

# Concentra Certification Exercise - Publication



## ***Create a Publication***

Now it's your turn to work hands-on in the Concentra environment. This exercise enables you to review and practice the functionality demonstrated in your Concentra training. When you are finished, send the requested materials to the Concentra support team. Once your document ID numbers and reports are received, they will be reviewed in the Concentra system. If all steps in all parts of the exercise are completed correctly, you will receive an email confirming your Concentra Marketing Standard certification which entitles you to a Concentra production account.

If you have questions about Concentra for Marketing Standard while you are working:

- Refer to the [Concentra User Guide](#)
- Contact [ucmconcentrasupport@hp.com](mailto:ucmconcentrasupport@hp.com)

## **Register for the Concentra QA Environment**

1. Please fill out and submit the [New User Request Form](#) for access to the Concentra QA environment.

**NOTE:** If you are an external user, such as someone with an approved HP agency, please use [this link](#) and select New User Request Form (Marketing Standard) from the right side of the screen.

2. In the New User Request Form, select the following CMG's (step 4 of the form) to be registered in:

UCMP Concentra Training NonPub (cmg407)  
UCMP Concentra Training PubNum (cmg406)

If you know the CMG you will be publishing documents under, please select it as well.

3. Prior to submitting the New User Request Form, in the Optional section please indicate that you are registering to prepare for Concentra submitter training.
4. Shortly after you submit your New User Request Form, you will receive notification from Concentra Support as to the status of your request. You will likely receive a username and password to the Concentra QA environment provided no additional information is needed from you.

## Log In

Login to the Concentra QA environment with the username and password issued to you by Concentra Support. Please use the appropriate URL:

**HP employees:** <https://concentra-itg.austin.hp.com/Concentra/code/actions/home.do>

**Agencies:** <https://q5u0571-p.atlanta.hp.com/Concentra/>

**Username:** (firstname\_lastname)

**Password:** password

## Part 1 – Create and Submit a Document

1. Click Create New
2. In the New Document section, select the following values:

Property	Input
Content Class	Marketing-Standard
Content Management Group	UCMP Concentra Training PubNum (cmg406)
Workflow	Create or Modify Publication v3

3. Click Edit Properties

Enter the following metadata in the Document Properties section using the values below:

Property	Input
Title	[Your Name]
Description	"This document is created by [Your Name] - Concentra new user - for my certification."
Keywords	[Your Name], Concentra new user, Certification, Document
Document Type	Brochure
Content Type	Marketing
Organization	Imaging and Printing LES (LaserJet and Enterprise Solutions)
Language	English (U.S.)
Region	Worldwide

4. Enter the following metadata in the Publication Numbered Documents section using the values below:

<b>Property</b>	<b>Input</b>
Publication Flag	Check Flag
Pub Media	Document
Page Count	2
Page Size	US Letter (8.5/11)
Pub Manager	raghunandan_kumar (rvk@hp.com)
Pub Controller	raghunandan_kumar (rvk@hp.com)
Print Management Program Check box	US and Canada Collateral
Inventory Policy	inventory and web
Order Limit	400
Initial Reorder Point	100
COP Print Quantity	0
Unit of Issue	Each (Default) a single piece of literature or other material
Sending Initial Shipment	Check to specify initial shipment
Arrival Quantity	350
Arrival Date	A week from today's date

5. Enter the following metadata in the Authors, Versions and Sources section using the values below:

<b>Property</b>	<b>Input</b>
Add Author	ucmconcentrasupport@hp.com  Enter this e-mail address in the field next to <i>Other Author</i> and click <i>Add</i> .

6. Enter the following metadata in the Publishing Disclosure and Schedule section using the values below:

<b>Property</b>	<b>Input</b>
Disclosure Level	Public
Release Schedule	Enter dates for HP, Partners and Customers from today (current date) to current date + 5 months
Review Date	One week from today (current date)

7. Enter the following metadata in the Products Services and Solutions section using the values below:

Property	Input
Products, Services and Solutions	Search “laserjet 4350” and Select “HP LaserJet 4350 Printer Series”
Product Level	Series

8. Enter the following metadata in the Programs, Segments and Accounts section using the values below:

Property	Input
Customer Segments	Enterprise

9. Click Save and Go to View Document.

In the Content section of the Document Properties page, click Add Content and upload: high res, low res and zip files (see below the format) placed under C:\ drive\documentum

Use either:

### Web File Upload

and load the 3 below files in 1 shot: click on Browse button (see below) and select the files one by one, then click on Begin Up-load of Selected Files (see below) button

filename.hires.pdf (example 4AA1-0807ENA.hires.pdf)

filename.pdf (example 4AA1-0807ENA.pdf)

filename.zip (example 4AA1-0807ENA.zip)

**Initial Content Upload**

Please click the radio button to select the file(s) you would like to upload. Authorize the applet to automatically upload the file(s) being checked in.

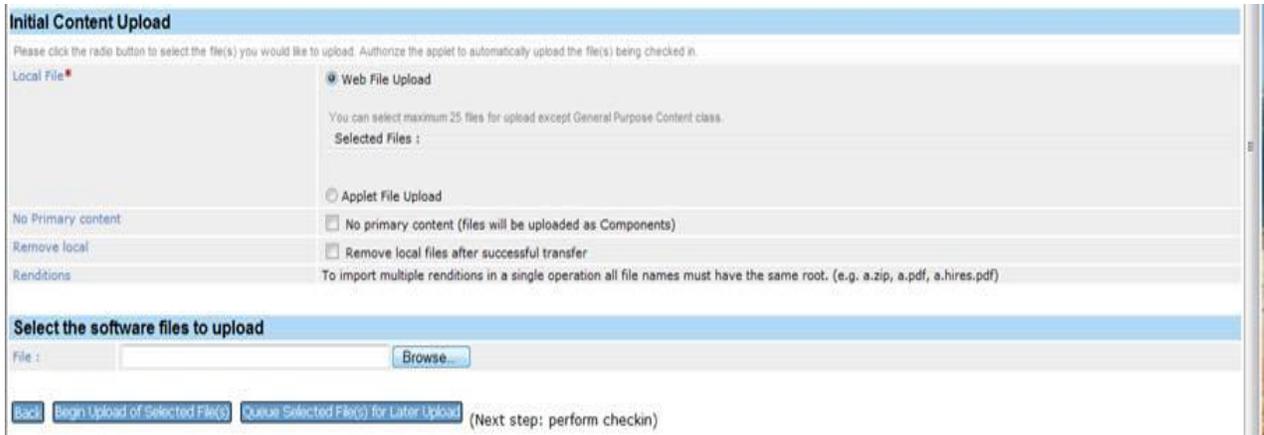
Local File\*  Web File Upload

Applet File Upload

No Primary content  No primary content (files will be uploaded as Components)

Remove local  Remove local files after successful transfer

Renditions To import multiple renditions in a single operation all file names must have the same root. (e.g. a.zip, a.pdf; a.hires.pdf)



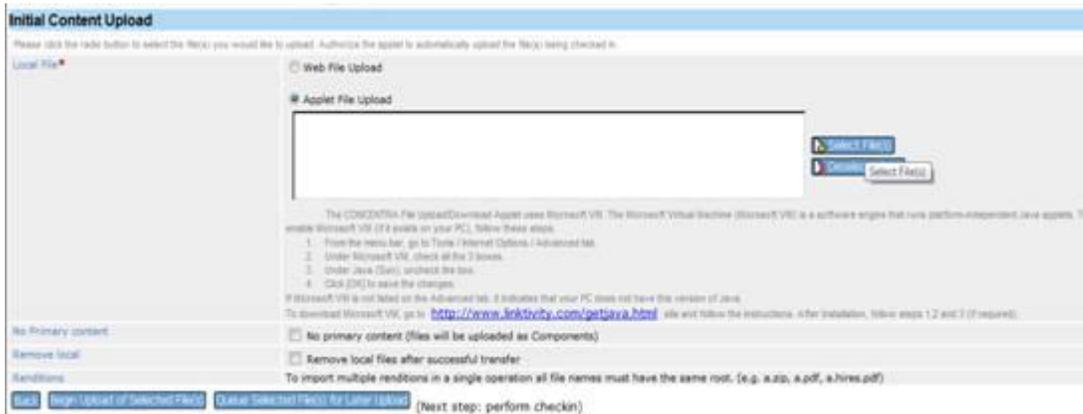
## OR Applet File Up-load

Load the 3 below files one by one: click on Select Files button and load one by one: first high res, then low res and then zip

filename.hires.pdf (example 4AA1-0807ENA.hires.pdf)

filename.pdf (example 4AA1-0807ENA.pdf)

filename.zip (example 4AA1-0807ENA.zip)



then click on Begin Up-load of Selected Files button

**NOTE:** Any pdf files on your desktop or laptop computer will work for this exercise. The files must be located in a folder off the root directory (C:\ drive).

If you have a folder labeled “documentum”, place your sample filename.hires.pdf and filename.pdf files in that folder. If not, create a folder and give it any title you wish. Place your sample files in this folder.

- Complete the document submission. Click Complete Task in the Current State window. In the Request Confirmation pop-up window, enter *For certification exercise* and click Submit. This will move your document to an IR (in review) state.

- Email **ucmconcentrasupport@hp.com** with the subject line: *Part 1 – Certification Exercise*. Alert them that your document is ready for review.  
Please include the publication number of your document for reference.  
After review, and if there are no corrections needed, the document will be moved to a FINAL state.

## Part 2 – Move Document to WIP

- An e-mail notification will be sent to you by Concentra once your document is moved to FINAL.
- Locate your document by its publication number using the Object Name search function in the upper right portion of the screen.
- From the results page, open the document by clicking on its title to proceed to the Document Properties.
- Move your document to a WIP status by clicking on Create WIP in the Actions section.

## Part 3 – Modify Meta Data

- Modify the meta data of the newly created WIP document by entering a the following.

Property	Input
Scrap previous inventory	Yes
Print Management Program	<i>Do not change any settings</i>
Release Schedule Dates	Enter dates for HP, Partners and Customers 1 week from today (current date) to current date + 5 months
Review Date	2 weeks from today's current date

- Click Save and Go To View Document.
- Add a comment to the History of your document. Enter *your name* and *today's date* for the comment.
- Submit the WIP document to the workflow by clicking Complete Task and email **ucmconcentrasupport@hp.com** to let them know that your document is ready for review. Use the subject line: *Part 2 and 3 – Certification Exercise*.  
Please include the publication number and version number of your WIP

document for reference. After review, and if there are no corrections needed, the document will be moved to a FINAL state.

#### Part 4 – Copy Document

1. For your document, click Copy Document in the Actions section.
2. Uncheck *Create one or more copies in the same collection*.
3. Under Content, select Copy properties and content.
4. Click *Edit Properties*.
5. In the Description of the newly copied document, enter *This is a copy of another document*.
6. Select a Print Management Program and set the Inventory Policy to *POD for all*.
7. Click *Save and Go to View Document*.
8. Submit this WIP document to the workflow by clicking Complete Task and email **ucmconcentrasupport@hp.com** with the subject line: *Part 4 – Certification Exercise* and let them know that your document is ready for review. Please include the publication number and version number of your WIP document for reference. After review, and if there are no corrections needed, the document will be moved to a FINAL state.

#### Part 5 – Advanced Search

1. From the Concentra Home Page, click Search in the Document section.
2. Run a Search with the following criteria:

Property	Input
Content Class	Marketing Standard
Content Management Group	UCMP Wirestone PubNum (cmg182)
Document Type	data sheet
Document State	FINAL

Expand Advanced Options and enter the following criteria.

Property	Input
Creation Date	Select <i>is later than</i> .  Enter the date 01, Jan, 2009

3. Click Search and wait for the search results.
4. Export your search results to an Excel file.
5. Run another search with some of your own search criteria. Be sure you choose *Marketing Standard* for Content Class. Specify the criteria filters that you chose Property and Input (like the above) and include them in the e-mail sent to UCM.
6. Export your search results to an Excel file
7. Attach both Excel documents to an email and send them to **ucmconcentrasupport@hp.com** with the subject line: *Part 5 – Certification Exercise*.

### **Part 6 – Abort a WIP**

1. Make a copy of your first document created at **Part 3**. (write down document number and version of the copy)
2. Go to personal Inbox
3. Abort the copy
4. Send an email and send them to **ucmconcentrasupport@hp.com** with the subject line: *Part 6 (document ID number and version number of the copy) – Certification Exercise*.

### **Part 7 – Up-load file using rendition**

1. Search you first document created at **Part 3**.
2. Create a WIP version
3. Remove the existing zip file (click on X next to it)
4. Up-load a new zip file using Rendition  
filename.zip file (example 4AA1-0807ENA.zip) placed  
under C:\ drive\documentum
5. Save the up-dates
6. Click Complete Task
7. Send an email to **ucmconcentrasupport@hp.com** with the subject line: *Part 7 (Up-load file using rendition) – Certification Exercise*.

Please include the document ID number and version number

## Part 8 – Extend expiry dates to Max

1. Search you first document created at **Part 3**.
2. Create a WIP
3. Go to Release Schedule and extend Expiry dates for HP, Partners and Customers to Max (Maximum lifecycle)
4. Save the updates
5. Click Complete Task
6. Send an email and send them to **ucmconcentrasupport@hp.com** with the subject line: *Part 8 (Extend expiry dates) – Certification Exercise*.

Please include the document ID number and version number

## Part 9 – Archive document

1. Search you first document created at **Part 3**.
2. Create a WIP
3. Go to Release Schedule and enter current day to Expiry dates for HP, Partners and Customers
4. Save the updates
5. Click Complete Task
6. Send an email to **ucmconcentrasupport@hp.com** with the subject line: *Part 9 (Archive document) – Certification Exercise*.

Please include the document ID number and version number

## Final Review

A final review will take place with Concentra Support of all submitted documents and reports. If no corrections or further instructions are required, your user account will be activated for the Concentra production environment.

## Questions

Remember, if you have questions about Concentra for Marketing Standard at any point over the course of this certification exercise, please do the following:

- Refer to the [Concentra User Guide](#)
- Contact [ucmconcentrasupport@hp.com](mailto:ucmconcentrasupport@hp.com)