

KB188220848: ArtiosCAD Enterprise - How is an Attribute Category assigned to a document in ArtiosCAD Enterprise

Question

How is an Attribute Category assigned to a document in ArtiosCAD Enterprise?

Answer

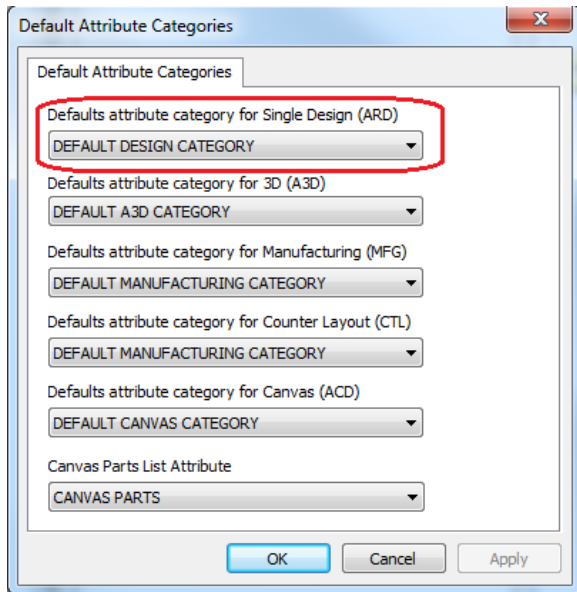
Specifying the attribute category

Attributes Category assignment is influenced by the type of container the document is saved to and the type of project saving action that occurs within ArtiosCAD.

Category Assigned to a container type

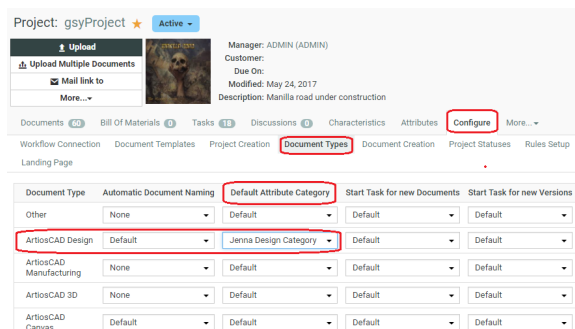
Document type configured in ArtiosCAD defaults.

This category is specified in ArtiosCAD Enterprise, by navigating to **Options > Defaults > Database Defaults > Default Attribute Categories**.



Document type configured for the project.

This category is specified in WebCenter by navigating to **Project > Configure > Document Types**.



Article information	
Applies to	ArtiosCAD Enterprise 14.0.1 (for all information but tasks) ArtiosCAD Enterprise 16.1 (including tasks)
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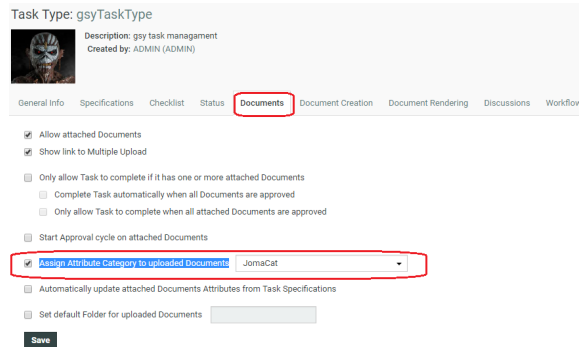


Note

It is beyond the scope of this article, but keep in mind that **Admin > Preferences > Document Types** and **Document Types configurations** in templates from which projects can be created, also influence how the **Default Attribute Category** may be specified for a project. The net result is that a project can assign an **Attribute Category** to document types as they are saved to the project

Task Type

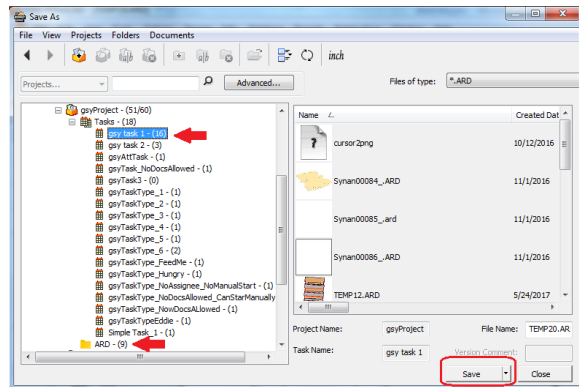
This category is specified in WebCenter by navigating to **Task Types > Types > task type > Documents** and setting the **Assign Attribute Category to uploaded Documents** option and specifying a category.



Saving action

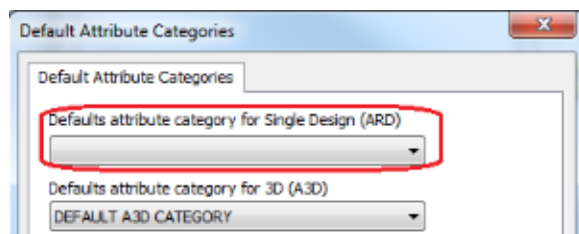
saving a new document

When users save a new document in ArtiosCAD (**Save As** or **Save** (for the first time)), they can select a project or a task.



Attribute category specified

If an attribute category is configured for a particular Document Type in **ArtiosCAD defaults**, that category will always be assigned to the document. It does not matter if the user saves to a project (or folder) or task and it does not matter how the project or task is configured. The ArtiosCAD Attribute Category is always used.





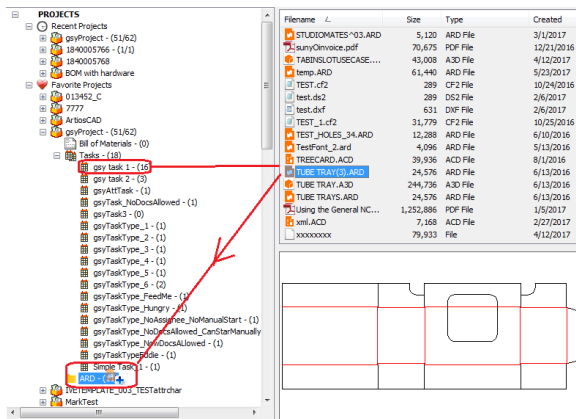
No attribute category specified

If no Attribute Category is configured for the Document Type in ArtiosCAD Defaults, then the Attribute Category configured for the [project document type](#) or [task type](#) is assigned to the document, depending on whether or not the user saves to a project/folder or a task. If no Attribute Category is assigned to the containing entity, then no Attribute Category is assigned to the document.

The save is a backend operation. This means that while the document is being saved, no attribute list is available to the user until after the document is saved. Once the document is saved, the attributes in the category configured for the project or task are visible to the user in read-only mode.

Dragging an unmanaged document...

An unmanaged file can be dragged to either a project or a task.



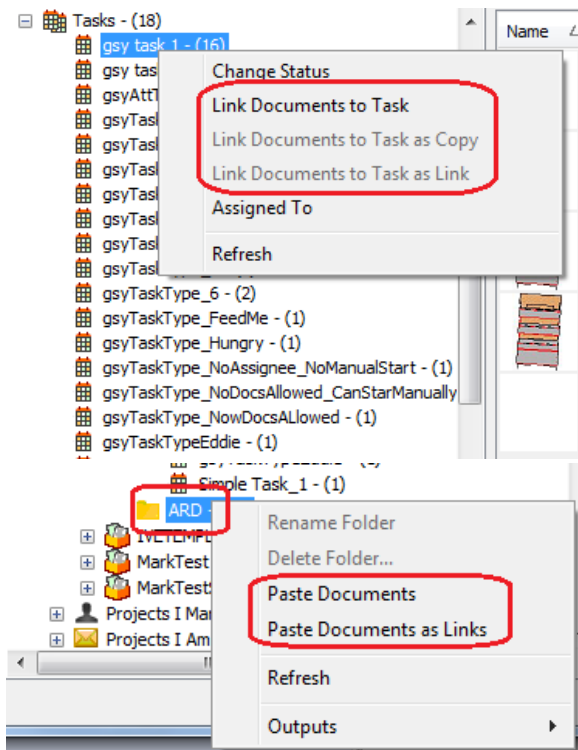
ArtiosCAD attribute category does not matter

The container can be a [project](#) or [task](#). The document being dragged to the container will inherit the Attribute Category of that container. It does not matter what Attribute Category has been defined in [ArtiosCAD defaults](#). The ArtiosCAD Defaults Attribute Category will always be ignored.

If no Attribute Category has been configured for the container, then no Attribute Category is assigned to the document.

Linking a document to a task...

An existing managed document can be linked to a task. A document can also be moved, copied or linked to another document.

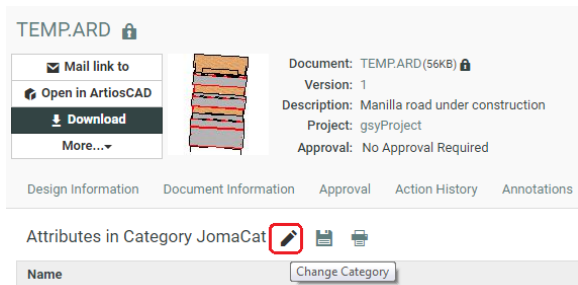


⚠ Linking et al

Once a document is saved to Enterprise, it always maintains its Attribute Category regardless if linked to a task or copied/moved/linked in a different project.

Changing category in WC

If the attribute category is changed in WebCenter:



⚠ WebCenter attribute category

When ArtiosCAD next opens that document, the Attribute Category as changed in WebCenter will be brought into ArtiosCAD regardless of what the attribute category may have been set to in Defaults.

The attributes are viewable but are considered read-only and may not be changed.

If the user restores the original Attribute Category in WebCenter in a subsequent step, the original Attribute Category will also be restored in ArtiosCAD.

Any attribute that is common to the original and new Attribute Categories will be visible regardless of what Attribute Category is actually set.