

Documentum D2



User Manual



Version 11.0

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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:
testing environment: <http://sdstest.lacounty.gov/D2>
production environment: <http://sds.lacounty.gov/D2/>

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!

D2 Authentication

Repository: • iddsds

Login: • eXXXXXXXX

Password: •

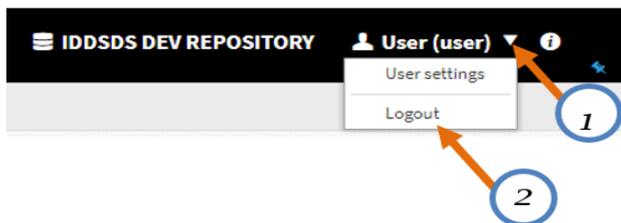
Domain:

Ok

Step 4: Click **Ok** to Login.

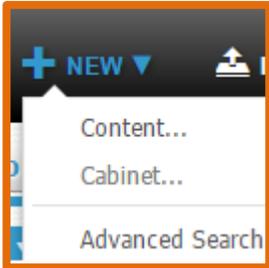
How to Log out

Step 1: Within the *D2 window*, navigate to the *Logout button* on the top right corner.



D2 Workspace Overview

Description of the Top Navigation D2 Workspace banner

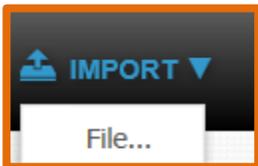


New

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

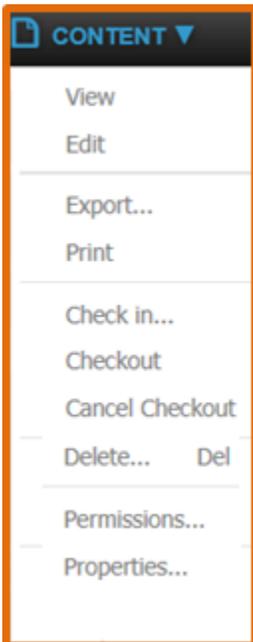
Cabinet... - *This Feature is disabled.*

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.



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.

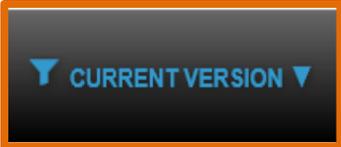
Checkout... - Locks the document to prevent other authors' revisions.

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.

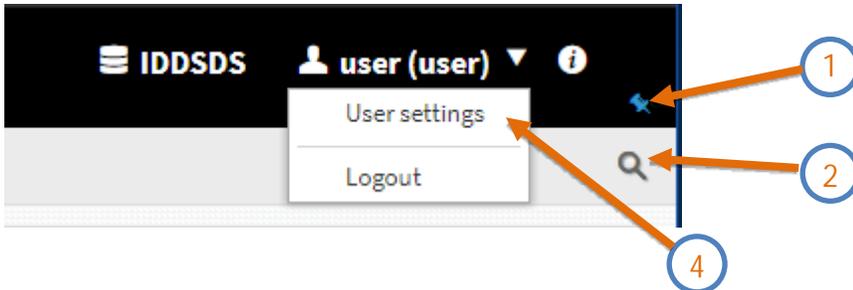


Current Version/All Versions

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

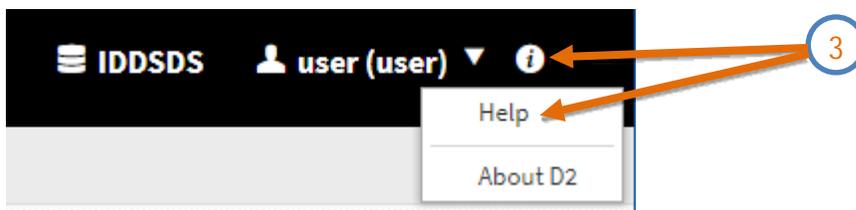
Click this icon to hide the Navigation bar. Hover or glide over the hidden area to view the navigation bar and while it is displayed, click on the icon again to re-pin it.

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

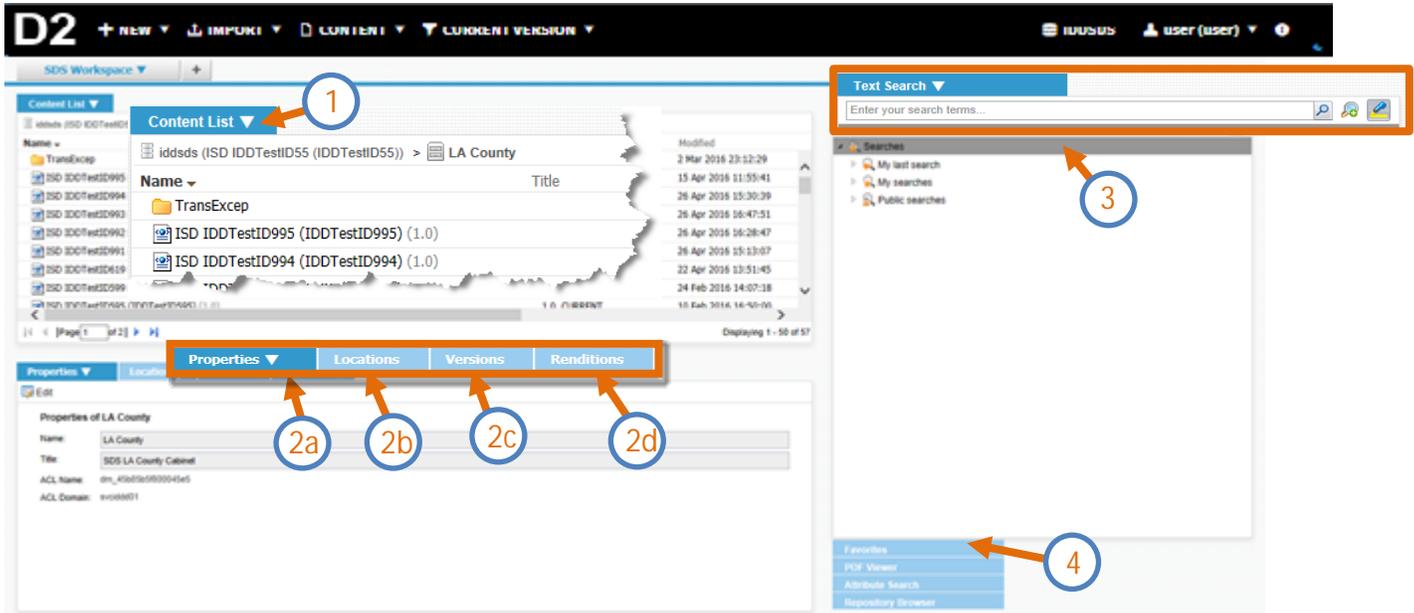
FIELD	DESCRIPTION
Temporary path	Select the directory in which to save viewed files. Viewed files are not checked out. The system deletes files the next time you log in to the system.
Checkout path	Select the directory in which to save checked out files.
Date format	Select the date format used for content 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.



1 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).

2b Locations tab:

- ✓ Displays directory locations in which selected object is found.

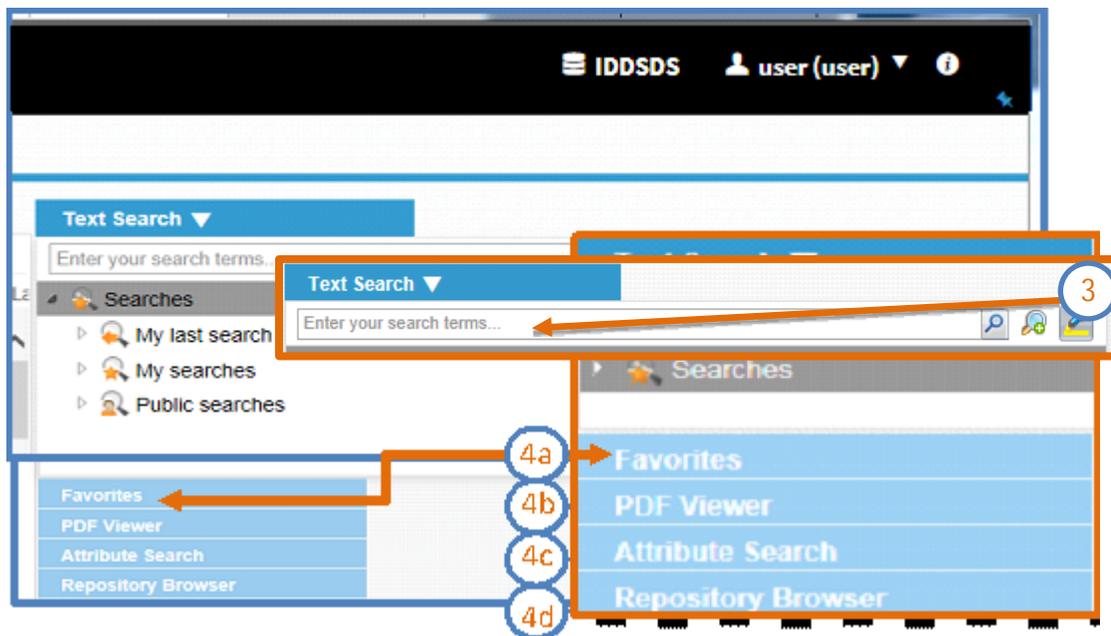
2c Versions tab:

- ✓ Displays list of versions of the selected document.

2d Renditions tab:

- ✓ Displays list of PDF renditions of the selected document.

D2 Workspaces / Widgets descriptions (continued)



3 Text Search:

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

4a Favorites:

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

4b 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:

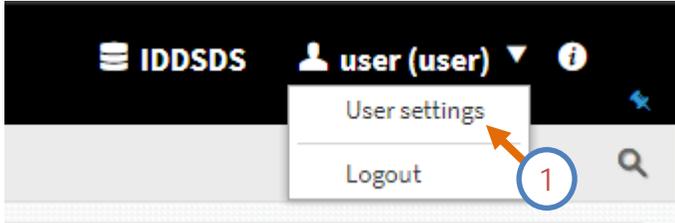
- ✓ Enables searching options on specific set of attributes such as by: document ID, file name, audience type, document, published or expiration date, and date start and end range.

4d Repository Browser:

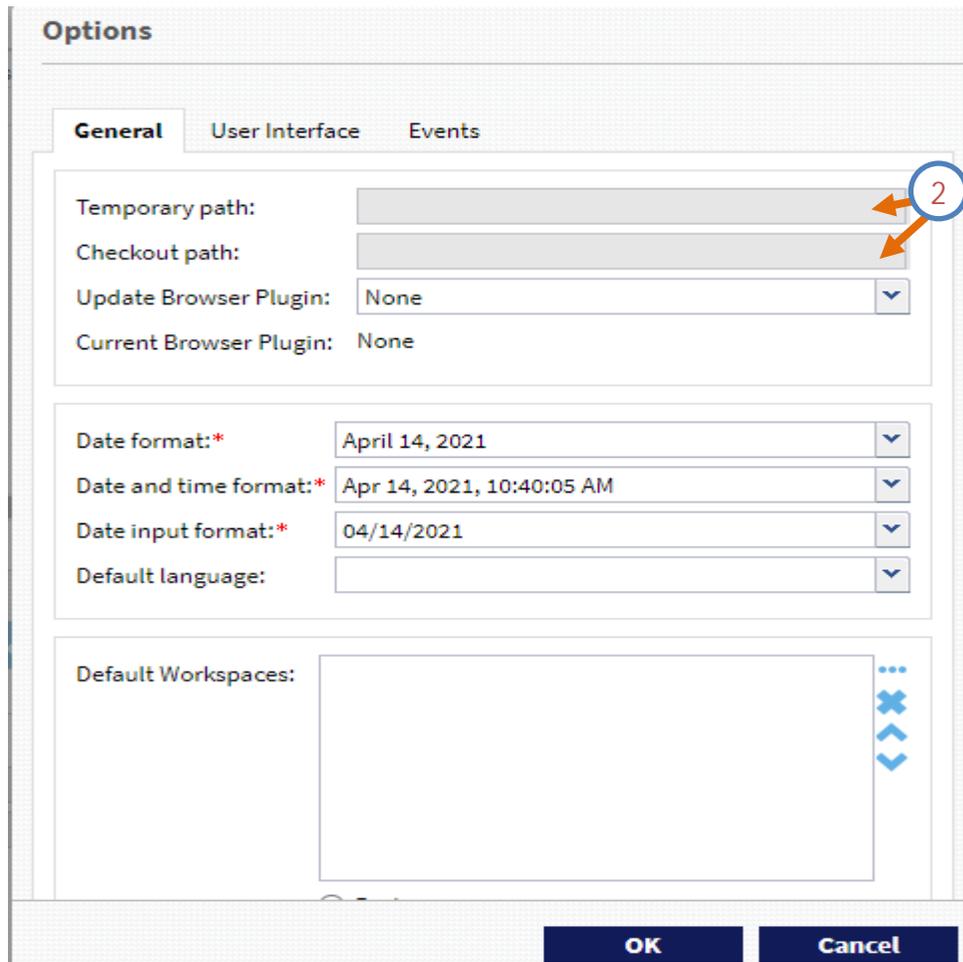
- ✓ Simplest *and preferred* method to expand the folder tree. List of documents for the selected folder will be displayed in the Content list panel.
- ✓ Displays folders of repository and folder location of selected document.

Assigning Working Folders

Step 1 – Click the “User settings” to open ‘Options’ screen to enter the *folders* where your downloaded documents will be stored .



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.

A screenshot of the 'Options' dialog box in the application. The 'General' tab is selected. The dialog has three tabs: 'General', 'User Interface', and 'Events'. Under the 'General' tab, there are several fields: 'Temporary path:' and 'Checkout path:' are empty text boxes; 'Update Browser Plugin:' is a dropdown menu set to 'None'; 'Current Browser Plugin:' is 'None'. Below these are 'Date format:*' (set to 'April 14, 2021'), 'Date and time format:*' (set to 'Apr 14, 2021, 10:40:05 AM'), 'Date input format:*' (set to '04/14/2021'), and 'Default language:' (empty). At the bottom, there is a 'Default Workspaces:' section with a list box and three blue arrows (up, down, and refresh). At the very bottom of the dialog are 'OK' and 'Cancel' buttons. A red circle with the number '2' is drawn around the 'Temporary path:' field, with an orange arrow pointing to it.

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.

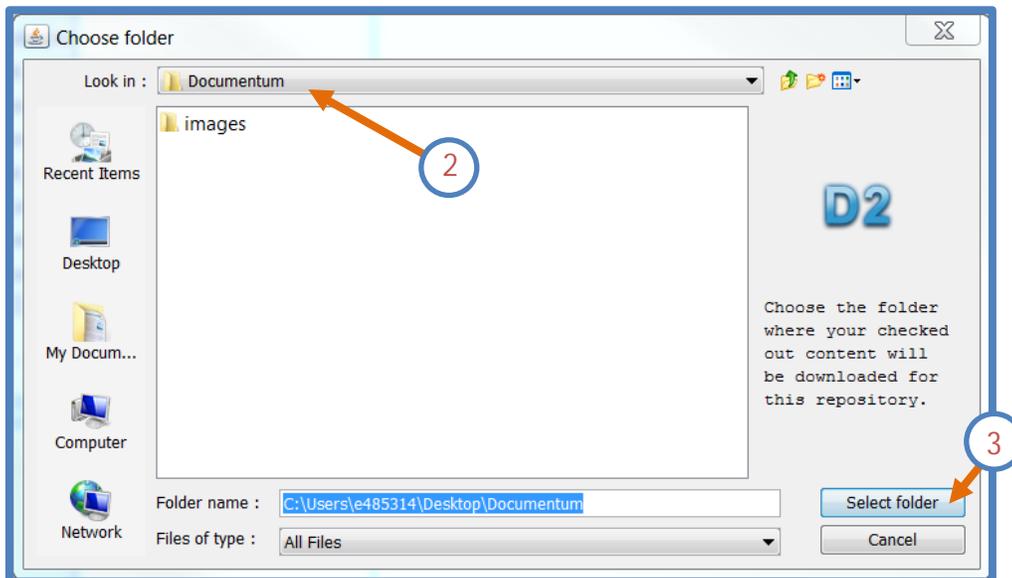
The *Temporary and Checkout Paths* can be the same folder. Both paths should be in folders that are being backed up.

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.



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

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

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  LA County cabinet icon and navigate to the folder where to import the new document.

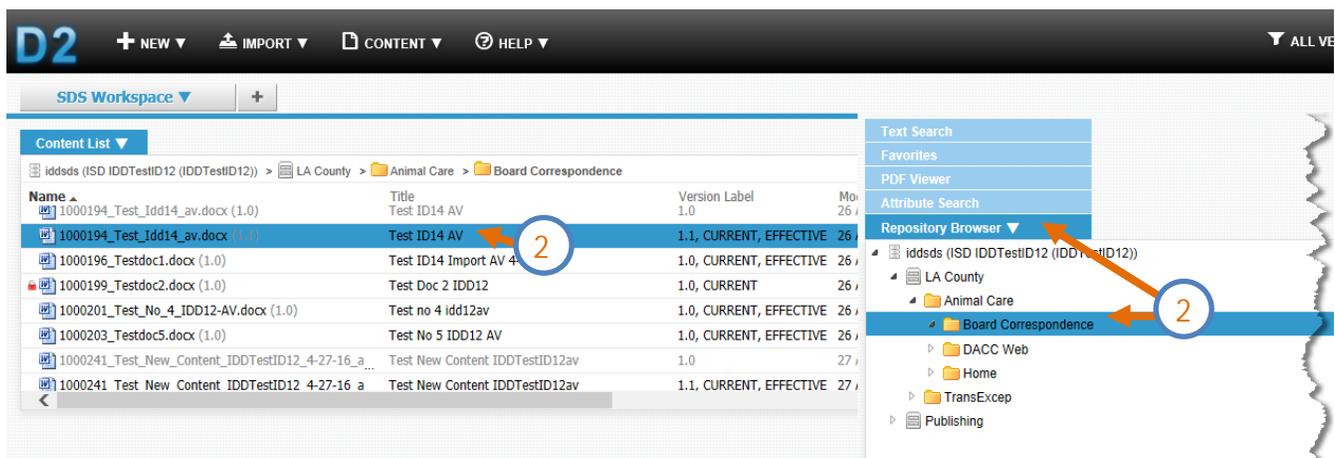


The screenshot shows the 'SDS Workspace' interface. Under the 'Content List' dropdown, there is a list of folders. The 'LA County' folder is highlighted with a red circle containing the number '1' and an orange arrow pointing to it. The folder name is 'LA County' and the title is 'SDS LA County Cabinet'.

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

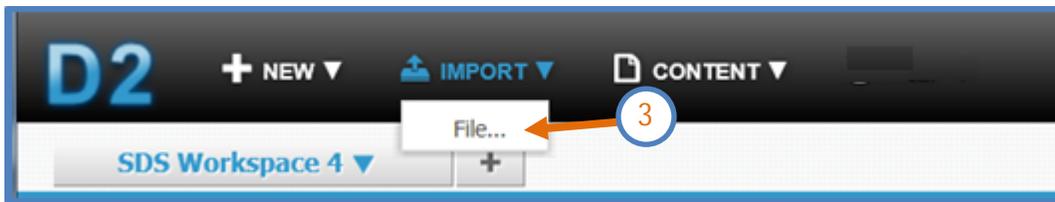


Use the Repository Browser as an alternative to quickly expand and locate the desired folder.



The screenshot shows the D2 interface. The 'Content List' table has a row for '1000194_Test_Idd14_av.docx (1.1)' highlighted in blue, with a red circle containing the number '2' and an orange arrow pointing to it. The 'Repository Browser' on the right shows a tree view of folders, with 'Board Correspondence' highlighted in blue, and a red circle containing the number '2' and an orange arrow pointing to it.

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  button to select the local folder where the original file is stored.

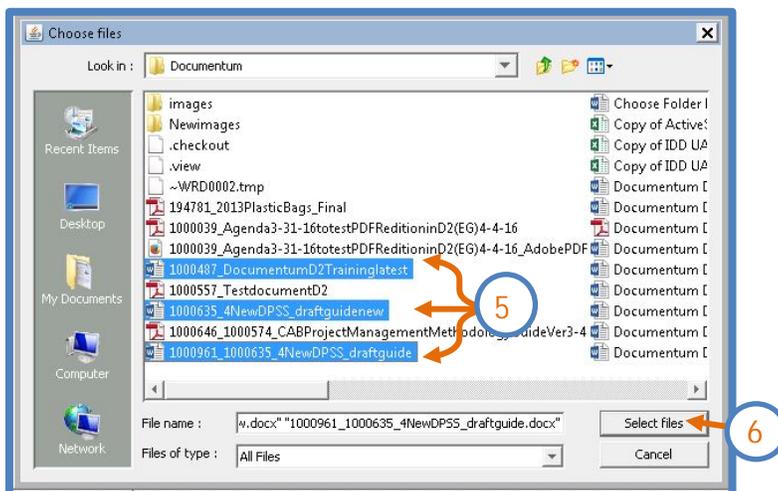


Step 5 – Choose the file(s) to import. The user has the *option* to *select one* or *multiple* documents to import all at *one* time.



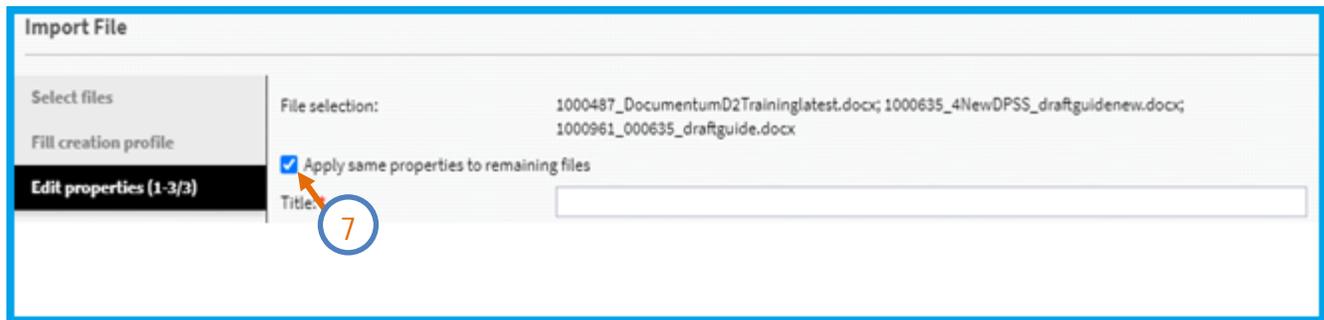
Hold the *Ctrl* button to highlight multiple documents.

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

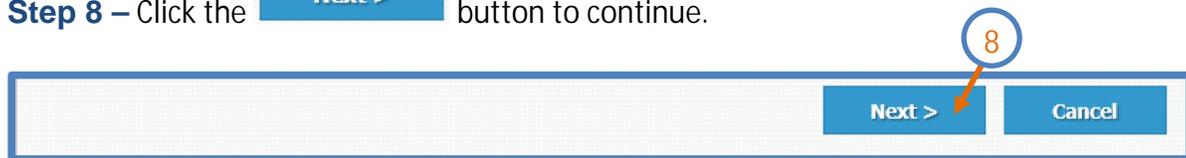


The files selected will appear in import list (*as shown below*).

Step 7 – Select the checkbox Apply same properties to remaining files if properties (Title, Author, etc.) are the same for each file selected.



Step 8 – Click the **Next >** button to continue.



Import File Edit Properties Window

“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.”

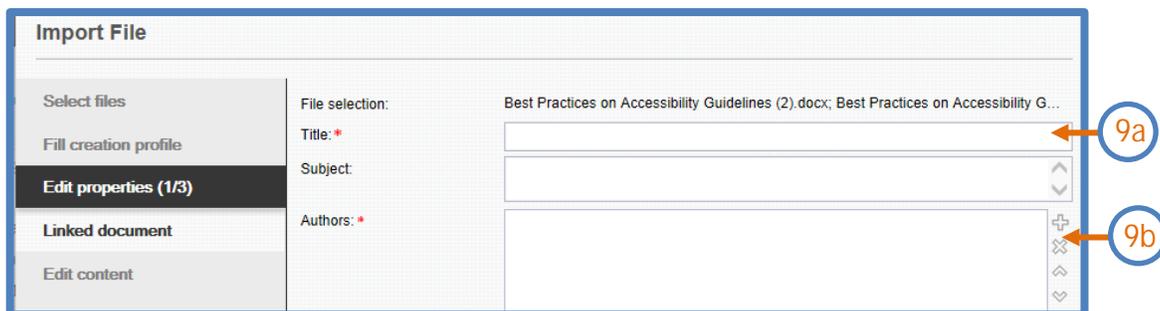


Depending on your security configuration or the type of documents you are working with, the selections shown here may be different from those in the image below.

Enter information for *all * required fields*.

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

Step 9 b – Authors (**required*) - Click the  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.



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  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  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 MUST also be selected for the system to expire the document.

Audience Type: *	Internet		
Document Date:	20 Aug 2015		
Publish Date:	21 Aug 2015		
Publish Hour:	Select Hour		
Expiration Date:	22 Aug 2015		
Expiration Hour:	Select Hour		

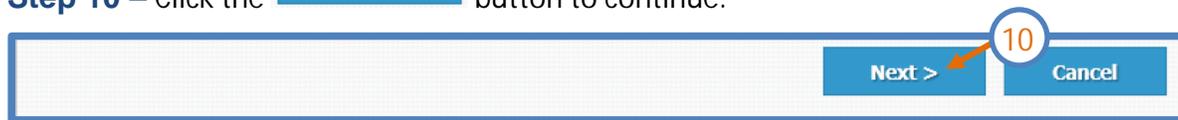
Step 9g – (*optional*) Select the “Request Email” Request Email: checkbox.



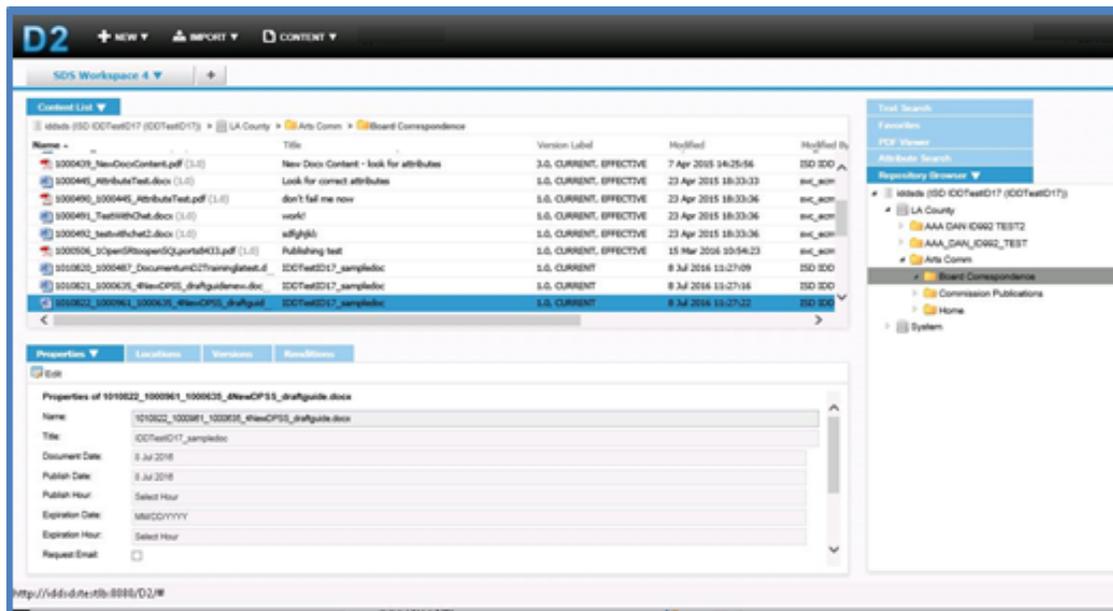
“Request Email” checkbox triggers a notification email to be sent back to you when the document has successfully published. The notification will include the native and rendition published URLs as well as Documentum internal URLs.

Request Email:	<input checked="" type="checkbox"/>	
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Step 10 – Click the **Next >** button to continue.

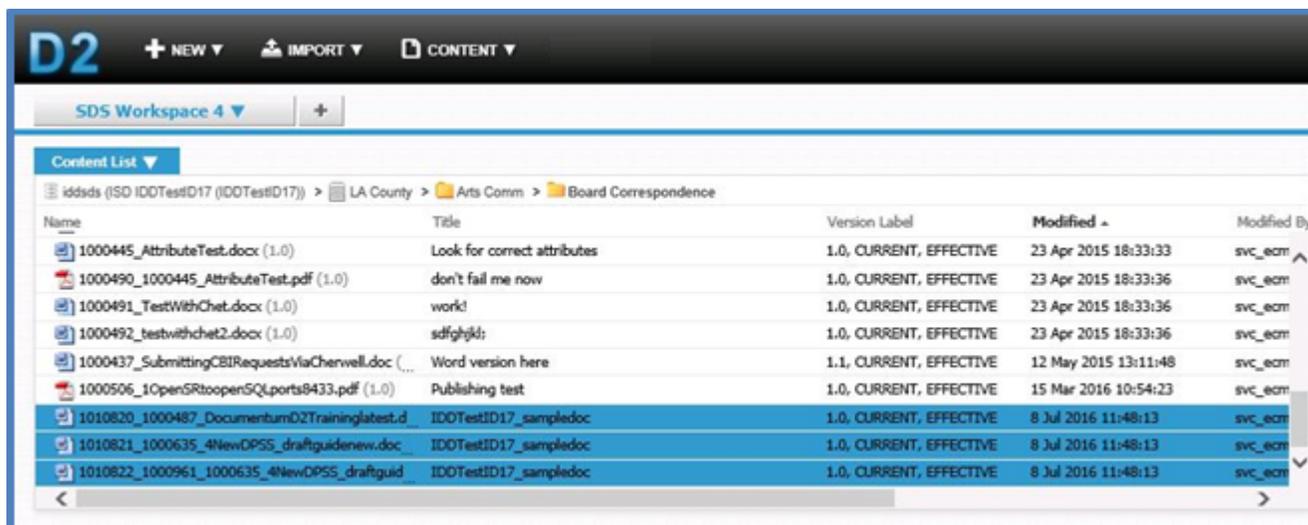


The imported files are added to the Content List. The Properties tab shows the attributes of the documents imported.



“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.



 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

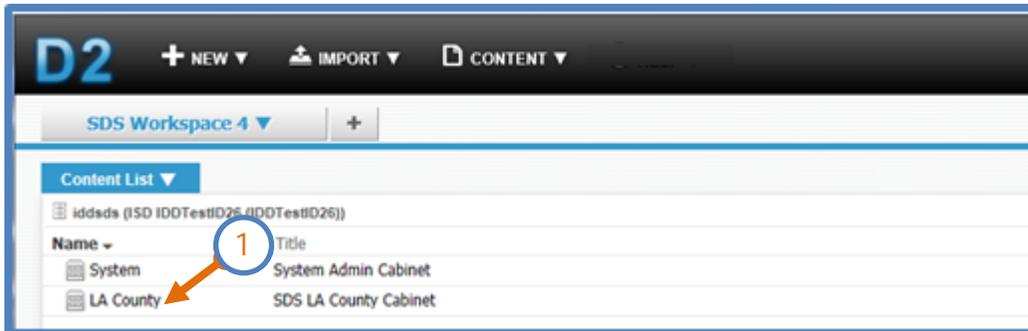
For documents in D2, the user can *check out* the document and retain exclusive use for editing purposes. While the document is checked out, no one else can edit, check-out, or check-in the document.

A lock icon  will appear to the left of the file name in the *Content List* widget.

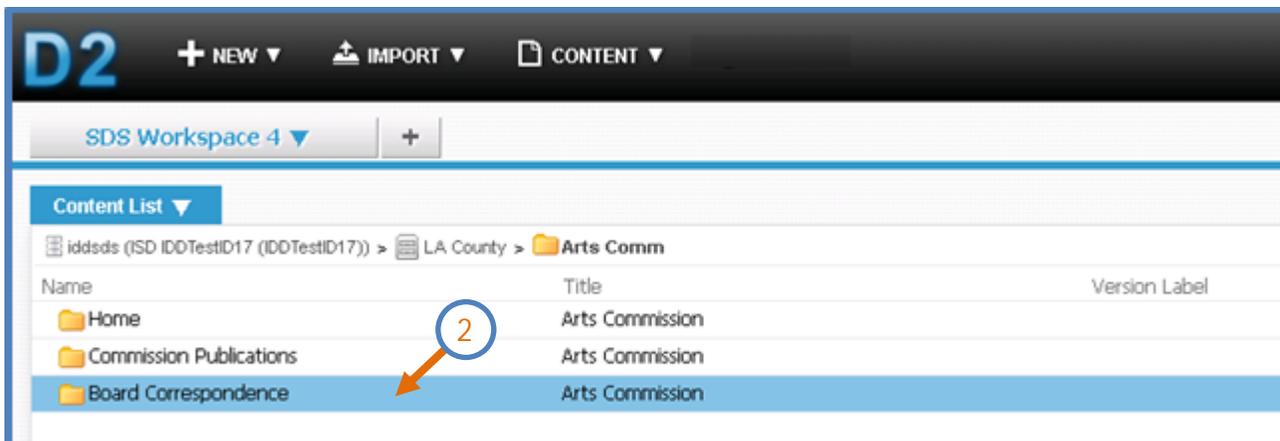


Users must be in their content folder to checkout documents.

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

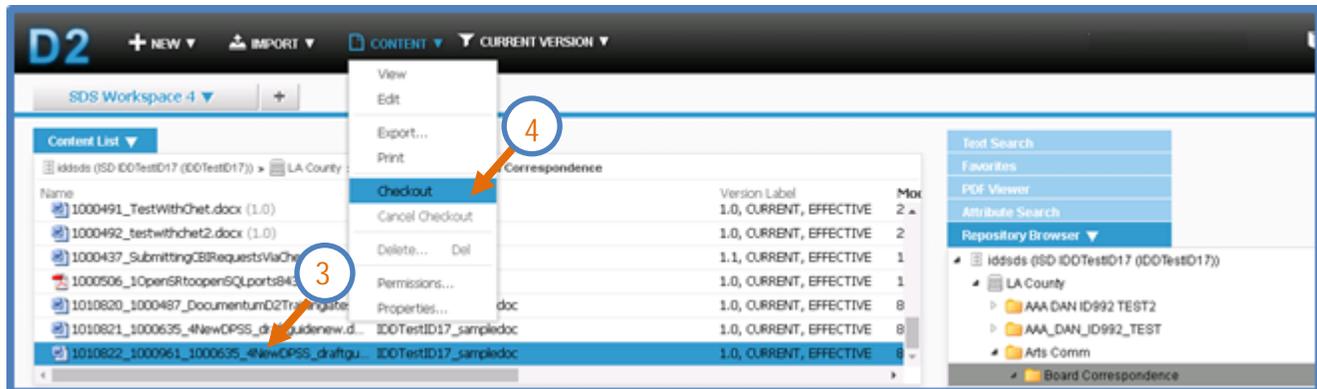


Step 2 – Double-click to open all necessary folders. Continue to open folders until the document is located.



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.

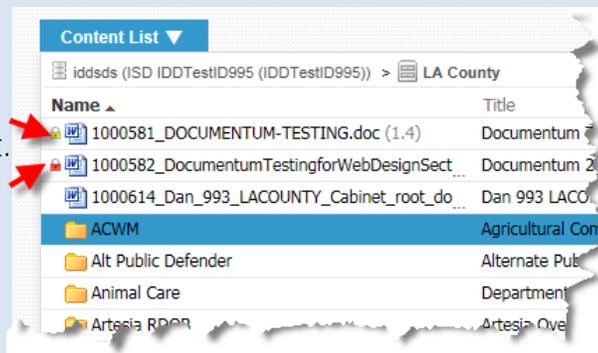


When editing a document, D2 locks  the document until the user *either checks the document back into the D2 repository or “cancels checkout.”* If cancel check-out is performed, all changes since the last check-in will be lost. Do not leave documents checked out *any longer* than necessary.

There are two lock colors:

Green: means you locked it.

Red: Someone else locked it.



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.



The checked out document will open in the native format (i.e.: Word, PDF, or Excel.)
The user has the ability to make changes to the document.

*** Do not leave documents checked out any longer than necessary.*

D2 Downloader
Downloading 1000635_4NewDPSS_draftguide.docx
Transferring ...

MS Word document downloaded and opened

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

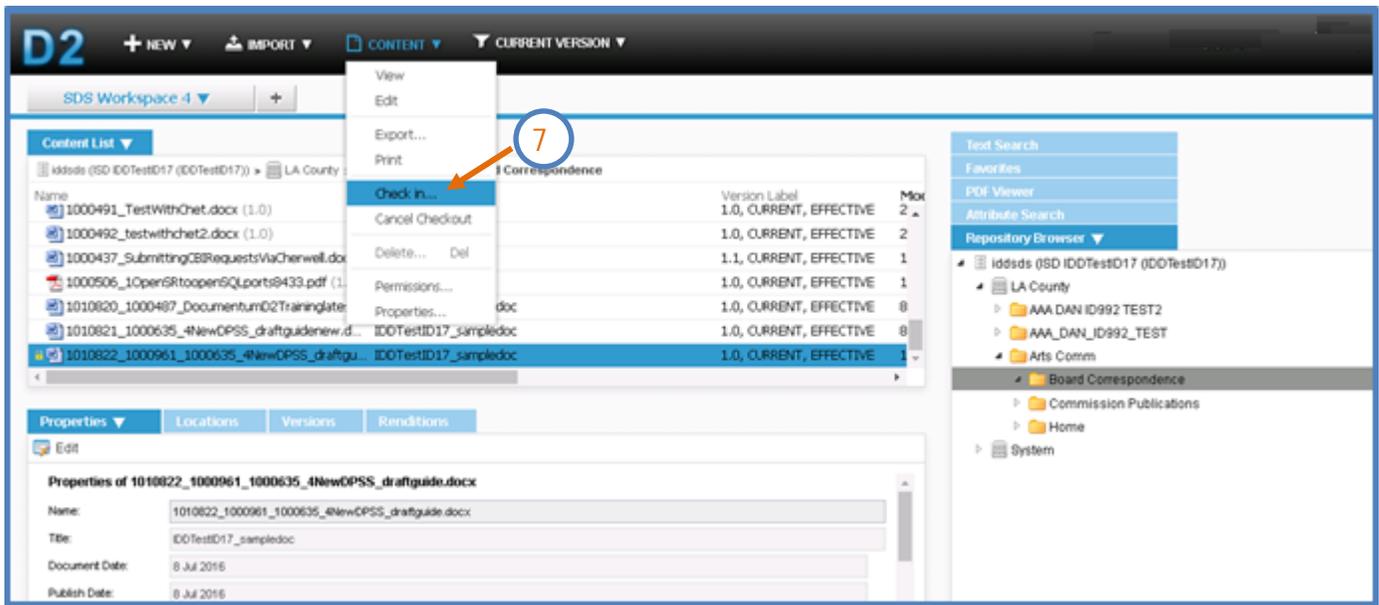
Documentum D2_7_5_16blatest - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW

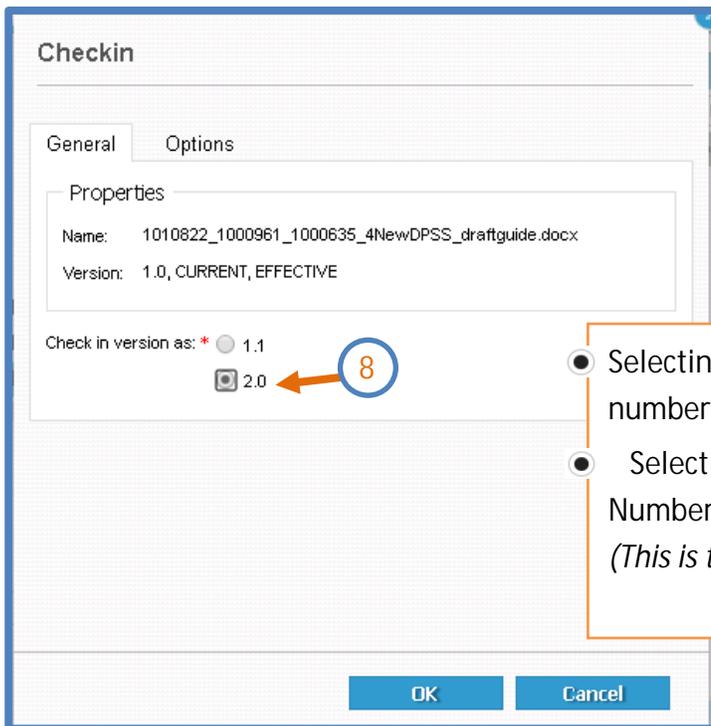
Remove Background, Color, Artistic Effects, Compress Pictures, Change Picture, Reset Picture

Adjust, Picture Styles

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



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

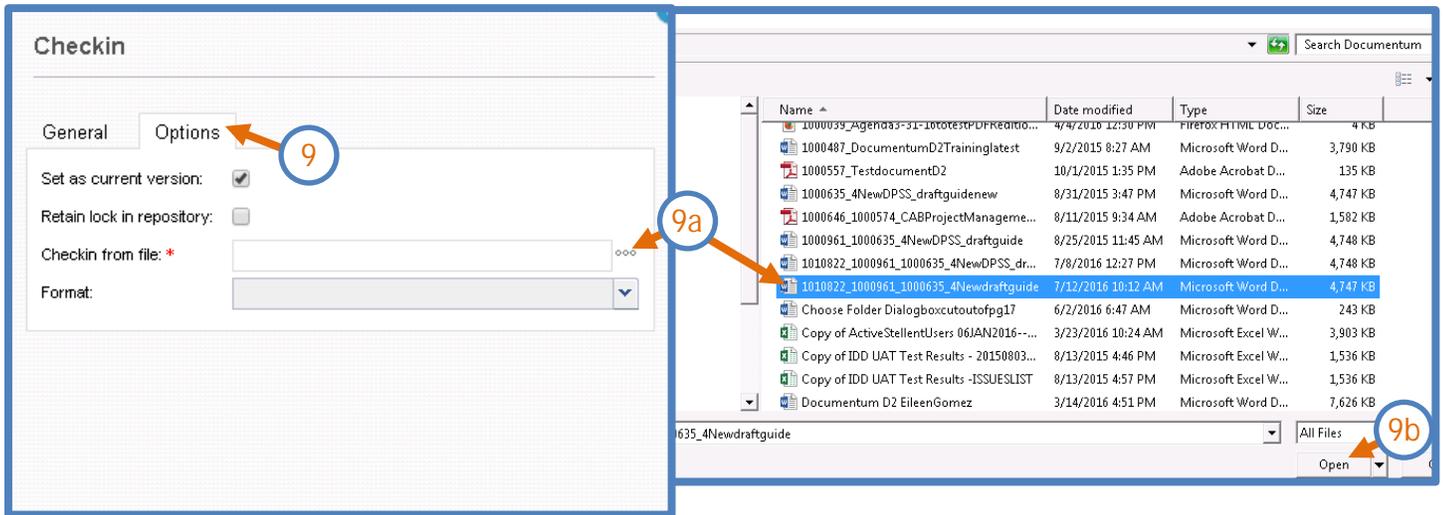


- Selecting (1.1) - will assign an increased decimal version number.
- Selecting (2.0) - will assign a whole number version. Number will increase to this new version. *(This is the preferred option!)*

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

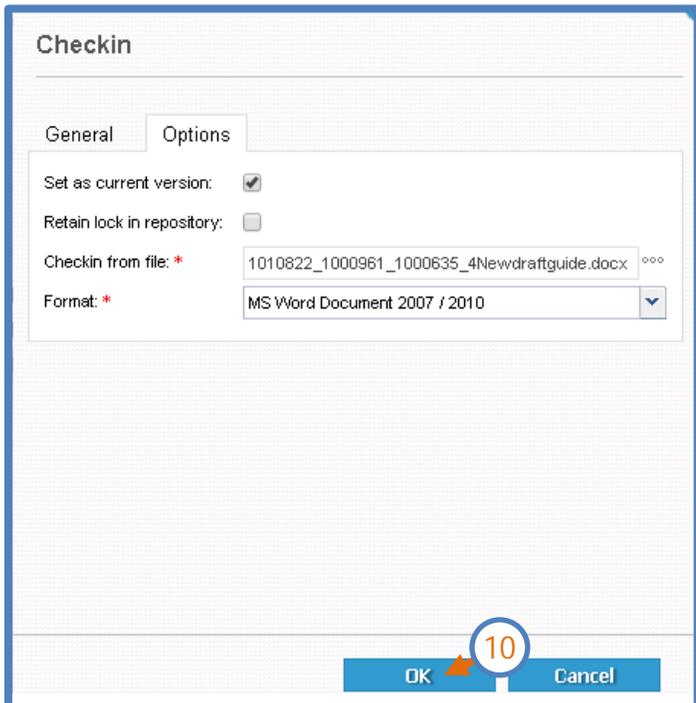
Step 9 – (optional) Select the *Options tab* to select a different file to upload as this new version.

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



Step 9b – Select the  button complete checking in file.

Step 10 – Once the selected the file name and format appear, click the  button to Save version changes.



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.

The screenshot shows the D2 Content List interface. The table below represents the data shown in the interface:

Name	Title	Version Label	Mod
1000491_TestWithChet.docx (1.0)	work!	1.0, CURRENT, EFFECTIVE	2
1000492_testwithchet2.docx (1.0)	sdfighjt	1.0, CURRENT, EFFECTIVE	2
1000437_SubmittingCBRequestsViaCherwell.doc ...	Word version here	1.1, CURRENT, EFFECTIVE	1
1000506_1OpenSRtoopenSQLports8433.pdf (1.0)	Publishing test	1.0, CURRENT, EFFECTIVE	
1010820_1000487_DocumentumD2Traininglatest...	IDDTestID17_sampledoc	1.0, CURRENT, EFFECTIVE	
1010821_1000635_4NewDPSS_draftguidenew.d...	IDDTestID17_sampledoc	1.0, CURRENT, EFFECTIVE	
1010822_1000961_1000635_4NewDPSS_draftgu...	IDDTestID17_sampledoc	2.0, CURRENT	

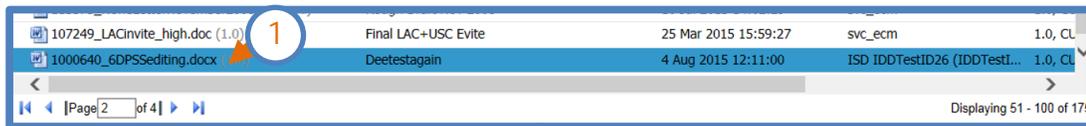
Step 12 – File showing the “CURRENT, EFFECTIVE”, label is now published.

The close-up screenshot shows the following data from the Content List table:

1010821_1000635_4NewDPSS_draftguidenew.d...	IDDTestID17_sampledoc	1.0, CURRENT, EFFECTIVE	
1010822_1000961_1000635_4NewDPSS_draftgu...	IDDTestID17_sampledoc	2.0, CURRENT, EFFECTIVE	

Editing Document Properties

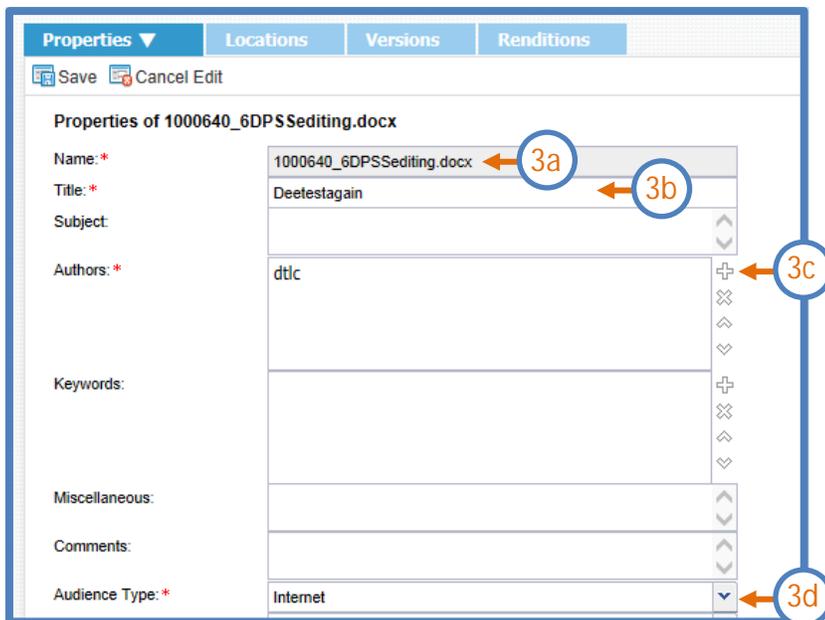
Step 1 – In the Content List window, highlight the file to edit.



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



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



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.

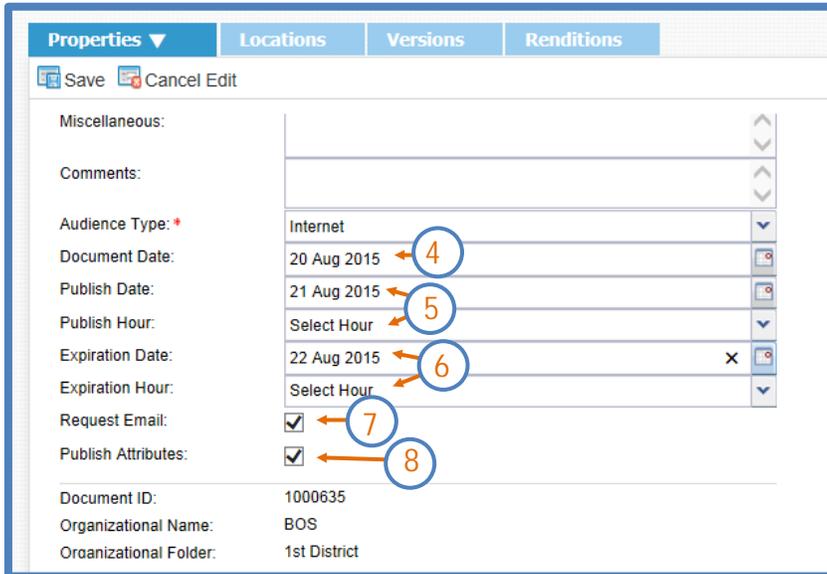
3d) Audience Type:*

Click the  button, to change the default if desired.

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

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

Step 6 – (optional) Click the  icon to select desired *Expire Date* and *Expire Hour*.



Properties		Locations	Versions	Renditions
Save Cancel Edit				
Miscellaneous:				
Comments:				
Audience Type: *	Internet			
Document Date:	20 Aug 2015	4		
Publish Date:	21 Aug 2015	5		
Publish Hour:	Select Hour			
Expiration Date:	22 Aug 2015	6		
Expiration Hour:	Select Hour			
Request Email:	<input checked="" type="checkbox"/>	7		
Publish Attributes:	<input checked="" type="checkbox"/>	8		
Document ID:	1000635			
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:	<input checked="" type="checkbox"/>	7
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Step 8 – (* required) Select the “Publish Attributes” For *CURRENT* or *CURRENT, EFFECTIVE* documents, if only attributes (like publish/expire dates, keywords, comments, etc., not the content of the document itself) are changed. By checking the box, the system will update these fields on the published document by republishing the document. If there is a new version of a document with attribute changes, the document with updated attributes will be published automatically. There is no need to select the ‘Publish attributes’ box.



“Published Attributes” checkbox *must be* checked to update the document properties only. Remember, to modify documents that are EFFECTIVE only, it is necessary to check-out/check-in the document as a new version to make any change.

Step 9 – Click  Save button to save changes to the document properties. Properties window will close.

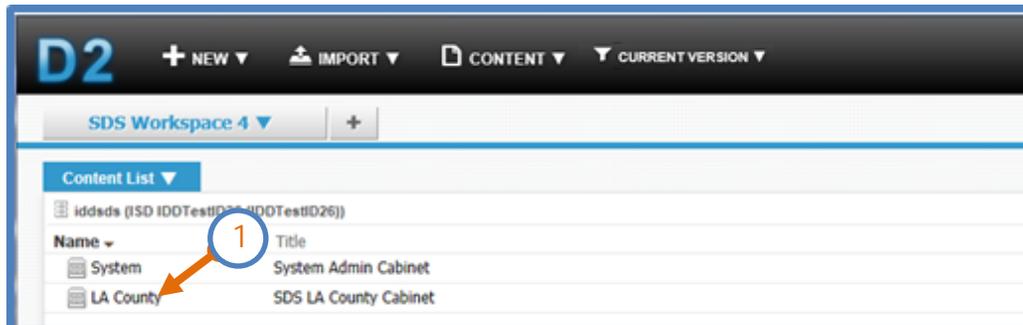
Expire a Document

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

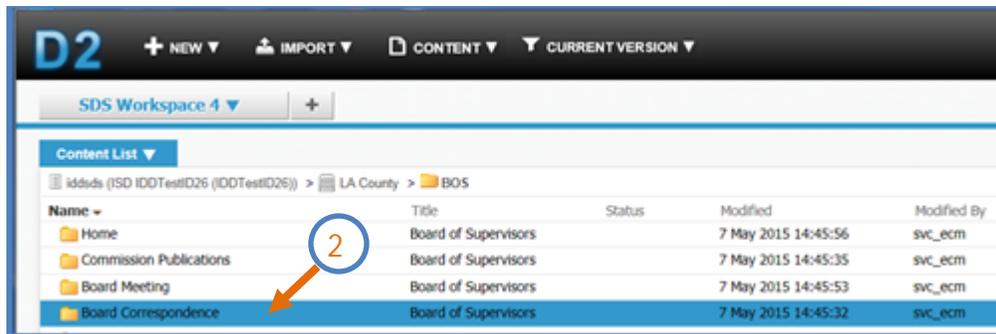


Users must be in their content folder to expire documents.

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



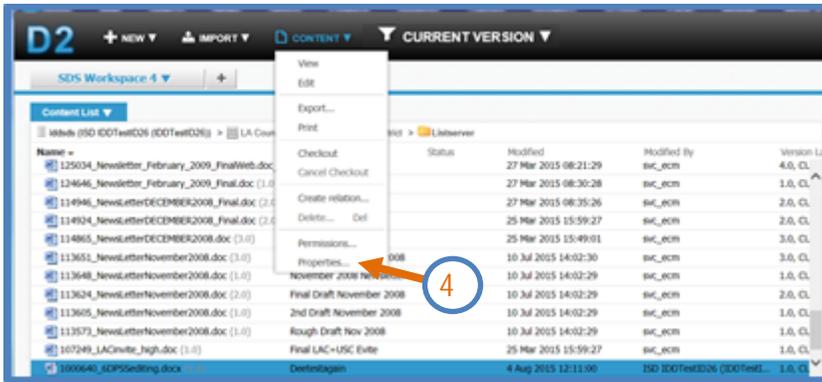
Step 2 – Double-click to open all necessary folders. Continue to open folders until the document is located.



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



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



Step 5 – The Properties dialog box opens. Enter the Authors name in the field by clicking the  button.

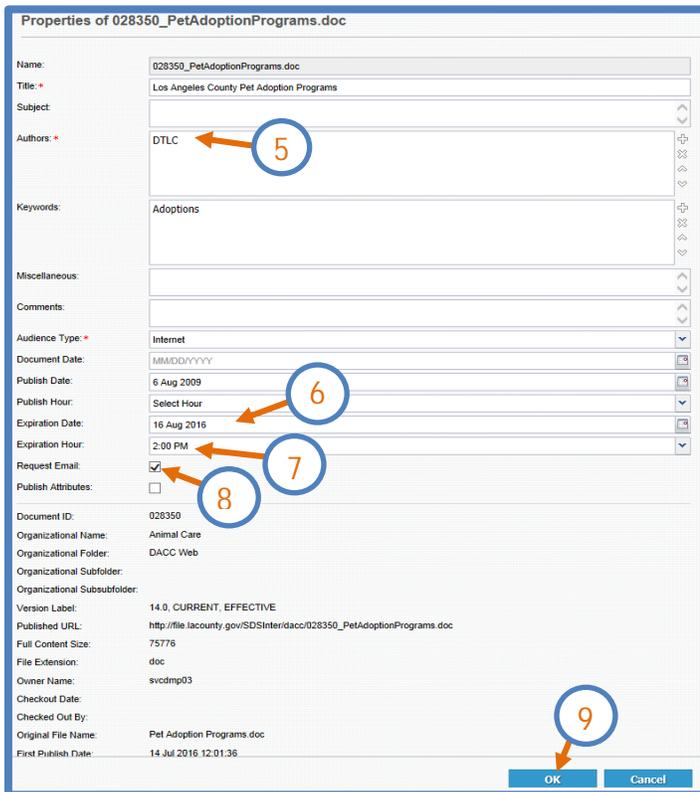
Step 6 – Click the Expire Date  icon to select a *past date*. In the expiration field.

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 must have an expiration date. Time is optional.

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



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

Published Email Overview

The Request Email: checkbox in the document properties window triggers a notification email.



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

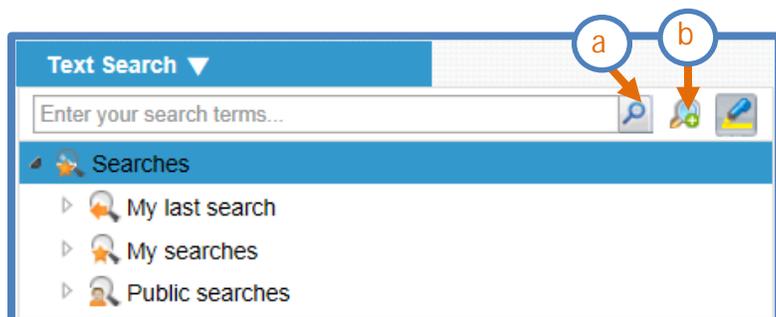


Note: This email is for information purposes only. If you have questions concerning this email, do NOT reply to this email. No one is monitoring the DO_NOT_REPLY@isd.lacounty.gov mail box.

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*.

Step 2 - Click the search button  to search.

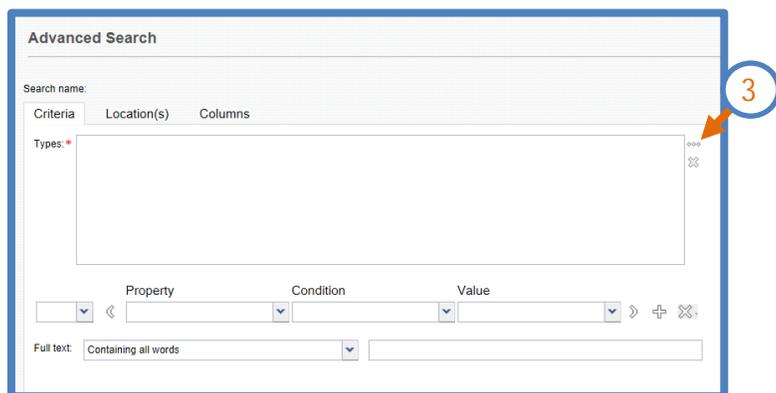
Advanced Search

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

Step 1 - Navigate to Advanced Search  icon.

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

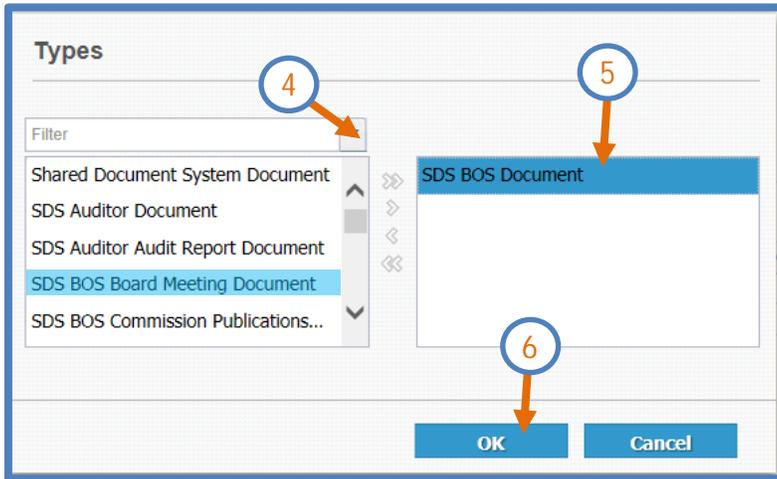
Step 3 – Click the  to add the *Content Types* for the *Search*.



Step 4 – Click on the value.

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

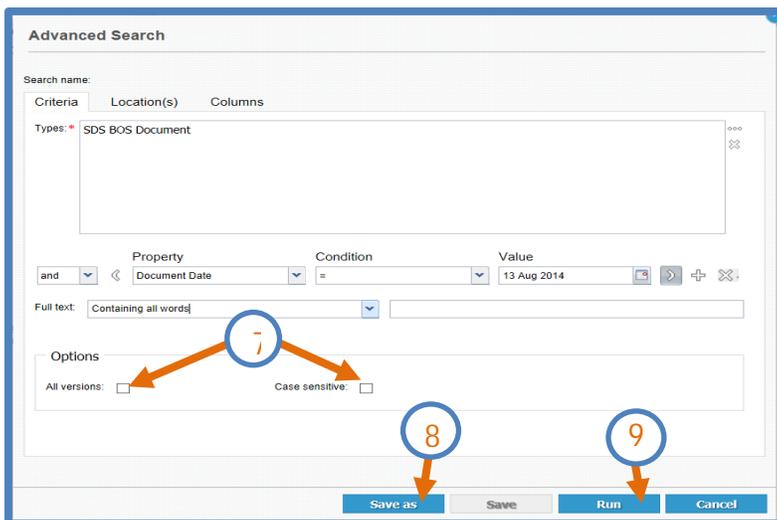
Step 6 – Click the  button to continue.



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

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

Step 9 – Click  button to run the search.



Step 10 – The Content List displays Search Results.

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



- ✓ Click My last search to load the previous search and show last searches that was run.
- ✓ Click My searches to show all searched saved by you.
- ✓ Click Public searches to show all searches saved as public.

The screenshot displays the D2 software interface. At the top, there is a navigation bar with 'D2' and several menu items: '+ NEW', 'IMPORT', 'CONTENT', and 'CURRENT VERSION'. On the right side of the top bar, it shows 'IDDSDS', a user profile 'user (user)', and a help icon. Below the top bar, there is a section for 'SDS Workspace 4'. The main area is divided into two panels. The left panel, titled 'Content List', shows a table of files with columns for 'Name', 'Title', 'Status', and 'Modified'. The files listed are PDF documents with titles ranging from 'SCHOLARSHIPAPP1' to 'SCHOLARSHIPAPP21'. An orange arrow labeled '10' points to the first few rows of the table. The right panel, titled 'Text Search', shows a search results page. It has a search input field at the top. Below it, there is a list of search results under the heading 'Searches'. The results include 'My last search', 'My searches', 'testDionneSearch', and 'Public searches'. An orange arrow labeled '11' points to the 'testDionneSearch' result. At the bottom of the content list, there is a pagination control showing 'Page 1 of 6' and 'Displaying 1 - 50 of 300'.

Drag & Drop

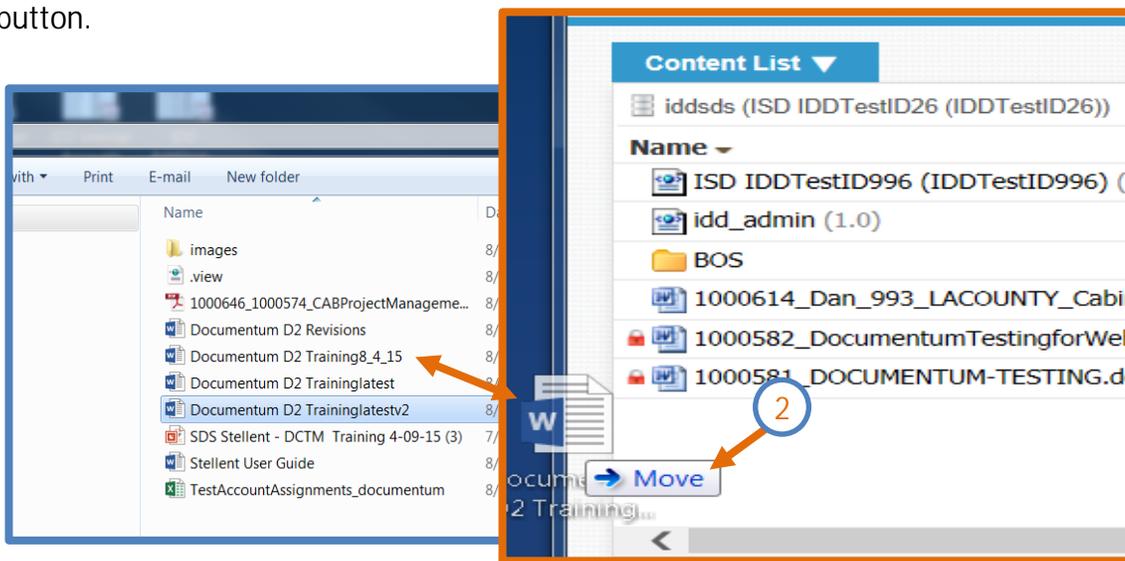
Drag and Drop is a shortcut to import documents into the D2 repository from your selected folder.



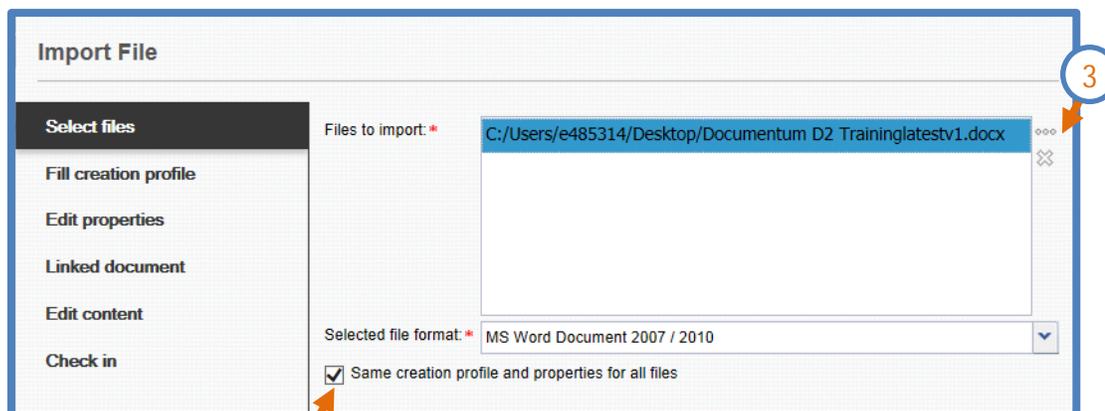
Users' access to folders are based on their security and accounts. Users must be in their *Content List* folder to import new documents.

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.

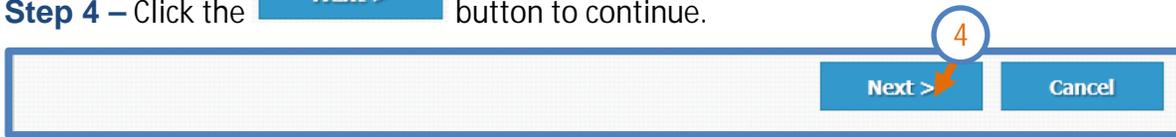


Step 3 – The import file window opens. The Import dialog window lists the files and the format automatically populates as shown in the example below.



** Uncheck the "Same creation profile and properties for all files" checkbox if you are importing *multiple documents* with different *profiles*.

Step 4 – Click the **Next >** button to continue.



Edit Properties Window

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

5a) Title: *

Enter a Title.

5b) Authors: *

Click the  icon to add an Author(s) names.

5c) Audience Type: *

Click the  button, to select the 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.

Step 10 – (optional) Select the “Publish Attributes” checkbox.



Publish attribute checkbox *is not* required for import.

Step 11 – Click  button to continue through the *import file* workflow.



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.

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 be performed on password protected documents. If password protection is required, contact IDD for additional discussion.

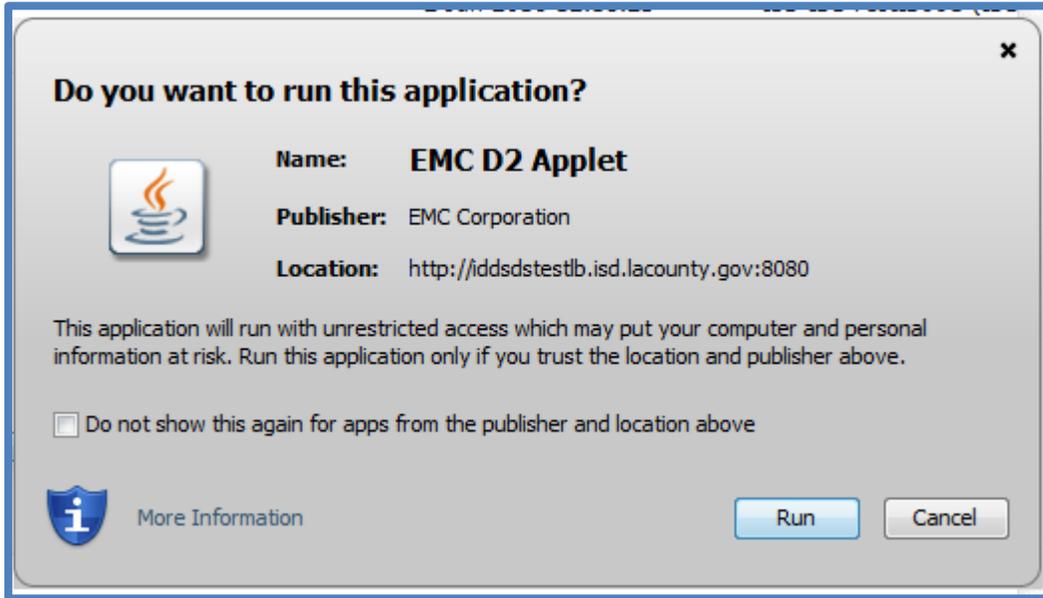
Use the Repository Browser to browse through folders:

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

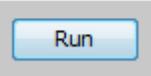
First Scenario

When first logging in to D2.....



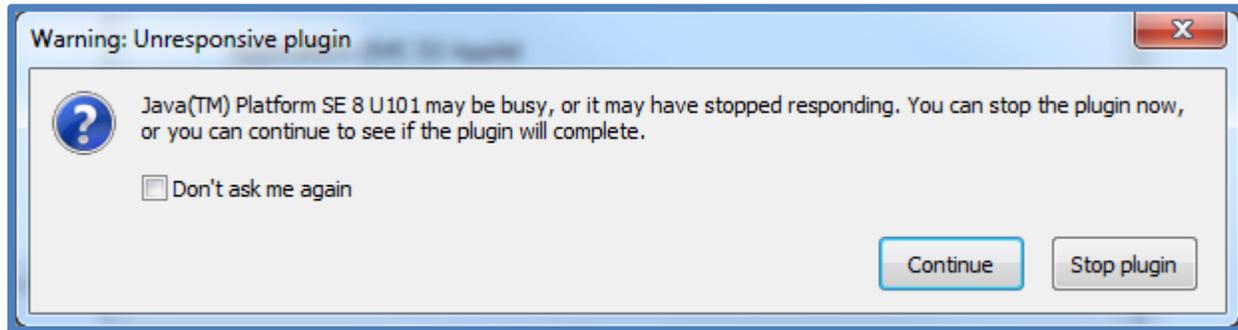
Step 1 – Select do not show again



Step 2 – Select the  button to run the JAVA applet to continue through the process.

Second JAVA Scenario

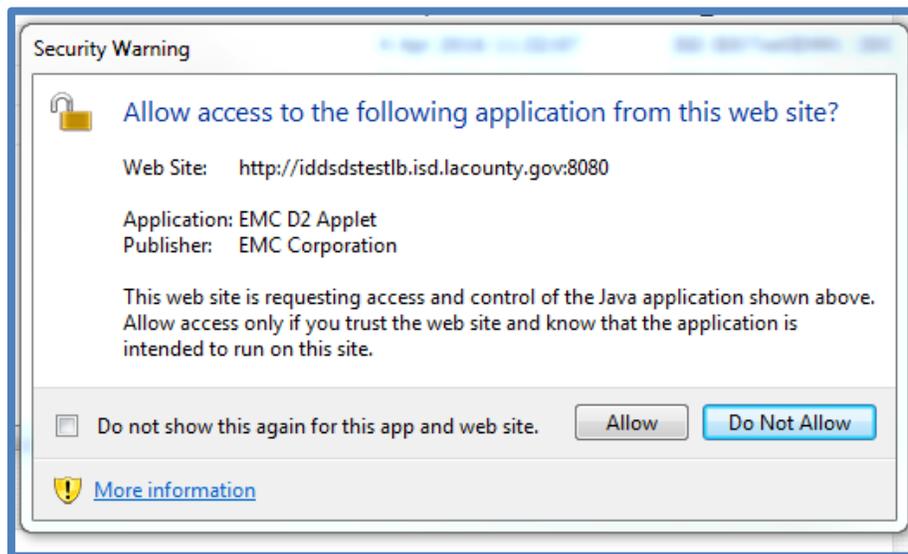
When there is a warning of an Unresponsive plugin pops-up...



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

Third JAVA Scenario

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



Step 1 – Select the Do not show this again for this app and web site. checkbox;

Step 2 – Then select the button to proceed.

The user may see this warning banner that the Java plugin has crashed...

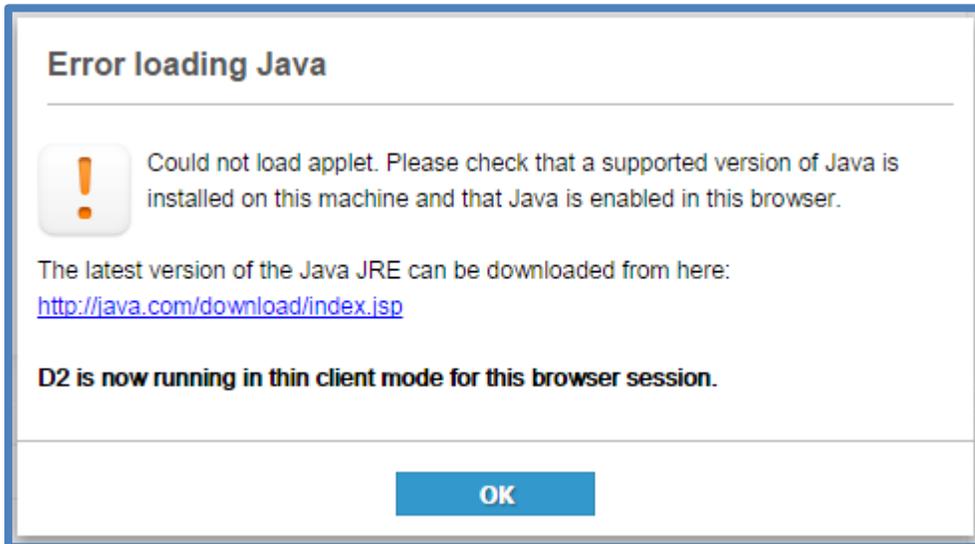


Reload page

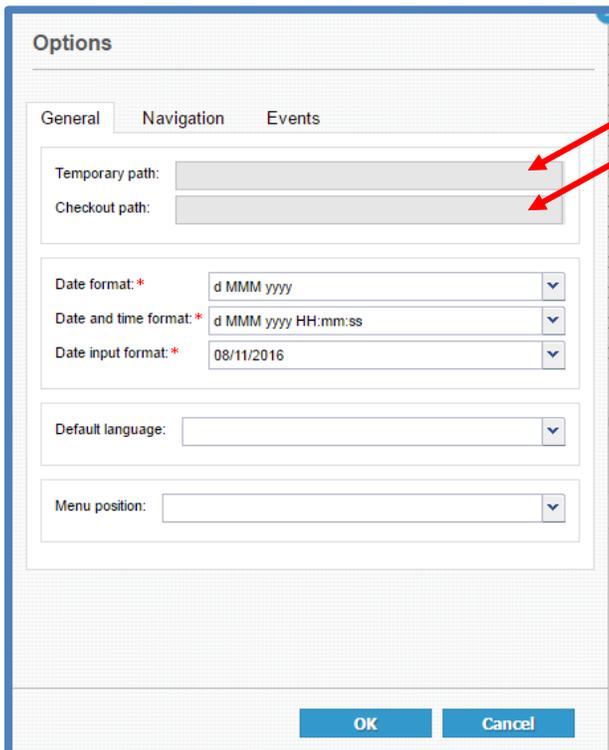
Step 3 – Select the button to reload the page and start again.

Fourth JAVA Scenario

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



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.



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 accessed 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 [D2 training video](#)

Link to the [D2 user guide](#)

Link to the [D2 Test environment](#)

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.

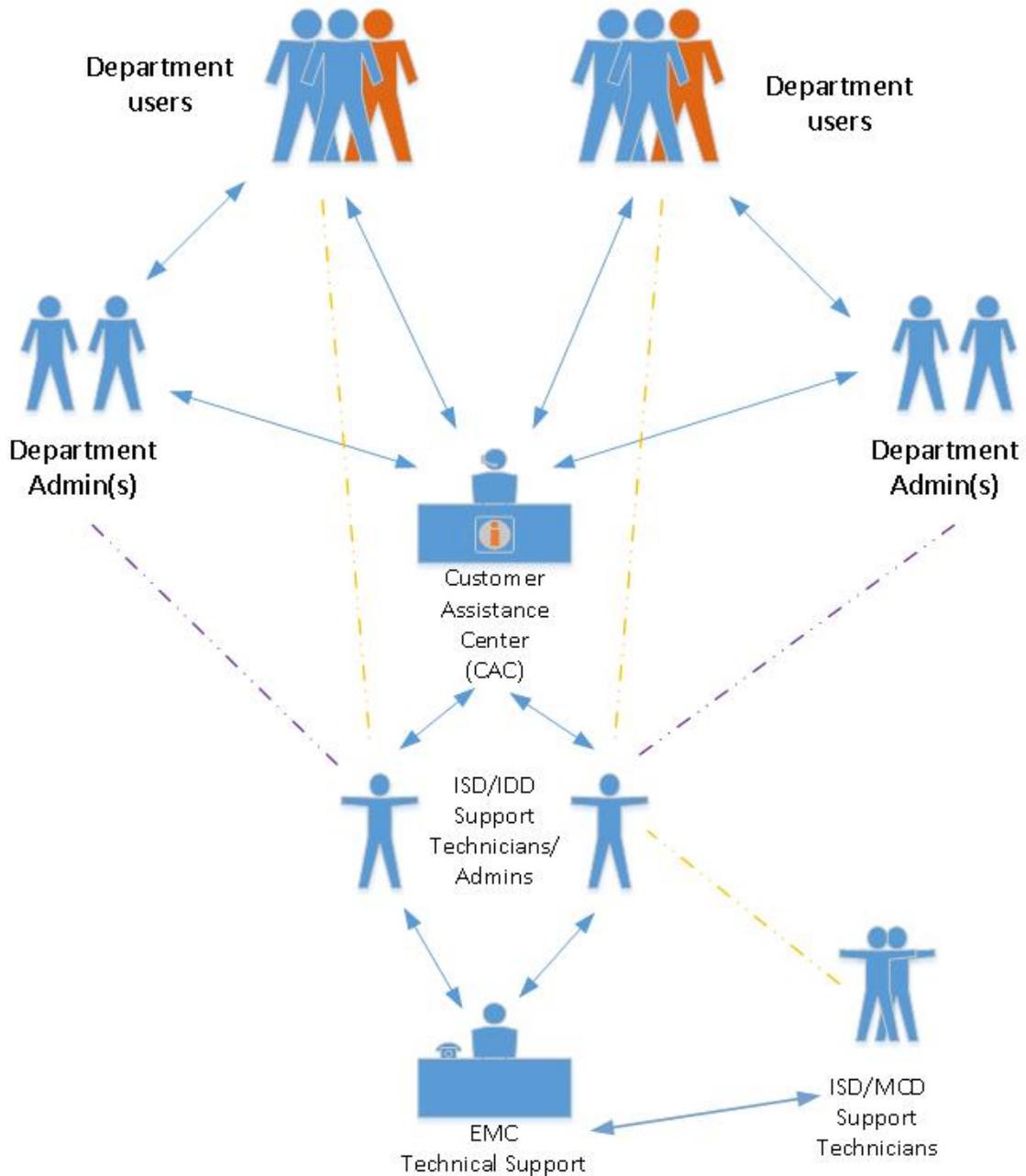
ISD will provide a quick response to any questions through *SDS Support email*:
sdssupport@isd.lacounty.gov.

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)*.
3. 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 Diagram



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.