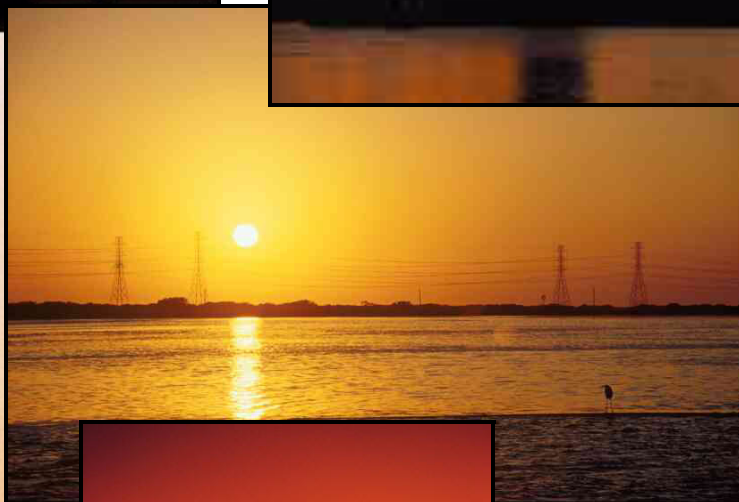
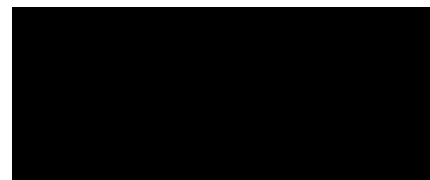


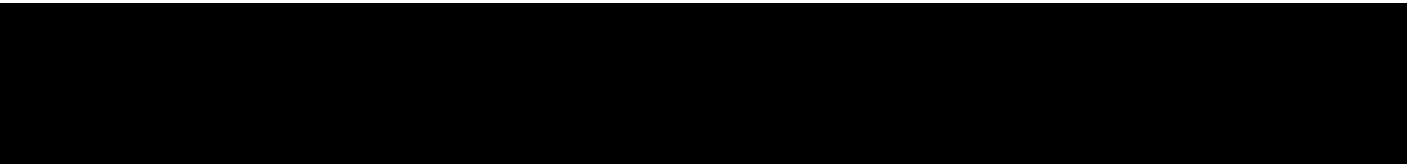


Generation Documentum

Issue Drawings for Release
(IDFR) User Guide

Issue 3.0
July 2008





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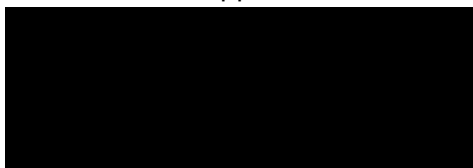
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or
Documentation Comments
for this application to:



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2 Verifying the IDFR Transmittal

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About this Document

Purpose

This document describes the process for up-revving engineering drawings in Documentum.

Reason for reissue

This is the third issue of this document. The reissue of this User Guide is due to IDFR enhancements to the Documentum application. Specific information regarding these enhancements is available in the latest Documentum Release Notes, located in the Release Notes for Documentum Users folder of the [REDACTED] Training and Reference Materials folder within Documentum.

Intended audience

The intended audience for this course and this document is anyone that will be using Documentum to issue drawings for release.

Conventions used

All documents written by the Application Support Methods & Tools (ASMT) group adhere to a standard set of document conventions. These conventions provide consistent communication of commands, keystrokes, and steps.

Icons



Warning

This icon indicates areas where readers may have trouble, and provides important information to help avoid problems.



Note

This icon is used when valuable supplemental information about a process or concept is needed.



Important

This icon is used for important information that the user must account for when performing a process.



Online Help

This icon indicates that more information about the topic can be found online and makes references to a Web page, online help, or an eLearning tutorial.



Beyond the Classroom...

This icon brings attention to information that applies to a process the student may use in Documentum's live production environment, but not in the training environment.

Document conventions

In order to make using and following step-by-step instructions easier, written document conventions are used as follows:

IF the items appear as...	THEN the items are...	For example:
this font	embedded as a description for a window, menu, form or screen.	The "Customer Input" window displays. The "Training Evaluation" form displays.
this font	anything you need to "Click."	Click the Save button. Click the Displays icon.
this font	anything you need to "Press."	Press Ctrl+d to return to a previous menu.
this font	anything you need to "Select" or "Enter."	Select the Pattern check box. Enter <code>ls -l</code> to view entries. Select the Format > Document > Change Bars menu option.
< angle brackets >	Variables. This font indicates a value should be entered.	The < hostname > is not responding.
this font	system output.	After the <code>Please wait...</code> message displays, you will receive a prompt asking for more input.
this font	an actual link.	Enter the following URL: http://www.aep.com

IF the items appear as...	THEN the items are...	For example:
this font	New Information in this revision of the User Guide.	This information is new to this revision.

Technical support

Help Services is available 24 hours a day, seven days a week. To receive assistance with this application, or to seek help regarding general workstation troubleshooting issues, contact the Help Desk by dialing Audinet or toll free .

How to comment

The Application Support Methods & Tools (ASMT) group is committed to providing each customer the best service possible. This document is designed to meet the specific needs of our customers and their constituents. Every effort is made to make this document as accurate and complete as possible.

We value your opinion and welcome your feedback. The ASMT team encourages you to contact us via e-mail () or telephone (Internal or External AEP:) to provide feedback about the contents of this document.





1 Issuing Drawings for Release

Objectives

In this lesson, you will perform the following steps:

- Create a profile ([Contentless Documents](#)).
- Submit or save a draft issue drawing for release ([IDFR](#)) transmittal.
- Find and process a [Draft IDFR Transmittal](#).
- View and print your draft IDFR transmittal.

Creating Profiles (Contentless Documents)

Purpose

The purpose of this section is to show you how to create “placeholder” [Profiles](#), which are known as contentless documents. These contain all of the properties for the drawings. They are necessary when you issue drawings that do not have an existing version (revision) in Documentum.

After the profiles are created, the hard copy drawings are delivered to [REDACTED] Imaging, who scan the drawings and upload the content into the contentless documents in [Documentum](#).



Important

If you are submitting an Issue Drawing for Release ([IDFR](#)) transmittal which contains only documents with existing revisions in Documentum, you do not need to complete this step.

Before you begin

Log into Documentum.

Instructions

To create profiles (contentless documents):

1. In Documentum’s main menu bar, select **File > New > Document**.
2. Select [REDACTED] **Engineering** from the **Type** drop-down menu.

Reference: When you select [REDACTED] **Engineering** as the document type, the **Name** field defaults to **AUTONAMING**. Engineering files are named automatically using a set of key properties. For example, drawing [REDACTED].tif is automatically named using the following elements:

Naming Element	Naming Convention
[REDACTED]	Plant ([REDACTED])
2	Unit
[REDACTED]	Company
9219	Drawing Number
11	Revision Number

3. Select **None** in the **Format** drop-down menu.

Result: The **New Document: Create** page should look like this:

New Document: Create

1. Create 2. Info

gendoctst1/Brian R Bolden

Name: AUTONAMING-1213734148377 *

Type: Engineering (engineering)

Format: None

[\[+\] Show options](#)

Previous Next Finish Cancel

4. Click **Next**.

Result: The **New Document: Info** page appears:

New Document: Info

1. Create 2. Info

gendoctst1/Brian R Bolden

Generation

Company: *

Plant/Location: *

Unit: *

Document Number: *

Title: *

Revision Number: *

Revision Date (MM/DD/YYYY): Date, Hour, Minute, Second *

Project Type:

Project ID: [Edit](#)

Work Order: [Edit](#)

Work Breakdown Structure:

Engineering

Sheet Size: *

System:

Cross Reference Number:

Status: *

IDFR Transmittal Number:

Info

Name: autonaming-1213793391144

Subject:

Keywords: [Edit](#)

Authors: [Edit](#)

Full Content Size: 0

Owner Name: [Edit](#) Brian R Bolden

Version Label: [Edit](#) 1.0, CURRENT

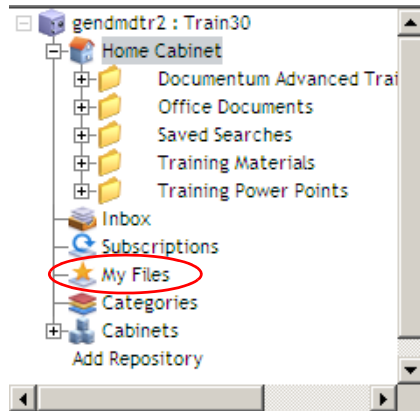
Lock Date: Jun 18, 2008 8:50:24 AM

Lock Owner: Brian R Bolden

[?](#) [Finish](#) [Cancel](#)

5. Fill in all required fields and click **Finish**.

Result: You have successfully created a contentless  document as a placeholder for your new drawing. To verify that the contentless document exists in Documentum, check the **My Files** folder. This folder displays all documents that you have created or edited in the past 30 days.



6. Repeat the above steps to create additional contentless documents.



Creating an Issue Drawings For Release Transmittal

Purpose

The purpose of this section is to show you how to create an [IDFR Transmittal](#).

Before you begin

Before you begin this procedure you must:

- Log into [Documentum](#).
- Create all contentless profiles associated with your IDFR Transmittal.
- Locate the drawings/profiles for the IDFR Transmittal.

Instructions

To create an IDFR Transmittal:

1. Click the check boxes beside the documents you want to include in the IDFR Transmittal.

Hint: You can add additional documents to the IDFR Transmittal after it is saved.

2. Select Tools > Issue Drawings for Release > Create a transmittal.



Result: An **Issue Drawing for Release** page similar to the one below opens:

Issue Drawing for Release

Info Distribution Drawing Summary

Name: [Redacted]-DMS-000302

[Redacted] Order Number: [Redacted]-DMS-000302

[Redacted] Plant/Location: [Redacted]

Version Label: [Edit](#) 1.0, CURRENT

Owner Name: [Edit](#) Brian R Bolden

[Redacted] Account Number: *

[Redacted] Activity Code: *

[Redacted] BBU: *

[Redacted] Department ID: *

[Redacted] FBU: Generation

[Redacted] GL Business Unit: *

[Redacted] Distribution Type: [Edit](#) *

[Redacted] Originating Engineer: *

[Redacted] Project ID: [Edit](#) *

[Redacted] Work Order Number: [Edit](#) *

[Redacted] Benefiting Location:

[Redacted] Cost Component Number:

[Redacted] Reproduction Instructions:

[Redacted] Transmittal Description:

? Submit Previous Next Save As Draft Cancel

3. Add values in all required fields. If you have values for the non-required fields, enter those as well.



Important

You must enter valid project ID and work order number information in the “**Project ID**” and “**Work Order Number**” property fields. These properties are validated against PeopleSoft values.

The “**Work Order Number**” consists of a combination of the PeopleSoft work order number and work order task. For example, if your work order number is “WSN100594” and your work order task is “01,” the combination you would create is “WSN10059401.”

4. Write down the **Order Number** to locate the IDFR Transmittal after it is saved.
5. In the **Distribution Type** field, click the **Edit** link.

Distribution Type: [Edit](#) *

Result: The **Distribution Type** page appears:

6. Select the appropriate **Distribution Type(s)** and click **Add**.

The following Distribution Types are available:

- **As-Built**—This distribution list type is comprised the same way as Standard distribution lists, except that the recipient generally receives fewer copies for a designated drawing type.
- **Custom**—This distribution list type is comprised of recipients that receive drawing copies associated with a specific Project ID. The Custom Distribution list can contain Standard Distribution list recipients.
- **Standard**—This distribution list type consists of recipients who receive copies of drawings issued within the IDFR process. These recipients can be part of a project distribution list, but are not always associated with a Project ID.



Note

When you select **Standard** or **As-Built** as the distribution type, the associated **Recipient Print Specifications** are matched to the drawings' **Plant/Location**, **Discipline**, **Drawing Type**, and **Original Size** properties.

When you select **Custom** as the distribution type, the associated Recipient Print Specifications are first matched to the project ID value that you enter in the **Project ID** field, then to the drawings' **Discipline**, **Drawing Type**, and **Original Size** properties.

For more information about Recipient Print Specifications, refer to the *Recipient Print Specification User Guide*.

Hint: If you select a distribution type in error, highlight it and click **Remove**.

7. Click **OK**.
8. Complete the remaining fields on the **Issue Drawing for Release: Info** page.
9. Enter necessary information in the **Reproduction Instructions** and the **Transmittal Description** fields.



Note

The **Reproduction Instructions** are included to give **Imaging (Print Services)** instructions for processing the IDFR Transmittal. The **Transmittal Description** field should include a description of why you are creating the IDFR Transmittal.

10. Click **Next**.



Important

When navigating the **Issue Drawing for Release** page, make sure that you click the **“Next”** or **“Previous”** buttons rather than clicking on the page heading tabs. If you navigate by clicking on the page heading tabs, Documentum will generate an error when you attempt to submit your IDFR.

Result: The **Distribution** tab appears.

Issue Drawing for Release

Info Distribution Drawing Summary

Distribution

10

First and Last Name	Email	Address	Original Size	Finish Size	Copies	Product Type	Distribution Type	Drawing Type	Discipline	Project ID
☐ Brian R Bolden			G (30"x 46")	G (30"x 46")	2	BW	Custom	ALL	Electrical Engineering	WSN100594
☐			G (30"x 46")	B (11" x 17")	3	BW	Custom	ALL	Electrical Engineering	WSN100594
☐			G (30"x 46")	B (11" x 17")	4	BW	Custom	ALL	ALL	WSN100594

New Remove

Submit Previous Next Save As Draft Cancel

Result: A [Distribution List](#) appears based on the properties for the IDFR Transmittal.

- 11. Verify the distribution information.
- 12. If you need to remove a recipient from the current IDFR only, click the associated check box and click **Remove**.

13. Click **New** to add recipients.

Result: The [Adhoc Distribution List](#) function appears:

The screenshot shows the 'Issue Drawing for Release' dialog box with the 'New Recipient' tab selected. The form includes the following fields and controls:

- First and Last Name**: Text input field with a red asterisk.
- Email**: Text input field with a red asterisk.
- Street**: Text input field with a red asterisk.
- Street 2**: Text input field.
- City**: Text input field with a red asterisk.
- State/Zip**: Two text input fields with a red asterisk.
- Comments**: Text area.
- Original Size**: Dropdown menu with 'ALL' selected.
- Finish Size**: Dropdown menu with 'A (8 1/2" x 11")' selected.
- Copies**: Text input field with a red asterisk.
- Product Type**: Dropdown menu with 'BW' selected.
- Discipline**: Dropdown menu with 'ALL' selected.
- Drawing Type**: Dropdown menu with 'ALL' selected.
- Distribution Type**: Dropdown menu with 'Custom' selected.
- Project ID**: Dropdown menu with 'WSN100594' selected.
- Save Recipient Permanently**: Check box (unchecked).
- Add Recipient**: Button, circled in red.
- Cancel**: Button.

At the bottom of the dialog, there are buttons for 'Submit', 'Previous', 'Next', 'Save As Draft', and 'Cancel'.

14. Fill in recipient's distribution information and click **Add Recipient**.



Note

By default, Ad Hoc recipients are added only for the associated IDFR Transmittal. However, you can make the recipient permanent by clicking the **Save Recipient Permanently** check box.

Result: The [Distribution List](#) updates.

15. Repeat [Step 13](#) and [Step 14](#) until all necessary recipients are added.



Note

For more information on maintaining Recipient Print Specifications, refer to the *Recipient Print Specification User Guide*.

16. Click **Next**.

Result: A **Drawing** tab similar to the one below appears:

Issue Drawing for Release

Info

Distribution

Drawing

Summary

Drawings

Total Drawings : 4

	Document Number	Title	Drawing Type	Size	Discipline	Unit	Current Revision	Revision Date	New Revision Up Rev	New Revision Date (mm/dd/yyyy)	Reference Only	Apply All
☐	1301	DIAG 120/208V AC & 208V DC L	Physical Drawing	G	Electrical Engineering	2	2				☐	
☐	1309	ASSY & DTL 550 VAC/250 VDC M	Physical Drawing	G	Electrical Engineering	2	13				☐	
☐	1313	550 VAC/250 VDC M & VCC TAB	Physical Drawing	G	Electrical Engineering	2	13				☐	
☐	1310	ASSY & DTL 550 VAC/250 VDC M	Physical Drawing	G	Electrical Engineering	2	11				☐	

?

Submit

Previous

Next

Save As Draft

Cancel

***Hint:** Fill out this page entirely before proceeding to the next page.*

The following columns contain editable fields:

Column	Description
	The check boxes in this column let you select drawings for deletion. After you have selected a drawing, click Apply All to delete it.
Title	The fields in this column let you edit the Title of each drawing.
New Revision	The fields in this column let you enter new revision numbers for drawings being updated. You can use the Up Rev button to populate the revision field for each drawing in the transmittal. The revision field is calculated using the following business rules: • If the current revision is numeric, the revision is increased by 1 (for example, revision 4 would go to revision 5). • If the current revision is an alphabetic character, it is converted to 0. The revision fields are editable. Changes are made after you click the Up Rev button. This button can only be used once per transmittal (clicking the button multiple times will not up-rev the drawings multiple times).
New Revision Date	The fields in this column let you manually enter revision dates or click the revision date button to automatically enter one for all drawings in the transmittal. If necessary, you can manually edit the dates.



Column	Description
Reference Only	The check boxes in this column are marked if: - You are submitting a drawing that is not being up-revved and does not need to be scanned. - The entire IDFR is intended for print only (not scanned or up-revved).
Apply All	Click Apply All to save and apply the information.

The screenshot shows a table with three main columns: **New Revision**, **New Revision Date**, and **Reference Only**. Under **New Revision** is an **Up Rev** button. Under **New Revision Date** is a date input field with a placeholder **(mm/dd/yyyy)**. Under **Reference Only** are four checkboxes. To the right of the table is a red circle highlighting an **Apply All** button.

- In the **New Revision** fields, enter the new revision numbers, or click the **Up Rev** button.
- In the **New Revision Date** fields, enter the new revision dates, or click the **(mm/dd/yyyy)** button to set the same date for all the drawings.



Important

When you enter values in the “Title,” “New Revision,” and “New Revision Date” fields, the following notifications appear reminding you to click the Apply/Apply All button.

Drawings										
Total Drawings : 3										
	Document Number	Title	Drawing Type	Size	Discipline	Unit	Current Revision	Revision Date	New Revision Up Rev	New Revision Date (mm/dd/yyyy)
☐	5004	FLOW DIAG STANDARD SYMBOLS	Flow Diagram (P&ID)	G	Mechanical Engineering	123	2	05/01/1997	3	7/8/2008
You have unsaved changes. Please click Apply/Apply All to save the changes.										
☐	5004	FLOW DIAG STANDARD SYMBOLS	Flow Diagram (P&ID)	G	Mechanical Engineering	46	1	05/01/1997	2	7/8/2008
You have unsaved changes. Please click Apply/Apply All to save the changes.										
☐	5004	FLOW DIAG WTR SUPPLY SYS	Flow Diagram (P&ID)	G	Mechanical Engineering	56	5	07/05/1996	6	7/8/2008
You have unsaved changes. Please click Apply/Apply All to save the changes.										

Make sure that you click Apply/Apply All, or else the drawings will not up-rev.

19. Click the **Reference Only** check boxes for the drawings that you are not up-revving.



Note

It is recommended that you verify that the Project ID is valid on Reference Only documents in your IDFR Transmittal. When a Reference Only document with an invalid project ID is submitted in an IDFR Transmittal, an error message is sent to Print Services letting them know about the invalid ID. Print services must then contact the person submitting the IDFR and request that he/she fix the project ID. The ID must be valid for the IDFR Transmittal process to finish.



Important

Make sure that all leading zeroes are included in the Reference Only document “Project ID” fields. Otherwise, the Project IDs will be flagged as invalid during the IDFR validation process. Verify the Project ID values by going to the “Properties” page for each Reference Only document.

Properties: Info

am_2_122083_1.tif
Type: aep_engineering
Format: tiff

Company: [Redacted]
Plant/Location: [Redacted]
Unit: 2
Document Number: 122083
Title: KEY DIAGRAM
Revision Number: 1
Revision Date (MM/DD/YYYY): Jan 18, 2008
Project Type: FGD
Project ID: Edit 8932
Work Order: Edit
Work Breakdown Structure: A6109

Project ID: Edit 8932
You should add leading zeroes to the above Project ID (as in the following Project ID) to avoid IDFR validation errors.
Project ID: Edit 000008932

OK Cancel

20. Click **Apply All**.
21. Click **Next** to continue.

Submit Previous **Next** Save As Draft Cancel

Result: The **Summary** tab opens and provides a complete list of all drawings you are issuing as well as any associated reference documents.

Issue Drawing for Release

Info Distribution Drawing **Summary**

10

Unit	Document Number	Revision	Revision Date	Recipient	No. of Copies	Finish Size	Product Type	Description
2	1301	2	nulldate		4	B (11" x 17")	BW	Physical Drawing
2	1301	2	nulldate		3	B (11" x 17")	BW	Physical Drawing
2	1301	2	nulldate	Brian R Bolden	2	G (30"x 46")	BW	Physical Drawing
2	1309	13	nulldate		4	B (11" x 17")	BW	Physical Drawing
2	1309	13	nulldate		3	B (11" x 17")	BW	Physical Drawing
2	1309	13	nulldate	Brian R Bolden	2	G (30"x 46")	BW	Physical Drawing
2	1313	13	nulldate		4	B (11" x 17")	BW	Physical Drawing
2	1313	13	nulldate		3	B (11" x 17")	BW	Physical Drawing
2	1313	13	nulldate	Brian R Bolden	2	G (30"x 46")	BW	Physical Drawing
2	1310	11	nulldate		4	B (11" x 17")	BW	Physical Drawing
2	1310	11	nulldate		3	B (11" x 17")	BW	Physical Drawing

Submit Previous Next Save As Draft Cancel

22. Verify that all of the information under the summary tab is correct.



Note

Click **Previous** to edit information on another tab. Select **Save As Draft** to return to Documentum and fix the documents.

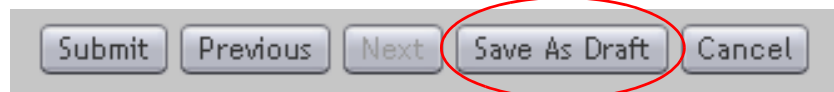
23. Perform one of the following steps:

- a. If you are finished with your transmittal, click **Submit**.



Result: The **IDFR Transmittal** is sent to [REDACTED] *Imaging*.

- b. If you are not finished with your transmittal, click **Save As Draft**.



Result: Your **IDFR Transmittal** saves as a draft, and it is NOT submitted to [REDACTED] *Imaging*.



Warning

You cannot use IDFR to place an old revision into an existing version tree. In this case, the following validation error message appears when you click submit:

“A document with the same Plant, Unit, Company, and Document Number exists in Documentum that has a later revision date. This document cannot be issued.”

If you receive a validation error, go to section **“Correcting Validation Errors” (1-25)**.



Processing a Draft IDFR Transmittal

Purpose

The purpose of this procedure is to:

- Locate your [Draft IDFR Transmittal](#).
- Attach additional drawings to your draft IDFR transmittal.
- Submit your draft IDFR transmittal.
- Correct any errors that occur during draft IDFR transmittal processing.

Before you begin

Before you begin this procedure:

- Create a draft IDFR transmittal. For more information, refer to "[Creating an Issue Drawings For Release Transmittal](#)" (1-6).
- If you need more profiles for Contentless Documents created; do that before beginning this procedure. For more information, refer to "[Creating Profiles \(Contentless Documents\)](#)" (1-2).



Note

Your IDFR Transmittal saves as a Virtual Document. For more information about [Virtual Documents](#), please consult "Appendix C Working with Virtual Documents" in the *Generation Documentum User Guide*.

Instructions

Perform the following steps to process a draft IDFR transmittal:

1. Open the **Advanced Search** page and search for the documents you need to add to the draft IDFR Transmittal. Include any contentless profiles you have not yet attached.
2. Click the boxes next to the appropriate documents and select **Add To Clipboard**.



3. Continue finding and adding items to the [Clipboard](#) until you have captured everything you need to add to your draft IDFR transmittal.

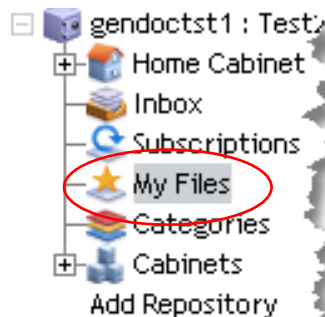


Note

You can include up to 1000 items in the clipboard at the same time. The items remain in the clipboard until you add them to a new location, or log out and back into Documentum. Once you have added 1000 items, you must clear the clipboard before adding more. You can view the Clipboard by selecting **Edit > View Clipboard**.

Clipboard					
[Remove]		Items per page 10			
☐	Name	Format	Version	Repository	
☐	am_0_30101w_1.tif	TIFF Image	CURRENT,2.0	gendoctst1	
☐	am_0_30101x_0.tif	TIFF Image	CURRENT,1.0	gendoctst1	
☐	am_0_30201a_1.tif	TIFF Image	CURRENT,3.0	gendoctst1	
☐	am_0_30201b_1.tif	TIFF Image	CURRENT,3.0	gendoctst1	
☐	am_0_31110_3.tif	TIFF Image	CURRENT,6.0	gendoctst1	

- Once you copy all of drawings to the clipboard, click **My Files** located in the folder structure of your **Home Cabinet**.



Result: Any draft IDFR Transmittals you have saved within the past month appear:

My Files (gendoctst1)

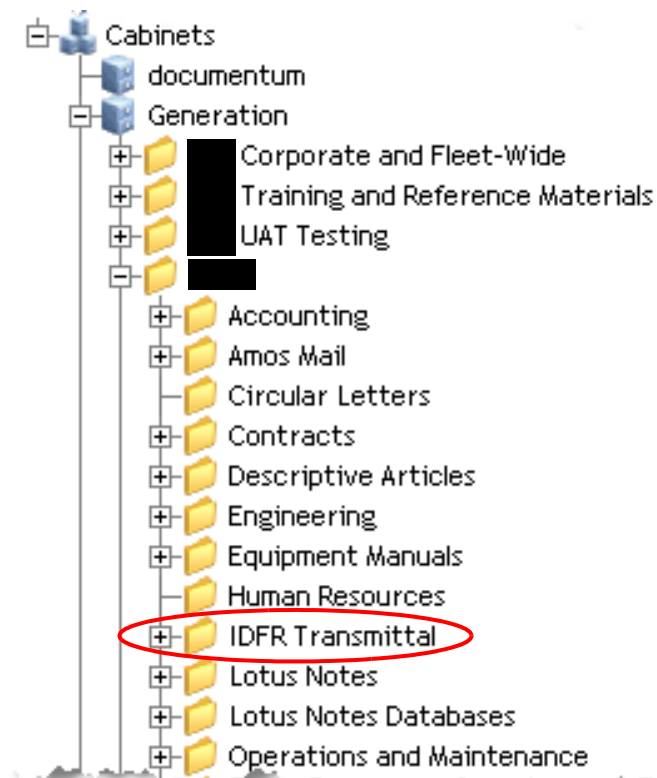
Items per page: 100

☐		Name	Version	Size	Format	Modified
☐		[REDACTED]-DMS-000237	1.0,CURRENT	1 KB		12/14/07 3:05 PM
☐		[REDACTED]-DMS-000241	1.0,CURRENT	1 KB		12/20/07 11:53 AM
☐		[REDACTED]-DMS-000242	1.0,CURRENT,WIP	129 KB	XML Document	12/21/07 9:55 AM



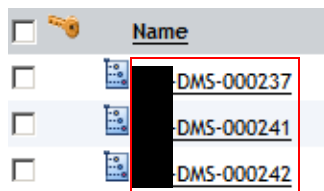
Note

To locate an IDFR transmittal in the Documentum folder structure, click the name of the AEP Plant/Location and open the IDFR Transmittal folder.

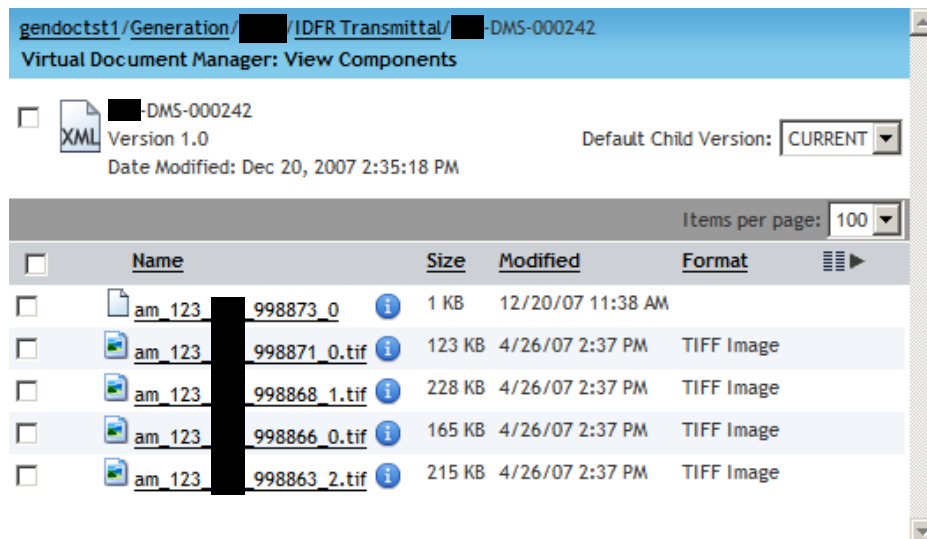


Also, you can use Documentum's Advanced Search feature to locate the IDFR Transmittal. For more information on searching for IDFR transmittals, refer to ["Locating an IDFR Transmittal" \(2-2\)](#).

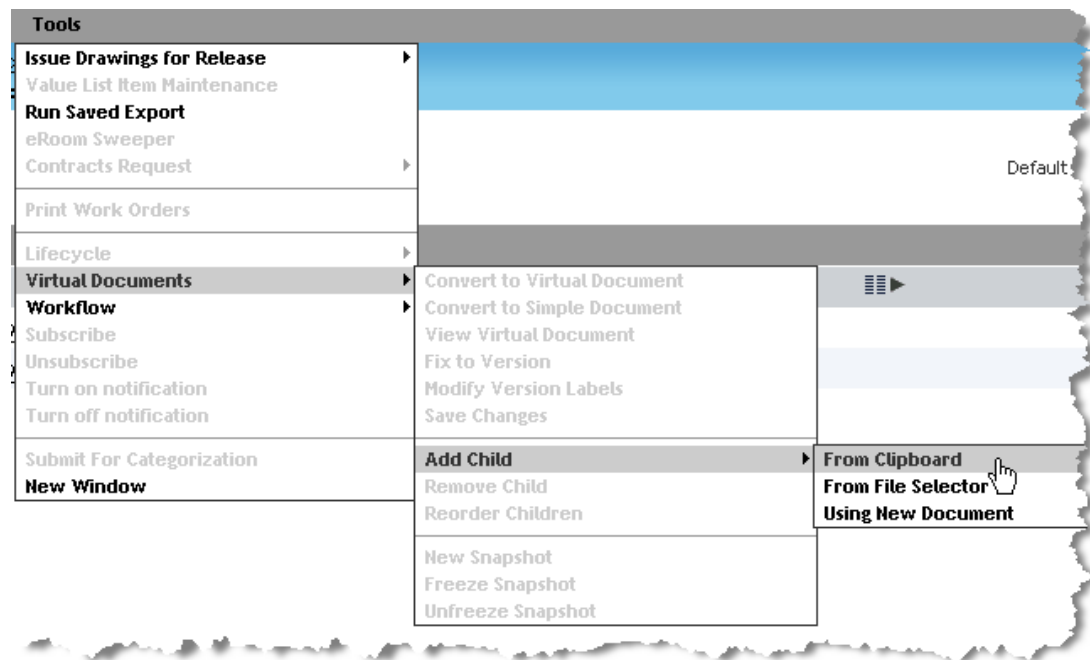
- Click directly on the draft IDFR Transmittal name to open it.



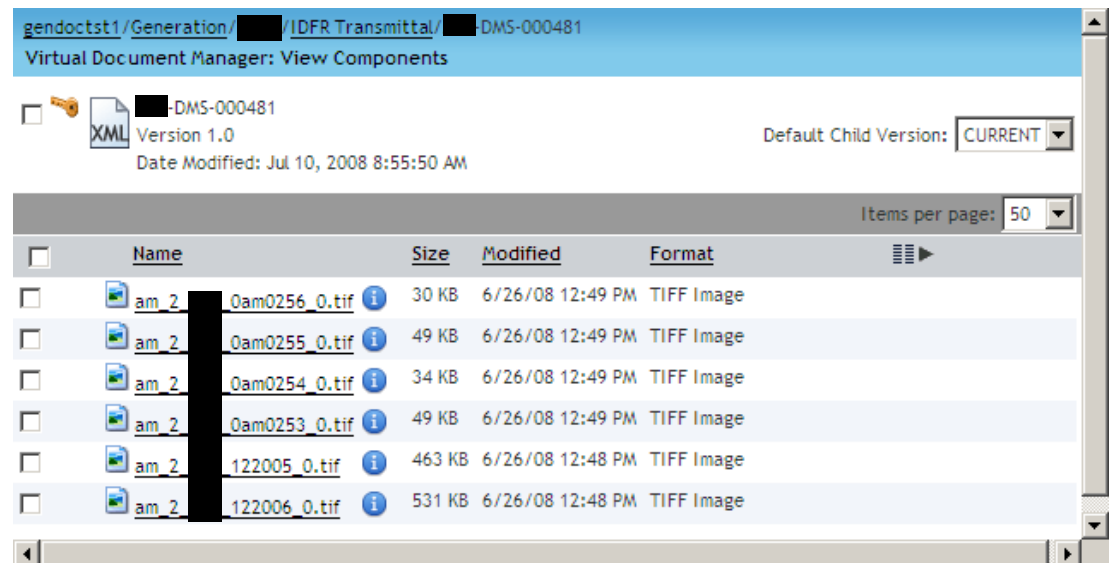
Result: The [Virtual Document Manager](#) page appears:



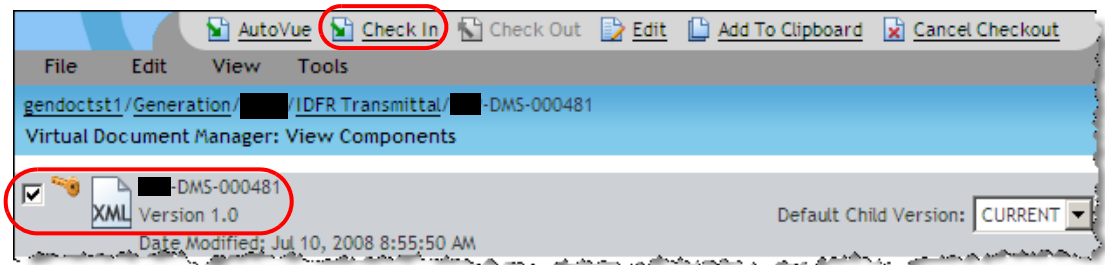
- Click **Tools > Virtual Documents > Add Child > From Clipboard**.



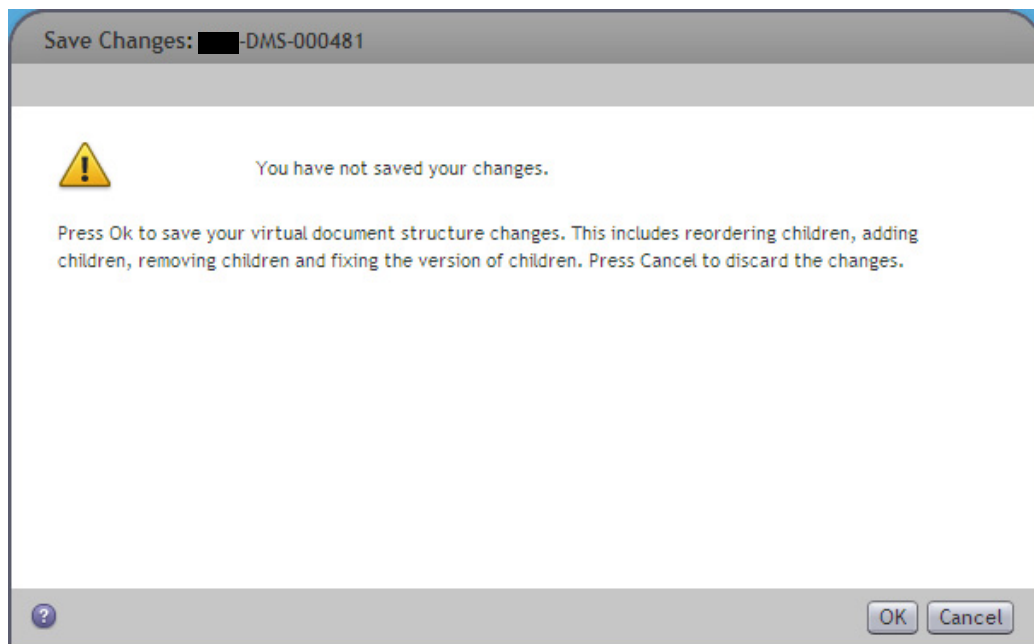
Result: Documentum automatically checks out the draft IDFR transmittal and the documents are added.



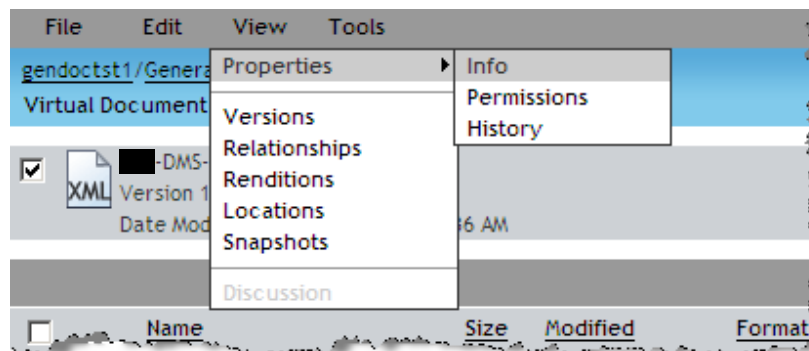
7. (Optional) If you add a child document in error, click the check box next to the desired child document and select **Tools > Virtual Documents > Remove Child**.
8. After adding (or removing) the child documents, click the check box next to the parent virtual document and click **Check In**.



Result: A save changes page appears:



9. Click **OK**.
10. Click the check box next to the IDFR Transmittal and select View > Properties > Info.



Result: The draft IDFR transmittal opens.

Issue Drawing for Release : Info

Info Distribution Drawing Summary History

XML DMS-000481
Type: aep_idfr
Format: xml

Name: DMS-000481

AEP Order Number: DMS-000481

AEP Plant/Location:

Version Label: Edit 1.0, CURRENT, DRAFT

Owner Name: Edit Brian R Bolden

Submit Save As Draft Cancel

11. Verify that the information in the **Distribution** tab is correct.



Note

If you added new drawings, the distribution list will update accordingly to include any recipients associated with the added drawings.

12. (Optional) If you are missing a recipient(s), add them on an Ad Hoc basis using the procedure in [Step 13 \(1-11\)](#) through [Step 15 \(1-11\)](#).
13. Click on the **Drawing** tab.
14. Enter the **New Revision**, **New Revision Date**, and **Reference Only** values.

Issue Drawing for Release : Drawing

Info Distribution Drawing Summary History

XML DMS-000481
Type: idfr
Format: xml

Drawings

Total Drawings : 6

Document Number	Title	Drawing Type	Size	Discipline	Unit	Current Revision	Revision Date	New Revision <u>Up Rev</u>	New Revision Date (mm/dd/yyyy)	Reference Only
☐ 122005	KEY DIAGRAM UNIT 2 480V MCC	Elementary Diagrams	G	Electrical Engineering	2	0	12/28/2007	☐		☐
☐ 122006	KEY DIAGRAM UNIT 2 480V MCC	Electrical Miscellaneous	G	Electrical Engineering	2	0	12/28/2007	☐		☐
☐ 0AM0254	CEMS MONITORING SYSTEM CALI	Cable Schematic Diagrams	C	Electrical Engineering	2	0	08/03/2007	☐ 1	07/10/2008	☐
☐ 0AM0253	CEMS MONITORING SYSTEM INLE	Cable Schematic Diagrams	C	Electrical Engineering	2	0	08/03/2007	☐ 1	07/10/2008	☐
☐ 0AM0255	CEMS MONITORING SYSTEM TUBI	Cable Schematic Diagrams	C	Electrical Engineering	2	0	08/03/2007	☐ 1	07/10/2008	☐
☐ 0AM0256	CEMS MONITORING SYSTEM DCS	Cable Schematic Diagrams	C	Electrical Engineering	2	0	08/03/2007	☐ 1	07/10/2008	☐

Submit Save As Draft Cancel



Reference: Refer to section [Step 17 \(1-13\)](#) through [Step 20 \(1-14\)](#) for more information on the **New Revision**, **New Revision Date**, and **Reference Only** fields.



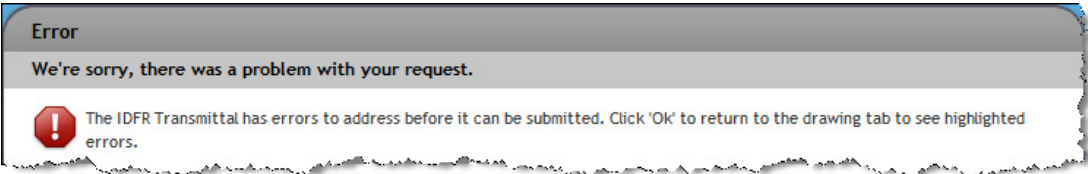
Note

It is recommended that you verify that the Project ID is valid on Reference Only documents in the IDFR. Make this verification until the legacy data clean up effort to correct the invalid Project IDs is complete.

15. Click **Apply All**.

16. Click **Submit**.

Result: The transmittal either submits successfully to Print Services for processing, or the following screen appears if there were IDFR processing errors.



If...	Then...
You received IDFR processing errors.	Proceed to section " Validation of _Engineering Objects " (1-25) to correct the errors.
You received no IDFR processing errors.	The transmittal submits successfully to Print Services for processing.



Validation of [REDACTED] Engineering Objects

Purpose

Documentum does not allow duplicate [REDACTED] Engineering objects. Engineering objects are validated against existing objects in Documentum or in the IDFR transmittal.

If the key properties for a drawing in your IDFR transmittal match the key properties of an existing file, Documentum prompts you to change the information or remove the object from the transmittal. Duplicate drawings are not issued for release.

Documentum validates objects by checking the following properties:

- Plant
- Unit
- Company
- Document Number
- Revision
- Revision Date.



Correcting Validation Errors

Complete the following optional steps to resolve errors that were encountered during the IDFR Process:

1. On the **Error** page, click **OK**.

Result: The **Issue Drawing for Release: Drawing** page appears. Drawings with errors are highlighted:

Document Number	Title	Drawing Type	Size	Discipline	Unit	Current Revision	Revision Date	New Revision Up Rev	New Revision Date
998863	COAL HANDLING RECLAIM EAST	Elementary Diagrams	G	Electrical Engineering	123	2	11/01/2006	3	12/01/2006
998866	COAL HANDLING RECLAIM WEST	Elementary Diagrams	G	Electrical Engineering	123	0	08/16/2006		
998868	COAL HANDLING RECLAIM WEST	Elementary Diagrams	G	Electrical Engineering	123	1	09/08/2006	2	12/01/2006
998871	COAL HANDLING SYSTEM STATIO	Elementary Diagrams	G	Electrical Engineering	123	0	09/08/2006	1	12/01/2006
998873	COAL HANDLING SYSTEM	Elementary Diagrams	B	Electrical Engineering	123	0	12/20/2007	0	12/01/2006
3104	FEEDS FOR UNIT 1, 2, & 3 EQUIP	Auxiliary One Line Diagram	G	Electrical Engineering	123	9	11/18/2005	10	12/01/2006

A document with the same Plant, Unit, Company, and Document Number exists in Documentum that has a later revision date. This document is not issued.

Submit Save As Draft Cancel

2. Resolve the error by performing one of the following tasks:
 - Remove the drawing from the Drawing List. Refer to [Step 7 \(1-21\)](#) for more information on this.
 - Correct the New Revision or New Revision Date as applicable and click **Apply**.
 - Select the **Reference Only** check box and click **Apply**.
3. Once the error(s) is resolved, click **Submit**.

Result: The IDFR Transmittal is successfully submitted.

Verifying the Stages of IDFR Transmittal

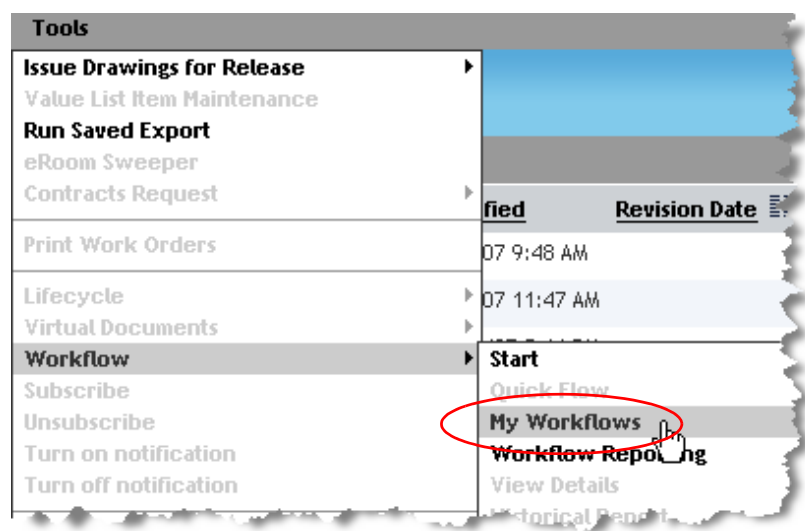
Purpose

Use this procedure to verify that your IDFR Transmittal has been submitted to [REDACTED] Print Services for processing.

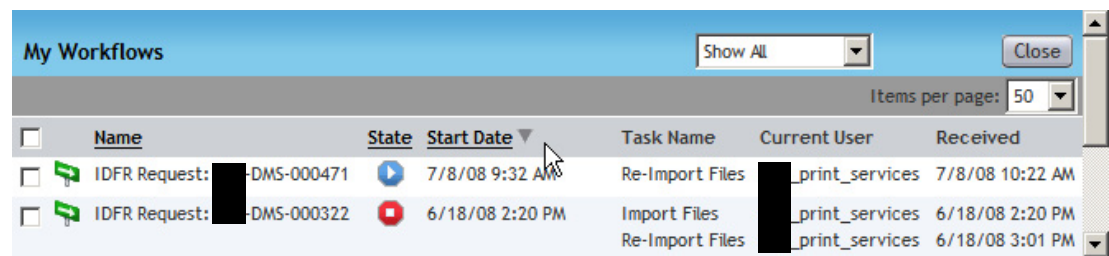
Instructions

To verify the stages of the IDFR Transmittal in the [Workflow](#):

1. Click on **Tools > Workflow > My Workflows**.



Result: The **My Workflows** list appears:



2. Click the check box next to the IDFR transmittal for which you would like to see progress.

3. Click **Tools > Workflow > View Details > Summary**.

Result: The **Workflow Reporting: Details View: Summary** page appears.

Task Name	Status	Action	Performer(s)	Comment(s)
Submit Transmittal	Complete		documentum	
Import Files	Complete	Forward	[redacted]	
Upload Files	Complete		documentum	The file names required for upload are not available in the shared
Check Upload Error	Complete		documentum	
Re-Import Files	Complete	Forward	[redacted]	
Upload Files	Complete		documentum	The file names required for upload are not available in the shared
Check Upload Error	Complete		documentum	
Re-Import Files	Pending		[redacted].print_services	
Email Transmittal	Future		Supervisor	
Queue WF Finish	Future		Supervisor	
Lifecycle Promote	Future		Repository Owner	
Complete IDFR	Future		Repository Owner	



Note

In the workflow summary above, you are only responsible for the **Submit Transmittal** task.



Note

The only way to recall an IDFR after it is submitted is to terminate the workflow by clicking **Terminate Workflow** button.

When you terminate an IDFR workflow, you have to recreate it from scratch to submit it. Make sure that you contact Documentum Support prior to executing an IDFR termination.

Viewing and Printing Your IDFR Transmittal

Purpose

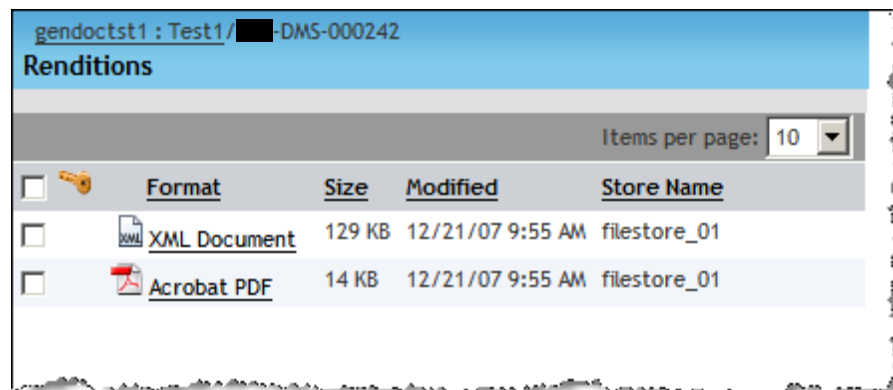
Once you have finished submitting an IDFR transmittal to Franklin Imaging, you should print a hard copy of the IDFR transmittal

Instructions

Perform the following steps to access this package informations:

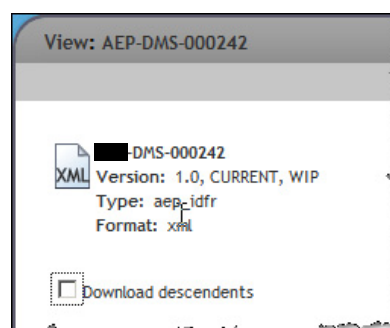
1. Locate the **Order Number** you noted in [Step 4 \(1-8\)](#).
2. Open your **My Files** folder and find the **Order Number** that matches the Virtual Document in the IDFR Transmittal you would like to view or print.
3. Click the check box next to your IDFR Transmittal.
4. Click **View > Renditions** from the toolbar.

Result: The [Rendition](#) page similar to the one below opens:



5. Click the file labeled **Acrobat PDF**.

Result: The **View PDF** page appears.



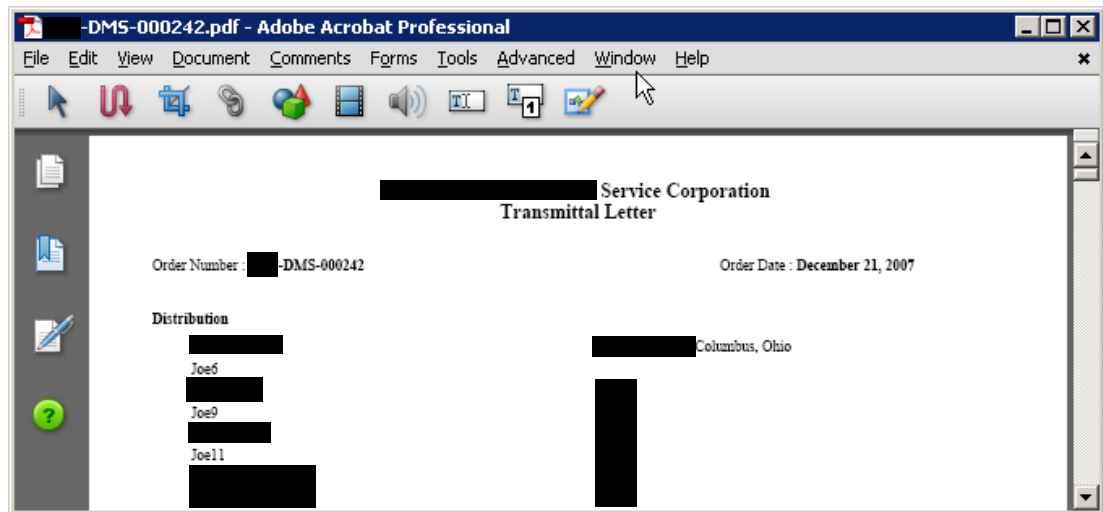


Note

It is not necessary to select **Download descendants**. If you check **Download descendants**, Documentum opens each drawing associated with the transmittal.

6. Click **OK**.

Result: The IDFR transmittal opens in Adobe Acrobat.



The IDFR transmittal consists of the following documents for your records:

- Transmittal Letter
- Plant Drawing Report
- Plant Distribution List
- Reproduction Requisition
- Plant Summary Report

All of these documents are generated and tied together in PDF format every time you save a draft IDFR Transmittal or submit an IDFR Transmittal.

7. Select **File > Print** to print the IDFR Transmittal.



2 Verifying the IDFR Transmittal

Overview

Purpose

Once you have submitted your IDFR request and [REDACTED] Imaging has scanned and placed the documents into Documentum, it is your responsibility to verify that your IDFR has been completed fully and correctly. This lesson explains how to do that.

Objectives

After this lesson, you will be able to:

- Search for an IDFR Transmittal and its associated documents.
- Verify that the associated documents have up-revved.
- Verify that the [REDACTED] **Project ID**, [REDACTED] **Work Order Number**, and [REDACTED] **IDFR Transmittal Number** attributes updated correctly.

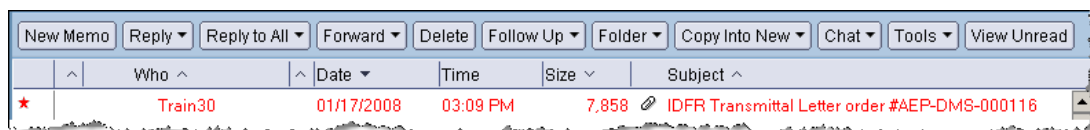
Locating an IDFR Transmittal

Purpose

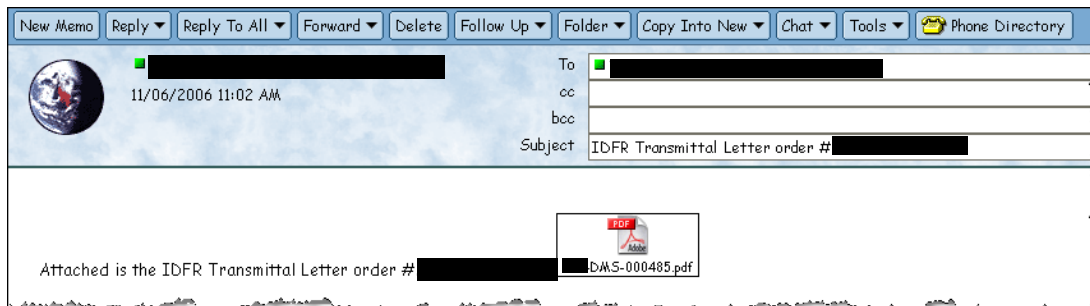
This section explains how you can verify that the documents contained in the IDFR Transmittal have been correctly up-revved. You can perform this verification after Print Services has completed their process in the IDFR workflow.

Before you begin

You will receive an e-mail notification similar to the following one once your IDFR transmittal is complete.



***Hint:** This e-mail is sent to everyone on the IDFR Transmittal Distribution List.*



If you do not have a copy of your transmittal letter, open the PDF attached to the e-mail and print the IDFR Transmittal Letter.



Important

After print services completes the processing the IDFR Transmittal, the child documents are released from the parent virtual document. This is an update from previous IDFR functionality, where the parent/child relationships remained intact after Print Services completed their process.

Instructions

1. Log into Documentum.
2. Click **Advanced...** to open Documentum's Advanced Search page.

Result: The Advanced Search page appears:

Advanced Search:

General My Saved Searches All Saved Searches

Contains: [Search Tips](#)

Locations: ☒ gendoctst1 [Edit](#)
☐ Current location only: gendoctst1:/Generation/Amos/IDFR Transmittal

Object Type:

Properties: [Remove](#)
[Add another property](#)

Date:
☒ Anytime
☐ From
☐ To

Size:

Additional: ☐ Find hidden objects
☐ Find all versions

3. In the **Object Type** field, select **Engineering**.
4. In the first **Properties** field, select **IDFR Transmittal Number**.
5. In the second **Properties** field, select the equals sign (=).
6. In the third **Properties** field, enter the the IDFR Transmittals order number (for example, **DMS-000481**).

Result: The Advanced Search page should look similar to the following screen shot:

Advanced Search:

General My Saved Searches All Saved Searches

Contains: [Search Tips](#)

Locations: ☒ gendoctst1 [Edit](#)
☐ Current location only: gendoctst1:/Generation/[redacted]/IDFR Transmittal

Object Type: [redacted] Engineering (aep_engineering)

Properties: Name = [redacted]-DMS-000481 [Remove](#)
[Add another property](#)

Date: Accessed
☒ Anytime
☐ From To

Size: Any Size

Additional: ☐ Find hidden objects
☐ Find all versions

[?](#) Search Clear Cancel

7. Click **Search**.

Result: The Search Results page appears:

Search: Go Advanced... Search Tips Preferences Logout Help

AutoVue Check In Check Out Edit Add To Clipboard Cancel Checkout

Display CURRENT Versions [Save]

AEP-DMS-000481

File Edit View Tools

Search Results
Results in gendoctst1

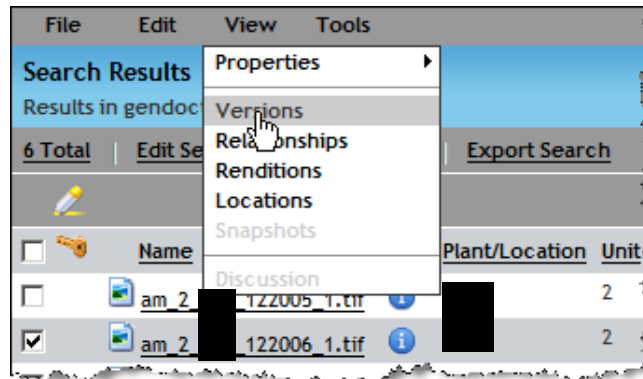
6 Total Edit Search Save Search Export Search

Name	Plant/Location	Unit	Document Number	Revision	Revision Date
am_2 122005_1.tif	Amos	2	122005	1	7/11/08 12:00 AM
am_2 122006_1.tif	Amos	2	122006	1	7/11/08 12:00 AM
am_2 0am0254_1.tif	Amos	2	0AM0254	1	7/10/08 12:00 AM
am_2 0am0253_1.tif	Amos	2	0AM0253	1	7/10/08 12:00 AM
am_2 0am0255_1.tif	Amos	2	0AM0255	1	7/10/08 12:00 AM
am_2 0am0256_1.tif	Amos	2	0AM0256	1	7/10/08 12:00 AM

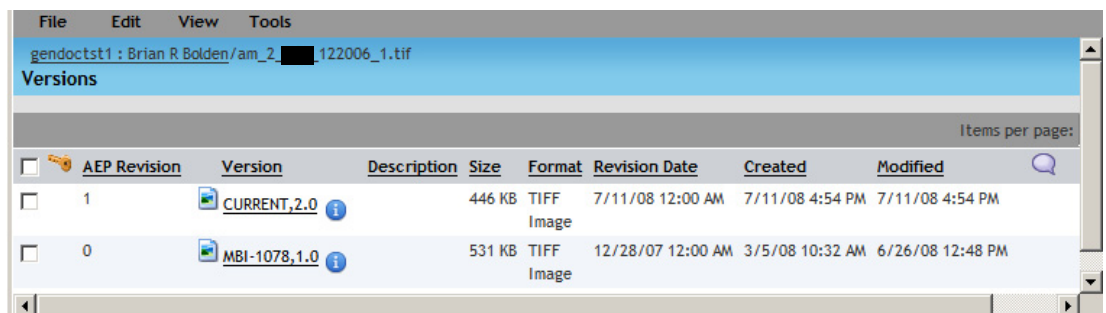
No Messages View Messages Job Status

This search bring up all documents associated with the IDFR Transmittal (the order number of which you specify in the Advanced Search parameters).

8. To verify that the IDFR transmittal has up-revved, click the check box next to the document and select **View > Versions**.



Result: The **Versions** page appears for the file you selected.



Verify that the drawing marked **Current** is correct and that it has up-revved.



Note

On up-revved documents, the **Project ID**, **Work Order Number**, and **IDFR Transmittal Number** are updated, which replaces these attributes in the previous versions of the documents).

9. To verify that the **Project ID**, **Work Order Number**, and **IDFR Transmittal Number** attributes updated on an up-revved drawing, click the **Properties**  icon next to the desired document.

Result: The Properties: Info page appears.

Properties: Info

Generation Engineering **Info** Permissions History

am_2_122006_1.tif
Type: engineering
Format: tiff

Company: [dropdown] *

Plant/Location: [dropdown] *

Unit: 2 *

Document Number: 122006 *

Title: KEY DIAGRAM UNIT 2 480V MCC 42G3 2-EL-MCC-42 *

Revision Number: 1 *

Revision Date (MM/DD/YYYY): Jul 11, 2008, 0, 0, 0 *

Project Type: FGD

Project ID: Edit WSN100594

Work Order: Edit 0016396701

Work Breakdown Structure: A6109

OK Cancel

10. From the **Generation** tab, verify that the **Project ID** and **Work Order Number** attributes are correct.

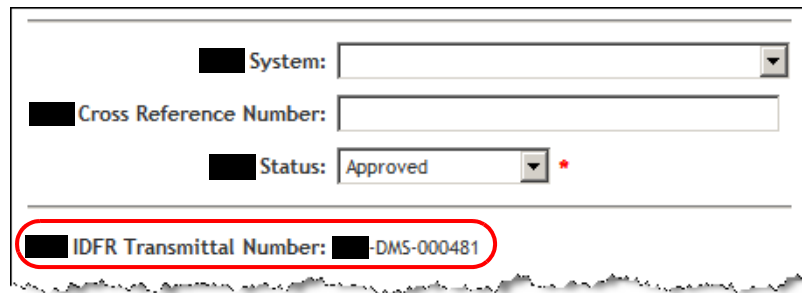
Project Type: FGD

Project ID: Edit WSN100594

Work Order: Edit 0016396701

Work Breakdown Structure: A6109

11. From the **Engineering** tab, verify that the [REDACTED] **IDFR Transmittal Number** attribute is correct.



System: [REDACTED]
Cross Reference Number: [REDACTED]
Status: Approved
IDFR Transmittal Number: [REDACTED] -DMS-000481



Note

For **Reference Only** documents, the [REDACTED] **Project ID**, [REDACTED] **Work Order Number**, and [REDACTED] **IDFR Transmittal Number** are appended with the values from the IDFR Transmittal.





Glossary

A

Adhoc Distribution List

The Adhoc Distribution List function allows you to add new users to an existing distribution list.

Reproduction Instructions

The **Reproduction Instructions** field allows you to give specific printing instructions to **Imaging**.

Transmittal Description

The **Transmittal Description** field allows you to relay specific directions to **Imaging**.

C

Clipboard

The Clipboard is used to add documents to a draft IDFR Transmittal.

Contentless Documents

Contentless documents (also called profiles) are used as "place holders" for documents that are being issued into Documentum for the first time.

D

Distribution List

The distribution list includes all recipients of drawings in the IDFR Transmittal. It also includes drawing distribution instructions.

Documentum

Documentum is the document repository that **Imaging** has selected.

Draft IDFR Transmittal

The Draft IDFR Transmittal is where you can edit the properties for the IDFR Transmittal before submitting it to **Imaging**.

Drawing List

The Drawing List includes all drawings in the IDFR Transmittal. It allows you to up-rev drawings or mark drawings for Reference Only.

F

Imaging (Print Services)

Imaging reproduces all drawings in the IDFR Transmittal.

██████ Imaging Transmittal Package

The ██████ Imaging Transmittal package is the hard copy of the Transmittal and accompanying documents for processing an IDFR request.

I

IDFR

Issue Drawing for Release. This is the process by which drawings are up-revved and issued in Documentum.

IDFR Transmittal

The IDFR Transmittal is the document that provides all information related to the drawings being issued and where they are to be distributed.

M

My Files

The My Files folder includes links to any documents you have worked on in the past thirty days.

P

Plant Distribution List

The Plant Distribution List includes the names of everyone who is supposed to receive drawings from the IDFR transmittal. It also includes distribution instructions for each user.

Plant Drawing Report

The Plant Drawing Report includes a list of the drawings to be printed.

Plant Summary Report

The Plant Summary Report lists the total number of each type of drawing to print. It also includes special instructions for ██████ Printing.

Profiles

See "Contentless Documents."

R

Recipient Print Specification

A recipient print specification defines all the attributes for a user who is to receive updated or new prints.

Rendition

A rendition is a PDF copy of a document (or virtual document).

Reproduction Requisition

The Reproduction Requisition includes reproduction instructions for all drawings in the IDFR Transmittal.

T**Transmittal Letter**

The Transmittal Letter includes the Order Number, Order Date, and the Distribution List for the IDFR Transmittal.

U**Upload Documents**

This is where you will find the documents you scanned and placed on your hard drive.

V**Virtual Document Manager**

The Virtual Document Manager lets you add documents to a draft IDFR transmittal.

Virtual Documents

Virtual documents are a combination of documents paired together in a "parent/child" relationship. If you view a book as a virtual document. The book is the parent and each section in the book is a child (descendent).

W**Workflow**

The workflow pushes your IDFR Transmittal through a set of "Tasks" that need to finish before the transmittal is complete.



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