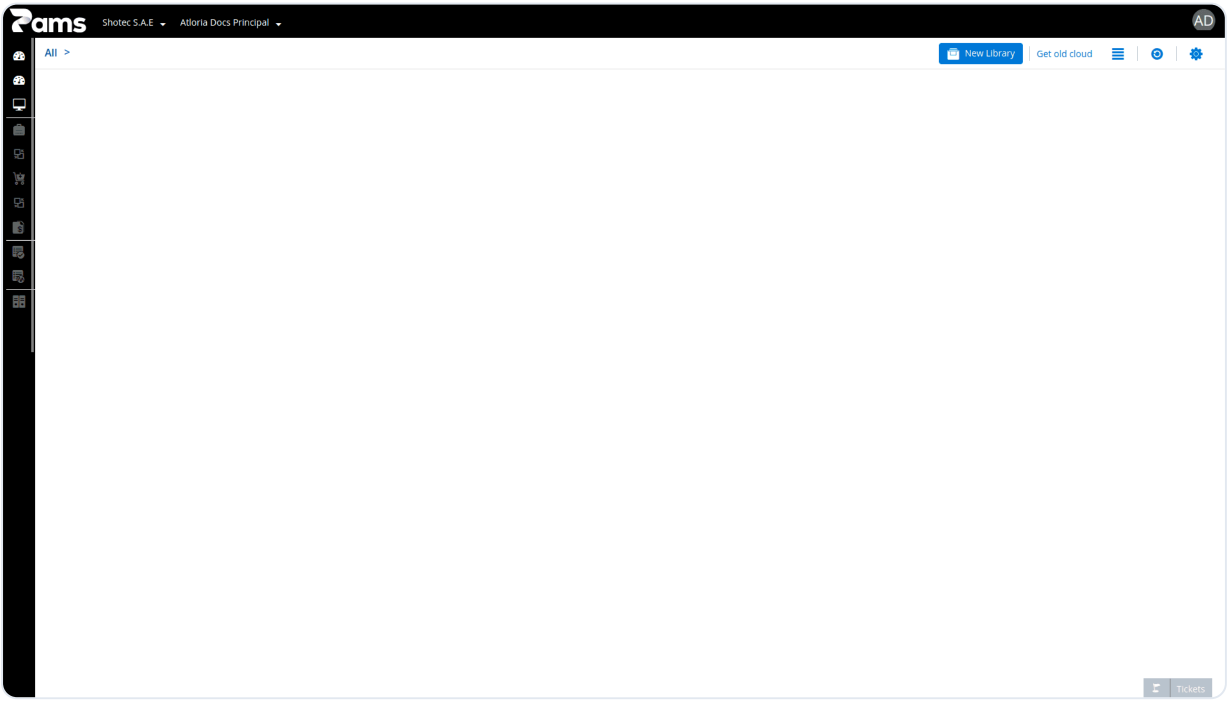
PAMS V2

Libraries

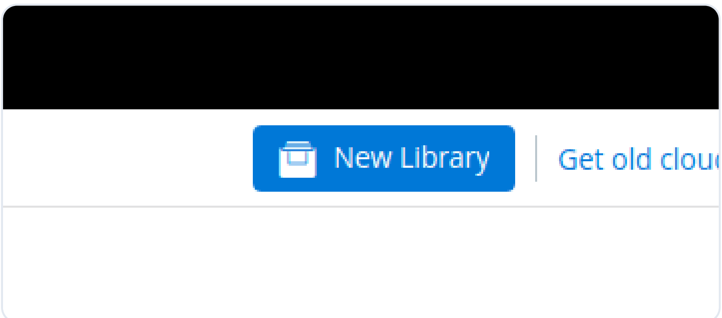
August 1, 2026

Libraries

Applications › Libraries



Libraries — Libraries



Overview

Libraries provide a central workspace for maintaining file collections used in day-to-day commercial and operational work. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and inventory controllers can use Libraries to create and maintain a library, work with its files, assign roles, and access related ticket or attachment actions.

Use a library when files need to be grouped and maintained in one place rather than handled as isolated items. Review the current library list before creating another library to avoid creating duplicates.

Settings

Before using a library operationally, review the roles associated with it. Select a library and use **Roles** to open the role-related controls available for that library. The screen does not provide descriptions of individual role options; therefore, use only roles that are appropriate for the library's intended business use.

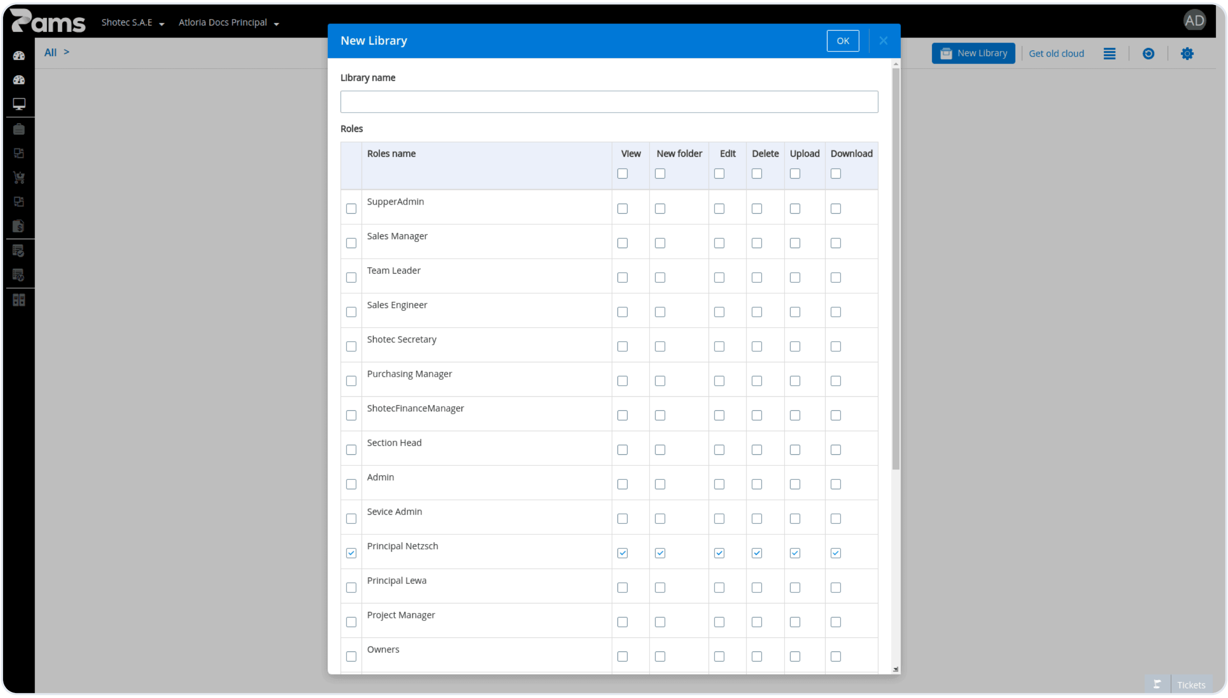
> **Note**
> Configure or review roles before relying on a library for shared work. The available **Roles** action is the only role-related control provided on the Libraries screen.

Use **Edit** to review or amend an existing library. Confirm changes with **OK** or discard them with **Cancel**.

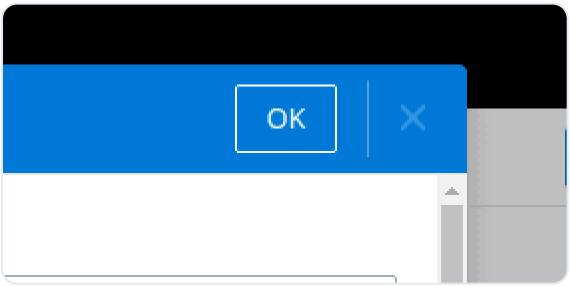
Workflow

1. Review the current library list before deciding whether to create or update a library

Open **Libraries** from the application navigation. The Libraries screen displays the available library records and the associated **files[]** content.



Libraries — Libraries

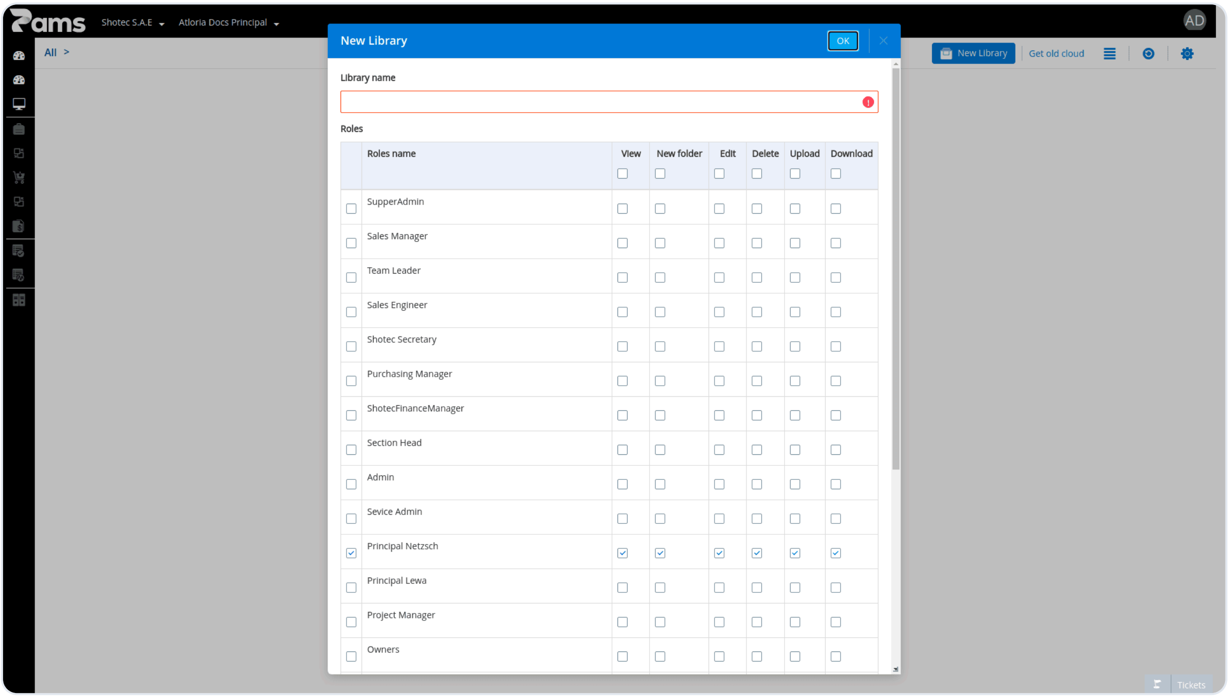


1. Review the listed libraries and their available files.
2. If an appropriate library already exists, select it and continue with the review or update decision.
3. If no suitable library exists, choose **New Library** to begin a new library record.

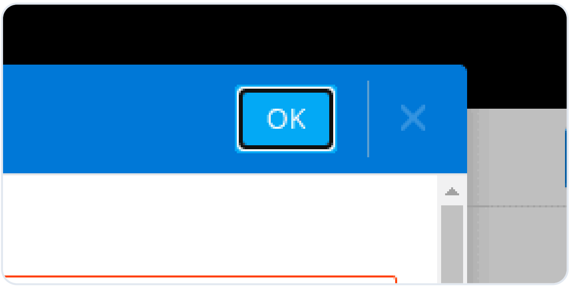
The screen also provides **icn-table-active** and **icn-update** actions. Use these controls as available on the screen when working with the displayed library list.

> **Tip**
> Review existing libraries first. Creating a new library should be the decision made only when the required file collection does not already have a suitable record.

2. Decide whether to create a new library or revise an existing one



Libraries — Libraries



1. To create a library, select **New Library**.
2. Complete the information presented for the new library.
3. Select **OK** to confirm the new record, or select **Cancel** if you decide not to create it.
4. To revise an existing library instead, select the relevant record and choose **Edit**.
5. Make the required changes and select **OK** to retain them. Select **Cancel** to leave the record without confirming the current changes.

The provided screen data does not identify the individual fields displayed after selecting **New Library** or **Edit**. Enter only information required by the form that opens.

> **Warning**
> Use **Cancel** when the record is not ready to be confirmed. Do not use **OK** merely to leave the editing view, because **OK** is the available confirmation action.

3. Decide whether roles need to be reviewed for the library

1. Select the library whose roles you need to review.
2. Choose **Roles**.
3. Review or maintain the role information available in the resulting view.
4. When the role-related information is complete, select **OK** to confirm it, or select **Cancel** to abandon the current changes.

Use this decision point whenever the library is intended for a different group of users or when its existing role information must be checked before continuing work.

4. Decide whether to associate files, tickets, or attachments with the library

1. Select the relevant library.
2. Review the **files[]** content to determine whether the necessary files are already associated with the library.
3. When you need to use the attachment action, select **Attach** and complete the action presented by the application.
4. When you need to access the ticket-related action for the selected library, choose **Tickets**.
5. Return to the library list and review the displayed files again as required.

The screen provides **Attach** and **Tickets** as separate actions. Use the action that matches the business item you are handling; do not assume that attaching a file also creates or updates a ticket.

5. Decide whether the displayed library information must be exported

1. Confirm that the library list currently displayed is the information you intend to use.
2. Select **Export**.
3. Complete the export action presented by the application.
4. If the list needs to be refreshed before export, use **icn-update** and then recheck the displayed libraries and files before selecting **Export**.

Export is a decision made after reviewing the current screen content. If you have just created or edited a library, confirm the record with **OK** before exporting the list.

Examples

A project manager is preparing a shared library for the Northstar Office Fit-Out project. The project contains supplier documents, drawings, and commercial files that must be kept together for the project team.

1. The project manager opens **Libraries** and reviews the existing records and their **files[]** content.
2. No existing library is suitable, so the project manager selects **New Library**.
3. The project manager completes the information requested in the new-library view, identifying the library for the Northstar Office Fit-Out project.
4. The project manager selects **OK** to confirm the new library.
5. The project manager selects the new library and chooses **Roles** to review the role information available for the library.
6. After completing the required role-related review, the project manager selects **OK**.
7. The project manager returns to the selected library, uses **Attach** when an attachment must be associated with it, and uses **Tickets** when ticket-related work is required.
8. Before distributing the current list externally or retaining it for project records, the project manager selects **icn-update** to refresh the Libraries screen and then selects **Export**.

The result is a confirmed library record with its available file content, reviewed roles, and any required attachments or ticket-related activity handled through the corresponding actions.

Tips

> **Tip**
> Use a clear business purpose when creating a library, such as a sales job, project, buyout package, or warehouse document set. This helps users decide whether an existing library is suitable before creating another one.

> **Note**
> The Libraries screen identifies file content as **files[]**. Review this content directly rather than assuming a library contains the file you need.

> **Tip**
> Use **icn-update** before **Export** when the most current displayed library

> information is required.

Troubleshooting

Symptom	Likely cause	Fix
The library you need is not visible in the current list.	The library may not yet have been created, or the displayed information may need to be updated.	Use **icn-update** to refresh the screen. If no suitable library exists after review, select **New Library**.
Changes to a new or edited library are not retained.	The record may have been cancelled rather than confirmed.	Reopen the record with **New Library** or **Edit**, complete the required information, and select **OK**.
You need to work with role information for a library but cannot find it in the file list.	Roles are accessed through a separate action rather than through **files[]**.	Select the library and choose **Roles**.
You need to handle a related ticket or attachment.	These are separate library actions.	Select the relevant library, then use **Tickets** for ticket-related work or **Attach** for attachment-related work.

Related pages

- Libraries — Overview
- Libraries — Learning Path