

# Content Profile

## Document Control

### Learning Experience for DELMIAWorks

Our self-paced, virtual and extensive portfolio contains several modules regarding:

#### Document Control

Document Control gives users the ability to manage workflow and external documents, providing complete control and visibility over the entire life cycle of documents. From creation to approval and implementation to obsolescence, document control provides a secure place for documents as well as a means for circulating the current revision, while keeping old revisions on file.

## Document Control

Visual document status indicators that make it easy to determine pending, released, checked out, expired or missing documents and with the ability to link documents to customers, vendors, BOMs, inventory and much more this module makes managing your files easy,

### Training Content Profile (Fundamental)

**Document Control 1** - In this module, you will learn about the different document control libraries and how to create and configure the library.

**Document Control 2** - In this module, you will learn the different ways to add a document into a library.

**Document Control 3** - In this module, you will learn how to create a workflow template for the document authorization within Document Control.

**Document Control 4** - In this module, you will learn how to access team members, add and configure a team member, provide availability in different DELMIAWorks modules, setup out of office delegates, replace and delete workflow responsibilities and access team member from different modules.

### Training Content Profile (Technical Summary)

**Technical Summary** modules combine Technical Modules by DELMIAWorks software functionality in one convenient location with extended videos and additional resources such as manuals and webinars. The Document Control technical summary module includes general module information, DELMIAWorks Quality Manual, a technical video that outlines the steps to configure libraries & team members and quiz.

### Training Content Profile (Overview)

This training session is an overview of the Document Control module including how to create and replace team members, how to create libraries, the differences between the different library types, how to add documents to a library, how to check documents into and out of a library, and how workflow works when approving (or denying) a document.

### Training Content Profile (Advanced)

During this trainer led session, users will be shown how to utilize the Document Control module including how to create libraries, the differences between the different library types, an overview of library and document security options, how to add documents to a library, how to check documents into and out of a library, how to utilize routing & template based workflow types to approve documents including setup, how to associate documents throughout the software using the Documents tab, reviewing document history and revisions and how to search for text in documents.



## Team Members & Quality Basics

Document Control stores and connects documents to various modules throughout DELMIAWorks and requires that users & tasks be configured to ensure the correct user approves, reviews or submits the correct document to the correct record. Team Members grant permissions to these modules for document control while Workflow automates the approval process, sending emails to users when their attention is required for an item.

### Training Content Profile (Advanced)

**Team Members** is a trainer led session and provides an overview of the Team Member Module: including important settings, file paths, delegates, and calendar setup.

### Training Content Profile (Fundamental)

**Quality Basics** is a technical module that outlines how to create and delete Team Members, how to create a Workflow template, how to delegate and replace workflow responsibilities for Team Members, using Team Member and Workflow options and how to use a workflow template to push a purchase order through the approval process.



Contact our Learning Experience Team at [delmiaworks.elearning@3ds.com](mailto:delmiaworks.elearning@3ds.com) for more information!

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