# **Documentum D2**





## **User Manual**



Version 11.0 Published: April 2021

Documentum D2 Table of Contents	
What is Documentum D2?	<u>3</u>
D2 Log In / Log Out	<u>4</u>
D2 Workspace Overview	<u>5</u>
D2 Workspaces Introduction/ Widget descriptions	<u> </u>
Contributing Content	
Assigning a Working Folder	<u>    10</u>
Importing New Document	<u>12</u>
Import File Edit Properties Window	<u></u>
Edit Existing Document	<u></u>
Editing Document Properties	<u></u>
Expire Document	<u></u>
Published Email	<u></u>
Search	
Text Search (or Quick Search)	<u>30</u>
Advanced Search / Save Search	<u>30</u>
Tips & Tricks	
Drag & Drop	<u>33</u>
Best Practices	<u>36</u>
Resolving JAVA Pop-up Issues	<u>37</u>
Frequently Asked Questions	<u></u>
Appendix	
Documentum D2 Customer Support Process Flow	<u>45</u>

#### What is Documentum? or D2?

Documentum is an electronic document management system that stores, manages and automatically publishes documents. As the new countywide content management solution, it replaces the Stellent Content Management System previously used. Documentum D2 is a web-based user interface that provides users the ability to interact with content in one or more folders based on your specific security rights. This guide will highlight common D2 usage and features.

The light bulb 🍾

represents a special attention to detail to assist you in using this D2 user manual.

#### What's New, What's Different from Stellent CMS

- 1. Unlike Stellent, D2 presents a Windows Explorer-like interface that allows you to view folders and document lists in a familiar format.
- 2. Documentum has the capability to import multiple files at one time.
- 3. In Documentum, documents are published automatically on a programmed interval cycle.
- 4. Your user ID and password will allow you to access your departments' folder and specific folders that are assigned to you. For example, departments cannot see each other's documents and within one department, individuals may not be able to view all folders – only the folders they have permission to access and actively use.
- 5. In Documentum, the documents have a new name format that is system generated:
  - a. Document ID\_ Original Filename.extension
  - i.e.:(7 digits) 1933180\_2014Samplefile.docx

#### D2 Login / Logout

#### How to Login

- URL:Login the D2 URL Login window:<br/>testing environment: <a href="http://sdstest.lacounty.gov/D2">http://sdstest.lacounty.gov/D2</a><br/>production environment: <a href="http://sds.lacounty.gov/D2/">http://sds.lacounty.gov/D2</a><br/>The D2 Login window appears.
- **Step 1:** Select iddsds under the Repository drop-down arrow selection.
- **Step 2:** Enter the Employee Login (Your e+ employee number) and Password.
- **Step 3:** Enter the password.

Note: Users sign into D2 with the same ID and Password used on Mylacounty.gov. Remember both the Login and Password are case-sensitive!

Authenticati	tion									
Repository: * Login: * Password: * Domain:		ddsds eXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	•	3	2			Ð		
ep 4: Click	ck	Ok	to I	₋ogin.			4			



#### D2 Workspace Overview

Description of the Top Navigation D2 Workspace banner





#### New

Content... - *This Feature is disabled.* Cabinet... - *This Feature is disabled.* 

Advanced Search - Options to refine search by location, object type, properties, date, and size



#### Import

File... - Import a document from a local PC or network file system.

View
Edit
Export
Print
Check in
Checkout
Cancel Checkout
Delete Del
Permissions
Properties

#### Content

View... - open document in it's native application.

Edit... - Check out and open a document in it's native application.

Export... - Copy a document to a location outside of D2.

Print... - Open a document for printing.

Check in... - Check in a revised version of an existing document in D2.

Checkout... - Locks the document to prevent other authors' revisions. A version that is checked out will not be published. The EFFECTIVE version will continue to be published

until the modified version is checked in.

Cancel Checkout... - Unlocks document. All changes will be lost. Properties... - view document attribute values.

#### CURRENT VERSION V

#### **Current Version/All Versions**

The dropdown allows the user to toggle between showing the current versions only or showing all versions in the Content List. Widget *Note: Only the version that has EFFECTIVE or CURRENT EFFECTIVE is the published version of a document.* 

#### **Right-side Menu Items**



#### 1. Pin or Unpin the Navigation bar

Click this icon to hide the Navigation bar. Hover or glide over the hidden area to view the navigation bar and while it is displayed, click on the icon again to re-pin it.

#### 2. Search

Create and configure an advanced search. (Details in a later section)

#### 3. D2 Help

Click the help icon to access D2 help information.



#### 4. User settings

Options to change General, Navigation, and Events properties. Allows the user to configure paths to temporary files, options to customize date formats, menu position and default language settings

### General Tab

FIELD	DESCRIPTION
Temporary path	Select the directory in which to save viewed files. Viewed files are not checked out. The system deletes files the next time you log in to the system.
Checkout path	Select the directory in which to save checked out files.
Date format	Select the date format used for content properties.
Date and time format	Select the date and time format used for widget columns.
Default language	Select the default language for the D2 Client user interface. This overrides the web browser language setting. Your system may be configured to hide this field.
Restore session	Restore Session is checked by default, to restore previous workspace and widget settings.

#### User Interface Tab:

FIELD	DESCRIPTION
Content by page	Select the number of items you want to show in each page of a list.
Table row height	Select the height of a row in a list.
Menu position	Select to position the menu at the left or top of the position. Log out and log in to see the change.
Menu width	When Menu position is set to Left, this option appears. Type your desired menu width in pixels with a minimum of 160.

#### **D2 Workspace Introduction**



The D2 main screen displays a primary Workspace gallery.

#### **Content List:**

- Displays subfolders and files in the folder.
- Enables full browsing and content-seeking capabilities.
- ✓ Displays results from advanced search, text search, and predefined search widgets.
- ✓ Contains "bread crumb" info allowing the user to traverse or jump up to a location higher in the current path.

#### 2a Properties tab:

✓ Displays properties of selected object (e.g. document, folder, and cabinet).

#### Locations tab:

Displays directory locations in which selected object is found.

#### Versions tab:

✓ Displays list of versions of the selected document.

#### Renditions tab:

✓ Displays list of PDF renditions of the selected document.

#### D2 Workspaces / Widgets descriptions (continued)

					*
Text Search ▼					
Enter your search terms					
4 🕵 Searches	Text Search 🔻				
My last search	Enter your search te	rms			P 🔎
My searches		2 🔮	Searche		
Public searches					
		-4a - Fa	vorites		
Favorites			E Viewer		
PDF Viewer			or viewei		
Attribute Search		AC At	tribute Sea	Irch	

#### 3 Text Search:

- ✓ Enables viewing, editing, and running a basic *text search* with options to *save* the search.
- $\checkmark$  Options for Advanced Search  $\checkmark$  and  $\checkmark$  Highlight off/on.

#### 4a) Favorites:

✓ Displays list of documents and/ or folders marked as favorites.

#### b) PDF Viewer:

✓ Generates a PDF view of selected document version within the PDF Viewer panel. This requires either that the document was originally a PDF or that a PDF rendition has been created in Documentum for the document. Of non-PDF documents, PDF renditions are created only for MS Office documents. If a PDF is not found, a message is displayed in the PDF viewer panel indicating that a PDF rendition was not found for the selected document or version.

#### 4c) Attribute Search:

 Enables searching options on specific set of attributes such as by: document ID, file name, audience type, document, published or expiration date, and date start and end range.

#### d Repository Browser:

- ✓ Simplest and preferred method to expand the folder tree. List of documents for the selected folder will be displayed in the Content list panel.
- ✓ Displays folders of repository and folder location of selected document.

#### Assigning Working Folders

**Step 1** –.Click the "User settings" to open 'Options" screen to enter the *folders* where your downloaded documents will be stored .

🛢 IDDSDS	上 user (user) 🔻 🚯	
	User settings	*
	Logout 1	۹



Documentum requires a local *working* folder to store documents during the import process. A local folder is also required to store documents that are being modified by the user.

General User Interfa	ice Events	
Temporary path:		
Checkout path:		×
Update Browser Plugin:	None	~
Current Browser Plugin	None	
Date format:*	April 14, 2021	~
Date and time format:*	Apr 14, 2021, 10:40:05 AM	~
Date input format:*	04/14/2021	~
Default language:		~
Default Workspaces:		•••
		×
		$\sim$

#### Step 2 – In the General tab,

Select to browse to the Temporary path location to export documents.

Select to *browse* to the *Checkout path* location where *checked out* documents are stored.



The *Temporary Path* is the *default* location for *exported documents*—but this can be changed during the export process.

The *Checkout Path* is the location where *checked-out documents* are stored. The *Temporary and Checkout Paths* can be the same folder. Both paths should be in folders that are being backed up.

#### Step 2 – Choose desired folder.



The first time the Select Folder button is clicked the user is allowed to browse to a folder, the second time it is clicked it actually selects the folder and the workflow continues.

Step 3 – Click the *Select folder* button to continue.

🛓 Choose fol	der					X
Look in :	🕕 Documentu	m		•	🔹 🤌 📂 🛄 -	
Recent Items	🗼 images		2		D2	
Desktop						
My Docum					Choose the for where your ch out content w be downloaded	older hecked will d for
Computer					this reposito	ory.
	Folder name :	C:\Users\e485314	\Desktop\Documentum		Select	folder
Network	Files of type :	All Files			▼ Car	ncel

The Options window/ General tab shows the selected path for both \* required fields.

**Step 4** – Click the **ox** button to *Save* the *local folder* selections.

#### **Importing New Content**

#### Import NEW Document

This section explains how to import an existing document into D2 from an external source such as the personal folders.



Users' folder access are based on their security and accounts.

The user must be in *their Content List folder* (shown below) to import new documents.

**Step 1** – In the *Content List, double-click* on the Electron County cabinet icon and navigate to the folder where to import the new document.

SDS Workspa	ce ▼ +
Content List 🔻	
🗄 iddsds (ISD IDDTest	ID55 (IDDTestID55))
Name 🗸 Publishing	Title
📄 LA County 🔶	SDS LA County Cab

**Step 2** – *Double-click* to *open* all applicable folders. Continue to open folders until the desired folder is opened.

Use the Repository Browser as an alternative to quickly expand and locate the desired folder.

				▼ ALL VE
SDS Workspace ▼ +				_
Content List ▼	Animal Care		Text Search Favorites	- 3
Name ▲ 1000194_Test_Idd14_av.docx (1.0)	Title Test ID14 AV	Version Label 1 1.0 2	PDF Viewer Attribute Search	્ર
1000194_Test_Idd14_av.docx (1.1) 1000196_Testdoc1.docx (1.0)	Test ID14 AV	1.1, CURRENT, EFFECTIVE 2 1.0, CURRENT, EFFECTIVE 2	Repository Browser     ▼       26 /     ▲ I iddsds (ISD IDDTestID12 (IDDTestID12))	
■ 1000199_Testdoc2.docx (1.0)  1000201_Test_No_4_IDD12-AV.docx (1.0)	Test Doc 2 IDD12 Test no 4 idd12av	1.0, CURRENT 2 1.0, CURRENT, EFFECTIVE 2	26 , A County	(
1000203_Testdoc5.docx (1.0)           1000241_Test_New_Content_IDDTestID12_4-27-16_a	Test No 5 IDD12 AV Test New Content IDDTestID12av	1.0, CURRENT, EFFECTIVE 2 1.0 2	Board Correspondence	- (
☑] 1000241 Test New Content IDDTestID12 4-27-16 a <	Test New Content IDDTestID12av	1.1, CURRENT, EFFECTIVE 2	27 / P → Home P → TransExcep Publishing	$\rightarrow$

**Step 3** – *Click* the Import > File... from the drop-down menu.



The Import File dialog box will appear.

*Click* the Import > File... in the drop-down menu. If you do not see the "File" then you probably do not have *write* permission to the folder.

**Step 4** – *Click* the *initial* button to select the local folder where the original file is stored.

Select files	Files to import. •	0.0
Fill creation profile		23
Edit properties		
Linked document		
Edit content	Charles benefit	
Churck in	Selected her format.	*

Step 5 – Choose the file(s) to import. The user has the option to select one or multiple documents to import all at one time.

Hold the Ctrl button to highlight multiple documents.

**Step 6** – *Click* the *Select files* button to continue to *import files*.



The files selected will appear in import list (as shown below).

Step 7 – Select the checkbox

Apply same properties to remaining files

if properties (Title, Author, etc.)

are the same for each file selected.

Import File					
Select files Fill creation profile Edit properties (1-3/3)	File selection:	1000487_DocumentumD 1000961_000635_draftg o remaining files	2Traininglatest.docx; 1000635_4Ne iide.docx	wDPSS_draftguidenew.docx;	
	7				
tep 8 – Click the	b	utton to continue.	Horts	8)	1
			Next >	Cancel	
mport File Ed	it Properties V	Vindow			

"Some users may see a different screen format than is shown here – more or fewer fields may be available. The fields you see are specific to your security access and the document type associated with the folder.

Depending on your security configuration or the type of documents you are working with, the selections shown here may be different from those in the image below.

Enter information for all \* required fields.

**Step 9 a –** Title: (\*required) - Enter a Title.

**Step 9 b** – Authors (\**required*) - Click the  $\oplus$  icon to add an Author(*s*) names. We suggest to enter author's first and last name or employee numbers to keep the usage consistent.

Import File		
Select files	File selection:	Best Practices on Accessibility Guidelines (2).docx; Best Practices on Accessibility G
Fill creation profile	Title:*	
Edit properties (1/3)	Subject:	$\bigcirc$
Linked document	Authors: *	
Edit content		

Step 9c – Audience Type: (\*required) - Click the ≥ button, to select the options All or the Intranet settings. The Audience Type field is populated by a default value based on the normal publishing location(s) for the folder. In some folders, users can change this value.

Enter the information in the following for *all (optional)* fields.

- Step 9d Document Date: (optional) The document date is set by default to current date. Click the <sup>[1]</sup> icon to select desired document date.
- Step 9e Publish Date: (optional) The Publish date is set by default to current date. Click the icon to select desired Publish Date and Publish Hour. If the Publish Date is not changed, it will be published during the next publishing cycle (within 15 minutes). If you want the document to be published in the future, enter a future date and/or future hour.
- **Step 9f** *Expiration Date and Hour: (optional)* Click the <sup>[]</sup> icon to *select* desired *Expire Date* and *Expire Hour.* By default, the document will never expire. To stop a document from publishing, enter the current (or past) date/hour in the Expiration fields.

If an Expiration hour is selected, an Expiration Date <u>MUST</u> also be selected for the system to expire the document.

Audience Type: *	Internet	▼ <mark>9</mark> C
Document Date:	20 Aug 2015	9d
Publish Date:	21 Aug 2015	
Publish Hour:	Select Hour	▼
Expiration Date:	22 Aug 2015	× 🔤 🛶 Of
Expiration Hour:	Select Hour	· · · · ·

Step 9g – (optional) Select the "Request Email" Request Email:

Checkbox.

*"Request Email"* checkbox triggers a notification email to be sent back to you when the document has successfully published. The notification will include the native and rendition published URLs as well as Documentum internal URLs.

Request Email:

- (9g )

Page 15 | 44

Step 10 – Click the Next > button to continue.

The imported files are added to the Content List. The Properties tab shows the attributes of the documents imported.

SDS Works	pace 4 ¥ +					
Content List 🔻						Test Search
466-0 (50 (00Te	at017 (00Test017) > ELACounty	Arts Comm > imitianed Correspondence				Favorites
iame -		Title .	Version Label	Hodfied	Holfed By	PDF Viewer
1000409_New	CoorContant.pdf (3.1)	New Dock Contant - look for attributes	3.0. CURRENT, EFFECTIVE	7 Apr 2015 14:25:56	150 100 🔥	All take Search
S socienti, rend	butsTest-doox (1.4)	Look for correct attributes	1.0. CURRENT, EFFECTIVE	23 Apr 2015 18-33-33	84,80	Repository Browser V
1000490_1000	WG_AthloutsTeet.pdf (1.1)	don't fail me now	1.6. CURRENT, EPPECTIVE	23 Apr 2015 18:33-34	84,40	<ul> <li>Bideds (SD CO1eet017 (CO1eet017))</li> </ul>
1000401_Test	WithChut.doox (1.0)	workd	LO, CURRENT, BPECTIVE	23 Apr 2015 18-33-34	84,40	AAA DAN DAN TERTO
1000492_heath	withchet2.doox (1.0)	suffightfolio	1.0. CURRENT, EFFECTIVE	23 Apr 2015 18-33-36	84,40	AAA CAN CORT THET
\$1000506_00pt	edRooperSQLportsH03.pdf (1.1)	Publishing test	1.0. CURRENT, EFFECTIVE	15 Mar 2006 10:54:23	84,401	# Arta Comm
		WWW.autility and an and a second second	1.0. CURRENT	8 34 2016 11 27/09	250 200	
state	H87_DocumentumCChrannightest.d	the state of the party				# Board Correspondence
1 2010/02_5000	ND_DocenturCChanegatet.4_ XXL_Nex-CVSL_birkgaldenex-doc_ NL_XXXXL_Nex-CVSL_birkgald	ID0Tet0017_sampledoc ID0Tet0017_sampledoc	LA CARENT	8 Jul 2016 13-27-36 8 Jul 2016 13-27-32	150 ED0 150 ED0 >	Board Consequence     Board Consequence     Difference     Difference     Difference     Difference     Difference
<pre>#] 1000820_0000 #] 1000820_0000 #] 1000820_0000 </pre>	MC_DocumenturiCCT energiated.d XXI_MexCPSI_deshadenex.doc XXI_XXII_MexCPSI_deshad Localizes Yestees	ECTestO(2_samplede ECTestO(2_samplede ECTestO(2_samplede	LO, CURRENT	8 34 2014 13-27-35 8 34 2014 13-27-32	150 100 180 100 >	Breat Consepondence     Convesion Publications     Generation     System
1000820_0000     1000821_0000     1000821_0000     10008021_0000     10008021_0000     10008021_0000     10008021_0000     10008021_0000     10008021_0000     10008021_0000     10008021_0000	Konsenturi Championes de      Konsenturi Championes de      Konsenturi Consenturi de      Konsenturi de	Contradio 17, service of Contradio 17, service	LA, CURRENT LA, CURRENT	8 34 2016 13-27-16 8 34 2016 13-27-12	NO NO	Beat Envergendence     Dear Convesion Publications     Dear Publications     Dear Publications     Dear Publications     Dear Publications
societies af 10     Name	200         Disconcenture CCT management al           201         Disconcenture CCT management al <td>ECCRedD12_services ECCRedD12_services ECCREDD2_services EccsSites 1_http://www.eccs</td> <td>LA. CUMBAT</td> <td>8 34 2014 13:27:18 8 34 2014 13:27:22</td> <td></td> <td>Beart Commandence     Beart Commandence     Beart Commandence Publications     Beart Commandence Publications     Beart Commandence Publications     Beart Commandence Publications     Beart Commandence Publications</td>	ECCRedD12_services ECCRedD12_services ECCREDD2_services EccsSites 1_http://www.eccs	LA. CUMBAT	8 34 2014 13:27:18 8 34 2014 13:27:22		Beart Commandence     Beart Commandence     Beart Commandence Publications
social control and a soci	MC (Records) (Change) (Bell) (A. Caracteria (Change) (Bell) (A. Caracteria (Change) (Bell) (A. Caracteria (Change) (Bell) (A. Caracteria (Change) (Bell) (B. Caracteria (Bell)) (B. Cara	ECTedD17,serplede ECTedD17,serplede ECTedD17,serplede Eccellenes destligede don	LA, CURRAT	8 34 2006 10:07:08 8 34 2006 10:07:02		Beart Eurospondence     B
1000020_000     100002_000     100002_000     100002_000     C      Topperties of 10 Name Tite Document Date	MOL (ReconstructionsChroning global)     MOL (Reconstructions)     Molecular (March (Mar	Contrado (C., Sanglador EDDTado (C., Sanglador EDDTado (C., Sanglador Resultations Antalguido docs 195, Jostgado docs	LA CUMPAT LA CUMPAT	8 Jul 2016 13-27-06 8 Jul 2016 13-27-02		Beart Commandence     Port Commandence     Port Commandence Publications     Port Public Publications     Port Public Publi
1000020_000     100002_000     100002_000     100002_000      100002_000	NOT (ReconstructionsChannel gebook)     Not, Reconstructions (Respectements)     Incufferes     Versions     Incufferes     Versions     Versio	ECCTedD17_serglede ECCTedD17_ser	LA. CUMBERT	8 34 2006 18-27-36 8 34 2006 18-27-32		Beat Conversion Publication     Dear Conversion Publication     Dear Dear Dear Dear Dear Dear Dear D
accellate, poor     accellate, poor     accellate, poor     control, poor     c	MC _ Records and Provide and American Ame American American A	ECCTedD17_serglede ECCTedD17_serglede ECCTedD17_serglede Eccadienes A_drafiguide docs 752_04gate.docs	LA. CUMBET	8 34 2006 18-27-06 8 34 2006 18-27-02	100 TEO 100 TEO >	Beart Conversion Publications
docatory soon     control soon	NO. (Notice Provided and Constrained an	ECCTedD12_services ECCTedD12_services ECCTedD12_services Resolutions	LA COMPATI LA COMPANY	9 34 2016 19-27-16 9 34 2016 19-27-22		Beart Commandence     Beart Commandence     Beart Commandence Publications     Be
docator, poor     occator, poor     occator, poor     occator, poor     con     con     occator, poor     con     con	No. (Recommended Conservation Conservation)         No. (Recommended Conservation)           Localizers         Versions           Localizers         Versions           NOLE2, 1000011, N000015, Alteración 31         NOLE2, 1000011, N000015, Alteración 31           NOLE2, 1000011, N000015, Alteración 31         NOLE2, 100011, N00015, Alteración 31           NOLE2, 1000011, N000011, Alteración 31         NOLE2, 100011, N00011, Alteración 31           NOLE2, 1000011, N000011, N00011, Alteración 31         NOLE2, 100011, N00011, Alteración 31           NOLE2, 1000011, N00011, Alteración 31         NOLE2, 100011, N00011, Alteración 31           NOLE2, 100011, N00011, Alteración 31         NOLE2, 100011, N00011, Alteración 31           NOLE2, 100011, N00011, N00011, Alteración 31         NOLE2, 100011, N00011, N00	COTRADO C, samplador EDETadO C, samplador EDETadO C, samplador Resultations Adrafigado doce 1931, drafigado doce	LA. CUMPLY LA, CUMPLY	8 34 2016 13-27-16 8 34 2016 13-07-52		Beart Commandence     Portuge Publications     Deart Commandence Publications     Dearters     Dearters     Dearters

#### "Congratulations, you have successfully imported a document into D2."

The imported files, for example, are shown below in the Content List with the Current Effective version label. The "EFFECTIVE" label means that the file version is published and ready for viewing.

	CONTENT V			
SDS Workspace 4 V +				
Content List 🔻				
(IDDTestID17 (IDDTestID17)) > □ LA County	> 🫄 Arts Comm 🔹 🎾 Board Correspondence			
Name	Title	Version Label	Modified .	Modified By
1000445_AttributeTest.docx (1.0)	Look for correct attributes	1.0, CURRENT, EFFECTIVE	23 Apr 2015 18:33:33	svc_ecm
1000490_1000445_AttributeTest.pdf (1.0)	don't fail me now	1.0, CURRENT, EFFECTIVE	23 Apr 2015 18:33:36	svc_ecm
1000491_TestWithChet.docx (1.0)	work!	1.0, CURRENT, EFFECTIVE	23 Apr 2015 18:33:36	svc_ecm
1000492_testwithchet2.docx (1.0)	sdfghjkl:	1.0, CURRENT, EFFECTIVE	23 Apr 2015 18:33:36	svc_ecm
1000437_SubmittingCBIRequestsViaChenvell.doc (	Word version here	1.1, CURRENT, EFFECTIVE	12 May 2015 13:11:48	svc_ecm
1000506_10penSRtoopenSQLports8433.pdf (1.0)	Publishing test	1.0, CURRENT, EFFECTIVE	15 Mar 2016 10:54:23	svc_ecm
2 1010820_1000487_DocumentumD2Traininglatest.d	IDDTestID17_sampledoc	1.0, CURRENT, EFFECTIVE	8 Jul 2016 11:48:13	svc_ecm
1010821_1000635_4NewDPSS_draftguidenew.doc_	IDDTestID17_sampledoc	1.0, CURRENT, EFFECTIVE	8 Jul 2016 11:48:13	svc_ecm
	IDDTestID17_sampledoc	1.0, CURRENT, EFFECTIVE	8 Jul 2016 11:48:13	svc_ecm
<				>

Since this is the IMPORT process, the version label will initially have the \_NEW\_ version label. Once it is processed it will be given either "CURRENT," which is the latest version of the file, and "EFFECTIVE," which shows that the file has been published.

#### Edit Existing Document

For documents in D2, the user can *check out* the document and retain exclusive use for editing purposes. While the document is checked out, no one else can edit, check-out, or check-in the document. A *lock icon* will appear to the left of the file name in the *Content List* widget.



**Step 1** – In the *Content List window, double-click* on the EA County cabinet icon and navigate to the departments' content folder.

D2 + NEW	
SDS Workspace	24▼ +
Content List ▼ iddsds (ISD IDDTestID	25.0D0Test0026))
Name 🗸	1 Title
🔤 System	System Admin Cabinet
E LA County	SDS LA County Cabinet

**Step 2** – *Double-click to open* all necessary folders. Continue to open folders until the document is located.

	CONTENT V
SDS Workspace 4 ▼ +	
Content List 🔻	
⊞ iddsds (ISD IDDTestID17 (IDDTestID17)) >	unty > 🧰 Arts Comm
Name	Title Version Label
Home 2	Arts Commission
Commission Publications	Arts Commission
🗀 Board Correspondence 📕	Arts Commission

**Step 3** – In the Content List window, highlight the file to edit.

**Step 4** – *Click* the *Content* > *Checkout...* in the drop-down menu.



Selecting Checkout does not open the document in the native application—it only locks it and places a copy in the checkout folder.

When editing a document, D2 locks the document until the user *either checks the document back into the D2 repository* or "cancels checkout." If cancel check-out is performed, all changes since the last check-in will be lost. Do not leave documents checked out *any longer* than necessary.



Admin users can "cancel checkout" regardless of who checked it out. Authors can only "cancel checkout" for documents they checked out. Authors cannot cancel checkout that has been checked out by someone else. **Step 5** – *Click* the *Content > Edit...* in the drop-down menu. D2 downloader dialog opens and the document opens in native format (i.e. MS Word,) for editing.



W

Transferring ...

button to close the native

Close **Step 6** – When finished editing the document, the file and select the application window. (MS Word is shown in this example)

MS Word document downloaded and opened

1010822\_1000961\_1000635\_4Ne=OPSS\_@wftpake.docx

CO1extD17\_serg

8 34 2016

8 AJ 2016

4:00 PM

Nakish Date Publish Hour

030822\_1000

🗐 🗖 🗧	<b>)</b> * =			Docun	nentum I	)2_7_5_16blatest	- Word		
FILE 6	DME IN	ISERT	DESIGN	PAGE LA	YOUT	REFERENCES	MAILINGS	REVIEW	VIEV
Remove Background	* Correctio	ons = ffects =	🛋 Compres 🚰 Change F 🐿 Reset Pict	s Pictures Picture ture 🔻			~		2
	1	vajust	5	,			-	Picture Style	25
-				10108	320_100048	1 7_DocumentumD2Trai	ninglate Propertie	s doc	ş ı ı

Step 7 – Highlight the locked document in the Content List Widget. Right-click and select Check in... from the drop-down menu.

D2 +∗	ew 🔻 📥 import 🔻 📘			
SDS Workspa	xe4▼ +	View Edit		
Content List V	-	Export		Text Search
I kidsds (ISD ID0TestD Name 1000491_TestW	WithChet.docx (1.0)	Check In	Version Label Mox 1.0, OURRENT, EFFECTIVE 2	Poweres PDF Viewer Attribute Search
1000492_testwi 1000437_Submit	thchet2.docx (1.0)	Delete Del	1.0, OJRRENT, EFFECTIVE 2 1.1, OJRRENT, EFFECTIVE 1	Repository Browser
1000506_1Oper 1010820_10004	nSRtoopenSQLports9433.pdf (1. 487_DocumentumD2Traininglate	Permissions	1.0, OJRRENT, EFFECTIVE 1 1.0, OJRRENT, EFFECTIVE 8	ELA County     County     County     County
1010821_10006	535_4NewOPSS_draftguidenew.d 561_1000635_4NewOPSS_draftgu	ID0TestID17_sampledoc ID0TestID17_sampledoc	1.0, CURRENT, EFFECTIVE 8 1.0, CURRENT, EFFECTIVE 1 -	AAA_DAN_ID992_TEST
(			×	Board Correspondence
Properties V	Locations Versions	Renditions		E Commission Poblications     E B Home
Properties of 1010	022_1000961_1000635_4NewDP	SS_draftguide.docx	<u>ه</u>	- El diterio
Nome:	1010622_1000961_1000635_4NewC	PSS_draffguide.docx		
TBe:	ID0TestID17_sampledoc			
Document Date:	8 Jul 2016			
Publish Date:	8 Jul 2016			

**Step 8** – The Checkin dialog box gives the option to change the document version. Select the version.

Checkin	
General Options Properties Name: 1010822_1000961_1000635_4NewDPSS_draftguide.docx Version: 1.0, CURRENT, EFFECTIVE	
Check in version as: *  1.1 2.0	Selecting (1.1) - will assign an increased decimal version number. Selecting (2.0) - will assign a whole number version. Number will increase to this new version. (This is the preferred option!)
OKCar	cel

If a new version of the same document is being checked in, skip Step 9.

**Step 9** – *(optional)* Select the *Options tab* to select a different file to upload as this new version.

**Step 9a** – Select the 🔤 to navigate to the local file that will replace the previous D2 version.

Circle Kin       Image: Sector S	Chookin					- 19	Search Document
General       Options       Options       Vertex       Vertex <th>SHECKIN</th> <th></th> <th></th> <th></th> <th></th> <th>· 🛂</th> <th>  Search Documentur</th>	SHECKIN					· 🛂	Search Documentur
Set as current version:  Set as current versio	General Options			Name A <u>1000039_Agenaa3-31-10totestPDFKeatto</u> 1000487_DocumentumD2Traininglatest	Date modified 4/4/2010 12:30 PW 9/2/2015 8:27 AM	Type Firefox HTIVIL Doc Microsoft Word D	Size 4 KB 3,790 KB
Retain lock in repository:       Image:	Set as current version:			1000557_TestdocumentD2 1000635_4NewDPSS_draftquidenew	10/1/2015 1:35 PM 8/31/2015 3:47 PM	Adobe Acrobat D Microsoft Word D	135 KB 4 747 KB
Checkin trem file:       09/2012 1183 / Microsoft Word D.       4/48 / Microsoft Word D.         Format:       09/2012 1183 / Microsoft Word D.       4/48 / Microsoft Word D.       4/48 / Microsoft Word D.         Format:       09/2012 1183 / Microsoft Word D.       4/48 / Microsoft Word D.       4/48 / Microsoft Word D.         Copy of Advancesson       09/2012 1183 / Microsoft Word D.       4/48 / Microsoft Word D.       4/48 / Microsoft Word D.         Format:       01/2012 100/2014 / Microsoft Word D.       4/48 / Microsoft Word D.       4/48 / Microsoft Word D.       4/48 / Microsoft Word D.         ep 9b - Select the       Open       button complete checking in file.       09/2012 431 / Microsoft Word D.       3/48 / Microsoft Word D. <td>Retain lock in repository:</td> <td></td> <td>9a</td> <td>1000646_1000574_CABProjectManageme</td> <td>8/11/2015 9:34 AM</td> <td>Adobe Acrobat D</td> <td>1,582 KB</td>	Retain lock in repository:		9a	1000646_1000574_CABProjectManageme	8/11/2015 9:34 AM	Adobe Acrobat D	1,582 KB
Format:       Image: Section of Market Disciplication of	Checkin from file: *			1000961_1000635_4NewDPSS_draftguide 1010822_1000961_1000635_4NewDPSS_dr	8/25/2015 11:45 AM 7/8/2016 12:27 PM	Microsoft Word D Microsoft Word D	4,748 KB 4,748 KB
ep 9b – Select the open button complete checking in file. ep 10 – Once the selected the file name and format appear, click the button to Save sion changes.	Format:		<b>*</b>	1010822_1000961_1000635_4Newdraftguide	7/12/2016 10:12 AM	Microsoft Word D Microsoft Word D	4,747 KB 243 KB
ap 9b – Select the Open button complete checking in file. ap 9b – Select the Open button complete checking in file. ap 10 – Once the selected the file name and format appear, click the OK button to Save rsion changes. Checkin form file: 1010822_1000861_1000655_4Newdraftguide docx ***				Copy of ActiveStellentUsers 06JAN2016	3/23/2016 10:24 AM	Microsoft Excel W	3,903 KB
P9b – Select the Open button complete checking in file. Pb – Select the Open button complete checking in file. Pb – Once the selected the file name and format appear, click the button to Save sion changes. Checkin Checkin Central Options Set as current version: Checkin from file: 101000555_4Newdraftguide.docx in repository: Checkin from file:				Copy of IDD UAT Test Results - 20150803 Copy of IDD UAT Test Results - ISSUESLIST	8/13/2015 4:46 PM 8/13/2015 4:57 PM	Microsoft Excel W Microsoft Excel W	1,536 KB 1,536 KB
<b>p</b> 9b – Select the Open button complete checking in file. <b>p</b> 10 – Once the selected the file name and format appear, click the button to Save sion changes. <b>heckin heckin heckin</b> <p< td=""><td></td><td></td><td></td><td>💌 🔹 Documentum D2 EileenGomez</td><td>3/14/2016 4:51 PM</td><td>Microsoft Word D</td><td>7,626 KB</td></p<>				💌 🔹 Documentum D2 EileenGomez	3/14/2016 4:51 PM	Microsoft Word D	7,626 KB
9b – Select the Open button complete checking in file. 9 10 – Once the selected the file name and format appear, click the OK button to Save on changes. Interval Options It is as current version: It is cur			635_4Newd	raftguide		•	All Files
9b – Select the     0pen   button complete checking in file.     10 – Once the selected the file name and format appear, click the     0K   button to Save on changes.   eckin     neral     Options   as current version:   Intock in repository:               Intervent the intock in repository:							Open +
beneral Options   et as current version: Image: Comparison of the state of	<b>p 10 –</b> Once t ion changes.	he selected the file name and	d format a	ppear, click the			ouve
General Options	<b>p 10</b> – Once t sion changes.	he selected the file name and	d format a	ppear, click the			Suve
Set as current version:   Retain lock in repository:   Checkin from file: *   1010822_1000961_1000635_4Newdraftguide.docx   Format: *   MS Word Document 2007 / 2010	<b>p 10</b> – Once t sion changes. :heckin	he selected the file name and	d format a	ppear, click the			
Retain lock in repository:     Intersection       Checkin from file: *     1010822_1000961_1000635_4Newdraftguide.docx       Format: *     MS Word Document 2007 / 2010	<b>ep 10</b> – Once t sion changes. <b>:heckin</b> General Options	he selected the file name and	d format a	ppear, click the			
Checkin from file: *         1010822_1000961_1000635_4Newdraftguide.docx         ••••           Format: *         MS Word Document 2007 / 2010         •	ep 10 – Once t sion changes. Checkin General Options Set as current version:	he selected the file name and	d format a	ppear, click the			
Format: * MS Word Document 2007 / 2010	ep 10 – Once t sion changes. heckin General Options Set as current version: Retain lock in repository:	he selected the file name and	d format a	ppear, click the			
	p 10 – Once t sion changes. heckin deneral Options et as current version: etain lock in repository: heckin from file: *	he selected the file name and	d format a	ppear, click the			
	ep 10 – Once t sion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: *	he selected the file name and Interview of the file name and	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	The selected the file name and Interview of the file name and	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	he selected the file name and Interview of the file name and	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	The selected the file name and Interview of the file name and	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	The selected the file name and Interview of the file name and	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	he selected the file name and 1010822_1000961_1000635_4Newdraftguide.do MS Word Document 2007 / 2010	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	The selected the file name and Interview of the file name and	d format a	ppear, click the			
	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	he selected the file name and Interview of the file name and	d format a	ppear, click the			
OK Cancel	ep 10 – Once t rsion changes. Checkin General Options Set as current version: Retain lock in repository: Checkin from file: * Format: *	The selected the file name and Interview of the file name and	d format a	ppear, click the			

Page 21 | 44

**Step 11** – The revised file is appears in the Content List with the 2.0 Current Version label.



The "CURRENT," label shows the latest of the file, and "EFFECTIVE", which shows that the file has been published. The "EFFECTIVE" label is generated during the publishing process and depending on publish/expire dates.

D2 + NEW * 🔺 AMPORT * 🗅 CONTENT * T CURRENT VERSION *	
SDS Workspace 4 🔻 🔸	
Conferent List  Conferent List  Conferent List  Conferent List  Conferent List  Conference LA County > Conference Confere	Text Search Favorites
Name Title 1000491_TestWithChet.docx (1.0) work!	Version Label Mox 1.0, OURRENT, EFFECTIVE 2 Antribute Search 1.0, OURRENT, EFFECTIVE 2 Bases from Browser V
1000437_SubmittingCBIRequestsViuChenwell.doc Word version here     1000506_10penSRtoopenSQLports9433.pdf (1.0) Publishing test     1010500_1000487_DocumentumD2Traininglatest ID0TestID17_sampledoc	1.1, CURRENT, EFFECTIVE 1 1.0, CURRENT, EFFECTIVE 1 1.0, CURRENT, EFFECTIVE 1 1.0, CURRENT, EFFECTIVE 1 1.0, CURRENT, EFFECTIVE 1
1010821_1000635_4NewOPSS_draftguidenew.d IDOTestID17_sampledoc     1010822_1000961_1000635_4NewOPSS_draftgu IDOTestID17_sampledoc	1.0, OURRENT, EFFECT
	Commission Publications

Step 12 - File showing the "CURRENT, EFFECTIVE", label is now published.



#### **Editing Document Properties**

**Step 1** – In the Content List window, highlight the file to edit.

107249_LACinvite_high.doc (1.0)	Final LAC+USC Evite	25 Mar 2015 15:59:27	svc_ecm	1.0, CL
1000640_6DPSSediting.docx	Deetestagain	4 Aug 2015 12:11:00	ISD IDDTestID26 (IDDTest	I 1.0, CU
<				>
I ■ Page 2 of 4 ▶ ▶			Displaying	51 - 100 of 17

**Step 2** – In the lower panel, in the Properties widget *click the* Edit button.

Properties <b>V</b>	Locations	Versions	Renditions	
Edit 2				
Properties of 1000	640_6DPSSediting	g.docx		
Name:	1000640_6	DPSSediting.docx		
Title:	Deetestag	ain		
Subject:				$\bigcirc$
Authors:	dtlc			

Step (3a-d) – Enter data for all required fields.\*

Properties 🔻	Locations	Versions Rer	nditions			-
Save 🔤 Cancel Ed	lit					3
Properties of 10006	40_6DPSSediting	g.docx				0
Name:*	1000640_6	SDPSSediting.docx 🔶	3a			fi
Title:*	Deetestaga	ain		<b>-(</b> 3b <b>)</b>		(r
Subject:						(1)
Authors: *	dtlc			₽	3c)	31
					Υ	0
				~		
Keywords:						Kŧ
				*		30
				w in the second		50
Miscellaneous:				~		C
				$\sim$		ar
Comments:				0	1	u
Audience Type:*	Internet				3d	30

3a) Name:\*
Option to *change* or keep previous filename.
(*no spaces or special characters*)
3b) Title:\*
Option to *change* or keep previous title.
3c) Authors:\*
Click the icon to add an Author (*s*) names.
3d) Audience Type:\*
Click the *button*, to change the default if desired.

**Step 4 -** *(optional)* By default, the *document date* is set to *current date*. Click the eiter desired *document date*.

**Step 5** – *(optional)* By default, the *Publish date* is set to *current date*. Click the is icon to *select* desired *Publish Date* and *Publish Hour*.

**Step 6** – *(optional)* Click the <sup>[1]</sup> icon to *select* desired *Expire Date* and *Expire Hour.* 

Properties <b>V</b>	Locations	Versions	Renditions	
🔄 Save 🔤 Cancel E	dit			
Miscellaneous:				^
Comments:				$\sim$
Audience Type: *	Internet			~
Document Date:	20 Aug 20	15 ┥ (4 )		
Publish Date:	21 Aug 20	15 15		•
Publish Hour:	Select Hou	ur 🖌 🔍		~
Expiration Date:	22 Aug 20	15 + 6		× 🖻
Expiration Hour:	Select Hou			~
Request Email:		7)		
Publish Attributes:	✓ ←	(8)		
Document ID:	1000635	$\mathbf{\vee}$		
Organizational Name:	BOS			
Organizational Folder:	1st District			

By default, D2 documents will publish. If the document needs to be *published* at a *later date*, *enter* a *future date* and *hour* in the *Publish date* and *hour* fields.

Step 7 – (optional) Select the "Request Email" Request Email:

Checkbox.

*"Request Email"* checkbox triggers a notification email to be sent back to you when the document has successfully published. The notification will include the native and rendition published URLs as well as Documentum internal URLs.

Request Email:

-( 7



Page 25 | 44

#### **Expire a Document**

Users can *expire* published documents to remove them from website access.



**Step 1** – In the *Content List window, double-click* on the EA County cabinet icon and navigate to the departments' content folder.



Step 2 – Double-click to open all necessary folders. Continue to open folders until the document is located.

Modified By
4:45:56 svc_ecm
4:45:35 svc_ecm
4:45:53 svc_ecm
4:45:32 svc_ecm

Step 3 – In the Content List window, highlight the file to edit.

3				
107249_LACinvite_high.doc (1.0)	Final LAC+USC Evite	25 Mar 2015 15:59:27	svc_ecm	1.0, CL
1000640_6DPSSediting.docx (1.0)	Deetestagain	4 Aug 2015 12:11:00	ISD IDDTestID26 (IDDTestI	1.0, CL 🗡
<				>
I ↓ ↓ Page 2 of 4 ▶ ▶		_	Displaying 5	- 100 of 17

**Step 4** – *Click* the *Content* > *Properties...* in the drop-down menu choice.

D2 + NEW ▼ ▲ MPORT ▼ [					
SDS Workspace 4 🔻 🔶 🔶	View Edit				
Content List V	Export				
I Make (SD IDD7exID26 (DD7exID26) > III LA Cour	Print	eict > 🛄 Listserver			
Name - 125034_Neveletter_February_2009_FinalWeb.doc	Checkout Cancel Checkout	Status	Modified 27 Mar 2015 06:21:29	Modified By swc_ecm	Version L 4.0, CL
124646_Newsletter_February_2009_Final.dox (1.0	Carnet Creckow		27 Mar 2015 08:30:28	nc_ecn	1.0, 0.
114946_NewsLetterDECEMBER2008_Final.dox (2.)	Create relation		27 Mar 2015 08:35:26	skc_ecm	2.0, Cl.
114924_NewsLetterDECEMBER2008_Final.doc (2.)	Delete Del		25 May 2015 15:59:27	skc_ecm	2.0, Cl.
114865_NewsLetterDECEM8ER2008.doc (3.0)	Permissions		25 May 2015 15:49:01	sic_ecm	3.0, Cl.
113651_NevsLetterNovember2008.doc (3.4)	Properties	008	10 Jul 2015 14:02:30	pic_(cm	3.0, CL
113648_NevsLetterNovember2008.doc (1.0)	November 2008 No. 6		10 Jul 2015 14:02:29	pic_ecm	1.0, Cl.
113624_NewsLetterNovember2008.doc (2.0)	Final Draft November	2008 4	10 3ul 2015 14:02:29	sic_ecm	2.0, Cl.
113605_NewsLetterNovember2008.doc (1.0)	2nd Draft November 2	008	10 3ul 2015 14:02:29	sic_ecm	1.0, CL
113573_NewsLetterNovember2008.doc (1.0)	Rough Draft Nov 2008		10 Jul 2015 14:02:29	pic_ecm	1.0, Cl.
107249_LACinvite_high.doc (1.0)	Final UAC+USC Exite		25 Mar 2015 15:59:27	sic_ecm	1.0, Cl.
1000640_60PS5edting.docx (1.11)	Dortestagain		4 Aug 2015 12:11:00	ISO IDOTestID26 (IDOTestI	1.0, CL ¥

**Step 5** – The Properties dialog box opens. Enter the Authors name in the field by clicking the <sup>1</sup>/<sub>1</sub> button.

**Step 6** – Click the Expire Date eigen icon to select a *past date*. In the expiration field.

**Step 7** – (optional) Select a *past time* to *expire* the document.

The document won't expire with just a time selected and no date. Expired document <u>must have</u> an expiration date. Time is optional.

Step 8 –Select the "Request email" checkbox to receive a notification.

Properties of 02	8350_PetAdoptionPrograms.doc		
Name:	028350_PetAdoptionPrograms.doc		
Title:*	Los Angeles County Pet Adoption Programs		
Subject:			~
			$\sim$
Authors: *	DTLC + K		÷
	5		23
			~
Keywords:	Adoptions		
	Adoptions		83
			$\diamond$
			~
Miscellaneous:			0
Commente			~
Commenta.			$\square$
Audience Type: *	Internet		~
Document Date:	MM/DD/YYYY		3
Publish Date:	6 Aug 2009		
Publish Hour:	Select Hour		~
Expiration Date:	16 Aug 2016		
Expiration Hour:	2:00 PM		~
Request Email:			
Publish Attributes:			
Document ID:	028350		
Organizational Name:	Animal Care		
Organizational Folder:	DACC Web		
Organizational Subfolder:			
Organizational Subsubfold	er.		
Version Label:	14.0, CURRENT, EFFECTIVE		
Published URL:	http://file.lacounty.gov/SDSInter/dacc/028350_PetAdoptionPrograms.doc		
Full Content Size:	75776		
File Extension:	doc		
Owner Name:	svcampu3	$\sim$	
Checkout Date:			
Original File Name:	Pet Adoption Programs doc		
First Publish Date:	14 Jul 2016 12:01:36		
		ОК С	ancel

**Step 9** – Click the *OK* button to save changes.

#### Published Email Overview



Currently users will only receive this notification email when the Request Email checkbox is checked during the initial import.

If the imported document is NOT a PDF, the email will contain 3 links:

- 1. Web link to the native file (.doc, .jpg, .xlsx, etc.)
- 2. Web link to the PDF rendition
- 3. Link to the native file in Documentum

If the imported document is already a PDF, the email will contain 2 links:

- 1. Web link to the native file (PDF)
- 2. Link to the native file in Documentum

There won't be a web link to the PDF rendition since the document was already a PDF. PDF renditions are not performed on PDFs.

- Figure 1 Shows Original Filename and file extension of document.
- Figure 2 Lists the File path where the original local folder where the file was found.
- Figure 3 Shows the renamed published file.
- Figure 4 Shows the published version number of the file.

#### EXAMPLE OF EMAIL

#### Los Angeles County - Shared Document System

1000659\_2ScreenShot.docx

The following document has been published:

Original File Name: 1000659\_2ScreenShot.docx File Path: /LA County/BOS/Board Meeting/SOP SDS File Name: 1000659\_2ScreenShot.docx SDS File Version: 1.0

Note: This email is for information purposes only. If you have questions concerning this email, do NOT reply to this email. No one is monitoring the <u>DO\_NOT\_REPLY@isd.lacounty.gov</u> mail box.

#### Search

#### Text Search

Perform a search using the Text Search workspace using search terms.



#### Quick Search

Quick search accepts searches, and searches for the word in Content, Object Name, Title, Keywords, and Subjects.

Step 1 - In the Quick Search widget, enter the search keyword.

		Q	
Step	<b>2</b> - Click the search button	1	to search

#### Advanced Search

Returns documents where search queries exists on: Content, Object Name, Title, Keywords, and Subject.

**Step 1 -** Navigate to Advanced Search *Search* icon.

Step 2 – Advanced Search dialog box opens, in the Criteria tab.

**Step 3** – Click the search. to add the *Content Types* for the *Search*.

Advance	ed Search	
Search name:		
Criteria	Location(s) Columns	
Types:*		000
Full text:	Property Condition Value  Containing all words	⊕ ≈,

**Step 4** – Click on the value.

**Step 5** – Click the  $\ge$  button to *add* to the *right* in the *search criteria list*.

Step 6 – Click the	OK	button to continue.
Types Filter		5
Shared Document System Docum SDS Auditor Document SDS Auditor Audit Report Docum SDS BOS Board Meeting Docume SDS BOS Commission Publication	ent nt s	SDS BOS Document
		OK Cancel

Step 7 – (optional) Under the Options section of the Advanced Search, select one or both options to perform the search:

Save as button to save search. Name search to refer to it later. **Step 8 –** (optional) Click

tep	9 – Click 📃	Run	button	to run t	he search.
Advand	ed Search				
Search nam	e:				
Criteria	Location(s) Colum	ns			
Types: *	SDS BOS Document				00
and	Property     G Document Date	Condition	Va	alue 3 Aug 2014	□ > + ×
Full text: Optio	Containing all words	Case sensitive:			
		Sav	e as Saw	e R	9 un Cance

Run

Step 9 – Click

**Step 10** – The Content List displays Search Results.

Step 11 – The Saved search is located under My searches and available to the user.



Click Public searches to show all searches saved as public.

D2 + NEW ▼ ± IMPOR	RT V 🗋 CONTENT VERSION VERSION V				05 上 user (user) 🔻 🕕
SDS Workspace 4 ▼	+				
Content List 🔻				Text Search 🔻	
Back to iddsds (ISD IDDTestID26 ()	DDTestID26))			Enter your search terms	P 🔏 🖉
Name .	Title	Status	Modified	<ul> <li>Searches</li> </ul>	
🔁 #1.pdf (1.0)	SCHOLARSHIPAPP1		23 Mar 2015	<ul> <li>A My last search</li> </ul>	
🔁 #10.pdf (1.0)	SCHOLARSHIPAPP10		23 Mar 2015	<ul> <li>My searches</li> </ul>	
🔁 #11.pdf (1.0)	SCHOLARSHIPAPP11		23 Mar 2015	🔍 testDionneSearch 🚄	
🔁 #12.pdf (1.0)	SCHOLARSHIPAPP12		23 Mar 2015	R Public searches	
🔁 #15.pdf (1.0)	SCHOLARSHIPAPP15		23 Mar 2015		
🔁 #16.pdf (1.0)	10 SCHOLARSHIPAPP16		23 Mar 2015		
🔁 #17.pdf (1.0)	SCHOLARSHIPAPP17		23 Mar 2015		
🔁 #18.pdf (1.0)	SCHOLARSHIPAPP18		23 Mar 2015		
🔁 #19.pdf (1.0)	SCHOLARSHIPAPP19		23 Mar 2015		
🔁 #2.pdf (1.0)	SCHOLARSHIPAPP2		23 Mar 2015		
🔁 #20.pdf (1.0)	SCHOLARSHIPAPP20		23 Mar 2015		
🔁 #21.pdf (1.0)	SCHOLARSHIPAPP21		23 Mar 2015		
<			>		
4 4  Page 1 of 6   > >		1	Displaying 1 - 50 of 300		

#### Drag & Drop

Drag and Drop is a shortcut to import documents into the D2 repository from your selected folder.



Users' access to folders are based on their security and accounts. Users must be in their *Content List* folder to import new documents.

**Step 1** – Press, and hold down, the button on the mouse, to "grab" to import.

Step 2 – "Drag" the document to the D2 Content List widget and "drop" the document by releasing the button.



**Step 3** – The import file window opens. The Import dialog window lists the files and the format automatically populates as shown in the example below.

Edit properties	
Linked document	
Edit content Selected file format * MS.Word Document 2007 / 2010	
Check in State and properties for all files	

#### **Edit Properties Window**

**Step (5a-c)** – Enter data for all \* required fields.

Import File		5a) Title:*
Select files Fill creation profile	File selection: This is a test dock Title:  TestdocTESTUSER26	Enter a Title.
Edit properties	Subject Authors: • DTLC	5b) Authors:*
Edit content		Click the 🔩 icon to add an Author(s)
Check in	Keywords:	names.
	Miscellaneous:	5c) Audience Type:*
	Comments:	Click the <i>button,</i> to <i>select</i> the
	Audience Type:* Internet -50	options All or the Intranet settings.

**Step 6 -** *(optional)* By default, the *document date* is set to *current date*. Click the icon to *select* desired *document date*.

**Step 7** – The Properties dialog box opens. Click the Expire Date icon to select a past date. In the expiration field.

**Step 8** – *(optional)* Select the "Request Email" checkbox.

*"Request Email"* checkbox triggers a notification email to be sent back to you when the document has successfully published.

Decument Date:		
Document Date.	20 Aug 2015 - 0	<u> </u>
Publish Date:	21 Aug 2015	•
Publish Hour:	Select Hour	~
Expiration Date:	22 Aug 2015 🔨 😗 🗙	•
Expiration Hour:	Select Hour	~
Request Email:	☑ ← 9	
Publish Attributes:		



Continue with the Importing Content Step 4 found on page 13.

#### **Best Practices**

#### Do not import documents over 500MB in size:

The system cannot properly import documents that are larger than 500MB. If the document is larger than 500MB, please break it up into documents less than 500MB.

#### Import large files after business hours:

Importing large files (between 100MB and 500MB) slow publishing response times. Be considerate of other D2 users and please schedule the importation of large files after hours if possible.

#### Import a large number of files after business hours:

Importing a large number of files (30 or more) slow publishing response times. Be considerate of other D2 users and please schedule the importation of a large number of files after hours if possible.

#### Do not password protect documents:

Some importation functions cannot performed on password protected documents. If password protection is required, contact IDD for additional discussion.

#### Use the Repository Browser to browse through folders:

Using the Repository Browser widget on the right side of the D2 "home page" can be easier and faster than using the Content List to browse. Sometimes all folders are not readily seen in the Content List (because of column sorts other than Name), but folders are always easy to see and browse from the Repository Browser.

#### **Resolving JAVA Popups**

#### First Scenario

When first logging in to D2.....

Do you want	to run this	x annlication?
Do you want	to run uns	apprication:
	Name:	EMC D2 Applet
2	Publisher:	EMC Corporation
	Location:	http://iddsdstestlb.isd.lacounty.gov:8080
This application will information at risk.	run with unrestr Run this applicat s again for apps	icted access which may put your computer and personal tion only if you trust the location and publisher above. from the publisher and location above
More Infor	mation	Run Cancel
<b>tep 1 –</b> Select de	o not show a	again
7 Do not show this ag	ain for apps from	n the publisher and location above

button to run the JAVA applet to continue through the process.

Run

Step 2 – Select the

Page 36 | 44

#### Second JAVA Scenario

When there is a warning of an Unresponsive plugin pops-up...



**Step 1** – Select the On't ask me again checkbox, then press the Continue button to proceed...

#### Third JAVA Scenario

When the JAVA Security Warning pop-up appears...



Page 37 | 44

Step 3 – Select the

<u>R</u> e	load	page	

button to reload the page and start again.

Fourth JAVA Scenario

When opening D2 in Chrome, Java error because D2 is running in Thin Client Mode.

Error loading Java
Could not load applet. Please check that a supported version of Java is installed on this machine and that Java is enabled in this browser.
The latest version of the Java JRE can be downloaded from here:
nttp://java.com/download/index.jsp
D2 is now running in thin client mode for this browser session.
ОК

**Step 1** – D2 will still work but when the user selects the gear button to set-up their local folder for downloading documents; the Temp path and Checkout path are greyed out.

<b>-</b>		
Checkout path:		
Date format: *	d MMM уууу	~
Date and time format: *	d MMM yyyy HH:mm:ss	~
Date input format: *	08/11/2016	*
Default language:		<b>~</b>
Menu position:		~

#### **Frequently Asked Questions**

- Q: Questions about Administrative Access what are the difference in role levels/capabilities??
- A: In D2, There are the following levels of access:
  - AUTHORS Normal user access Can create and expire documents in D2 Only have access to AD assigned group folders to create files. Are able to browse through (but not change) any higher level folders needed to drill down to their assigned group folders.
  - DEPARTMENT ADMINISTRATOR Everything an author can do plus delete documents.
  - SYSTEM ADMINISTRATOR ISD Everything a Department Administrator can do plus additional functions such as create folders, modify folder group memberships, establish publishing locations, etc. (Some of these functions will be reviewed after we are in production for a period of time to see if they can be handed over to individual Departments' admin groups)
- Q: How were the groups formed in D2?
- A: In D2, groups were duplicated from Active Directory group membership. Separate groups were built for SDS Documentum. Stellent was general group/account combos translated from Stellent to D2.
- Q: What is the publishing schedule of jobs in D2?
- A: By comparison, publishing in Stellent depended upon the user group's settings where some jobs run in the background constantly from every hour to some every 4 hours. D2 jobs are currently run every 5-20 minutes.
- Q: How about Runtime on Board Correspondence documents Is it still subject to a 3-hour schedule?
- A: Projects such as this, where the documents can only be accesses by using a "search" page, still need to be indexed by the Search Engine after they have been published by SDS. Before these projects can be seen there will have a corresponding lag time for this indexing which will be at regularly scheduled intervals. We expect improvements in how fast documents in these projects will be available compared to those from Stellent. The exact schedules and timing is still being determined.
- Q: What is the home folder used for?
- A: Home folder is not published so it is used for collaborating on content then moving the content to a permanent folder. To move a file to another folder, the file will need to be exported then imported back into the system.
- Q: How do I create a folder?
- A: A normal user cannot. The user must submit a Service Request (SR) to IDD. New folders require planning, configuration and testing not as easy as creating a folder in Windows Explorer.

#### Q: How do I remove a document?

- A: "Regular users" cannot delete documents. The user must submit a SR to IDD.
   (Departments can assign their own "admins" if desired.) "Regular users" can "expire" documents to remove documents from website access.
- Q: How do I download a document?
- A: Under the Content dropdown, choose Export.
- Q: How do I move documents between folders?
- A: The user cannot. The user must first Export the document; and then Import the document into the different folder.
- Q: How do I restore a previous version of a document?
- A: If you have published a newer version of document and replaced it with a new version. The user can then expire the newer version and it will revert back to the previous version (1.0) of the document.
- Q: What document types are allowed or restricted in D2?
- A: All major file types are allowed. Video file sizes *are not* restricted. While video files are supported in SDS, we do not encourage storage of many video files as there are other systems available built specifically for faster video file storage and viewing. Storing and publishing of large video files may slow down the publishing of all of the other documents in the system for both you and others.
- Q: What are the size limitations on Microsoft Office documents that are acceptable in D2? Video files are there any restrictions on file size? Streaming files??? Is there a replacement for Tekton?
- A: On any documents 500MB or larger the custom attributes will not be embedded correctly, which causes a lack of functionality for your published document.

Video files that are large will take too long to publish so we encourage optimizing the files as much as possible. Tekton will not be replaced; it is still alive and well.

- Q: Explain the difference between "Web-viewable Link" and "link to Document in Documentum"?
- A: Web-viewable link is a link to the "published" document. Link to Document in Documentum is a link to the document stored in Documentum.
- Q: Where is the "Link to the training video?"
- A: Links to all supporting are the following: Link to the <u>D2 training video</u>

Link to the <u>D2 user guide</u>

Link to the <u>D2 Test environment</u>

## Q: Will the current content be moved from Stellent to D2? If so will the URL's be the same and what is Departments' role in the migration process?

A: The IIS redirect to the existing URL filters to a new D2 URL and a new document name is created through this process. Every file will be migrated over to the new D2 system. Department's role is to become familiar with the process and the D2 system.

Currently, in D2, as soon as the user imports a file it will be instantly published within the hour. So it is important for the user to look for these

- 1. Remembering to look for the CURRENT, EFFECTIVE label after importing.
- 2. Check the email notification box to receive an email after the publishing process is complete.
- 3. Check versions of file.
- 4. See published URL from email and copy/paste URL in browser to check published document.
- 5. Depending on document type will affect publishing time:
  - A *Word* file will take longer to import than importing a native *pdf* file because D2 has to render a pdf file for the original Word document.
- Q: When our files are migrated to Documentum, will all of the existing path names be changing to the new format? Will there be an automatic conversion process to change all the names?
- A: Yes, all of the document URLs will be changed. However, all old URLs will be automatically redirected to the new URLs. You do not need to modify any links.
- Q: Can we forward the D2 guide and video to our Business user? Who do we contact with user access problems in D2? Who should I email if I have any questions about D2 or Stellent application?
- A: Encourage your business user to test content validation.
   ISD will provide a quick response to any questions through SDS Support email: sdssupport@isd.lacounty.gov.

#### APPENDIX

#### Documentum D2 Customer Support Process Flow

- 1. Department user encounters the following problems:
  - a) Can't open a document
  - b) Can't save a document
  - c) Can't open D2
    - ✓ Password issue
    - ✓ Java issue
    - ✓ Other connection issues
  - d) Notification not received
  - e) URL does not work
  - f) Document does not publish
  - g) Document does not expire
- 2. Department user will contact their department administrator.
  - a. Department administrator will investigate issue, will review previously documented problems and questions, and will attempt to resolve the issue.
  - *b.* If the department administrator is unable to resolve the problem, the department administrator will open an Incident ticket with the *Customer Assistance Center (CAC) (562-940-3305)*.
- CAC will obtain pertinent information from the department administrator, evaluate the problem, its cause, and next course of action, and update the ticket with a detailed description of the problem including scope, time of occurrence, customer contact information and urgency.
  - a. If CAC is able to resolve the problem, they will update the ticket with a detailed description of actions taken to resolve the problem, obtain customer confirmation that the problem has been solved, then close the ticket.

#### Documentum D2 Customer Support Process Flow Diagram

## Documentum D2 **Customer Support Process Diagram** Department Department users users Department Department Admin(s) Admin(s) Customer Assistance Center (CAC) ISD/IDD Support Technicians/ Admins ISD/MCD Support EMC Technicians

Technical Support

- 4. CAC will obtain pertinent information from the department administrator, evaluate the problem, its cause, and next course of action, and update the ticket with a detailed description of the problem—including scope, time of occurrence, customer contact information and urgency.
  - b. If CAC is able to resolve the problem, they will update the ticket with a detailed description of actions taken to resolve the problem, obtain customer confirmation that the problem has been solved, then close the ticket.
  - c. If CAC support staff is unable to resolve the issue, they will route the ticket to ISD/IDD Documentum Shared Documentum System SDS / D2 support for further action.
- 5. IDD SDS support technicians/admins evaluate the problem, cause, and next course of action.
  - a. If the cause is determined to be located in the Documentum Shared Infrastructure (basically, that one or more components are down, offline, or misbehaving) then they will update the ticket with detailed findings and reroute it to MCD Applications support
    - MCD will attempt to resolve the issue, and if successful, will update the ticket with a detailed description of the steps taken to resolve the problem and reroute it back to IDD SDS for further handling and closure.
    - ✓ If MCD is unable to resolve the problem they will open a case with EMC and work with EMC support until the infrastructure/platform problem is solved and once solved, they will update the ticket with a detailed description of the steps taken to resolve the problem and reroute it back to IDD SDS for further handling and closure.
  - b. Otherwise, If the cause is related to desktop issues, UI issues, publishing issues, or other customizations
    - ✓ IDD SDS will attempt to resolve the issue, and if successful, will update the ticket with a detailed description of the steps taken to resolve the problem, obtain customer confirmation that the problem has been solved, then close the ticket.
    - ✓ If IDD SDS is unable to resolve the problem they will open a case with EMC and work with EMC support until the problem is solved and once solved, they will update the ticket with a detailed description of the steps taken to resolve the problem, obtain customer confirmation that the problem has been solved, then close the ticket.

Note: As needed, IDD support technicians/admins may contact the department user and/or department admin for additional information or for progress/status, and may contact MCD Application Support or other resources for assistance. The customer will be kept informed throughout the investigation and will be notified when the problem is solved. The customer will likely be asked to verify that the problem has been fixed.