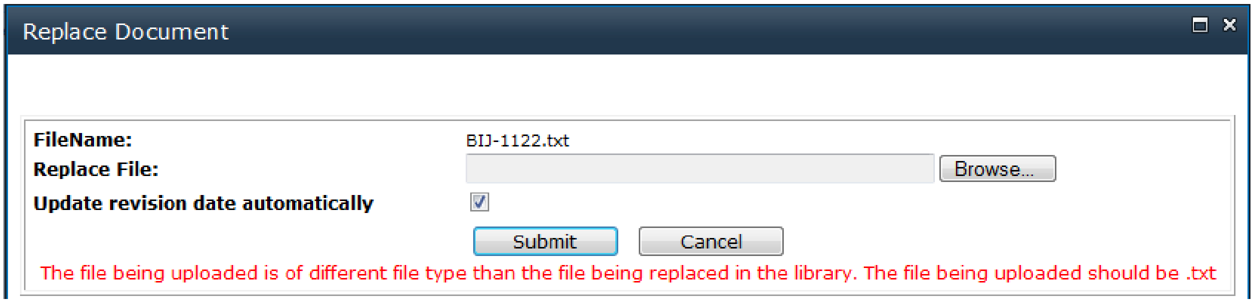
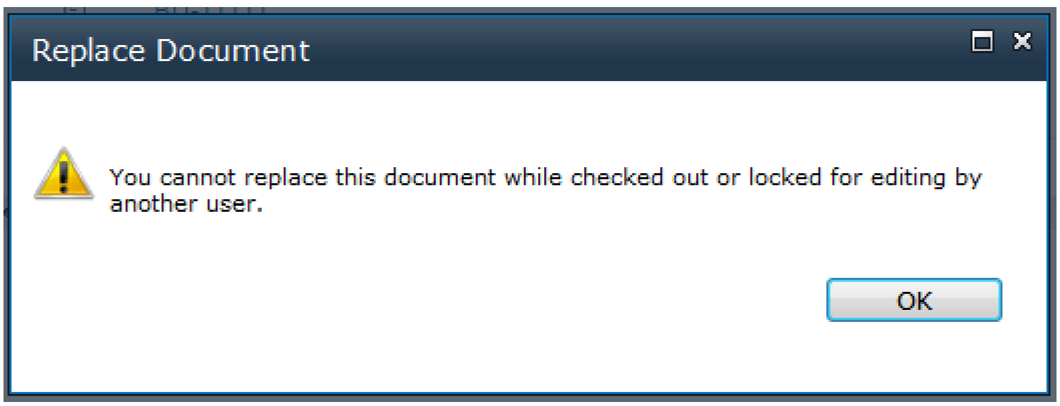


Figure 14 Replace file error

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



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

- Enter into the site, by typing the site URL (http://docs.idt.com) 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.)

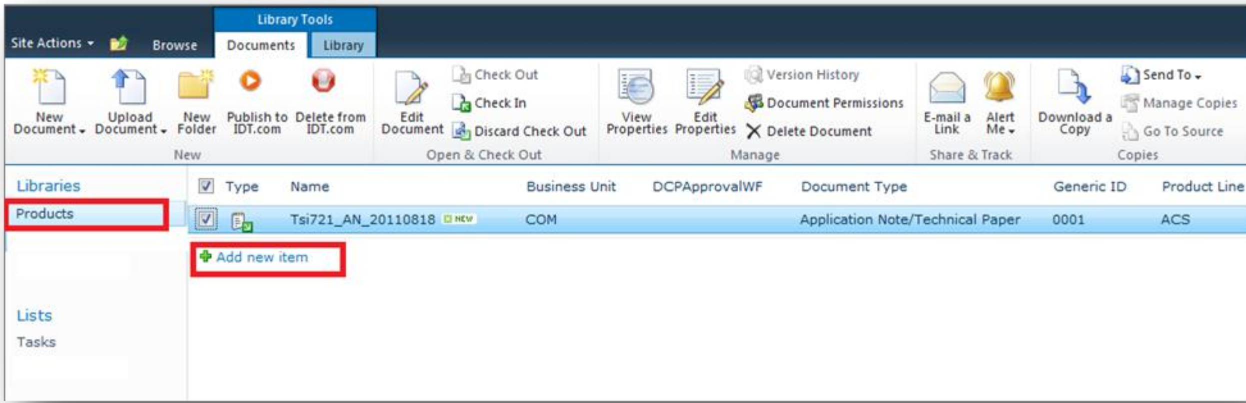


Figure 15: Products Document Library

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

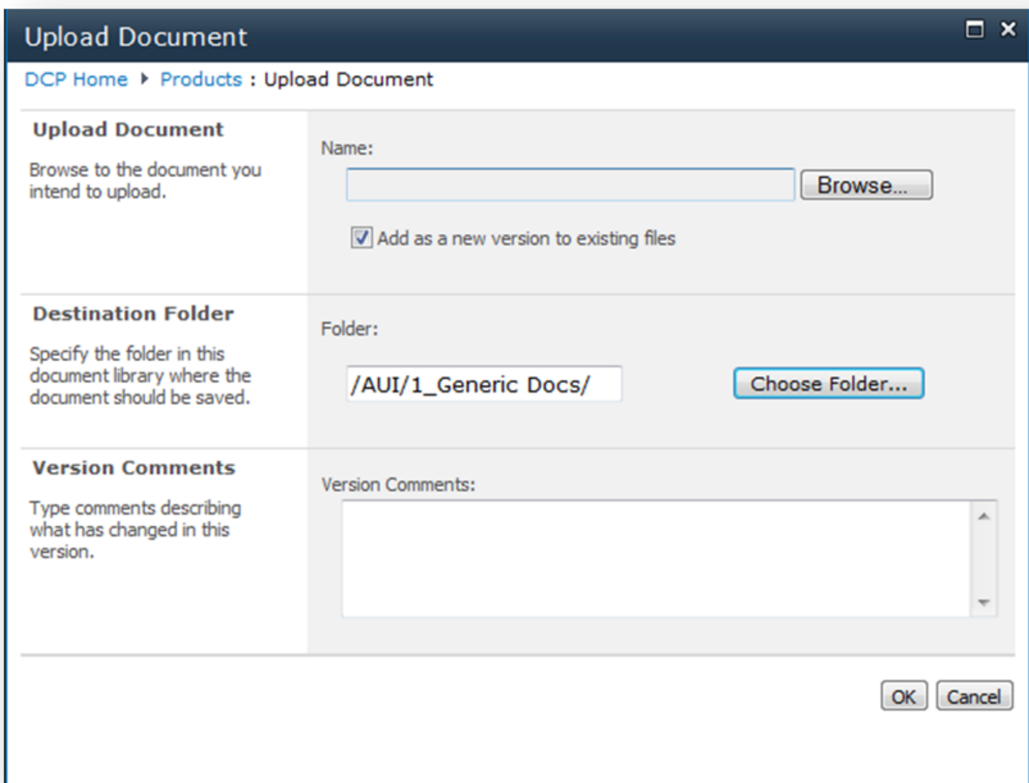


Figure 16: Document Upload screen

- 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.

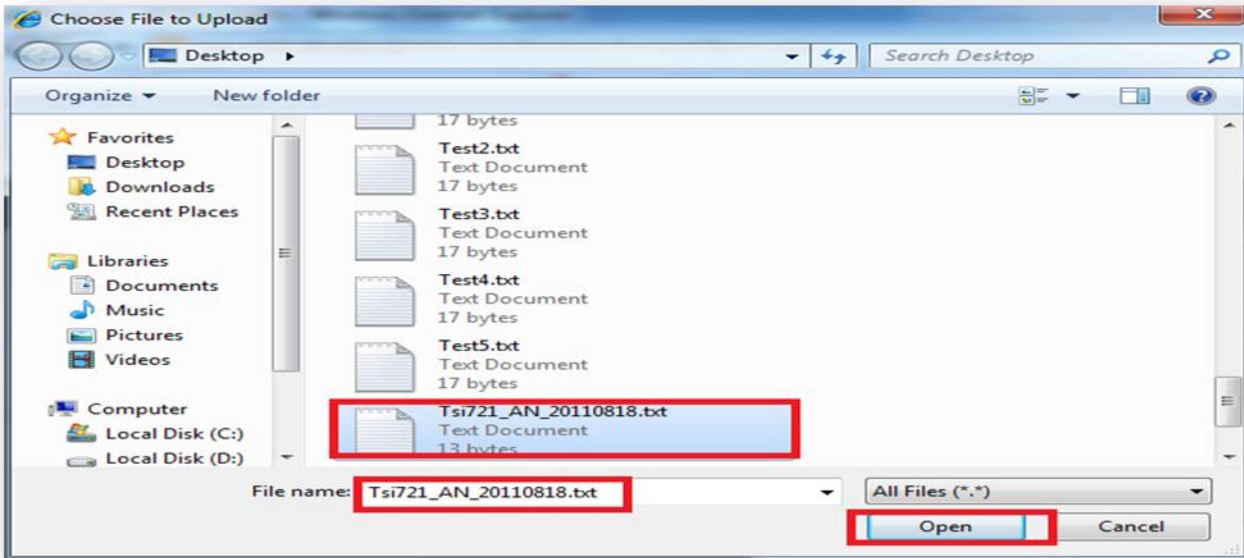


Figure 17: Selecting a document to upload

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

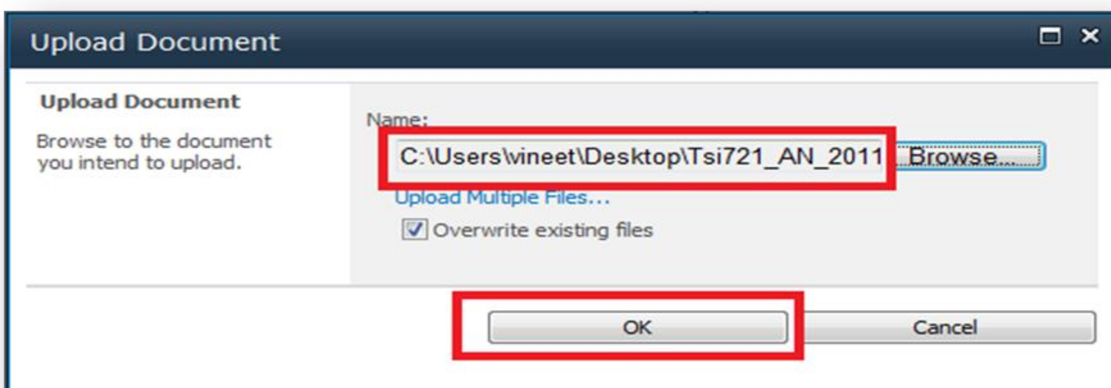


Figure 18: Document upload screen with selected document.

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

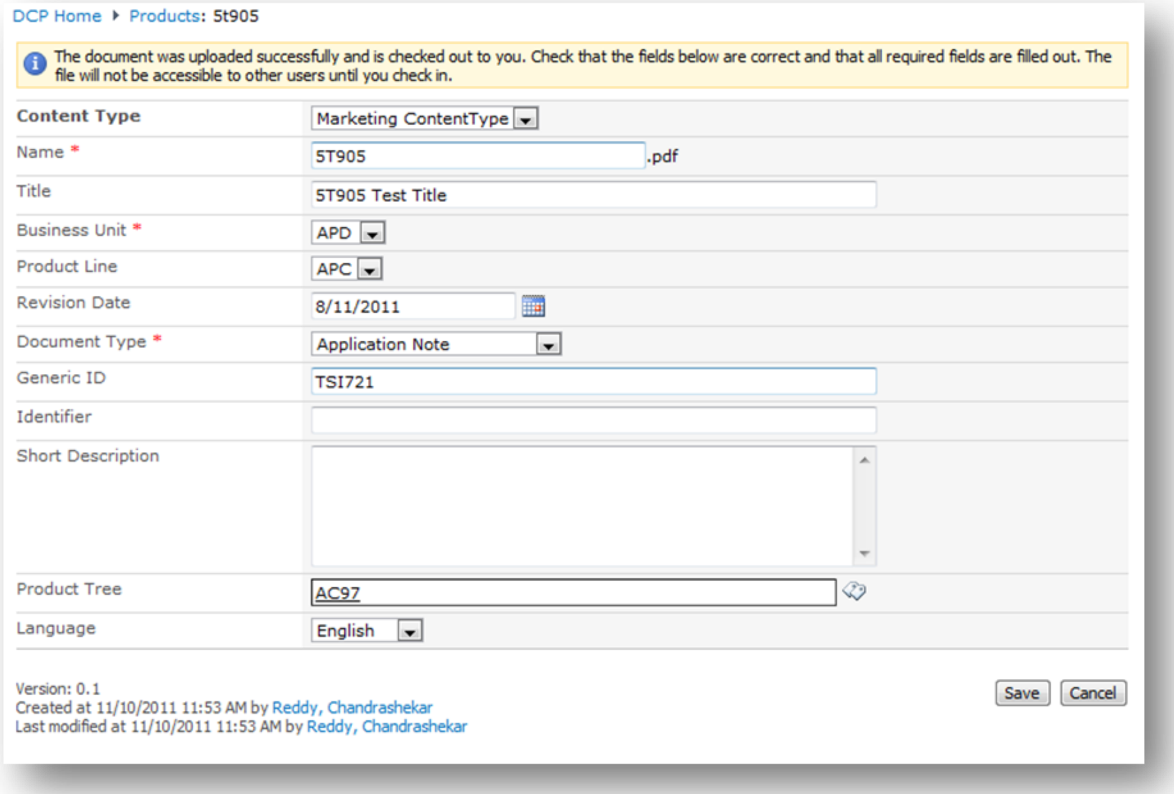
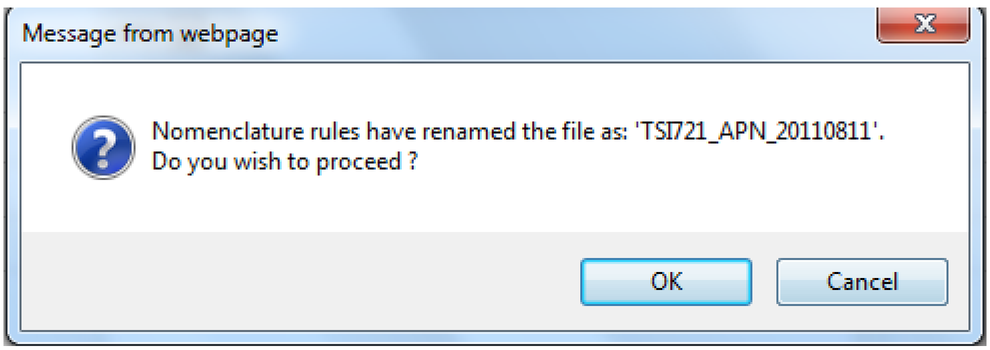


Figure 19: Document edit properties screen

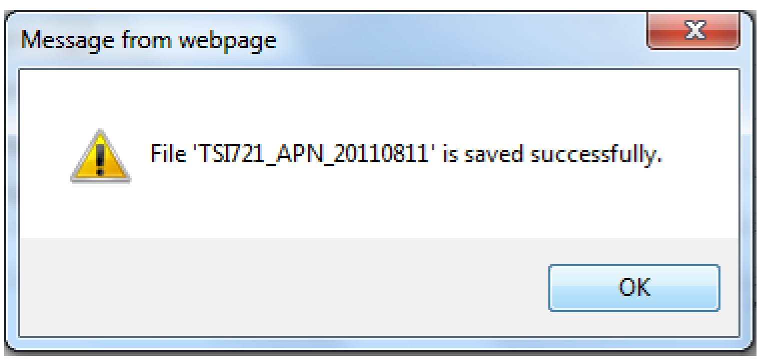
Name	Single Line of Text	Used for string the Name of the Document.	Required
Title	Single Line of Text	Used for storing the title to be displayed to the users.	Optional
Business Unit	Choice Column	Used for storing the associated Business Unit of the document.	Required
Product Line	Choice Column	Used for 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.



- 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.

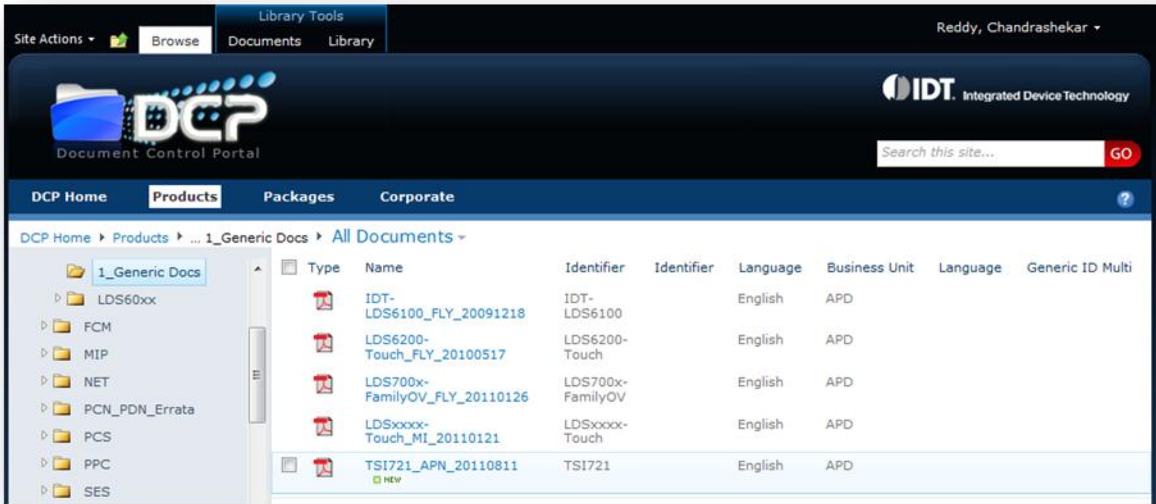


Figure 20: Products Document Library with uploaded document

- 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.

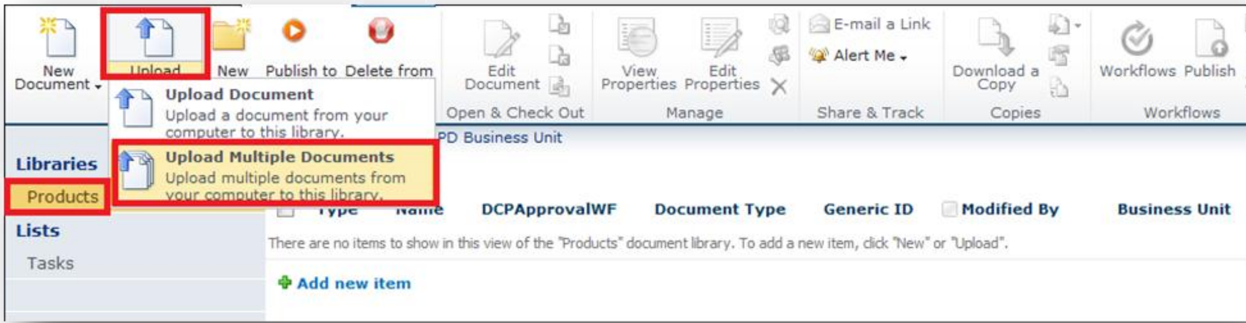
Note: Applicable for document libraries with version history disabled (not enabled).

5.4 How to Upload Multiple Documents to Document Library?

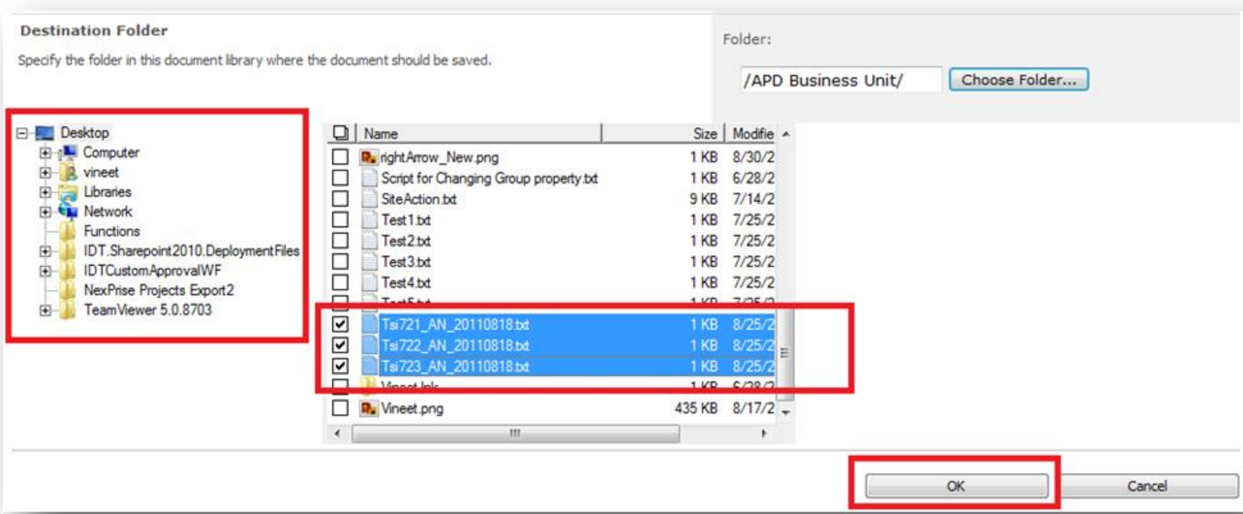
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.

- 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.

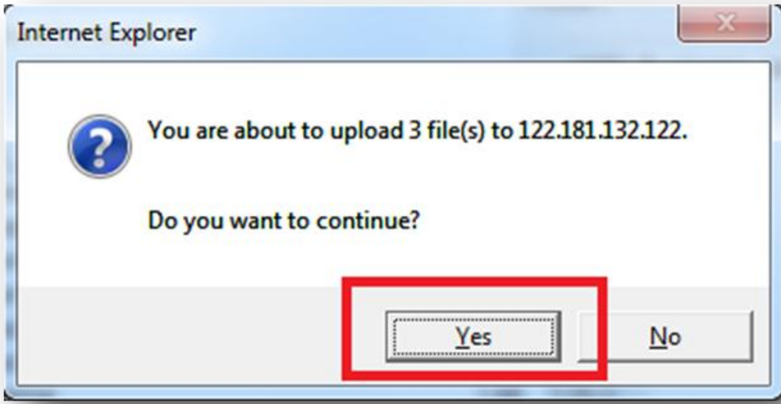
- Now from the ribbon tab, click "***Upload Document***" icon and then "***Upload Multiple Documents***" to upload multiple Documents (as shown in fig.).



- 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).

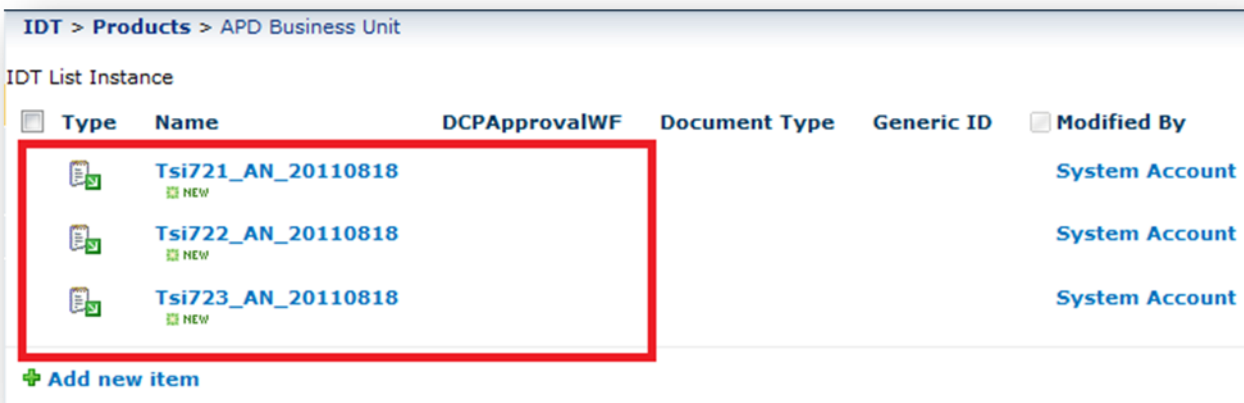


- Now user would be prompted for saving the document (shown in below fig.).
- Click on "***OK***" button to save the documents (shown in below fig.).



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

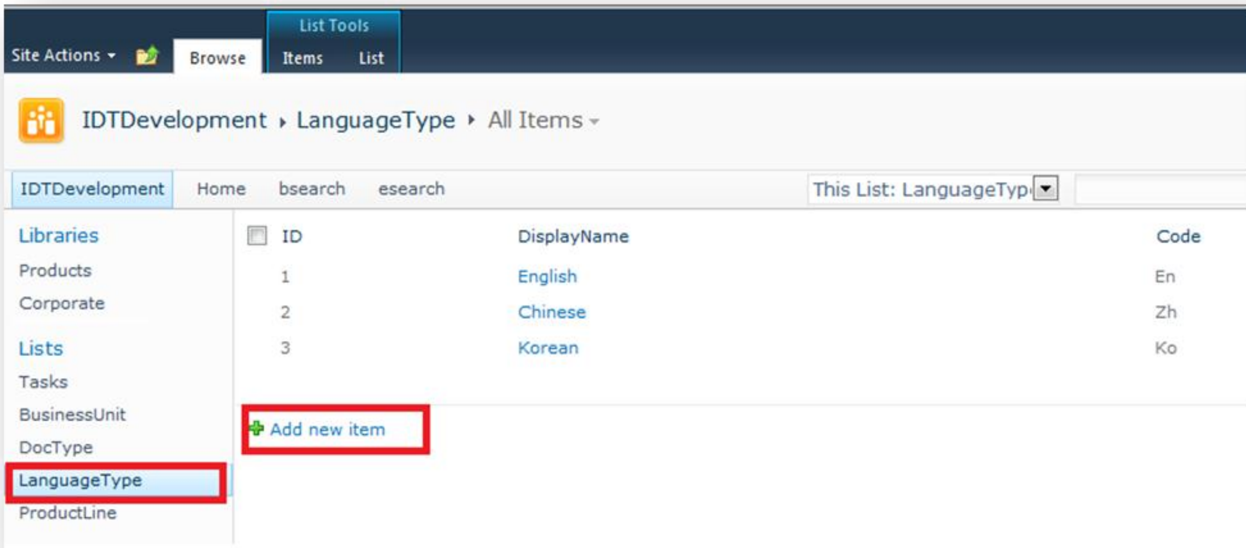
- **Note**: More on "***Check-In/Check-Out***" is covered later in section 6.9.



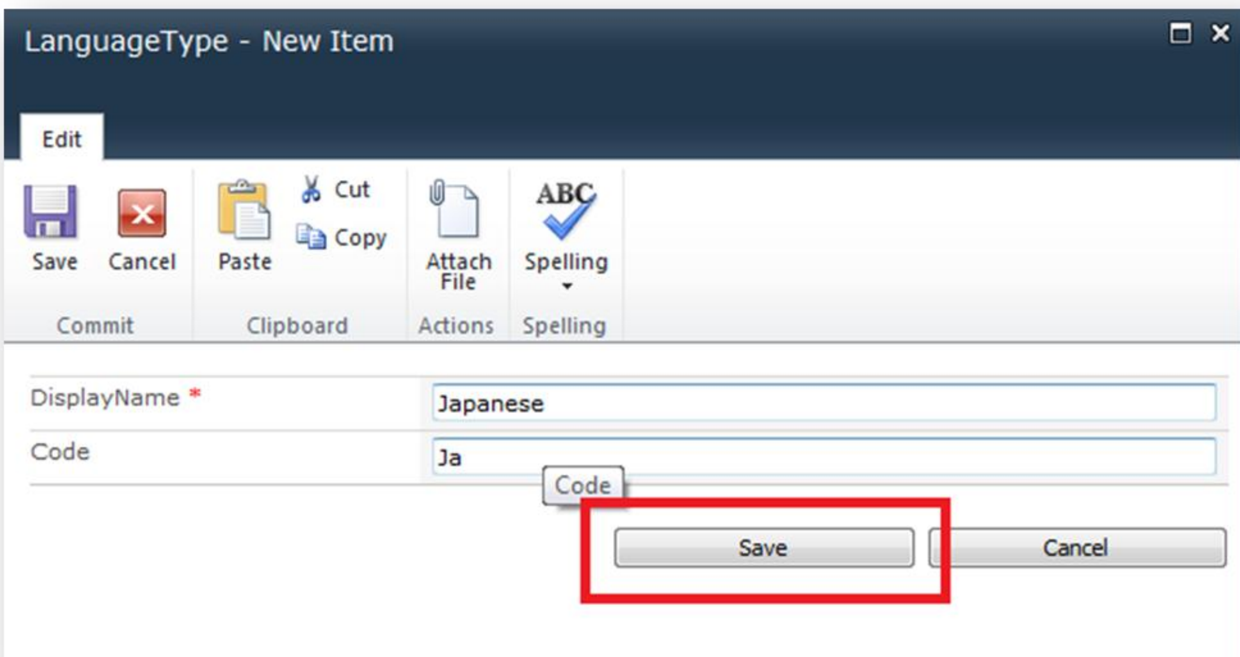
- Please check-in all the documents and add all the mandatory fields by taking the reference of section 6.9.2.

5.5 How to insert values into a List?

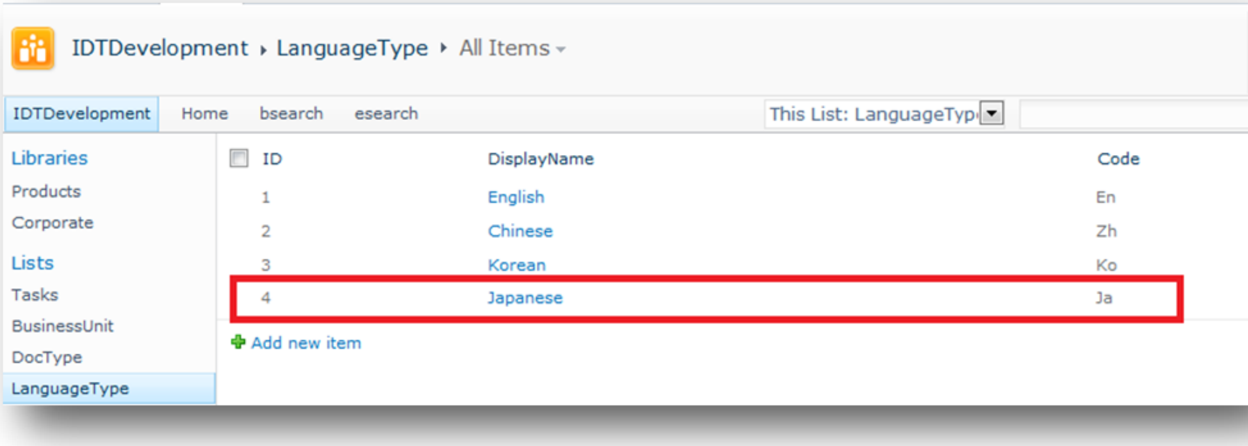
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the List name, present on left hand side of the site (also called left navigation bar), where we need to add an item.
- Now click on "***Add new item***" (highlighted below in red).



- 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.).

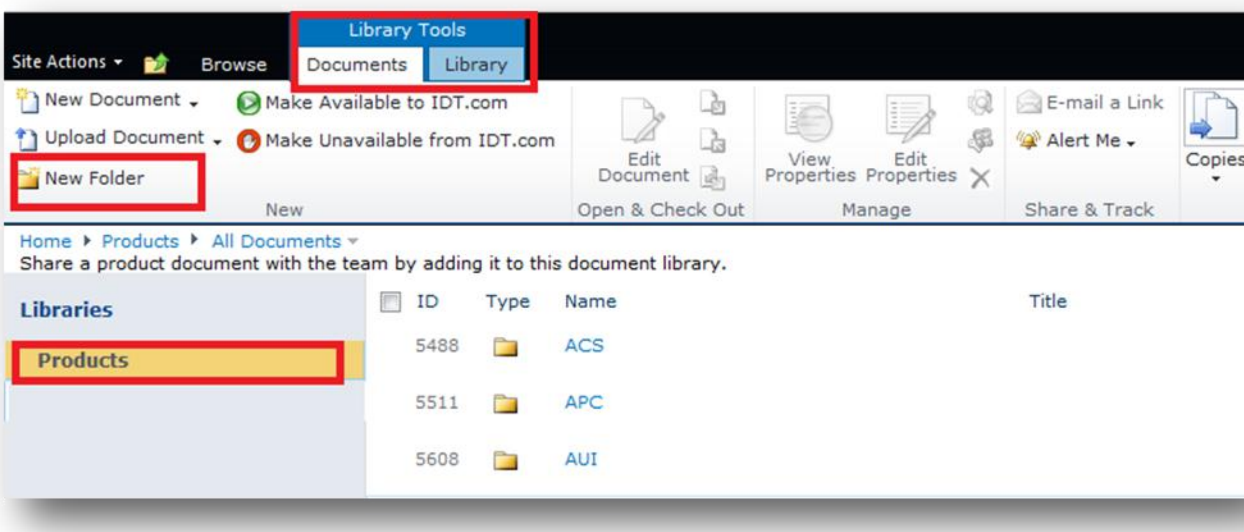


- A new record would be added as shown in below fig.

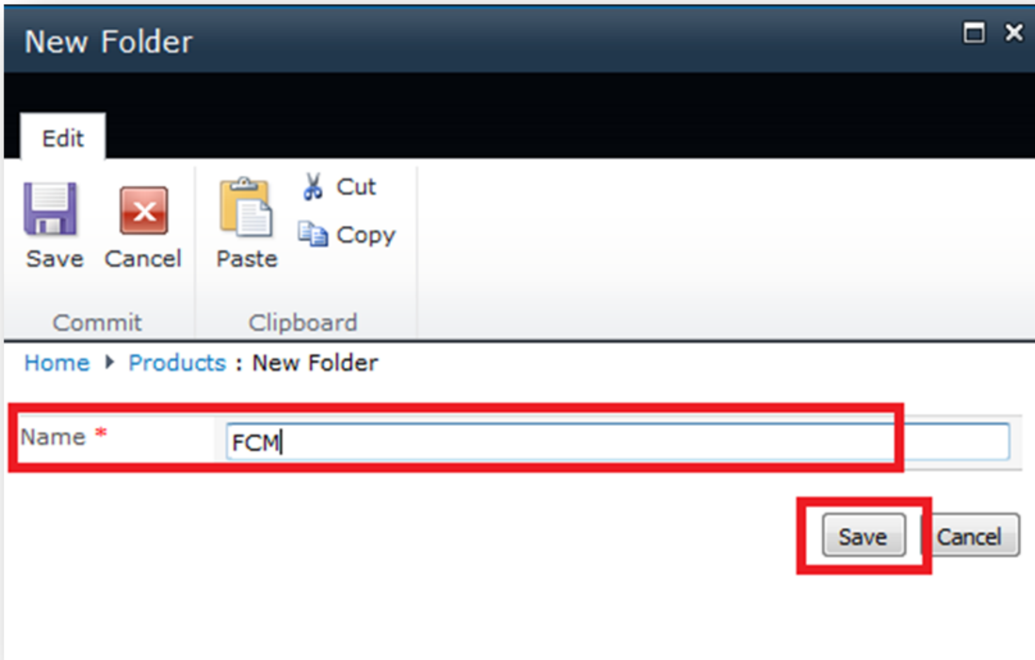


5.6 How to Create Folders in a List\Document Library?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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).



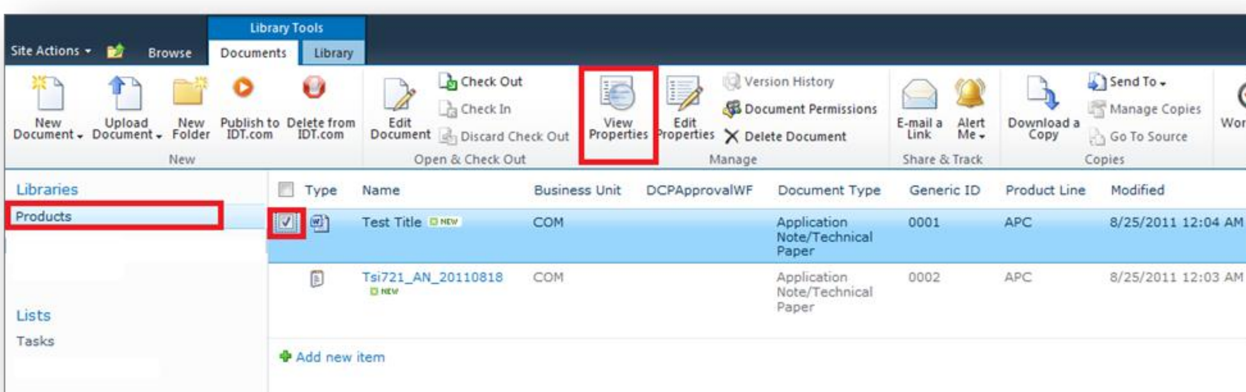
- A new window will open as shown in below fig., prompting user to enter the name of the folder.
- Enter the name for the folder and click on save button.



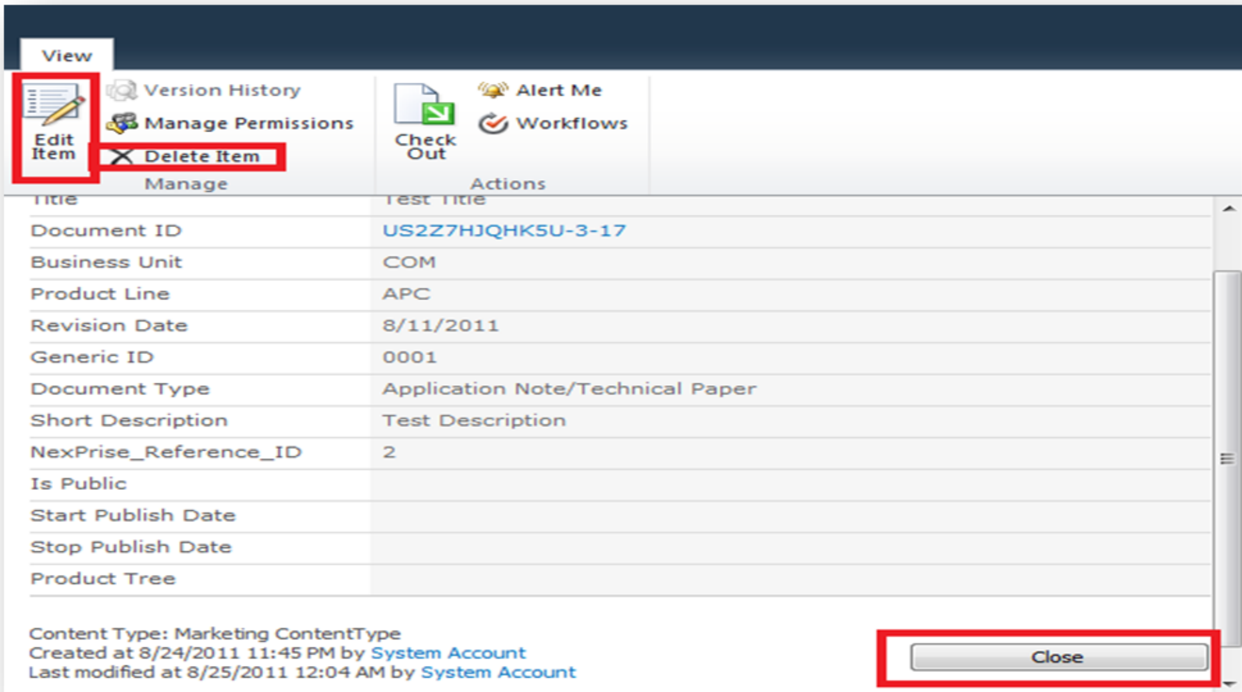
- A new folder would be created with the above specified name.

5.7 How to View Properties of an uploaded Document?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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.).



- 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.

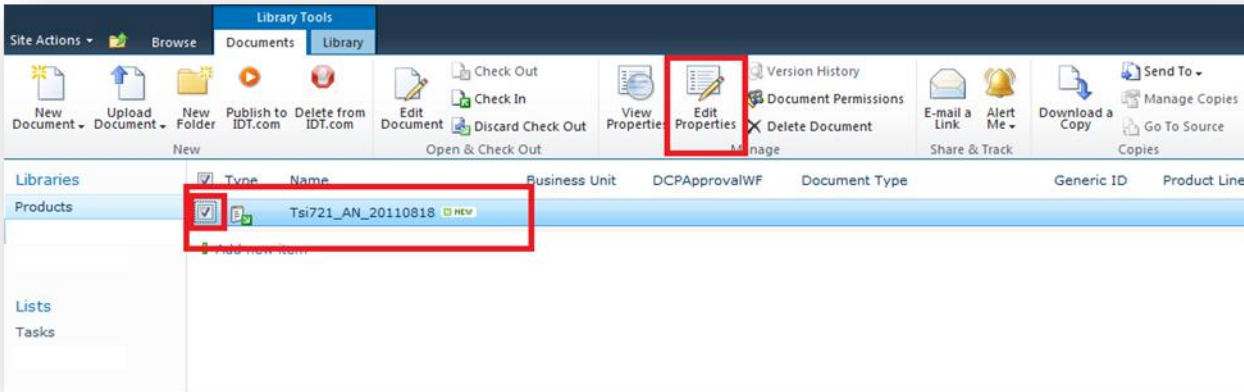


- **Note:** Properties of 2 documents cannot be seen by selecting 2 check boxes and clicking on "***View Properties***".

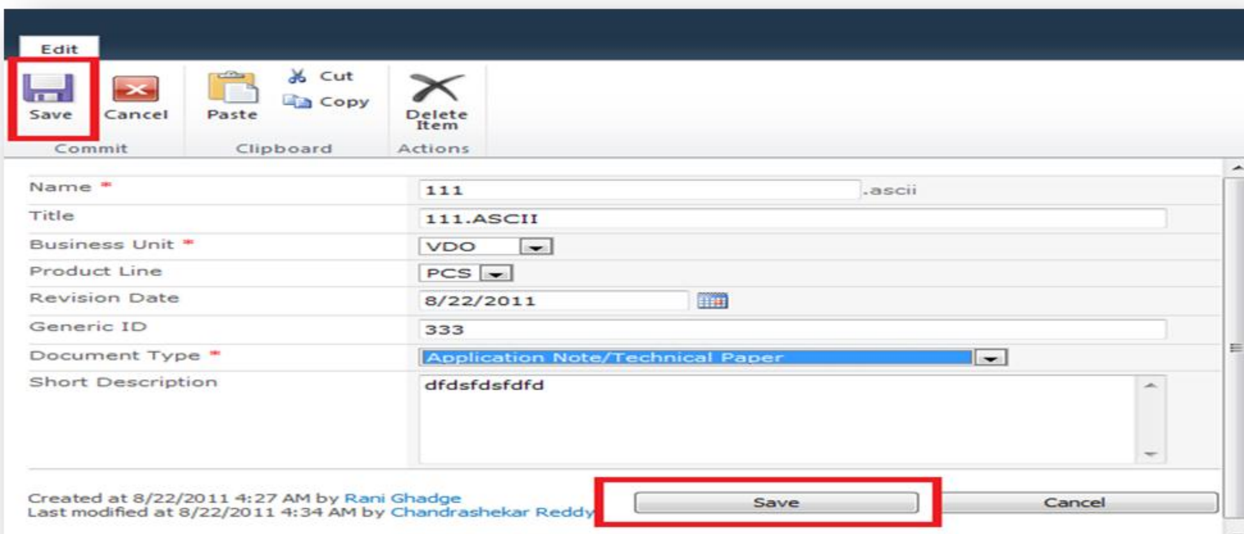
5.8 How to edit properties of an uploaded document?

5.8.1 Auto Check-in feature disabled

- Enter into the site, by typing the site URL (http://docs.idt.com) 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.).

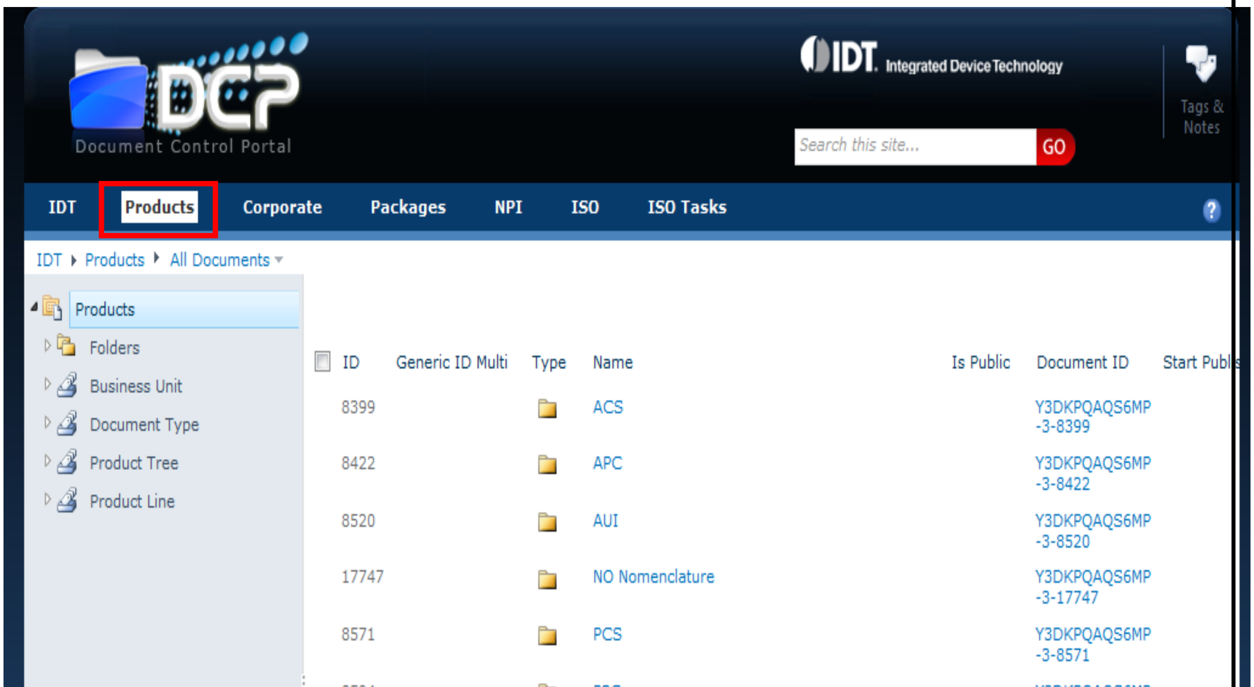


- A new screen would appear displaying the property of the item in edit mode.
- Edit the properties which we want to edit and then click on "***Save***"button(save button is present on the bottom of the form and also on the ribbon control, anyone could be used for saving the document)

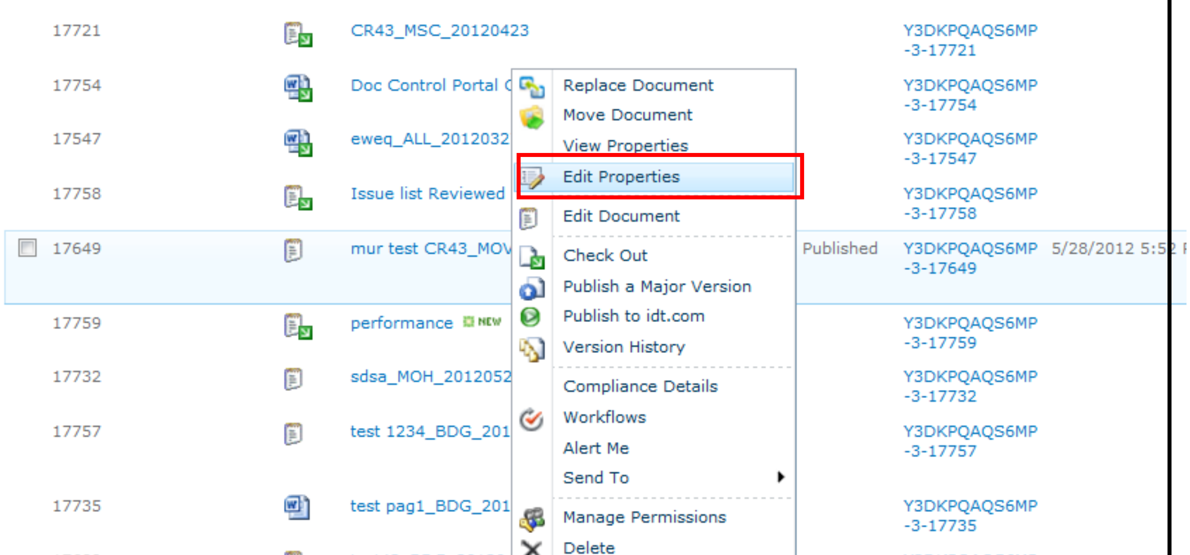


5.8.2 Auto Check-in feature enabled

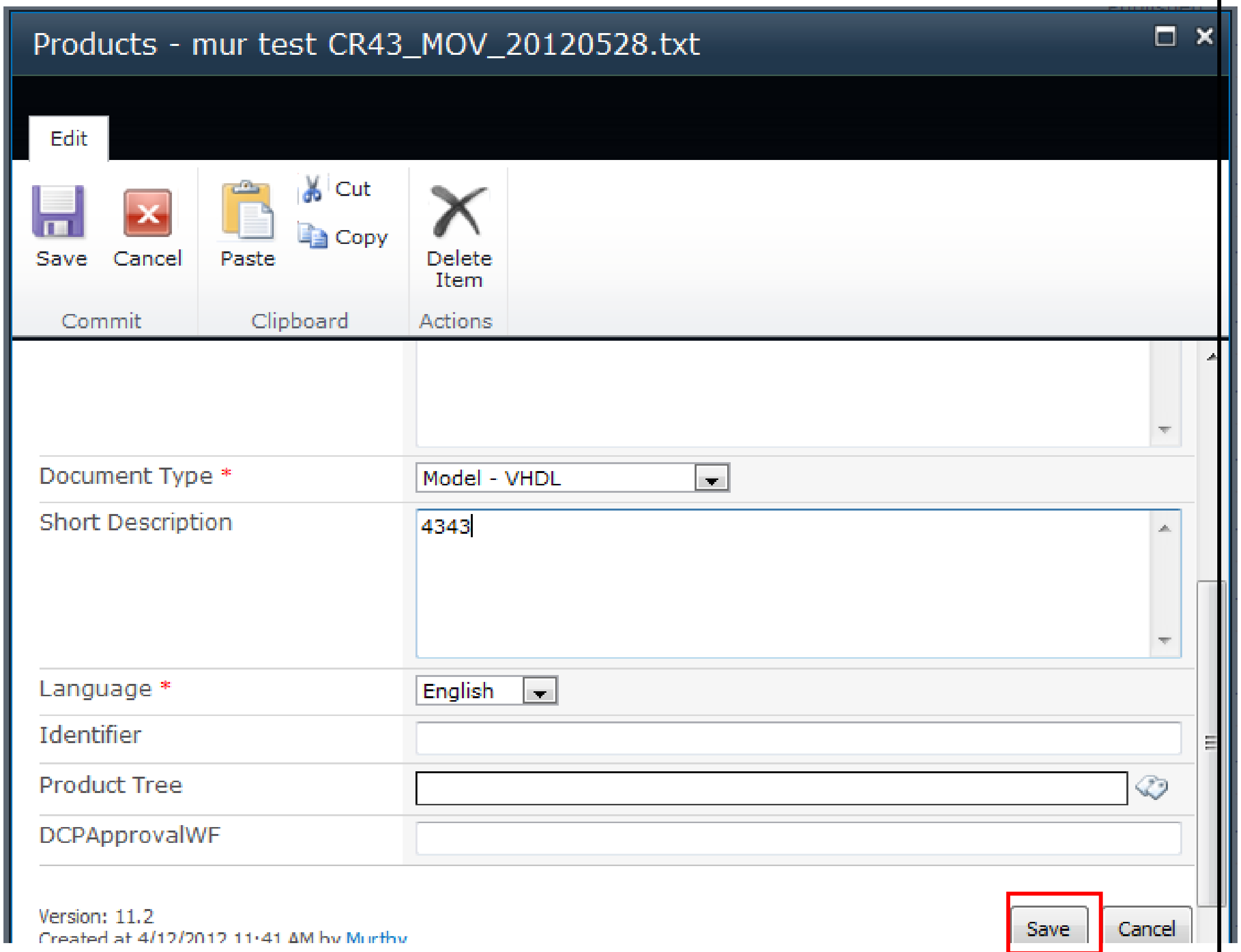
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Products Document Library, present on the top.



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



- Now Edit and click on save.

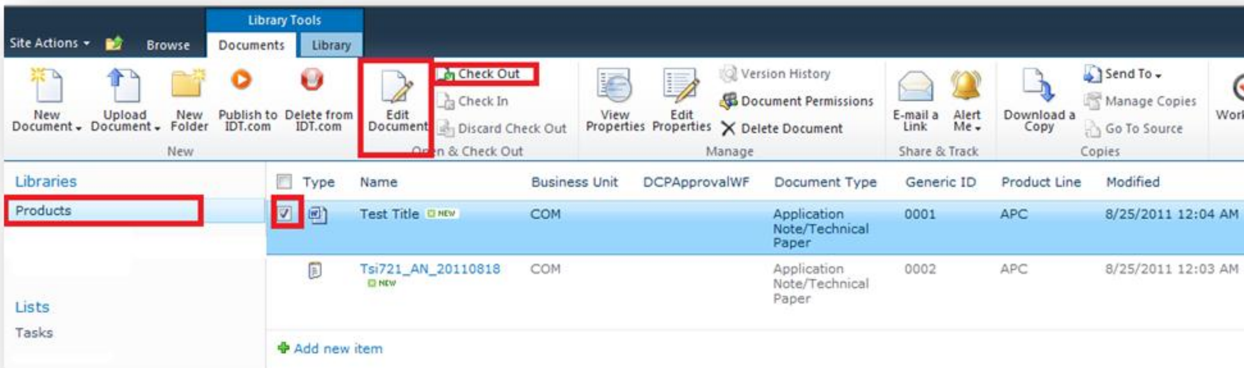


- Now it should navigate to the check in page after clicking on save.

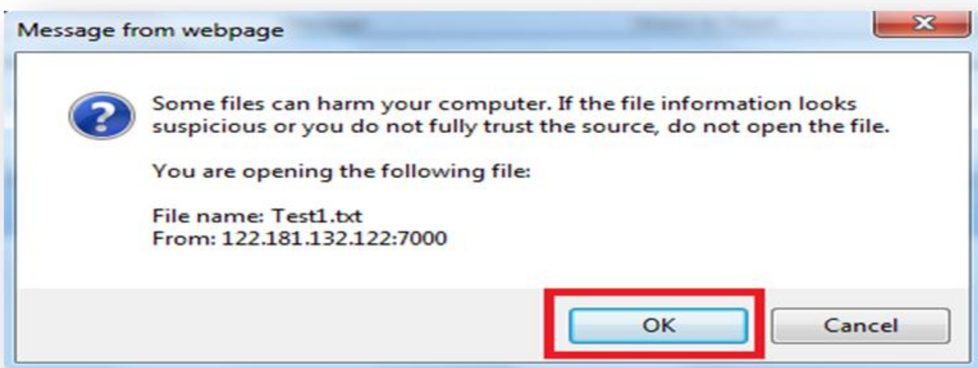
Now any option from above three options and click on ok and see that the file is checked in after that.

5.9 How to edit the Uploaded Document?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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.).

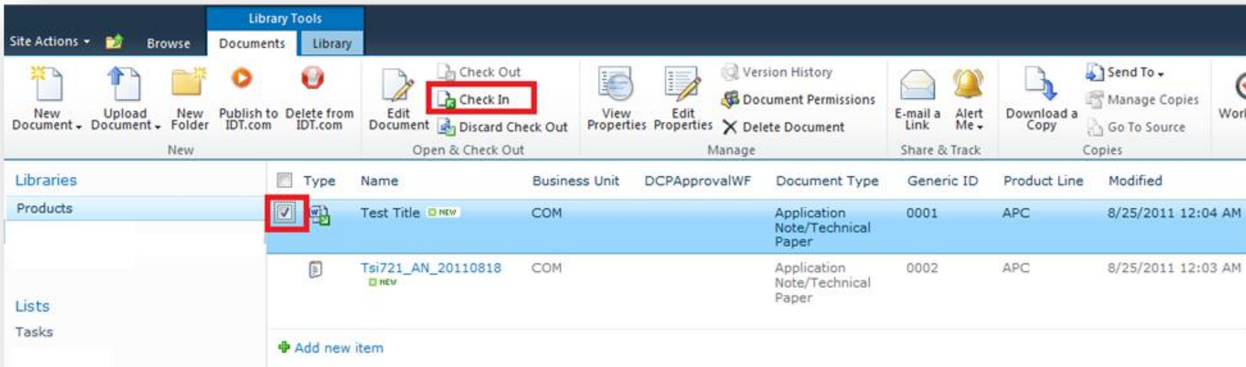


- On click of "***Edit Document***" icon, it'll prompt with a warning message, as shown in fig. Click on "***OK***" button to continue.

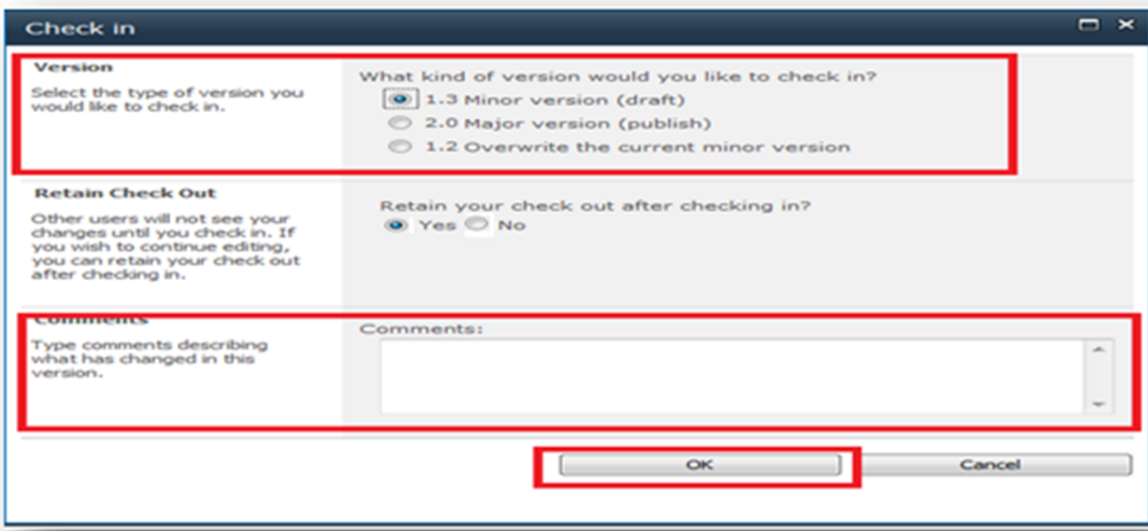


- Now it'll open the uploaded document. Make the desired changes. Save the document and close it.
- Select the checkbox, present just before every item (shown in fig.), corresponds to the item for which we edited just now.

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



- 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.

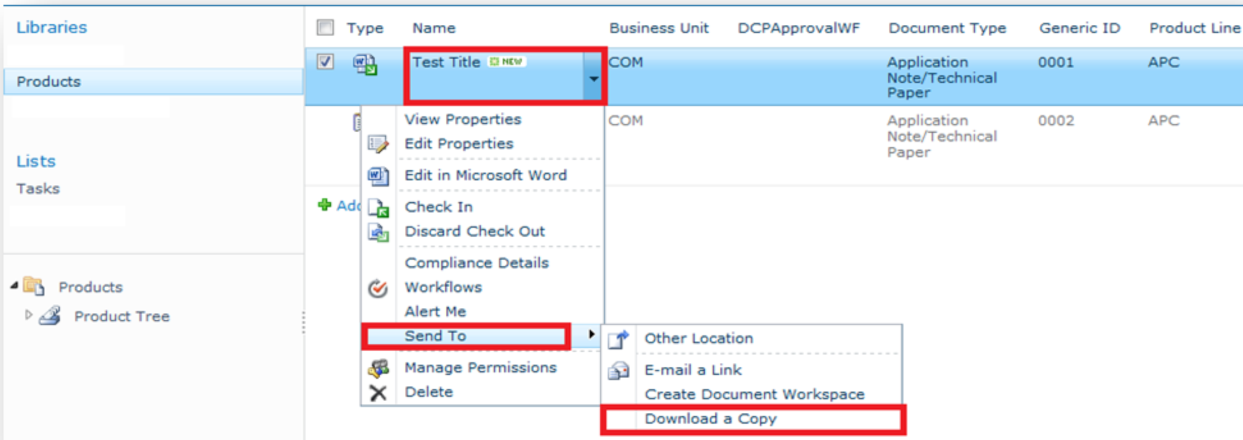


- Now our document is saved in the document library with proper version and comment attached to it.
- **Note**: More on Check-In/Check-Out of the document is covered in section 12-h. of this document.

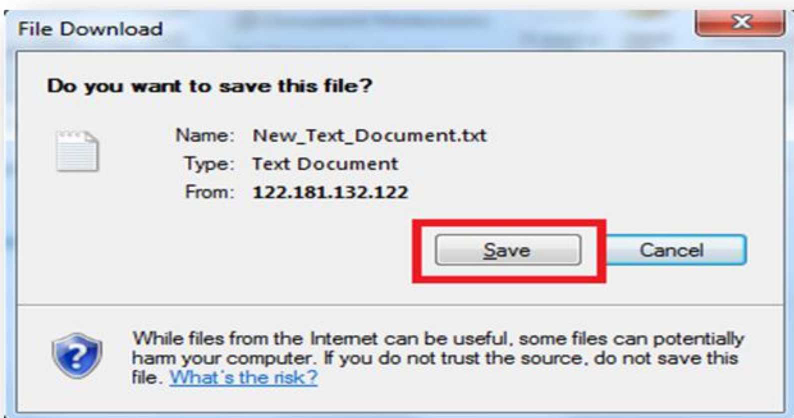
5.10 How to download a copy of the document from SharePoint?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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.

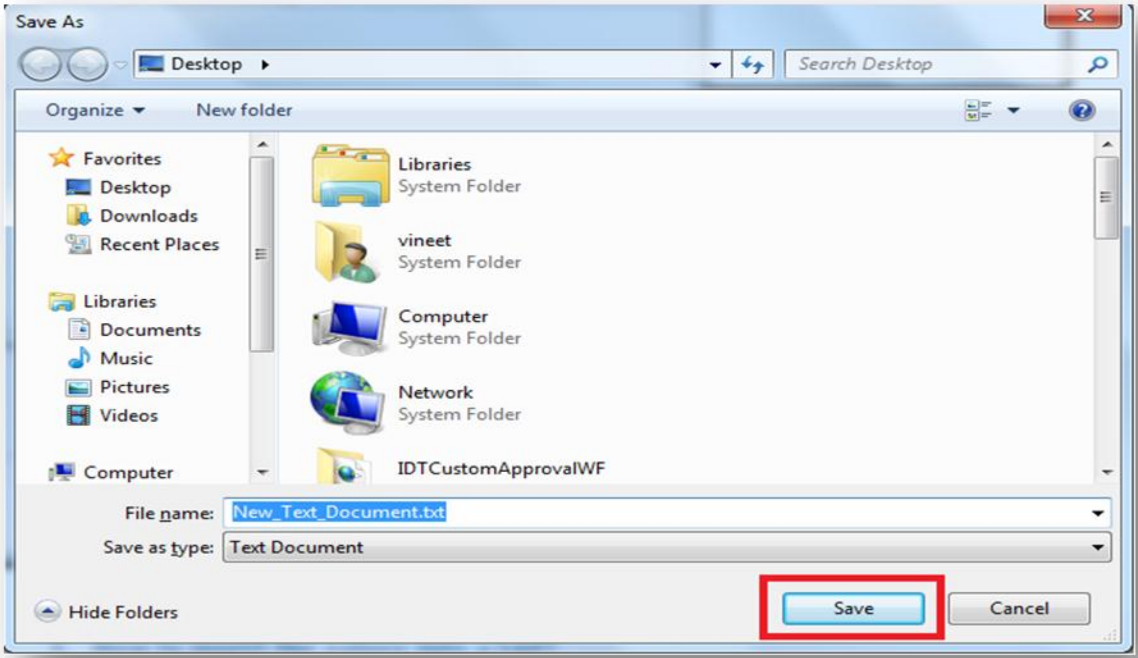
- Click on the arrow button, present on the right side of the Name field, for the item for which we want to download the document.
- Now take the cursor to "***Send To***" option.
- A new popup will appear, select "***Download a Copy***" from there (shown in fig.).



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

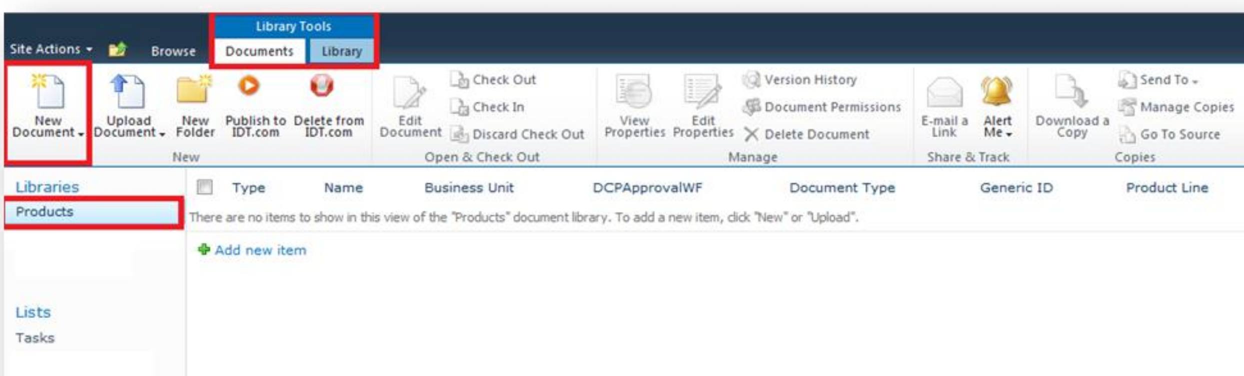


- Screen would display a window, prompting user for the path to save the downloaded document.
- Click on "***Save***" button to save the document (shown in fig.).
- After downloading our document would be present in the selected path.



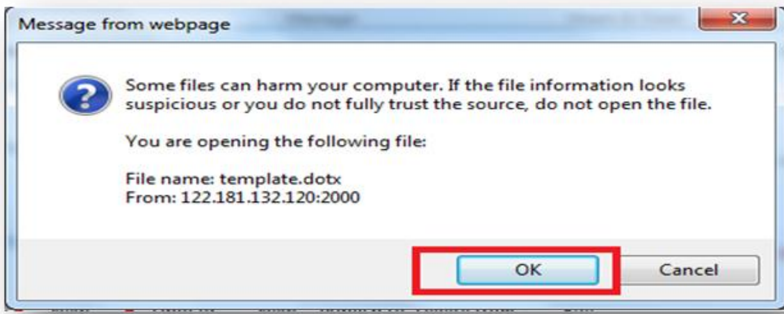
5.11 How to create a new document in a Document Library?

- Enter into the site, by typing the site URL (http://docs.idt.com)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.

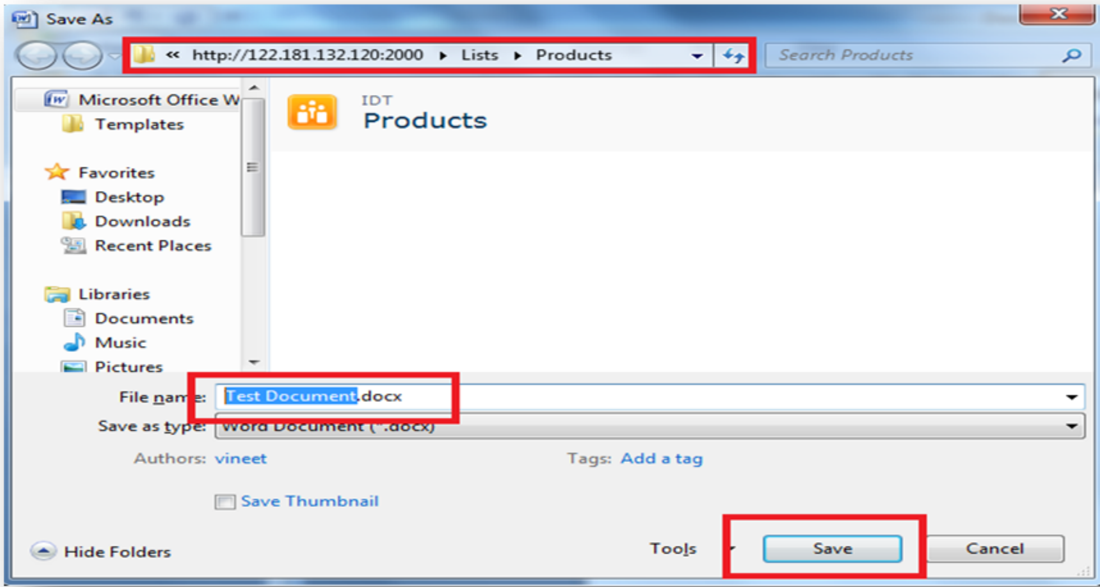


- User would be prompted with a warning message. Click on "***OK***" button to continue

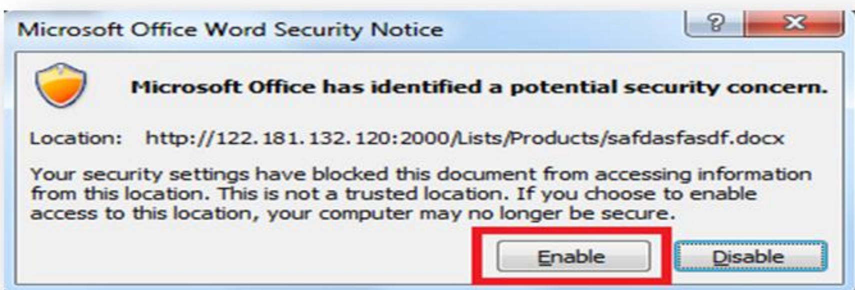
- **Note**: This is a warming message generated by "SharePoint OpenDocuments Class ActiveX control (Filename: OWSSUPP.DLL). It is possible to turn off this warning message by disabling the “SharePoint OpenDocuments Class” add-on from Internet Explorer >> Manage Add on screen but this will also turn off 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→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.



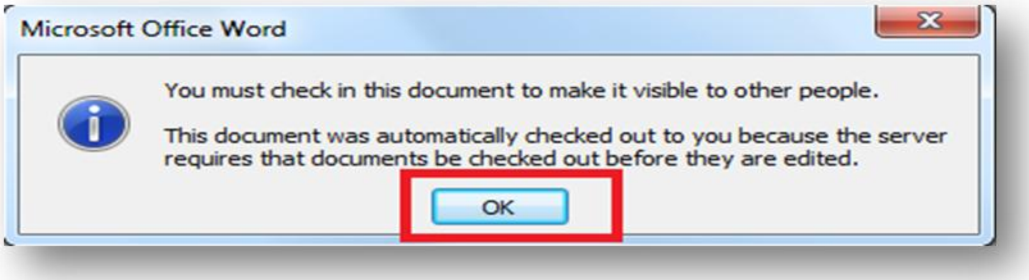
- After this users would be prompted with the below warning messages. Click on buttons which are highlighted in red.

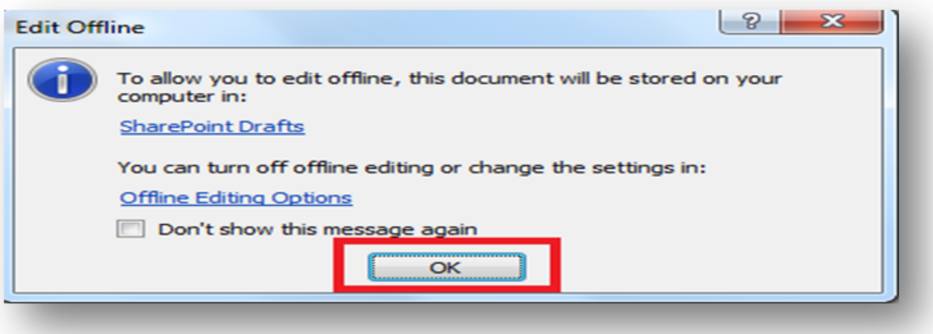


This above security warning occurs because the file attempts to command the office application (word, excel, etc.) to make a connection with the SharePoint server. With ever-increasing concerns about viruses, Trojan horses and worms getting into our computers, all software vendors by default lock down 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.

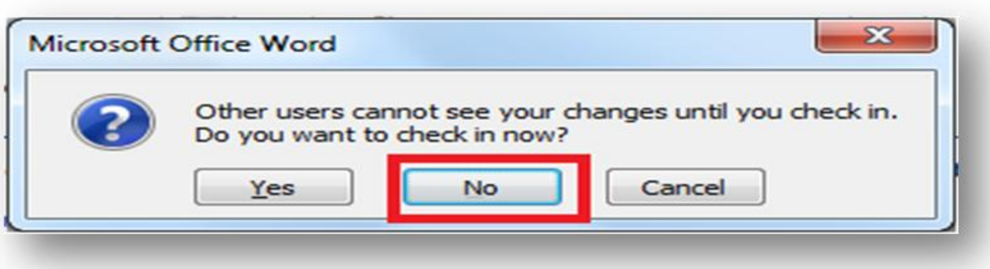
- In Internet Explorer version 7or 8, on the **Tools** menu, click **Internet Options**.
- On the **Security** tab, click **trusted sites**, and then click **Sites**.

- 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.

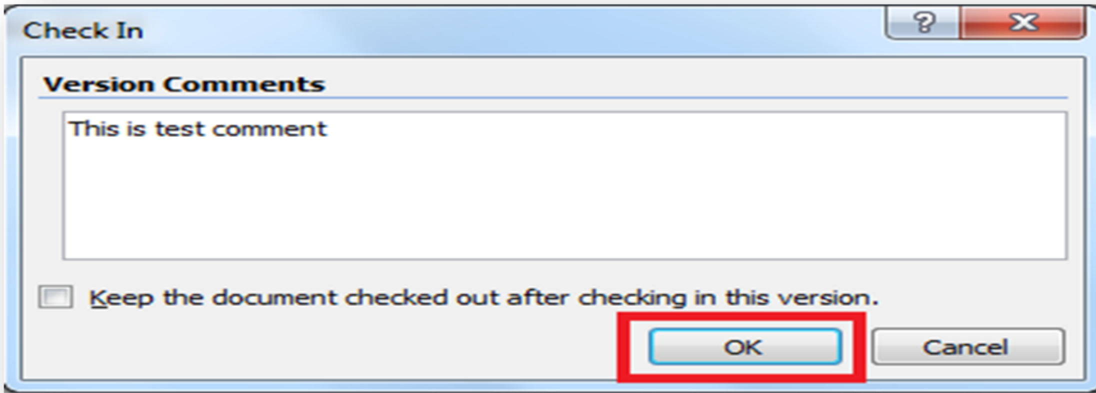




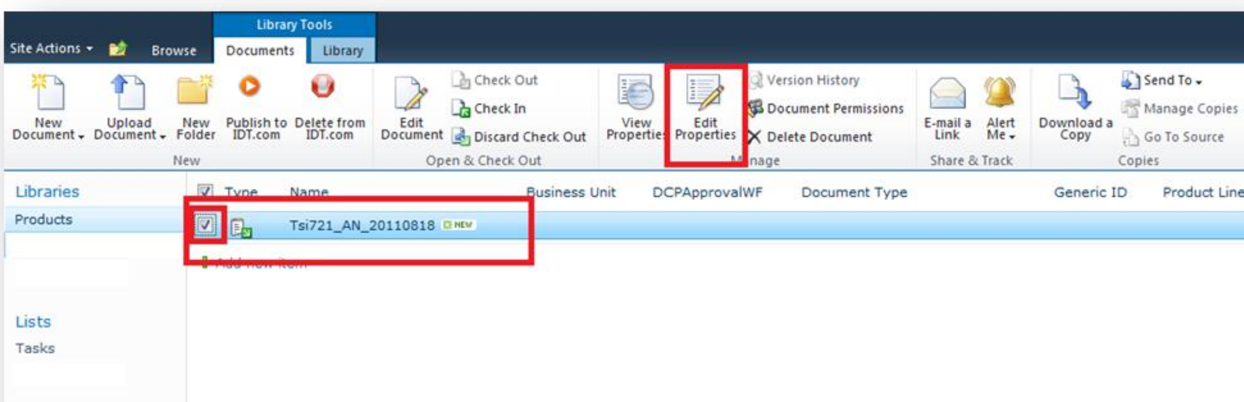
- Based on user's system settings, few of the messages may not appear as well.
- Now, close the open document. While closing, user would be prompted with below message (shown in fig.).
- Click on "***No***" to continue.



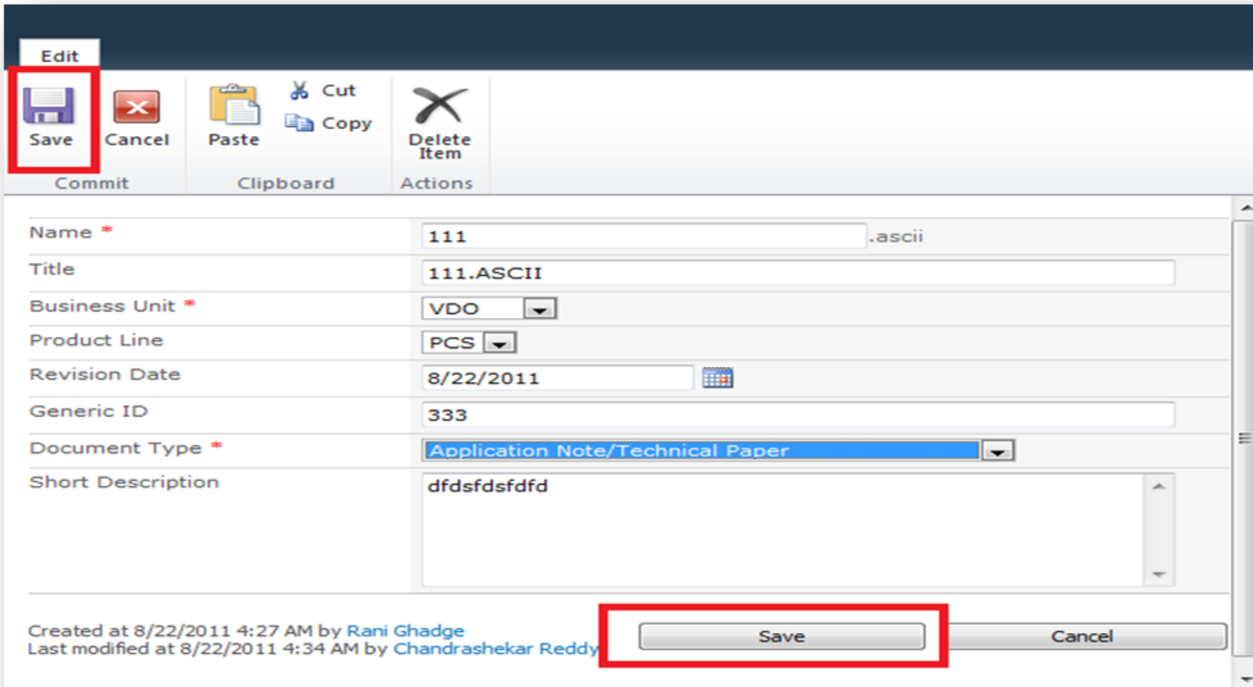
- Now enter the desired comment and click on "***OK***" button to continue (as shown in the fig.).



- 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.).



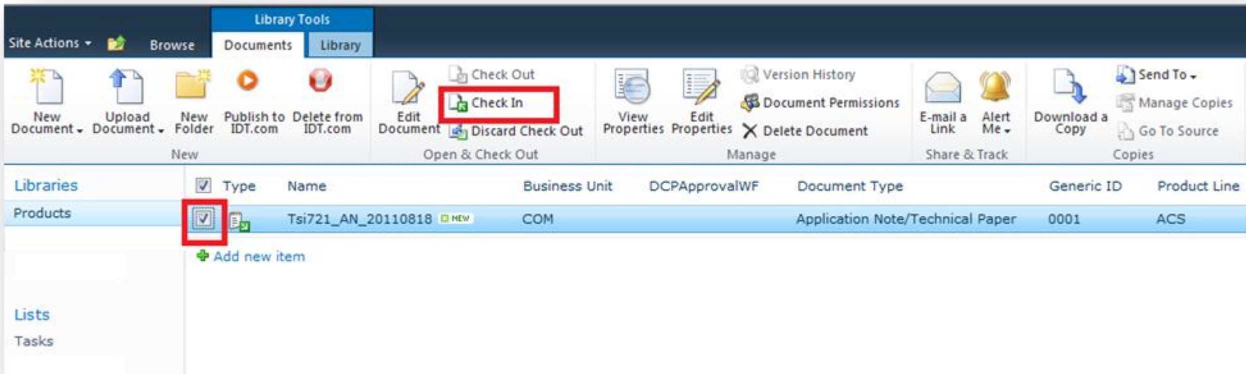
- A new screen would appear displaying the property of the item in edit mode.
- Now enter the properties and click on "***Save***" button (save button is present on the bottom of the form and also on the ribbon control, either of them could be used for saving the document). Some of the fields are required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



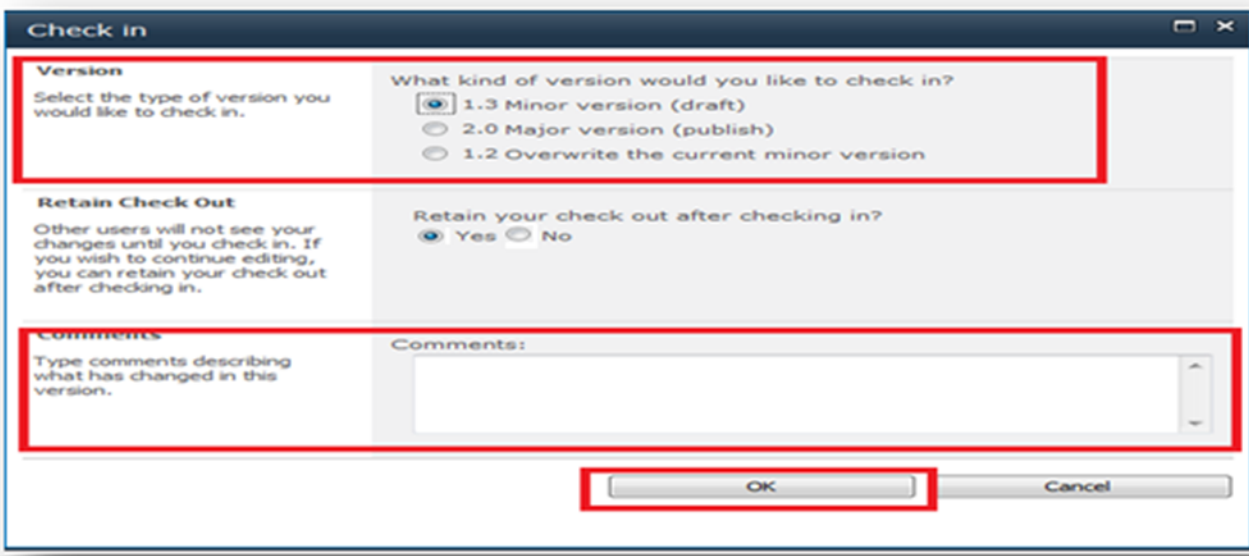
- The following Table given below explains the different fields and their significance in "***Products***" Document Library.
-

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.).



- 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.



- 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:

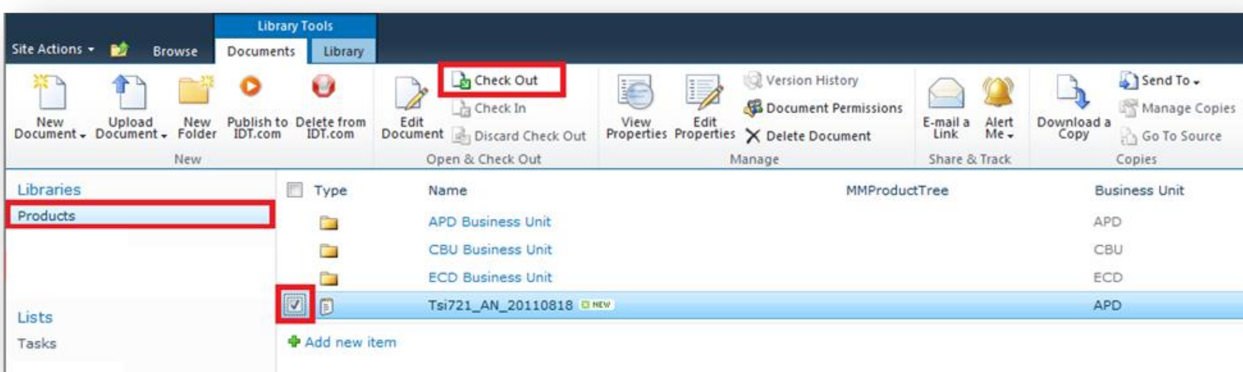
When you check out a file from a library on a Microsoft Windows SharePoint Services site, it ensures that others cannot make changes to the file while we are editing it. While the file is checked out, we can edit the file, close it, reopen it, and even work with the file on our hard disk. Other users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

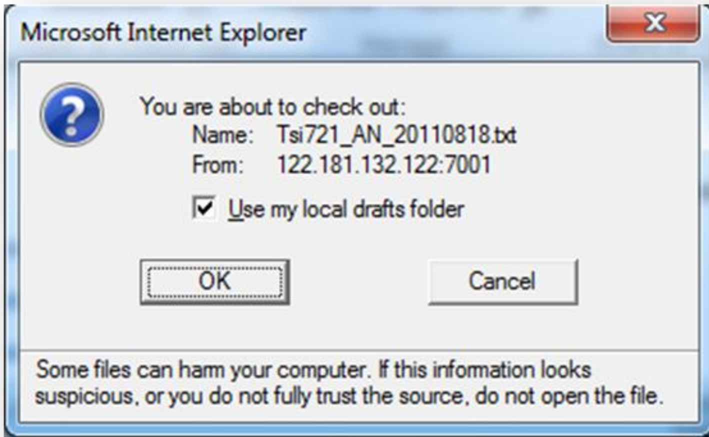
When we check in a file, we can type comments about the changes that we made to the file. This helps people to understand what has changed in the file from version to version. This is especially helpful if several people work on a file or if the file is likely to go through several revisions. If our 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 (http://docs.idt.com) 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.



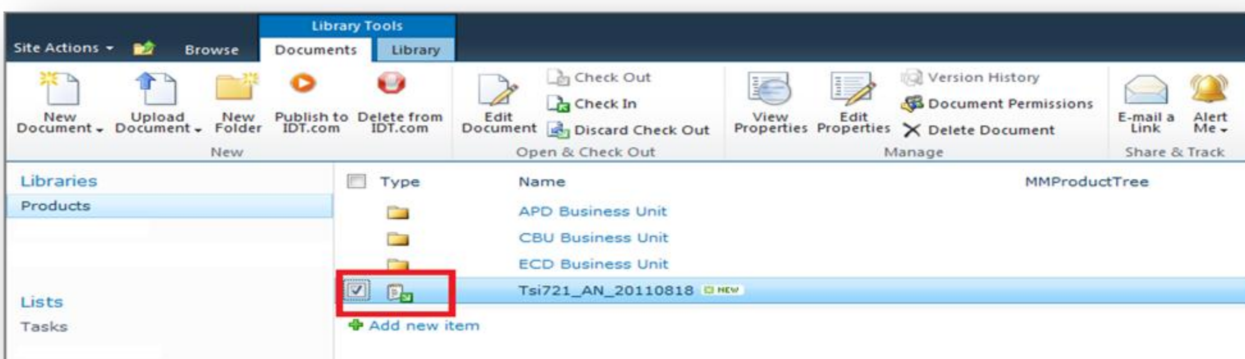
- We would be prompted again for checking out the document, as shown below.
- Click on "***OK***" button to check out the document.



- 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.

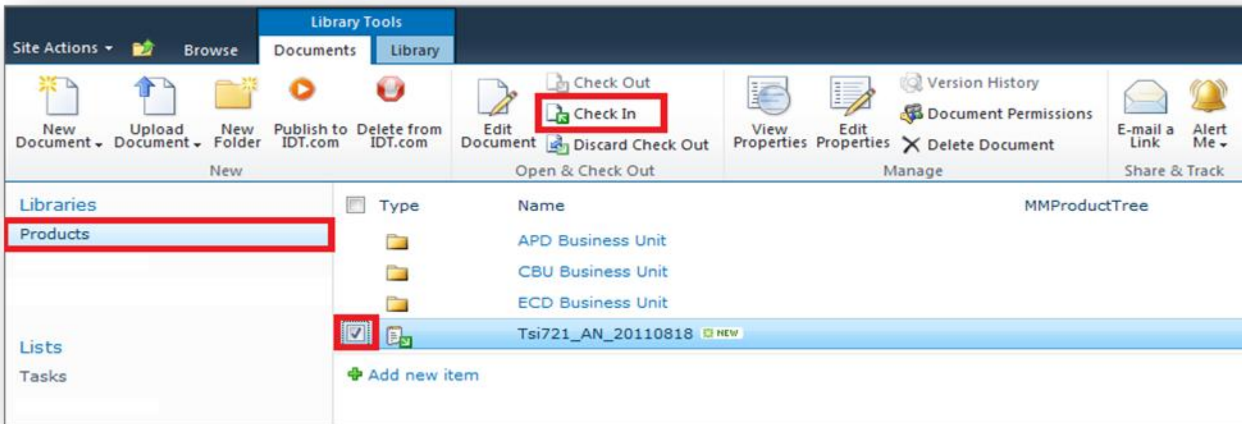
- Now the document is checked out on our name and will have and will have a green colored arrow mark on right bottom corner,  as shown in fig. below.



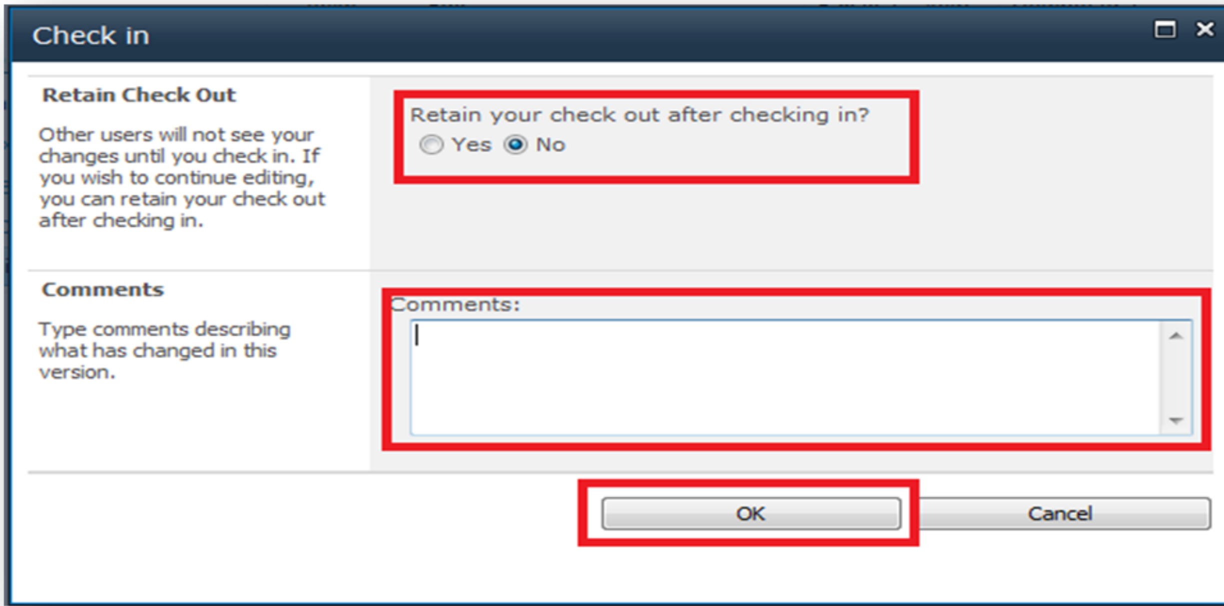
5.12.2 How to Check-In a Document:

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

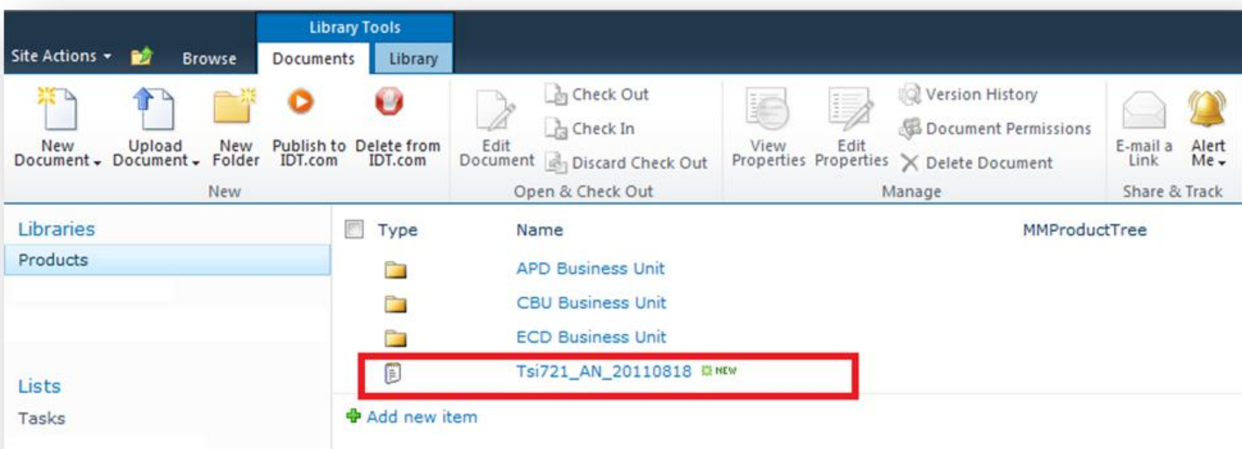
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to check-In any checked-out Document.
- Select the checkbox, present just before every item (shown in fig.), corresponds to the checked-out document which we want to check-in.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



- 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.).

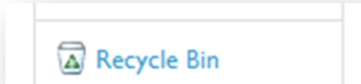


- Now, we can see that the document is checked-in and green colored arrow mark on bottom right side of icon is disappeared now.

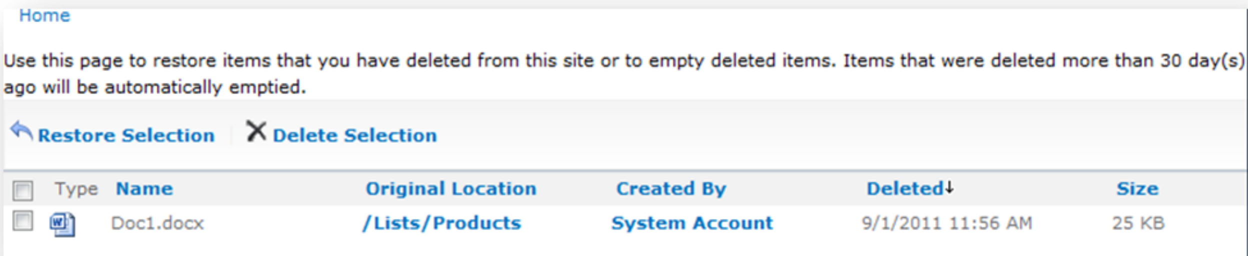


5.13 Recycle Bin

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.



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:

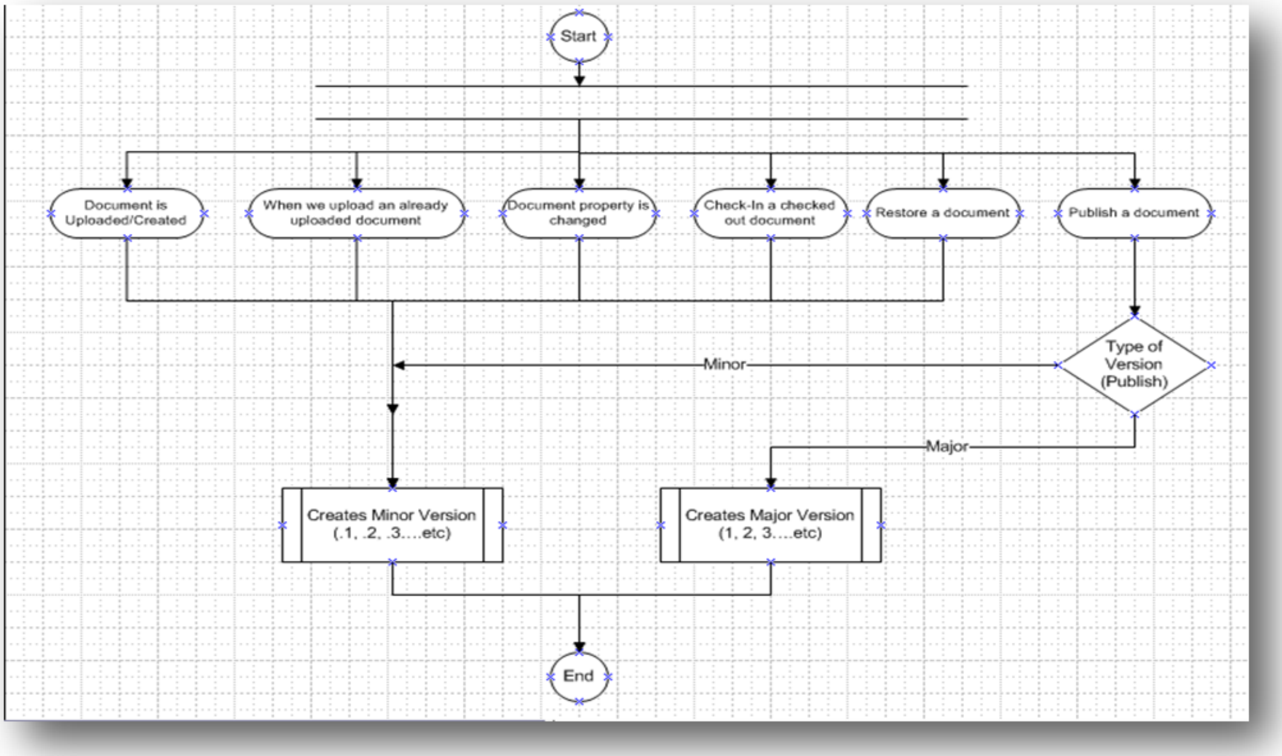
- **No versioning**: This is the default setting in which the current version overwrites the older version. There are no previous versions stored. This setting is not recommended especially if our document library contains critical or important documents.
- **Create major versions:** Also called simple 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:

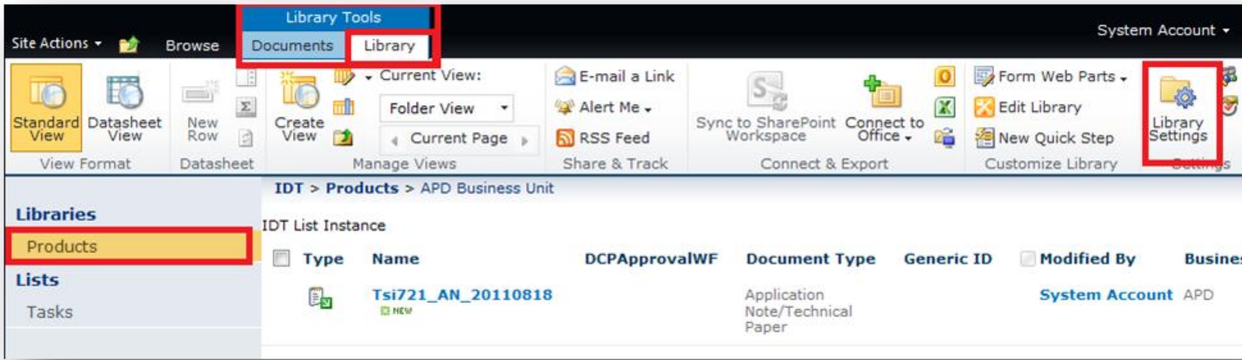
- When a new document or list item is created or uploaded into SharePoint, version 1 is created if the option "***Create major versions***" is enabled or version 0.1 is created when "***Create major and minor (or draft) versions***" is enabled (not applicable for list items) and when you publish it then 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:

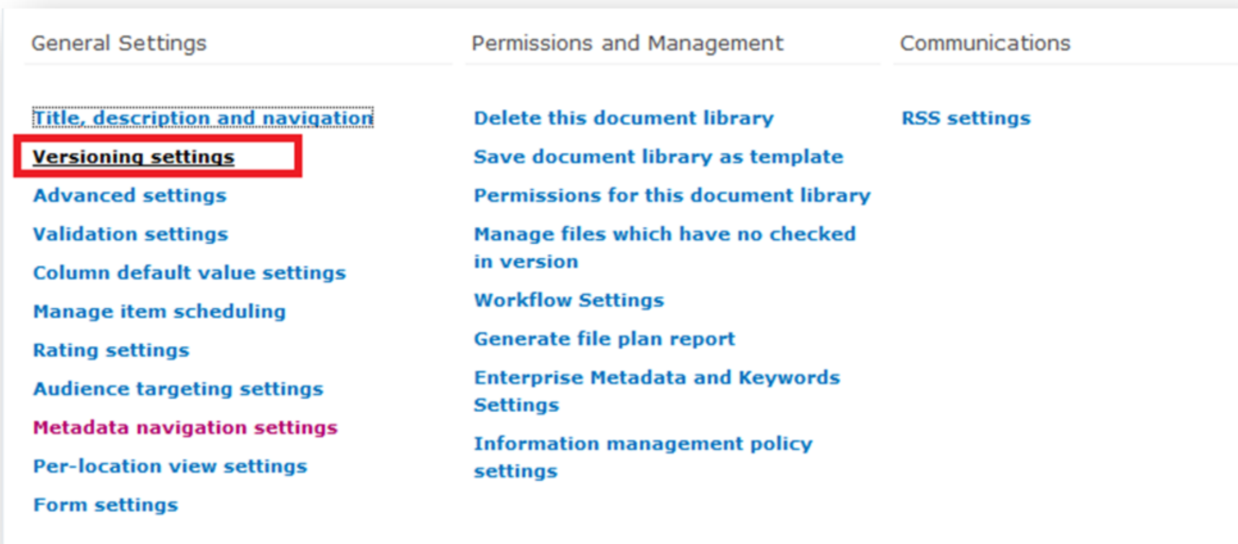


6.2 How to set the versioning in SharePoint?

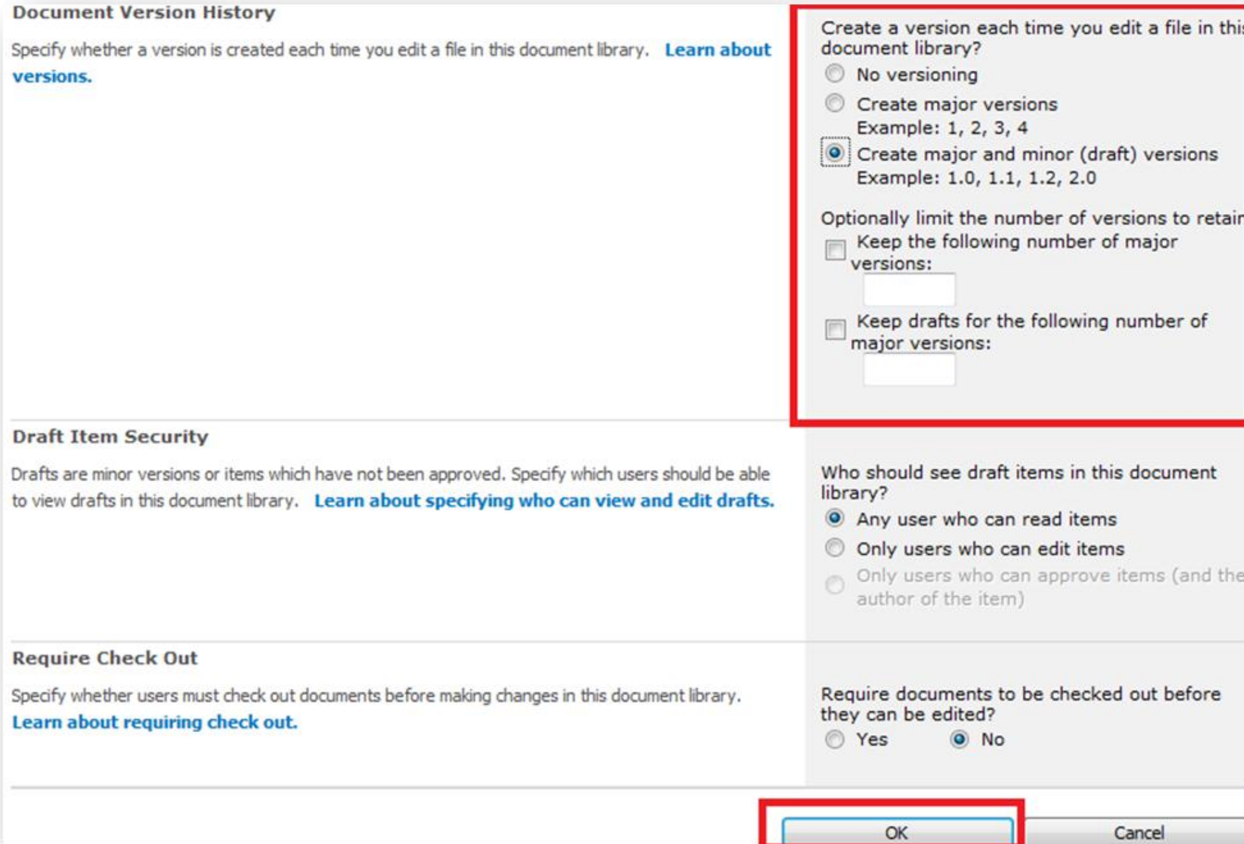
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to Set the Versioning (Products Document Library, in this case).
- From the ribbon control, Under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



- 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.).



- 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.).



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:

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

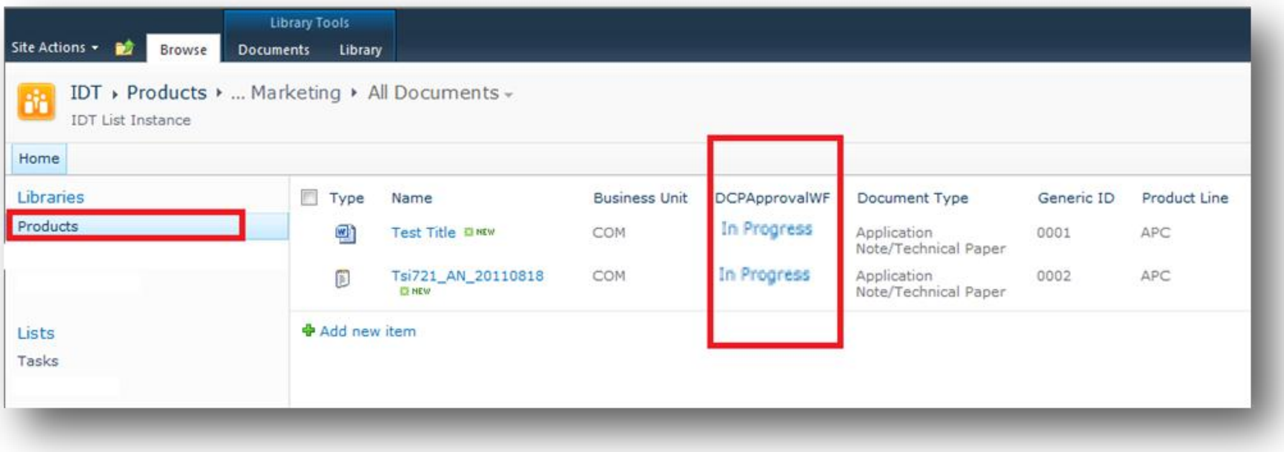
7.1 How to Approve/Reject/Reassign a document?

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

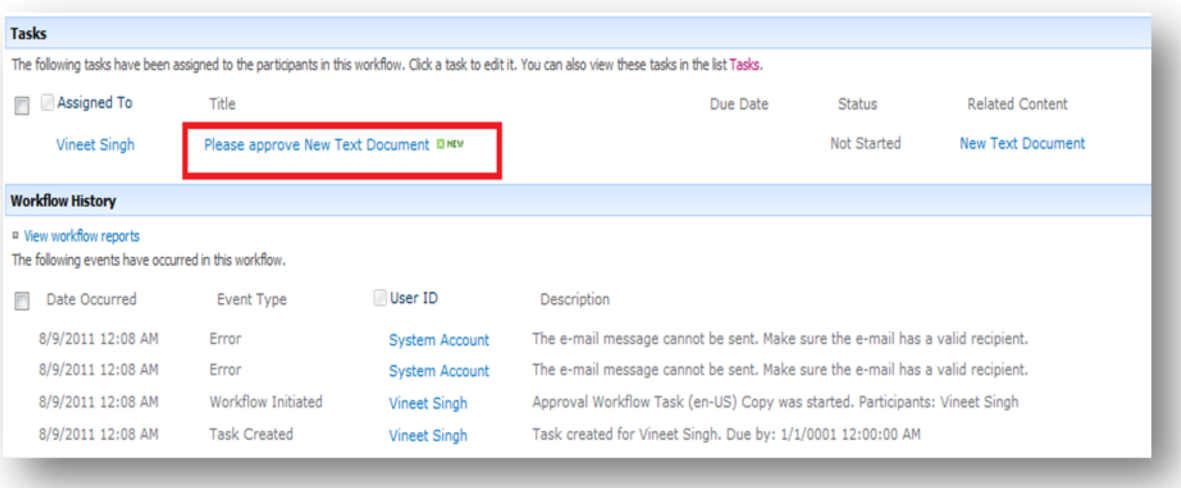
Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where our workflow is attached and documents needs to be Approved/Rejected (Products Document Library, in this case)

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

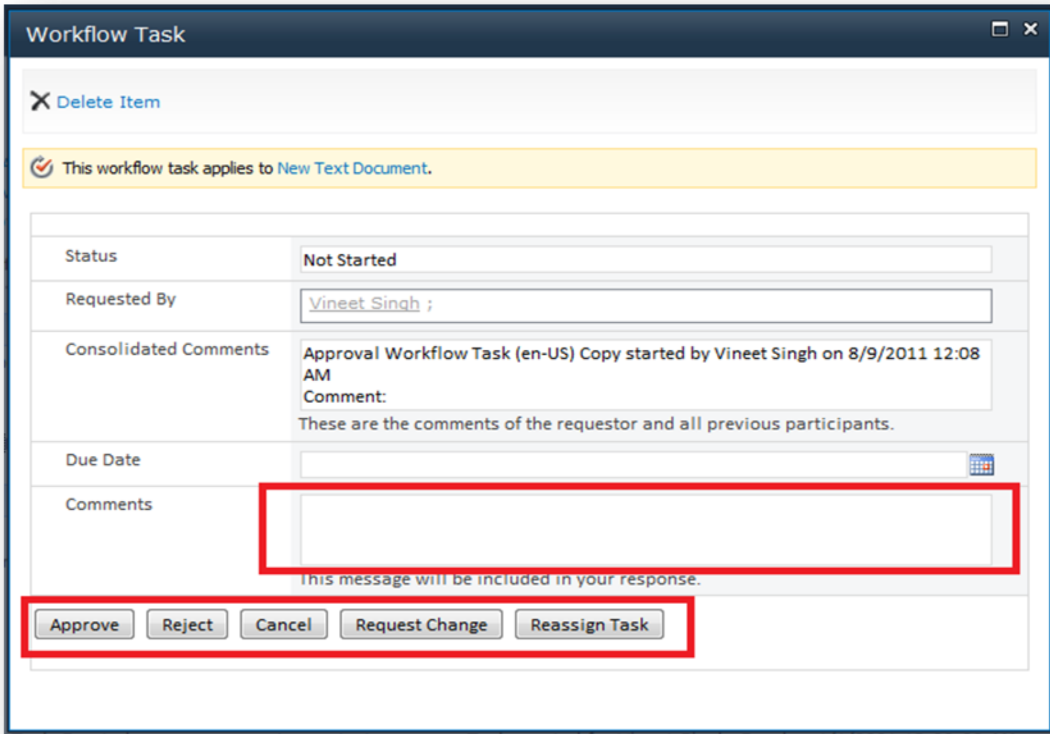
Click on the Workflow status link (Shown in fig below). DCPApprovalWF is the workflow instance name for the document library; it displays the present workflow status for the document.



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

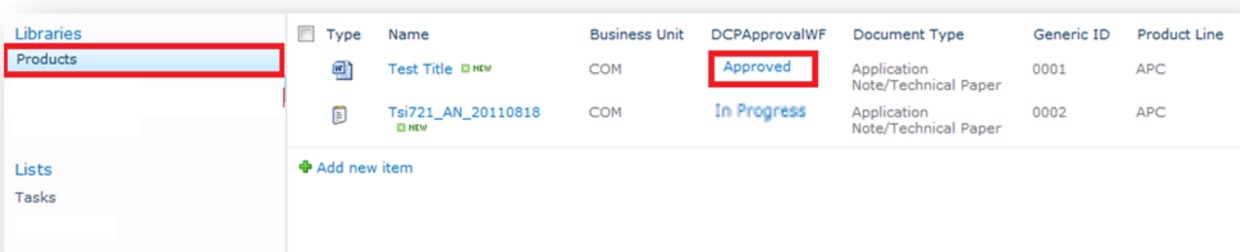


After click on the above mentioned link, again a new window would appear, where we will have the option of "***Approving***", "***Rejecting***", "***Reassigning***" and writing the comments (shown in below fig.).



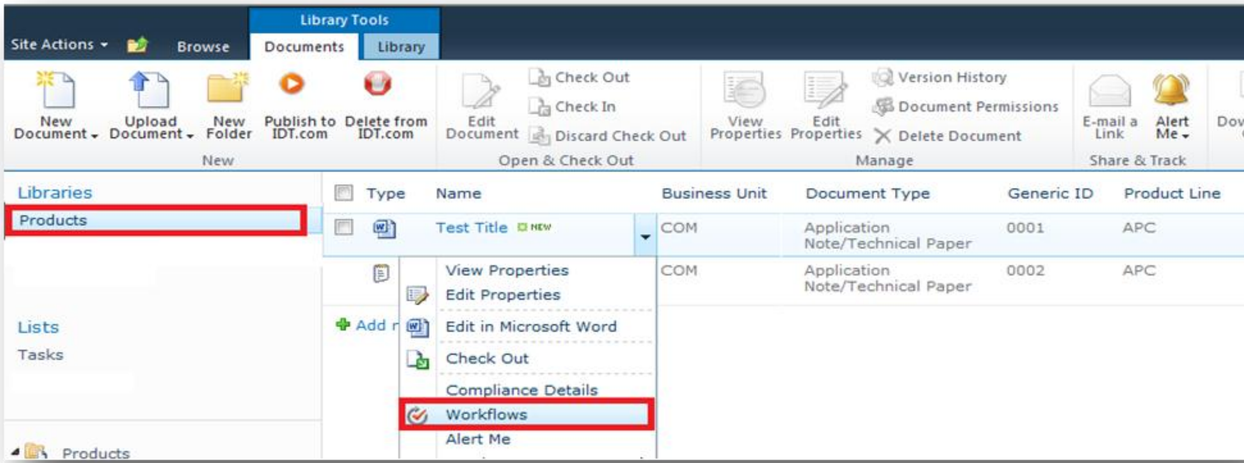
Fill the appropriate comment and "***Approve/Reject/Reassign"***based on requirement.

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

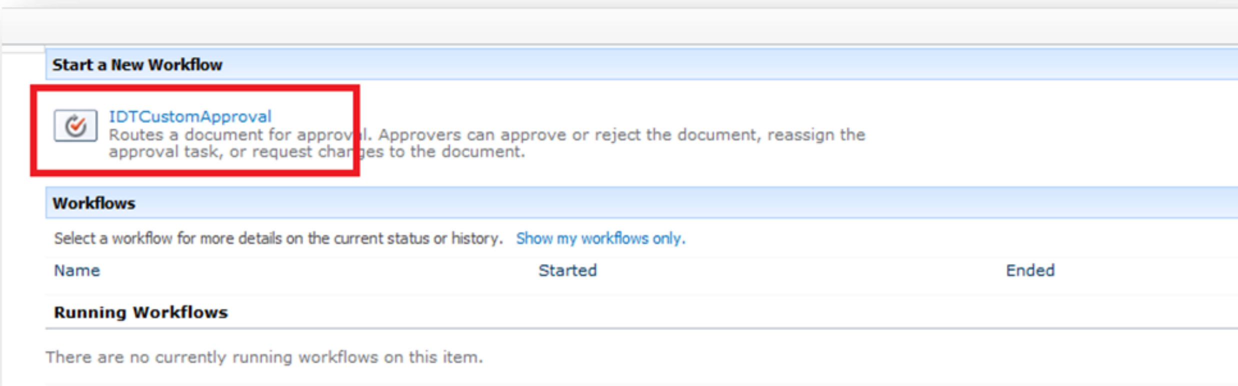


7.2 What to do when a document is rejected?

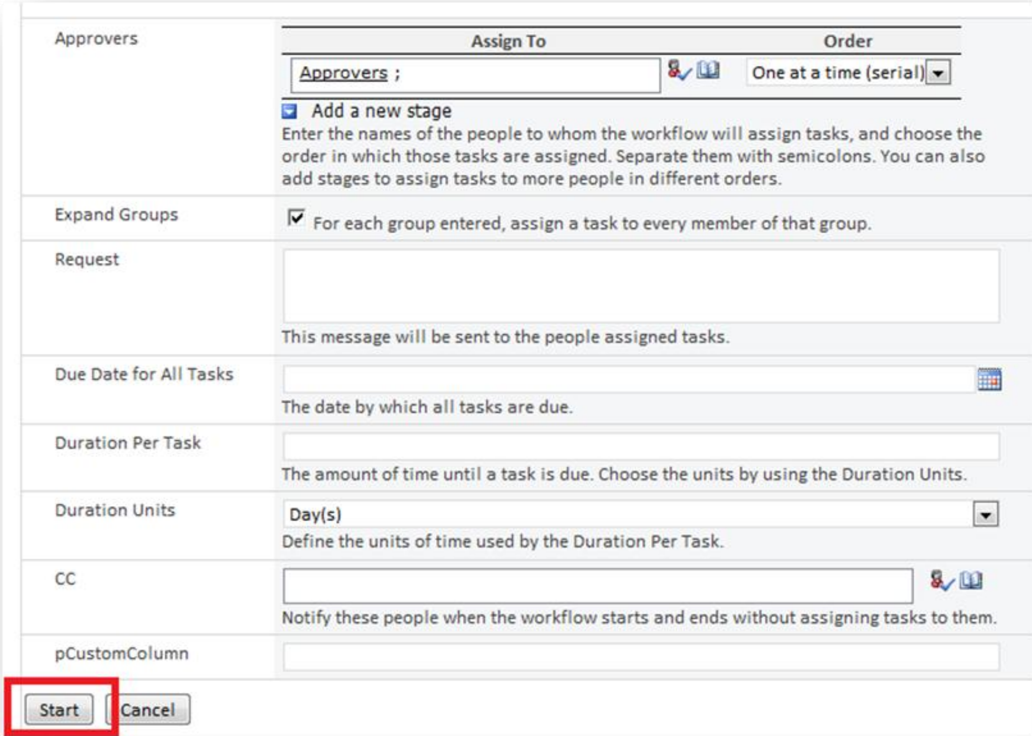
- A document once rejected could be again approved, for this click on click on the arrow button, present on the right side of the Name field, for the document for which we need to set the approval as workflow.
- A new popup will appear, select "***Workflows***" from the option.



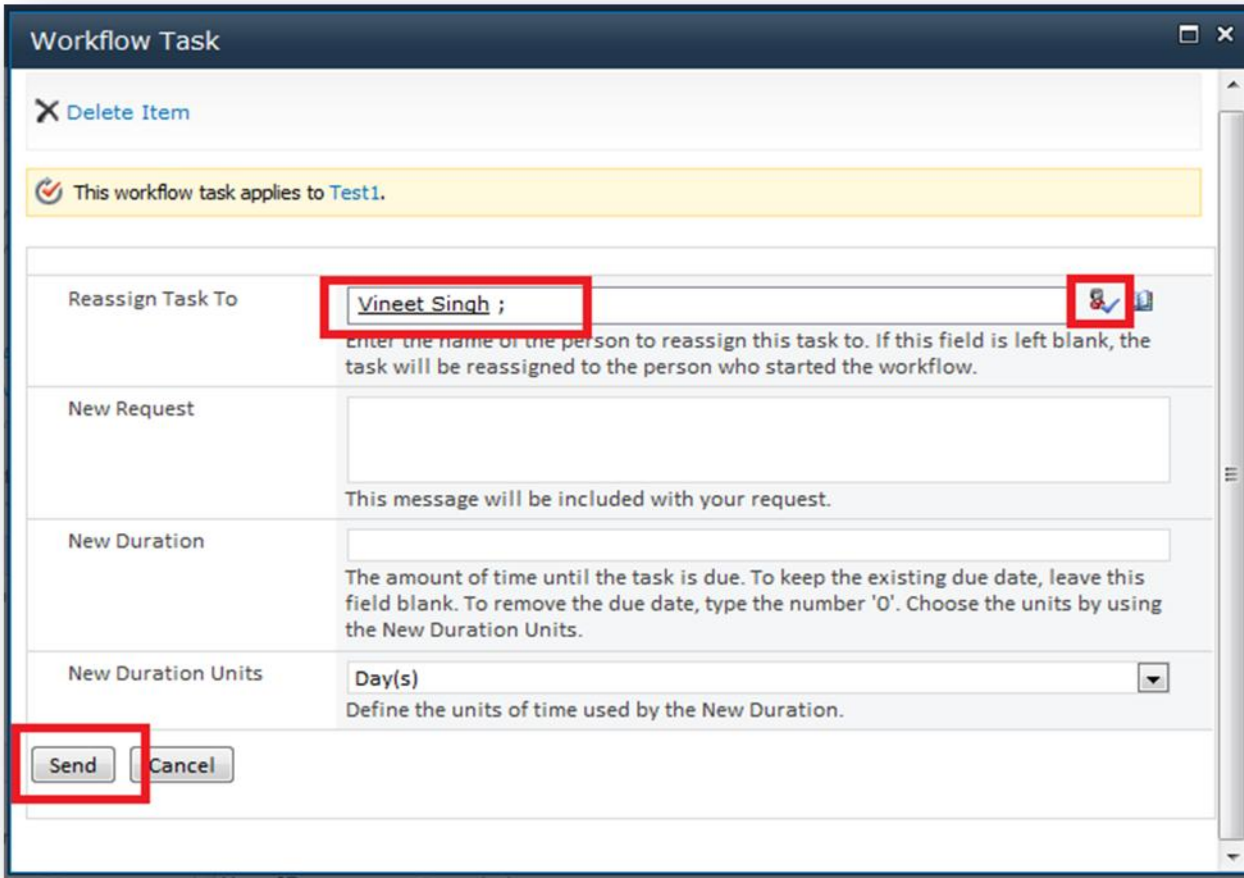
- On click of "***Workflows***" a new window would appear showing the workflow name on the top (shown in below fig.).
- Click on the workflow name to continue.



- 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.

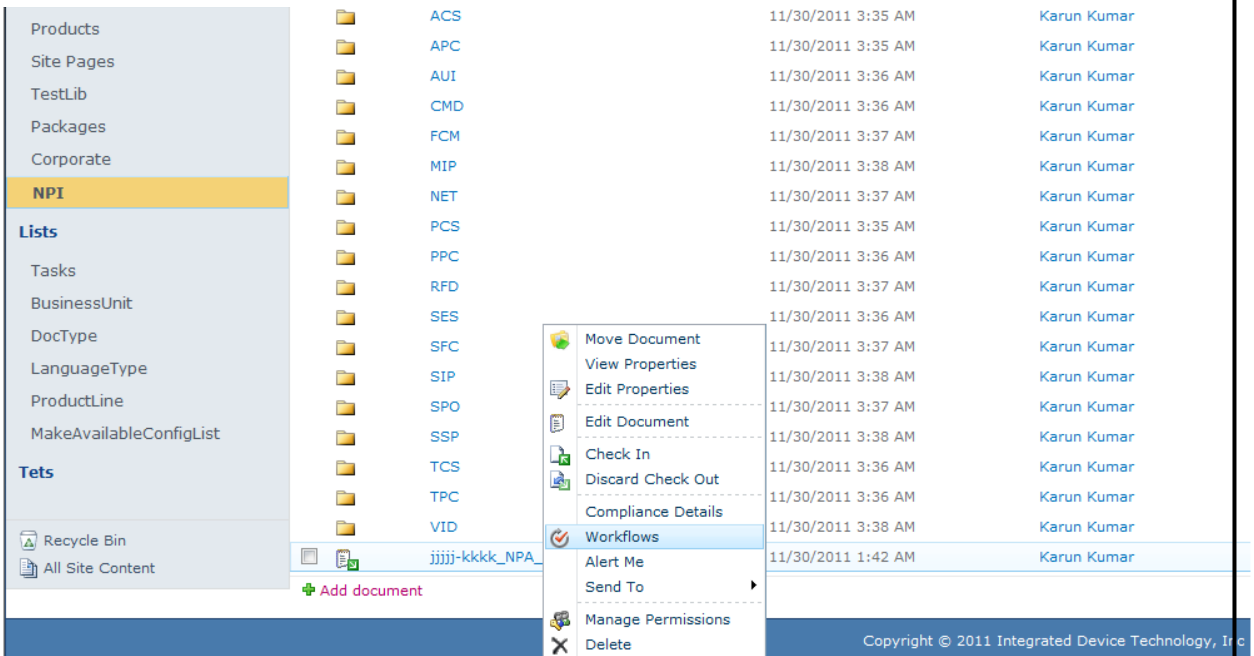


- If "***Reassign Task***" button is clicked, at the first place, a new window would appear (as shown in fig below)
- Enter the name of the person, to whom task has to be reassigned, fill the other values, relevant to us and then click on "***Send***" button to reassign the task.
- In case the document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

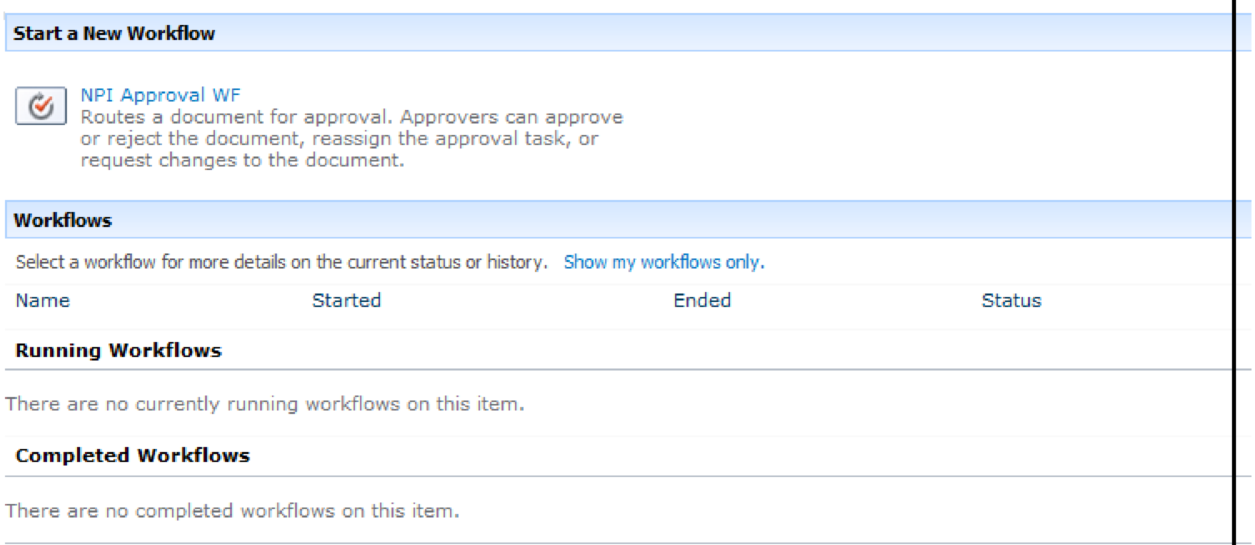


8 Start Workflows Manually

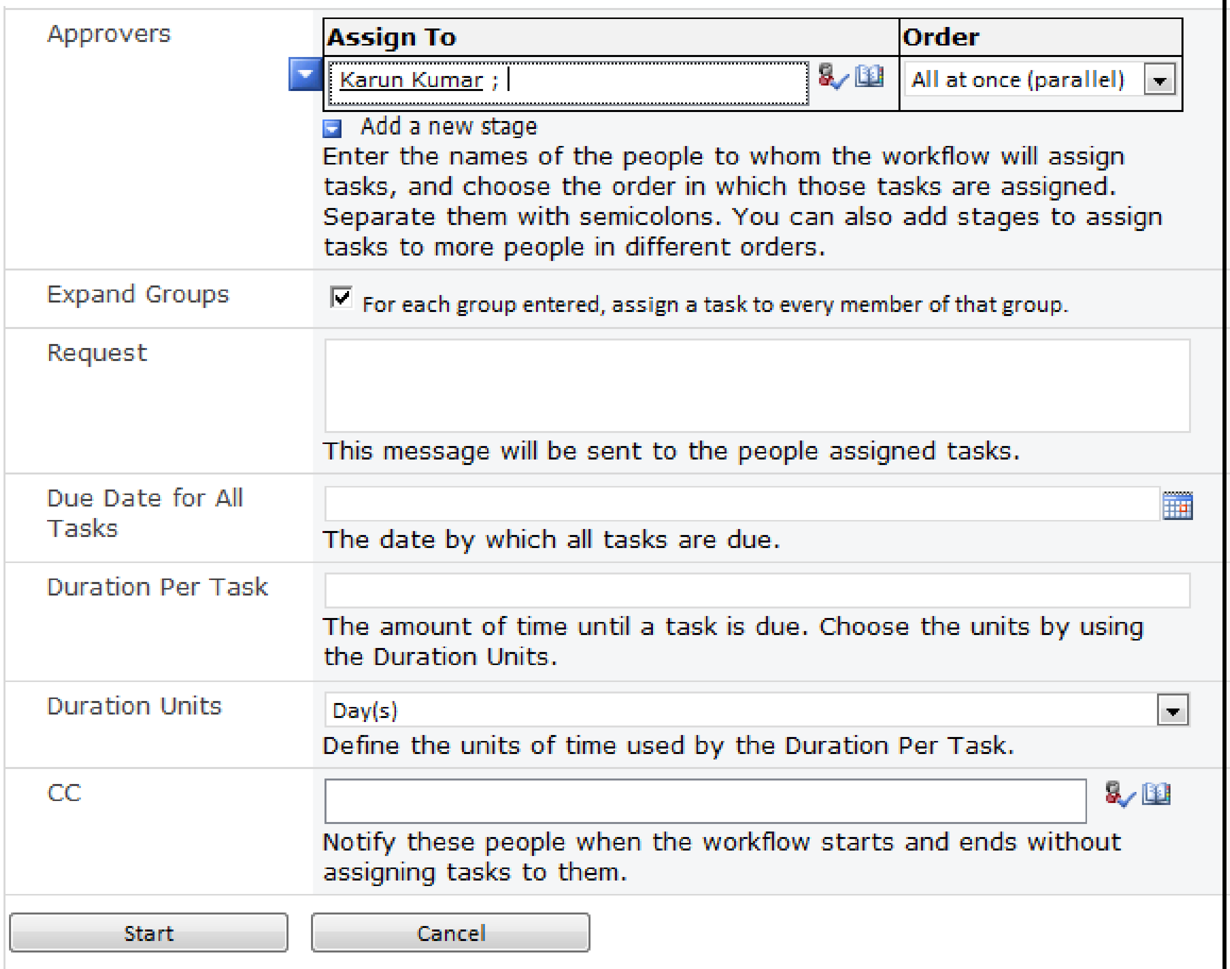
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to start the workflow.
- Click on the ECB Menu of the document on which workflow need to be started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



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



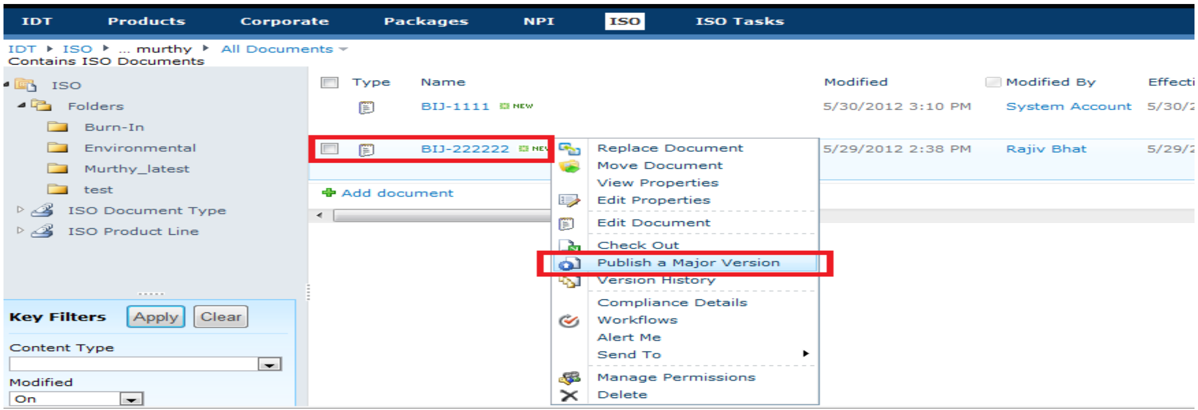
- Enter the person name as shown below who will have to approve the request.



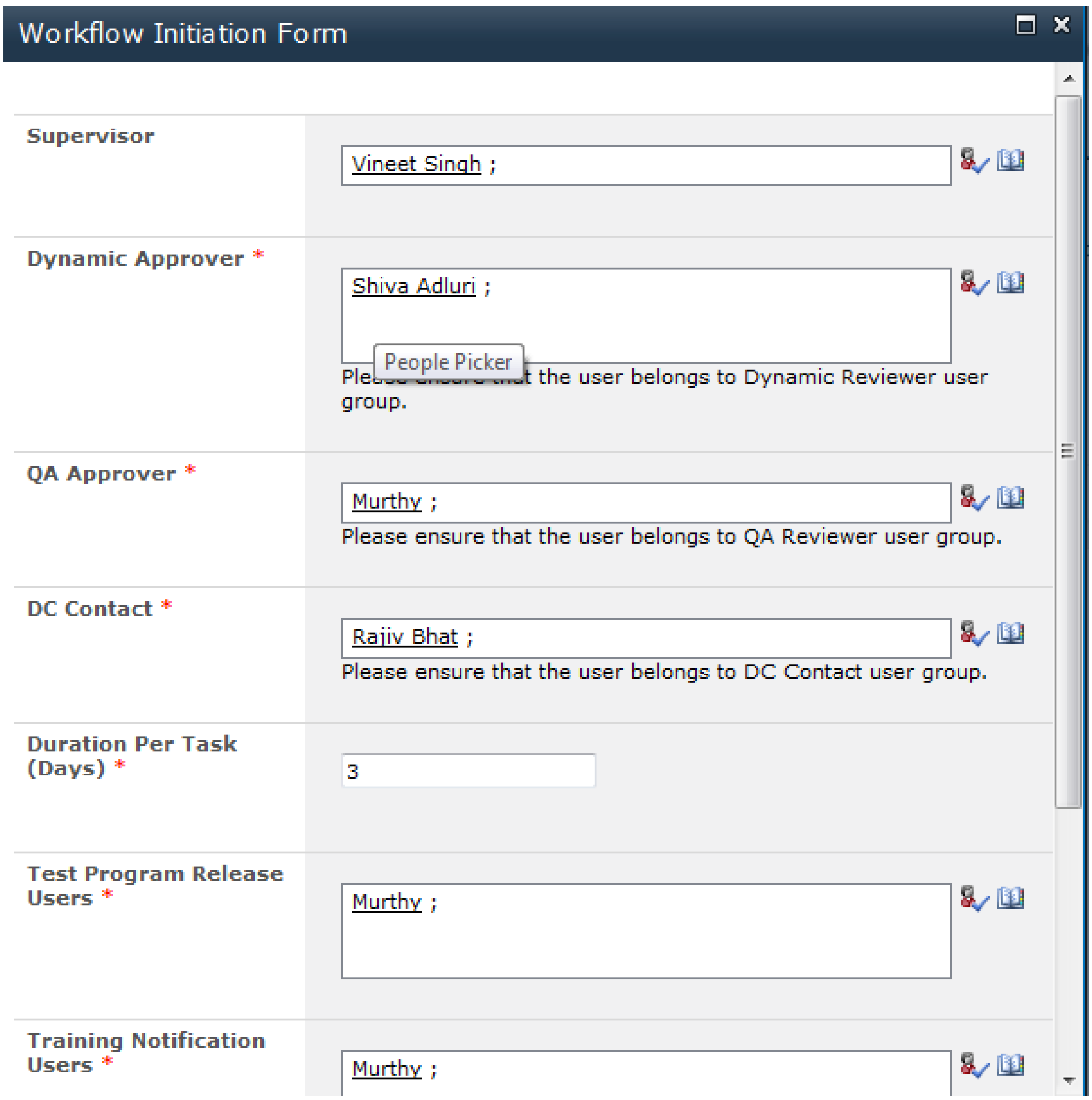
- Click ‘Start’ after filling the required information.

9 Starting ISO Approval Workflow

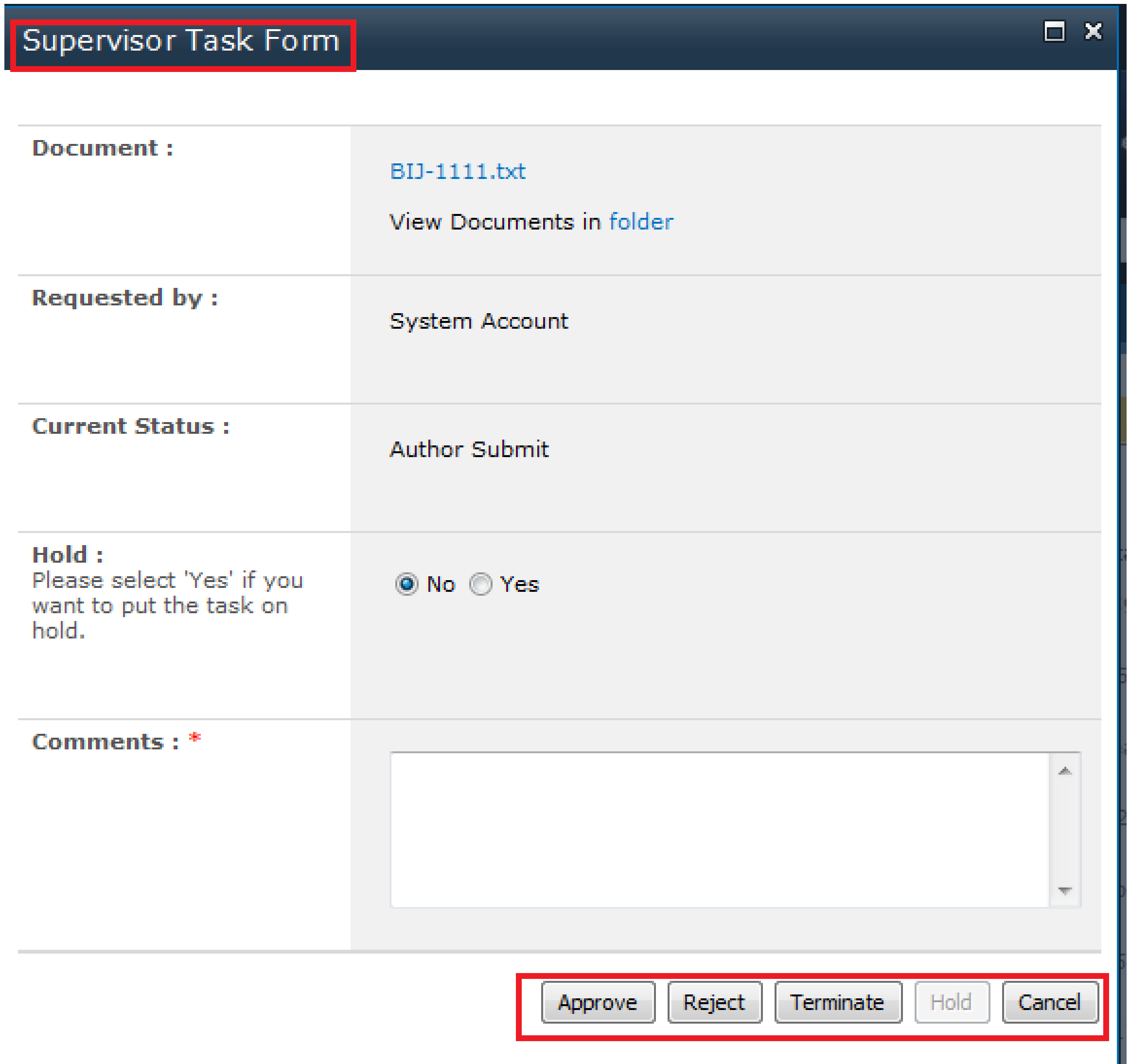
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the ISO Document Library, present on the top.
- Upload a document to any of the folders in the library.
- Name the file based on filename nomenclature.
- To Start ISO Approval WF Click on ’Publish a Major Version’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



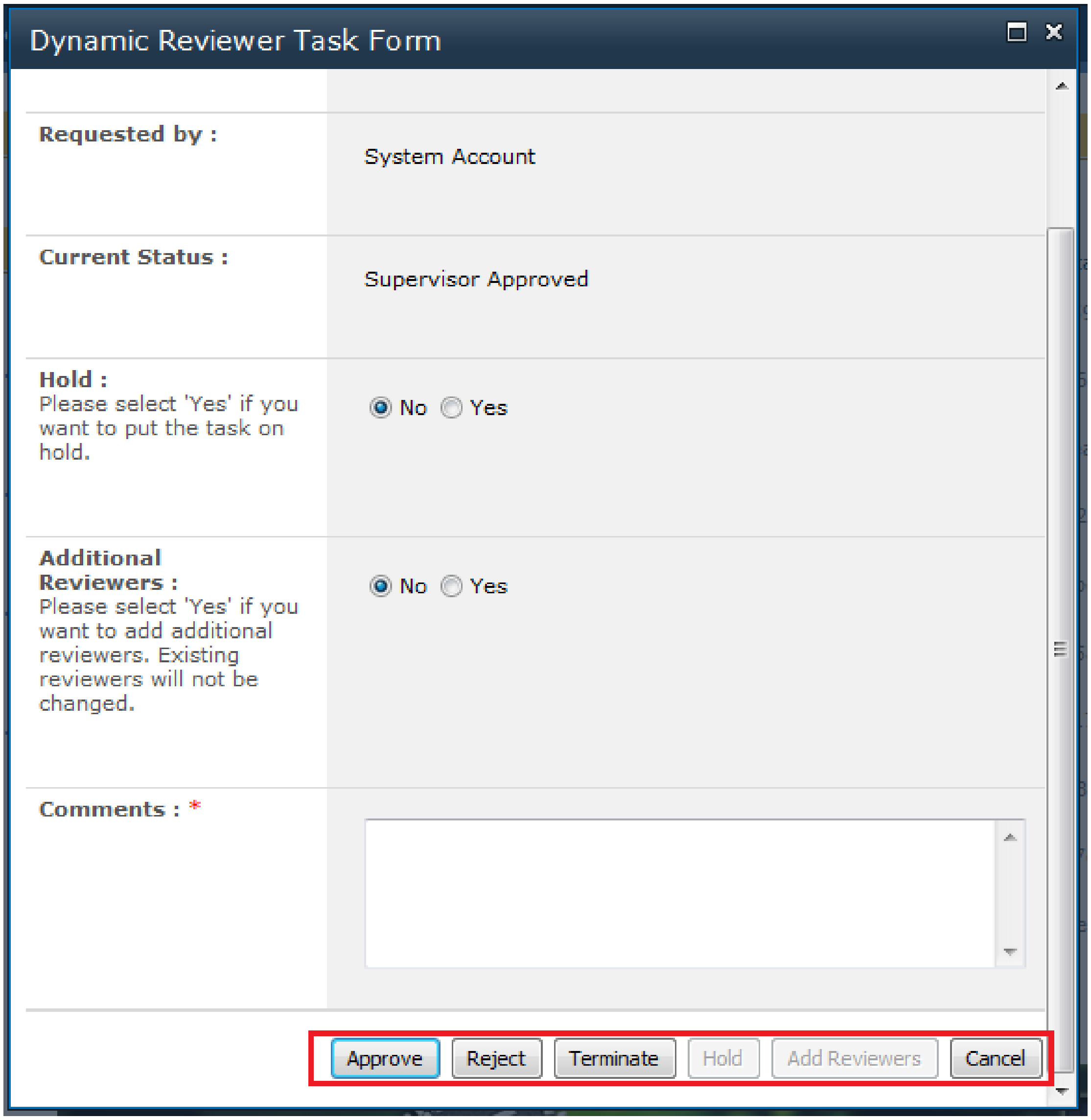
- Fill the details in the initiation workflow as required and click ‘Start’.



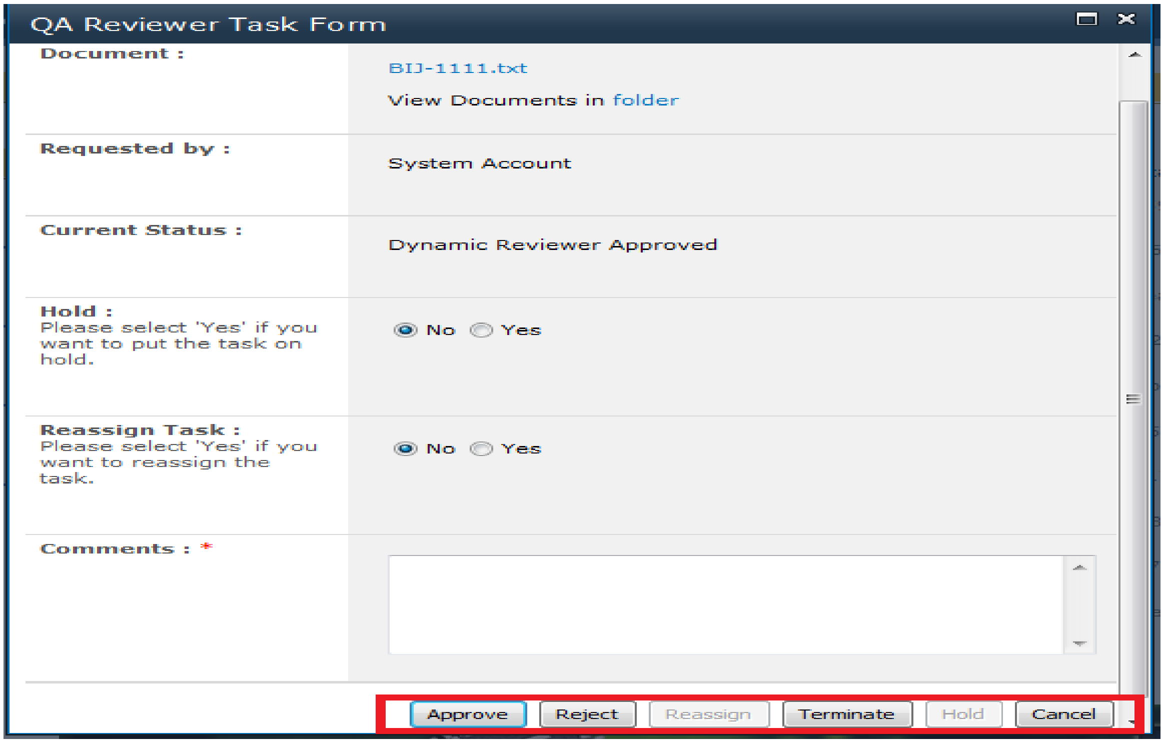
- Since Supervisor field is optional, if user specifies Supervisor in initiation form task gets created to Supervisor otherwise task gets created to Dynamic Reviewers.



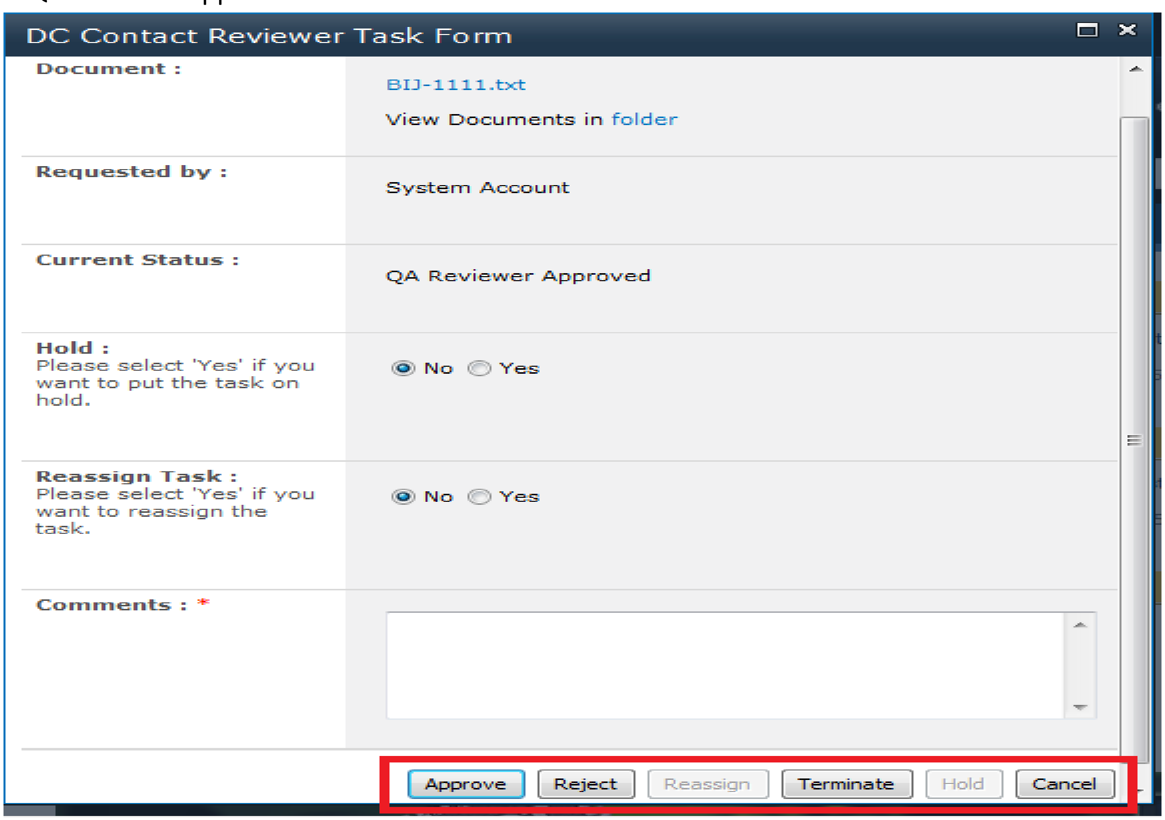
- If task is created for supervisor and if the reviewer approves, then workflow moves ahead and creates tasks to dynamic reviewers.



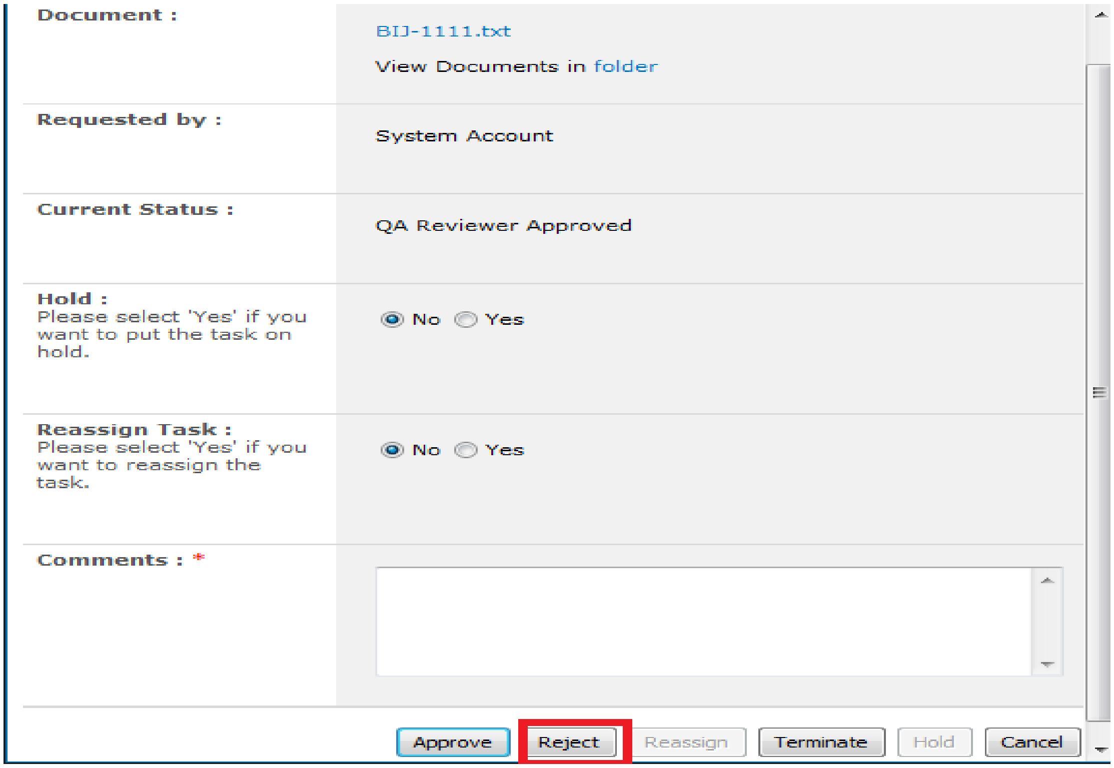
- If all the dynamic reviewers approve then the workflow moves ahead and create task to QA Reviewer.



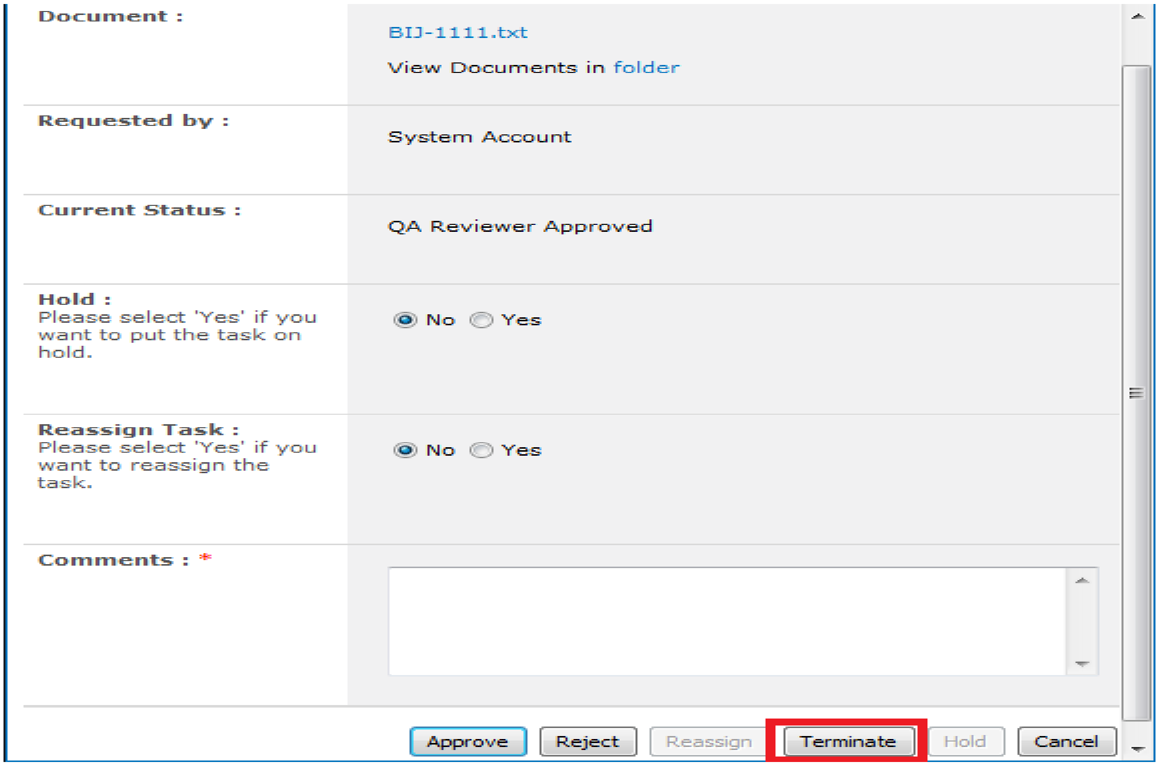
- If QA Reviewer approves the workflow moves ahead and create task to DC Contact.



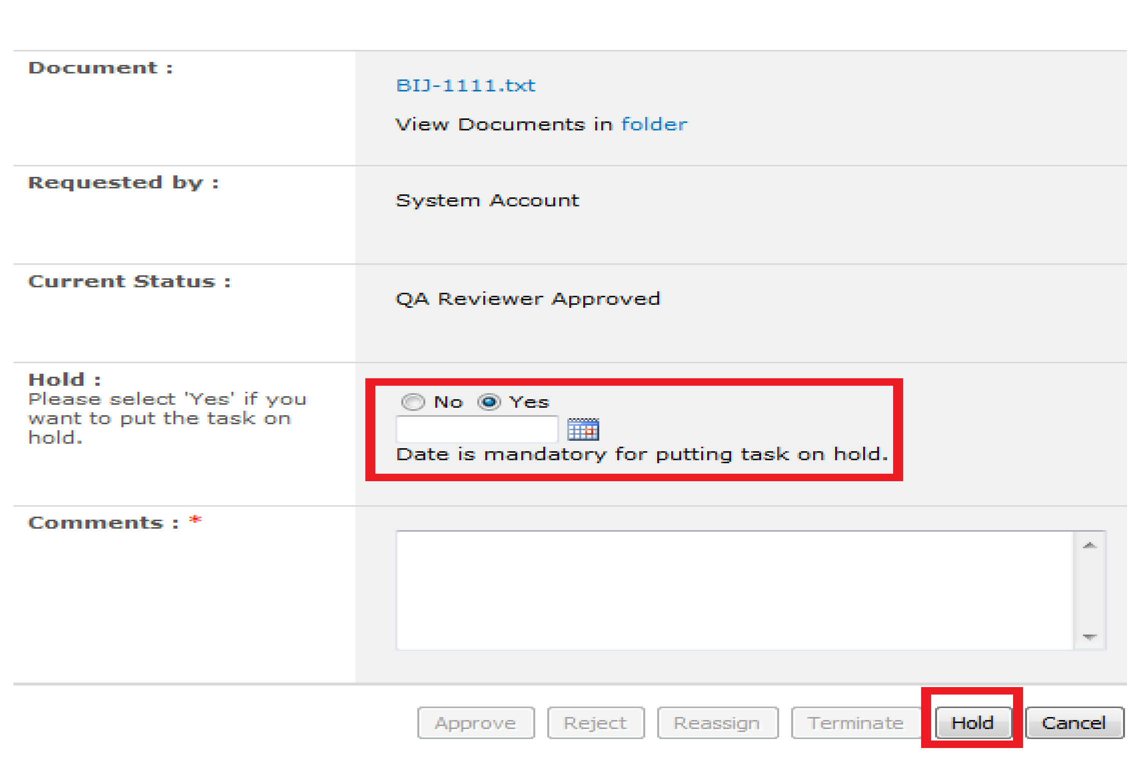
- If DC Contact approves workflow gets completed and starts two workflows named TestProgramWF and TrainingNotificationWF.
- If at any stage if any of the reviewers click on reject in the task form then workflow gets terminated.



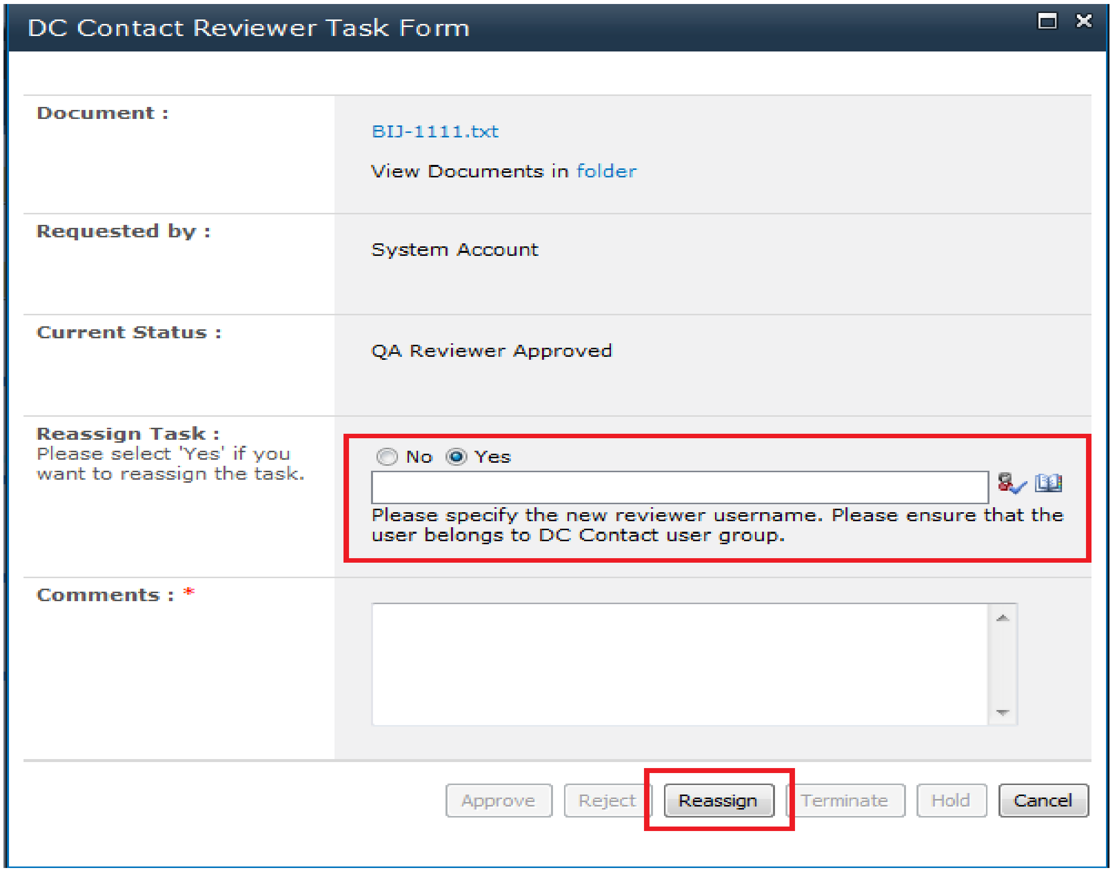
- Similarly if at any stage if any of the reviewers click on terminate in the task form then workflow gets terminated.



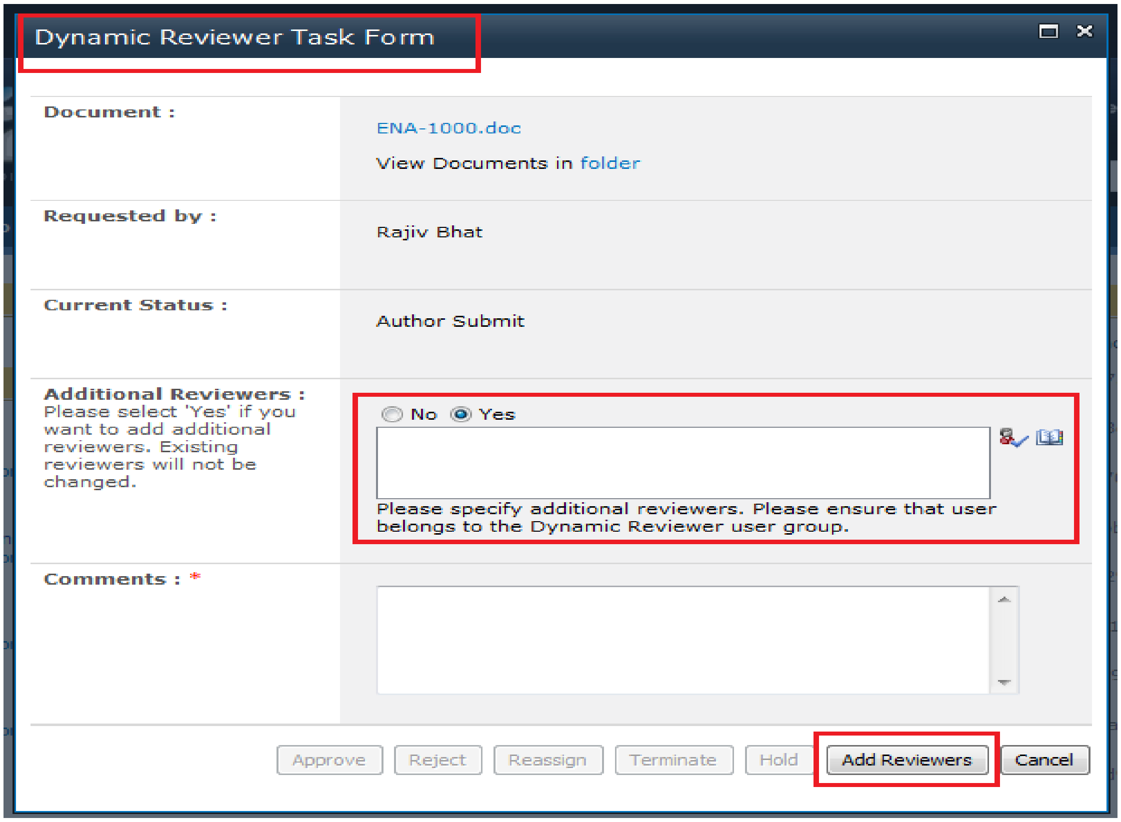
- On Hold option is available only once per tasks life time. If user selects a hold date and clicks on Hold the task will be held till the due date without any escalation.



- 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.



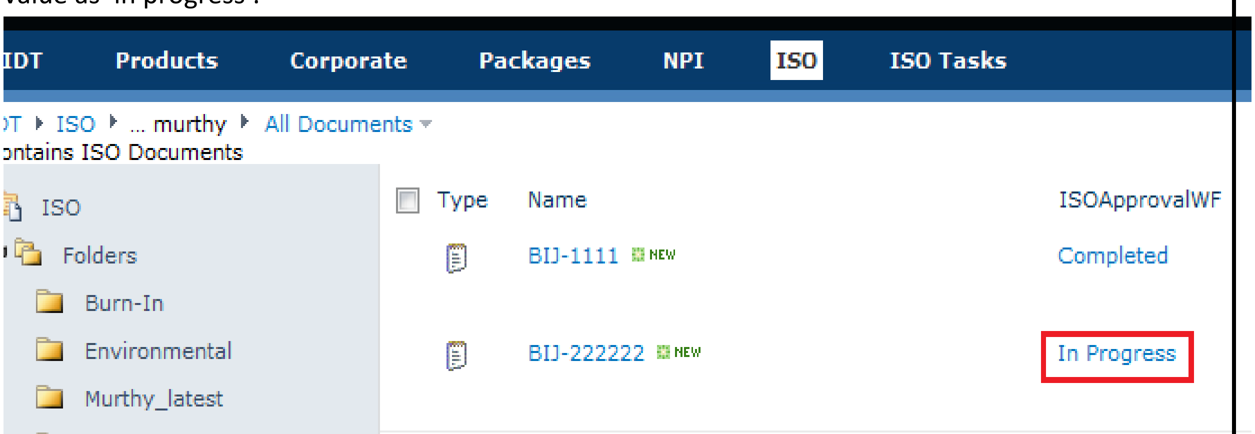
- If user clicks on Add Additional Reviewers after they select the reviewers from their group tasks will be created for the newly added reviewers. Due date for these tasks will be created based on the workflow association form data information. This option to Add Additional reviewers is available only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



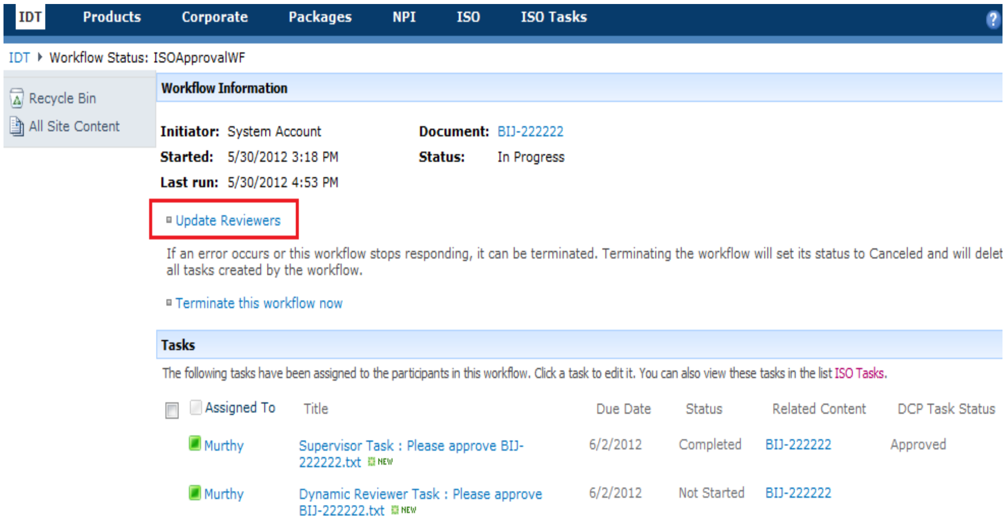
- Close option is provided to close the form without recording the decision.
- Emails will be sent accordingly and workflow history logs are created.

9.1 Updating Reviewers from workflow status page.

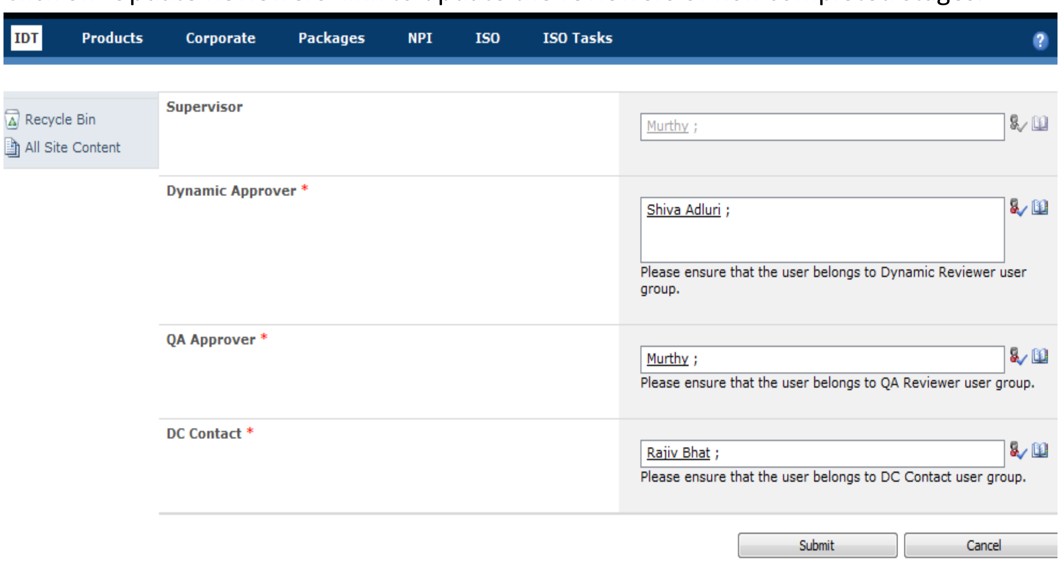
- After the approval workflow started there will be a field ISOApprovalWF which shows the value as ‘in progress’.



- Click on the ‘in progress’ value which redirects to the workflow status page.



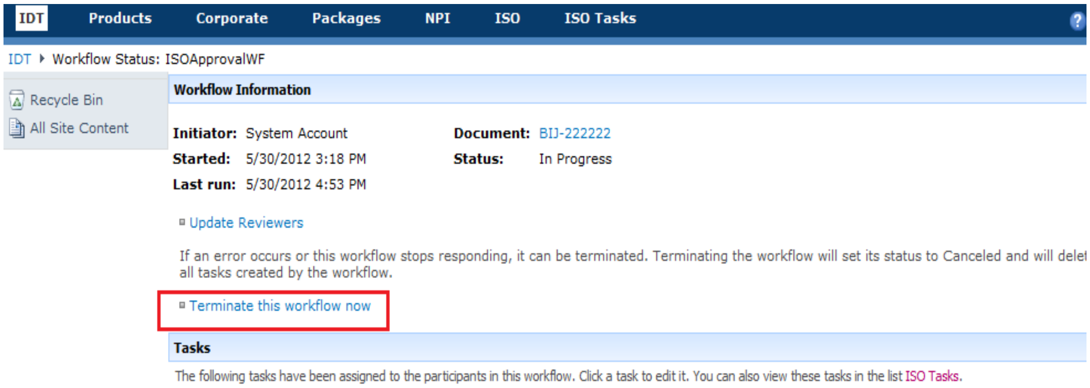
- Click on ‘Update Reviewers’ link to update the reviewers of non completed stages.



- 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.



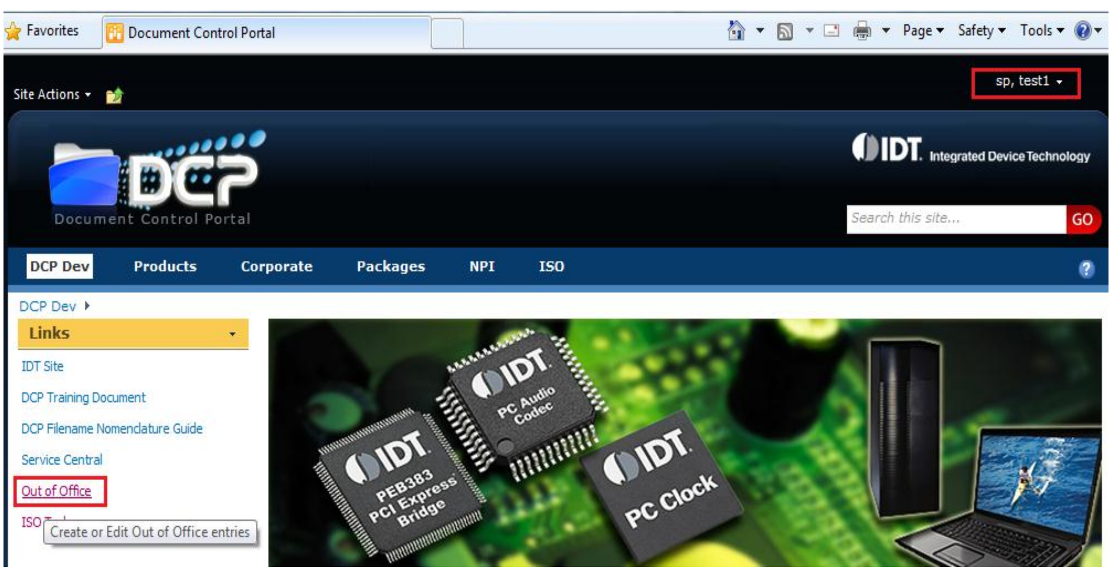
- This will delete all the tasks irrespective of the task status.
- Similarly when a document is checked-out after the approval workflow is started all the tasks will be deleted.

10 Escalation Timer

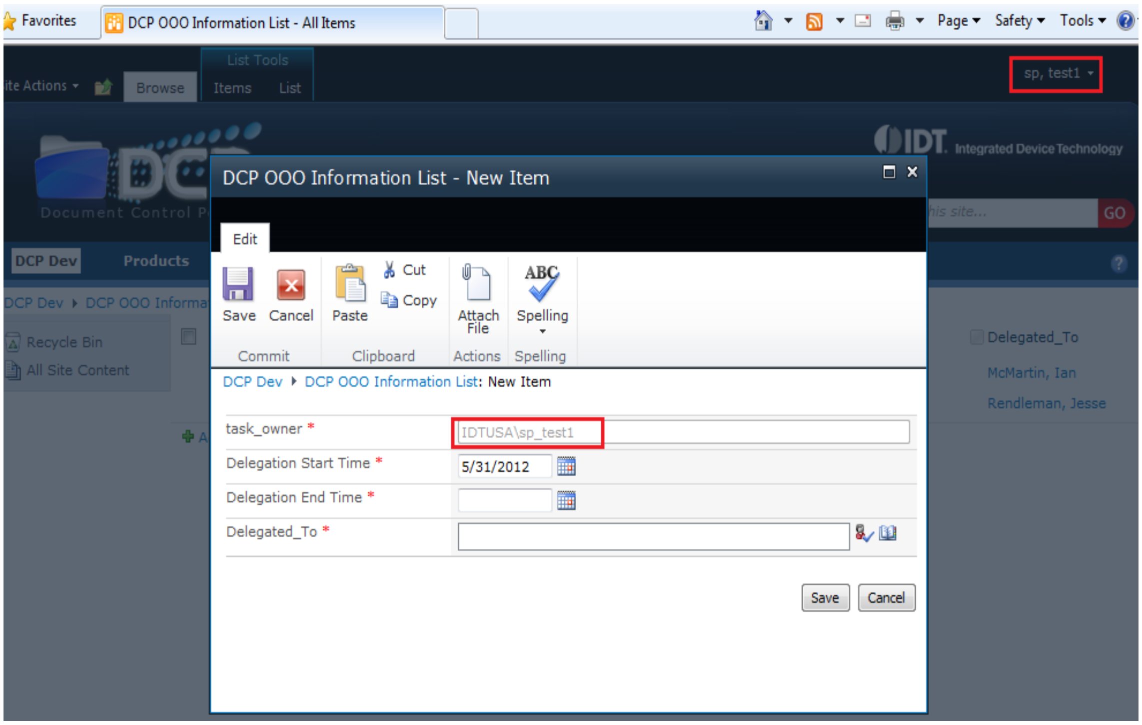
- All the tasks that are created in the ISO Tasks list are monitored by a Timer.
- If the Task due date is completed and no action is taken email reminders will be sent to the task owners and a copy is sent to the author of the document.
- First level reminder emails are sent as per the information configured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



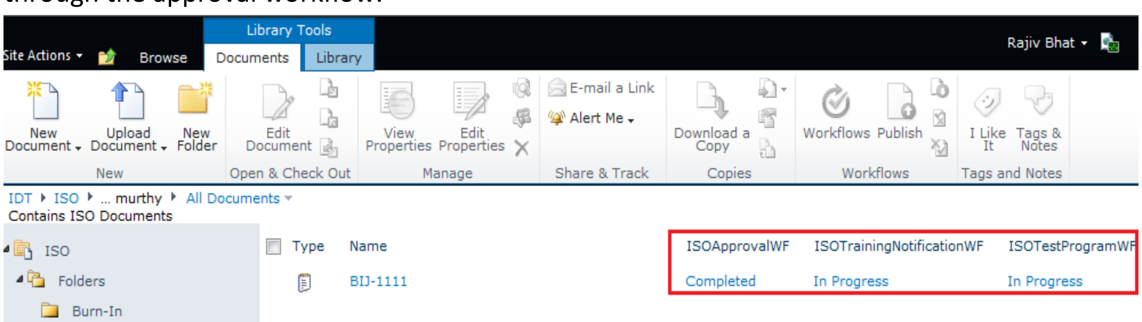
- Accordingly whenever a task is to be created for the user who delegated the task will be created to the delegated user from the date which falls in between the delegation start date and delegation end date.
- "Task owner" is auto populated and hence cannot be edited. User can create his own OOO only



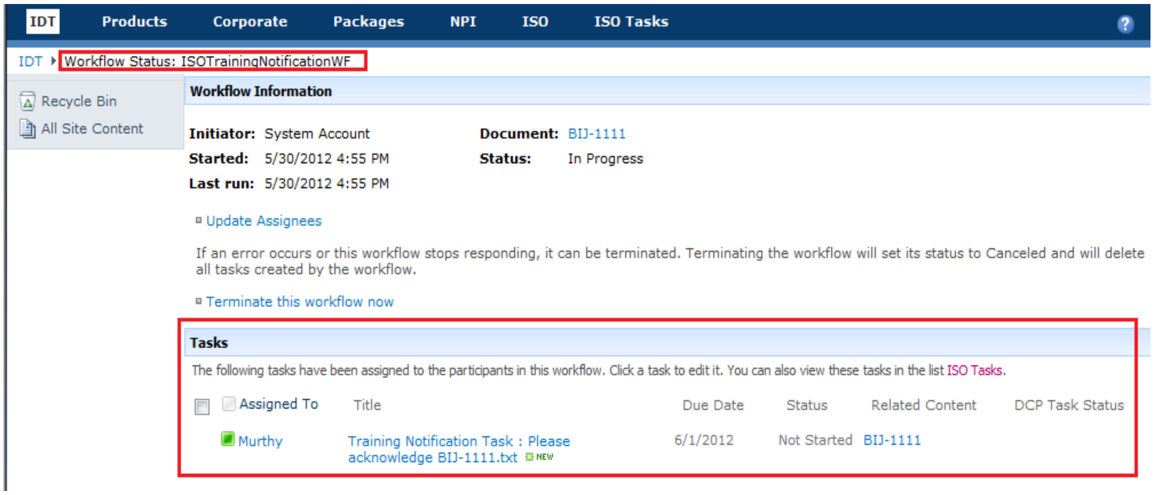
- One user can do one entry only. But user can edit the start date and end date.

12 Starting Test Program Workflow and Training Notification Workflow

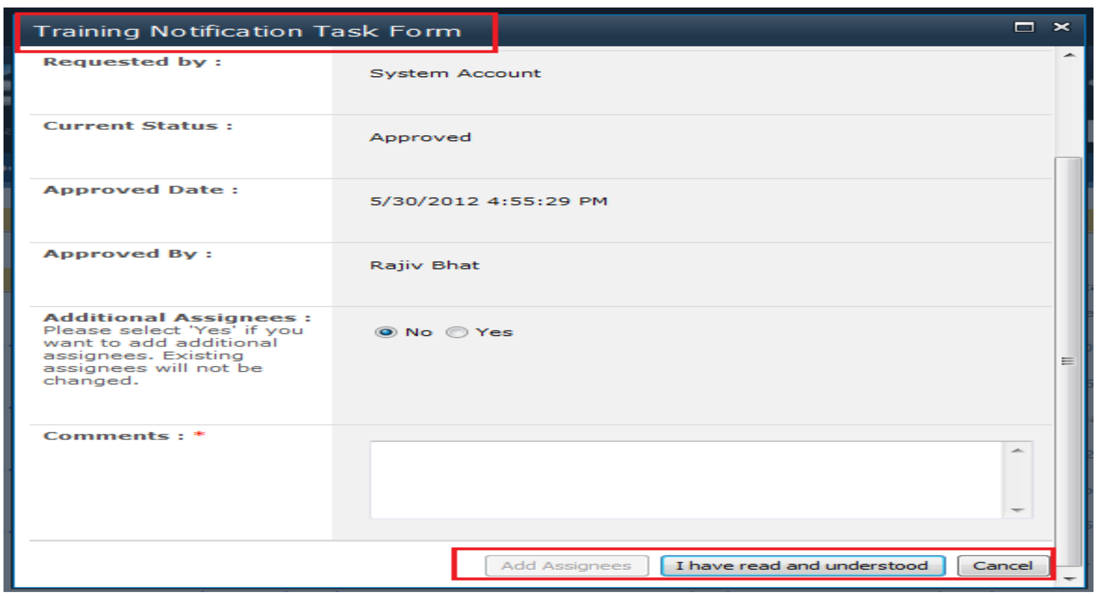
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the ISO Document Library, present on the top.
- These workflows will be started automatically after the document is approved/published through the approval workflow.



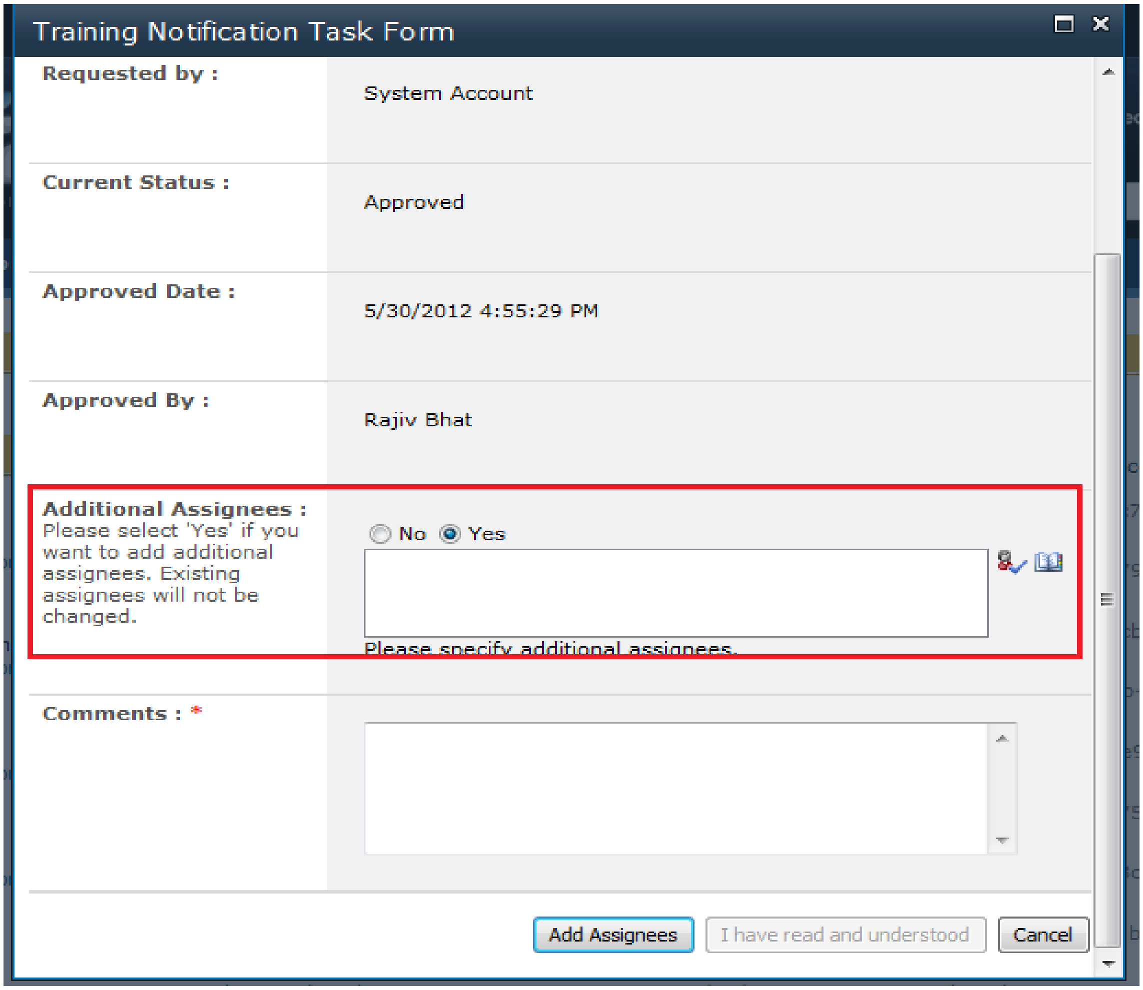
- Assignees information is recorded initially using the initiation form of ISOApprovalWF.
- Tasks will be created for Test Program Assignees and Training Notification Assignees.



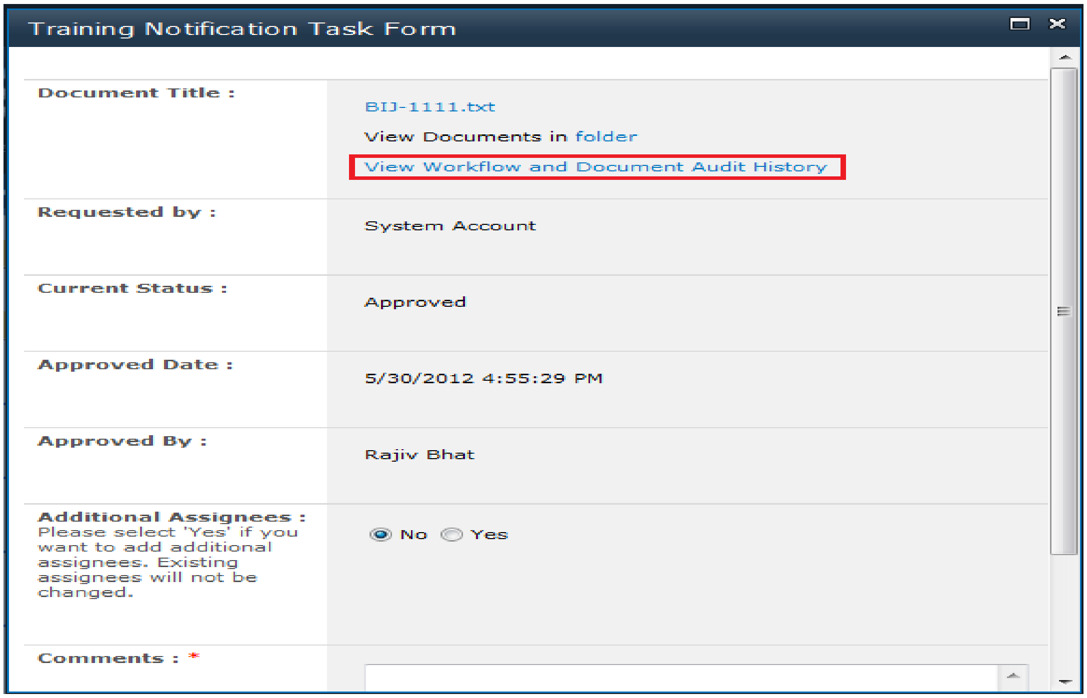
- If all these assignees click on 'I have read and understood' option these workflows gets completed.



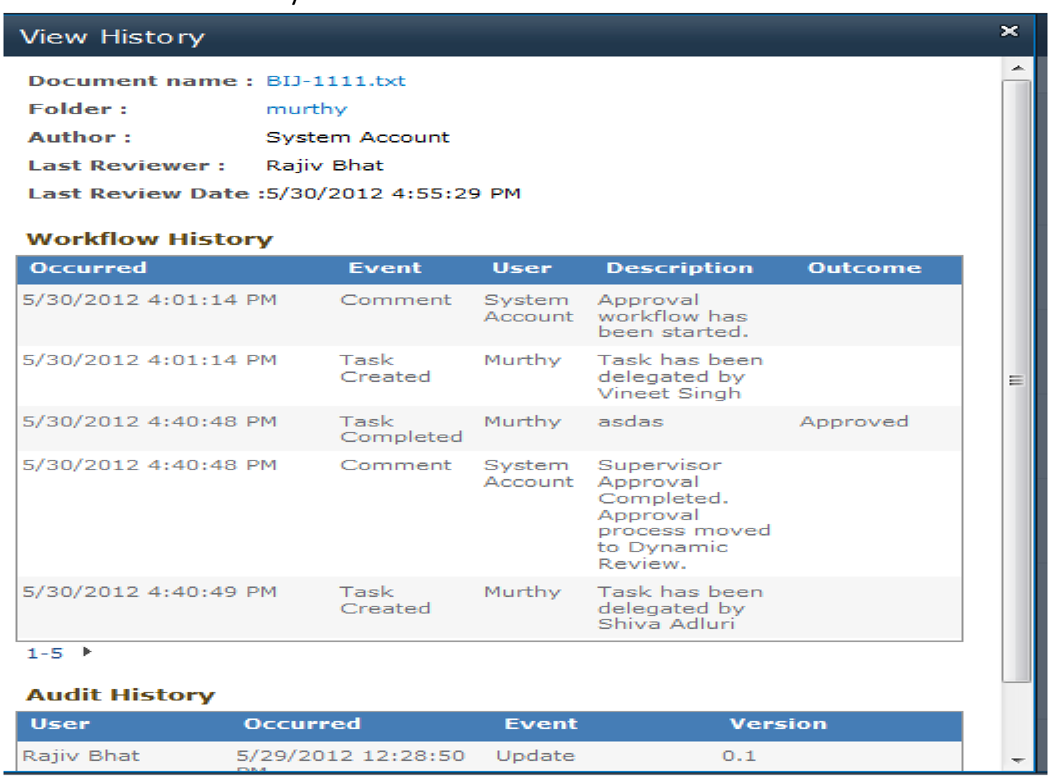
- If user clicks on Add Additional Assignees after they select the assignees from their group, tasks will be created for the newly added assignees. Due date for these tasks will be created based on the workflow association form data information.



- 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'.



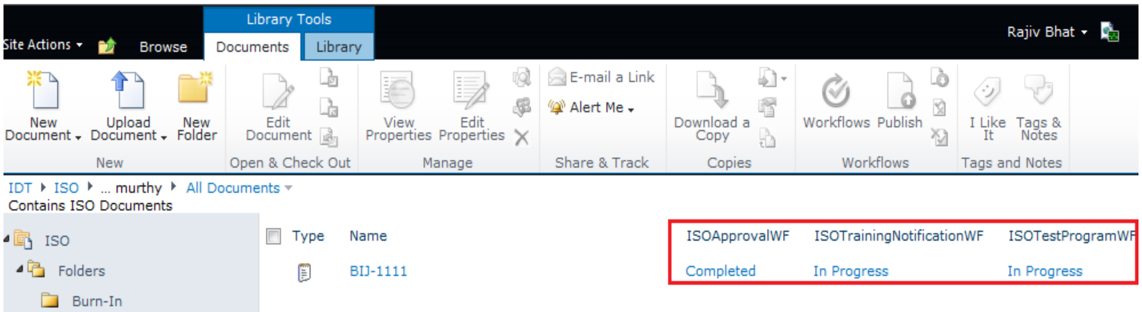
- Workflow history will be the approval workflow history and audit history will be the document's audit history.



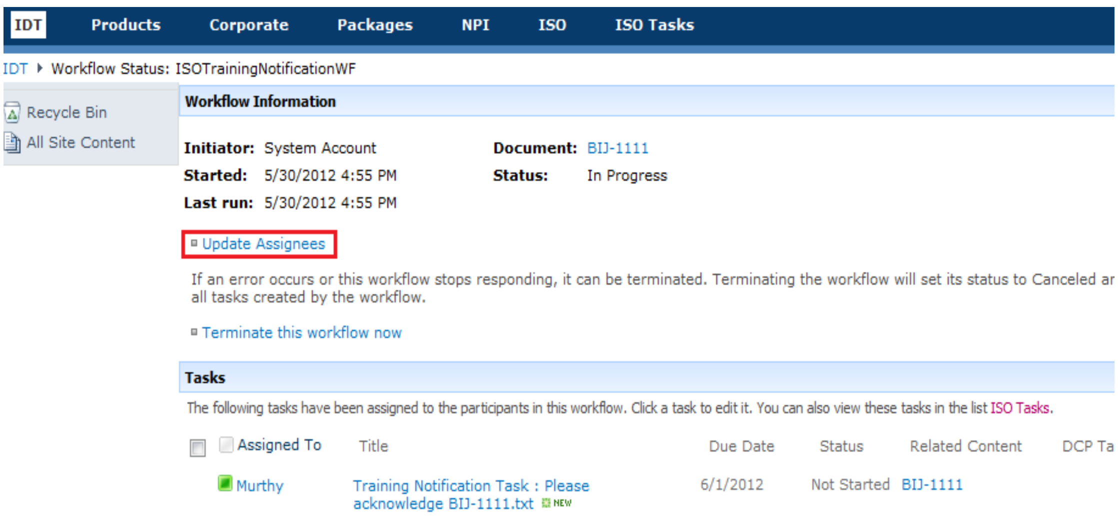
- Emails will be sent accordingly and workflow history logs are created.

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’.



- Click on the ‘in progress’ value which redirects to their respective workflow status page.

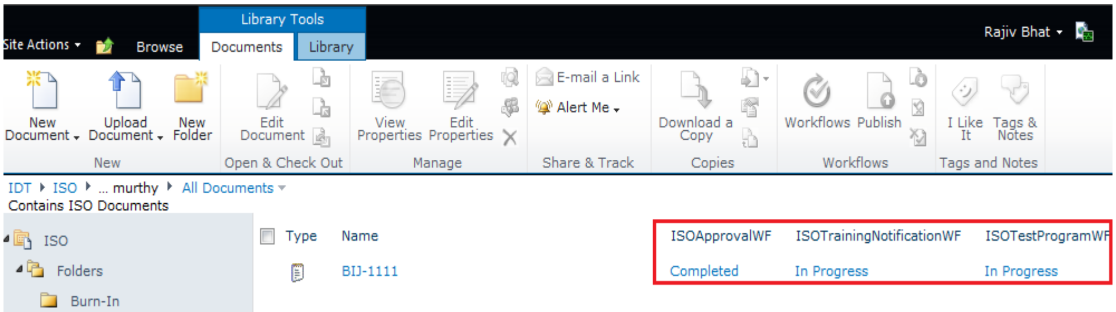


- Click on ‘Update Assignees’ link to update the assignees if the workflow is not completed.

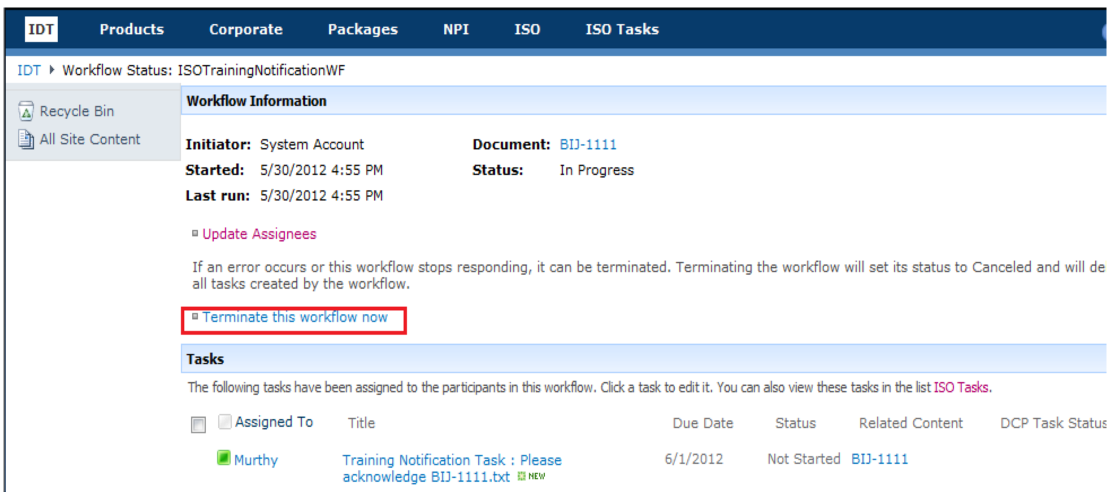
- Assignees who completed their tasks cannot be deleted.
- Emails will be sent accordingly and workflow history logs are created.

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’.



- Click on the ‘in progress’ value which redirects to their respective workflow status page.

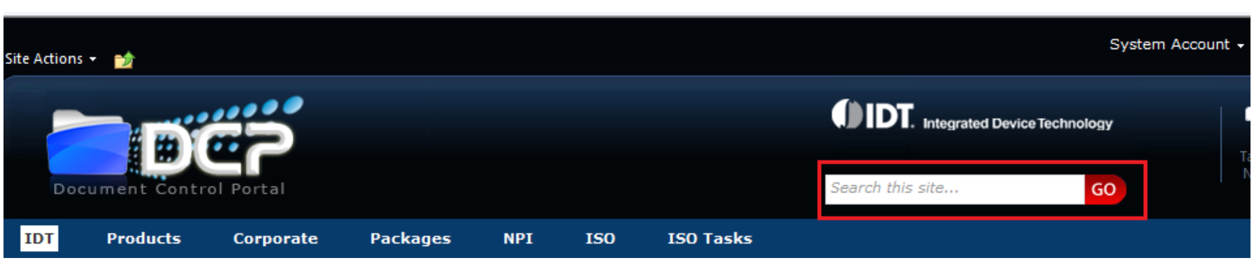


- Click on ‘Terminate this workflow now’ link to terminate the workflow.
- This will delete all the tasks irrespective of the task status

13 Search

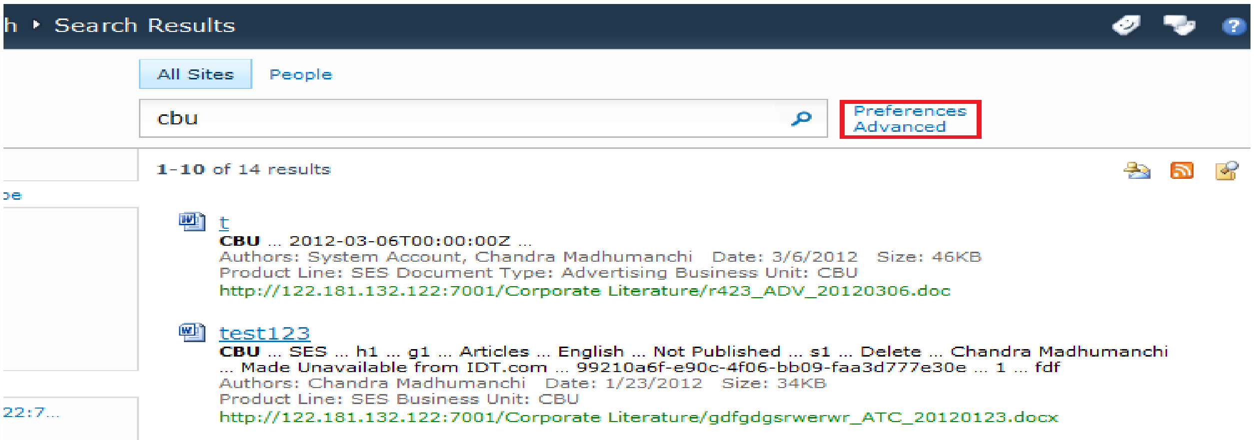
13.1 Keyword Search

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

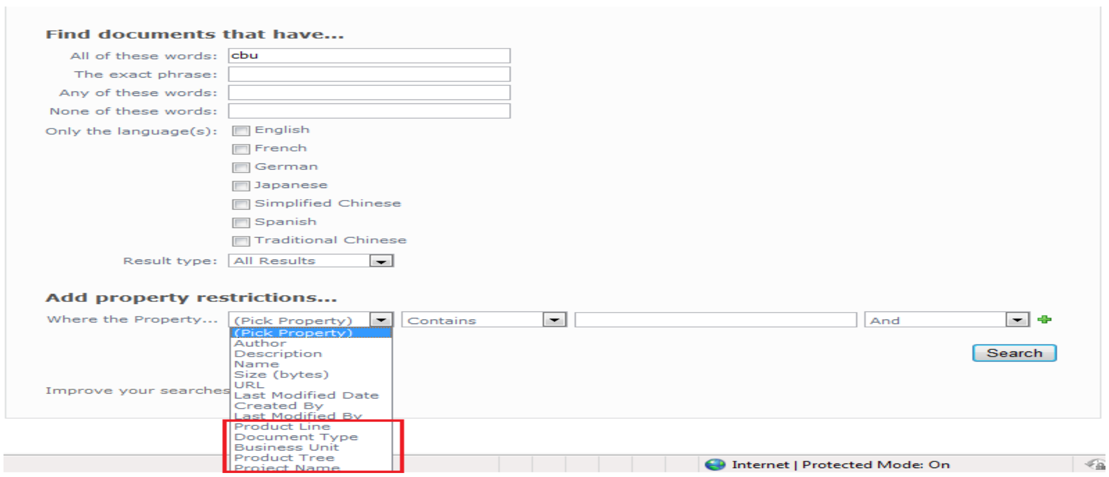


13.2 Advance Search

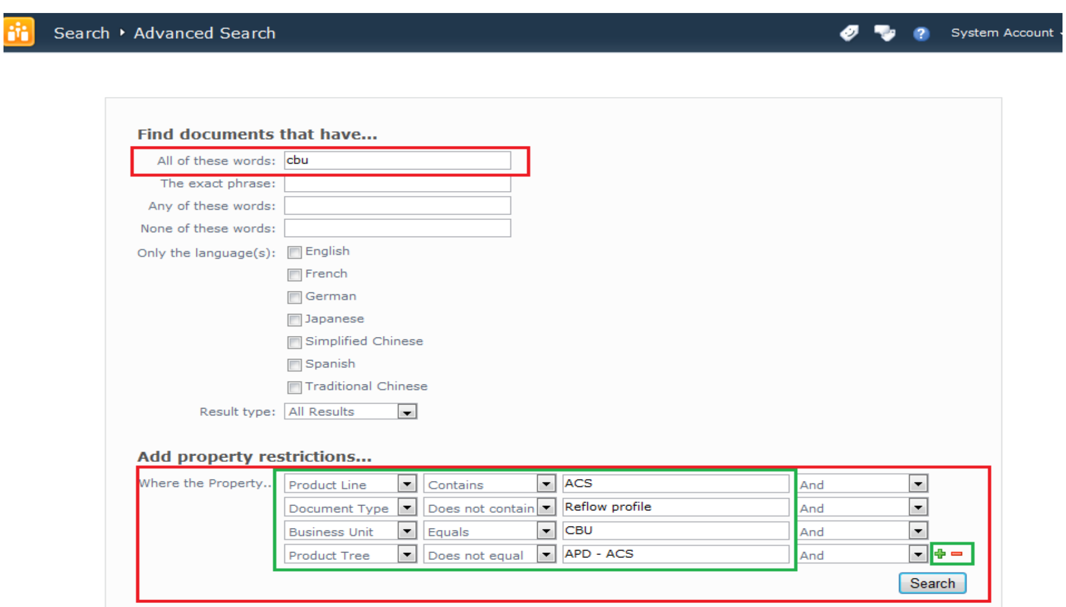
Advance search will be accessible from the Search Results page by clicking below highlighted link:



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

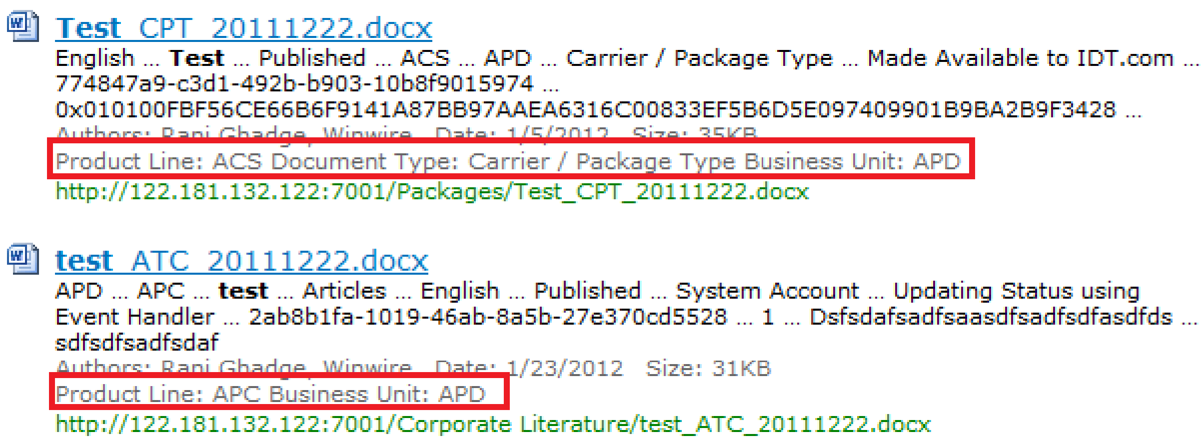


Users can choose to add multiple property restrictions using "+" symbol.



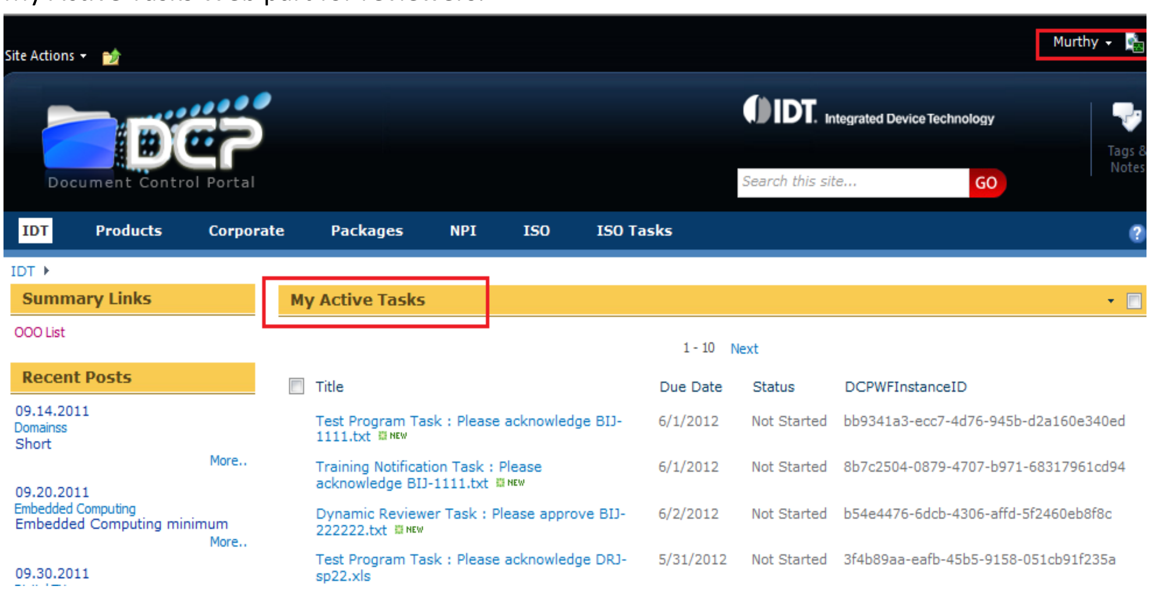
13.3 Search Results

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

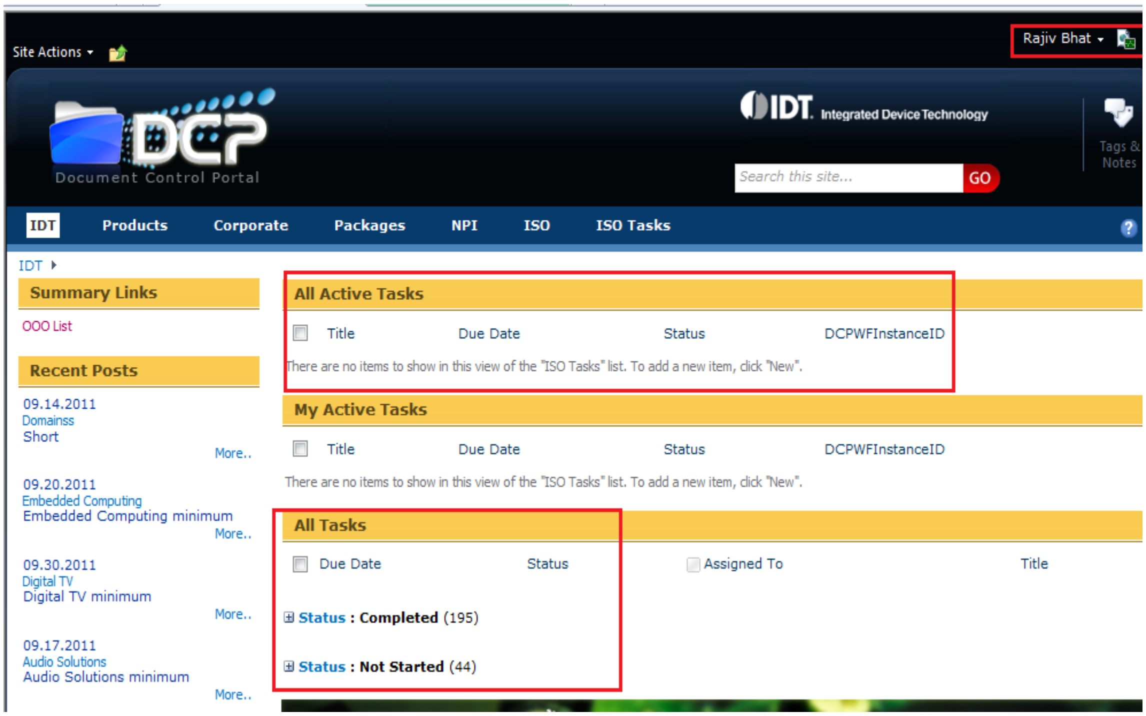


14 ISO Tasks web parts

- My Active Tasks Web part for reviewers:

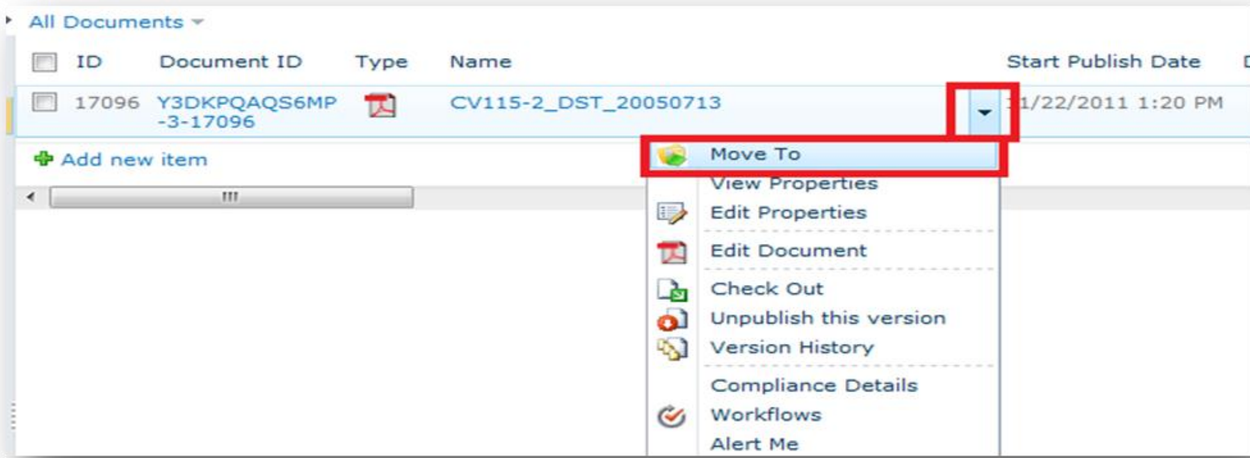


- All tasks Web Part: (this is for DC Contact)

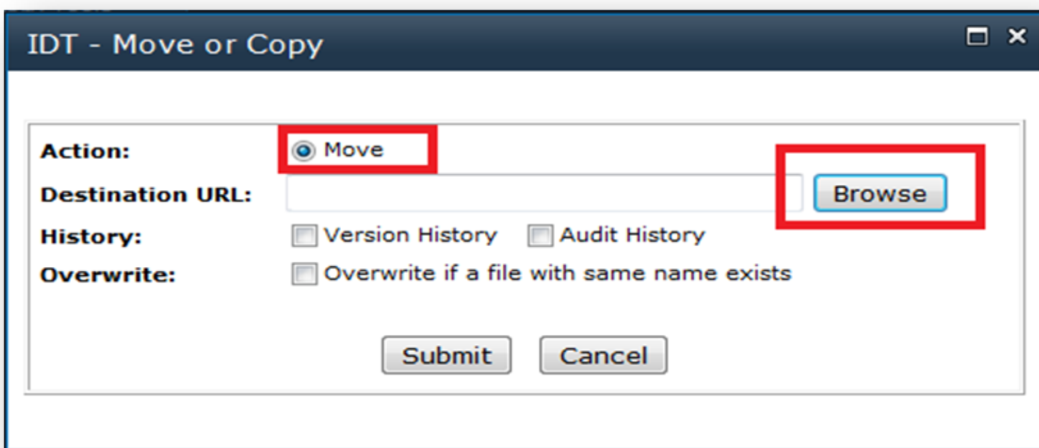


15 How to use "Move Document" functionality?

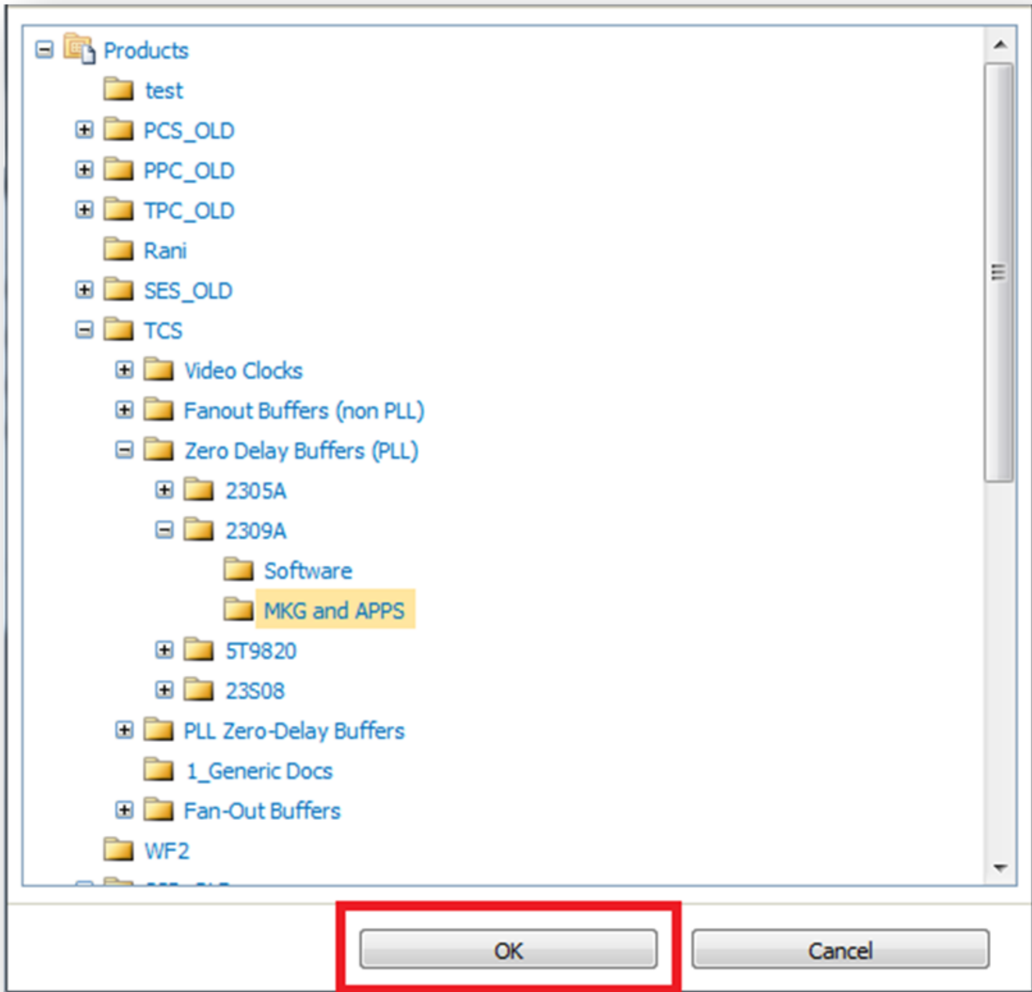
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to Publish the Document.
- Click on the arrow button, present on the right side of the Name field, 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.



- 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.

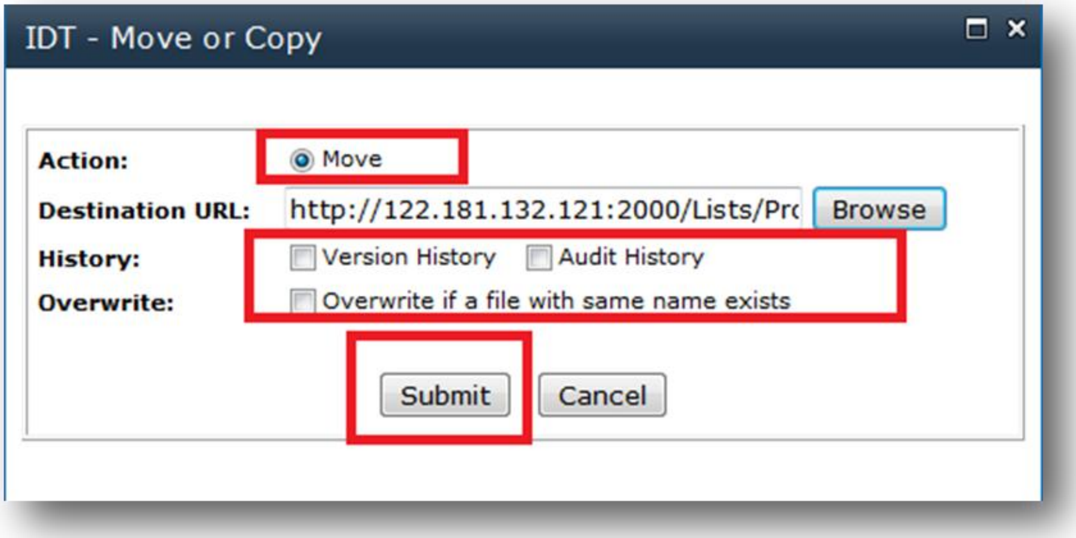


- On click of "***Browse***" button a new window would appear asking users for selecting the destination path for the document (shown below).
- Select the destination path for the document.
  NOTE: A document could be moved only within the document library (i.e., we cannot move a document belonging to 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.

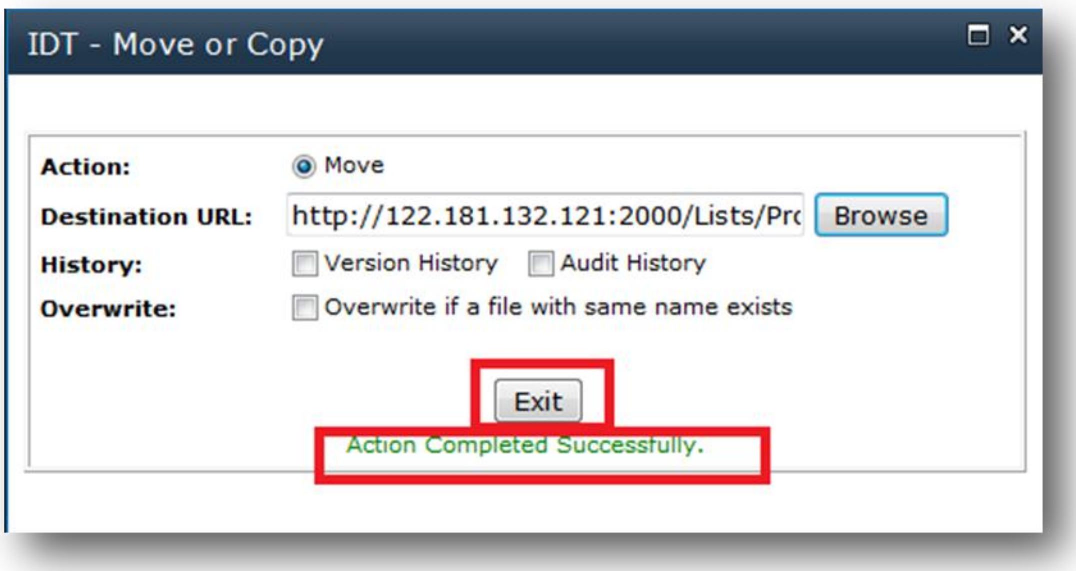


- Now the destination path would appear in the text box as shown below, in fig.
  NOTE: If user knows the destination path, then in that case they don't need to select the path from the folder browser. They, can directly type the path. The path entered should be of a folder, not of a file. If user enters 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.



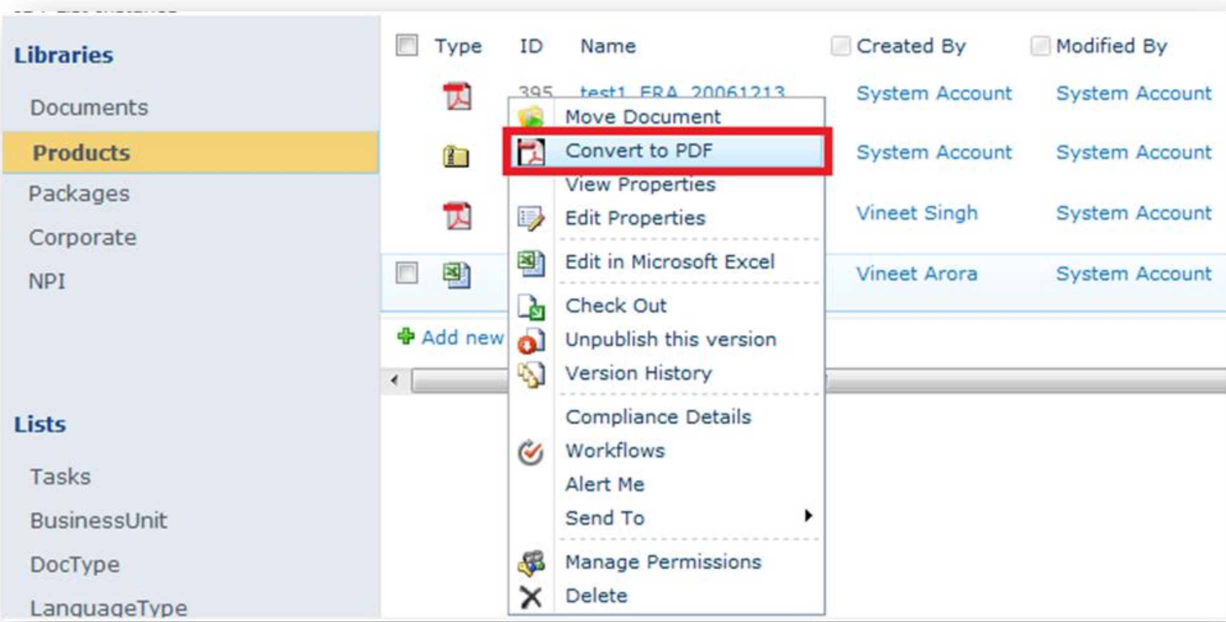
- Now based on the success/failure of operation, appropriate message will popup (shown in below fig).
- Click on "***Exit***" to exit the screen.



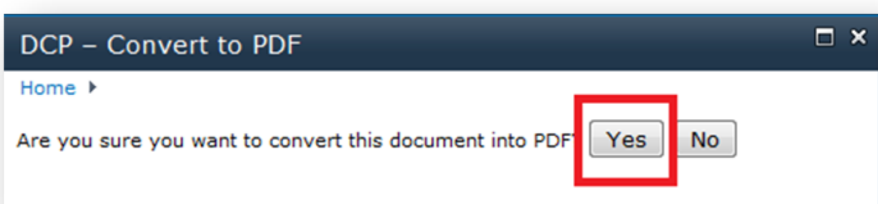
16 How to use Convert to PDF Feature?

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:

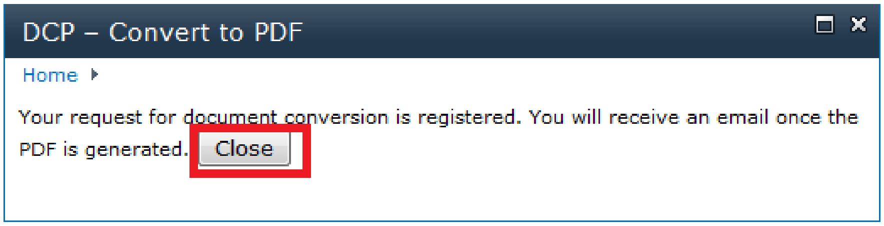
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to convert a document to pdf.
- Now select the checkbox against the document, which you want to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



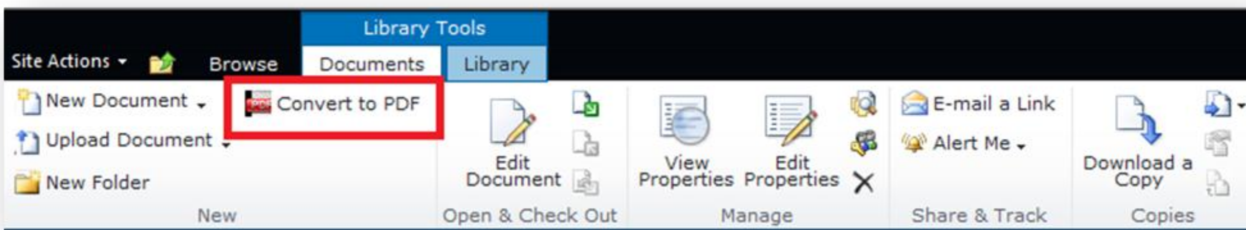
- A new window would appear as shown below.
- Click on "***Yes***" button to continue.



- 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.



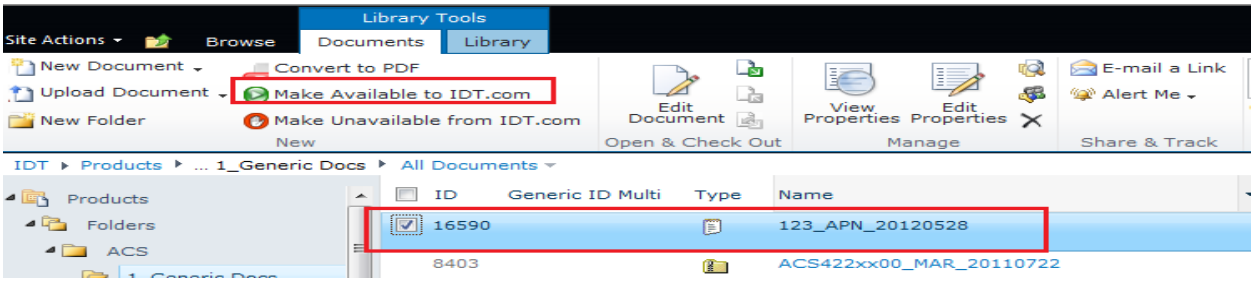
NOTE: "***Convert to PDF***" feature would be available only for those document libraries which will have an entry as "***Yes***" in "***MakeAvailableConfigList***" list.

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

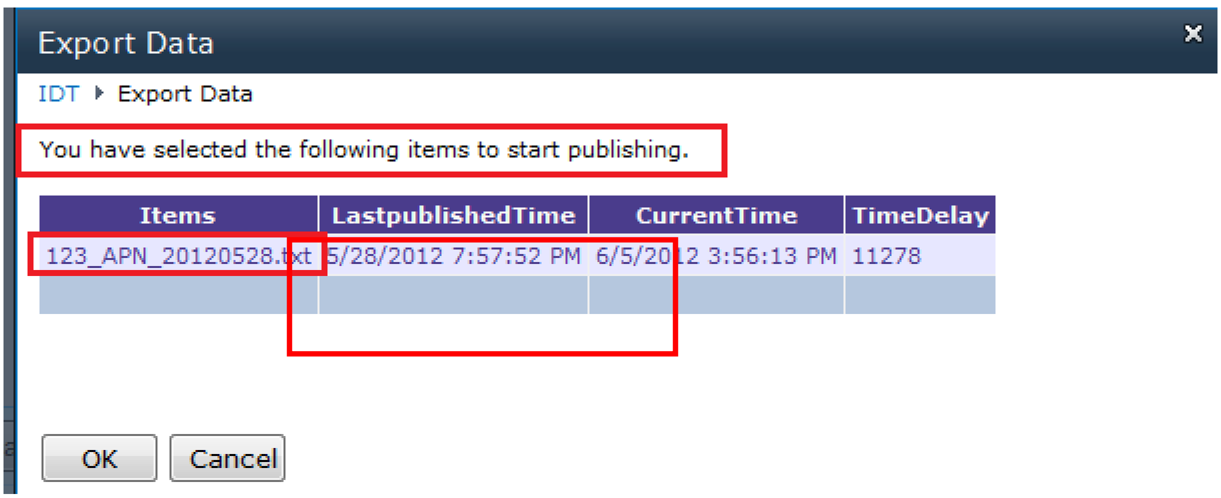
17.1 Make available to IDT.com feature

- This feature makes the select document(s) available for the www.idt.com import job to import it into **www.idt.com** site.
- Login to the DCP site, by typing the site URL (http://docs.idt.com) 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.

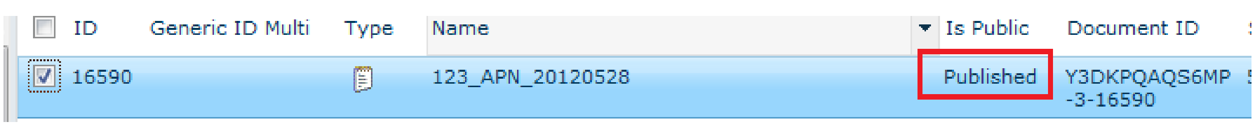
- Now click “***Make available to IDT.com***” button, with arrow sign (shown in below fig.) from ribbon control, for publishing the document.

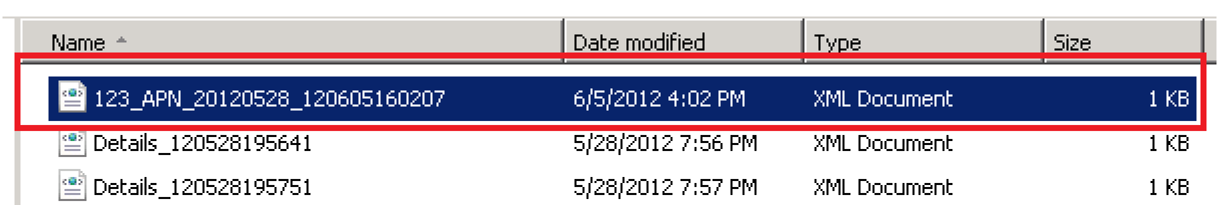


- On click of “***Make available to IDT.com***” Icon, a new window would appear, prompting user to publish the document, as shown in below fig.
- Click on “***OK***” button to publish the document.



- 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

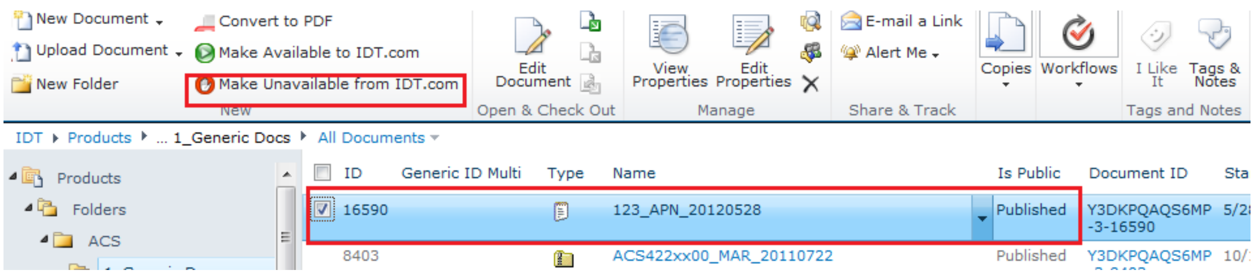




Note: Only those documents which are in “Approved” status could be published.

17.2 Make unavailable from IDT.com

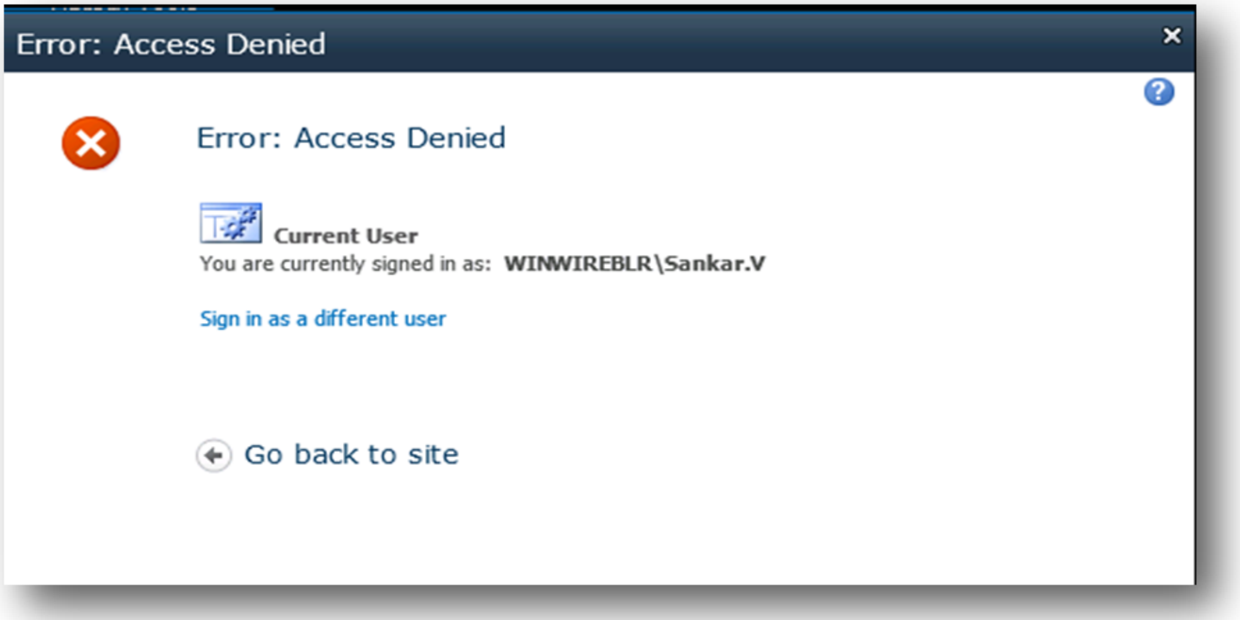
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to delete the Published Document.
- Now select the checkbox, present just before every item (shown 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.

- 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).



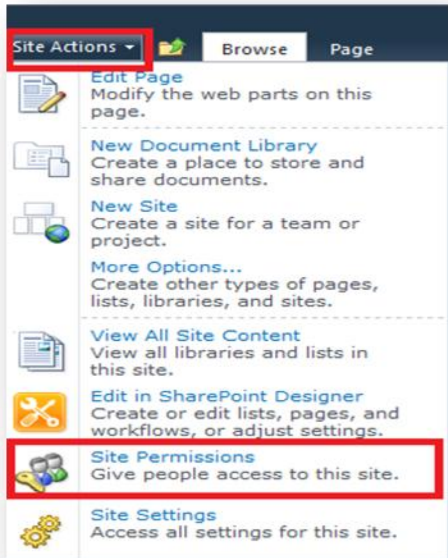
18 Administration /Super User Tips & Tricks

18.1 Security

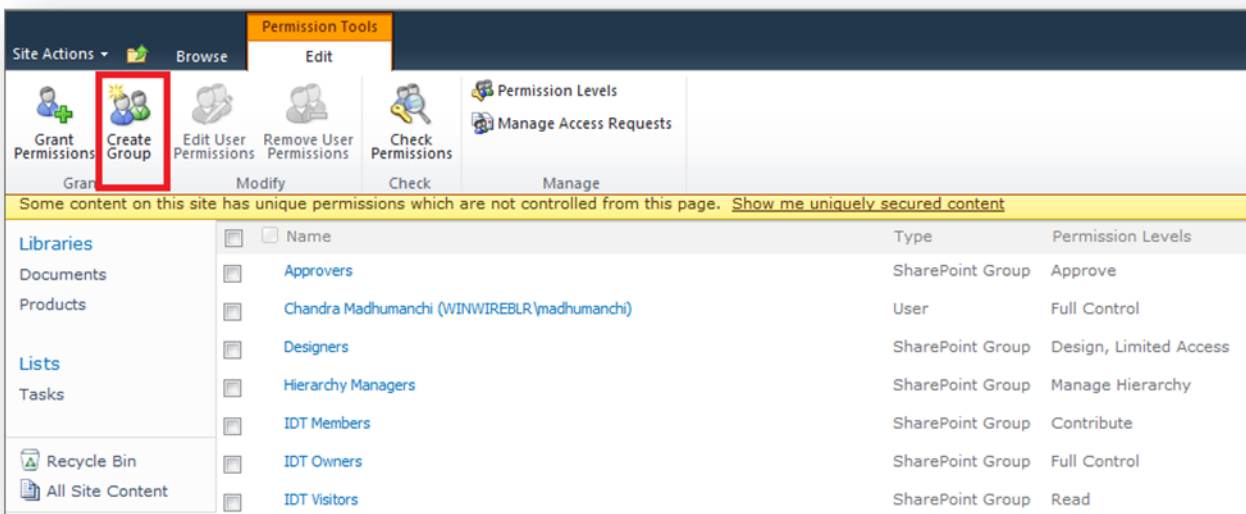
In SharePoint securities are maintained by creating the groups and then assigning appropriate permissions to those groups. A SharePoint group is nothing but a set of individual users. A SharePoint group can also include the Active Directory Group.

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

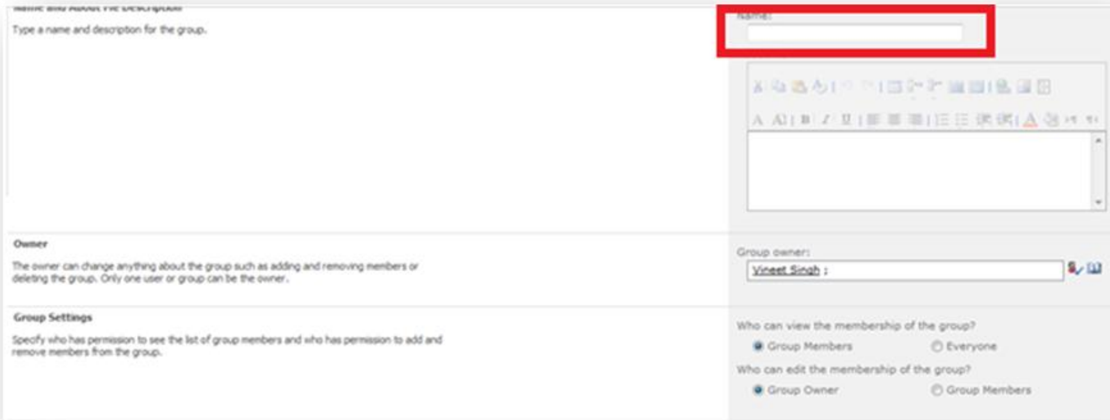
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the "***Site Actions***" tab present on top left corner of the site (as shown in fig below).
- After Clicking a new popup would appear.
- Now click on "***Site Permissions***" icon, as shown in figure

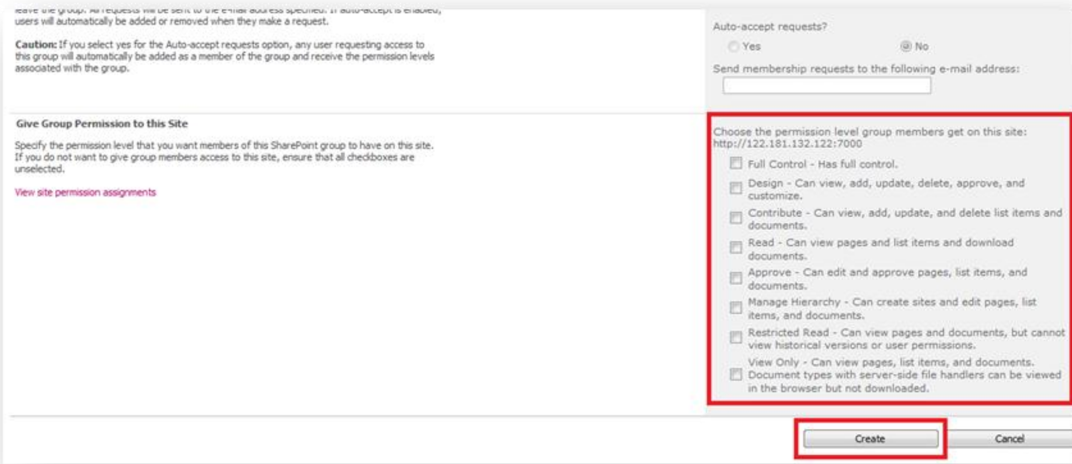


- After Clicking the "***Site Permissions***" link, a new window would appear, displaying all the User's/Groups' permissions (as shown in fig. below).
- On top left, Ribbon Control (shown in the fig.), there is a "***Create Group***" icon, Click on that to create the group.



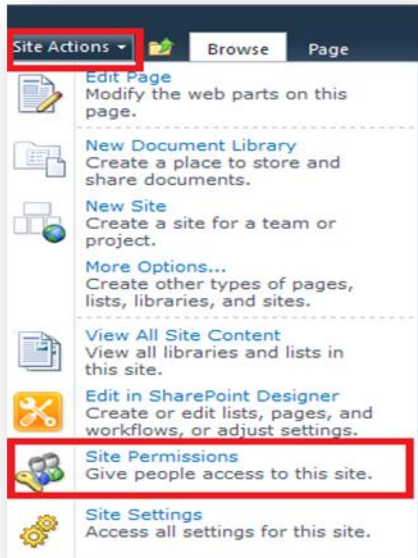
- After Clicking on "***Create Group***" icon, a new window would appear, as shown in the below fig., prompting users to enter the Group Name and other details.
- Enter the details, grant permissions (shown in below fig.) and click on "***Create***" button to create the group.



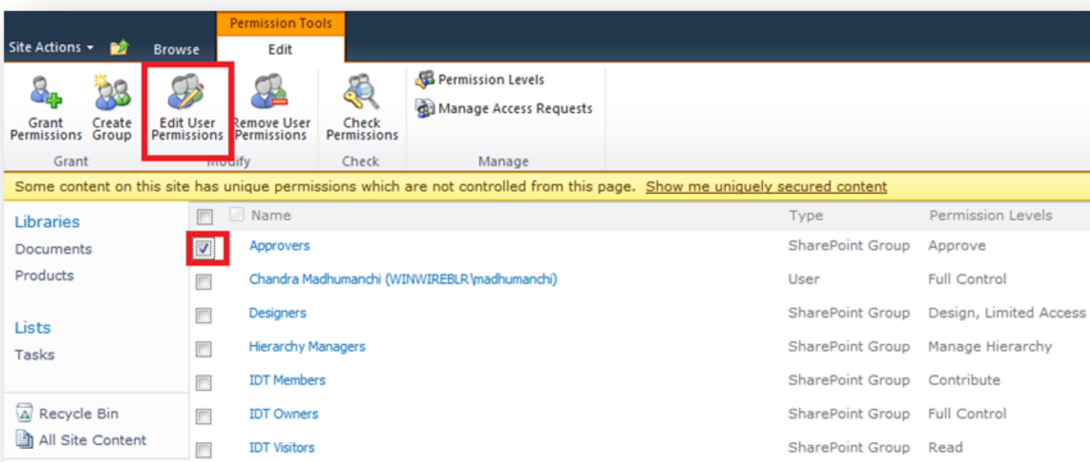


18.1.2 How to Change the permissions a Group/User:

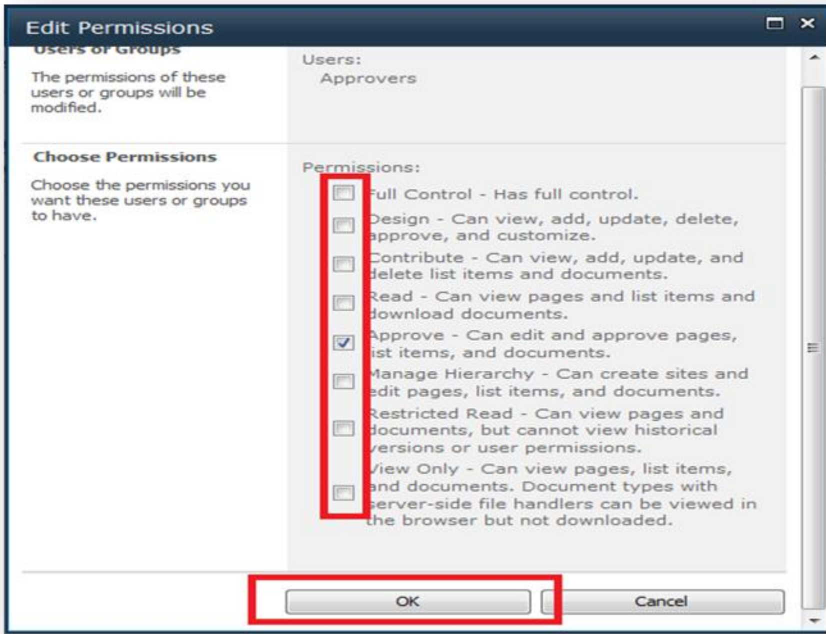
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the "***Site Actions***" tab present on top left corner of the site (as shown in fig below).
- After Clicking a new popup would appear.
- Now click on "***Site Permissions***" icon, as shown in figure



- 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.).

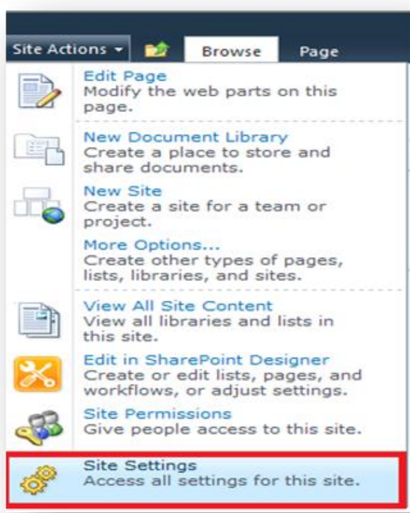


- On click of "***Edit User Permissions***" icon, a new window would appear (shown in below fig.).Select the appropriate check box (shown in below fig.) and click "***OK***" button to grant the selected permissions.

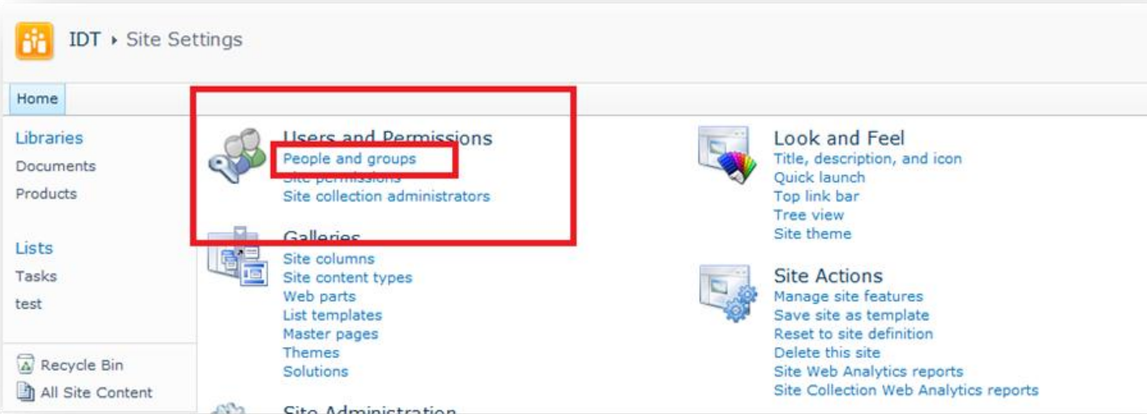


18.1.3 How to add users to the Groups?

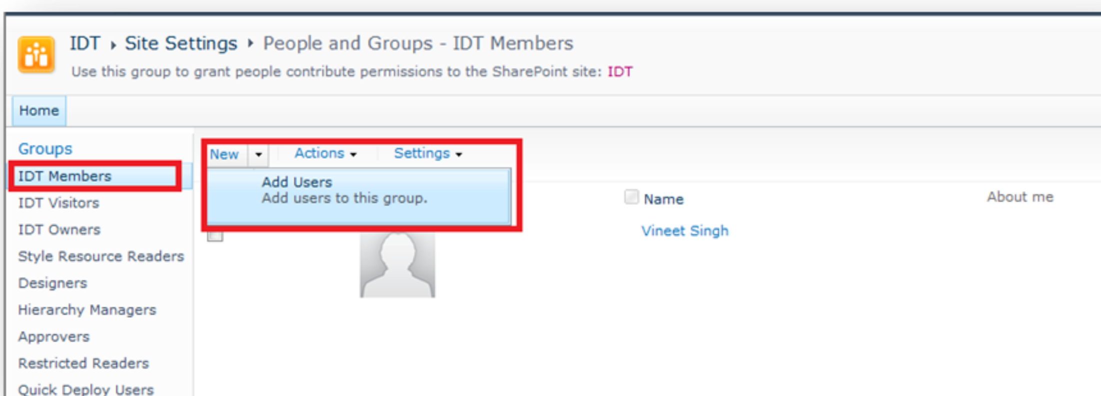
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the "***Site Actions***" tab present on top left corner of the site (as shown in fig below).
- After Clicking a new popup would appear.
- Now click on "***Site Settings***" icon, as shown in figure



- 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.



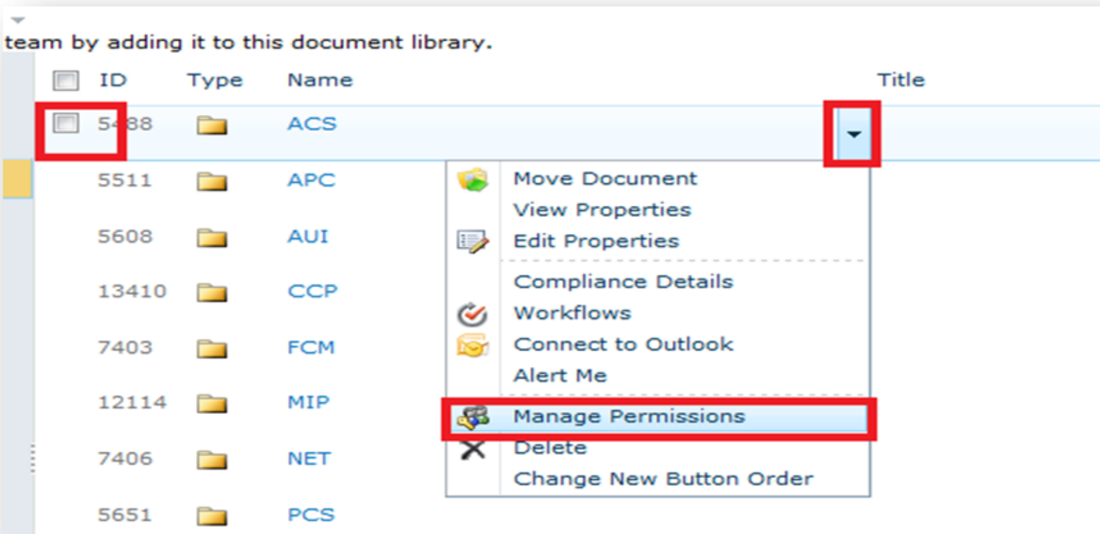
- A new window would appear as shown in the below fig.
- On left hand side, Quick Launch Bar, we have all the groups, select the group where we want to add users.
- Now, on right had side (as shown in fig.) click on "***New***" and then "***Add Users***" as shown.



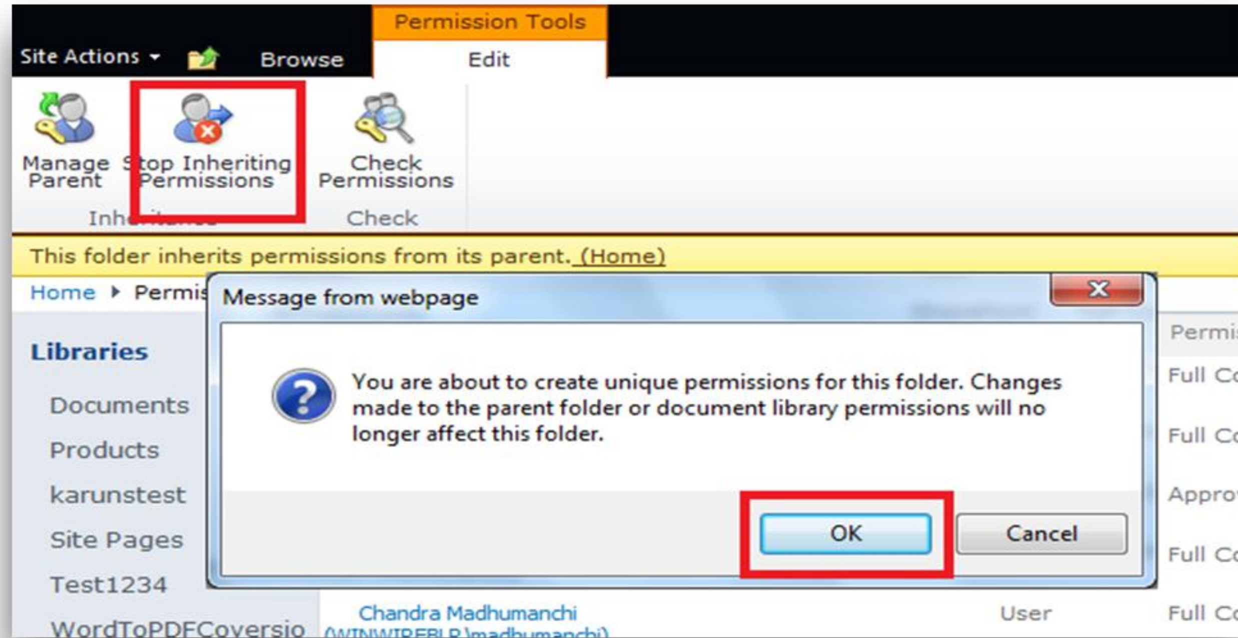
- On Click of "***Add Users***" a new window would appear, as shown in the below fig., prompting user to enter the new user which has to be added to the group.
- Add the user's name, validate it by clicking on icon (shown in fig) and then click "***OK***" button to add the user.
- User is now part of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

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

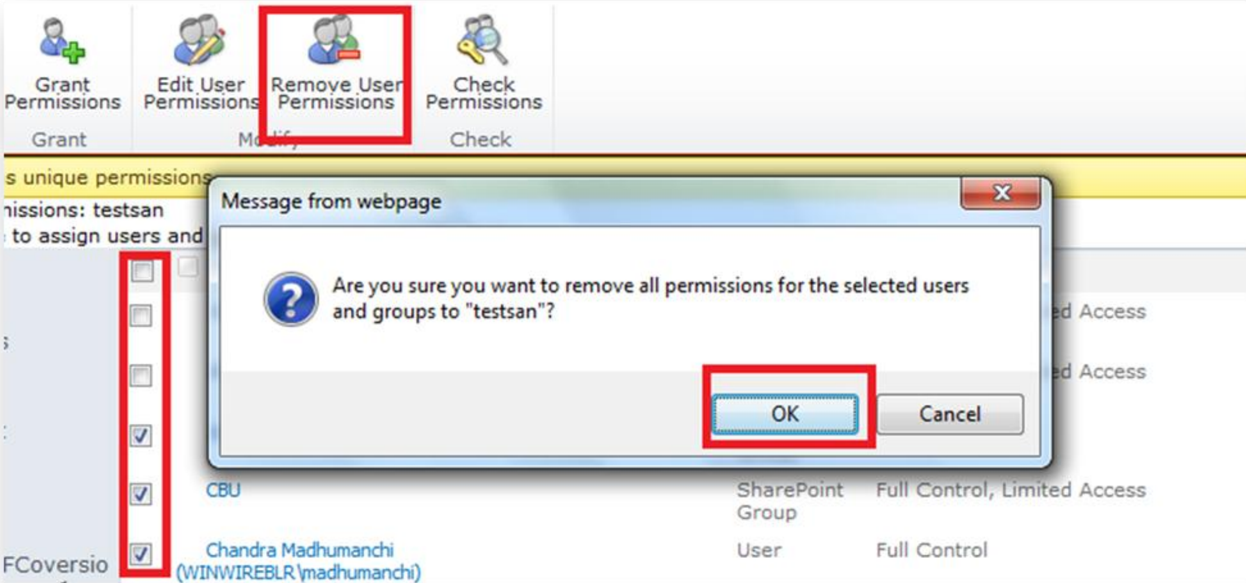
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), from where we need to send the Document Link.
- Click on the arrow button, present on the right side of the Name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



- 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.



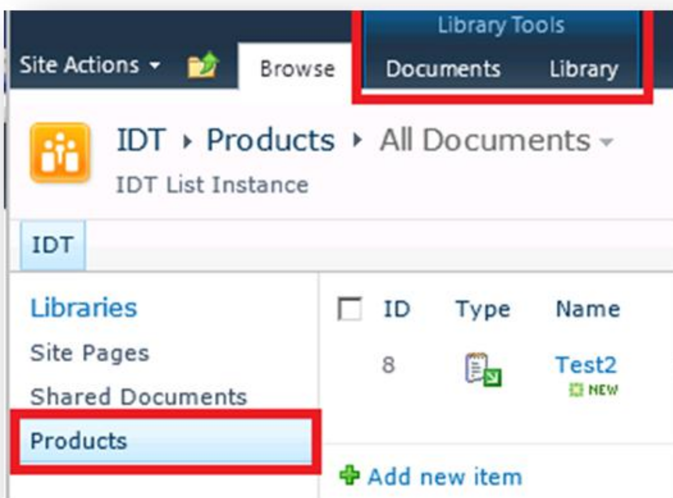
- On click of "***OK***" button, same window would appear with check box before each security group.
- Check the check boxes, present before the security group, for those security groups which we don't want to have permission for the folder.
- Now click on "***Remove User Permission***" link, present 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.



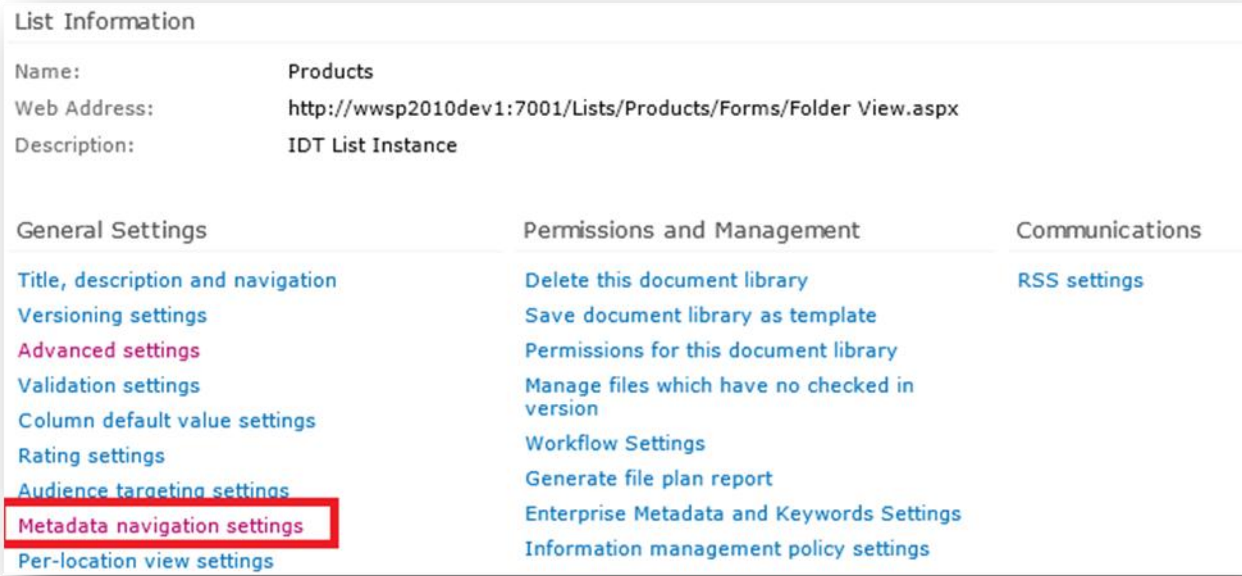
18.2 Site Administration

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

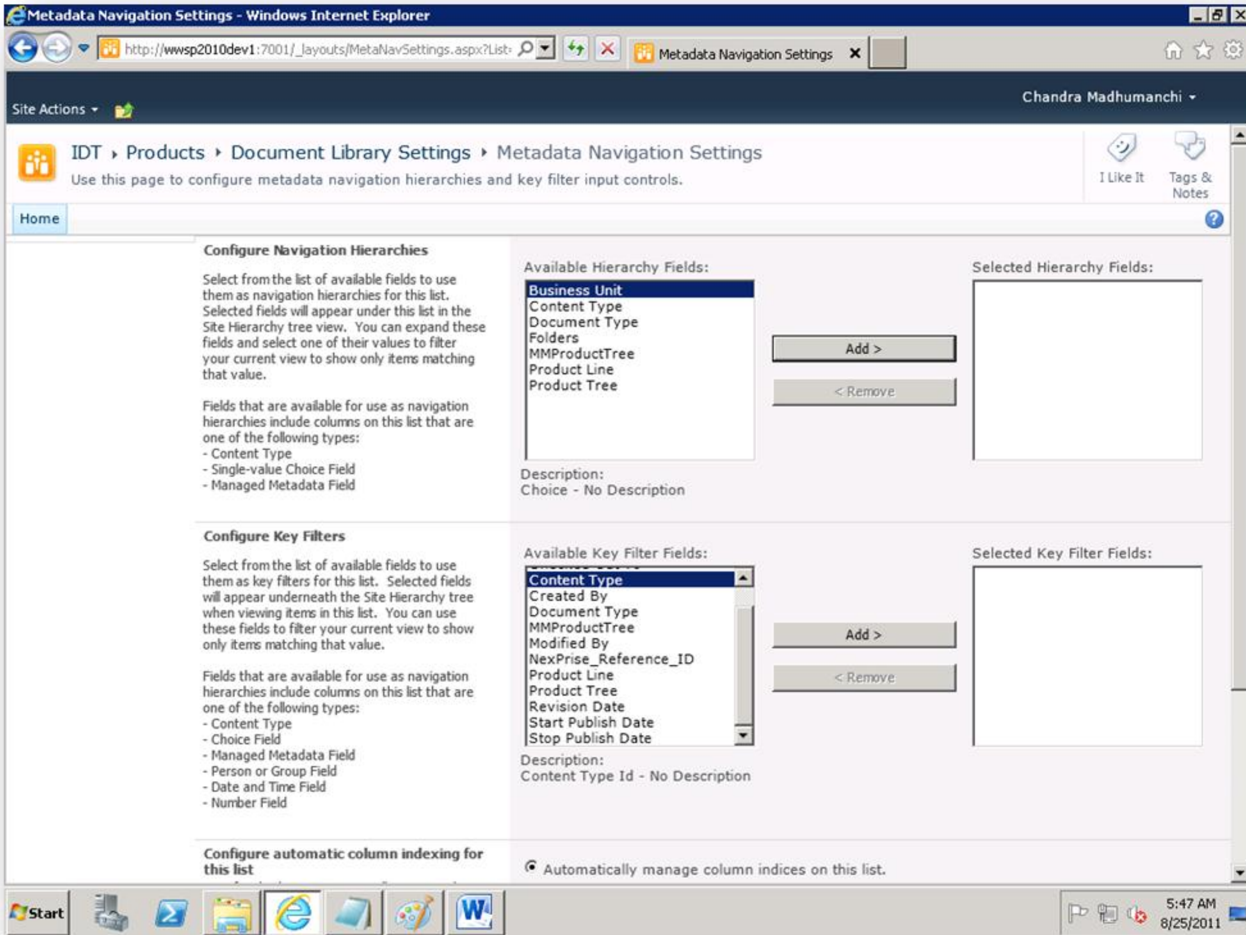
- Navigate to **IDT Home** page and click on "***Products***" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "***Library***" under the "***Library Tools***" section of Ribbon control.



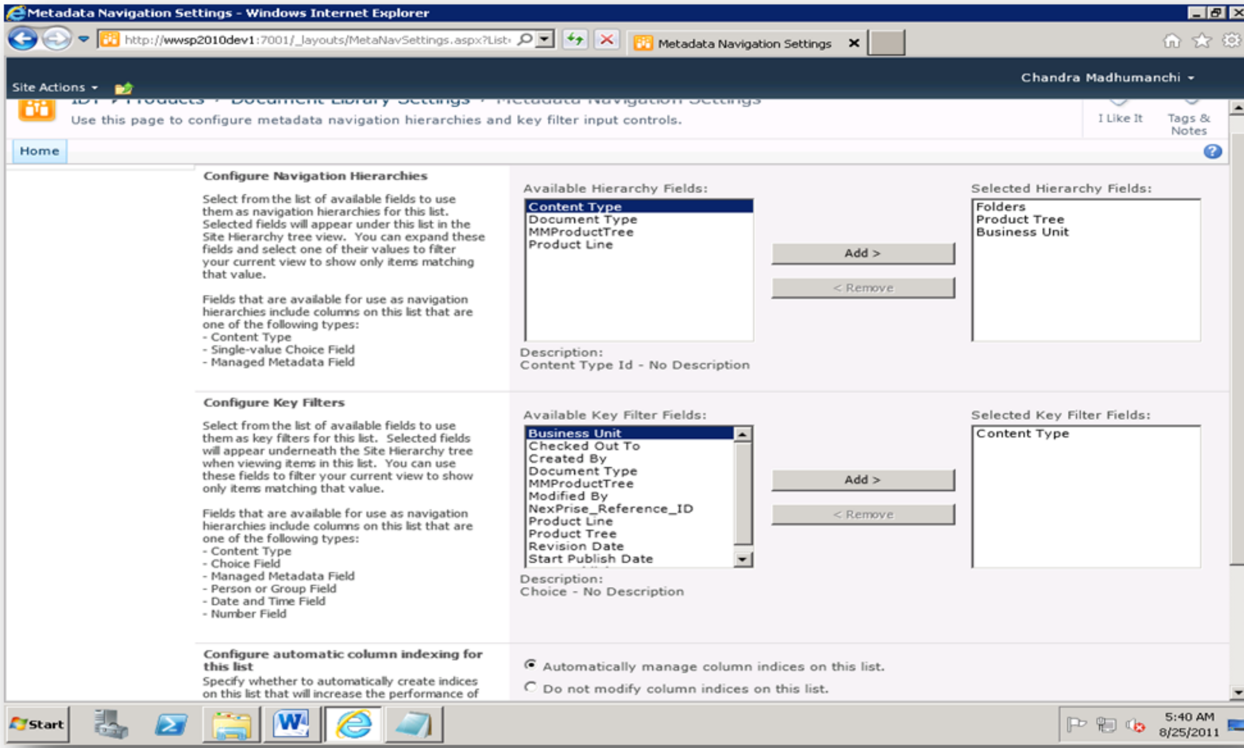
- Now in settings Section, click on list settings. It will appear the following screen.



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



- 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.



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)

Business Unit	Document Type	DocumentApprover
VDO	Application Note/Technical Paper	Chandrashekar Reddy
COM	Datasheet	Rajiv Bhat
NETCom	Software Tool	Zuber Ahmed

Add new item

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

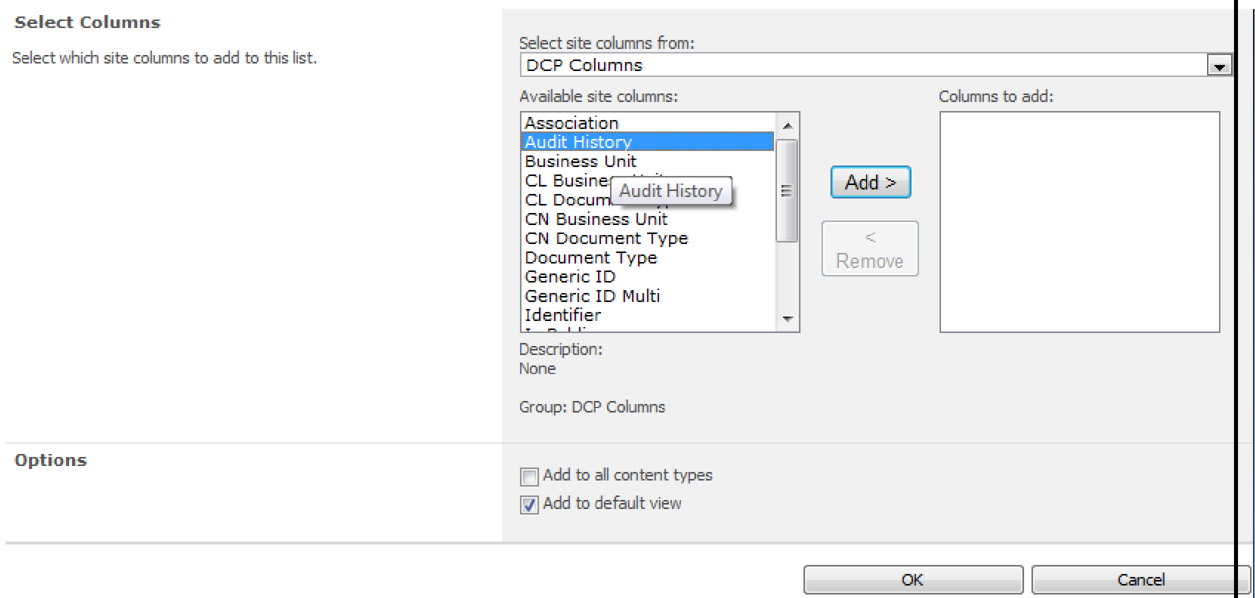
The above content types are part of ***"ISO Content Types"*** group. This is attached to ***"ISO"*** Document Library and used for storing the attached document metadata which are uploaded to ***"ISO"*** Document Library.

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 → 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.



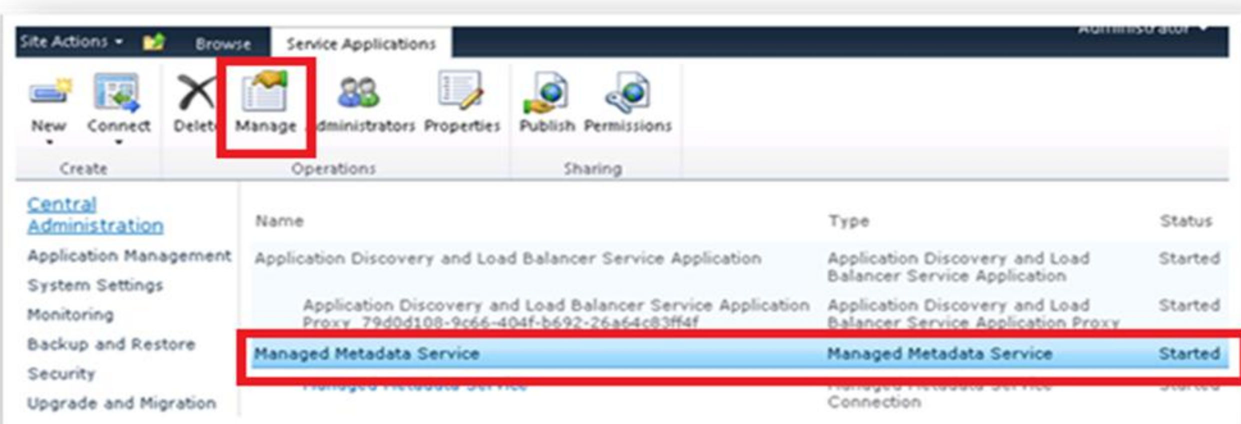
g. Click Add and then 'Ok'

18.3 Setting up Metadata Navigation:

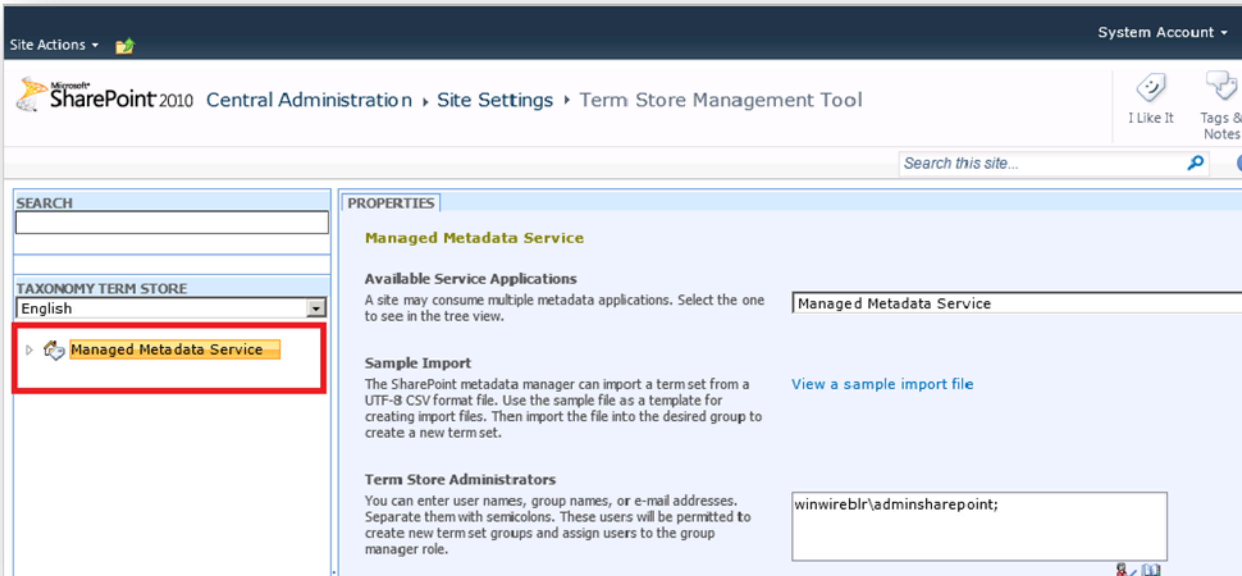
Metadata Navigation provides the virtual mapping of a document to a path. A document can be tracked with the help of these navigations.

18.3.1 How to create managed metadata term in Central Admin?

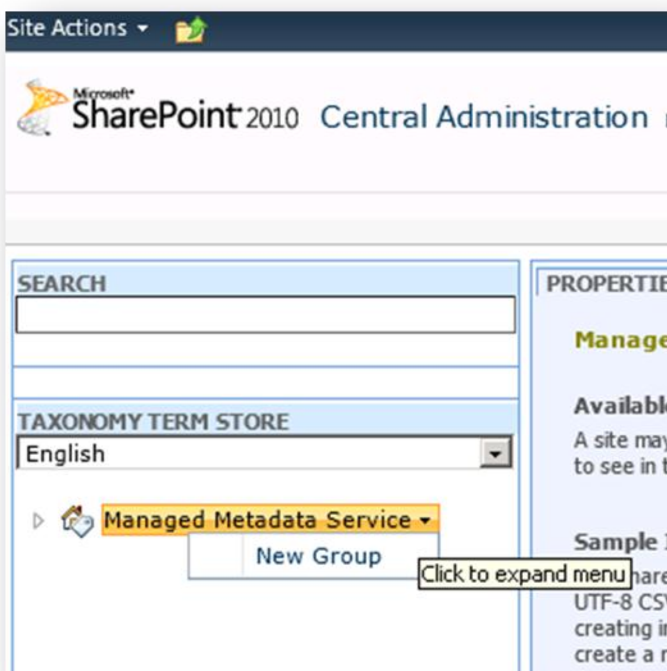
- Navigate to SharePoint 2010 Central Administration/ Manage Service Applications and clicking on Metadata Service.
- You can achieve the same by highlighting the service application and clicking on the Manage icon located in the ribbon



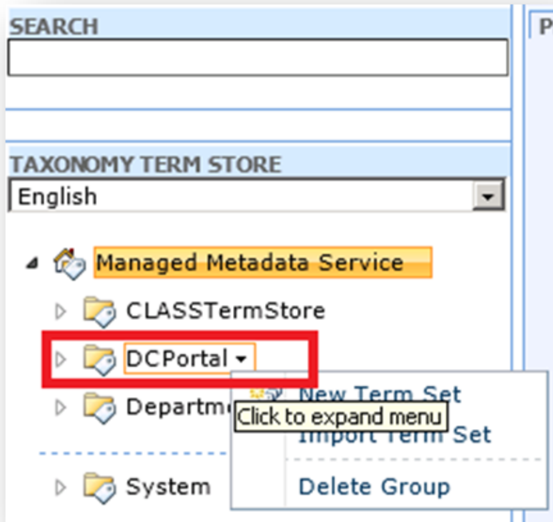
- A new window would appear, this window is also referred to as the Term Store Management Tool.



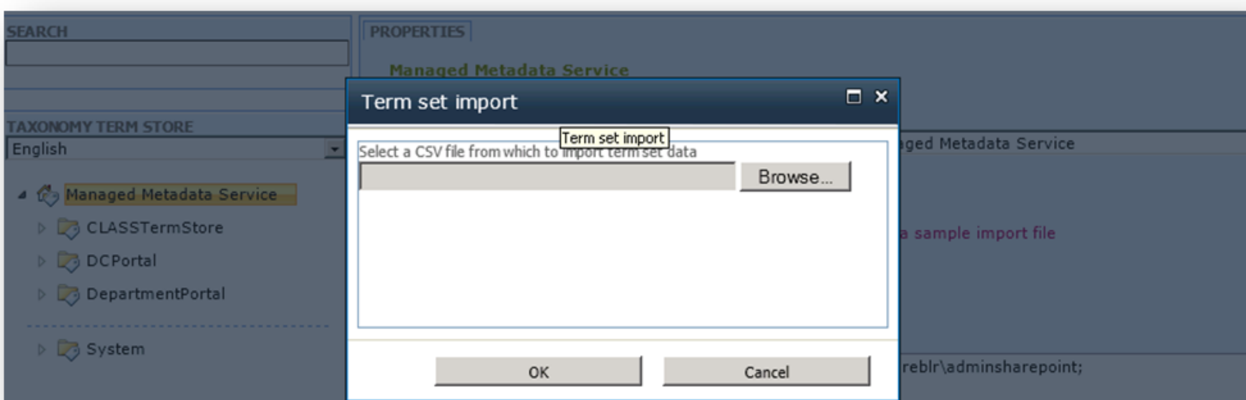
- Click on Managed Metadata Service link highlighted red colour in above screen to create new term group. The following screen would appear



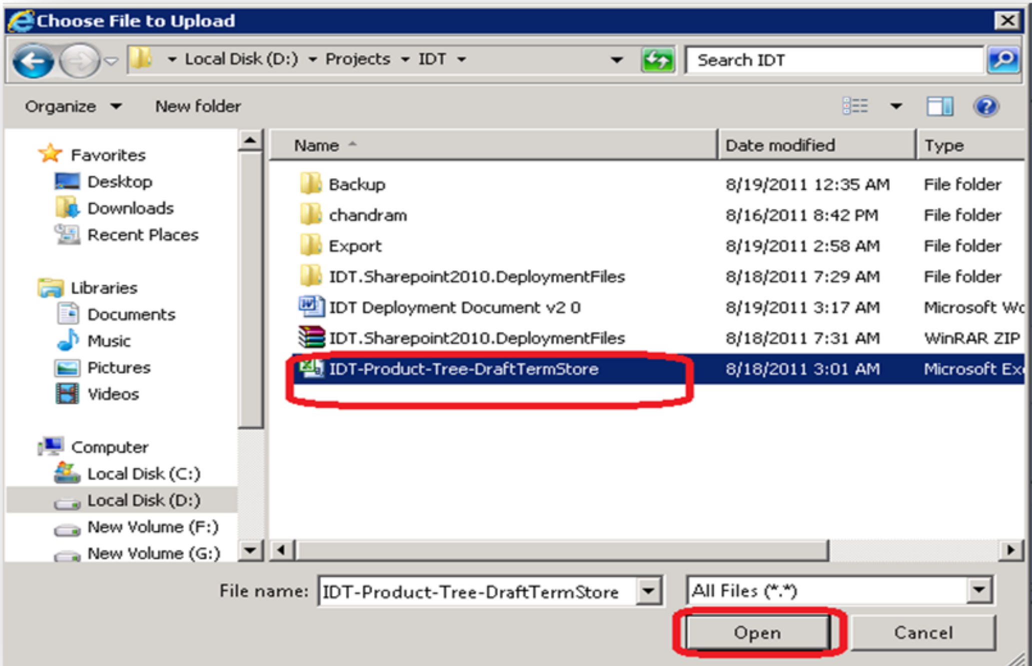
- Click on New Group
- Enter Group Name As "**DCPortal**"
- Click on "***DCPortal***" link shown in below screen



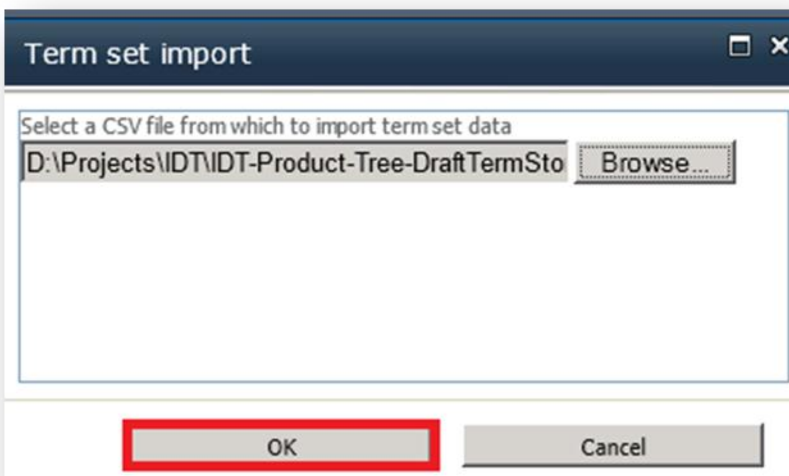
- Click on Import term set link



- 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.

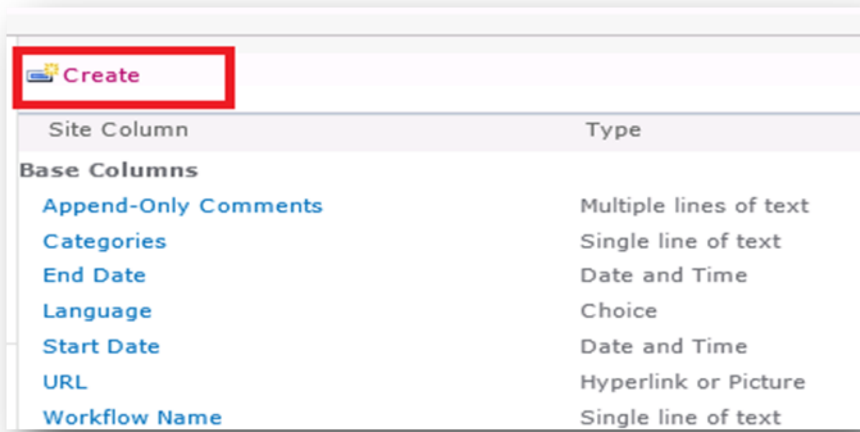


- Click on OK to create "**product tree term set"**

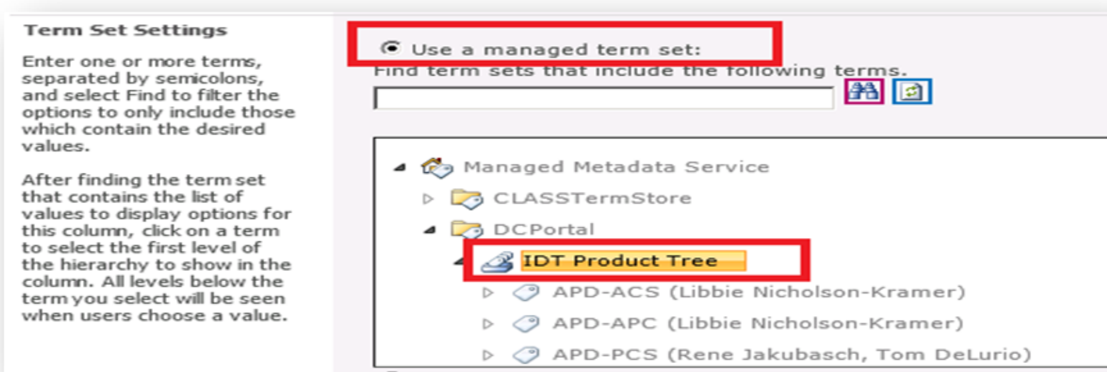
18.3.2 How to create the site column for managed metadata term?

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

- Click on "***Create***" shown below



- 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.



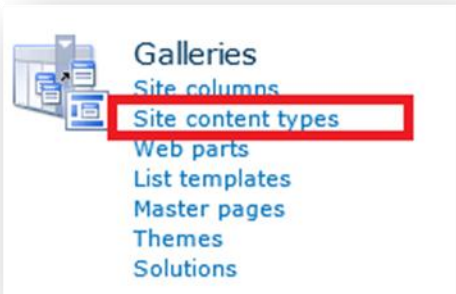
- Select the "***IDT Product Tree***" Term set
- Click "***OK***" to create the column.

18.4 How to create the Folder Content Types?

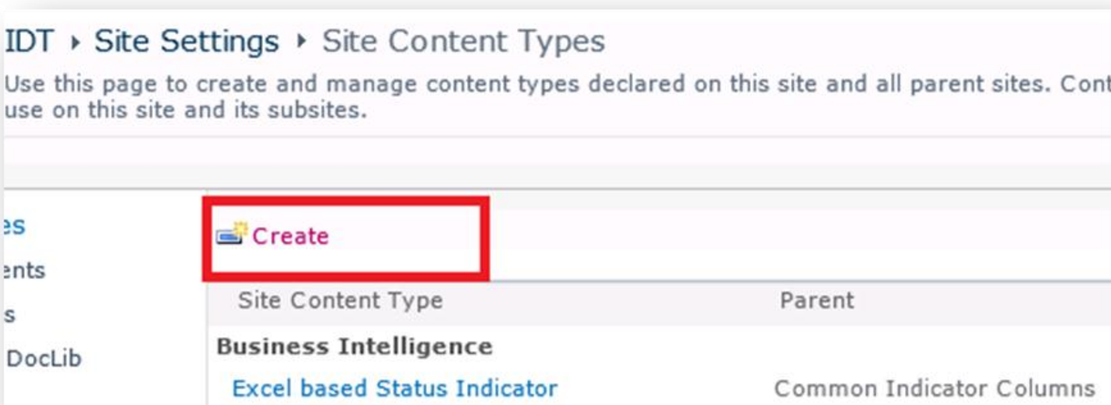
Here we need to create 2 content types namely "***Doc Control Folder***" and "***Part Number Folder***". The content type creation for these two types of folders is mentioned below.

18.4.1 Doc Control Folder

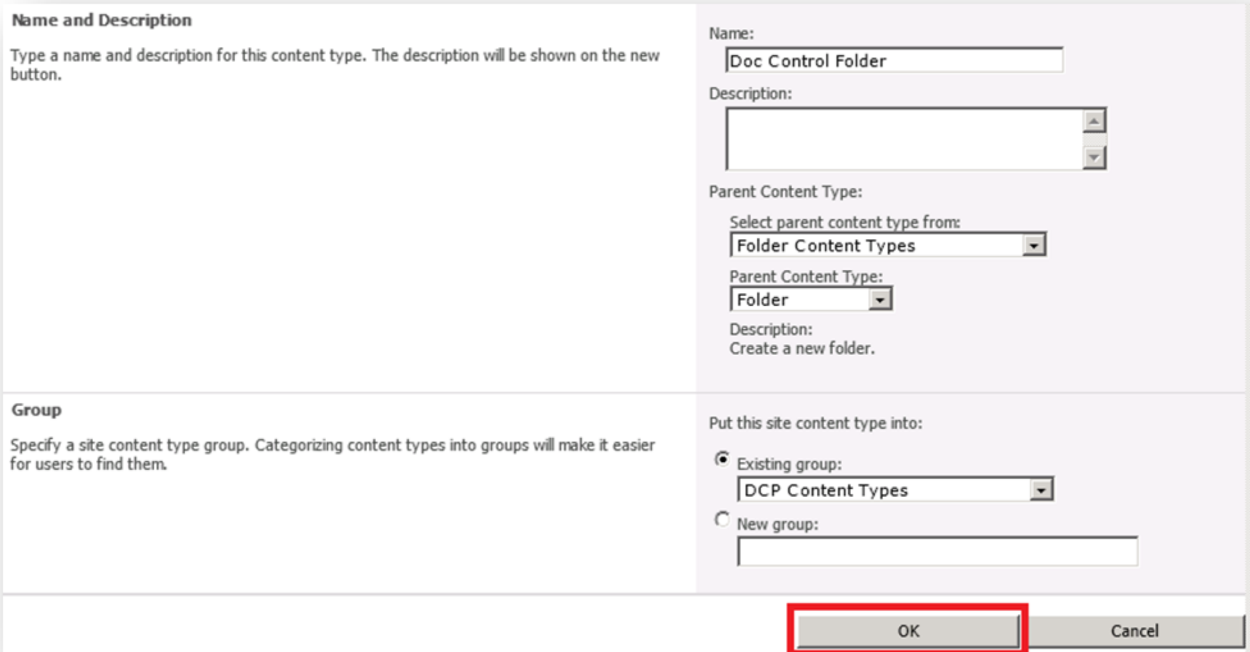
- Navigate to the Site Settings page
- Under 'Galleries' section, click "Site content types"



- Click on Create shown below



- 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.

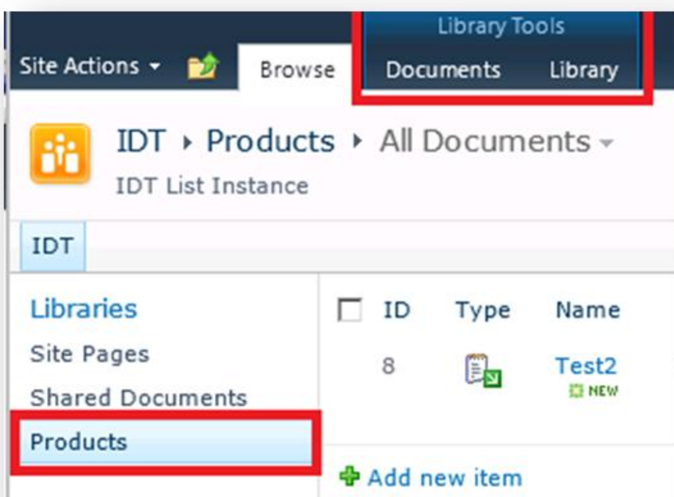


18.4.2 Part Number Folder

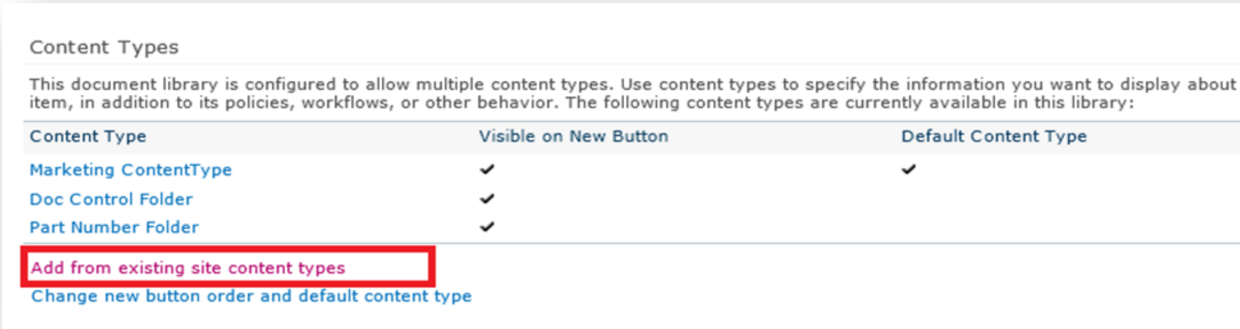
The step for creation of "***Part Number Folder***" is same as that of "***Doc Control Folder***". Just change the name while creating the content type.

18.5 Adding content type to Document Libraries?

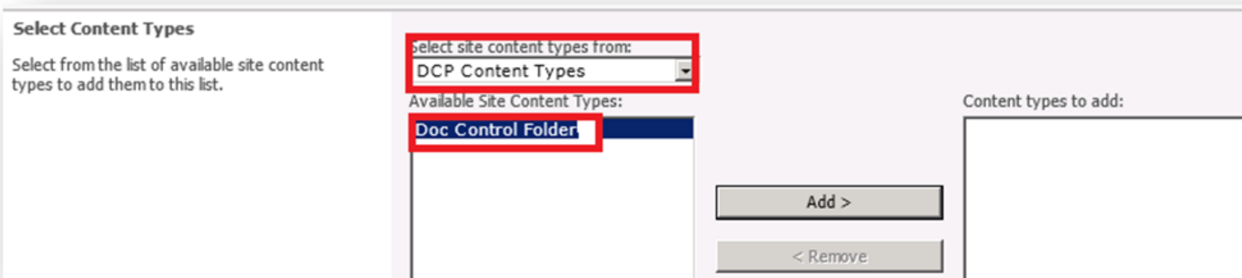
- Navigate to **IDT Home** page and click on "**Products**"document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "**Library**" under the "**Library Tools**" section of Ribbon control.



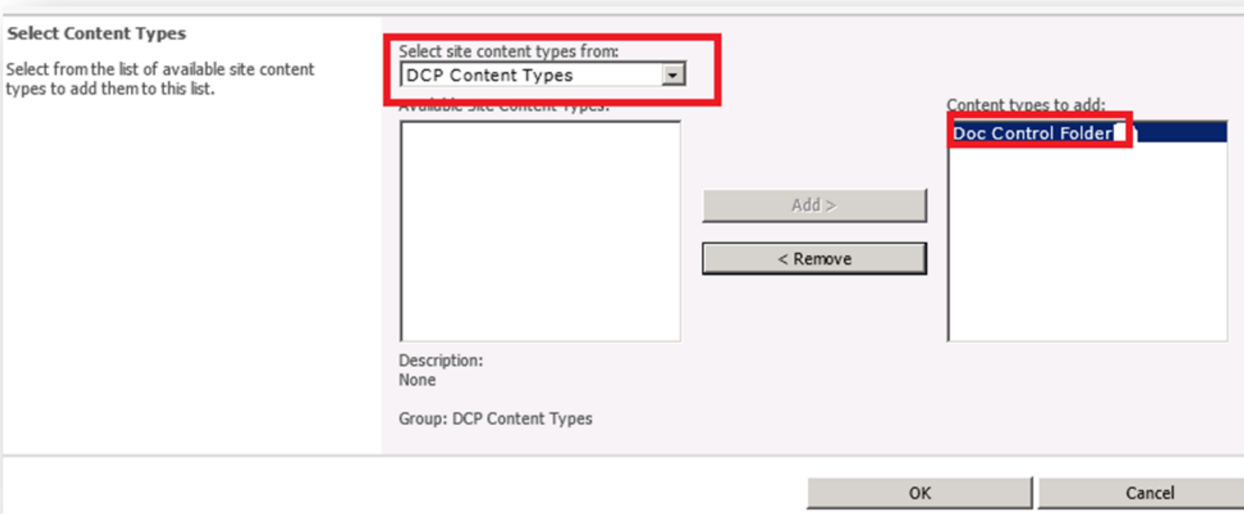
- Now in Settings Section, click on List Settings
- Under Content Types section. Click on Add from existing content types shown as below screen.



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



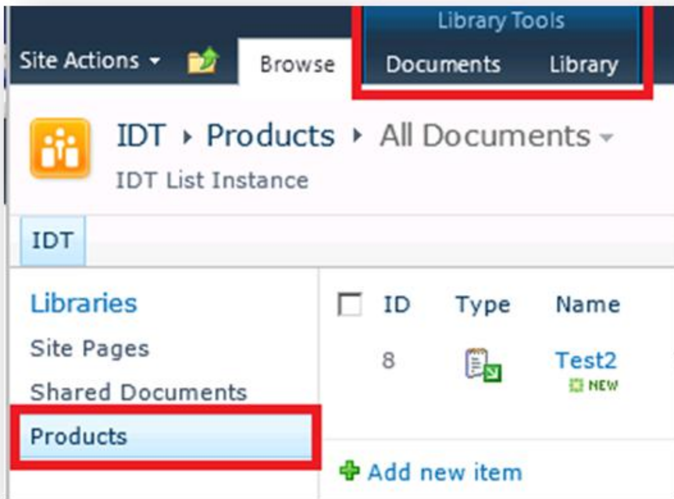
- Select "***Doc Control Folder***" content type from Available site Content types and Click on Add Button.



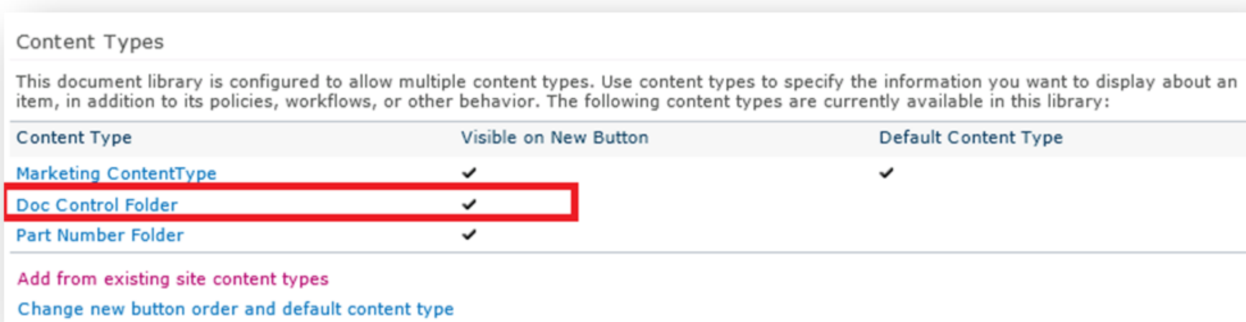
- Click on "***OK***" button. "***Doc Control Folder***" content type will add to product document library.

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

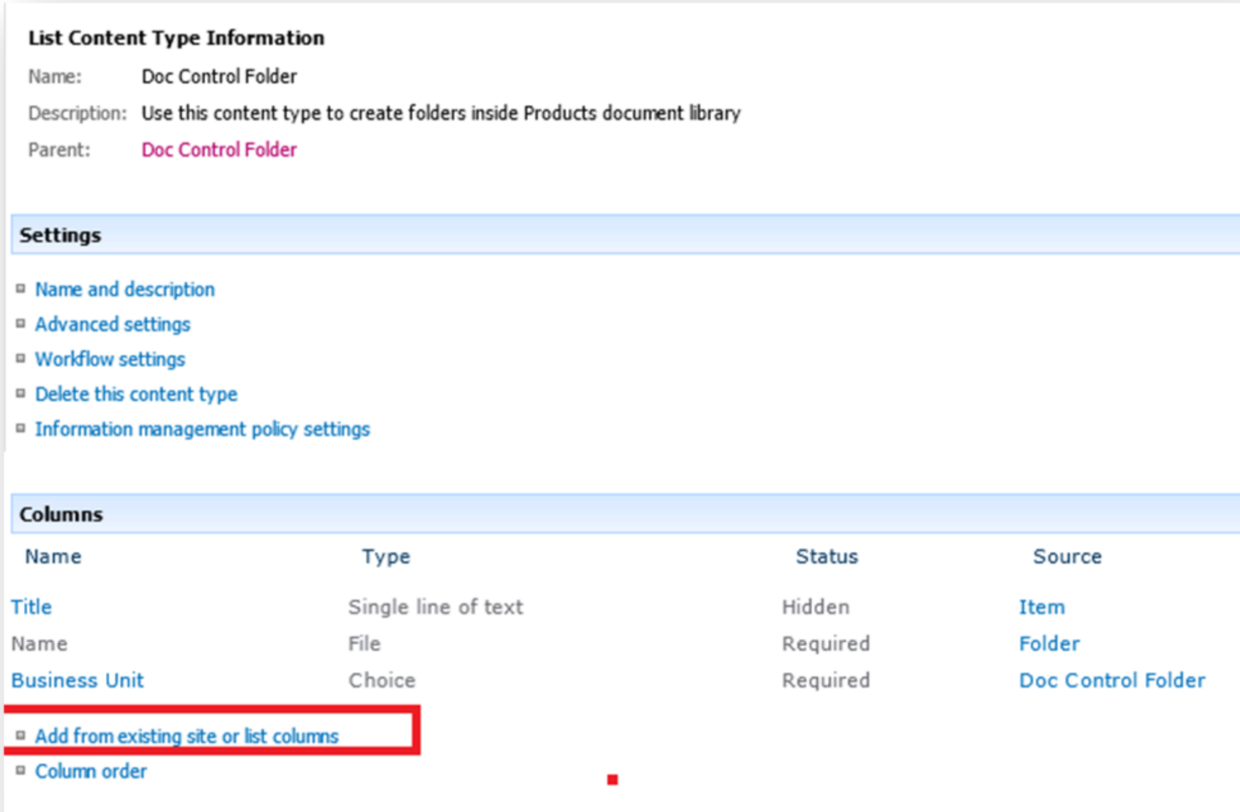
- Navigate to **IDT Home** page and click on "***Products***" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "**Library**" under the "**Library Tools**" section of Ribbon control.



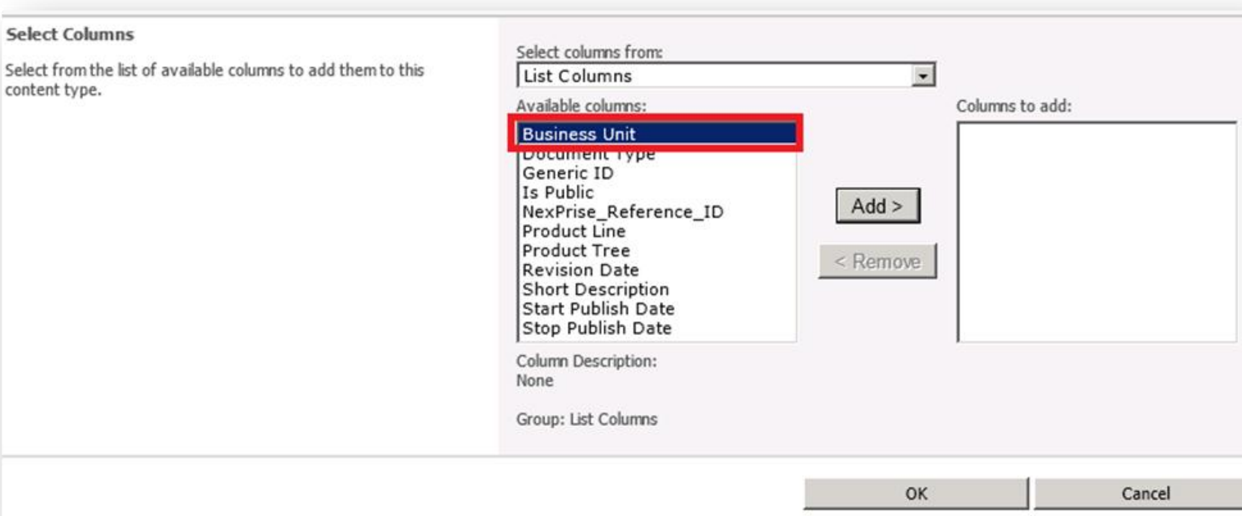
- Now in Settings Section, click on List Settings
- Under Content Types section. Click on "***Doc Control Folder***"content type as shown below.



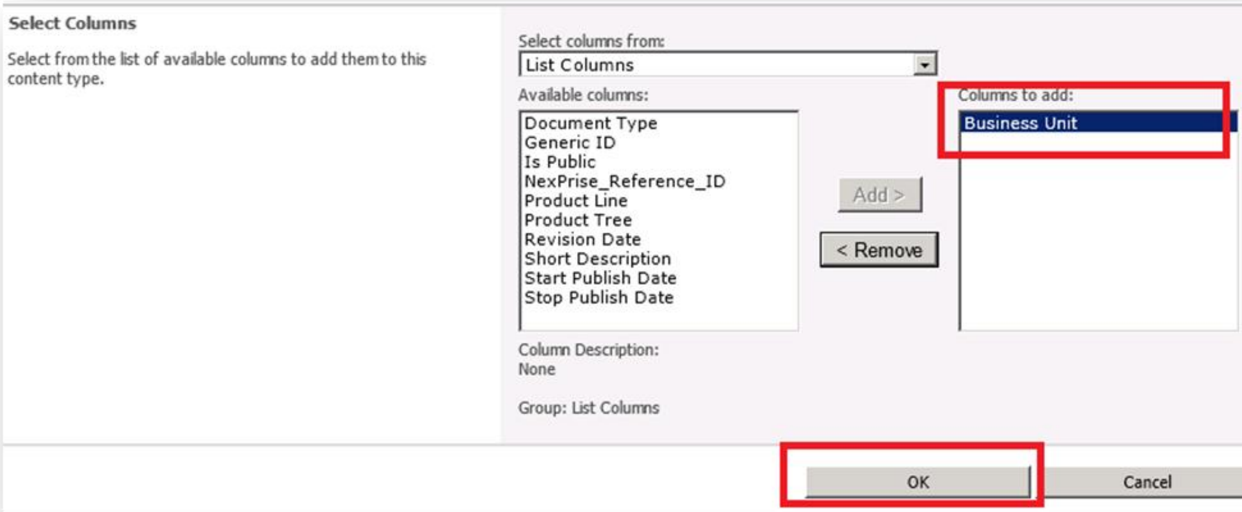
- The following screen would appear



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



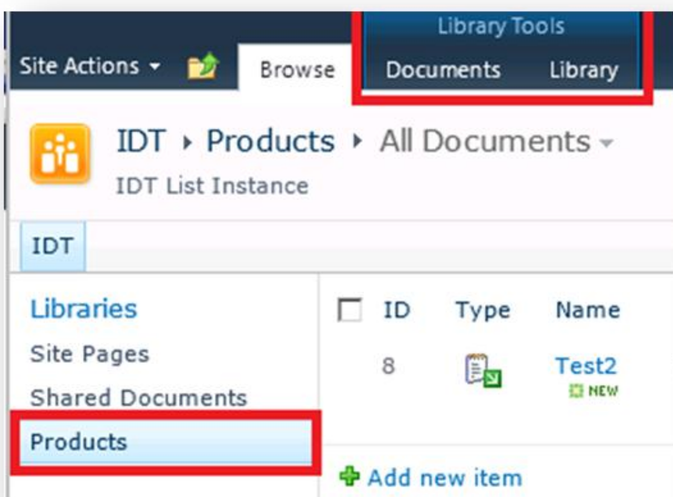
- Under Available columns select the "***Business Unit***" and click on Add button. The following screen would appear.



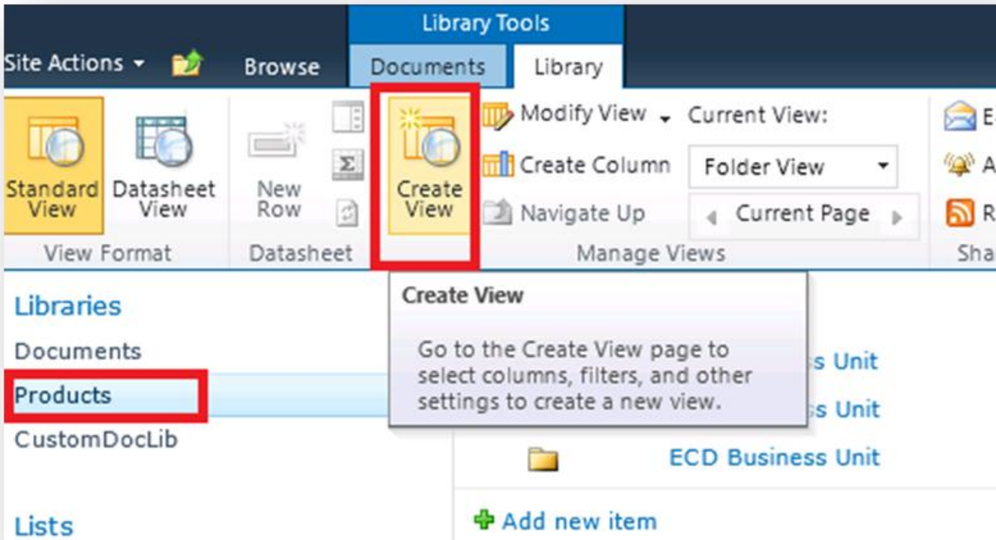
- Click on "OK" button. "***Business Unit***" column would be added to "***Doc Control Folder***".

18.7 How to Create the Folder view?

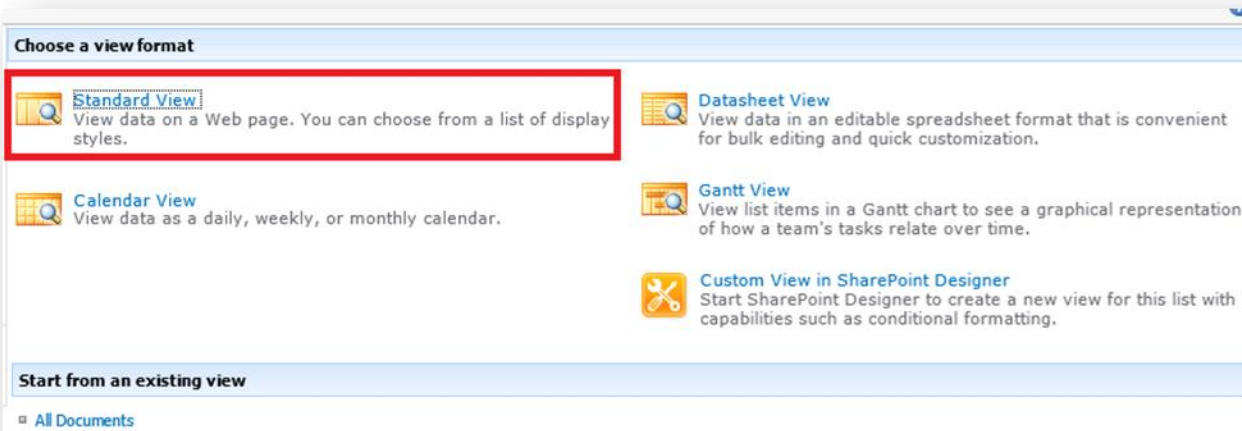
- Navigate to **IDT Home** page and click on "***Products***" document library Link present on the Left hand side of the site (**Quick Launch**).
- Click on "**Library**" under the "***Library Tools***" section of Ribbon control.



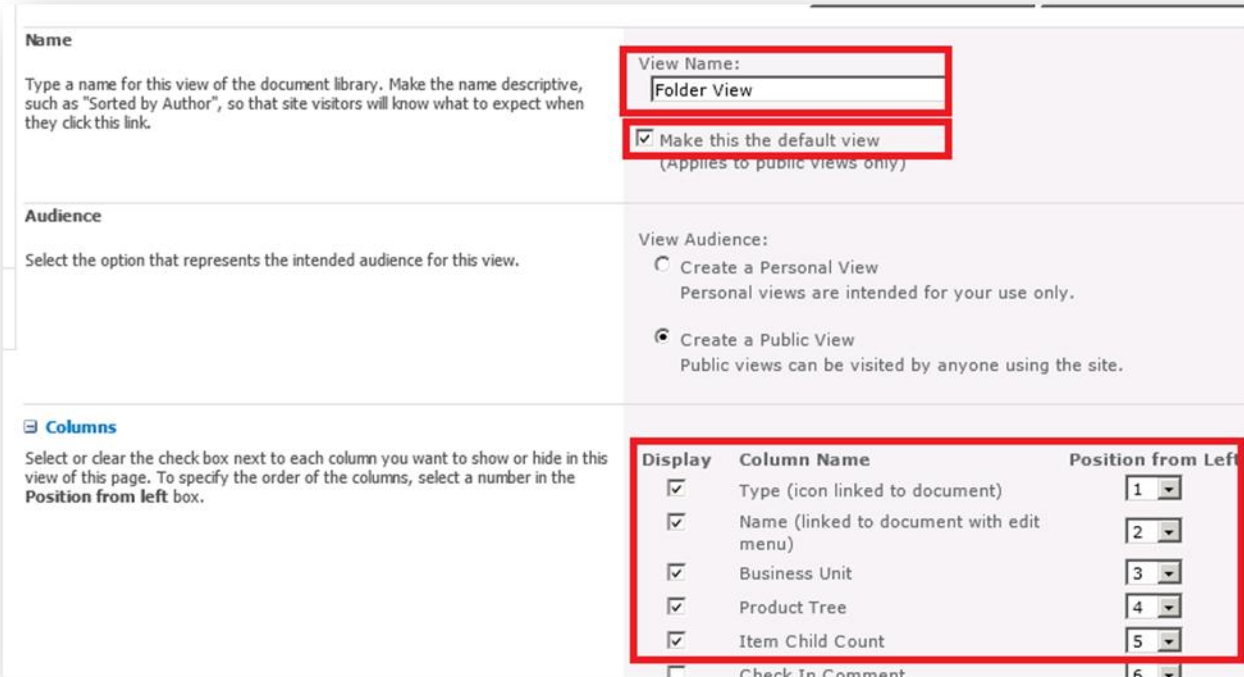
- Now in "***Manage Views***" section, click on "***Create View***" section.



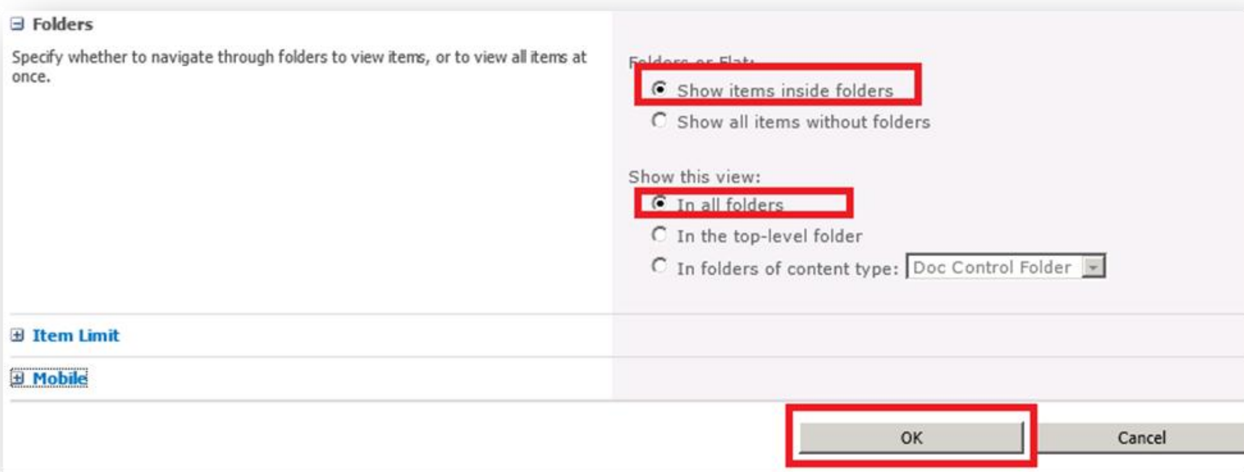
- After clicking the “***Create View***”, the following screen would appear.



- Click on “***Standard View***”. The following screen would appear.



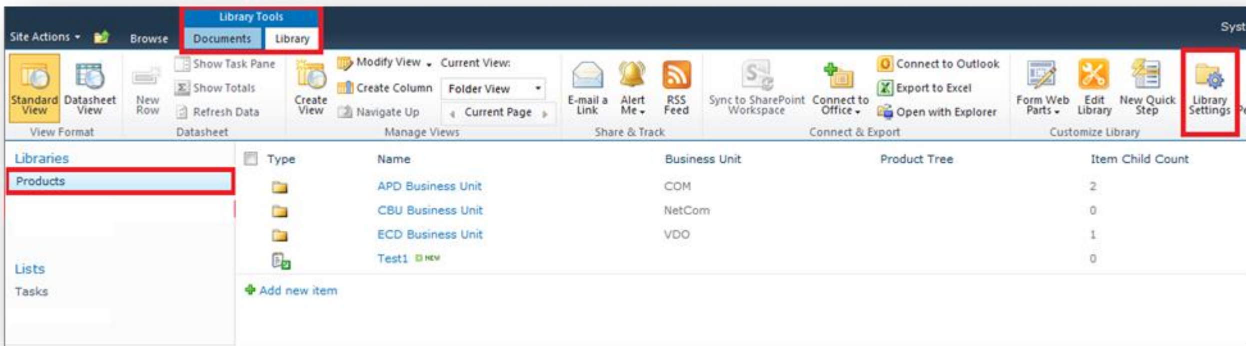
- Enter the view name as "**Folder *View"*** and select the check Box "***make this the default view option***."
- Under Columns section select the Type, Name, Business Unit, Product Tree, Item child Count columns
- Under "***Folder Section***" select" ***Show Items inside Folders***" option and "***In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



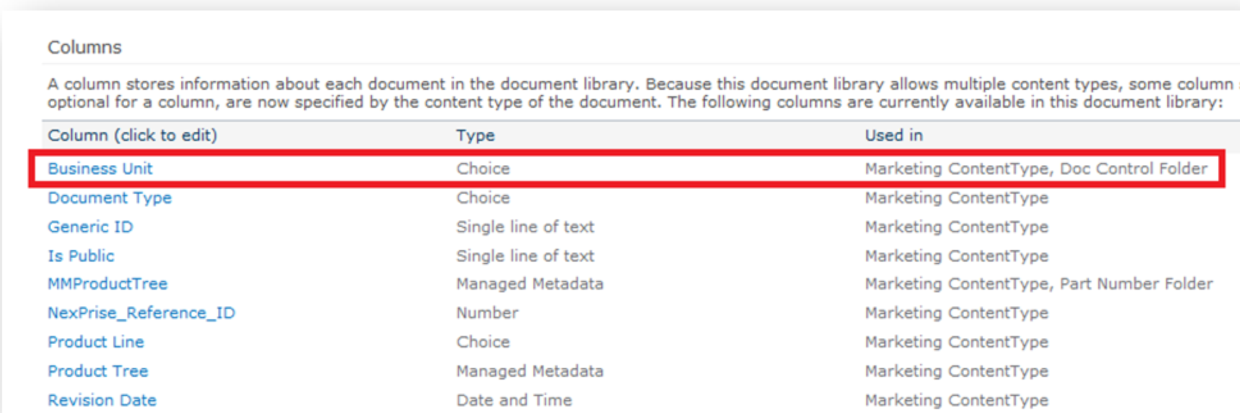
- Click on "***OK***" to create the Folder view in "***Product***" document library.

18.8 How to update the Options in Choice Columns?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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).



- 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.

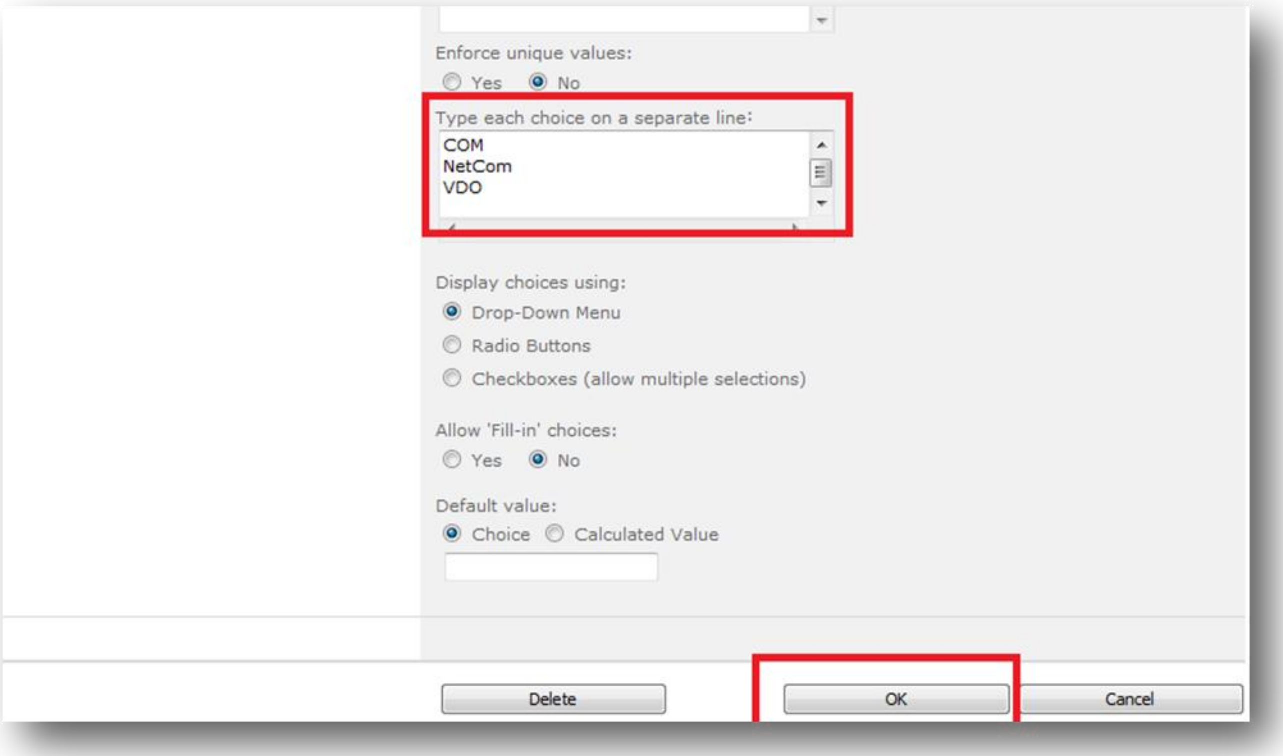


Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column s optional for a column, are now specified by the content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type	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

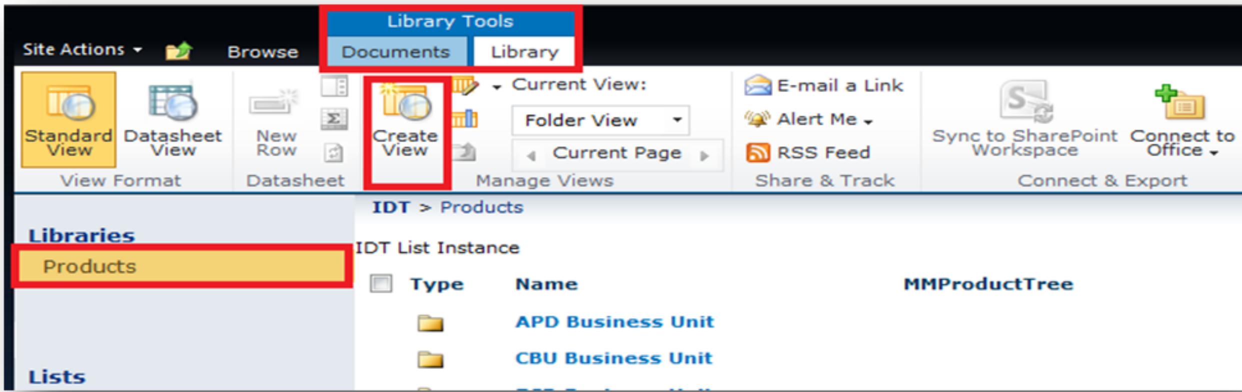


- New choice would now appear in “***Business Unit***” field.
- Since this business unit has some dependency for other functionalities as well, we need to make sure that as soon as we update the metadata in “***Business Unit***” field, we create a record in “***BusinessUnit***” and “***ProductLine***” 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.

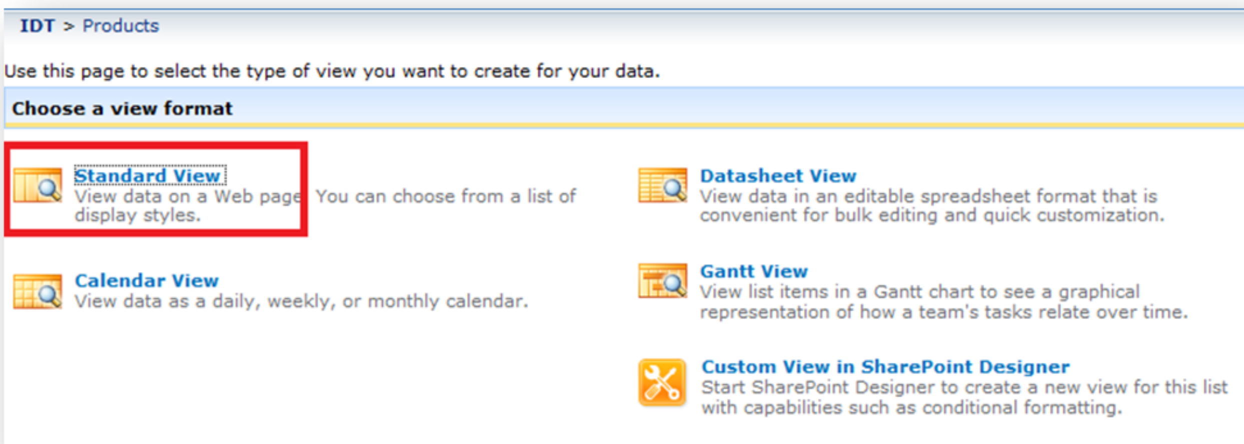
Choice Columns Fields	*Associated Lists to be Updated*
Business Unit	BusinessUnit, ProductLine
Document Type	DocType
Language	LanguageType

18.9 How to create Views for a Document Library?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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).

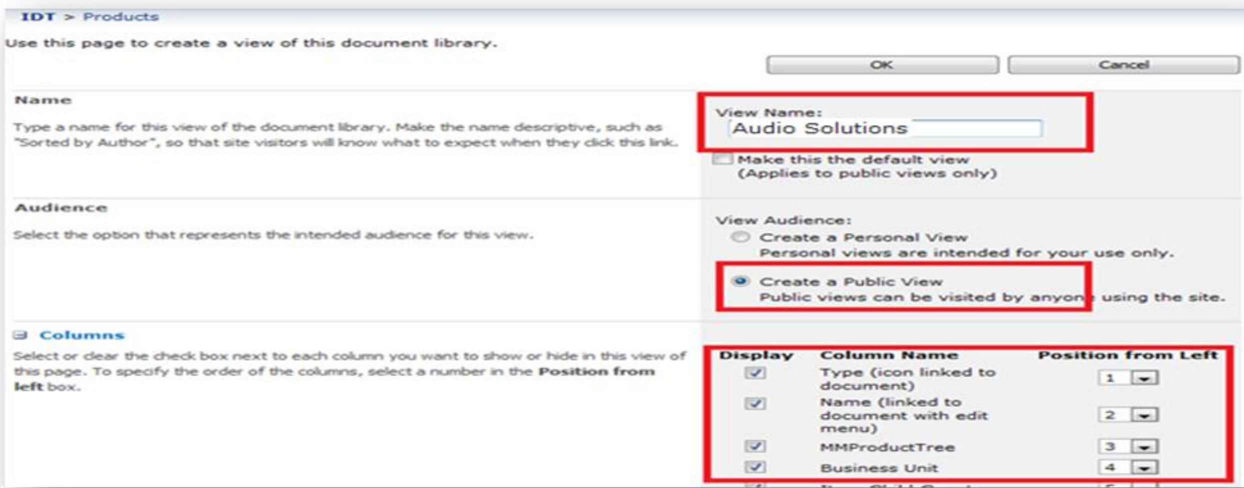


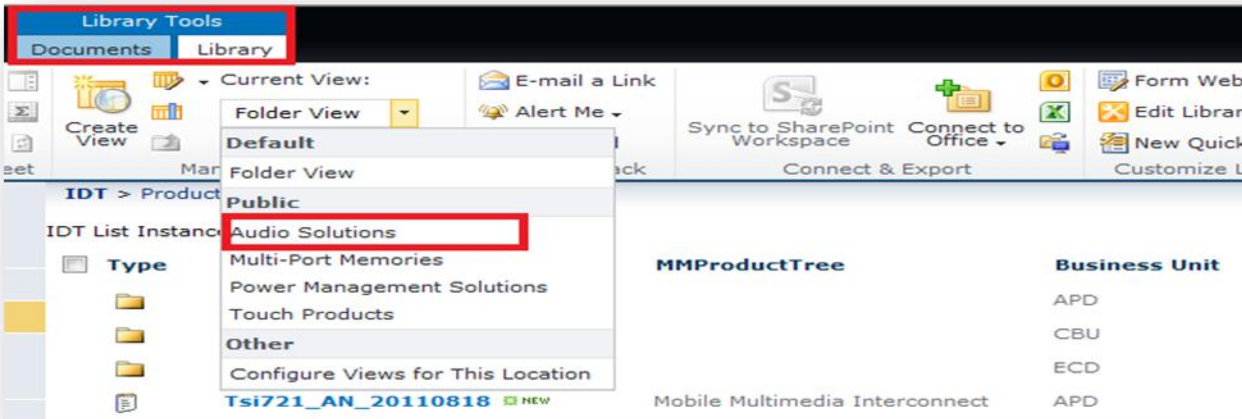
- After click of “***Create View***” icon, a new window would appear, as shown in below figure, providing users with different template of views available for creation.
- Select the template, appropriate for the requirement (in our case we are using “***Standard View***” template, as shown in fig).



- 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.

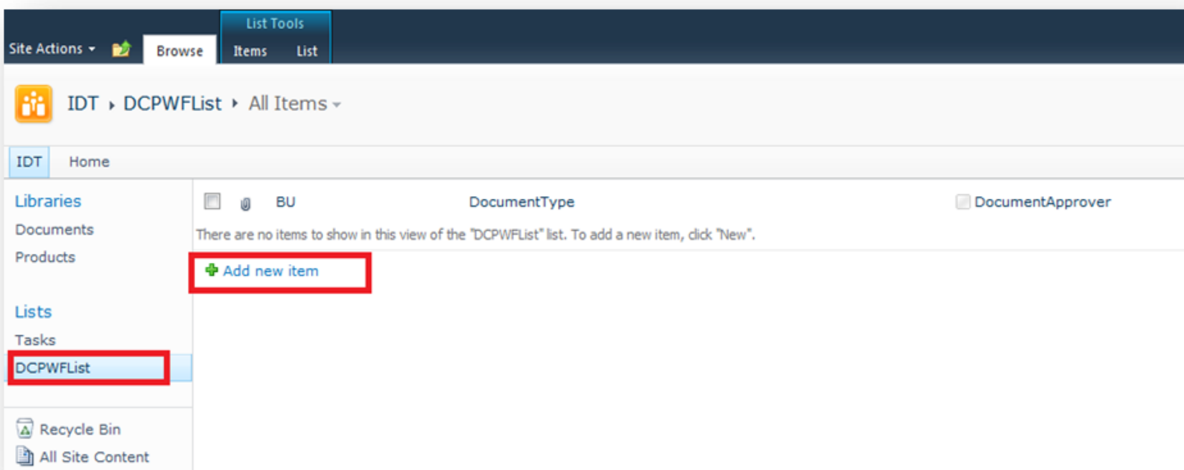
- If we scroll further down, we'll see "***Filter***" section (shown below in second fig.), where we can select the filter for the view, i.e., only those records would appear which will satisfy the filter criteria.
- More filters could be added by clicking "***Show More Columns…***" link (highlighted 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.).



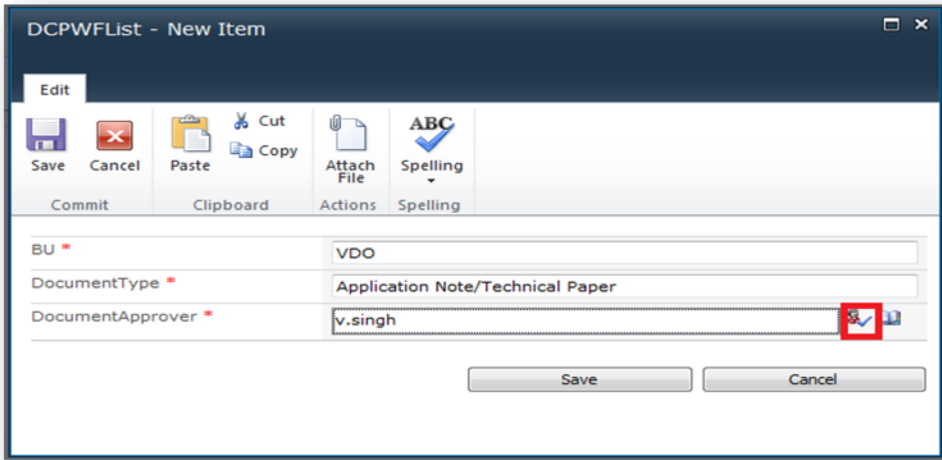


18.10 How to insert the values into a List?

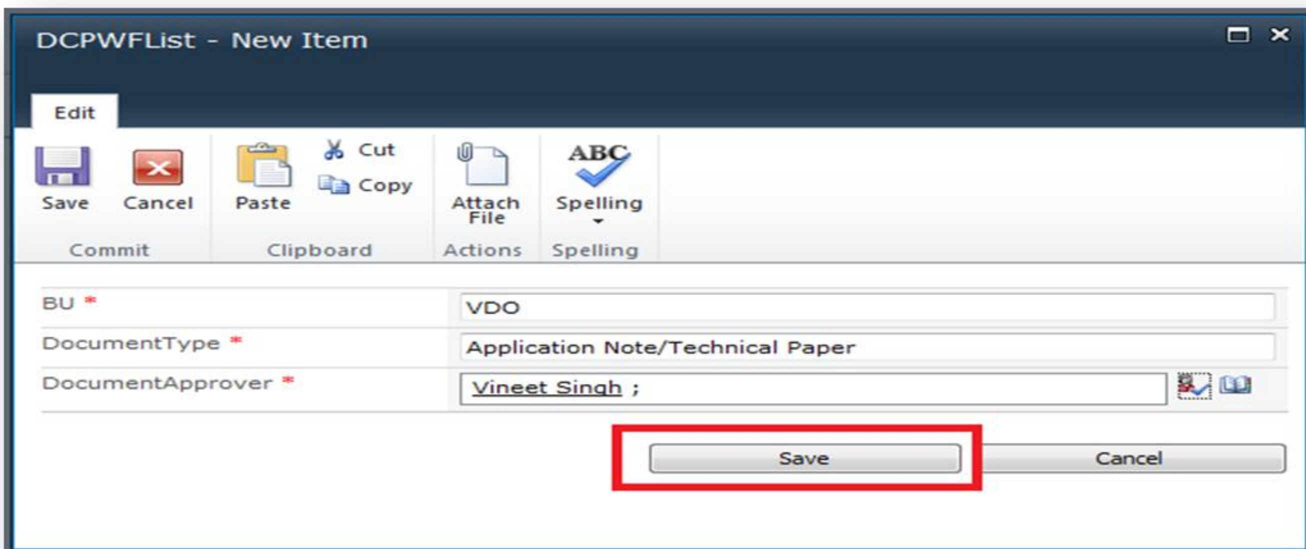
- Enter into the site, by typing the site URL (http://docs.idt.com) in browser.
- Click on the List name, present on left hand side of the site (also called left navigation bar), where we need to insert the values (shown in fig).
- Now click on "***Add new item***", present on the middle-right area of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



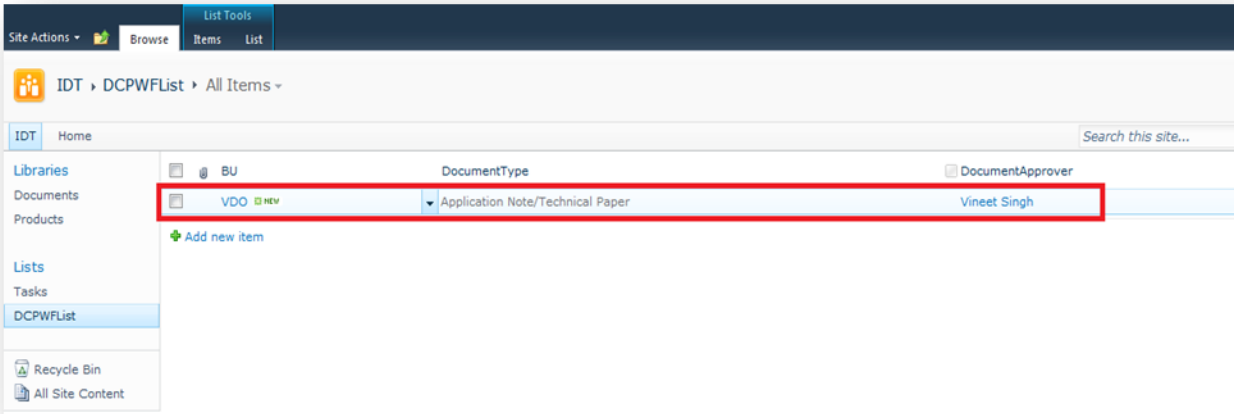
- Based on the fields present in the list, user would be prompted to enter the values. Please enter the correct values in the different columns (shown in fig.).
- If the list contains any field which requires us to enter the users' details, then we need to validate the user after entering the value. 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.



- Now click "***Save***" button to save the values.



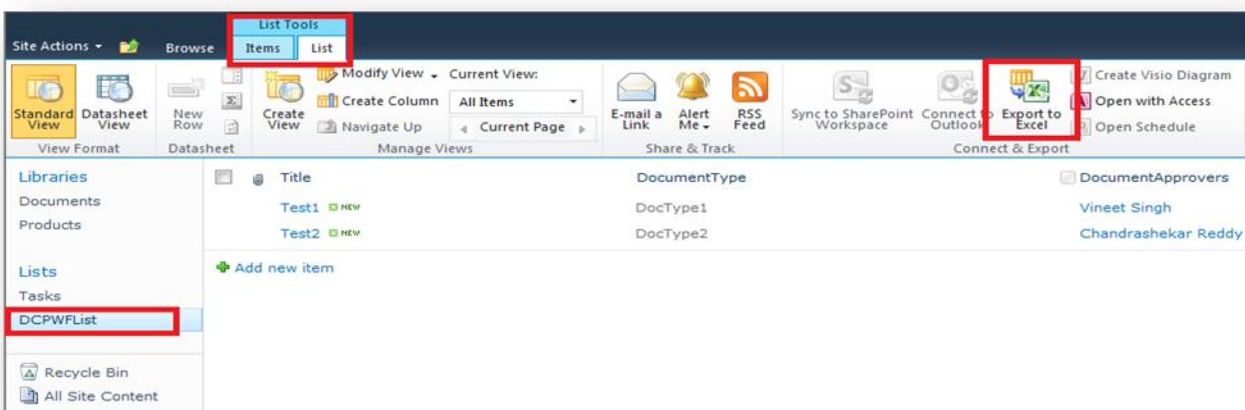
- A new record would be inserted to the list, as shown in the fig.



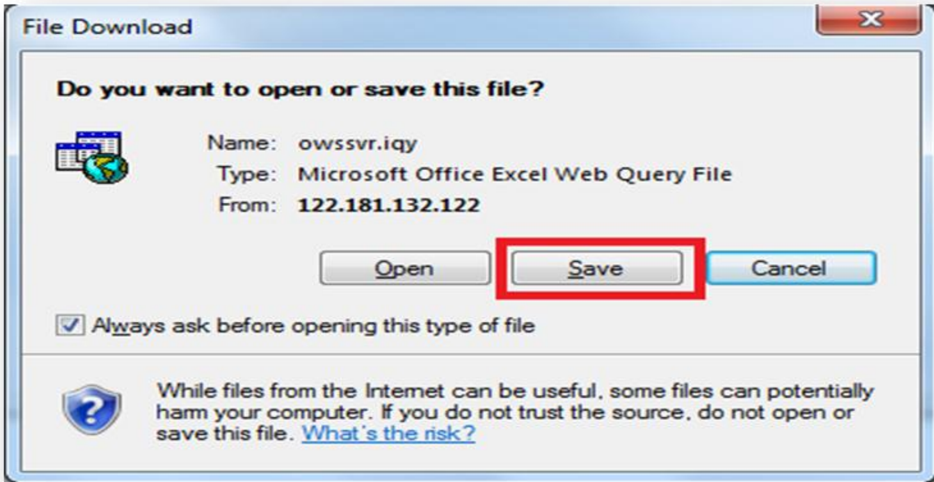
- NOTE: While entering the values, the fields marked in red * are mandatory and cannot be left blank.

18.11 How to Export the List data to an Excel?

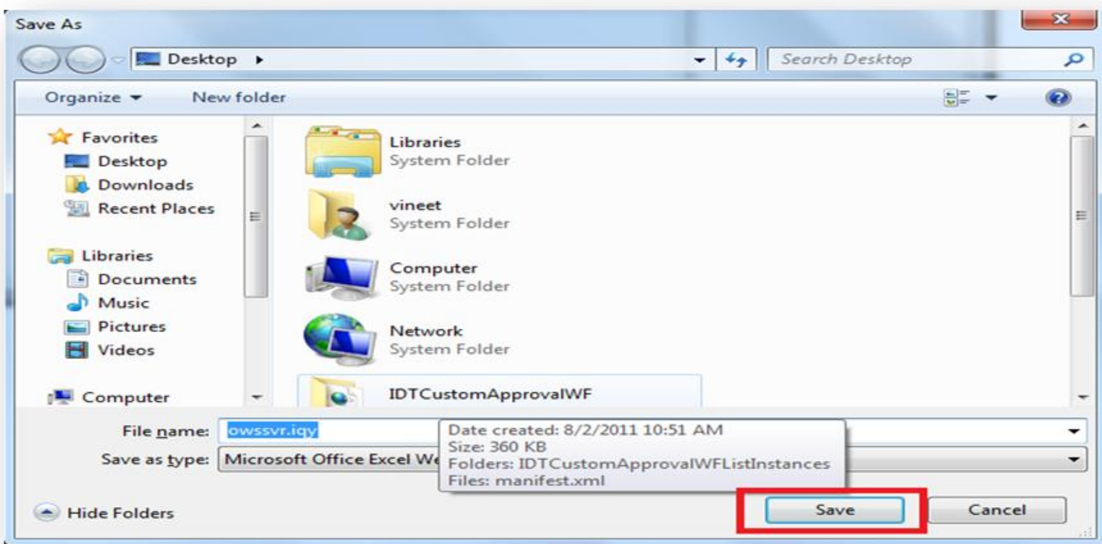
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the List name, present on left hand side of the site (also called left navigation bar), from where we need to export the data to excel (DCPWFList, in this case).
- Under the List Tools tab, in Ribbon control (as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



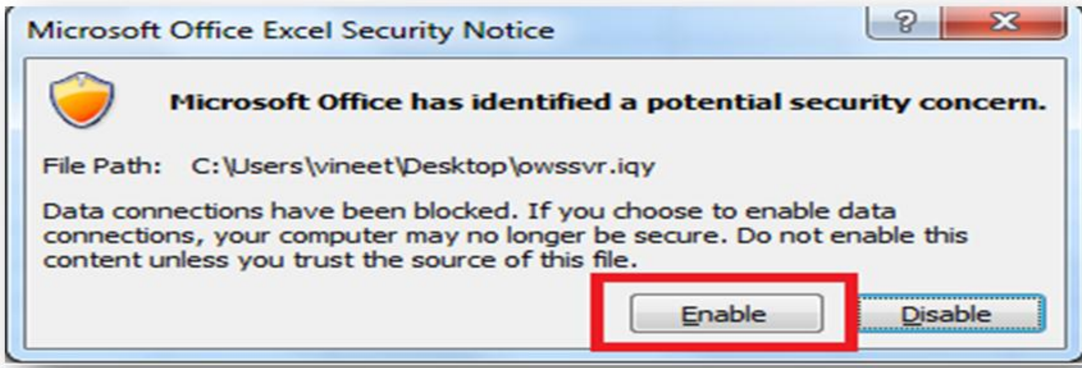
- A new window will appear prompting user to save the data, as shown in the below fig.
- Click on "***Save***" button to save the data.



- 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.



- 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 "***<u>Enable</u>***" button to continue.



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

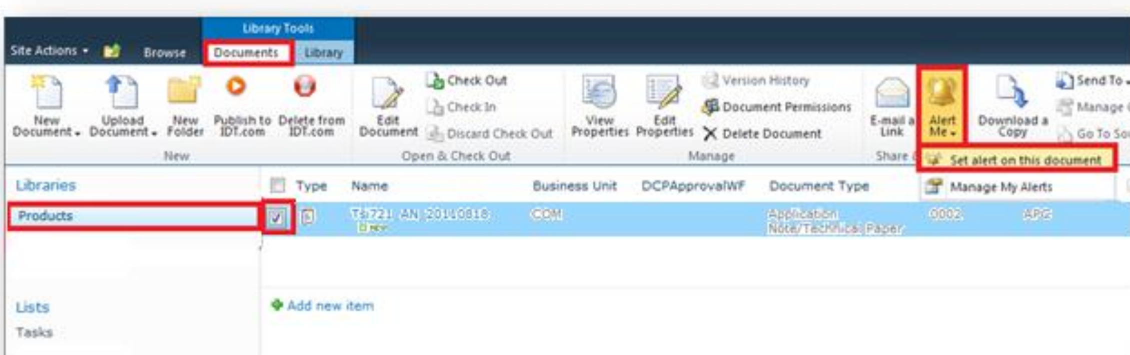
18.12 Alert Me:

18.12.1 What is “Alert Me”?

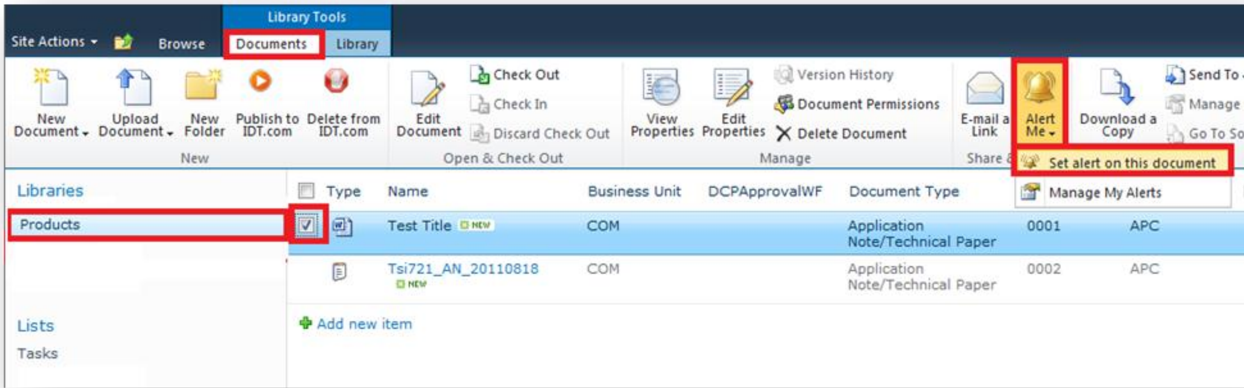
“Alert Me” provides a means of automatic communication to users as to what is happening in a Document Library/List using SharePoint via email/SMS alerts. “Alert Me”, if set, automatically sends an email/SMS, to the users, for whom this alert is configured.

18.12.2 How to set Alerts for Documents/Document Library?

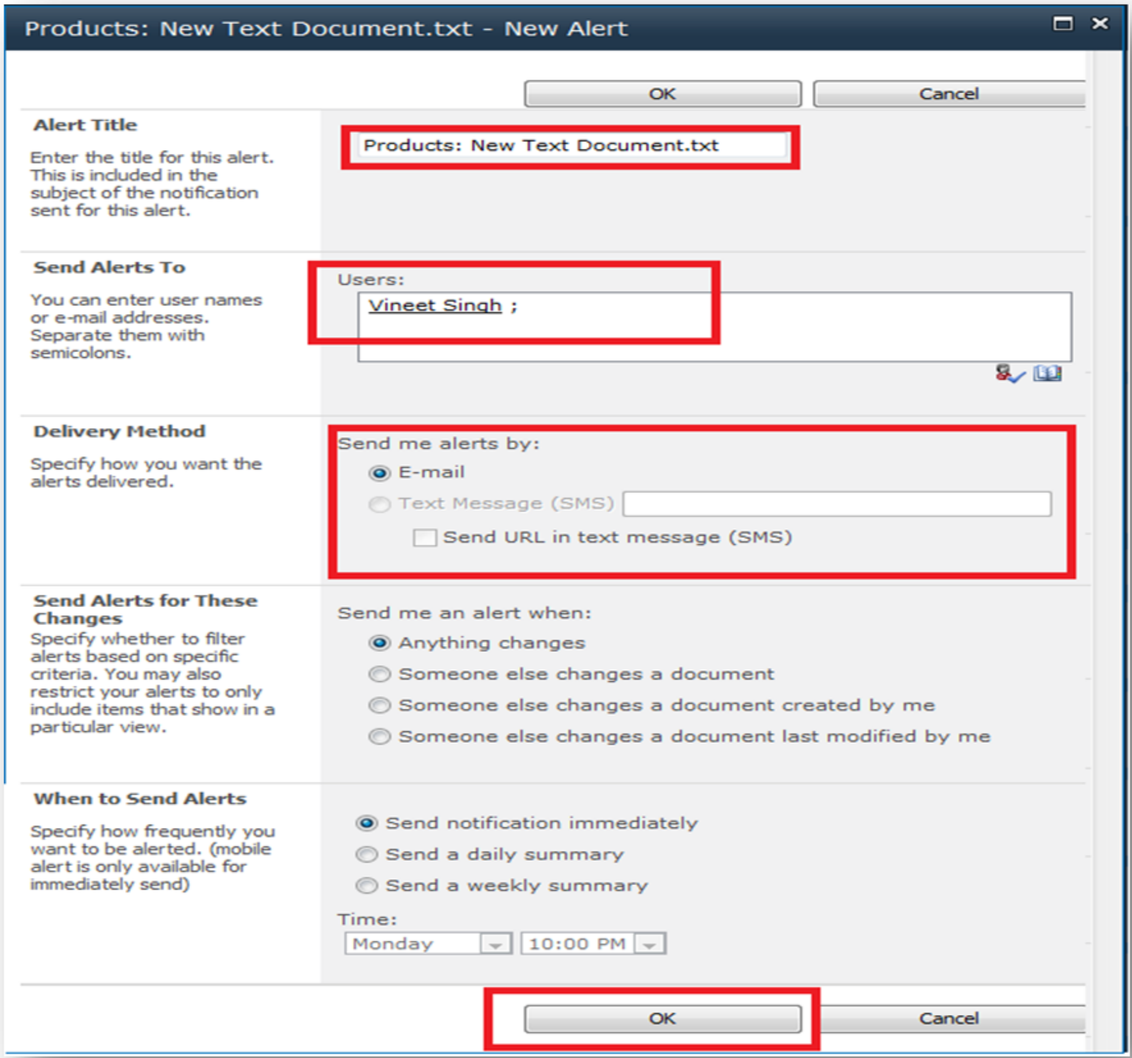
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar), where we need to Set the Alerts (Products Document Library, in this case).
- Under the Library Tools tab, in Ribbon 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).



- 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.

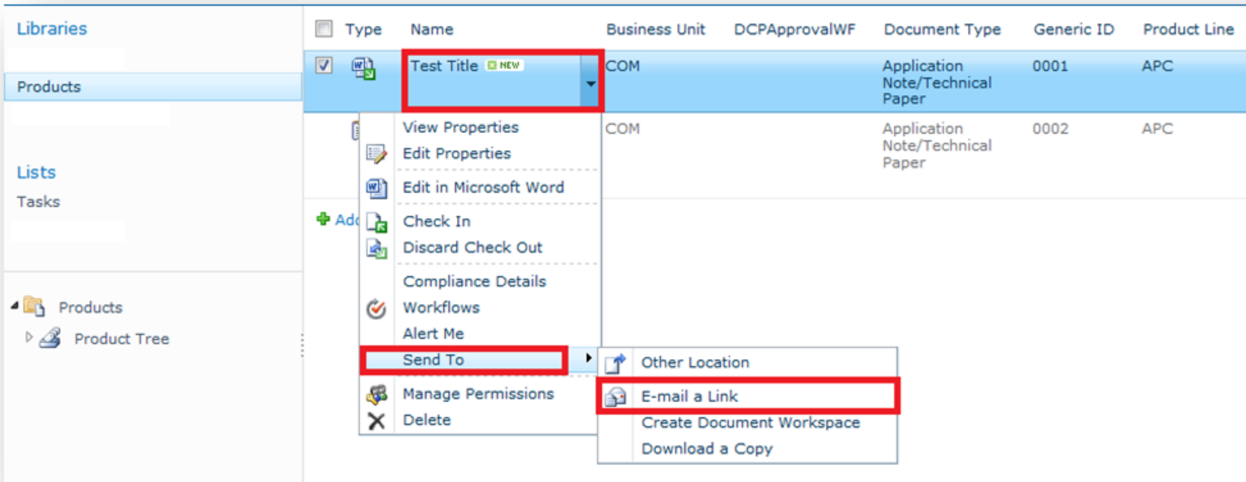


- Set the subject for the email, Users, who are suppose to be alerted, SMS/Email alert and rest of the values as shown in fig.
- Click on "***OK***" button to set the alert for the document.

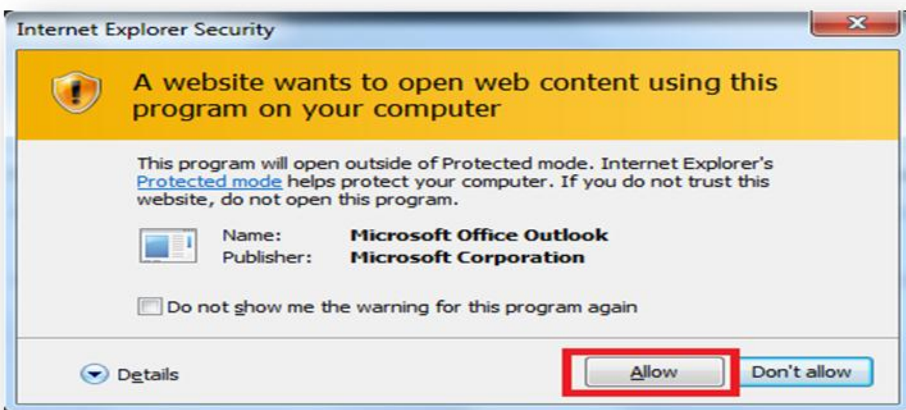


18.13 How to email a link?

- Enter into the site, by typing the site URL (http://docs.idt.com) 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.).



- 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 "***Allow***" Button to continue.



- 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 OOO 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.

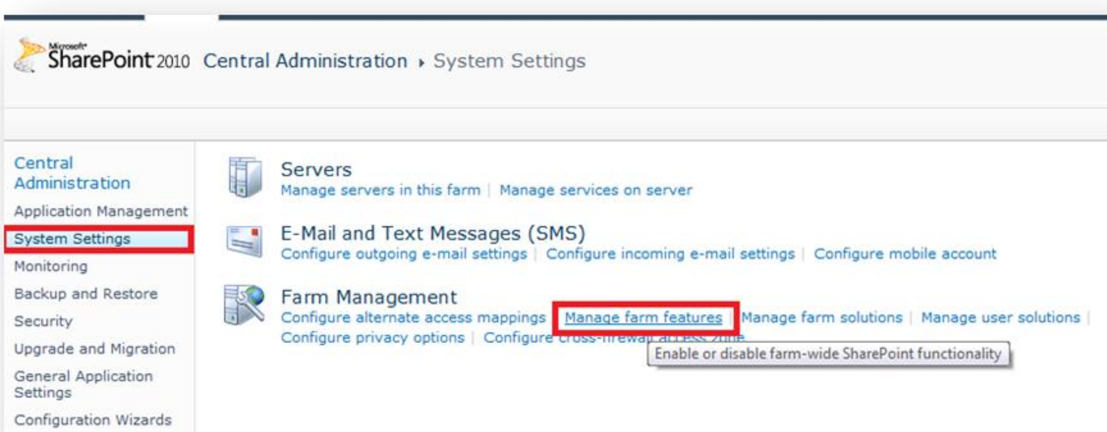
18.14.8 Hold ISO Tasks List:

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.

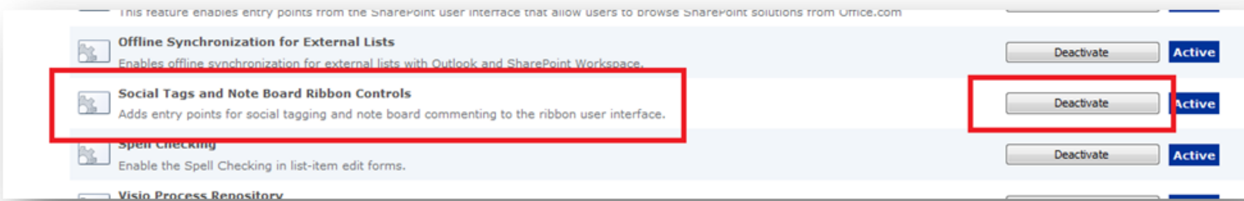
NOTE: For inserting data into these lists, please refer ***section 6.4***. For editing an Item from the list, please refer ***section 6.7***.

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.



- 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.



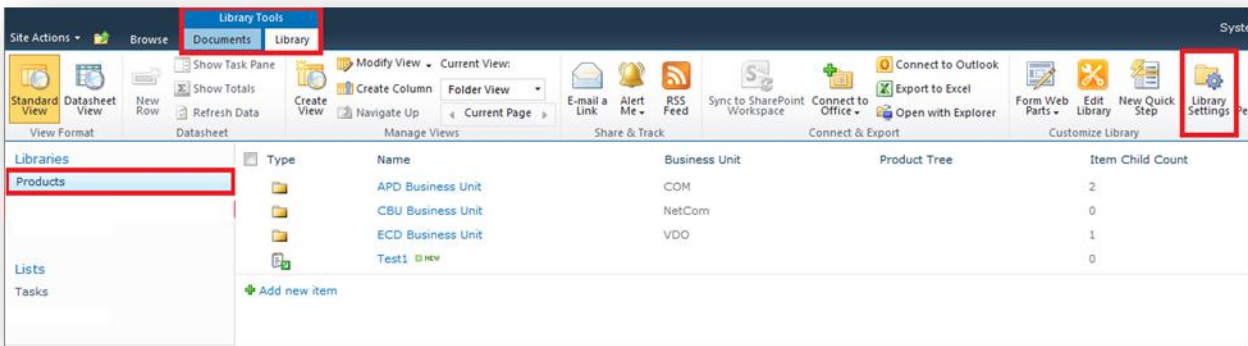
18.16 How to hide “Make Available to IDT.com” ribbon buttons on Server ribbon control?

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

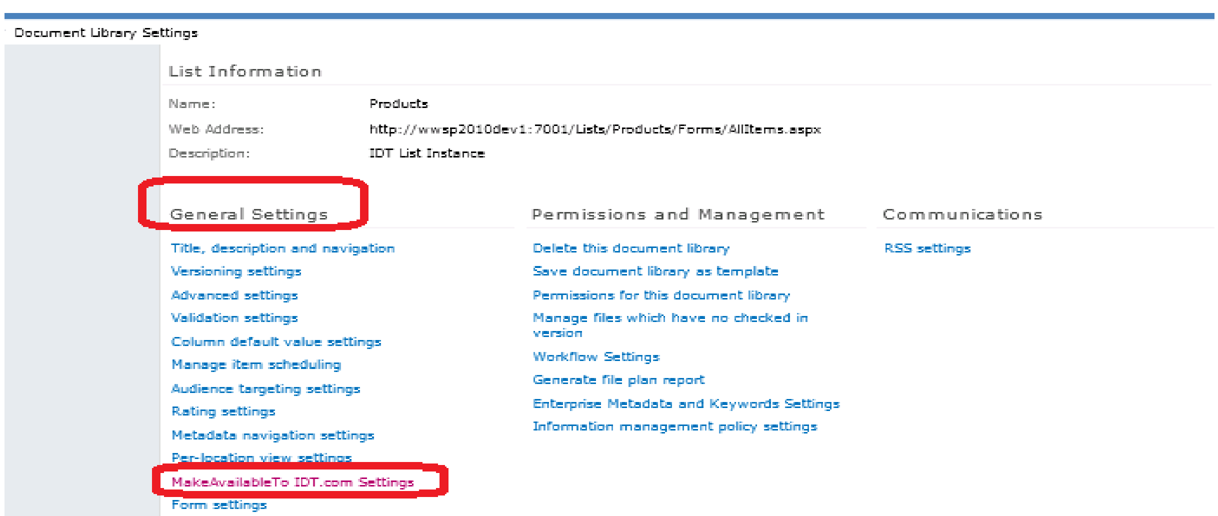
- MakeAvailableConfigList:
  - This list is used to store Names of all the Document Libraries in which "Make Available to IDT.com" feature is visible
  - This list has two columns. One is “Library Name” to capture name of the document library and another one is “Required” to capture whether library has “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.

18.17 How to insert values into “ MakeAvailableConfigList” List?

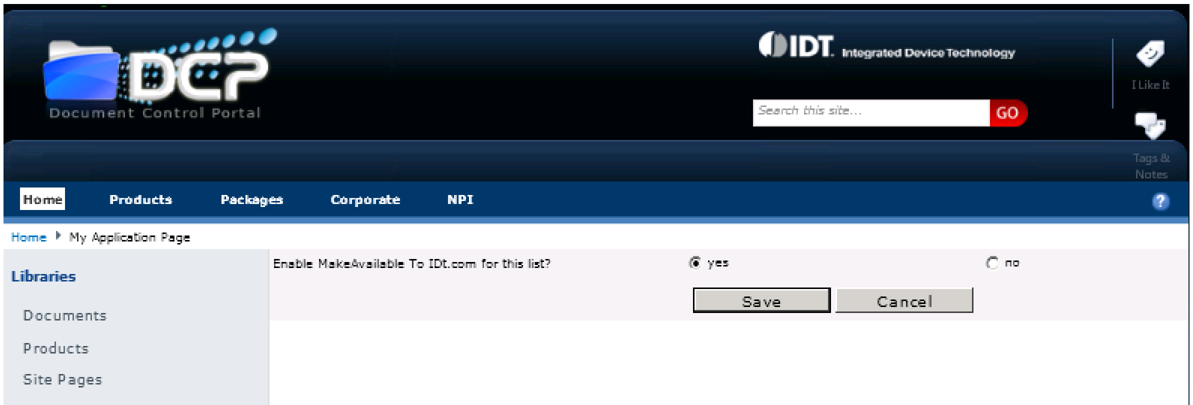
- Enter into the site, by typing the site URL (http://docs.idt.com) in Browser.
- Click on the Document Library name, present on left hand side of the site (also called left navigation bar).
- Under the Library Tools tab, in Ribbon control (as shown in fig.), Click on Library tab.
- From ribbon tab click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



- 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"



- 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.