



Content Management

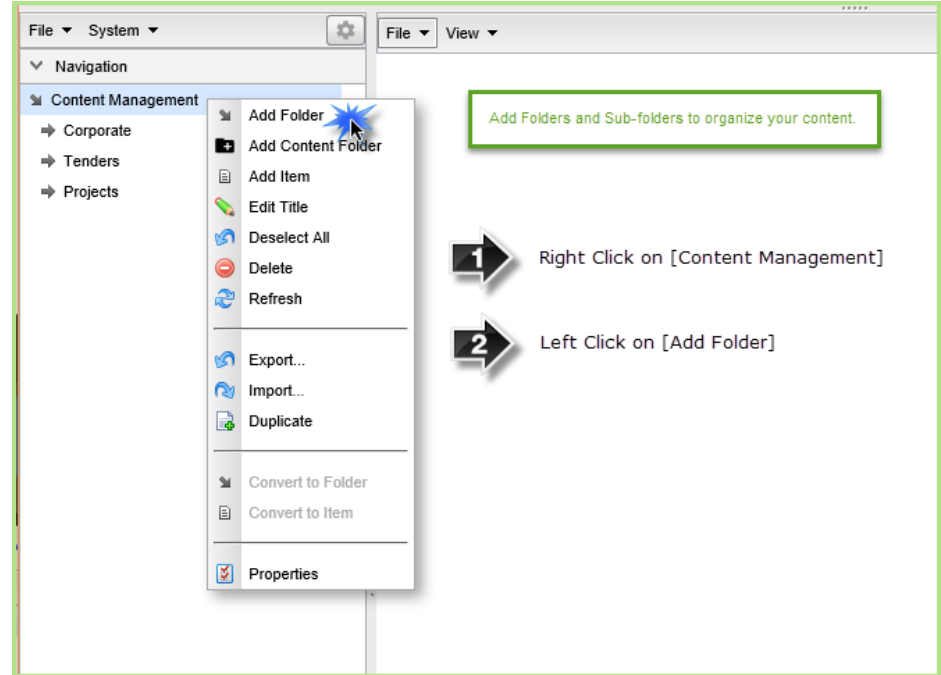


Launching Content Management

The screenshot displays the ECMS TRAINING application interface. At the top, a navigation bar includes the following tabs: Eq Maint, ECM (highlighted in yellow), Forms, G/L, H/R, H/R-E, Imports, Inquiry, J/C, and Ord Proc. A dropdown menu is open under the ECM tab, listing the following options: Content Management (with a star icon), CM Workflow, Imaging, and Workflow. A mouse cursor is positioned over the 'Content Management' option. In the bottom right corner, a user profile overlay is visible, showing the name 'Jon Bruce', a profile picture, and the text '01/000 - Your Construction Company'. Below this, a row of icons (a folder, a star, a gear, a question mark, and a close button) is shown. A tooltip is displayed over the folder icon, containing the text 'CM - Content Management'. The background of the interface features a large, stylized blue and white graphic.

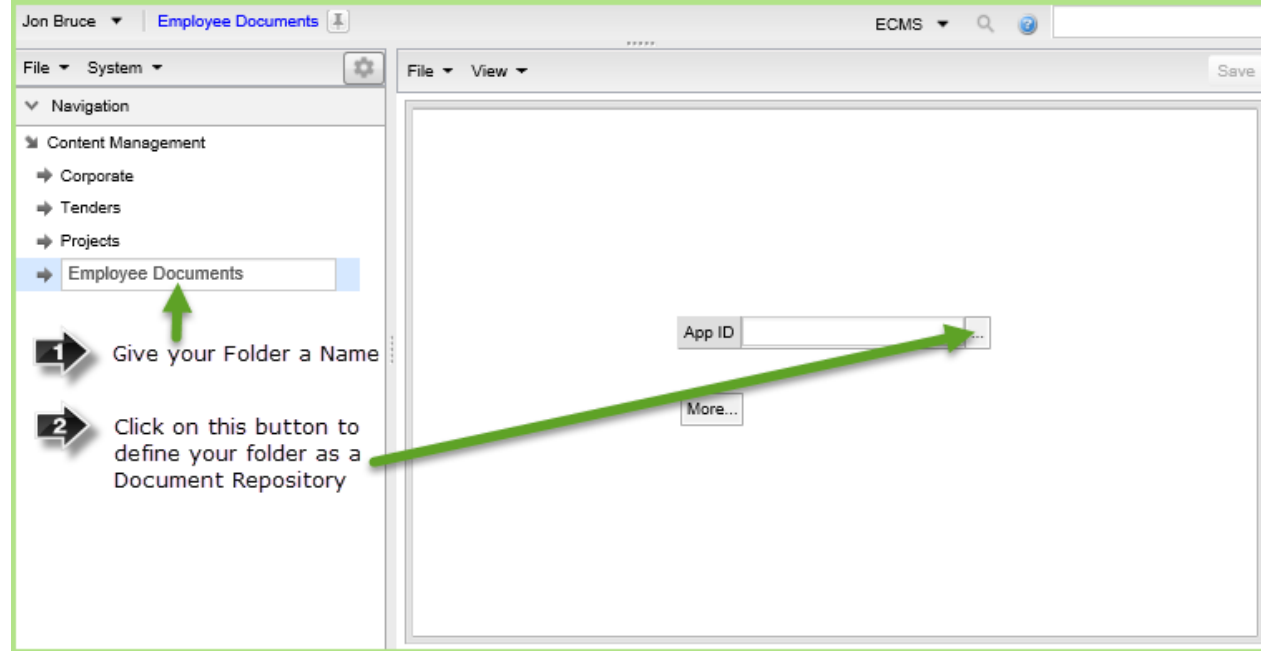
Add Folders, Subfolders & Items

- Folders & Subfolders can be menu items also
- Use Folders & Subfolders to organize your content



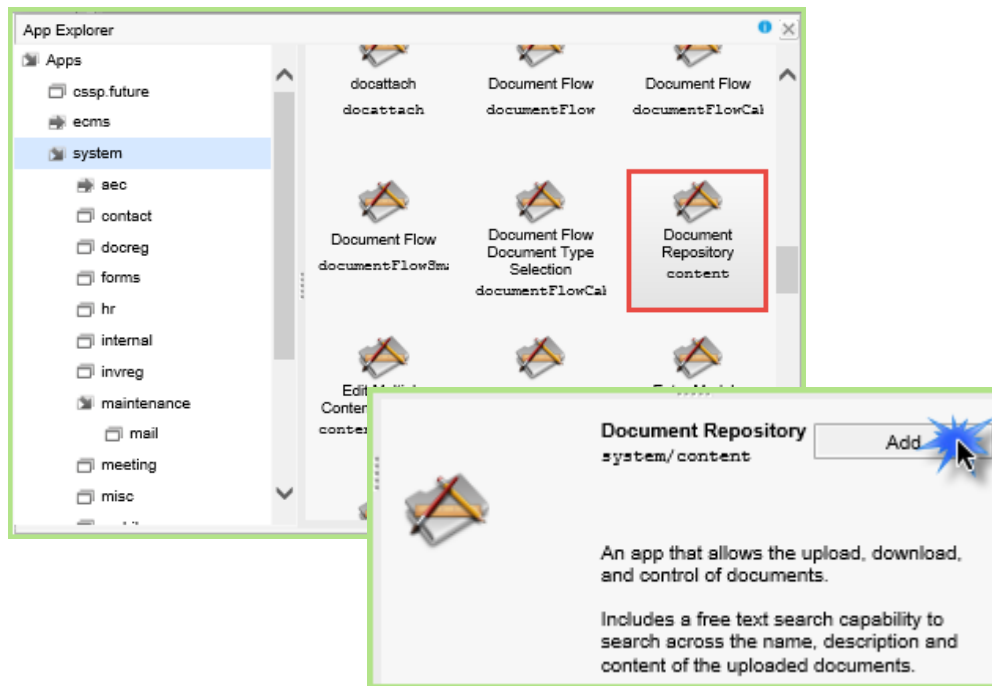
Folder Name & Type

- Misc Content Folder
- Not used with the Red Push Pins

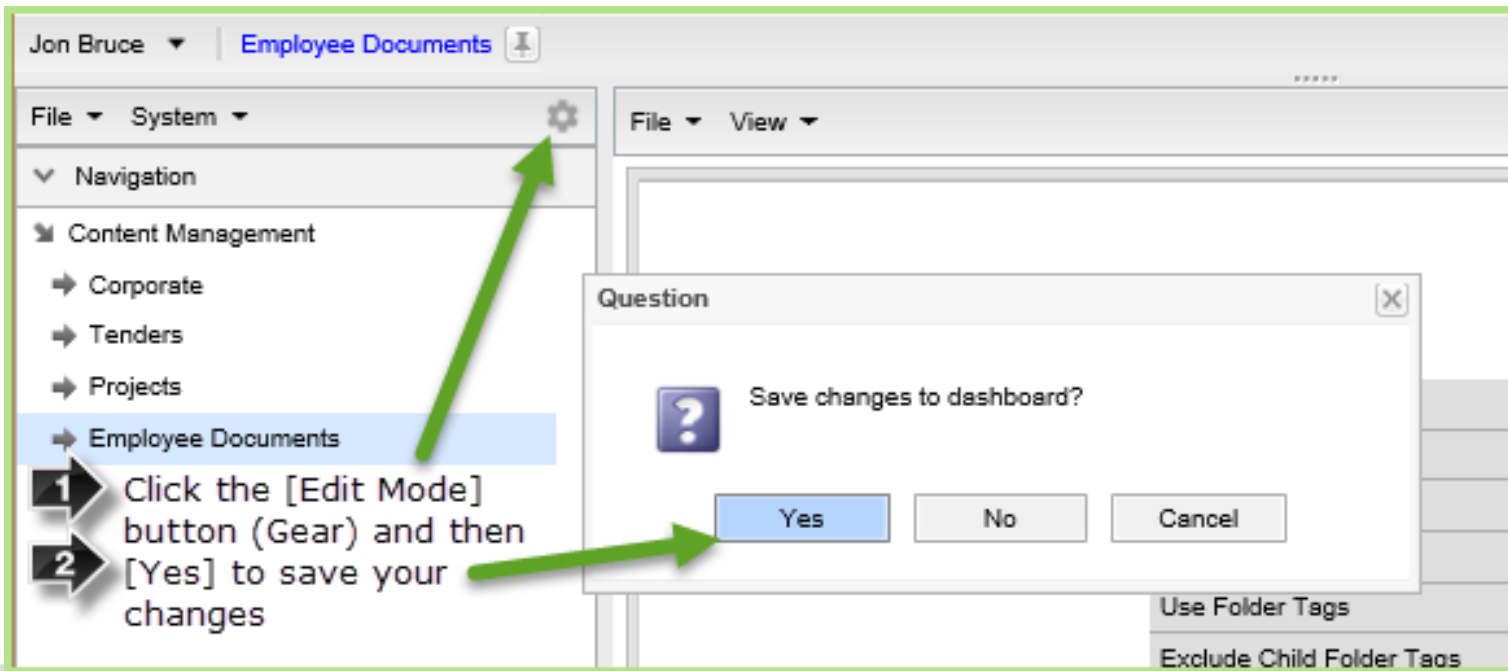


Document Repository

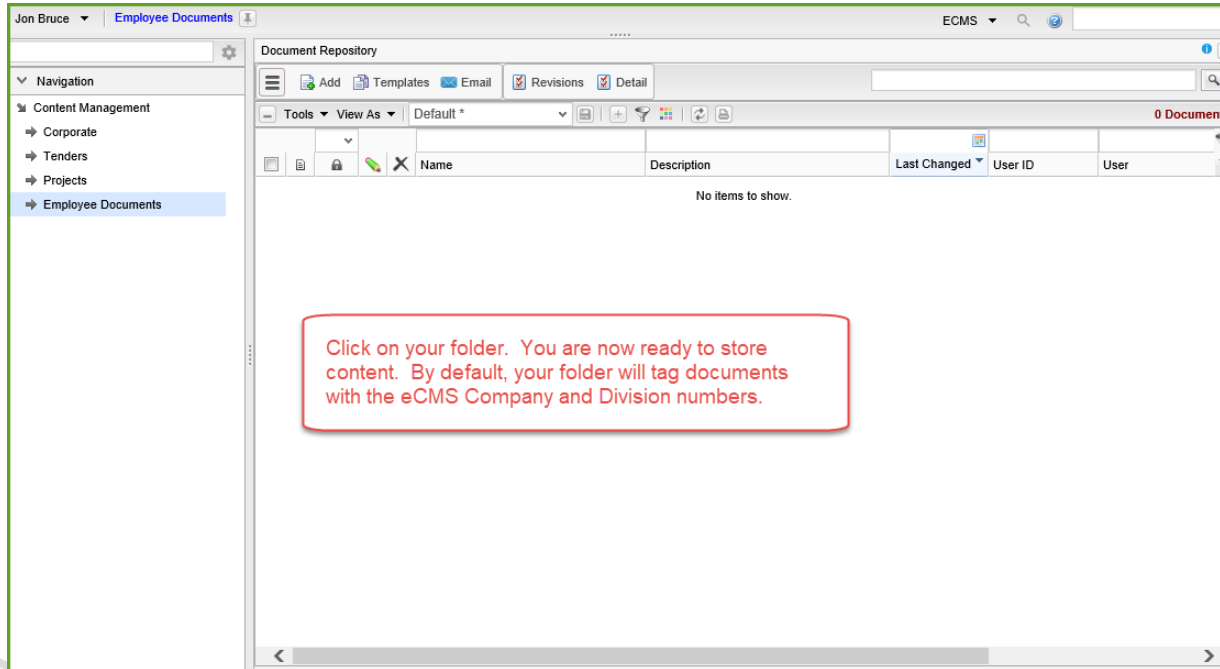
- Select [System] in the left panel
- Scroll to and Click on [Document Repository] in the right panel
- When the Document Repository window appears click [Add]



Saving Changes



Simple Document Repository



Repository Linked to Master File Push Pin

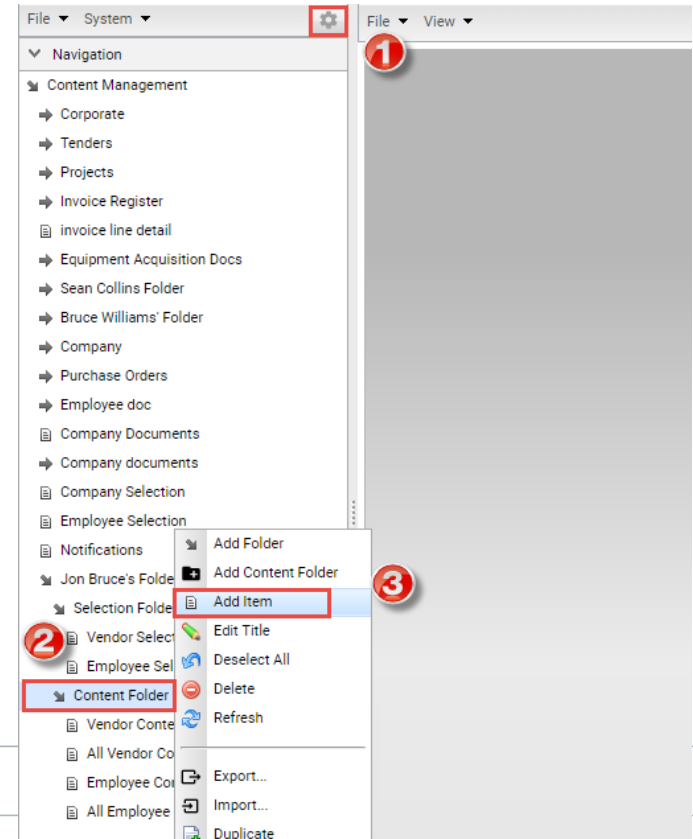
- System will create Image Categories with the Name XCIPIO as part of their name
- Requires a [Selection] Menu Item and a [Content] menu item.
- Specific parameters are required

XCIPIO Categories Created (for Red Push Pins)

- AP Invoices
 - Non-PO Invoices
 - Subcontract Invoices
 - PO Supported Invoices (No Receiving)
- AP Vendor Master
- AR Customer Master
- AR Invoice
- Equipment Master
- Employee Master
- Job Description

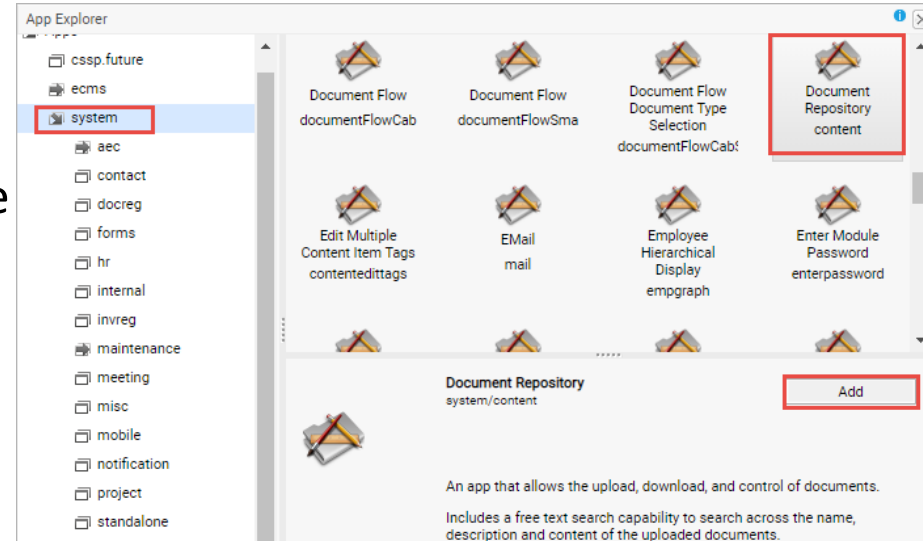
Content Item Creation

- Step 1 – Click the Gear to go into “Edit Mode”
- Step 2 – Right click on the Folder where you want your Content Item
- Step 3 – Select [Add Item] from the pop up menu
- Step 4 – Name your New Item (i.e. “Equipment”)



Content Item Creation

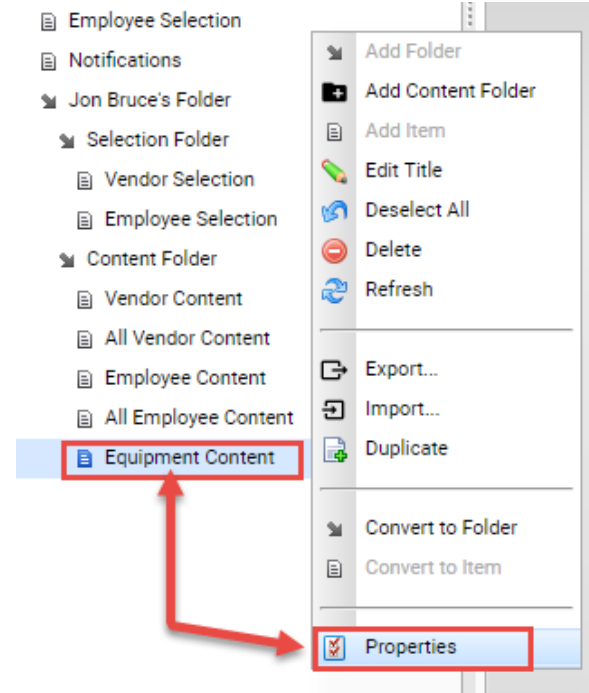
- Click on your newly created and named Content Item
- Click the “Select App” button to the right of the App ID
- From the [system] menu item, locate and click on the [Document Repository – content] option
- Then Click the [Add] button



Content Item Properties

- Right Click on your New Content Folder and select [Properties]
- The Menu Properties screen should appear that looks like this:

The screenshot shows a dialog box titled "Menu Properties for Equipment Content". It has four tabs: "Tags", "Security", "Settings", and "Folder Visibility Tags". The "Tags" tab is active, showing two sections: "Inherited Tags" and "Composite Folder Tags". Both sections contain a table with columns "Name", "Value", and "Active". Below these sections is a "This Folder Tags" section with input fields for "Name" and "Value", an "Add" button, and another table with columns "Name", "Value", and "Or". All tables are currently empty, displaying "No items to show."



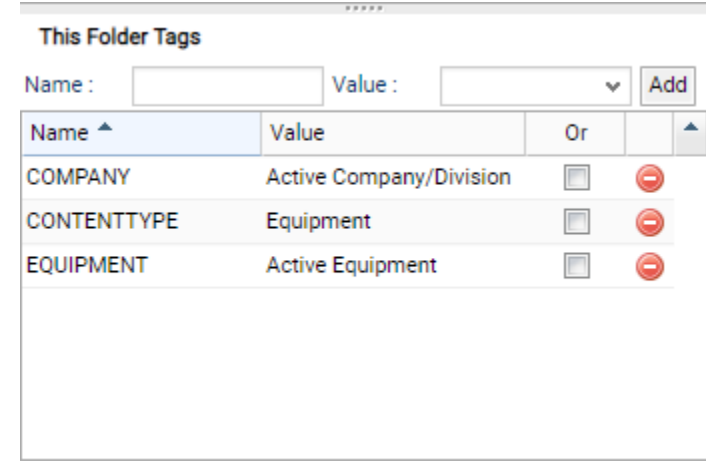
Content Item Properties...continued

- In the “This Folder Tags” section you will need to create some tags that will be associated with content dropped into this content item
- In the [Name] field type in COMPANY
- Next, click the drop down from the [Value:] field and select [Active Company/Division]
- Then click [Add]

The screenshot shows a web interface titled "This Folder Tags". At the top, there are two input fields: "Name :" and "Value :". The "Name :" field contains the text "COMPANY". The "Value :" field has a dropdown arrow and an "Add" button. Below these fields is a table with two columns: "Name" and "Value". The table is currently empty, displaying "No items to show.". To the right of the table, a dropdown menu is open, listing various tag options. The option "Active Company/Division" is highlighted with a red box. Other options in the list include "Active Project", "Active Project Name", "Active Customer", "Active Customer Name", "Active Employee", "Active Employee Name", "Active Vendor", "Active Vendor Name", "Active Subcontract", "Active Subcontract Description", "Active Equipment", "Active Equipment Description", "Active Purchase Order", "Active AP Invoice", "Active AR Invoice", "Active Company/Division Name", and "Active eCMS Company Number".

Content Item Properties...continued

- Next add a user defined Tag which will be used later. I called mine CONTENTTYPE and gave it a user defined value of “Equipment”
- Lastly, Type in the [Name] field a description of the Item you are attaching content to in this particular folder and then from the drop down in the [Value] field select the “Active XXXXXXXX” where XXXXXXXX is, again, the item you are attaching things to. Mine is Equipment. (Then close the Window)



This Folder Tags

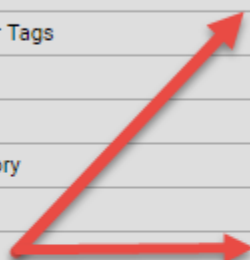
Name : Value : Add

Name ^	Value	Or	
COMPANY	Active Company/Division	<input type="checkbox"/>	-
CONTENTTYPE	Equipment	<input type="checkbox"/>	-
EQUIPMENT	Active Equipment	<input type="checkbox"/>	-

Content Item Parameters

- Make sure you check the [Use Folder Tags] Checkbox
- In the [Tag Columns] field, enter the name of any Tags you want as separate columns in your Content View. You will see your Tags once you save and exit edit mode
- Separate multiple tags with a comma

App ID	system/content	...
Title	Document Repository	
Minimal UI	<input type="checkbox"/>	...
Suppress Drills	<input type="checkbox"/>	...
Use Folder Tags	<input checked="" type="checkbox"/>	...
Exclude Child Folder Tags	<input type="checkbox"/>	...
Search Mode	Inactive	▼ ...
Search Expression		...
Show Revision History	<input type="checkbox"/>	...
Show Detail Panel	<input type="checkbox"/>	...
Tag Columns	EQUIPMENT	...
Workflow Type		...
Default Publish Status (D=Draft, P=Published)	P	...
Show Template Button	<input checked="" type="checkbox"/>	...
Start in Templates	<input type="checkbox"/>	...
Duplicate Handling	Mark	▼ ...
PDF Document Stamp		...
Email To		...



Content Item Parameters

- Save and exit Edit Mode
- You will see all tags together in the [Tags] Column
- Because you Entered a value in the Tag Columns field (previous slide), you will see that tag as an option by itself to select in your view.
- Change the Header as desired

Document Repository

Tools View As Equip Content

Tag:Equipment	Name	Tags	Last Chan...
600001	600001 Pic.jpg	COMPANY:1/0 CONTENTTYPE:Equipment EQUIPMENT:600001	01/28/2019 0...

To change the column header, right click on the header and select [Properties]. Override the Header in the [Title Override] field and click [Save]. May need to be an Administrator

Column Properties

Field Name: _TAG_EQUIPMENT

Title:

Title Override: Tag Equipment

Total: ☐

Save Cancel

Content Item For All Records

- The Content Item Folder you just created will display content for a specific record (Vendor, Customer, Employee, etc)
- If you would like to see specific content across all records, all equipment for example, you will need to create another Content Item Folder exactly the same way with a slight modification to the Properties as follows:

This Folder Tags

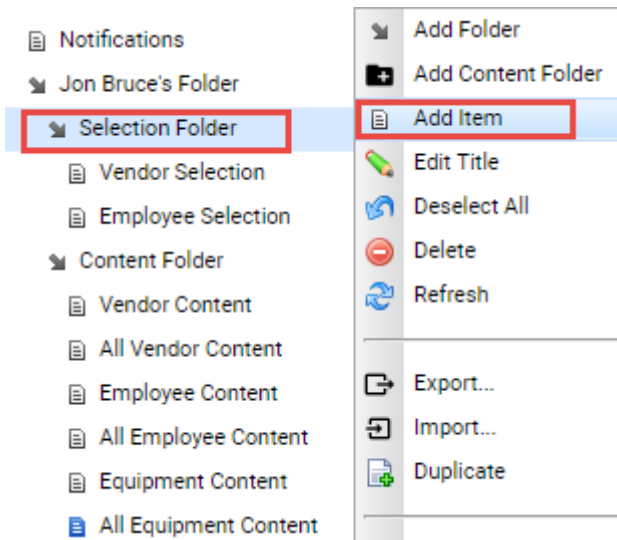
Name : Value : Add

Name ^	Value	Or	
COMPANY	Active Company/Division	<input type="checkbox"/>	<input type="button" value="-"/>
CONTENTTYPE	Equipment	<input type="checkbox"/>	<input type="button" value="-"/>

Same Properties except you will not add the last entry, "Active Equipment" in my example

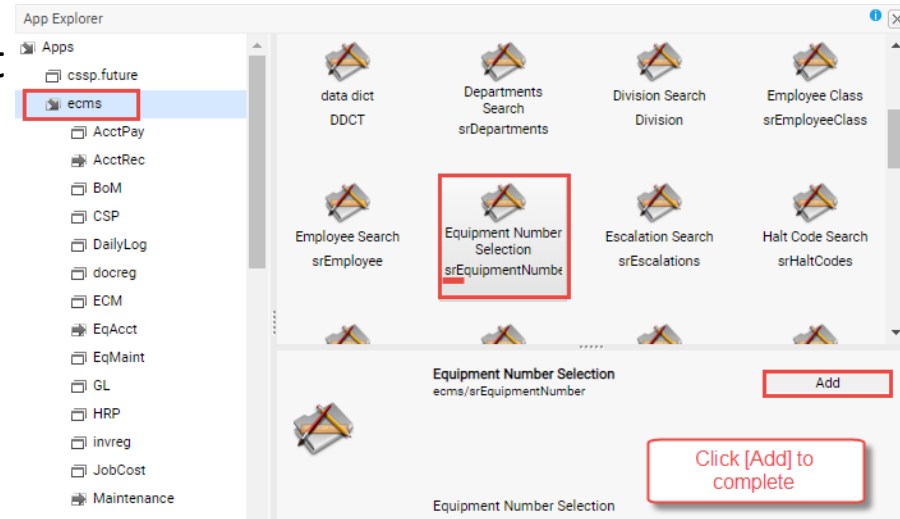
Selection Item Creation

- Same Steps as the Content Item Creation
 - Make sure you are in Edit Mode
 - Right Click on the Folder you want to create the item in
 - Click [Add Item]
 - Name your Item Folder. I named mine “Equipment Selection”
- Note that I chose to create a separate folder for my Selection Items. This is not a requirement.



Selection Item Parameters

- Click on your newly created and named Selection Item
- Click the “Select App” button to the right of the App ID
- From the [ecms] menu item, locate and click on the option that contains the name “Search” or “Selection” for the items your content is related to. It should have an “sr” in front of its name



Selection Item Parameters

- Make sure to check the box for [Always Show Results]
- Then Click the [More...] button
- Optionally, you can select the button to the right of the [Company/Division Number] field, then click the [Globals] tab, click on “Active Company/Division” and the click [Select]. This will limit the resulting list to the co/div you cleared security under.

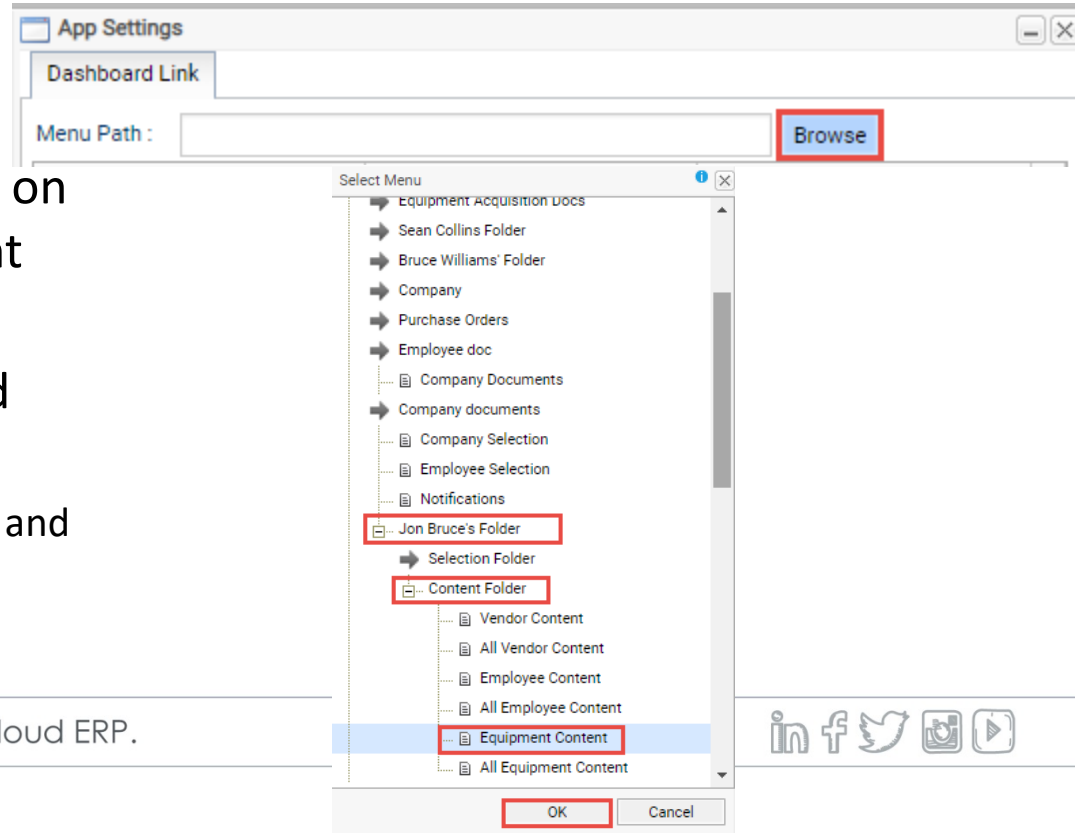
App ID	ecms/srEquipmentNumbe	...
Title	Equipment Number Select	
Minimal UI	<input type="checkbox"/>	
Suppress Drills	<input type="checkbox"/>	...
Company/Division Number		...
Company Number		...
Division Number		...
Equipment Number		...
Job Number		...
Sub Job Number		...
Project		...
Always Show Results	<input checked="" type="checkbox"/>	...
Show Criteria	<input type="checkbox"/>	...

More...

Selection Item – More...

- In the [Menu Path] field click [Browse]
- From the selection screen, click on the arrow to the left of “Content Management”
- Locate and Click on your related Content Item from the list

Note: Click on the arrows to expand folders and subfolders to locate your items.



Selection Item – More...

- While still on the “App Settings” screen, Perform the following:
 - Double click on the COMPDIV line
 - Under the [Assign Global Context] select “Active Company/Division” from the drop down
 - Double click the Event Name related to your content (EQUIPMENT is my example)
 - Under the [Assign Global Context] select the “Active...” option related to your content and then Click [OK]

The screenshot shows the 'App Settings' dialog box. The 'Menu Path' is set to '/Content Management /Jon Bruce's Folder/Content F'. The 'Event' table lists several events, with 'EQUIPMENT' selected. The 'Assign Global Context' column for 'EQUIPMENT' shows 'Active Equipment' selected. The 'COMPDIV' event is also visible with 'Active Company/Division' selected.

Event	Description	Assign Global Context
COMPDIV	Company/Division Number	Active Company/Division
COMPDIV_NAME	Company/Division Name	
COMPANYNO	Company Number	
DIVISIONNO	Division Number	
PROJECT	Project	
PROJECT_NAME	Project Name	
EQUIPMENT	Equipment Number	Active Equipment

Selection List

- Use the Gear button to exit Edit mode
- Click on your Selection Item to see your Selection List
- Use your standard IDI functionality to modify the list to your liking. Add/remove fields, Change Sort, Save View, etc.

Jon Bruce | Computer Guidance INTERNAL ONLY | Equipment Selection

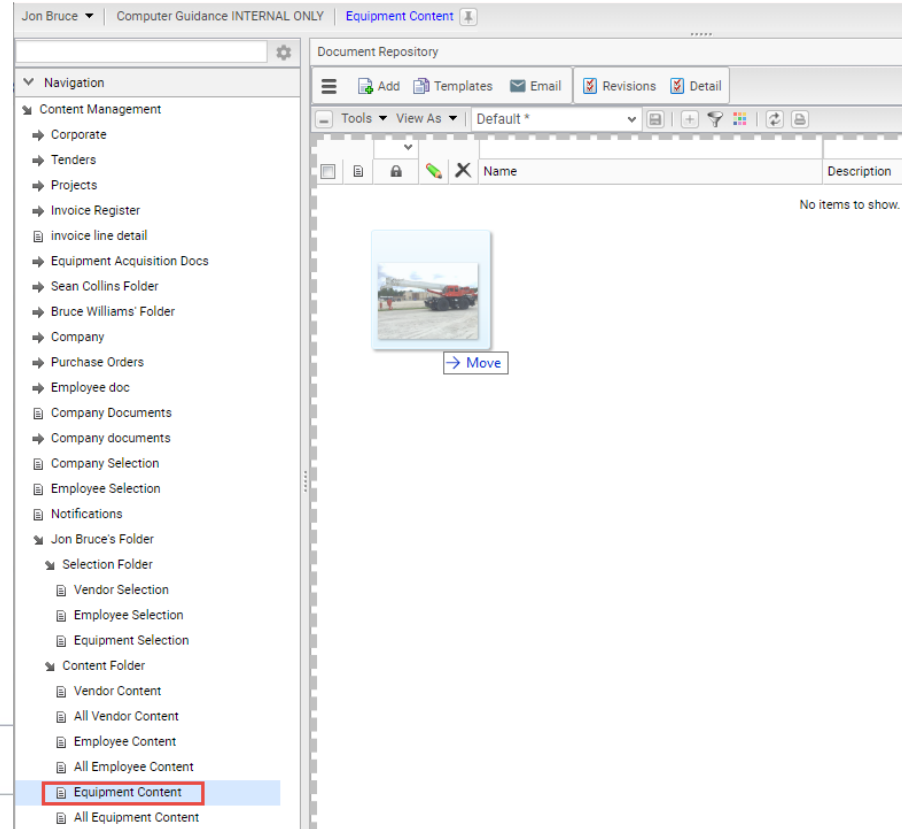
Equipment Number Selection

Tools | View As | Equip Selection

Com...	Div...	Equip ...	Description	Serial No	Model No	Spec No
1	0	600001	CRANE TR 2900 65T 1968	API TestSNVin	2900	
1	0	600002	CRANE TR 2900 60T 1964	29453	2900	
1	0	600003	CRANE 4000W 150T	40987	400W	
1	0	600004	CRANE 4000W 150T 1974	40344	400W	
1	0	610001	Backhoe CAT 416D	3F903440	416BL	BACKHOE
1	0	610002	BACKHOE KOBELCO SK220	LL90887	SK220	BACKHOE
1	0	610003	BACKHOE KOBELCO SK220	LL96645	SK220	BACKHOE
1	0	610004	BACKHOE CAT 416D	8845784938B	416BL	BACKHOE
1	0	610099	Backhoe CAT 416D	cat-164212145	416BL	BACKHOE
1	0	610500	CAT 613 Scraper	4523576897	613	
1	0	610999	Backhoe CAT 416D	9901-a125	416BL	BACKHOE
1	0	618	PU Truck test - source			
1	0	620001	LOADER RT CAT 988 5.5CY	87A334	988	
1	0	620002	LOADER RT CAT 414	87A9887	414	
1	0	620003	LOADER SKID RT 1999	169980	L8170	
1	0	620004	LOADER SKID RT CASE	03145569	75XT	
1	0	620005	LOADER SKID RT CASE .33CY	JAF01345598	1845C	
1	0	620100	CAT 824 Dozer	2436376798	824	
1	0	620105	CAT 140 Grader	2328487	140	
1	0	620500	CAT Asphalt Paver	9832722	AP-100	
1	0	620505	CAT Screed	9834792		
1	0	630002	WELDER DC 600	AC65594	DC600	
1	0	640001	FORD F150 PICKUP 2002	1X987G54039	F150	PICKUP 2
1	0	640002	FORD F150 PICKUP 2003	1X8766SH5756	F150	PICKUP 2
1	0	640003	CHEVY SILVERADO 1/2 TON	56M5876730	1500	PICKUP 1
1	0	640004	CHEVY SILVERADO 1/2 TON		1500	PICKUP 1
1	0	640005	CHEVY SILVERADO 1/2 TON	9878687GF76	1500	PICKUP 1

Adding Content

- In your Selection List, locate the record you want to attach Content
- Double Click on the record
- Notice you are moved to the Content Item Folder
- Drag and Drop Content
- Modify your View to your liking



Viewing Content

- If you want to view all Content for a specific Record, double click on the record in the Selection Item Folder
- If you want to view content from multiple records, Click on the “All...Content” Item Folder

The screenshot displays the 'All Equipment Content' view within the 'Computer Guidance INTERNAL ONLY' application. The interface includes a top navigation bar with the user 'Jon Bruce' and a 'Document Repository' section with tabs for 'Add', 'Templates', 'Email', 'Revisions', and 'Detail'. Below this is a 'Tools' bar and a 'View As' dropdown set to 'All Equip Content'. The main content area features a table with columns for 'Tags', 'Name', and 'Description'. The table lists two records: 'COMPANY-1/0 CONTENTTYPE:Equipment EQUIPMENT:610001' with the file 'Backhoe CAT 416D.jpg' and description 'This is a User defined Description', and 'COMPANY-1/0 CONTENTTYPE:Equipment EQUIPMENT:600001' with the file '600001 Pic.jpg' and description 'Type in here whatever Desc you want'. On the left, a 'Navigation' sidebar shows a tree structure of folders, with 'All Equipment Content' highlighted at the bottom.

Tags	Name	Description
COMPANY-1/0 CONTENTTYPE:Equipment EQUIPMENT:610001	Backhoe CAT 416D.jpg	This is a User defined Description
COMPANY-1/0 CONTENTTYPE:Equipment EQUIPMENT:600001	600001 Pic.jpg	Type in here whatever Desc you want