Power & Water Customer Collaboration Documentum:

Navigation and Working With Files

Basics

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Module Objectives:

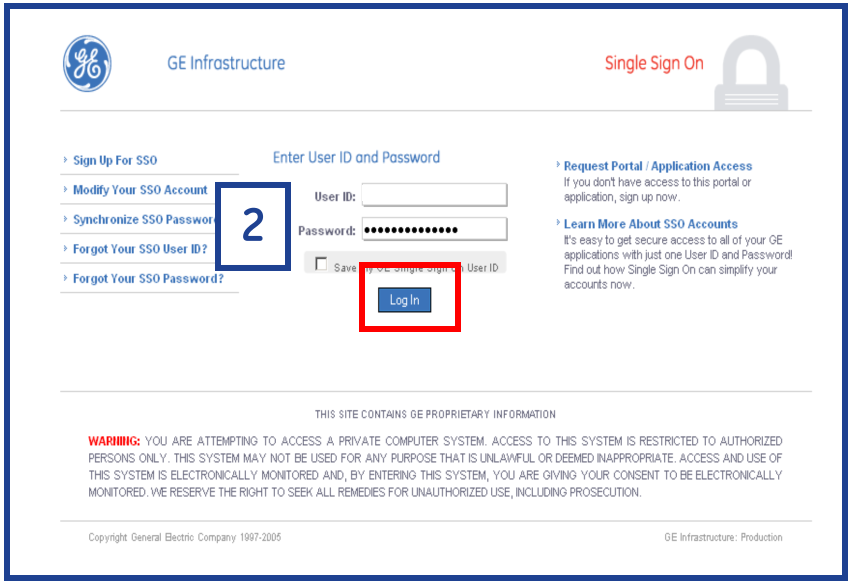
1. Basic Navigation
2. Use “Import” to Save Files in Project Folders
3. Use “Export” to Save Files to Local Drive
4. Read Files
5. Revise for Version Control of Files
   - Perform one time setup for Check Out / Check In
   - Check Out and revise files
   - Check In to ‘overlay’ revised file ‘over’ old version
6. Review File Versions
7. Use “Edit” to ‘Lock’ and Immediately Edit File
8. View File History

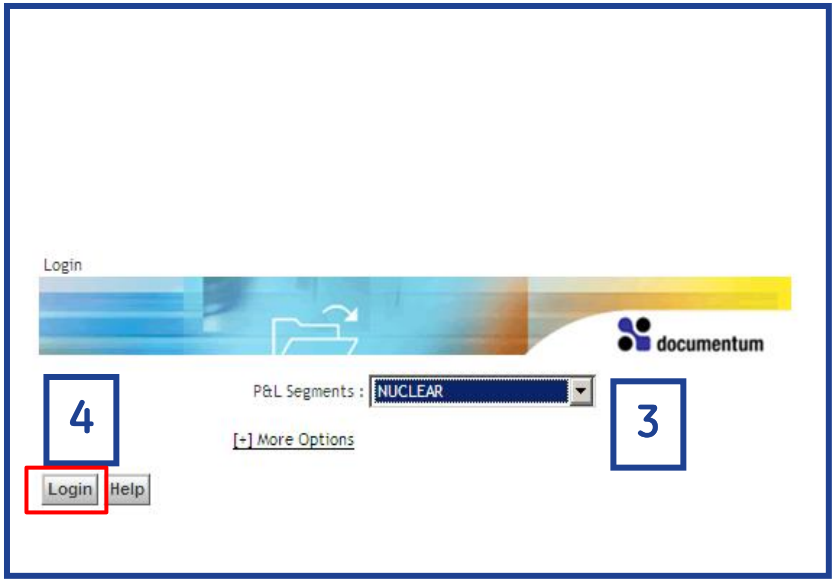
Basic Navigation:

- Login - Access Project
- Review Workspace
- Review Home Page
- Use Project List
- Review Navigation Tree
- Modify Preferences
- Perform Searches
- Subscriptions
- Notifications for Subscriptions
- Using Your Inbox

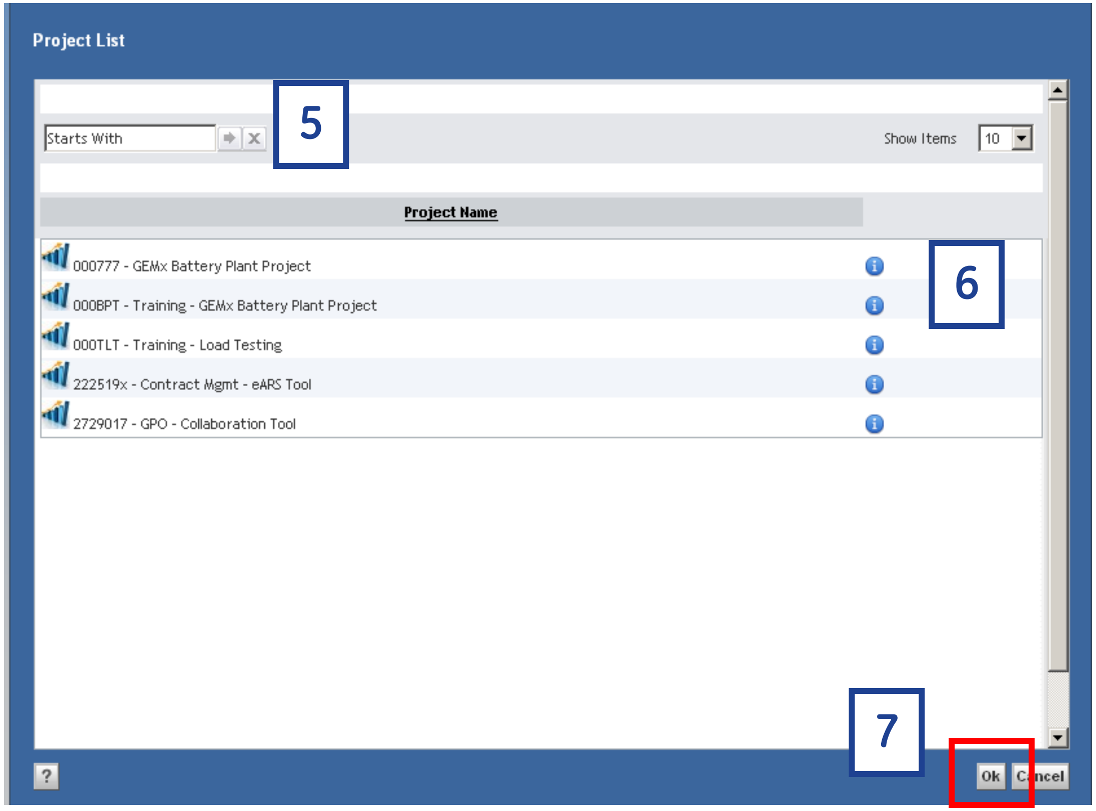
Login and Access Project

1. Click link for Energy Customer Collaboration Documentum: https://collaborationspace.ge-energy.com/pweccollab/
2. Enter SSO and Password, click "Login"
3. Select "P&L Segment" drop-down to click business owning project you want to access
4. Click "Login"





Login and Access Project



5. Use “Starts With” field to search for project. *Change the number of items loaded on a page in the “Show Items” box
6. Select (highlight) your project
7. Click “OK” in bottom right of window

Review Workspace

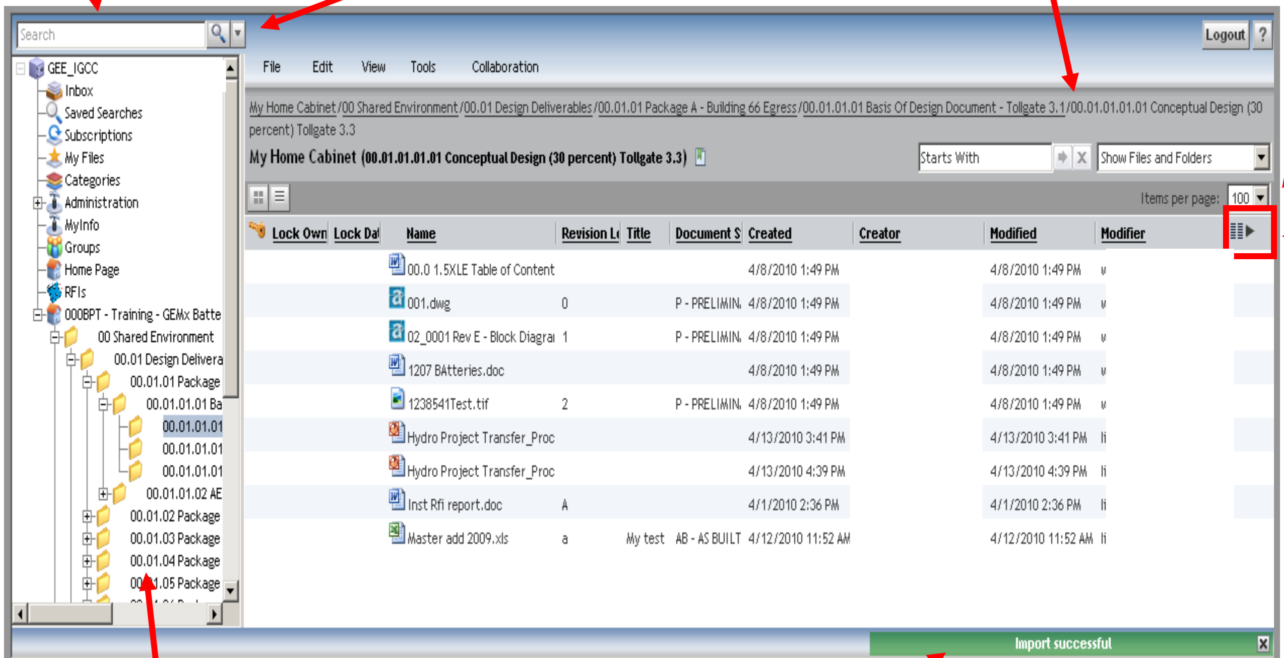
Search Field

Advanced Search Arrow

Navigation path or 'breadcrumbs' to selected folder

Items per page drop-down

Preferences button for customizing workspace columns



Workspace – with documents from selected folder displayed

Navigation Tree – with folders for selected project displayed

Status Bar – with message displayed

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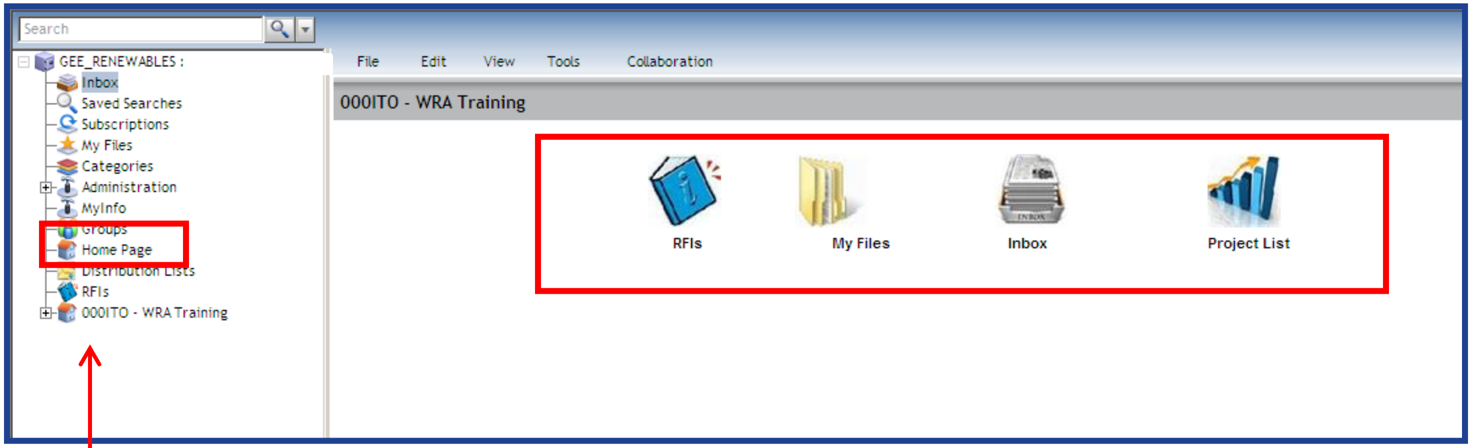
Review Home Page



To access, select "Home Page" in Navigation Tree

Home Page Icons:

<u>RFI's</u> – Log of all RFI's in selected project

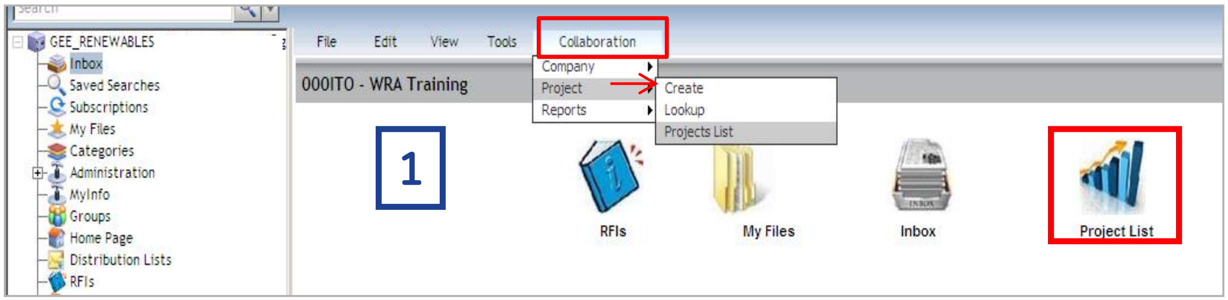
<u>My Files</u> – 7 day history of your imported, exported, or edited documents. Includes commented RFIs and list of all locked documents

<u>Inbox</u> – Location for acting on all tasks assigned to you, across all projects you are associated with

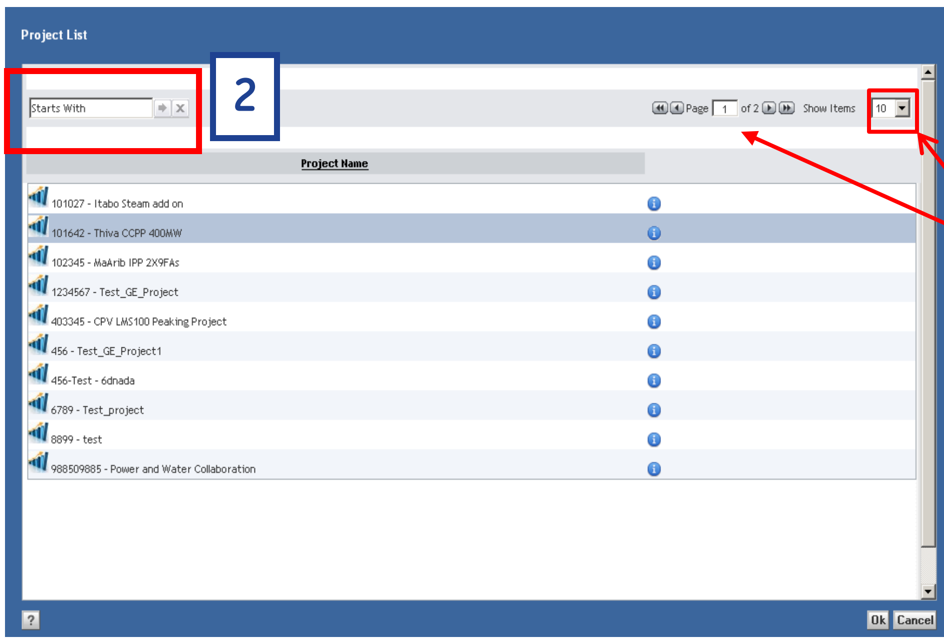
<u>Project List</u> - Opens Project List window to search for and select a different project to display in Navigation Tree

Use Project List

To Access a Different Project

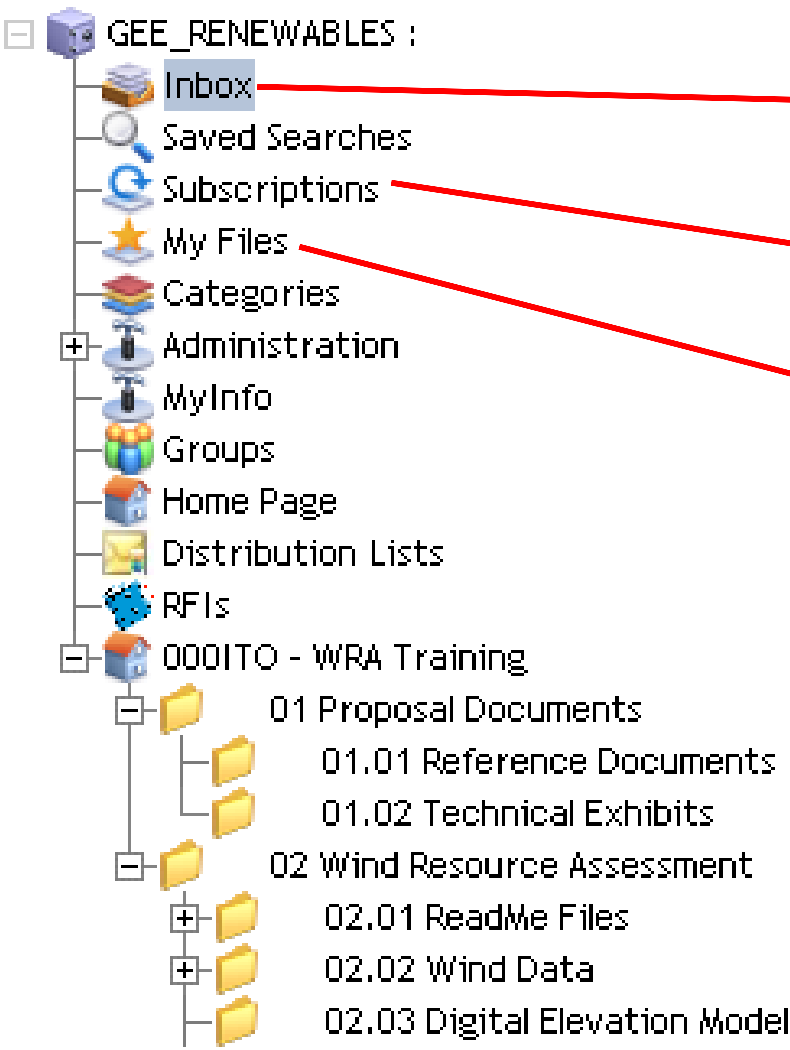


1. On Home Page, click "Project List" icon or, choose "Collaboration", "Project" then "Project List" from any window
2. Use "Starts With" field to search for project*
3. Select project in list and click "OK" in bottom right of window



* If project list contains multiple pages, use arrows to view additional pages or you may change the number of items per page.

Review Navigation Tree

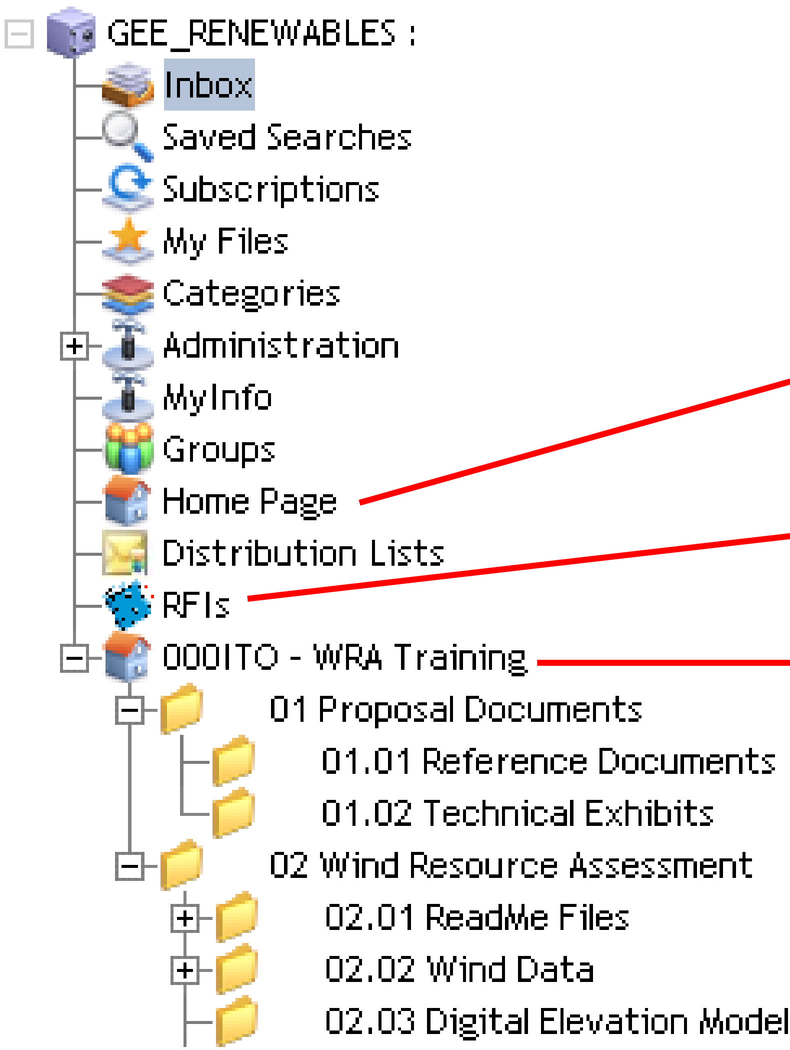


<u>Inbox</u> – Location for *all* tasks assigned to you, across *all* projects in business segment

<u>Subscriptions</u> – A 'favorites' list of folder and file shortcuts.

<u>My Files</u> – 7 day history of your imported, exported, or edited documents. Includes commented RFIs and list of all locked documents

Review Navigation Tree



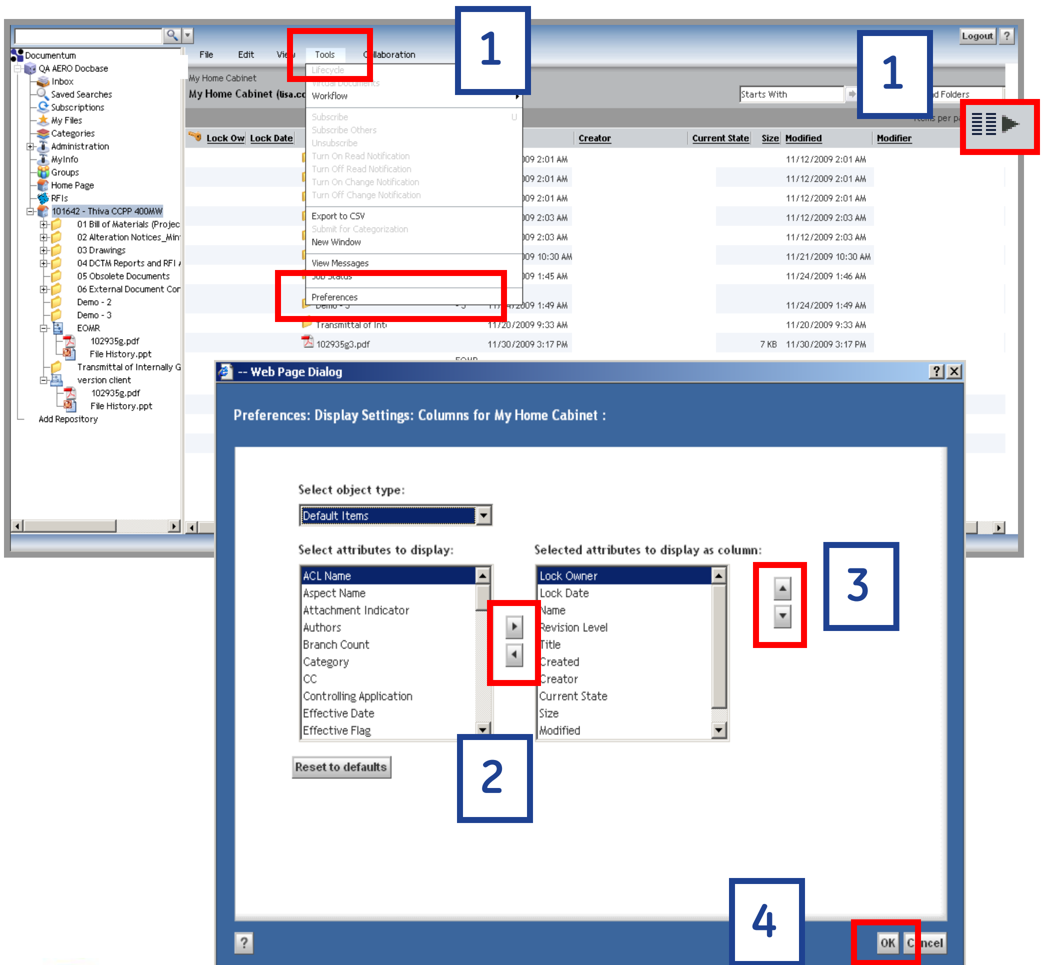
Home Page – Initial page displayed when a project is loaded. Contains the shortcut menu icons (including "Project List")

RFI's – Log of all RFI's in selected project (based on access level security)

Project Name of project currently accessed

Modify Preferences

Customize Workspace Columns



Open and use Column "Preference" Window:

1. Click icon in right end of the column area or Click "Tools" menu, select "Preferences" then "Column" tab
2. In the "Preferences" window, add or remove column header attributes to display: highlight attribute; select center arrows to include or remove
3. Re-order column header attributes: highlight attribute; select right side arrows to move up or down
4. Click "OK"

<u>In Workspace</u>:

-Click column name to order it alphabetically or numerically

-Place and hold mouse on column border to size accordingly

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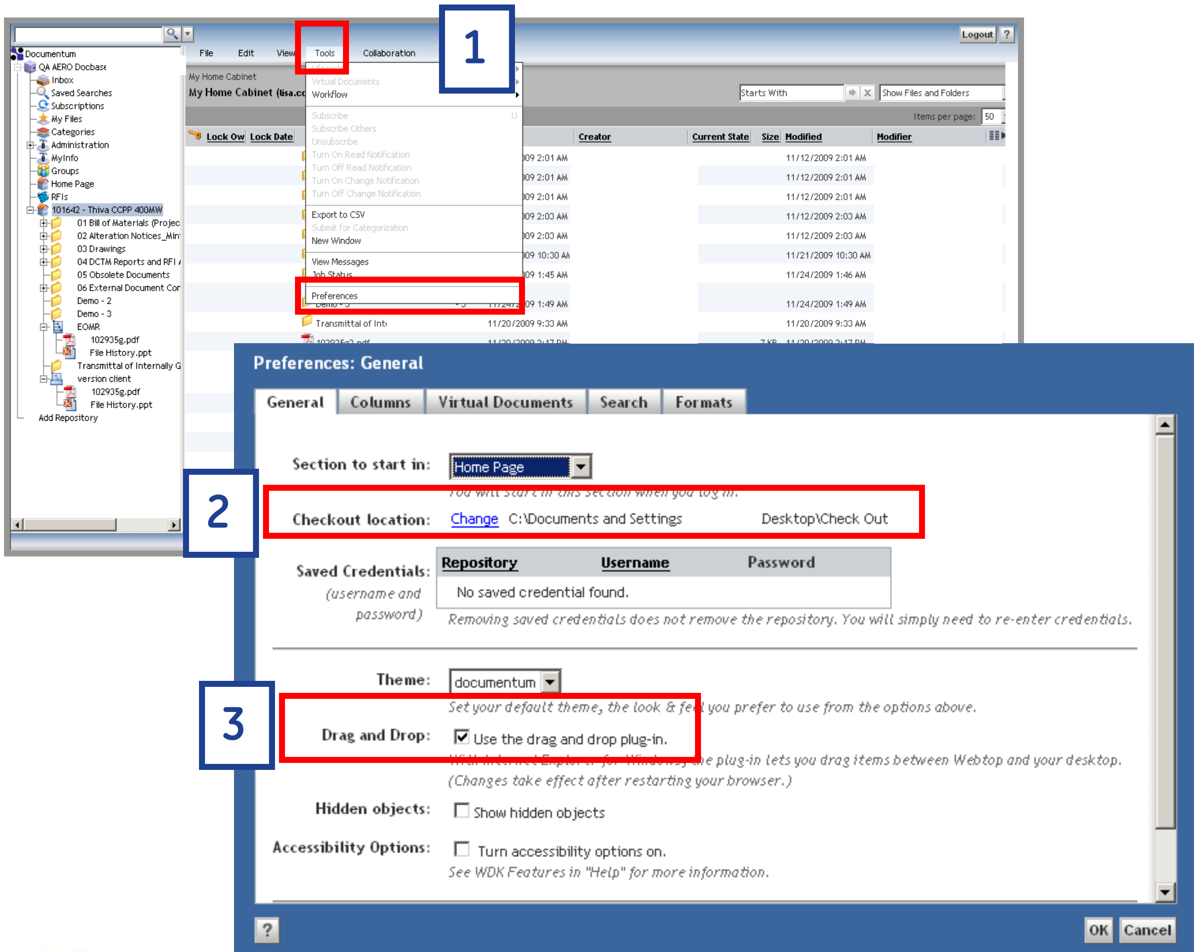
Modify Preferences

General Tab for Checkout and Drag and Drop



Open and use General "Preference" Window:

1. Click "Tools" menu, select "Preferences" then "General" tab
2. Modify "Checkout Location": click "Change" then navigate to your personally created folder on local drive to change the default location of your "Checkout" folder.
3. Select "Drag and Drop" which when "checked" enables you to drag files from local drive into a Documentum project folder

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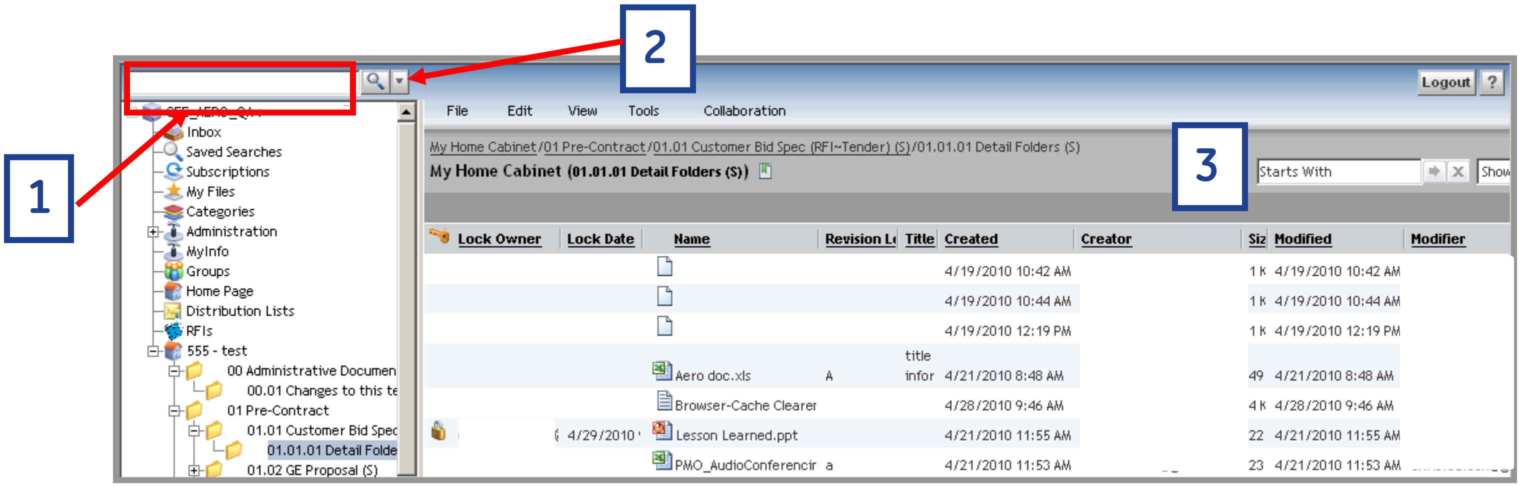
Perform Searches

<u>Basic Search</u>: search by key word in name across entire accessed project
<u>Advanced Search</u>: conduct a more complex search across entire accessed project
<u>Workspace Search</u>: key word search only of content displayed in workspace



1. Basic Search: Initiate using Search field in upper left corner, click 'Magnifying Glass'
2. Advanced Search: Initiate by clicking 'Arrow' next to 'Magnifying Glass' button
3. Workspace Search: Initiate using "Starts With" field in upper right of Workspace

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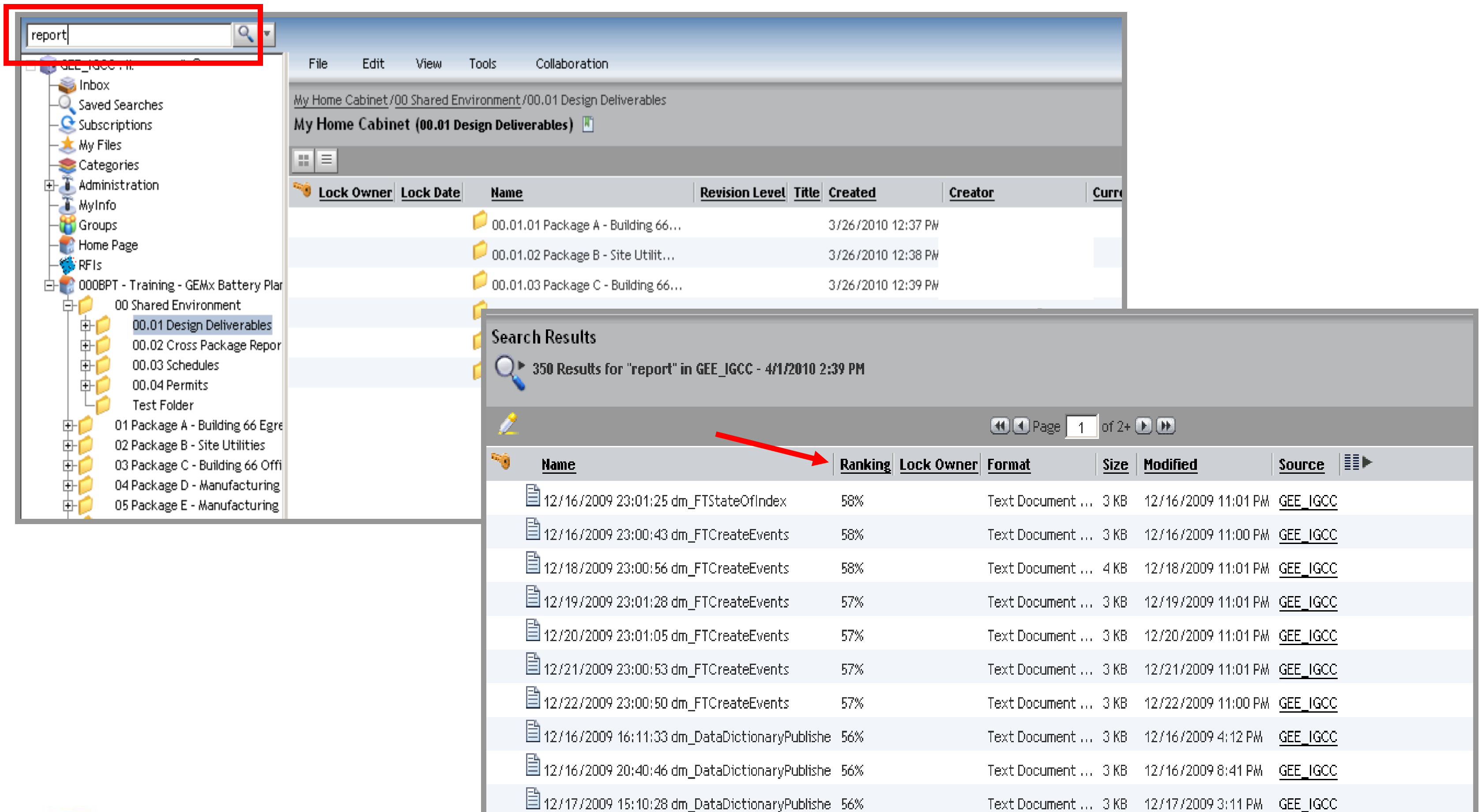
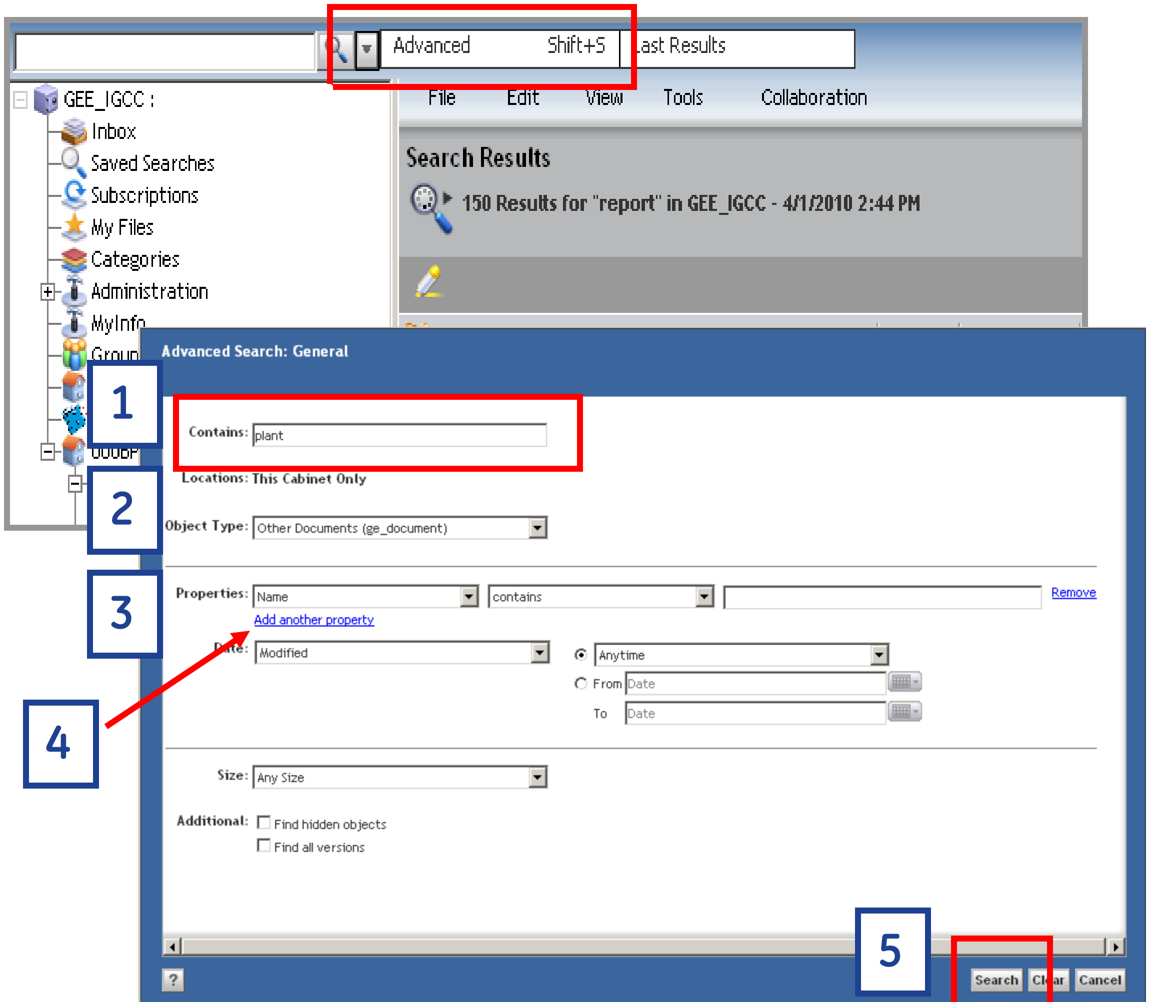
Perform Basic Search

Search field in upper left of window queries file and folder names, returning ranked results in workspace



Perform Advanced Search

Click “Arrow” (next to upper left search field) to open “Advanced Search” window.

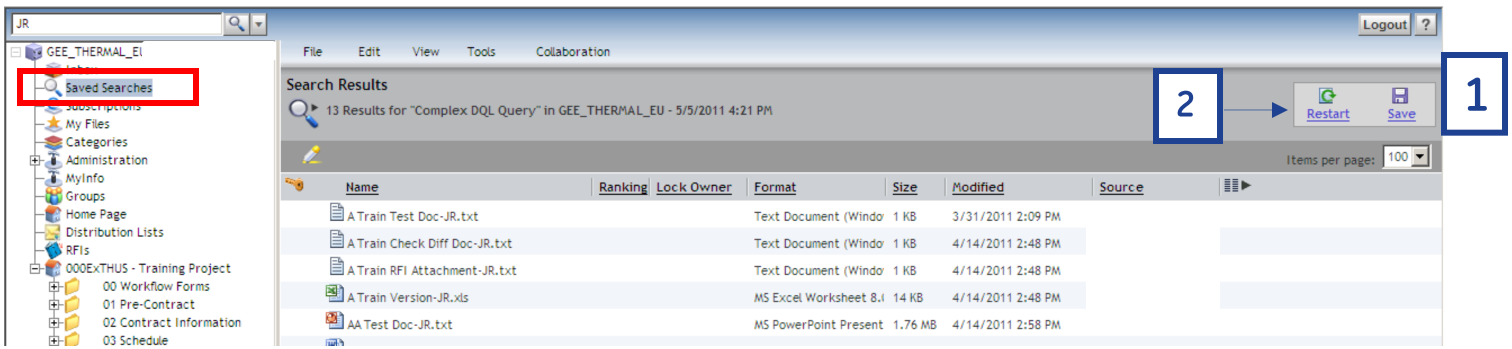


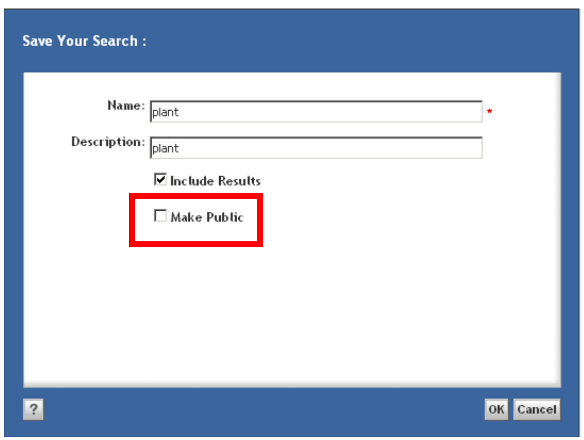
1. Enter key word in “Contains” field. You can use this field to search document content.
2. Select “Object Type” from drop-down. “Other Documents (ge_documents)” will include all documents in the project.
3. Use “Properties” drop-downs to select other search criteria
4. Click “Add Another Property” link to add additional criteria to further refine search
5. Click “Search”

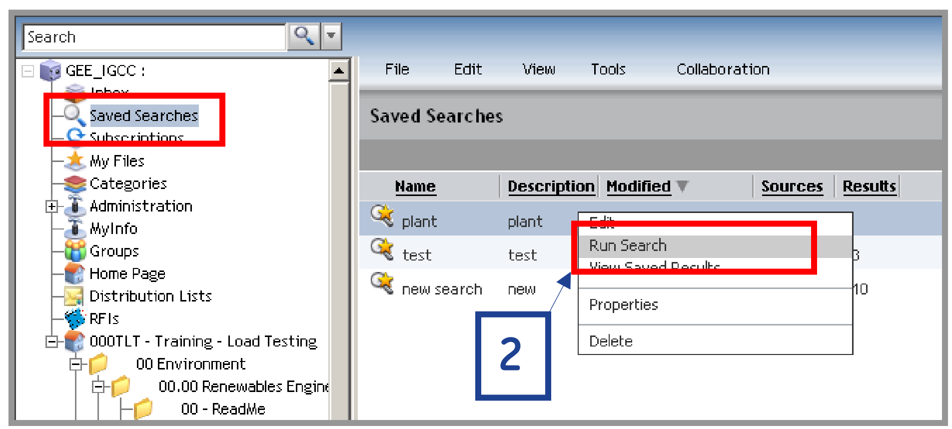
Working with Searches

1. Save a search: click the “Save” icon after running a search*
2. Restart a saved search for ‘up to date’ results: select the search, right click and choose “Run Search” or select and open (double click) a saved search and click the “Restart” icon.

*Click “Saved Searches” node of Navigation Tree to locate your saved searches



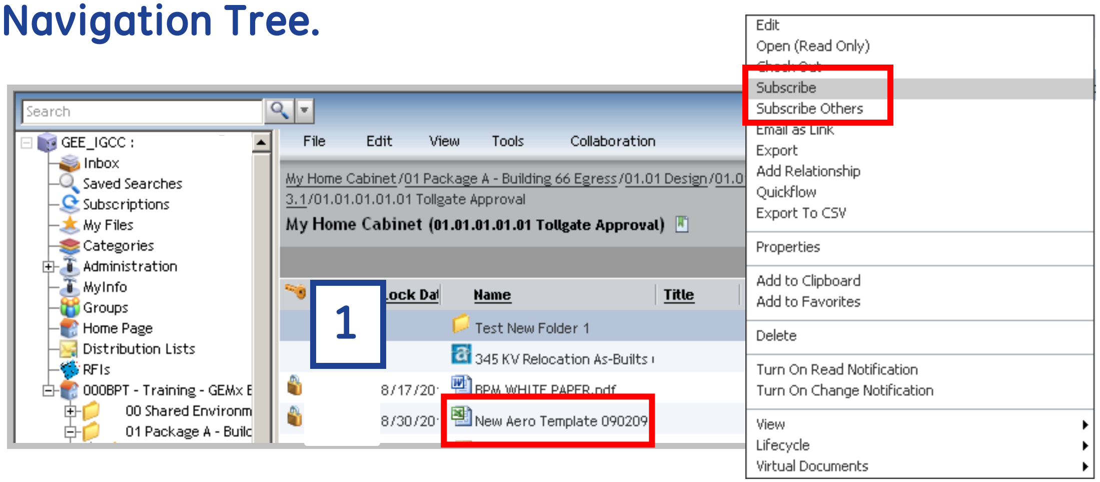




*Saved Searches can be made “Public” so colleagues can access and run them.

Subscriptions

Subscriptions are used as short cuts (similar to Internet Favorites) to navigate quickly to frequently accessed project folders or files. They are saved in the "Subscriptions" node of Navigation Tree.

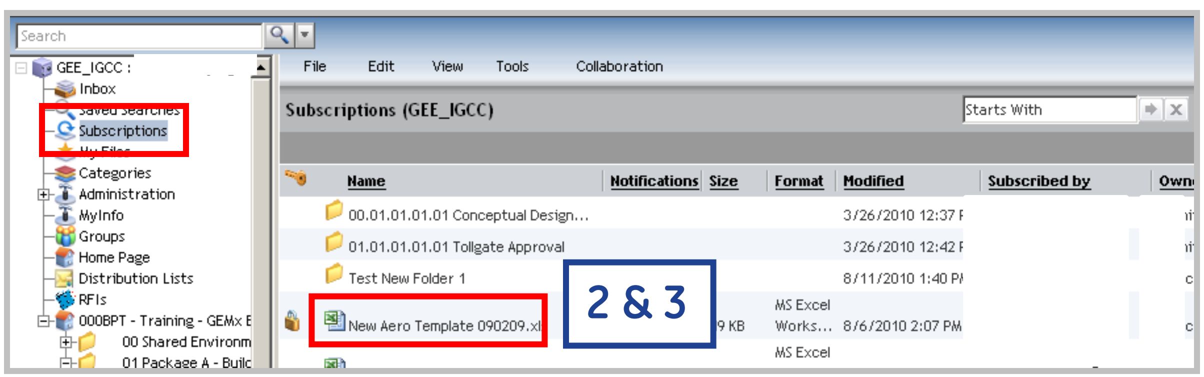


To Subscribe*:

1. Select folder or file in workspace, right-click and select "Subscribe" from menu

2. Folder or file will be available in the "Subscriptions" node of Navigation Tree

3. Select "Subscriptions" to access all subscribed objects across projects within a business segment



*** One can also "Subscribe Others" to folders and files, placing the item into their "Subscription" node.**

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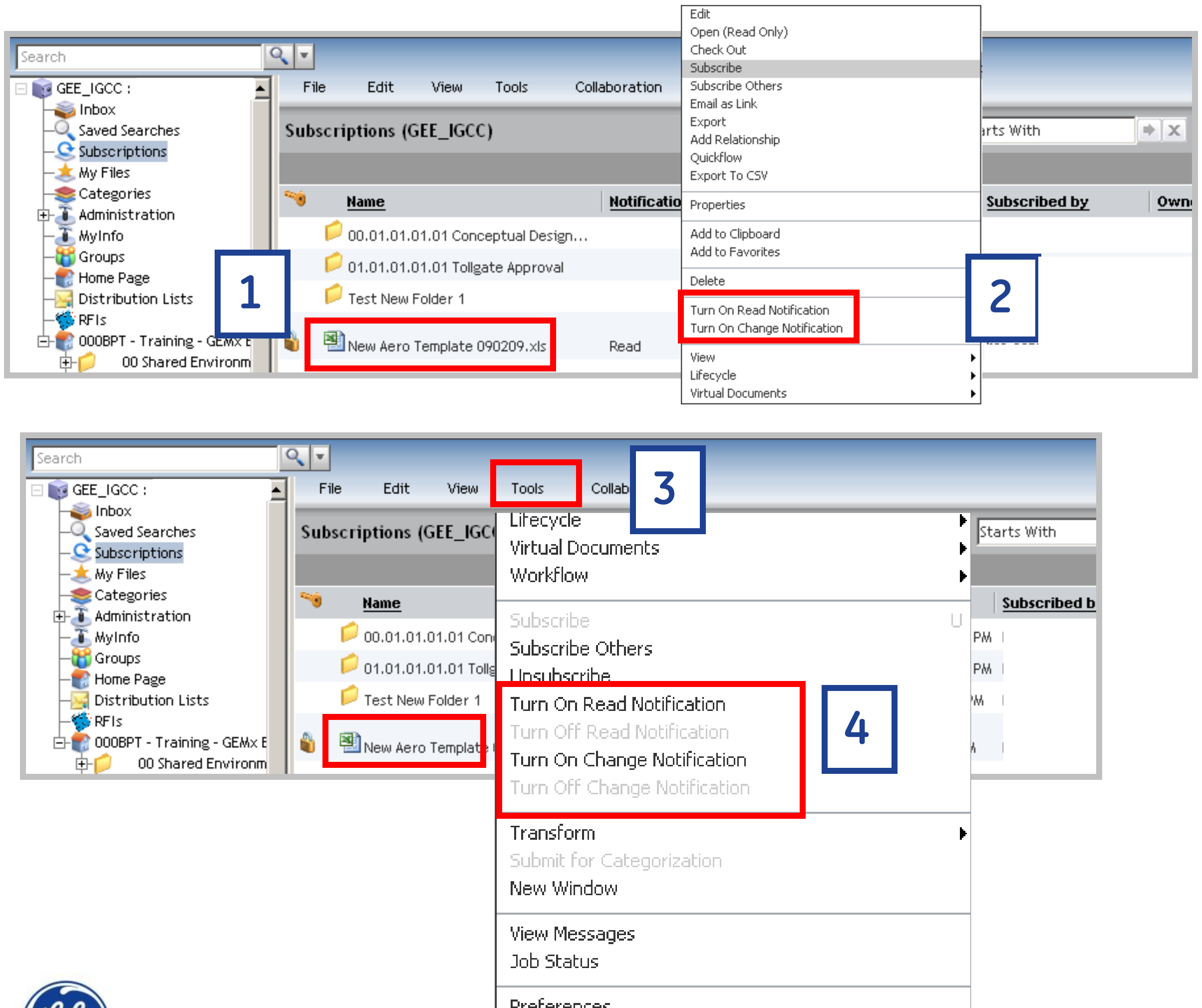
Notifications for Subscriptions

One can set “Read” and “Change” Notifications for Subscriptions. Notifications generate an ‘alert’ that is sent to <u>both</u> Documentum “Inbox” and personal email Inbox (example: Outlook).



To set Notifications:
1. Select a subscribed object, and right-click
2. Choose “Turn On Read Notification” and/or “Turn On Change Notification” or
3. Select a subscribed object, click “Tools” menu
4. Choose “Turn On “Read” and/or “Change” Notification.

<u>Read</u>: sends alert when someone opens (views) or exports the file
<u>Change</u>: sends alert when someone checks out, check in or changes the file or folder in some manner

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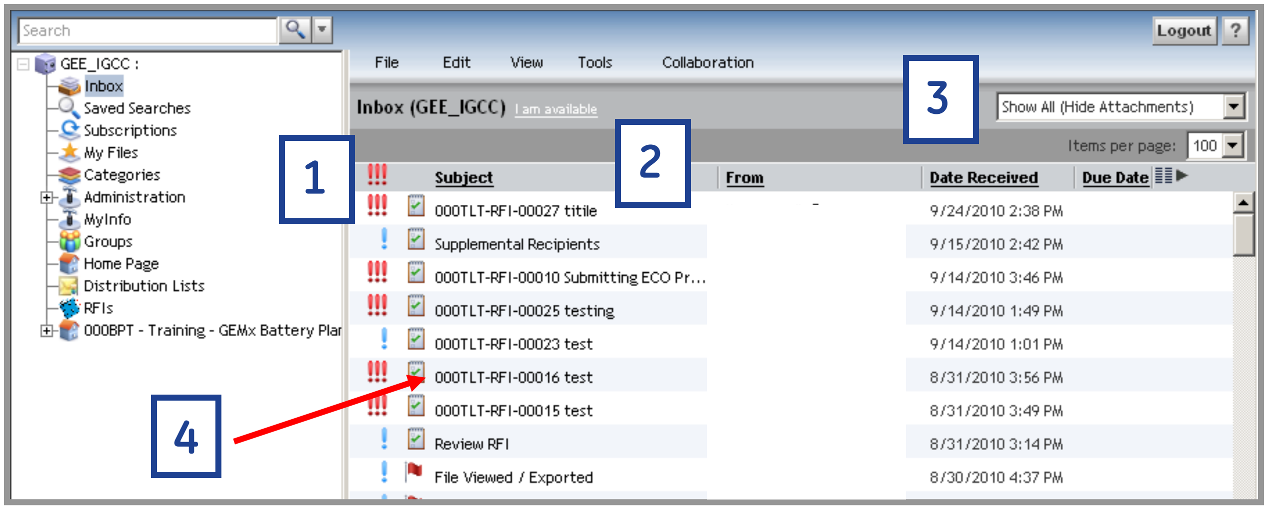
Using Your Inbox

All tasks assigned to you and all alerts set by you, across all of your projects within the Business Segment are listed in the "Inbox" (not associated with an email Inbox).



*Specific information about each type of Task is covered in separate Training Modules.

1. Urgency of item labeled by "!", "!!", or "!!!"; with "!" being least and "!!!" being most urgent
2. Items can be sorted by clicking column names
3. Types of items displayed in Inbox can be changed by "Show…" drop-down.
4. Tasks related to workflows are labeled with project name in Subject (example shown: "000TLT-RFI…")

*A task can be acted upon by selecting and double clicking to open

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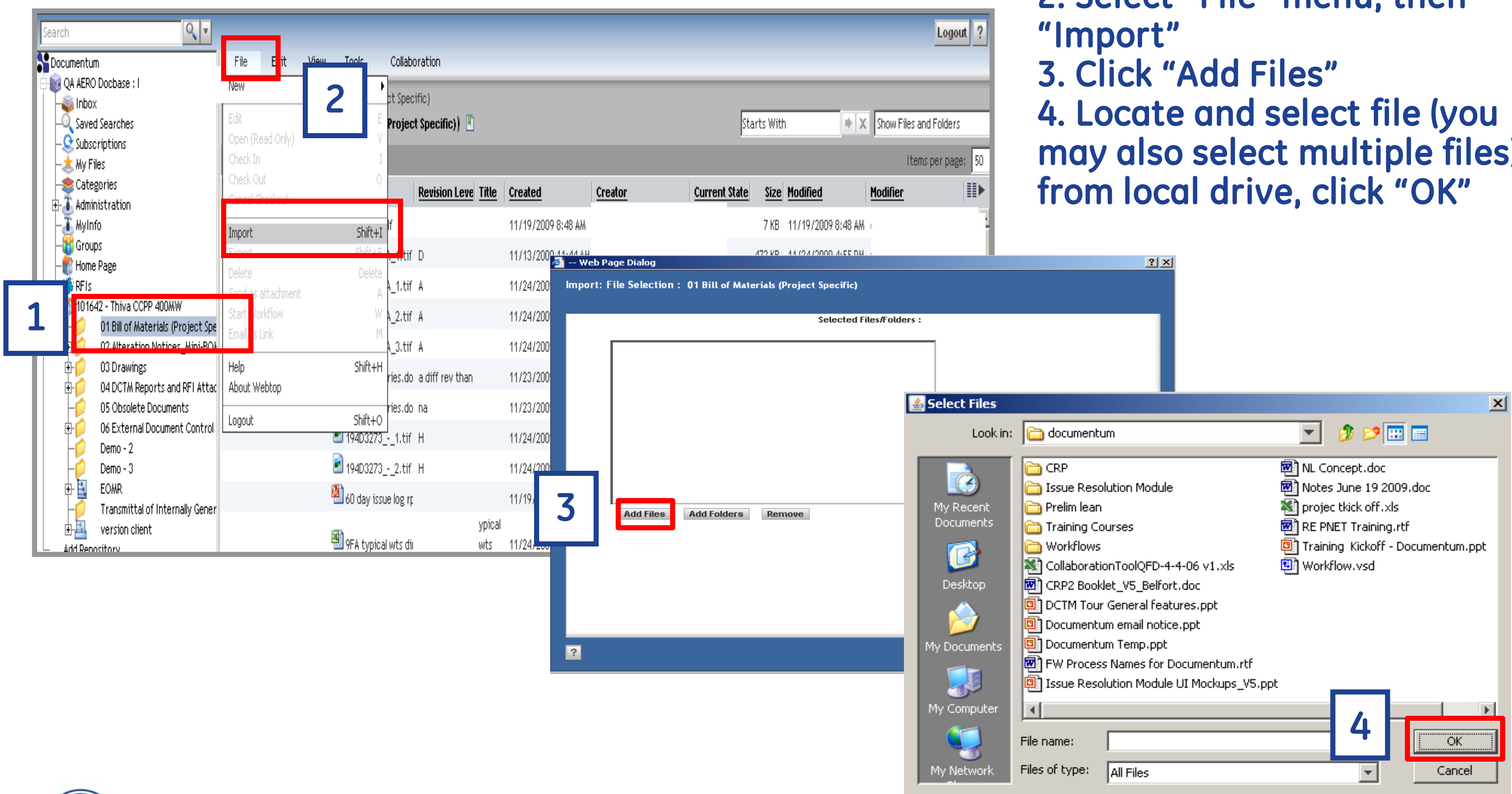
Using Import

Bring in Files from Local Drive

1. Select folder, where files will be Imported
2. Select “File” menu, then “Import”
3. Click “Add Files”
4. Locate and select file (you may also select multiple files) from local drive, click “OK”



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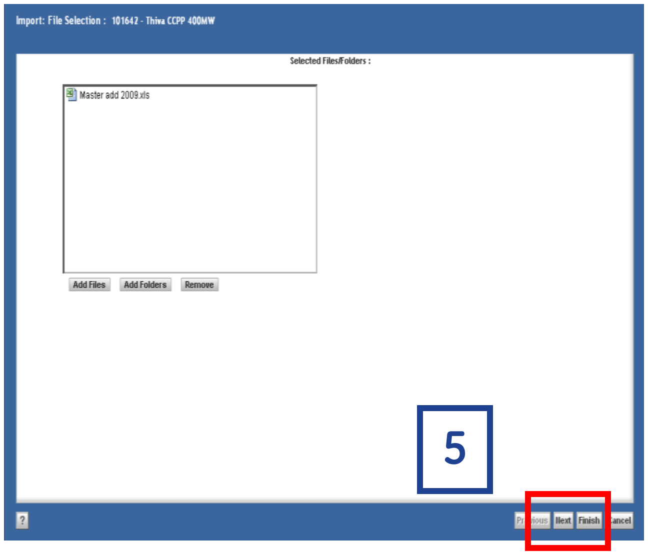
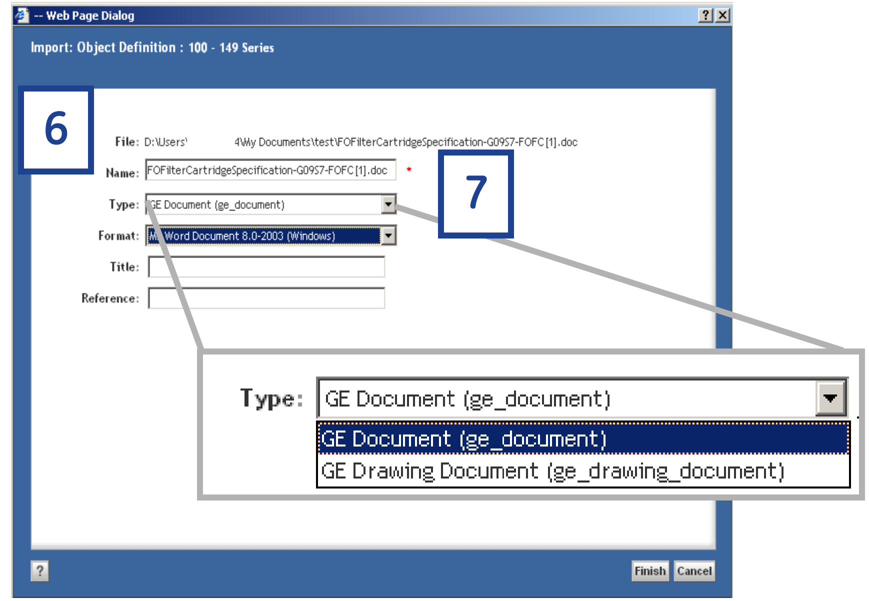
Using Import

Select File "Type"



5. Click "Next" to go to attribute screen
6. Retain or change file "Name"
7. Select file "Type" drop-down



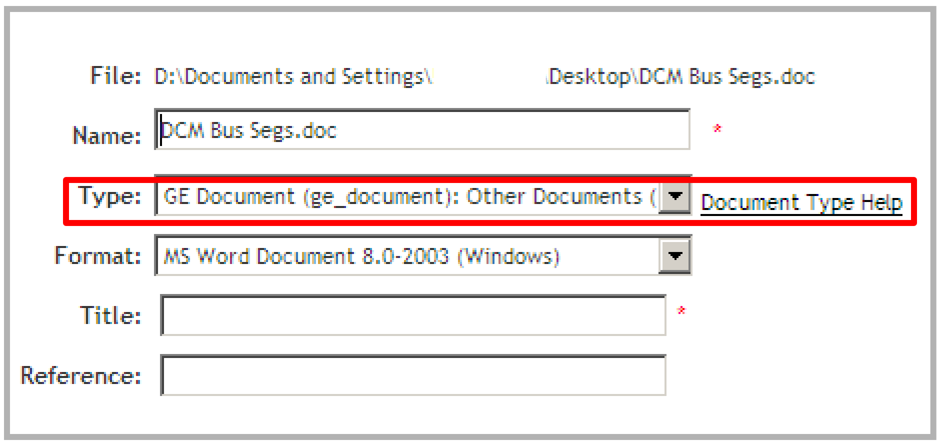
<u>File Types</u>:
ge_document: typically for non-version controlled files, non drawings/specifications with minimal attributes (file meta-data) required

ge_drawing_document: typically used for GE drawings or specifications that <u>ARE</u> version controlled. More attributes (file meta-data) are required and associated with file.

Using Import - File "Type" Fields

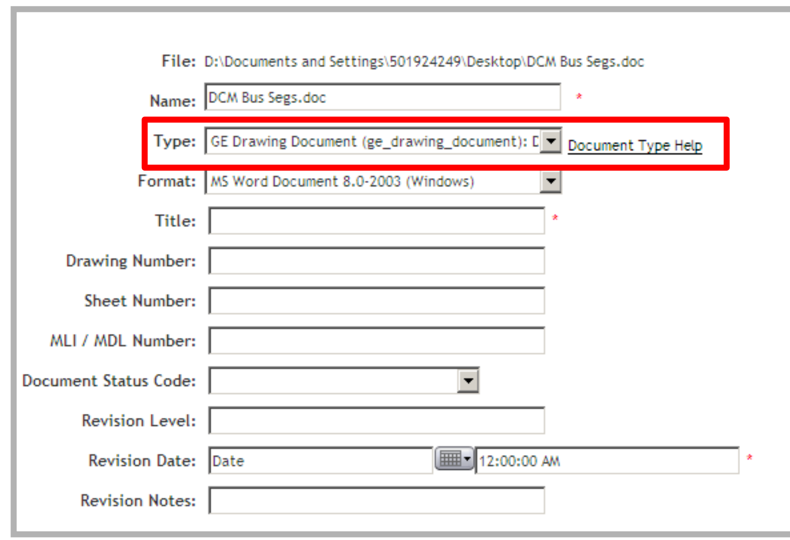
ge_document (or Other Documents)

Name – mandatory
Type – auto populates
Format – auto populates
Title – mandatory
Reference - optional



ge_drawing_document (or Drawing or Specification)

Name – mandatory
Title – mandatory
Revision Date – mandatory
*All other fields are optional



*To maintain document version control, follow Check Out/Check In procedures for creating versions (revisions).

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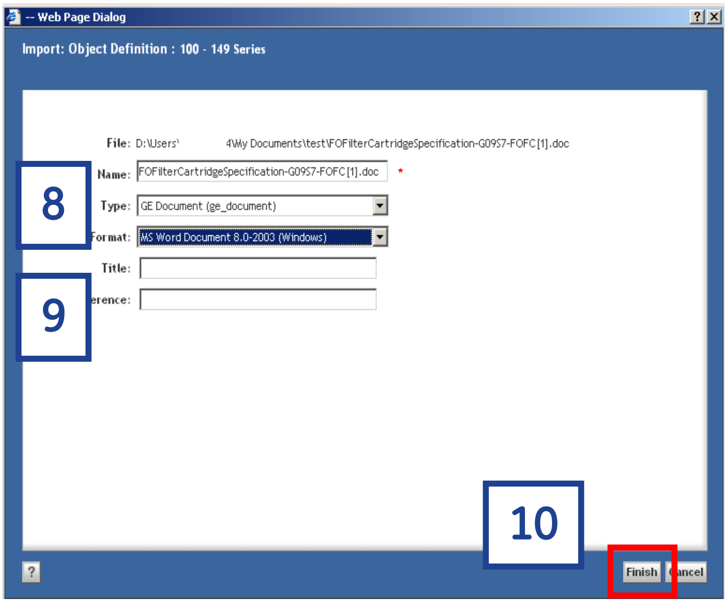
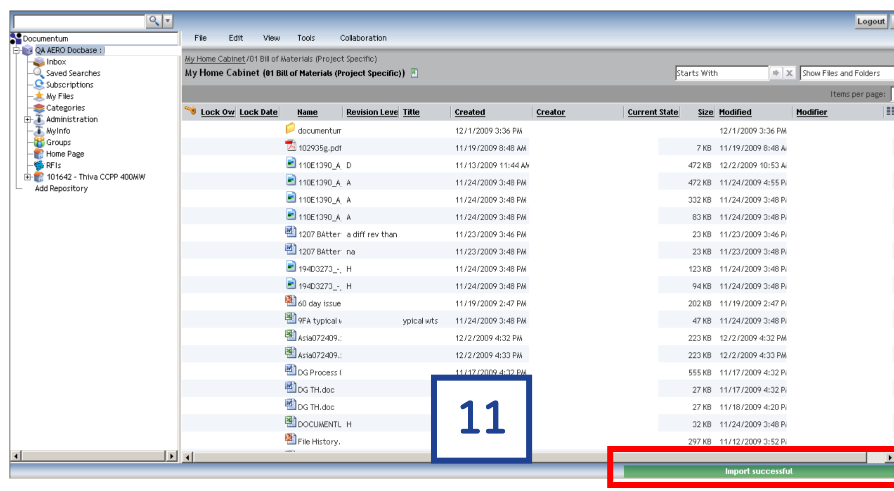
Using Import

Select File “Format”



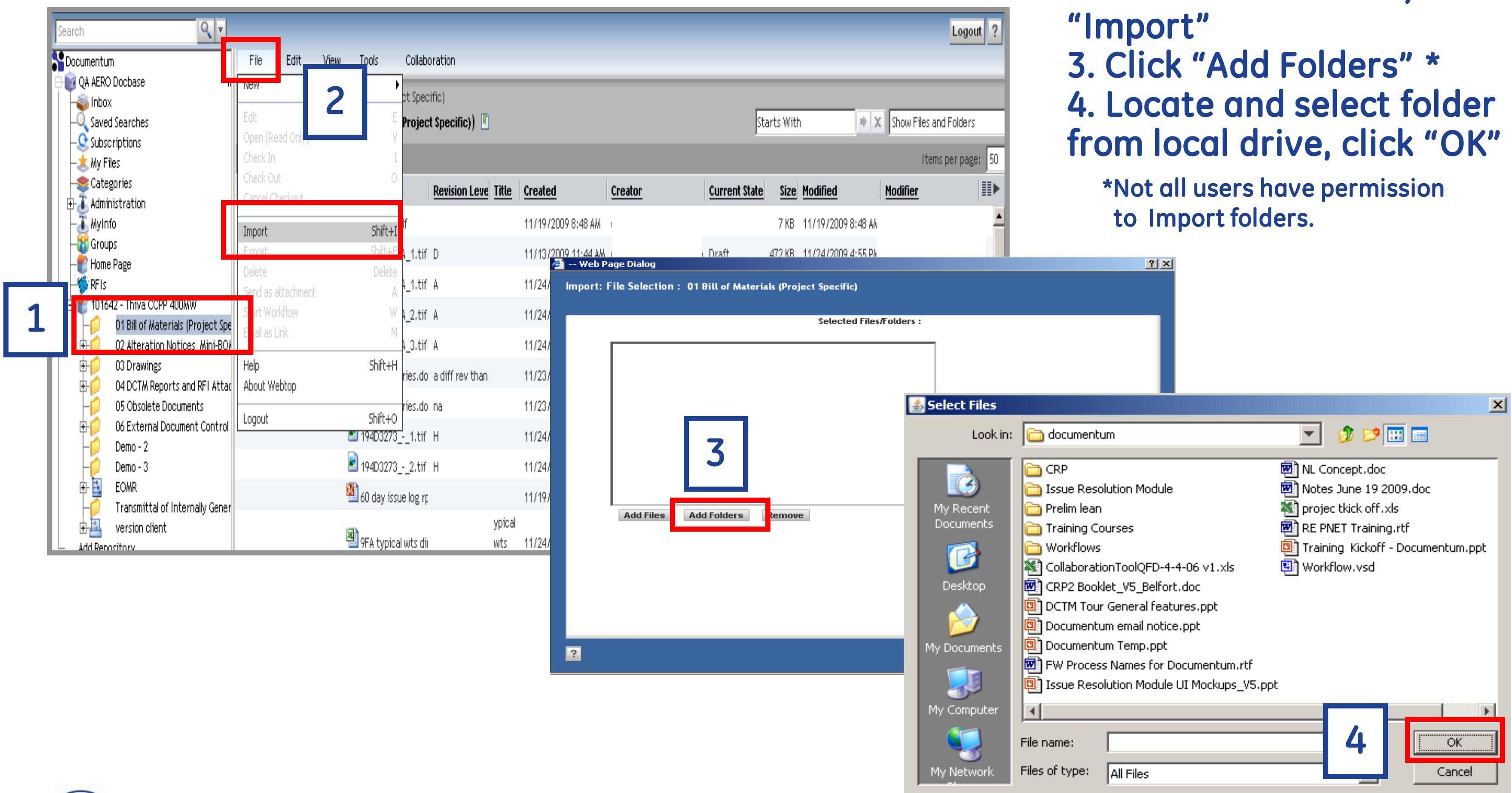
8. “Format” field will auto populate, but can be edited using drop-down
9. Complete other mandatory/optional fields
10. Click “Finish” (or “Next” for multiple files import)
11. View Confirmation* in bottom right of window



* For large files, after you click “Finish” you may perform other tasks. The green confirmation will appear when the Import completes.

Using Import

Import Folder from Local Drive



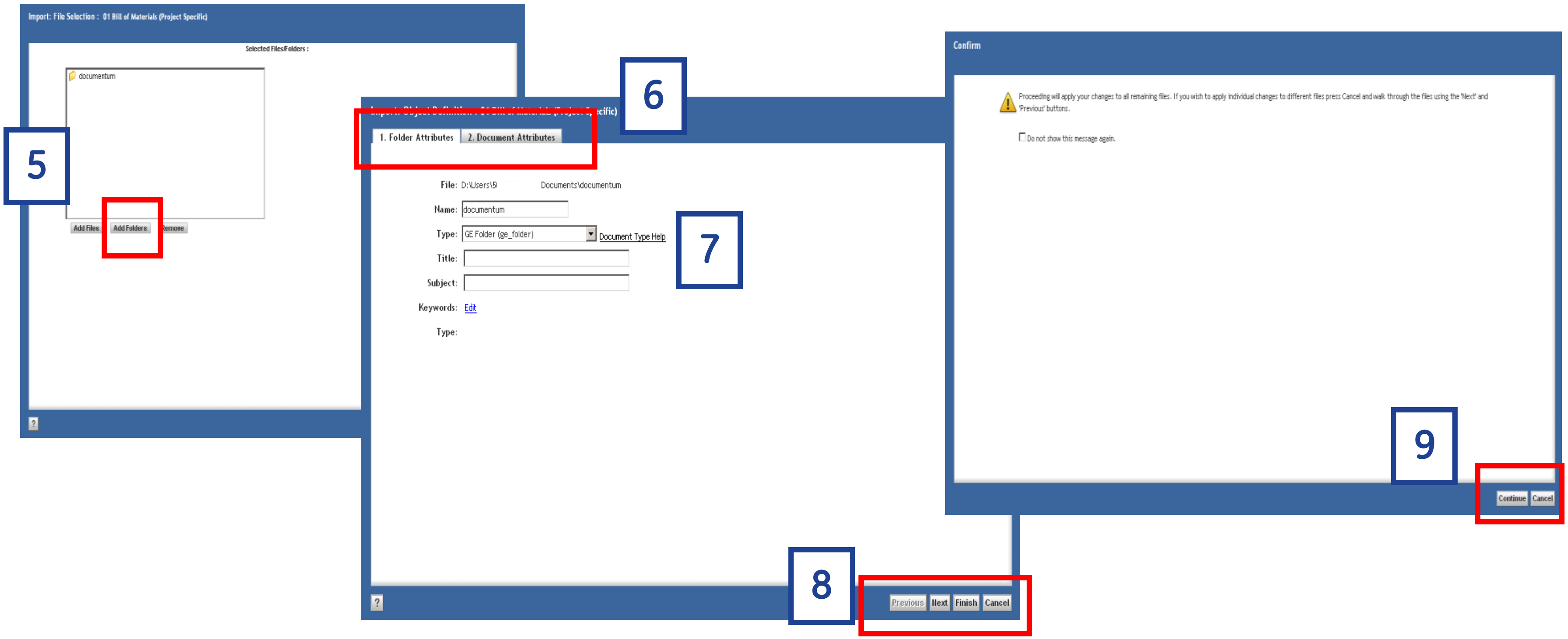
1. Select folder where your imported folder will be saved
2. Select "File" menu, then "Import"
3. Click "Add Folders" *
4. Locate and select folder from local drive, click "OK"

*Not all users have permission to Import folders.

Using Import

Set Attributes

Attributes can be set for folder being Imported <u>or</u> for each of document within folder.



5. Select "Attributes"
6. Select "Folder Attributes" or "Document Attributes" tab
7. Complete fields
8. Select "Next" or "Finish" as appropriate
9. Click "Continue" to finish

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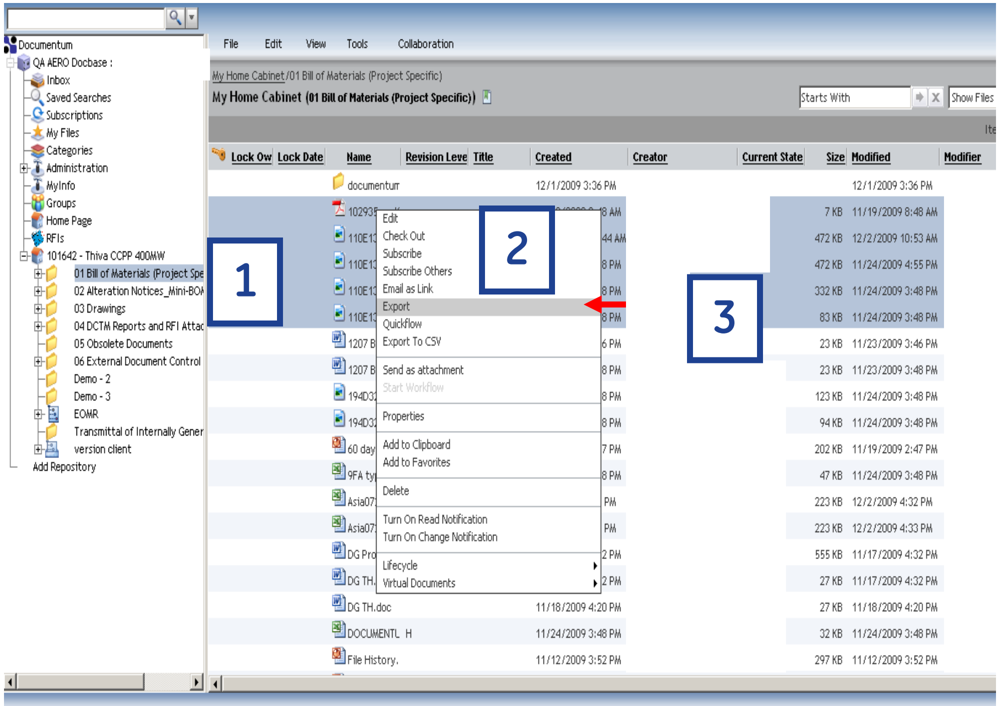
Export File

Select Files for Export



Export to save file copies to local drive

1. Select file(s) in workspace to highlight *
2. Right-click selected file(s) to open menu
3. Choose “Export”

*Select multiple files by using “Shift+Click” or “Ctrl+Click”.

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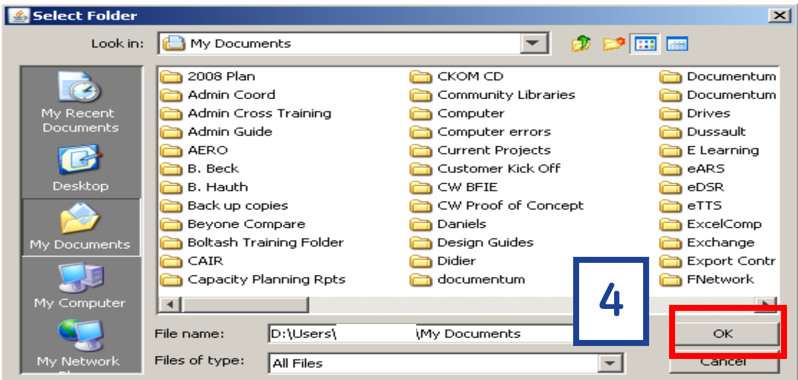
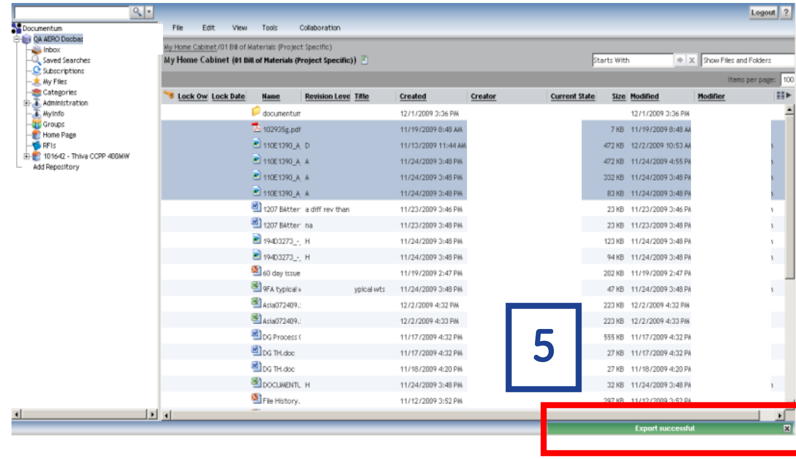
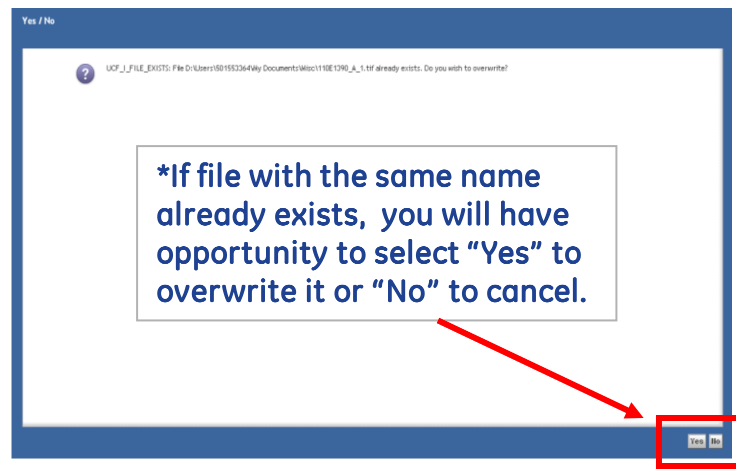
Export File

Select Files for Export







4. Select a destination for file(s) on local drive, click "OK" *
5. View Confirmation in bottom right of window

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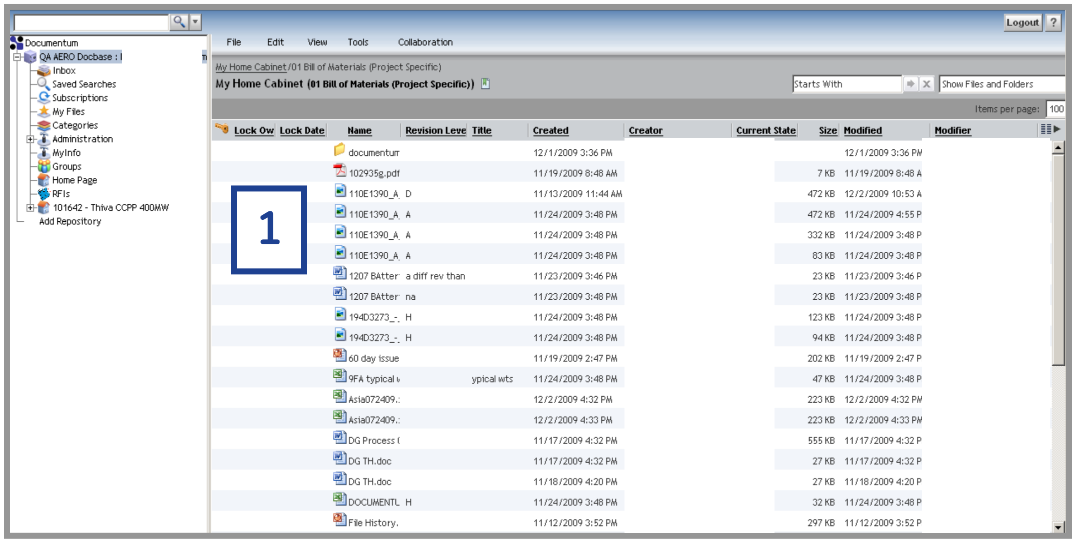
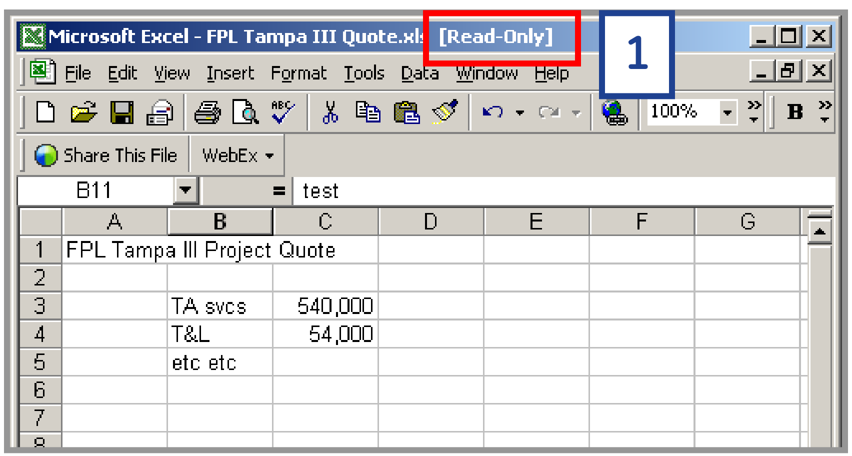
View Files (Read Only)





1. Double-click a file to open it "Read Only" in native application (.xls for Excel, etc.) *
2. The file may be saved in its application with the "Save As" function
3. Follow "Check Out / Check In" steps to create a version (revision) to the file (see next slides)

*A built in viewer is used to open files in an application not installed on the user's hard drive.

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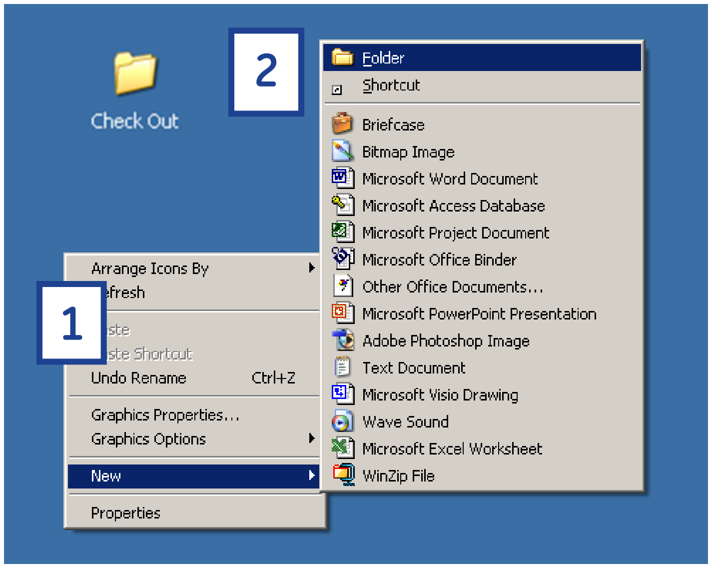
Revise for Version Control

One Time Setup for Check Out Folder Location



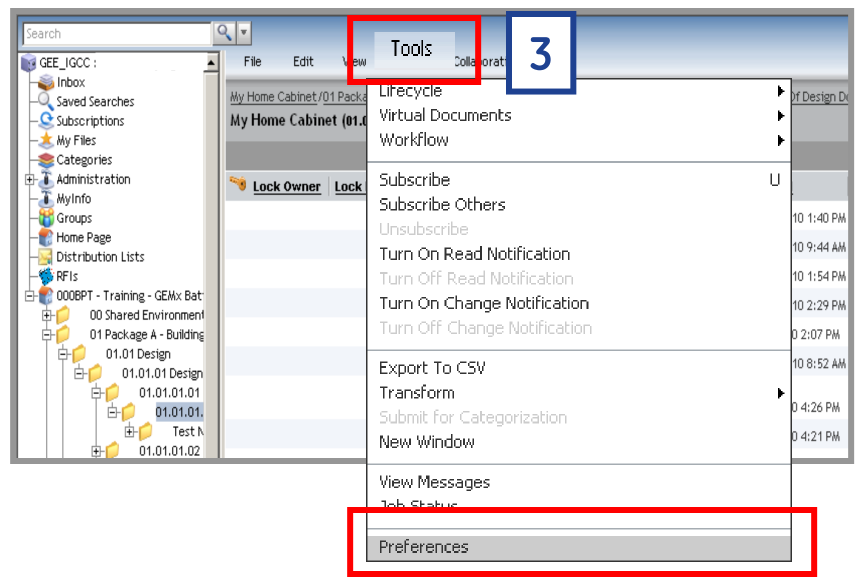
Documentum automatically creates a Check Out folder in the C-Drive. The user is able to change the path to a preferred folder location (e.g. Desktop for easy access)

To Create a Check Out folder in Desktop:

1. Right-click Desktop, select "New" then "Folder"

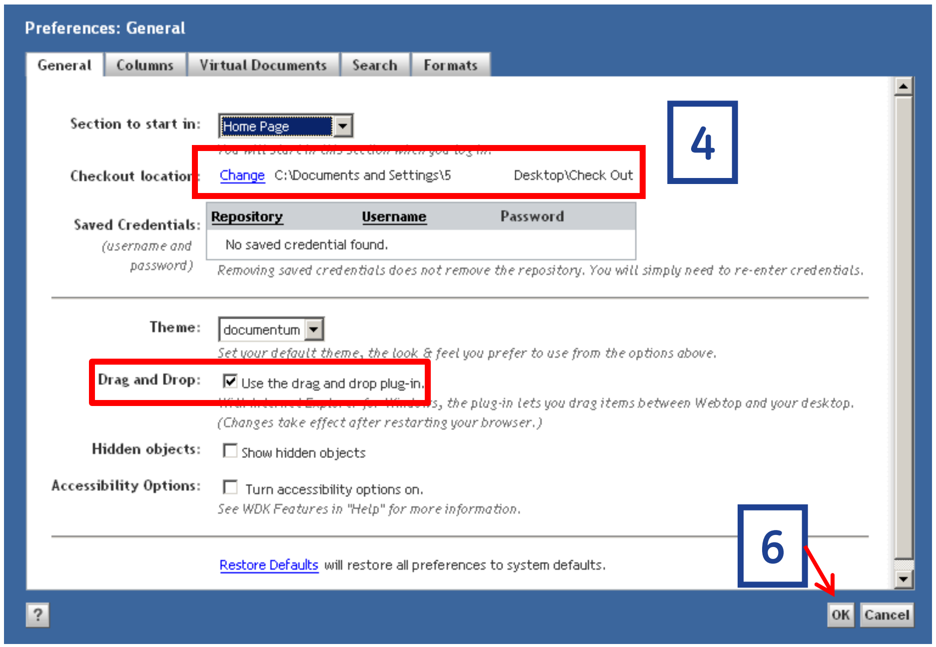
2. Name folder "Check Out"

3. Log in to Documentum, click "Tools" menu then "Preferences"



Revise for Version Control

One Time Setup for Check Out Folder Location



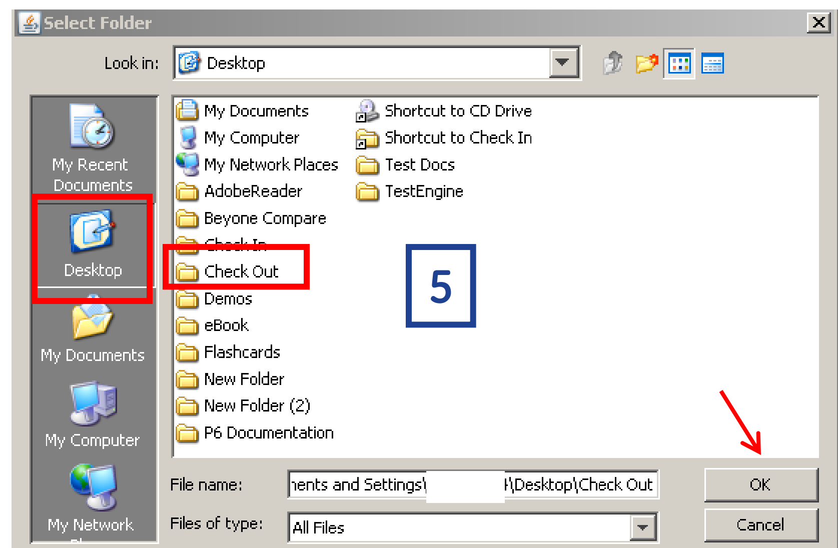
Set your Default Check Out folder:

4. Click "Change" link

5. Navigate to, and select the Check Out folder created on Desktop, click "OK"

6. Click "OK" to confirm

***Also, make sure the box for "Drag and Drop" is checked to allow you to use this feature**



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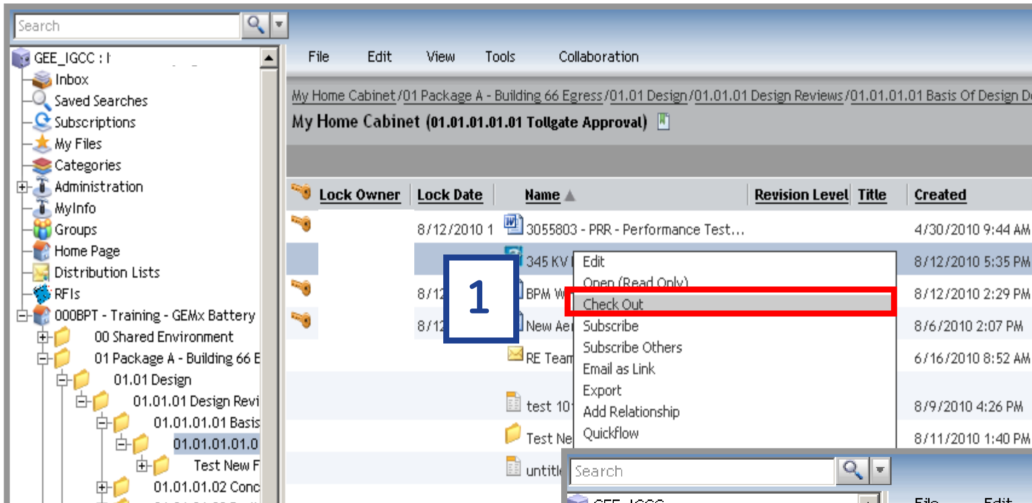
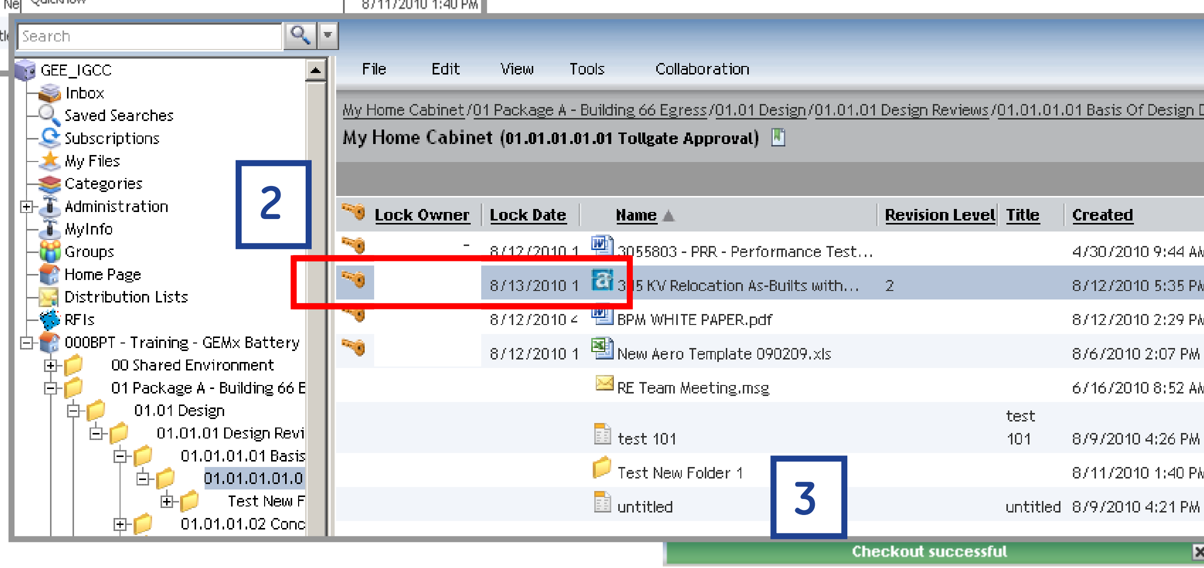
Revise for Version Control

Check Out Files to Local Drive



1. Select file, right-click it and select "Check Out" from menu
2. File will display with lock and owner listed after screen refreshes
3. Confirmation status bar will appear in bottom right of workspace
4. Navigate on local drive to Check Out folder, open file, revise and save*



* Default Check Out folder location may be changed (see previous steps for details).

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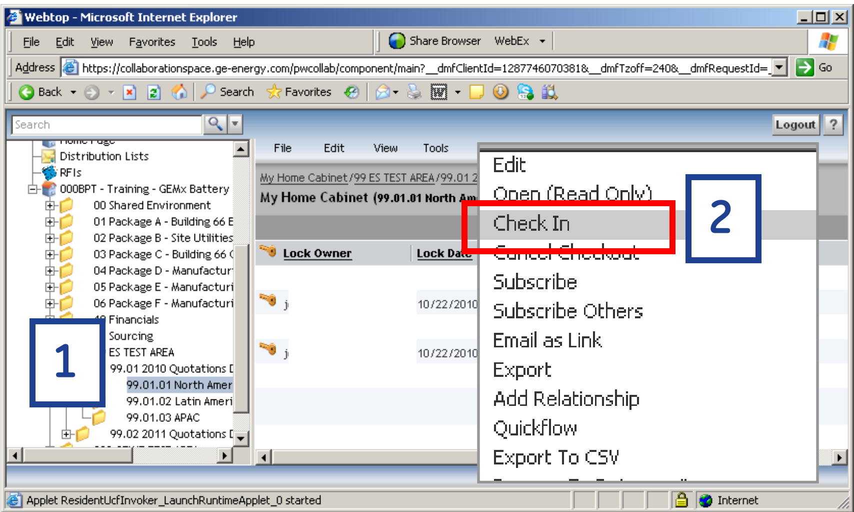
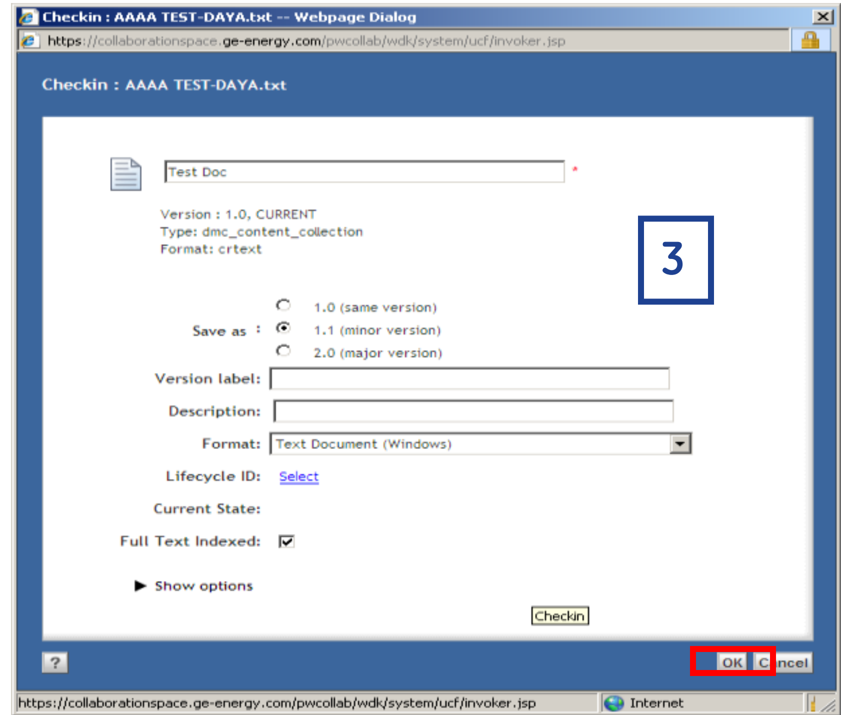
Revise for Version Control

Check In Files from Local Drive





Check In Process #1: If you saved revised file in Check Out folder:

1. Log in to Documentum, navigate to file that was checked out.

2. Right-click locked file and select "Check In"

3. Enter file attribute information, click "OK"

***New version will be placed on top of existing original or prior versions**

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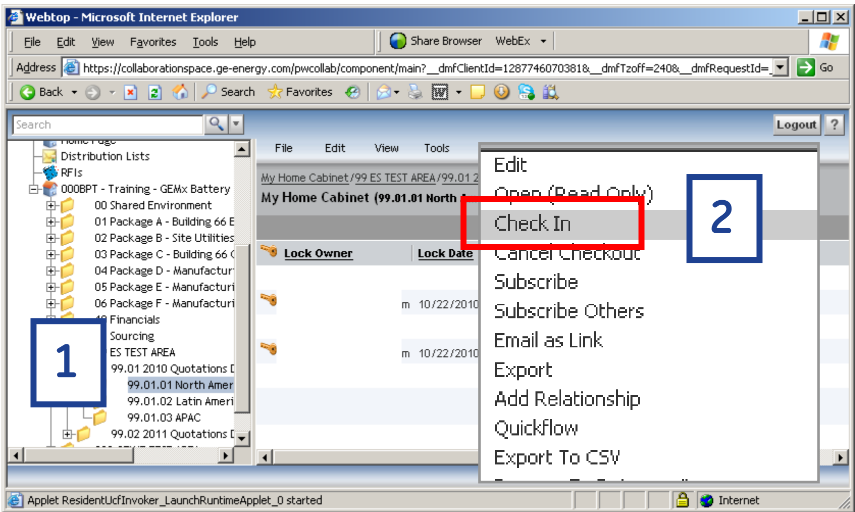
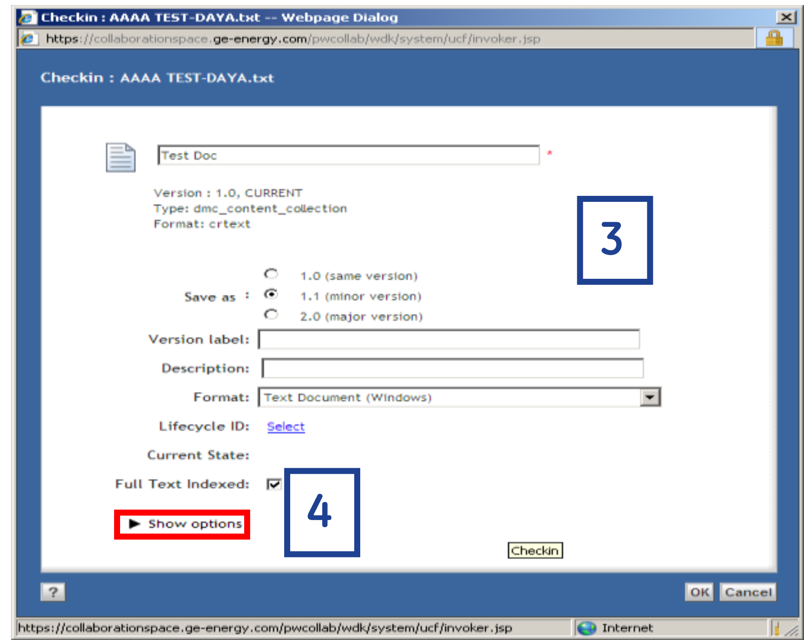
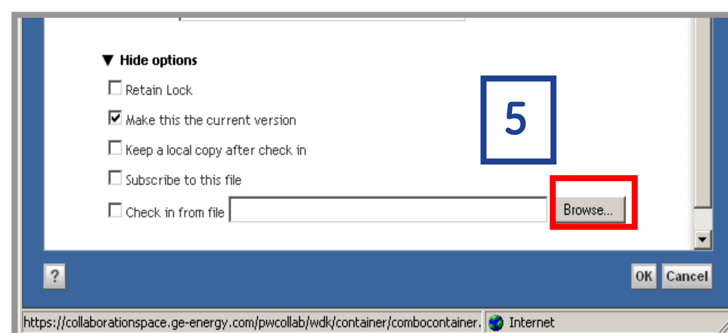
Revise for Version Control

Check In Files from Local Drive







Check In Process #2: To check in a different file as a version (other than the file checked out)

1. Log in to Documentum, navigate to file that was checked out.
2. Right-click locked file and select "Check In"
3. Enter file attribute information
4. Click "Show Options" link
5. Click "Browse"; navigate to file to check in and click "OK"

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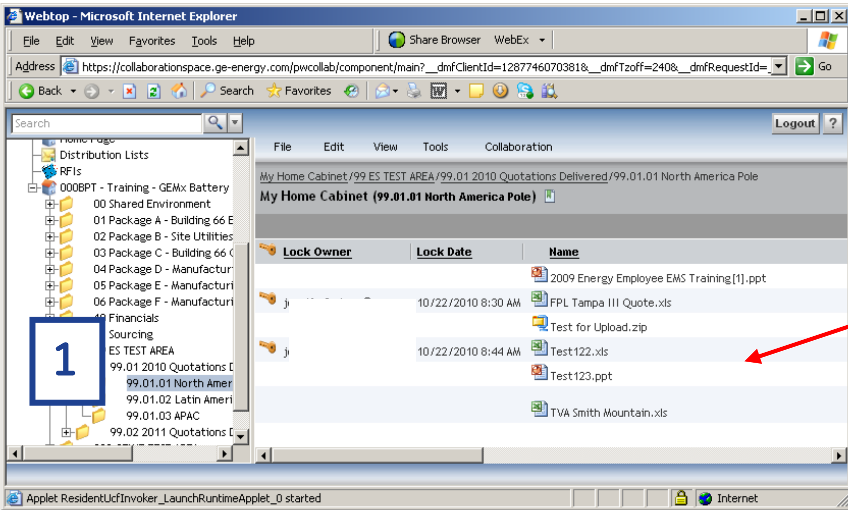
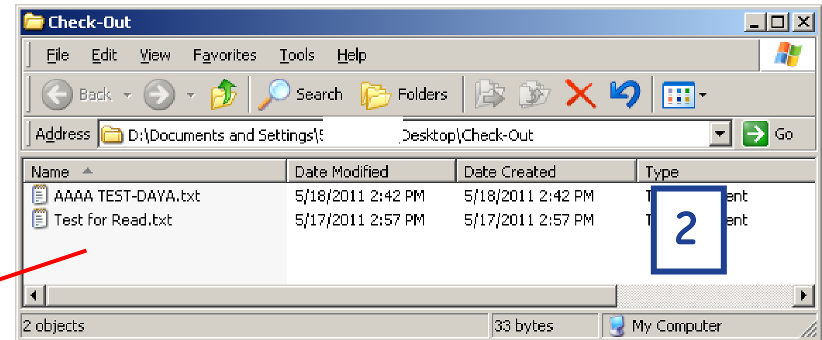
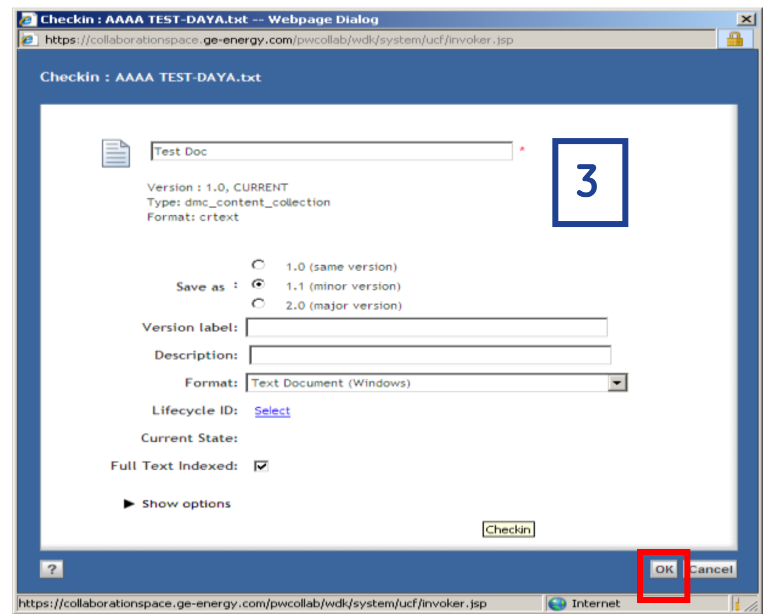
Revise for Version Control

Check In Files from Local Drive







Use Check In Process #3: If you saved revised files in Check Out folder, you can use Drag & Drop

1. Log in to Documentum, navigate to file that was checked out.
2. Navigate to Check Out folder, select revised file, drag it into Documentum and drop it <u>on top</u> of original file's icon*
3. Enter file attributes, click "OK"

*If drag and drop does not work, go to previous One Time Set Up steps to enable.

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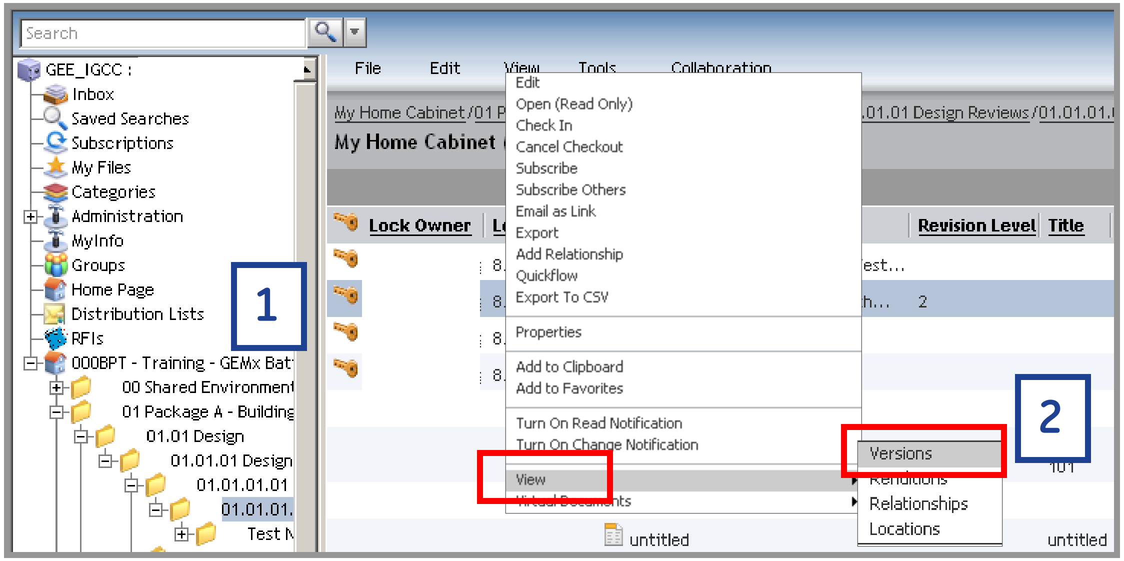
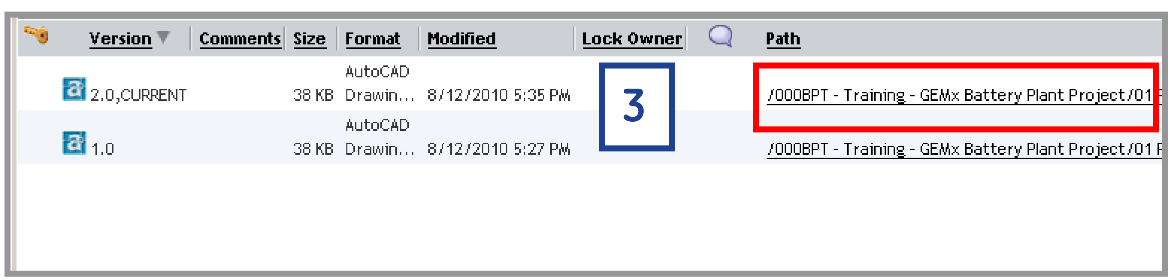
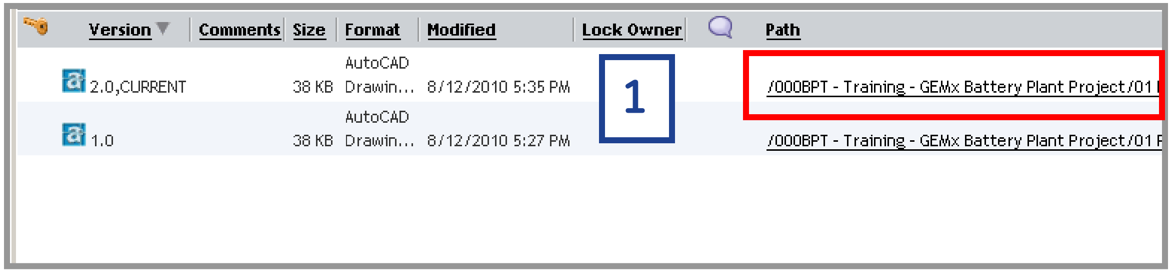
Reviewing Versions



1. Select a file and right-click it
2. Select "View" then "Versions" from menu
3. Versions work area opens, displaying location path/link for each file version

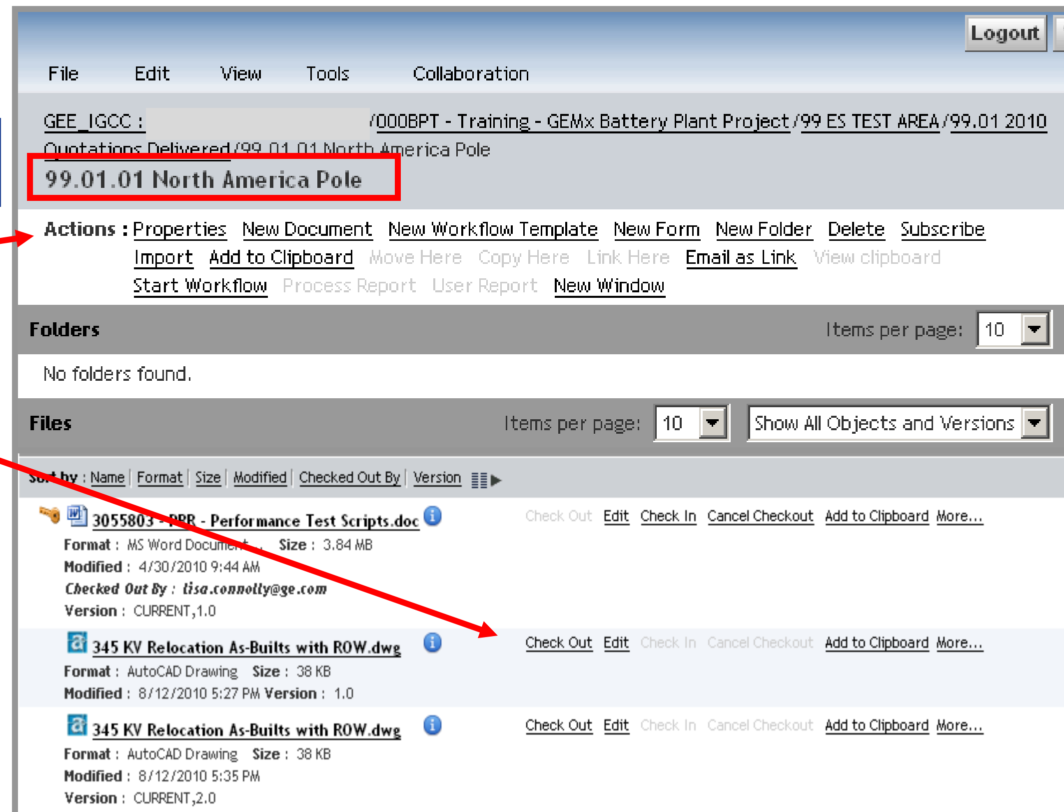


Reviewing Versions



1. Click link/path of file
2. You will be navigated to folder of selected file
3. All 'Actions' (based on your profile) for the folder itself are displayed above files
4. All 'Actions' (based on your profile) for each file in folder will be displayed in center column

2



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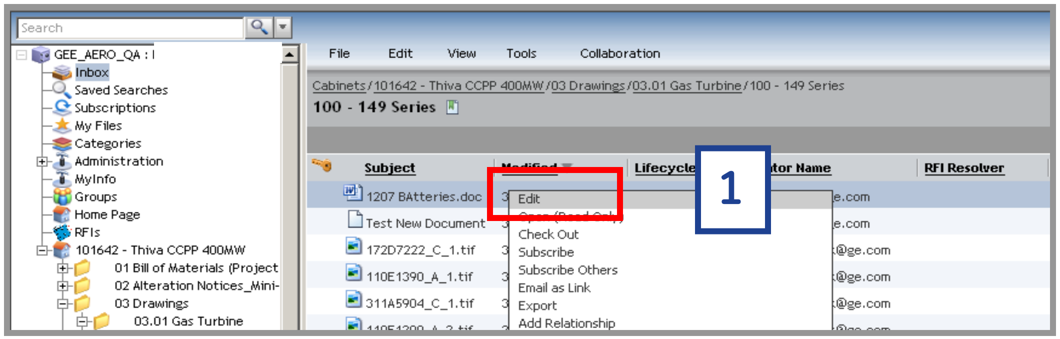
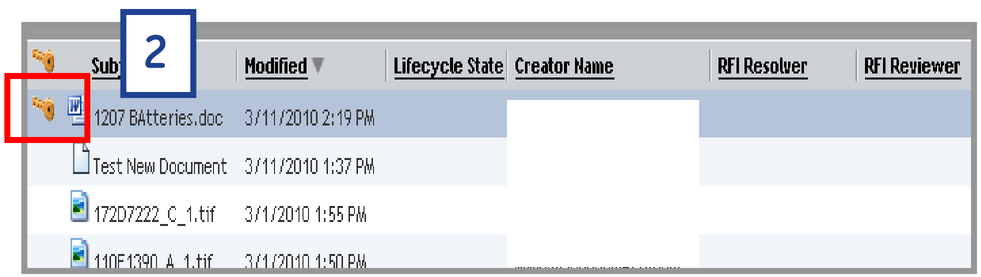
Edit Files

Check Out and Edit with One Click





1. Select file & right-click, then select “Edit” from menu
2. File will be checked out, locked and will open in native application (.xls for Excel)
3. Revise and save file

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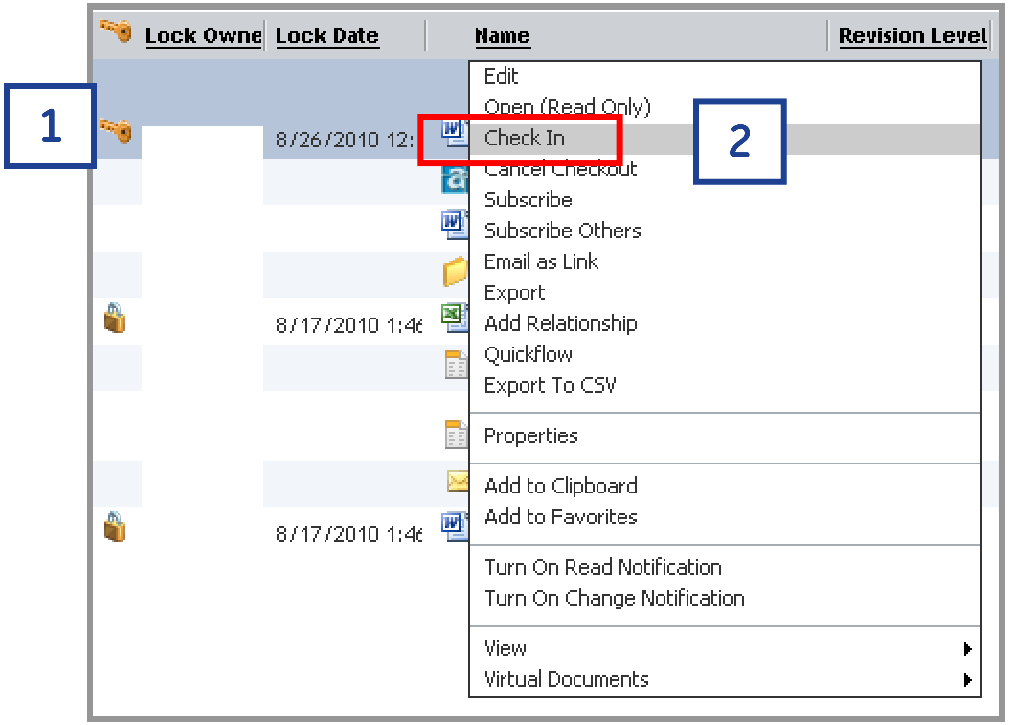
Edit Files

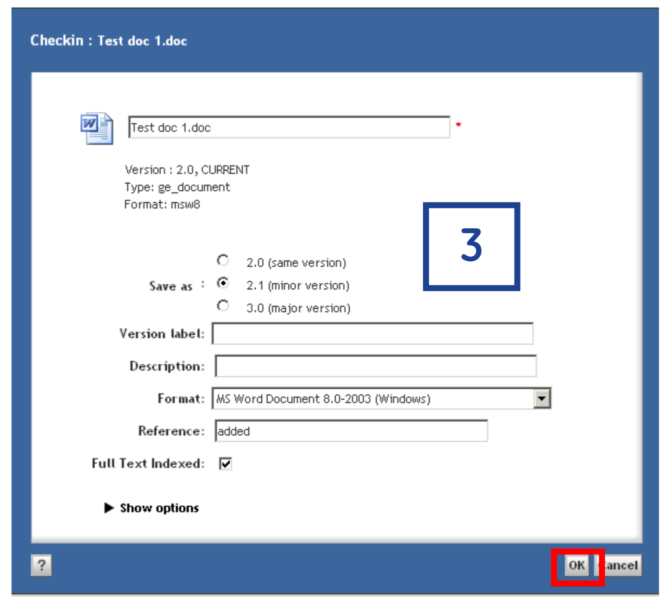
Check In Edited File



After editing and saving file:

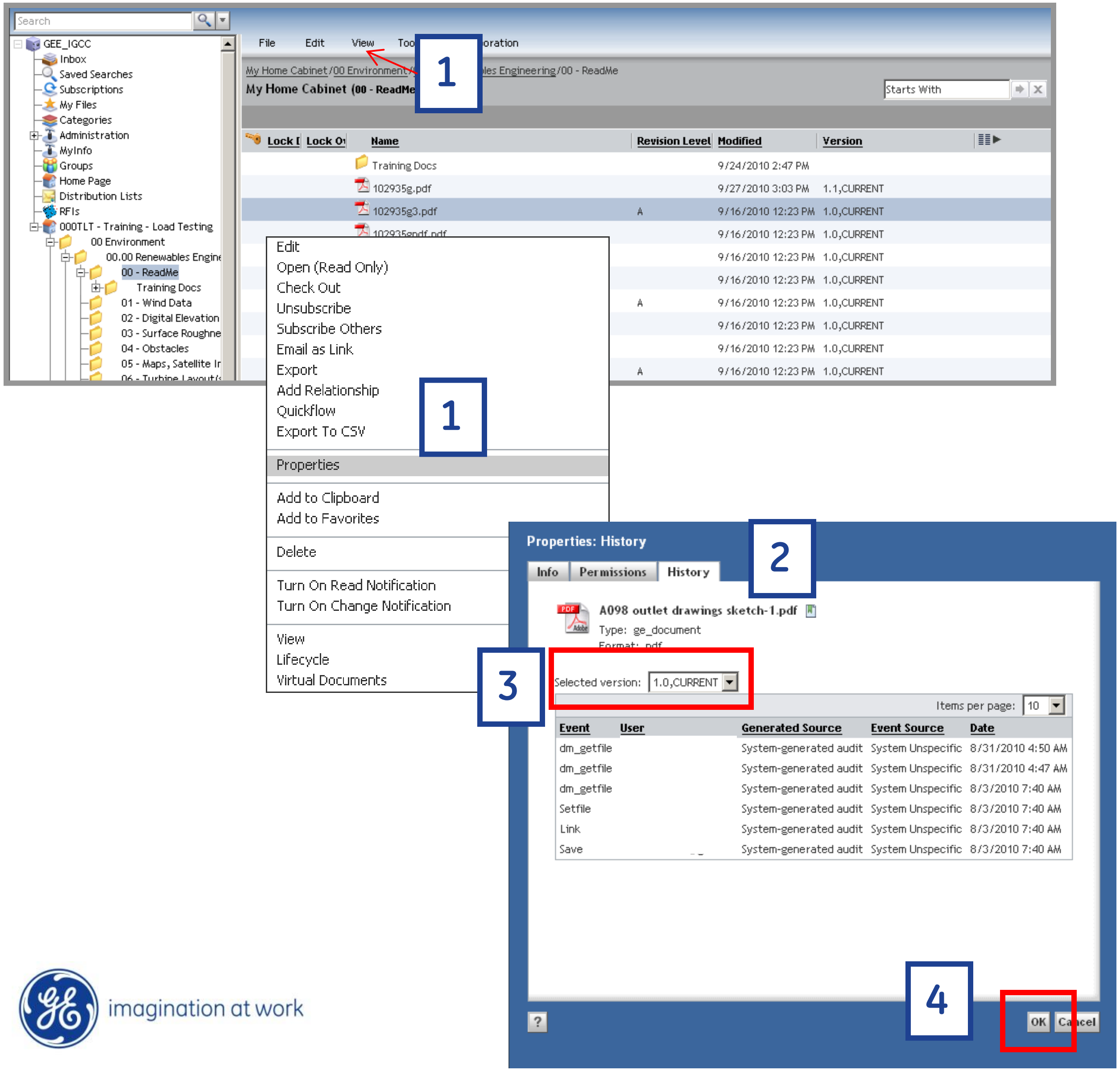
1. Select original locked file* and right-click
2. Select "Check In" from menu
3. Enter file attributes and click "OK"

*New version will be placed on top of existing original or prior versions



*Files you have locked will display a key, files others have locked will display a padlock.

View File History



1. Select file, right-click and select "Properties" from menu (or select "View" menu, click "Properties" then "History")
2. Click "History" tab
3. Click "Selected Version" drop-down to view each version history
4. Click "OK" to close

File History displays the activities on a file

Documentum Assistance

Contact Information

If you encounter any issues with Documentum, please send an email to: ebusinesstechsupport@ps.ge.com and include the following information:

1. Full Name
2. Email Address
3. SSO
4. Project Name
5. Screen Shot of any Errors