



# Content Management

Sean Collins



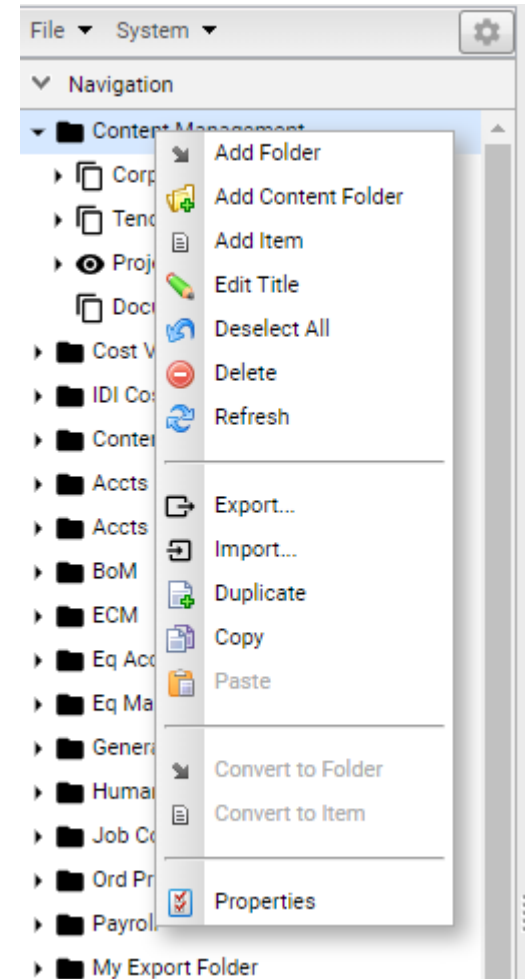
# Overview

- **Document Storage**
  - Organization, Security, Change Tracking
- **Data Entry**
  - Forms, Invoice Register
- **Workflow**
  - Type, Rules



# Create Content Folders

- Click the gear icon to enable edit mode
  - Requires “System Administrator” security level in XCIPIO security
- Right click menu item and “Add Content Folder”
- Alternatively, “Add Item” and set app id to “system/content”



# Organizing With Tags

- Access folder tags by right clicking menu item and selecting properties.
- Tags are inherited from parent folder by default.
- No folder tags means the menu location is used to track documents.

Menu Properties for Project Folder

Tags Security Settings Mail Templates Folder Visibility Tags

**Inherited Tags**

Name ^	Value	Active ^
No items to show.		

**This Folder Tags**

Name :  Value :  Add

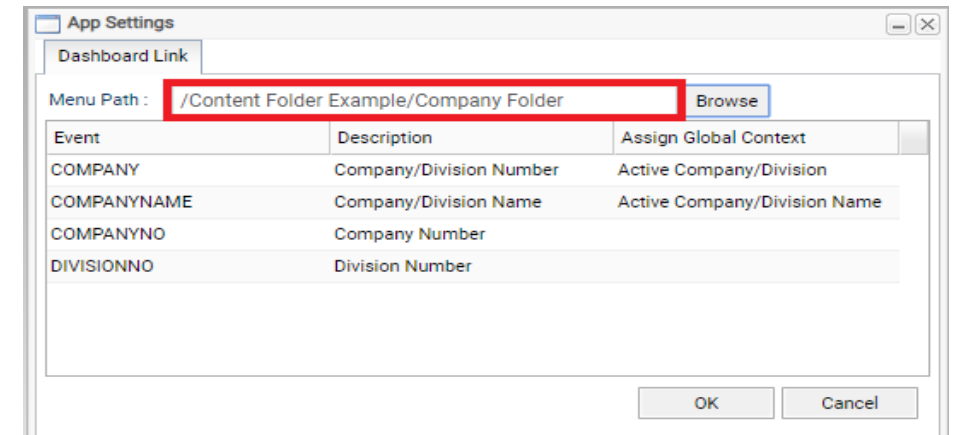
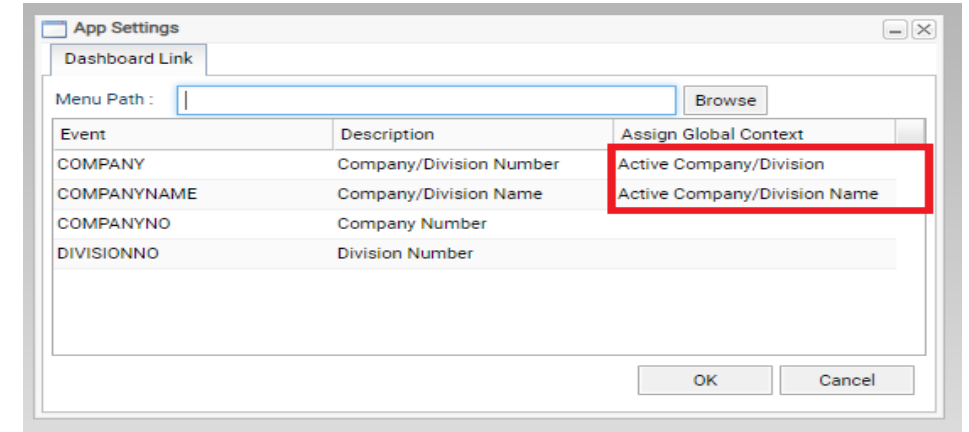
Name ^	Value	Or	
PROJECT	Active Project	<input type="checkbox"/>	<input type="button" value="X"/>

**Composite Folder Tags**

Name ^	Value
PROJECT	Active Project

# Tag Values from Global Context

- Click “More..” button to access app settings.
- Set events to assign global context.
- Set menu path to go to content folder.
- Set content folder to use global context.



# Available Global Context Fields

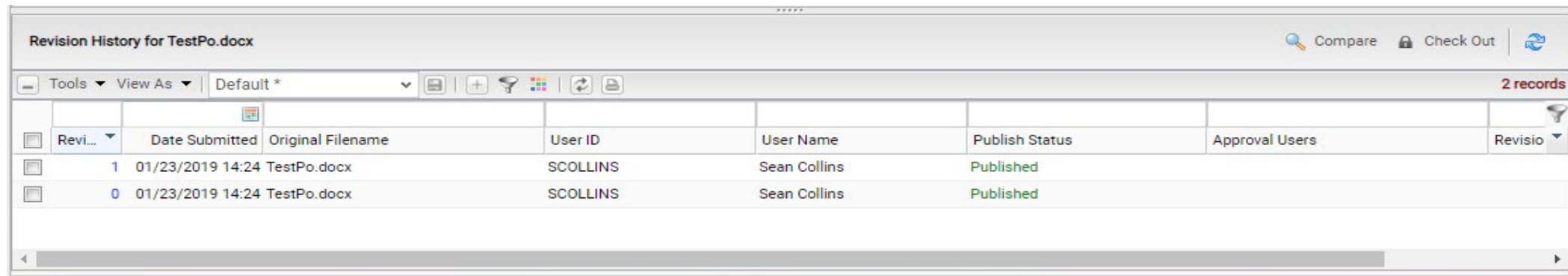
Global Variable	\${GLOBAL:<ID>}	Selection App
Active Project	PROJECT	ecms/srProject
Active Project Name	PROJECT_NAME	ecms/srProject
Active Customer	CUSTOMER	ecms/srCustomer
Active Customer Name	CUSTOMER_NAME	ecms/srCustomer
Active Employee	EMPLOYEE	ecms/srEmployee
Active Employee Name	EMPLOYEE_DESC	ecms/srEmployee
Active Vendor	VENDOR	ecms/srVendor
Active Vendor Name	VENDOR_NAME	ecms/srVendor
Active Subcontract	SUBCONTRACT	ecms/AcctPay/Subcontract
Active Subcontract Description	SUBCONTRACT_DESC	ecms/AcctPay/Subcontract
Active Equipment	EQUIPMENT	ecms/srEquipmentNumber
Active Equipment Description	EQUIPMENT_DESC	ecms/srEquipmentNumber
Active Purchase Order	PO	ecms/PurchaseOrder/POMasterContr
Active AP Invoice	AP_INVOICE	ecms/AcctPay/StandardInvoice
Active AR Invoice	AR_INVOICE	ecms/srInvoices
Active Company/Division	COMPANY	ecms/srCompanyDivision
Active Company/Division Name	COMPANY_NAME	ecms/srCompanyDivision
Active eCMS Company Number	COMPANYNO	ecms/srCompanyDivision
Active eCMS Division Number	DIVISIONNO	ecms/srCompanyDivision

# Tag Security

- Tag Security is in System -> Maintenance
- Secure tags by:
  - User
  - User Group
  - Project Role
- Control actions:
  - List
  - Read
  - Delete
  - Create
  - Revise
  - Move

# Add Files

- Drag and drop files into content folder
  - Need plug-in to drag and drop from Outlook.
- Mail Actions to automatically add and tag files from incoming emails.
- Duplicate checking
- Publish status – Published or Draft
- Revise files by:
  - Check file out
  - Drag new version into revisions panel
  - Check file in



Tools View As Default * 2 records							
Revi...	Date Submitted	Original Filename	User ID	User Name	Publish Status	Approval Users	Revisio
1	01/23/2019 14:24	TestPo.docx	SCOLLINS	Sean Collins	Published		
0	01/23/2019 14:24	TestPo.docx	SCOLLINS	Sean Collins	Published		



# Archiving

- “Archiving” instead of deleting
- Super Administrator can be setup in server configuration to restore archived files or permanently delete them.

# Forms

- User defined UI
- Create in “Template” view of content folder
- Fill in and submit completed forms from template
- Available online and as mobile app
- Handlers drive actions
  - Time Card Entry
  - Crew Time Entry
  - Expense Report Entry
  - Purchase Order Entry
  - Email and Tag

Form Designer

Save Delete Properties Add Fields Add Submit Add Cancel Add Print

Weekly Time Card

Last Day of Week: Week Number: Batch Number:  
LAST\_DAY\_OF\_WEEK WEEK\_NUMBER BATCH\_NUMBER

Select Project: JOB Description of Project

Please specify the activities and hours per week day:

COSTTYPE_LINE	Line Description of Cost Distribution						
Rate Code	Sun	Mon	Tue	Wed	Thur	Fri	Sat
RATE_CODE_LINE	DAY_ONE	TWO	THREE	FOUR	FIVE	SIX	SEVEN

WEEKLY\_ACTIVITY\_SECTION

Please report any injuries incurred & safety concerns:

INJURY

By signing & submitting this Weekly Time Card you promise the hours and information above is true and correct.

SIGNATURE

Submit Powered by Computer Guidance Corporation Cancel

# Currently Available Form Handlers

- Time Entry Sheets
  - Time Entry Sheet
  - Crew Time Entry Sheet
  - Crew Weekly Time Entry Sheet
- Expense Report
- Standard Purchase Order
- Form Tag Utility – Dynamically tag and email forms

# Invoice Register

- Add invoices by:
  - Drag and Drop
  - Mail Actions
  - Expense Report form handler
- Enter and validate of invoice types:
  - Purchase orders
  - Subcontracts
  - Non-PO
- Third Party OCR Support
  - Integrated: ABBYY FlexiCapture
  - Service Based: ABBYY FlexiCapture and Kofax
- On final approval, invoices entered into AP Batch
  - AP Batch auto-processing available

# Invoice Entry Screen

ID : 1421

Fit to Width

Open

**S&G Printing & Office Outfitters**  
 10908 Pikes Peak  
 MailStop 4b  
 Garland TX 76084 USA  
 817-265-9962  
 support@s&gcompleteoffice.com  
 s&gcompleteoffice.com

**Invoice# 12451**

Invoice Date: 2006-01-26 Due Date: 2006-02-10 PO:

**Sold To**  
 Gamma Engineering Inc.  
 Attn: Norman Bailey  
 1002 N.W. Highway 287  
 Mansfield TX 76084  
 USA

**Ship To**  
 Gamma Engineering Inc.  
 1002 N.W. Highway 287  
 Mansfield TX 76084  
 817-457-7558

Ship Via: Federal Express-2nd Day  
 Customer: 20 Charge Code: 12 Terms: Net 15 **Total Due: \$39.80**

Ln #	Quantity	Description	Unit Price	Total
1	10 Each	Stationery Set	3.98 Each	\$39.80

Header Optional Fields Custom Fields

ID : 1421 Date Received : 09/24/2019  
 Invoice Date : 09/24/2019 Due Date :  
 Company : 1/0 CGC Construction Company, Inc.  
 Invoice Type : Non-PO  
 Invoice Number :  
 Invoice Description :  
 PO Number :  
 Subcontract Number :  
 Vendor :  
 Vendor Location :  
 Project :  
 Batch :  
 Total : 0.00  
 Discount Amount : 0.00 Discount % : 0.00  
 Separate Check :  
 Tax Code :

Email Invalid Submit Save Close

Add Edit Delete Reload Line Items Update Tax Code From Header History

Tools View As Non-PO \*

Acct Numb	Project	Cost Distribution	Quantity	Unit Cost	Value	Description
No items to show.						
			0.0000	0.0000	0.00	

Invoice Total : 0.00 Unallocated Amount : 0.00 Net Allocated : 0.00

# Invoice Register Apps

- Invoice Register
  - App Id - system/invreg/list
  - Enter and edit invoices
  - Set security with folder tags
- Invoice Register Detail
  - App Id - ecms/invreg/detail\_list
  - View invoices by cost allocation lines
  - View AP info from process invoices
  - Bulk download and email options

# Workflow Type and Sub-Type

- Determines rules and mail templates
- Add in “Workflow Master”. Enable/Edit in “Enable Workflow”
  - Next version moves all management into “Enable Workflow”
- Enable options:
  - “Activate” – Type is used at all
  - “Selectable” – Type is selectable by user. Events can use types that you don’t want to be selectable up front.

# Applying Workflow Type

- Content folder published status
  - Set “Workflow” parameter on content folder app
- Forms
  - Add “WORKFLOW” parameter on template
- Invoice Register
  - Select subtype from drop down list



# Workflow Rules

- Multiple Stages
- Can be Project Specific
- Can Assign to Roles
- Approval limit controls final approval
- Reject and Over Due Events can change Sub Type
- Send mail requires mail template on type/subtype
- Optional – Selectable approvers
- Actions – Form add/append

The screenshot shows a 'Add Rule' dialog box with the following fields and options:

- Rule:** A dropdown menu.
- Sub Rule:** A dropdown menu.
- Project:** A dropdown menu.
- Stage:** A text input field containing the number '1'.
- User:** A dropdown menu.
- Description:** A text input field.
- Automatic approval for amounts below this value:** A text input field containing '0.00'. A note to the right states: 'Only applies to first stage 1 approver'.
- Approval limit amount:** A text input field containing '0.00'.
- Event:** A dropdown menu with 'Reject' selected. Below it are four empty text input fields.
- Sub rule:** A dropdown menu with five empty options below it.
- Days on queue before this is due:** A text input field containing '0'.
- Days on queue before alarm is sounded:** A text input field containing '0'.
- Sub Rule to reroute to if alarm sounds:** A dropdown menu.
- User to escalate to if alarm sounds:** A dropdown menu.
- Send Mail:** A checkbox.
- Optional:** A checkbox.
- Default select:** A checkbox.
- Buttons:** 'Actions', 'OK', and 'Cancel'.

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# Workflow Assignee Variables

Variable	Description
%U	Current user
%ORIG	Originator of the original approval item
@<subtype>	Divert to the specified subtype
&APPROVE	Automatic final approval below lower limit. Stage 1 only.
&SKIPLO	Skip stage if value less than lower limit.
&SKIPHI	Skip stage if value greater than lower limit.
#<project contact role ID>	Project contact role ID, e.g. #PM = project manager.
#WF_TS:1 or 2	Current user's supervisor 1 or 2