

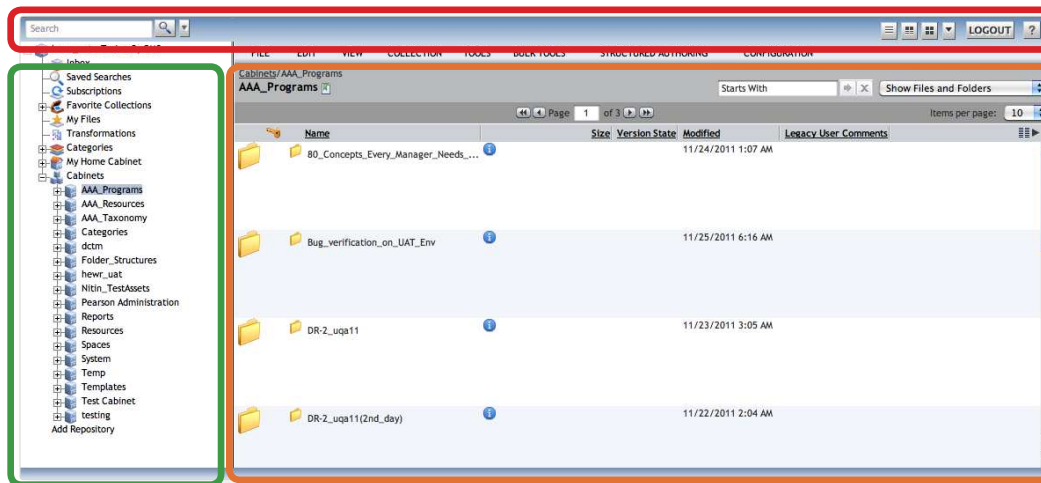
Quick Reference Guide

Interface

The Documentum interface is divided into three areas:

1. The **Banner** stretches across the top of the screen and includes global search, advanced search, menu options, column view options, and a logout and help button.
2. The **Navigation pane**, also known as the Navigation tree (or folder structure), is on the left-hand side and contains the directory structure.
3. The **Content pane** on the right-hand side is also known as the work area.

Banner



Navigation pane **Content pane**

Banner

The **Banner** at the top of the Documentum screen includes global search, advanced search, menu options, column view options, a **LOGOUT** button, and a **Help** button.



Simple Search Text box: Type query terms in this text box to search the entire Documentum repository. Searches are Boolean and provide exact matches on spelling, but are not case sensitive.



Start Search: Click the **Start Search** icon to launch a simple search.



Advanced Search: Click this button to access the **Advanced Search** screen. Advanced search provides ways to refine search options for specific locations, object types, metadata, date ranges, sizes, etc.

FILE

FILE Menu: Options for this menu depend on a user's role and permissions and node/folder/file selection. Options may include: **New** (Folder or Document), **Edit**, **Open (Read Only)**, **Save As**, **Check In**, **Check Out**, **Cancel Checkout**, **Import Rendition**, **Import**, **Export**, **Delete**, **Email as Link**, **Help**, **Add to Room**, **Remove from Room**, **Send to Storage Station**, **Mark Discussion Read**, **Mark Discussion Unread**, **Help**, **About Digital Asset Manager**, **Logout**, **Zip and Export**, and **Zip and Email**.

EDIT

EDIT Menu: Options for this menu depend on a user's role and permissions and node/folder/file selection. Options may include **Add to PowerPoint Assembly**, **Add to Clipboard**, **Move Here**, **Copy Here**, **Link Here**, **View Clipboard**, **Copy Here Folder Only**, and **Unassign**.

VIEW

VIEW Menu: Options for this menu depend on a user's role and permissions and node/folder/file selection. Options may include **Properties**, **Versions**, **Relationships**, **Renditions**, **Locations**, **Snapshots**, **PowerPoint Assembly**, **Video Details**, and **Discussion**.

COLLECTION

COLLECTION Menu: Options for this menu depend on a user's role and permissions and node/folder/file selection. Options may include **Add to Collection**, **View Collection**, **View Favorite Collections**, and **View Active Downloads**.

TOOLS

TOOLS Menu: Options for this menu depend on a user's role and permissions and node/folder/file selection. Options may include **Virtual Documents, Workflow, Subscribe, Subscribe Others, Unsubscribe, Turn On/Off Read Notification, Turn On/Off Change Notification, Export to CSV, Transform, Submit for Categorization, New Window, View Messages, Job Status, Transformation Report, Preferences,** and **Reports.**

BULK TOOLS

BULK TOOLS Menu: Options for this menu depend on a user's role and permissions and node/folder/file selection. Options may include **Import, Import Metadata, Checking, Checkout, Export, Download Metadata Template, Job Status, Local Status Queue,** and **Start Job Process.**

STRUCTURED AUTHORING

STRUCTURED AUTHORING Menu: Options for this menu include **Structured Export, Structured Checkin, Structured Checkout,** and **Apply Template.**

CONFIGURATION

CONFIGURATION Menu: This menu includes the **Configure Workflow** option.



List View Column option: Displays files and folders in a list, along with thumbnails and information in resizable columns.



Lightbox View Column option: Displays a thumbnail with folder/file information, grouped together in boxes.



Thumbnail View Column option: Displays thumbnails of each file or folder.



Thumbnail Sizes: The clickable down arrow changes the display of thumbnails, with these choices: **Small Thumbnails, Medium Thumbnails,** or **Large Thumbnails.**

LOGOUT

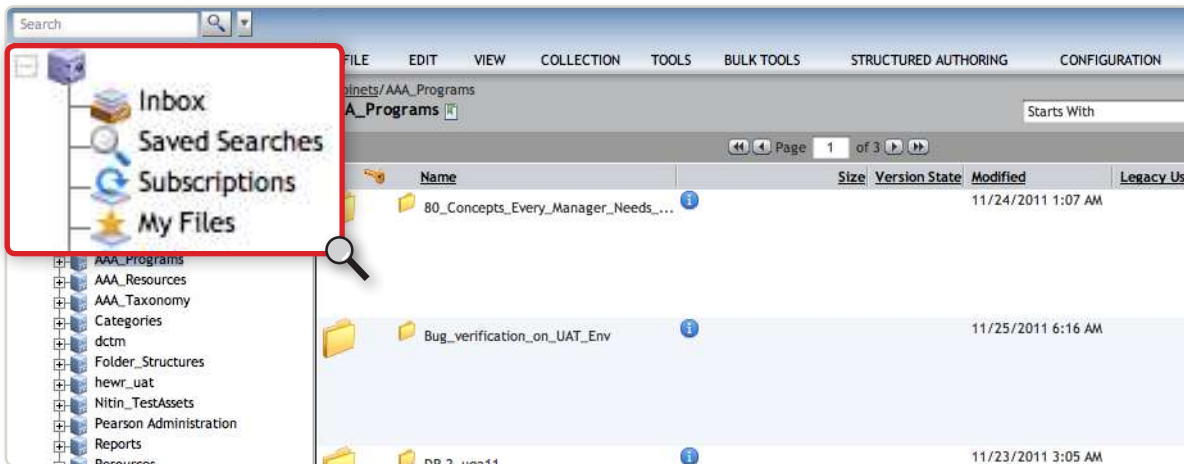
Logout: Logs the user out of the Documentum repository.



Documentum Help: Displays a help screen with **Contents** and **Index** tabs, as well as a downloadable PDF of the **User Guide.**

Navigation Pane: Node Icons

The hierarchical Navigation pane on the left side of the Documentum interface contains items called nodes that are represented by icons. Default nodes at the top of the navigation pane are specific to your user account and help you interact with content in Documentum.



Inbox: Your **Inbox** contains tasks and notifications.



Saved Searches: The **Saved Searches** node contains private searches which are searches created by you, and public searches which are created by others. These searches can be launched without redefining, shared between users, and are a way to quickly retrieve search results. This node also contains searches that you have saved as search templates. Click the Search Templates link to view them.



Subscriptions: Files, folder, or cabinets you subscribe to (or objects that others subscribe you to) appear in the **Subscriptions** node, and when accessed are retrieved from their original location.



Favorite Collections: Holds your collection of assets that you have gathered through browsing or searching.



My Files: Assets you have recently created, edited, checked out or checked in appear in this node, and are held in this node for 7 days.



Transformations: Allows you to view the status of your transformation requests.



Categories: Inactive.



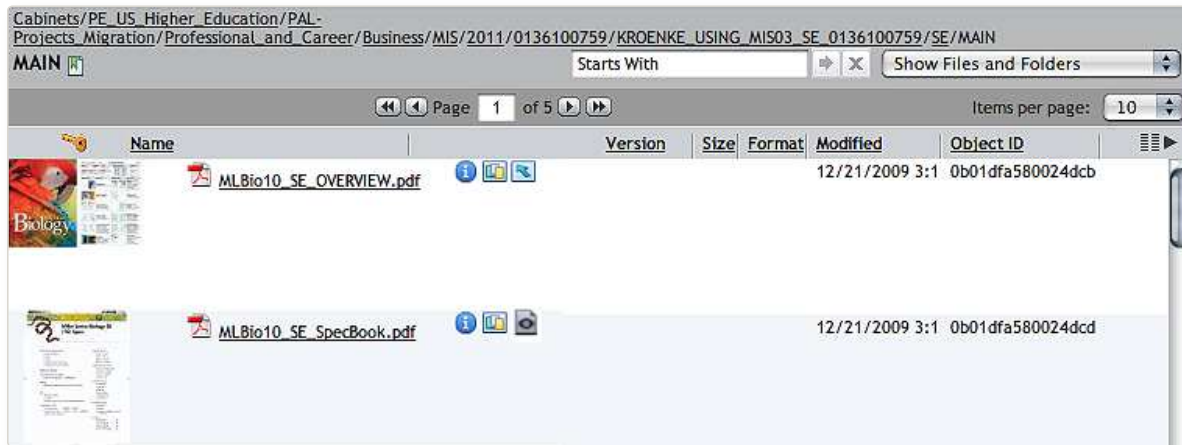
Cabinets: A **Cabinet** is the highest level of organization in the repository. All of the various types of folders and files are contained beneath.



Folders: A folder is the next level of organization below a cabinet. Folders can contain other folders and files.

Content Pane: Menus and Icons

Appearing on the right side of the Documentum interface, the Content pane is also known as the work area.



Cabinets/PE_US_Higher_Education/PAL-

Hyperlink Trail: Click a location in the hyperlink trail (breadcrumb trail) at the top of the Content pane to move up the folder hierarchy.

Starts With

Content Pane Filter: This text box filters content displayed in the Content pane that begins with a certain character string.

Show Files and Folders

Content Pane Object Type Filters: This drop-down menu filters the Content pane to display: files and folders, files only, folders only, calendar events only, or all objects and all versions.

Page 1 of 5

Page: Toggle through multiple pages of content by either inserting a page number, or clicking the arrows.

Items per page: 10

Items Per Page: Change the number of items displayed per page by choosing an increment from the drop-down menu.



Column Preferences: Set column preferences to specify the columns you want displayed in the Content pane and to change the order in which the columns appear.



Key: A key icon indicates that you have a file checked out.



Lock: A lock icon indicates that another user has a file checked out. You can easily see who has a file checked out by hovering your mouse over the lock icon.



Properties: Click this icon to access the **Properties** screen which displays metadata in various tabs including: **Administrative, Descriptive, Technical, Usage, Rights, Security, and History**. When viewing properties for an older PDF, the PDF opens to an **Active Preview** screen by default.



View locations: Click this icon to access the **Locations** screen, which displays all the locations to which a file is linked.



Rendition: Click this icon to access the **Renditions** screen, which allows you to view all renditions, or alternate copies of a file in various sizes and formats.



Default Rendition: Click this icon to access a default rendition, which is a rendition other than the primary rendition for previewing the file. For example, a smaller, low-resolution image is the default rendition for a larger high-resolution image file.



Virtual Document: This icon indicates that the content is a virtual document which can have several other documents nested within.



Room: Double-click this icon to view the contents of the room.



Discussion: This icon indicates that a folder has a discussion associated with it.



Ongoing Discussion: This icon indicates a message about the file has been created in a room.



Notes: This icon indicated that the folder has notes associated with it.