



# Document Control and COMPAS



## How to Use the COMPAS Enterprise v1.5 Document Management System

June 29, 1999



SLIDE 1



# Document Control and COMPAS



## Why Document Control?

- We can find, use and correct the current versions of internal documents
- Errors get identified, fixed, and redistributed
- Correct documentation is delivered to our customers
- Fewer problems occur when people change projects





# Document Control and COMPAS



## WIIFM\*?

- More than just an electronic bulletin board
- Powerful search capabilities
- No “which web-page” problems
- Easier to add and update documents
- Can handle most types of documents
- MRs are linked to documents
- Broadcast announcements for Document and MR updates (via email)
- Single tool (vs. email, web, paper, Sablime, ...)

\* What's in it for me?







# Document Control and COMPAS



## Process Highlights

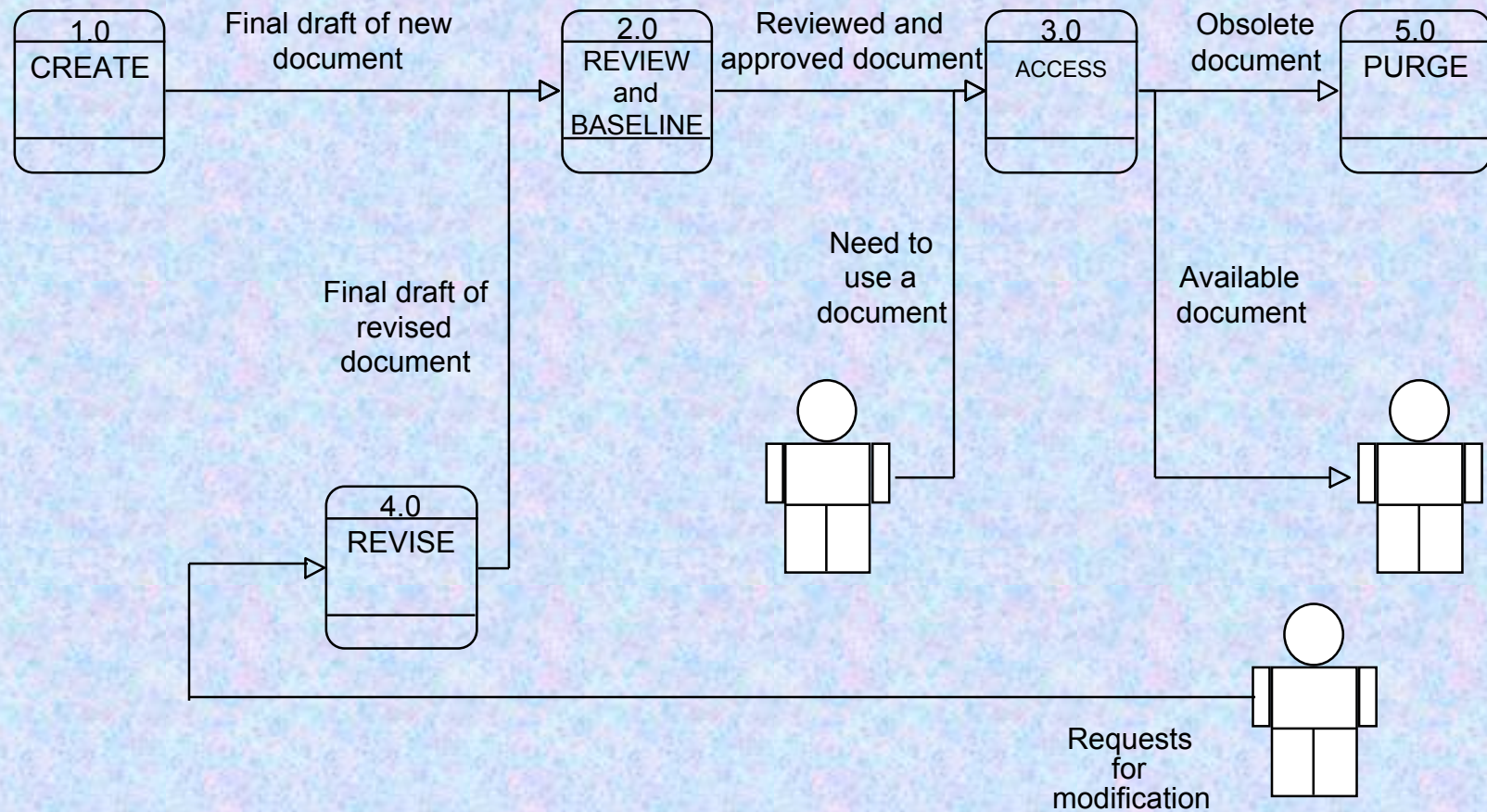
- Concept of a Document Owner
- Document reviews and baselining: formal or informal
- Single database for storage, access, and search, plus access from the web
- MRs, linked to documents
  - helps get past baselining hurdles
  - allows users to publicly request corrections and updates
- A Multi-Platform-Client-based tool to support it all





# Document Control and COMPAS

## Process Overview





# Document Control and COMPAS



## What gets controlled:

Those documents that people need to rely on for information to do their work, especially if the information is the basis of business agreements between different organizations.

### Examples:

- Needs Requests
- Needs Request Estimates
- RFPs
- System Requirements
- Detailed Designs and Interface Specifications
- Test Plans and Cases
- Templates
- References & Standards





# Document Control and COMPAS



## Installing COMPAS on your PC

Go to Web Site:

<http://webserver.com/~compas1>

and follow the installation instructions

– Download and install:

- Compas Client (for PC's, Macs, Linux clients)
- Acrobat Reader (if you need it)







# Document Control and COMPAS



## COMPAS Topics

- Accessing a document
- Notification lists
- Adding a new document
- Making documents accessible from Web pages
- Document reviews
- Updating a document
- Requesting modifications (MRs)
- Finding the status of, and updating, an MR
- On-line descriptions and help
- Advanced topics





# Document Control and COMPAS



## Accessing a document

- Use **Quick Search** if you know the document ID, title, or author, otherwise use **Advanced Search (DocSrch)**.
- Use **Browse** button to view (and to print from your client) , **QikPrint** to print on a network printer, or **Detail** button for other operations.
- The **DocSrch** button in the main window, provides a full relational search.
- From the **Detail** window:
  - **Browse**, to view (and to print from your client)
  - **Print**, to print on a network printer
  - **Copy**, to download documents and MRs to your client.





# Document Control and COMPAS



## Notification Lists

Put yourself on the notification list to find out about revisions, MRs, etc. Each document has its own list.

- Find the document (**DocSrch**), and bring up the Detail window
- Use **File / Notify / Add Me** to add your name to the notification list of a document (just click on Add Me)
- Use **File / Notify / Browse** to see who else is on the list
- Use **File / Notify / Remove Me** to take your name off the list







# Document Control and COMPAS



## Adding a New Document

- First, create the document.
- If not MS Office, Framemaker, plain text, or troff, then also create a postscript or PDF version (when printing, set Printer to QMS-PS 820, and select “Print to File.” Set things back to normal when done!)
- In the main COMPAS window, click on the **AddDoc** button
- Use the **COMPAS Add New Document Assistant**. Fill in all boxes.
- Click on the **Add** button
- Use **File / Notify / Edit List** to create a distribution list. Enter names as lucenthandle@lucent.com.
- Click on **Add/Repl** button - to deliver the document source file to COMPAS.
- Enter the source file name, or use **Browse** to find your source file. Choose Test Copy option on or off. Then use **OK** button to start the file transfer.
- If needed, also deliver the postscript file.





# Document Control and COMPAS



## More on Adding Documents

- Before you begin, check that the document isn't already in COMPAS!
- Some people find it useful to have a printed list of system/release/subsystems and types available, in order to choose the correct values.
- For a document that deals with more than one project step (e.g. proposal, definition, development), use the latest step for the document type.
- The Size field should give the number of pages.
- The document to be added must be accessible by your client.
- If your process requires hard-copy documents (not recommended), just add the COMPAS ID to the title in the document then give it to the COMPAS Administrator for filing.

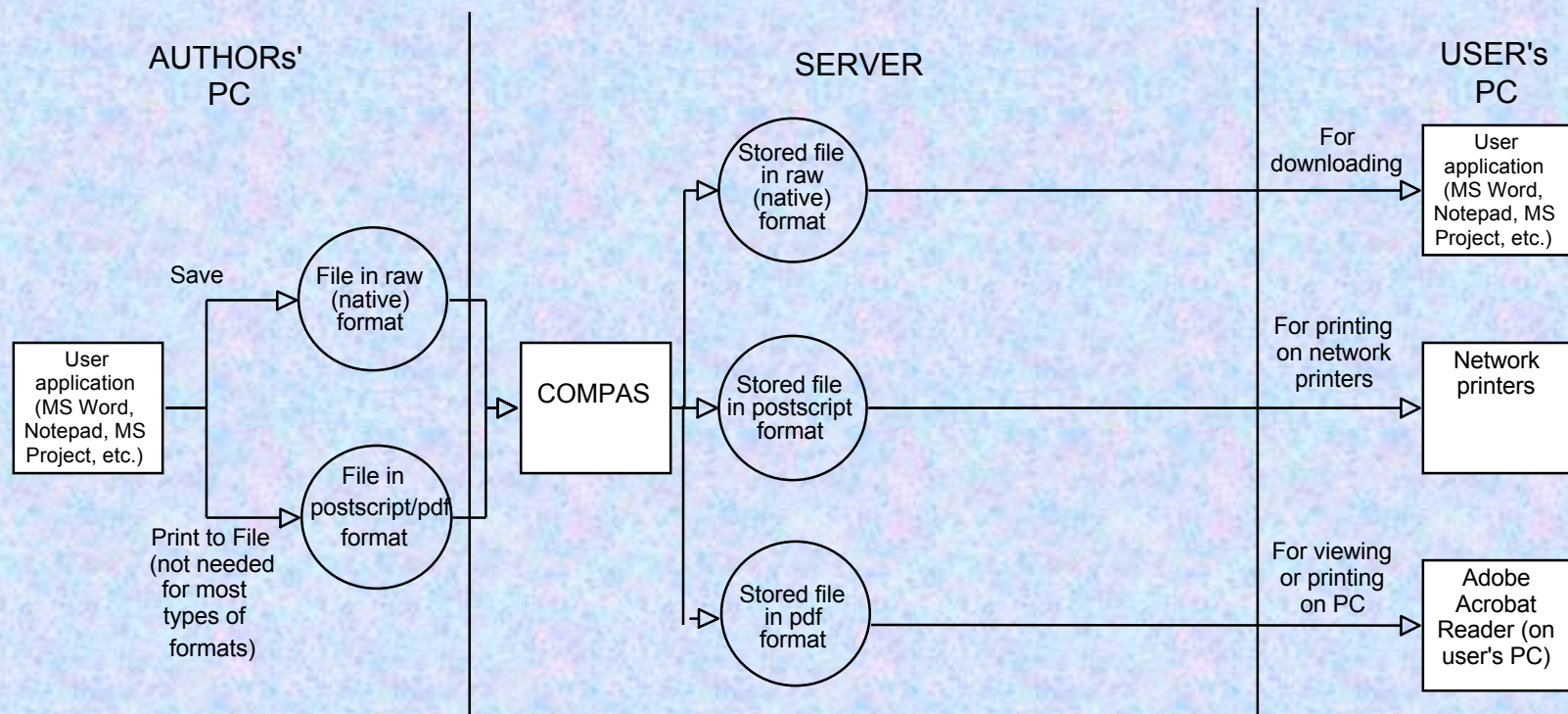




# Document Control and COMPAS

## COMPAS uses several file formats

- Raw (native) for downloading
- Postscript for input to COMPAS
- PDF for viewing from COMPAS







# Document Control and COMPAS



## Making Documents Accessible from Web Pages

- To link from your web page to a document in COMPAS with ID#XXX, in its native format:

<http://yoursite.com/~compas1/cgi-in/wwwcompas.cgi?prodid=XXX&dformat=raw>

- To link from your web page to a document in COMPAS with ID#XXX, to be read by Acroread:

<http://yoursite.com/~compas1/cgi-bin/wwwcompas.cgi?prodid=XXX&dformat=pdf>

- To see other examples:

<http://www.mesaridge.com/compas> Features section: Web Link to Stored Documents

- Simple HTML Forms Interface:

<http://yoursite.com/compas>





# Document Control and COMPAS



## Updating a document

- Find the document (**DocSrch**), and bring up the Detail window.
- Update the attributes (e.g. date, issue, size), then click the **Save** button.
- Click on **Add/Repl** button
- If this is a controlled document in the chg-ctl status, then you need to have an **approved MR** in order to update the document in COMPAS.
- Enter the file name, or use **Browse** to find your file. Select Portrait or Notification option on or off. Then use **OK** button to start the file transfer.







# Document Control and COMPAS



## Requesting modifications (MR)

- Find the document (**DocSrch**), and bring up the Detail window
- Use the **New MR** button to create a new MR.
- Use the MR Wizard to enter the type, category, severity, and abstract
- Type in your description, then **Next**, then **Finish**.
- Wait while COMPAS updates the database. The MR will automatically be assigned to the document owner.







# Document Control and COMPAS



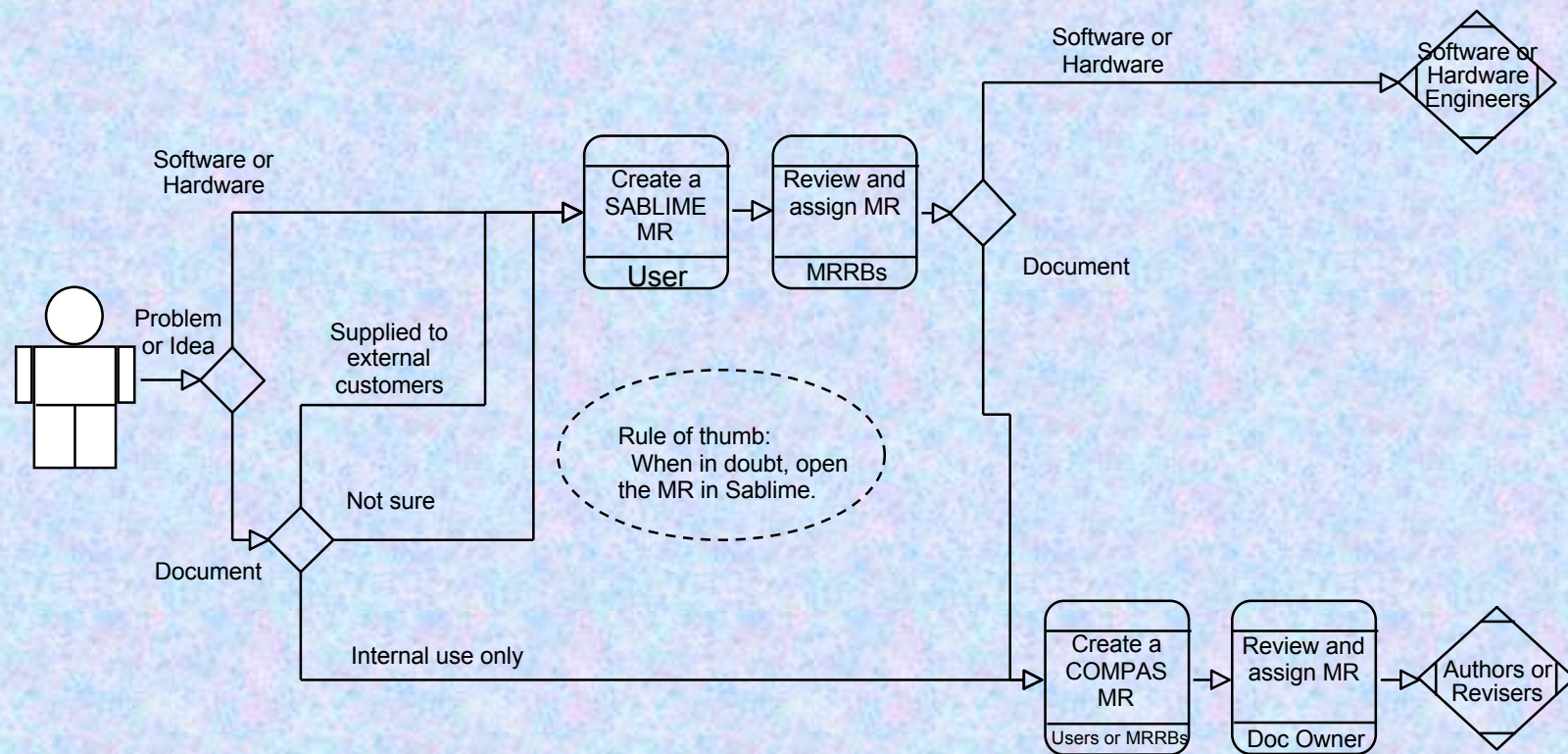
## Document Reviews

- Formal reviews
  - Find the document (**DocSrch**) and bring up the detail screen.
  - Use **File / Create Review**
  - Use the COMPAS Assistant to enter roles and meeting times, and to generate forms and emails
- Informal reviews
  - Use COMPAS, or email, or paper, as decided by the document owner.



# Document Control and COMPAS

## MRs: COMPAS or SABLIME?





# Document Control and COMPAS



## MRs: Getting the Information

- Find the MR (**MRSrch**), and bring up the MR detail window
- Use the **Descrip** buttons to browse the description and annotations
- Use the **Resol**, and **History** buttons to browse the resolution and history
- Use **File/Report** to get all of the information







# Document Control and COMPAS



## MRs: Updating

- Find the MR (**MRSrch**), and bring up the MR detail window
- Use **Edit** to
  - append to the **description** (but don't change the original!)
  - enter or append to the **resolution**
  - **annotate**
- Use the **Status** button to change the status





# Document Control and COMPAS



## MRs Gotchas

- For **type**, don't use “external” (can't be updated)
- For **category**, use your best guess (we're not using this feature, for now)
- Leave **comment** blank (ditto)





# Document Control and COMPAS



## On-Line Descriptions and Help

- On-line help from the COMPAS client
  - <http://www.mesaridge.com/compas/help>
  - <http://www.mesaridge.com/compas> (especially under “features”)
- On-line COMPAS tutorials:
  - <http://www.mesaridge.com/compas/tutorials.html>
- On-Line COMPAS Training Slides:
  - <http://www.mesaridge.com/compas/documents.html>







# Document Control and COMPAS



## Advanced Topics

- Linking documents within COMPAS
- Folders (on the main window)
- Customizing your client software
  - Choosing a document browser
  - Choosing an editor
- Inspections





# Document Control and COMPAS



## Linking COMPAS documents

A way to make the reader aware of related documents:

- Open the Detail window for the document
- **Edit / Document Links**
- Enter the ID of the related document. Click the “Add” button. This establishes the link.
- Note that the Links field in the Detail window changes from “no” to “yes”
- The link is in only one direction. It does not appear in the detail window of the other document, unless its owner creates another link to yours.





# Document Control and COMPAS



## Folders

A collection of documents that **you** use frequently.

- From main menu, use **Edit / Personal Folders** to create new folders, remove folders, add documents to folders and delete documents from folders.
- To add documents to Folders, you may also - from the Document Detail Window for an ID use **File / Store in Folder**.







# Document Control and COMPAS



## Customizing the Client

- From the main menu, click Edit Preferences
- **General** - for Print defaults, and Document Delivery defaults
- **Helper Apps** - to specify document browsers and editors for specific file types.
- **Network** - to specify your choice server computers.





# Document Control and COMPAS



## Inspections

- In addition to document reviews, COMPAS also supports detailed document inspections.
- The Inspection system primarily supports 'code' type inspections but can easily be used for document inspections as well.
- Can be part of your processes if you find it to be useful.





# Document Control and COMPAS



If you have questions:

- Call your COMPAS Administrator
- Email [info@mesaridge.com](mailto:info@mesaridge.com)
- Call any other member of your Document Control Team

