Power & Water Customer Collaboration Documentum:

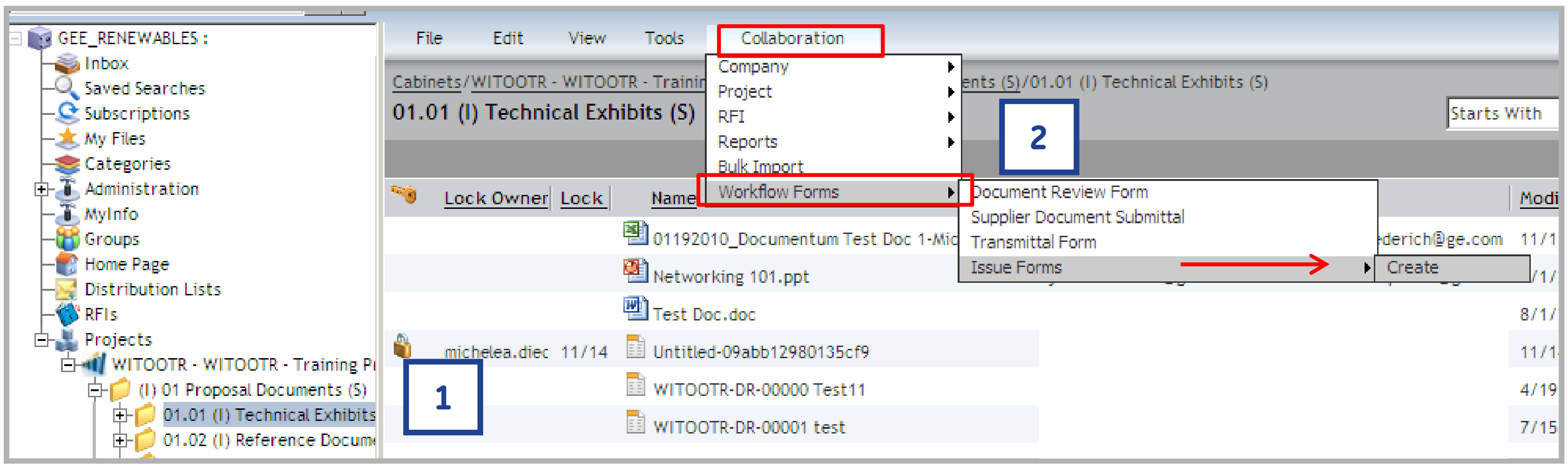
Working with Issue Forms

imagination at work

Module Objectives:

1. Create an Issue Form
2. View an Issue Form
3. Edit Issues
4. Owner - Additional Actions
5. Close an Issue

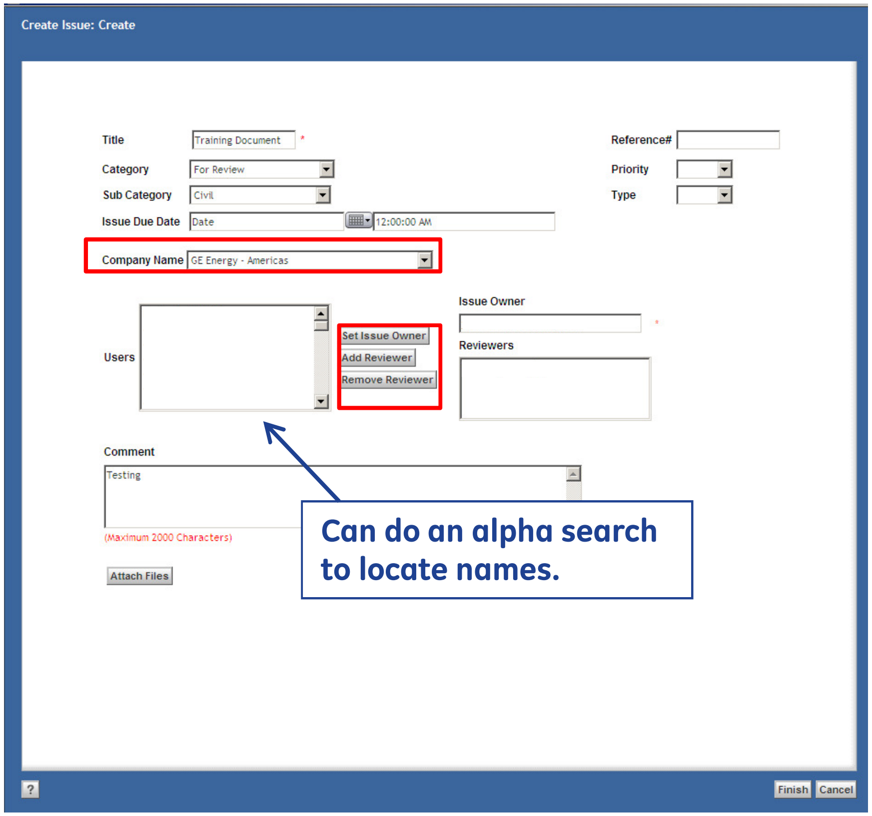
Create an Issue Form



1. Select the folder in the project where the Issue Form should reside.
2. Choose "Collaboration", "Workflow Forms" and "Issue Forms", "Create".

imagination at work

Create an Issue Form



Add attachments (see next screen) and comments as needed.

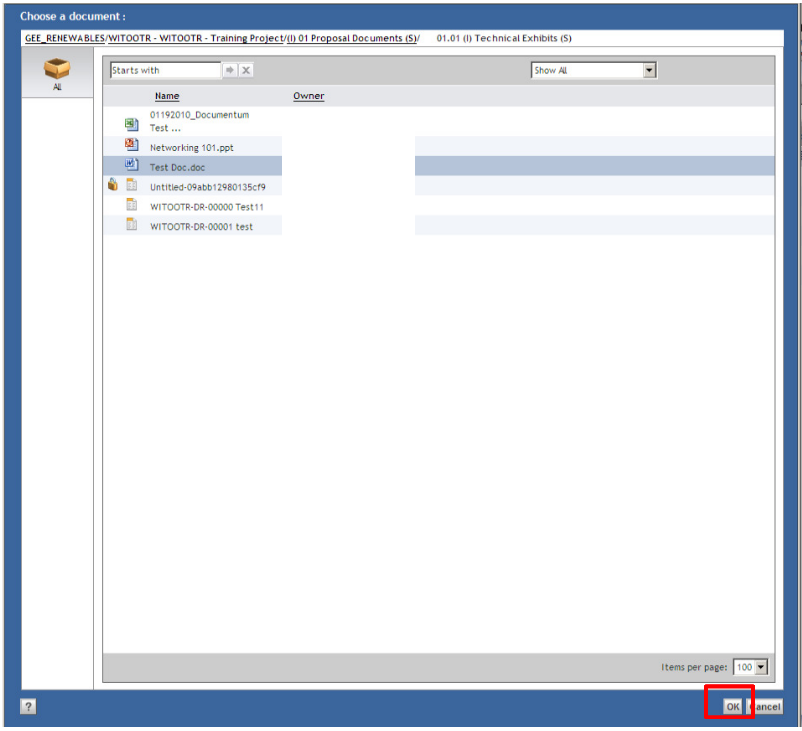
Complete all fields as required in Documentum (red asterisk) and as needed for the business process.

Choose a 'Company Name' from the drop down to correctly populate the "Users" box. Highlight the user to be the Owner and click the "Set Issue Owner" button. To change Owner, highlight a different user from the "Users" box and click the button once more to set that user as Owner.

You may also designate "Reviewers" if needed.

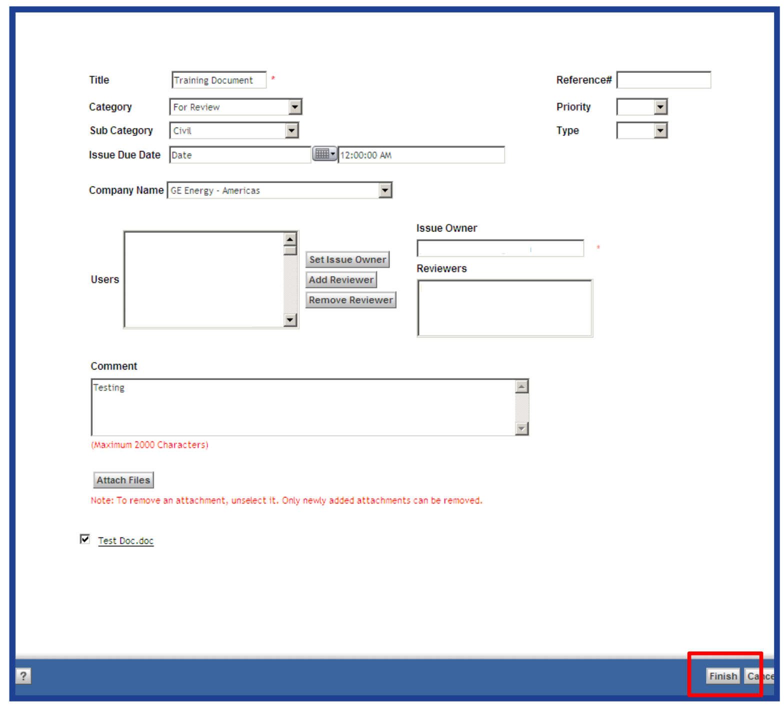
*Even though there is a "Private" choice in the "Type" field, all Issues are private by design.

Create an Issue Form



Highlight chosen file(s) and click "OK" to complete action.

***Files attached must reside in the project where the form is created.**



Click "Finish" to submit the Issue Form.

imagination at work

Create an Issue Form

From:
To:
Cc:
Subject: Notification of Issue Form Created - Training Document

Project: WITOOTR - Training Project

Issue Title: Training Document

Issue Owner:

Due Date:

Creation Date: 11 Jan 2012 10:44:57 EST

Created By:

Create Comments:

- Testing

Attachments:

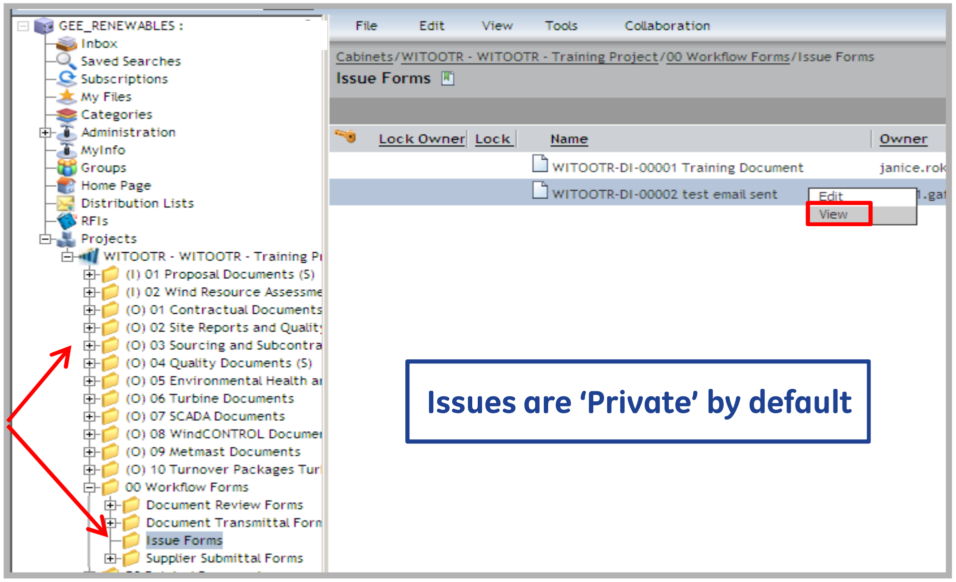
Attachment Name	Folder Path
Test Doc.doc	/WITOOTR - WITOOTR - Training Project/(I) 01 Proposal Documents (S)/01.01 (I) Technical Exhibits (S)

To access this Issue Form, please follow these steps:

1. Click the URL: http://collaborationspace.ge-energy.com/pwcollab/component/rfidrl?strObjId=09abb12980152bb1
2. Enter the SSO ID / Pwd
3. Select P&L Segment: **RENEWABLES**

The Creator, Owner and Reviewers will receive an email notification after the form is submitted. There will not be a task in your Documentum Inbox.
They may access the Issue in view mode from that email or navigate to the form in its project and folder location (see next slide).

View an Issue Form

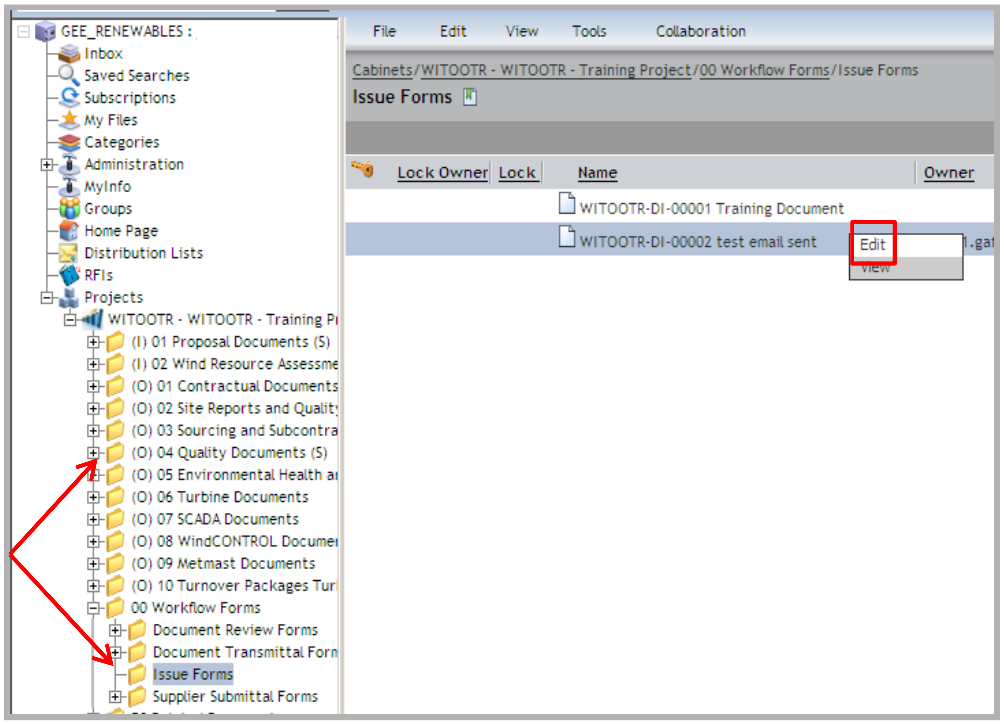


Navigate to the project in which the form was created. Select the folder where the form resides or, expand the "00 Workflow Forms" folder and choose "Issue Forms" to locate the form. Double click on the form in the workspace area (right window), or select the form and right click to open/view it.

The user may also open the Outlook email notification and click the link listed at the bottom to view the form.

imagination at work

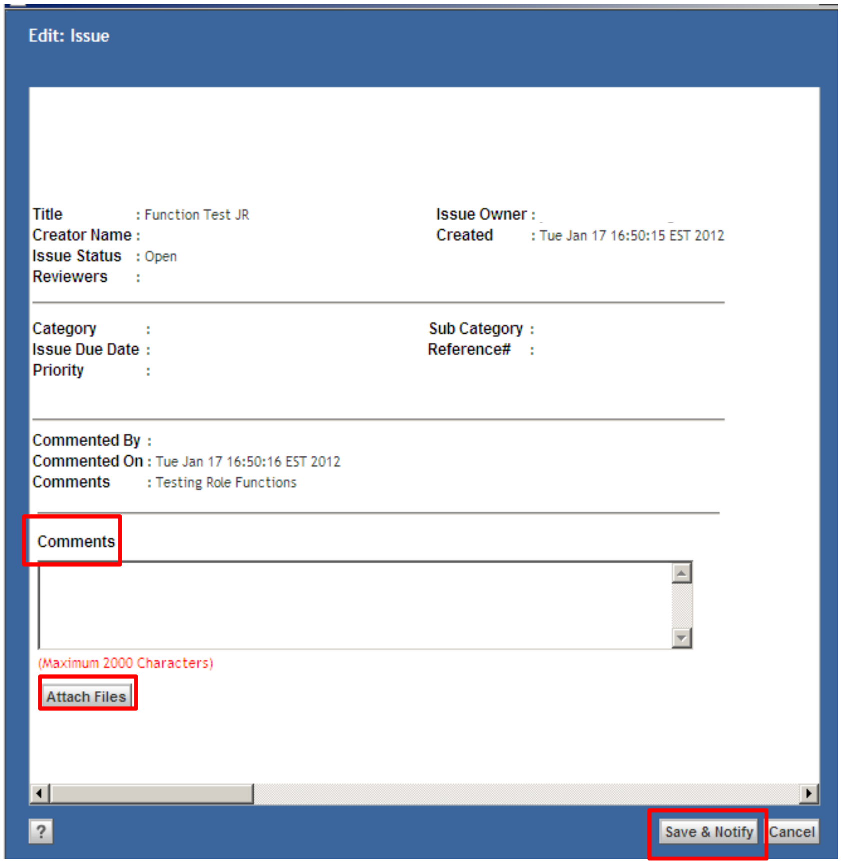
Edit an Issue Form



The Creator and Reviewers can add attachments /comments through the "Edit" function.

Navigate to the project in which the form was created. Select the folder where the form resides <u>or</u>, expand the "00 Workflow Forms" folder and choose "Issue Forms" to locate the form. Right click the form and choose "Edit".

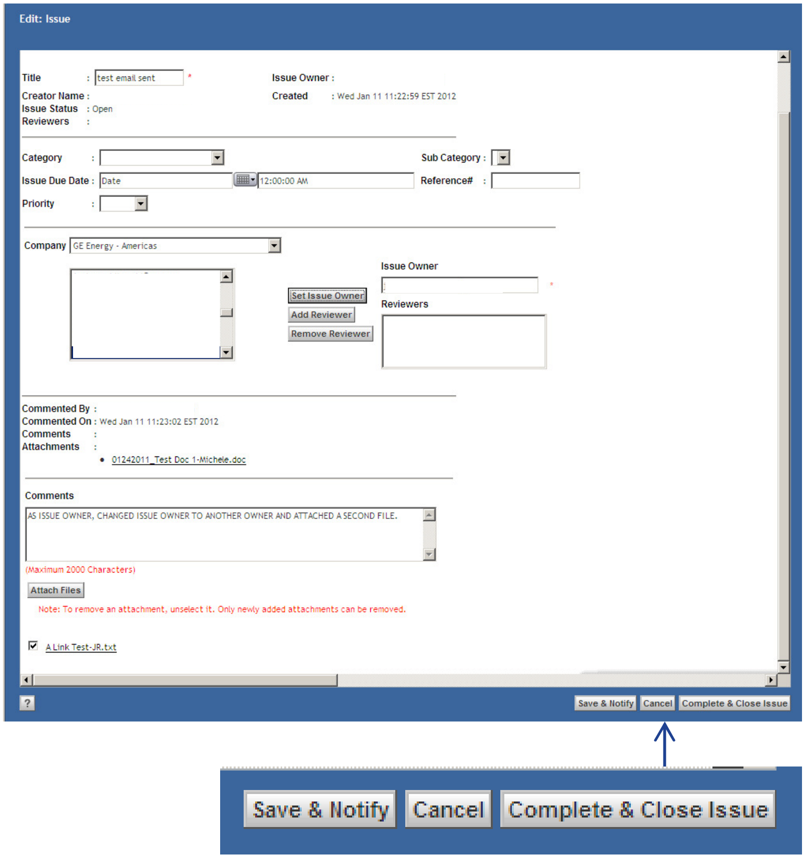
Edit an Issue Form



Once the form opens, you may add attachments and/or comments. Then choose "Save & Notify".

The Issue Owner and Reviewers receive an email notification (Notification of Edit Issue Form). They may access the Issue to view the changes from that email or navigate to the form in its project/folder location.

Owner - Additional Actions



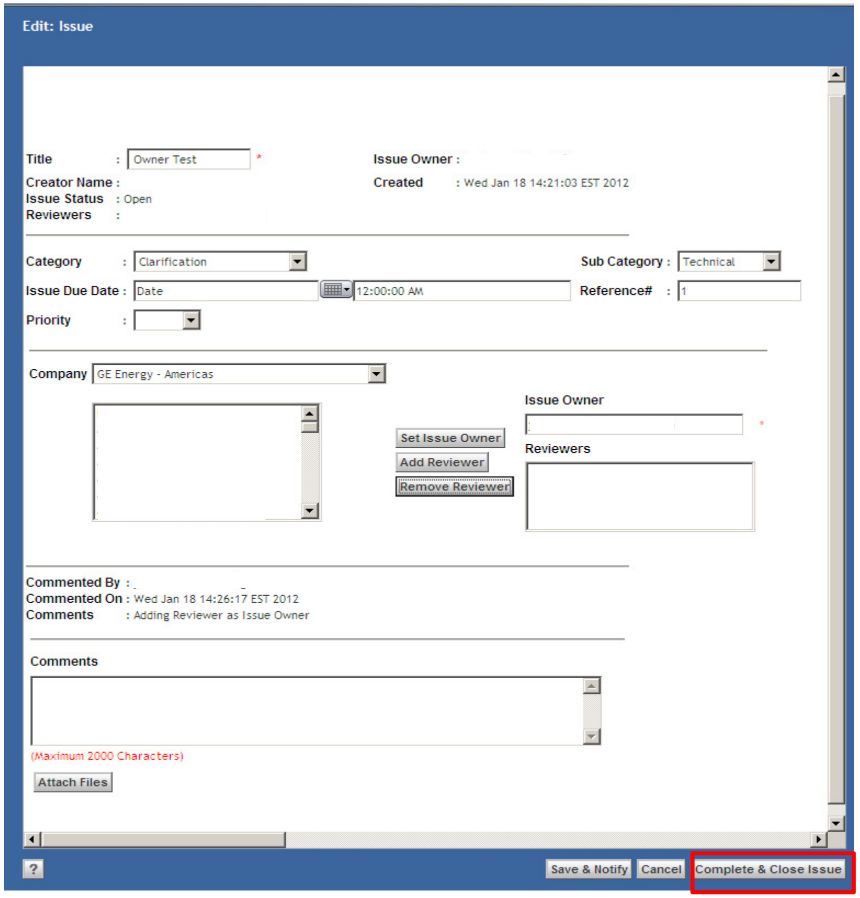
The current 'Issue Owner' is able to designate a different Issue Owner as well as add or remove Reviewers, and add attachments/comments to an open Issue.

Select the Issue in the folder, right click, choose "Edit" to open the form. Highlight the user to become the new "Issue Owner" and click "Set Issue Owner". To add Reviewers, highlight the name(s) and click "Add Reviewer". To remove, highlight an existing Reviewer and click "Remove Reviewer".

The added Reviewers and new Issue Owner receive an email notification.

"Save & Notify" appears when editing an Issue.
"Complete & Close Issue" is only available to the Issue Owner.

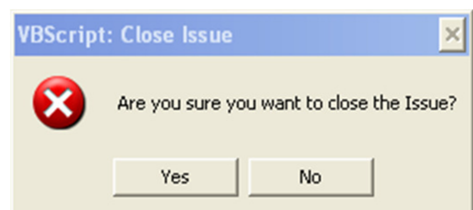
Close an Issue Form



Only the Issue Owner has permission to close an Issue Form.

Navigate to the project in which the form was created. Select the folder where the form resides _or_, expand the "00 Workflow Forms" folder and choose "Issue Forms" to locate the form. Right click the form and choose "Edit".

The Owner may make certain changes to the form, attach files and add comments before closing the form. Then click "Complete & Close Issue". You will receive a confirmation dialog box. Select yes or no as appropriate.



Close an Issue Form

From:
Sent: Thursday, January 12, 2012 3:45 PM
To:
Subject: Notification of Issue Form Closing - test email sent

Project: WITOOTR - Training Project

Issue Title: test email sent

Issue Owner:

Status: Closed

Due Date:

Closing Date: 12 Jan 2012 03:44:57 EST

Closed by:

Closing Comments:

Attachments:

To access this Issue Form, please follow these steps:

1. Click the URL: http://collaborationspace.ge-energy.com/pwcollab/co
2. Enter the SSO ID / Pwd
3. Select P&L Segment: **RENEWABLES**

A closed email notification is sent to the Issue Form Creator, Owner and any Reviewers.

They may access the Issue in view mode from that email or navigate to the form in its project/folder location.