

Power & Water Customer Collaboration Documentum:

Navigation and Working With Files

Basics



imagination at work

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/pwcollab/>
2. Enter SSO and Password, click "Login"
3. Select "P&L Segment" drop-down to click business owning project you want to access and choose your physical location
4. Click "Login"

GE Infrastructure

Single Sign On

Enter User ID and Password

User ID:

Password:

Save my SSO Single Sign On User ID

THIS SITE CONTAINS GE PROPRIETARY INFORMATION

WARNING: YOU ARE ATTEMPTING TO ACCESS A PRIVATE COMPUTER SYSTEM. ACCESS TO THIS SYSTEM IS RESTRICTED TO AUTHORIZED PERSONS ONLY. THIS SYSTEM MAY NOT BE USED FOR ANY PURPOSE THAT IS UNLAWFUL OR DEEMED INAPPROPRIATE. ACCESS AND USE OF THIS SYSTEM IS ELECTRONICALLY MONITORED AND, BY ENTERING THIS SYSTEM, YOU ARE GIVING YOUR CONSENT TO BE ELECTRONICALLY MONITORED. WE RESERVE THE RIGHT TO SEEK ALL REMEDIES FOR UNAUTHORIZED USE, INCLUDING PROSECUTION.

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GE Infrastructure: Production

Login

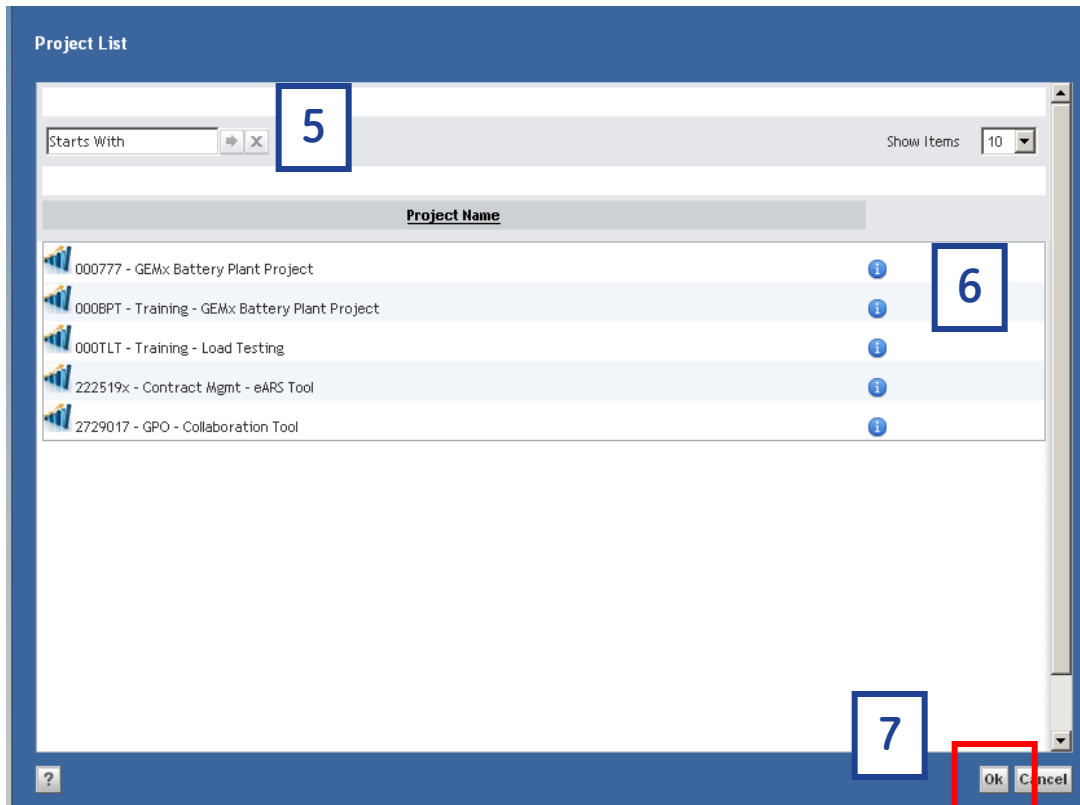
documentum

P&L Segments : AERO & GASIFICATION

Location : AMERICAS

[+] More Options

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

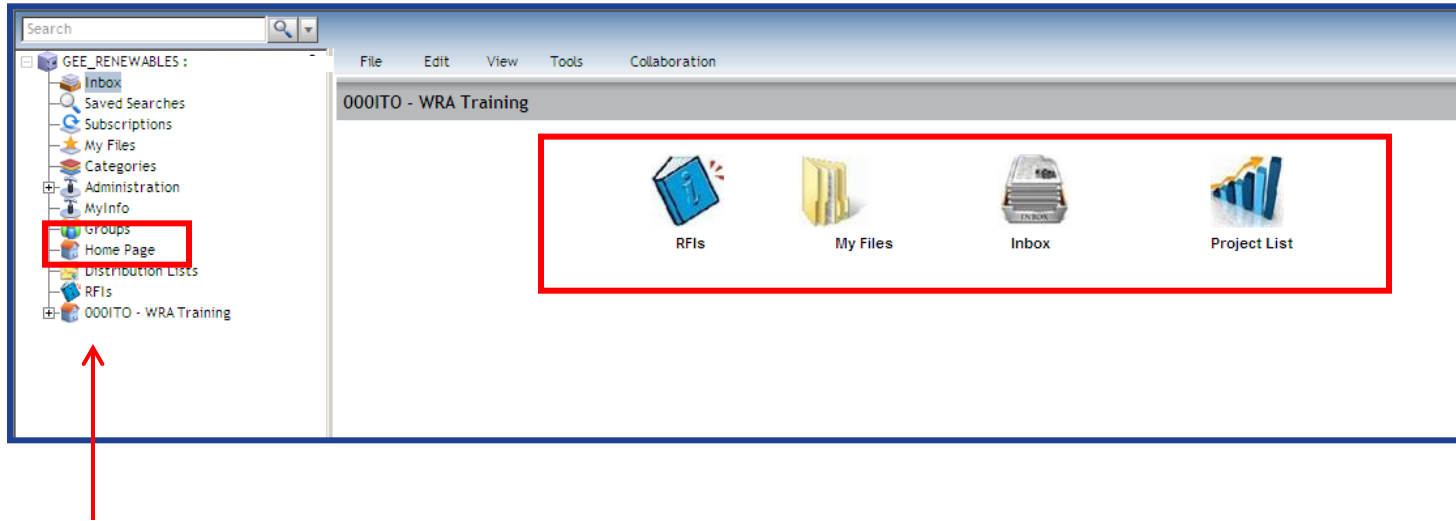
The screenshot shows the Review Workspace interface. At the top left is a search field with a magnifying glass icon and a search button. Below it is a navigation tree on the left side. The main area displays a list of files and folders. At the bottom, there is a status bar with a green message box that says "Import successful".

Lock Own	Lock Dai	Name	Revision Li	Title	Document S	Created	Creator	Modified	Modifier
		00.0 1,5XLE Table of Content				4/8/2010 1:49 PM		4/8/2010 1:49 PM	
		001.dwg	0	P - PRELIMIN.		4/8/2010 1:49 PM		4/8/2010 1:49 PM	
		02_0001 Rev E - Block Diagram	1	P - PRELIMIN.		4/8/2010 1:49 PM		4/8/2010 1:49 PM	
		1207 Batteries.doc				4/8/2010 1:49 PM		4/8/2010 1:49 PM	
		1238541Test.tif	2	P - PRELIMIN.		4/8/2010 1:49 PM		4/8/2010 1:49 PM	
		Hydro Project Transfer_Proc				4/13/2010 3:41 PM		4/13/2010 3:41 PM	
		Hydro Project Transfer_Proc				4/13/2010 4:39 PM		4/13/2010 4:39 PM	
		Inst Rfi report.doc	A			4/1/2010 2:36 PM		4/1/2010 2:36 PM	
		Master add 2009.xls	a	My test	AB - AS BUILT	4/12/2010 11:52 AM		4/12/2010 11:52 AM	

Navigation Tree - with folders for selected project displayed

Status Bar - with message displayed

Review Home Page



To access, select “Home Page” in Navigation Tree

Home Page Icons:

RFI's – Log of all RFI's in selected project

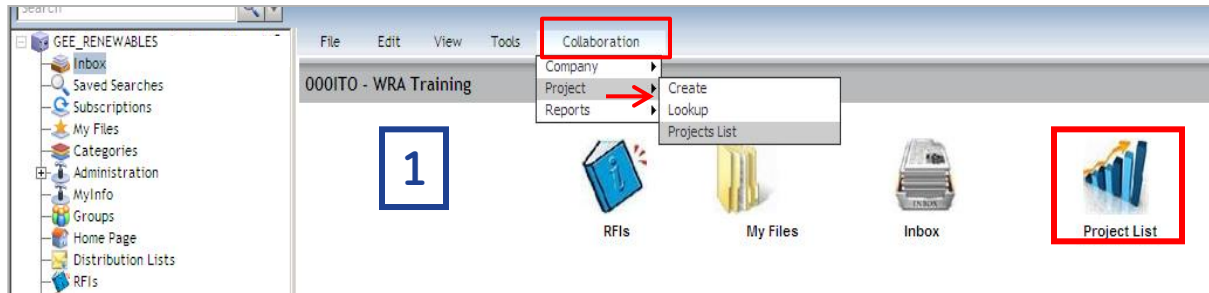
My Files – 7 day history of your imported, exported, or edited documents. Includes commented RFIs and list of all locked documents

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

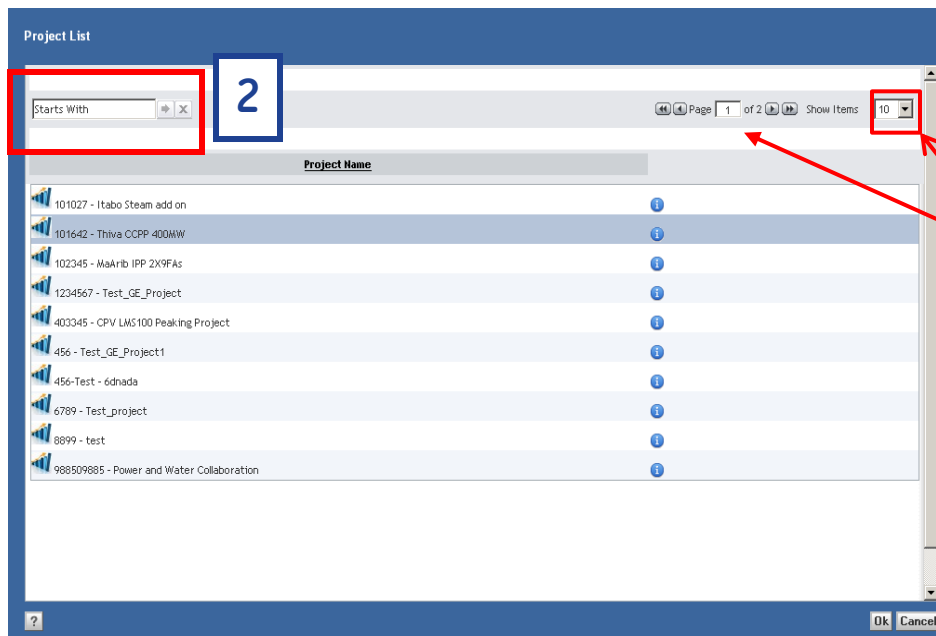
Project List - Opens Project List window to search for and select a different project to display in Navigation Tree

Use Project List

To Access a Different Project

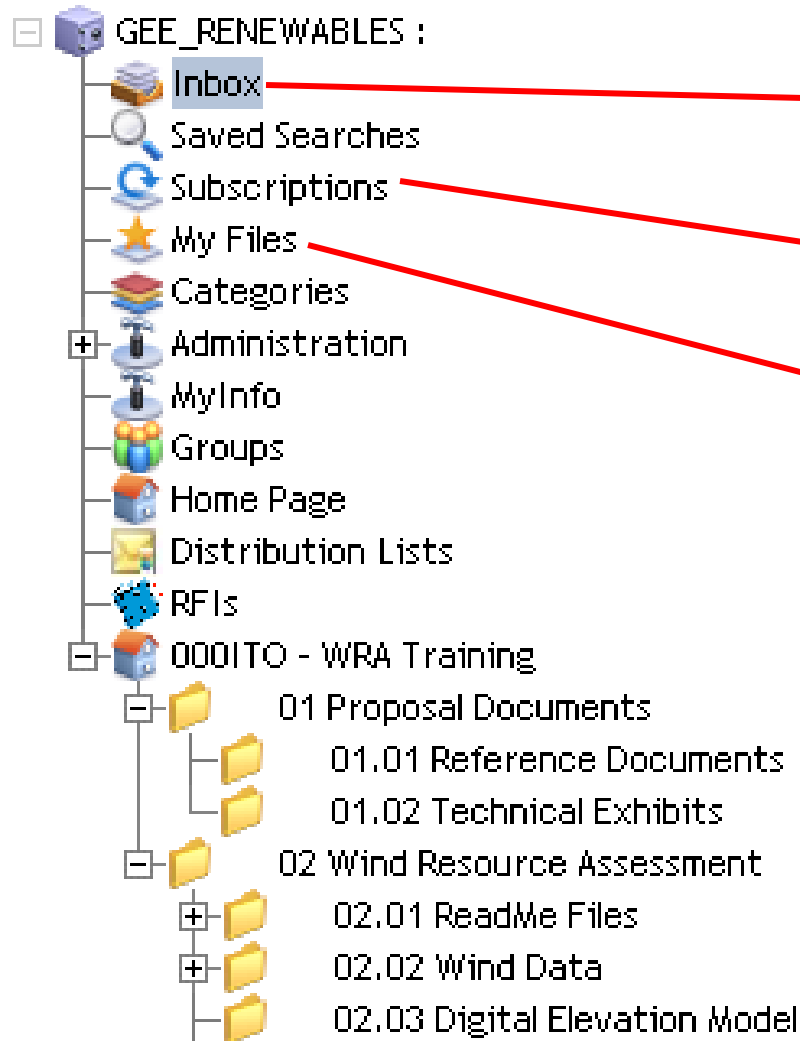


1. On Home Page, click “Project List” icon or, choose “Collaboration”, “Project” then “Project List” from any window
2. Use “Starts With” field to search for project*
3. Select project in list and click “OK” in bottom right of window



* 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

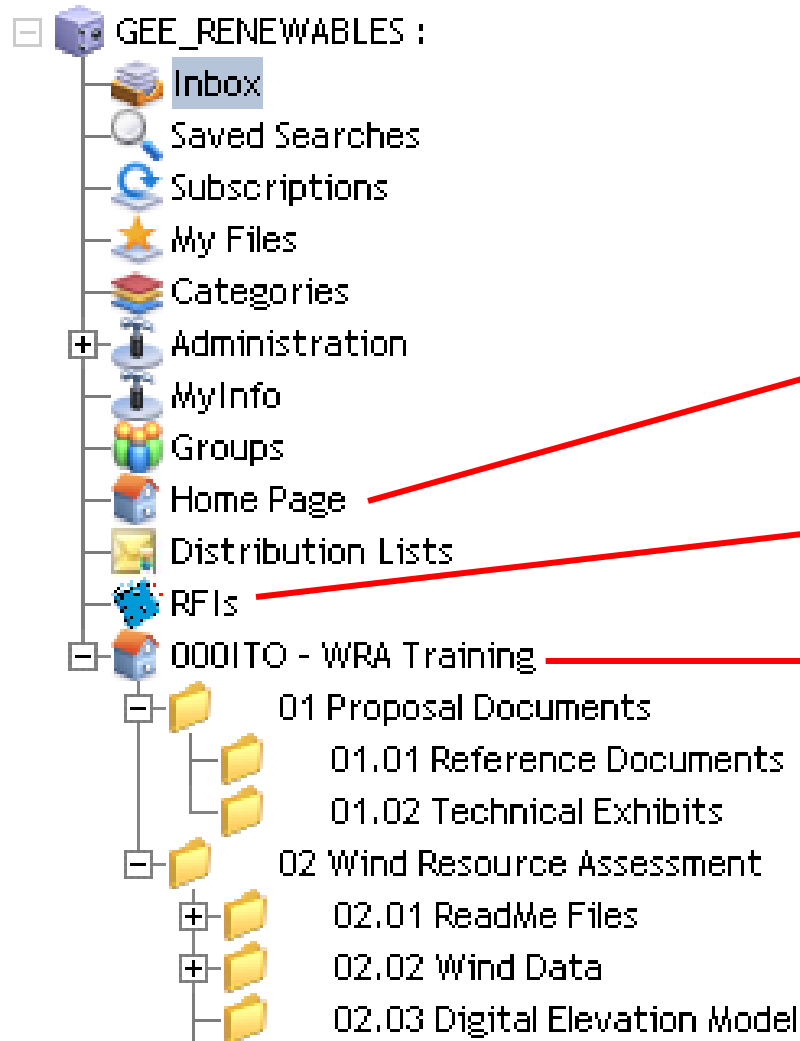


Inbox – Location for *all* tasks assigned to you, across *all* projects in business segment

Subscriptions – A ‘favorites’ list of folder and file shortcuts.

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

Review Navigation Tree



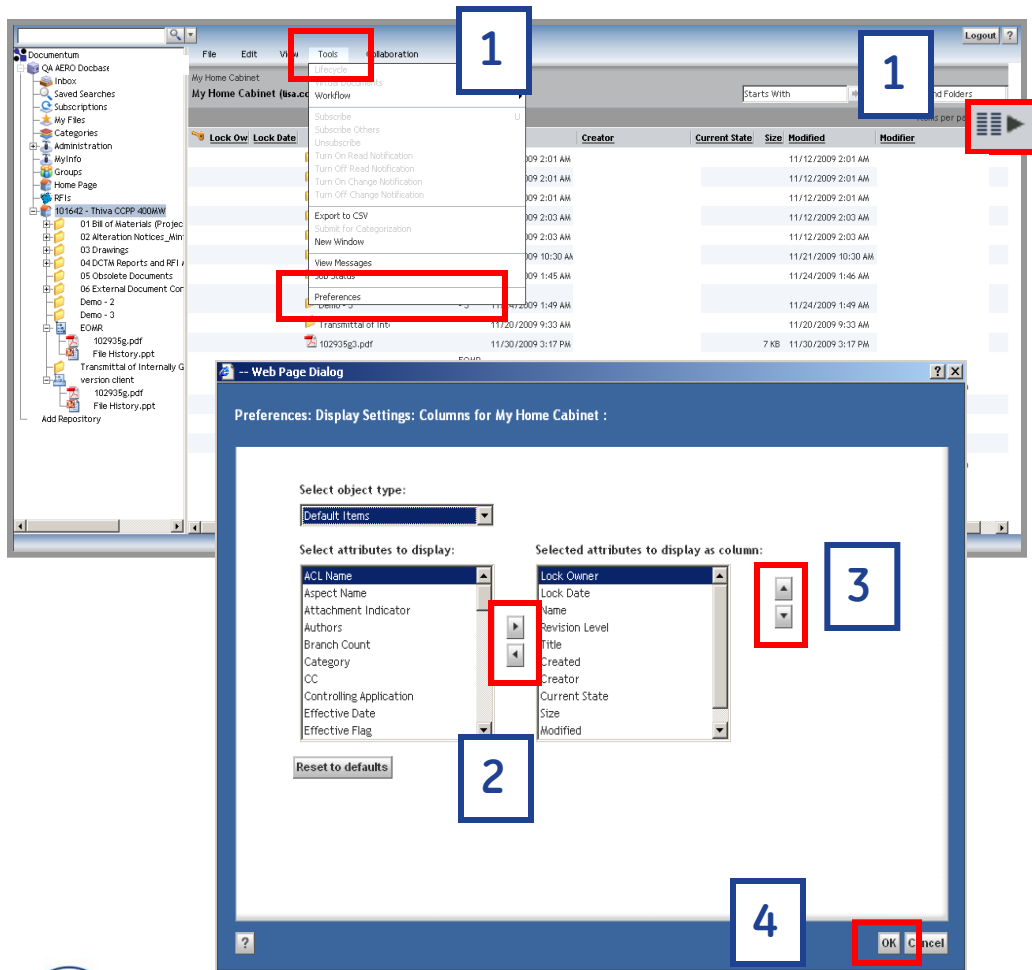
Home Page – Initial page displayed when a project is loaded. Contains the shortcut menu icons (including “Project List”)

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"

In Workspace:

- Click column name to order it alphabetically or numerically
- Place and hold mouse on column border to size accordingly

Modify Preferences

General Tab for Checkout and Drag and Drop

The image shows a screenshot of the Documentum web interface. The 'Tools' menu is open, and the 'Preferences' option is highlighted. A red box labeled '1' is around the 'Tools' menu. Another red box labeled '2' is around the 'Preferences' option. A third red box labeled '3' is around the 'Drag and Drop' checkbox in the 'Preferences: General' dialog box. The dialog box shows the 'General' tab selected, with the 'Checkout location' set to 'C:\Documents and Settings\Desktop\Check Out' and the 'Drag and Drop' checkbox checked.

1

2

3

Preferences: General

General Columns Virtual Documents Search Formats

Section to start in:

You will start in this section when you log in.

Checkout location: [Change](#) C:\Documents and Settings\Desktop\Check Out

Saved Credentials:

Repository	Username	Password
No saved credential found.		

(username and password)
Removing saved credentials does not remove the repository. You will simply need to re-enter credentials.

Theme:

Set your default theme, the look & feel you prefer to use from the options above.

Drag and Drop: Use the drag and drop plug-in.
Web Internet Explorer for Windows: the plug-in lets you drag items between Webtop and your desktop.
(Changes take effect after restarting your browser.)

Hidden objects: Show hidden objects

Accessibility Options: Turn accessibility options on.
See WDK Features in "Help" for more information.

OK Cancel

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

Perform Searches

Basic Search: search by key word in name across entire accessed project

Advanced Search: conduct a more complex search across entire accessed project

Workspace Search: key word search only of content displayed in workspace

The screenshot shows a software interface with a search bar in the top left corner, a magnifying glass icon next to it, and a workspace area with a table of files. A red box labeled '1' highlights the search field. A blue box labeled '2' highlights the magnifying glass icon. A blue box labeled '3' highlights the 'Starts With' field in the workspace area.

Lock Owner	Lock Date	Name	Revision L	Title	Created	Creator	Size	Modified	Modifier
					4/19/2010 10:42 AM		1 k	4/19/2010 10:42 AM	
					4/19/2010 10:44 AM		1 k	4/19/2010 10:44 AM	
					4/19/2010 12:19 PM		1 k	4/19/2010 12:19 PM	
				title					
		Aero doc.xls	A	infor	4/21/2010 8:48 AM		49	4/21/2010 8:48 AM	
		Browser-Cache Clearer			4/28/2010 9:46 AM		4 k	4/28/2010 9:46 AM	
william.schanck	4/29/2010	Lesson Learned.ppt			4/21/2010 11:55 AM		22	4/21/2010 11:55 AM	
		PMO_AudioConferencir	a		4/21/2010 11:53 AM		23	4/21/2010 11:53 AM	

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

Perform Basic Search

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

The screenshot shows a software interface with a search bar in the top left containing the text "report". The main workspace displays a table of files and folders. A search results window is open in the foreground, showing 350 results for "report" in GEE_IGCC - 4/1/2010 2:39 PM. The results are displayed in a table with the following columns: Name, Ranking, Lock Owner, Format, Size, Modified, and Source. A red arrow points to the Ranking column in the search results table.

Name	Ranking	Lock Owner	Format	Size	Modified	Source
12/16/2009 23:01:25 dm_FTStateOfIndex	58%		Text Document ...	3 KB	12/16/2009 11:01 PM	GEE_IGCC
12/16/2009 23:00:43 dm_FTCreateEvents	58%		Text Document ...	3 KB	12/16/2009 11:00 PM	GEE_IGCC
12/18/2009 23:00:56 dm_FTCreateEvents	58%		Text Document ...	4 KB	12/18/2009 11:01 PM	GEE_IGCC
12/19/2009 23:01:28 dm_FTCreateEvents	57%		Text Document ...	3 KB	12/19/2009 11:01 PM	GEE_IGCC
12/20/2009 23:01:05 dm_FTCreateEvents	57%		Text Document ...	3 KB	12/20/2009 11:01 PM	GEE_IGCC
12/21/2009 23:00:53 dm_FTCreateEvents	57%		Text Document ...	3 KB	12/21/2009 11:01 PM	GEE_IGCC
12/22/2009 23:00:50 dm_FTCreateEvents	57%		Text Document ...	3 KB	12/22/2009 11:00 PM	GEE_IGCC
12/16/2009 16:11:33 dm_DataDictionaryPublishe	56%		Text Document ...	3 KB	12/16/2009 4:12 PM	GEE_IGCC
12/16/2009 20:40:46 dm_DataDictionaryPublishe	56%		Text Document ...	3 KB	12/16/2009 8:41 PM	GEE_IGCC
12/17/2009 15:10:28 dm_DataDictionaryPublishe	56%		Text Document ...	3 KB	12/17/2009 3:11 PM	GEE_IGCC

Perform Advanced Search

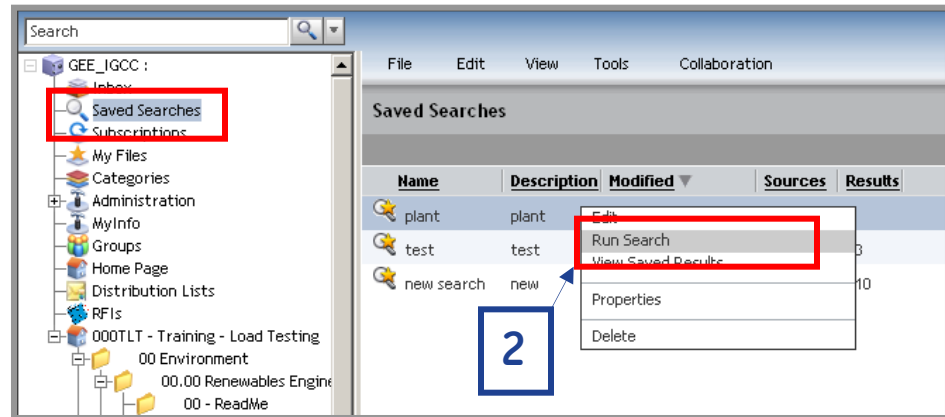
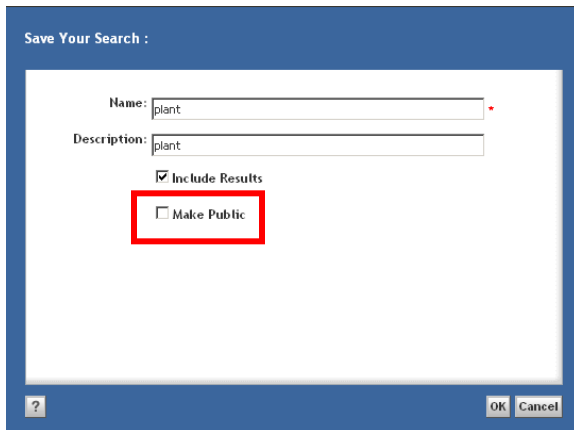
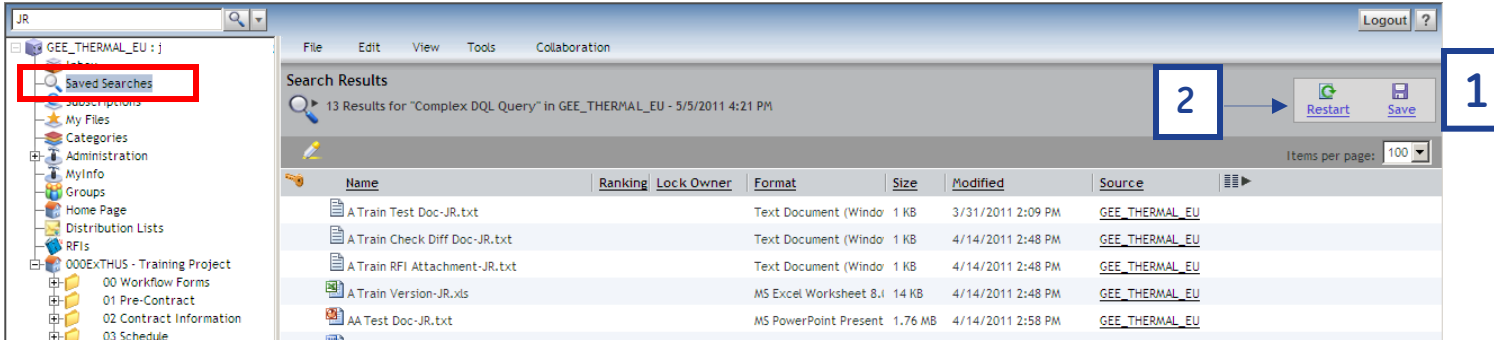
Click "Arrow" (next to upper left search field) to open "Advanced Search" window.

The screenshot shows the 'Advanced Search: General' dialog box. At the top left of the main application window, a red box highlights the 'Advanced' button. In the dialog box, a red box highlights the 'Contains: plant' field (1). Below it, the 'Object Type' dropdown is set to 'Other Documents (ge_document)' (2). The 'Properties' section shows 'Name' selected with 'contains' as the operator (3). A red arrow points to the 'Add another property' link (4). At the bottom right of the dialog, a red box highlights the 'Search' button (5). The background shows a search results window with 150 results for 'report' in GEE_IGCC.

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

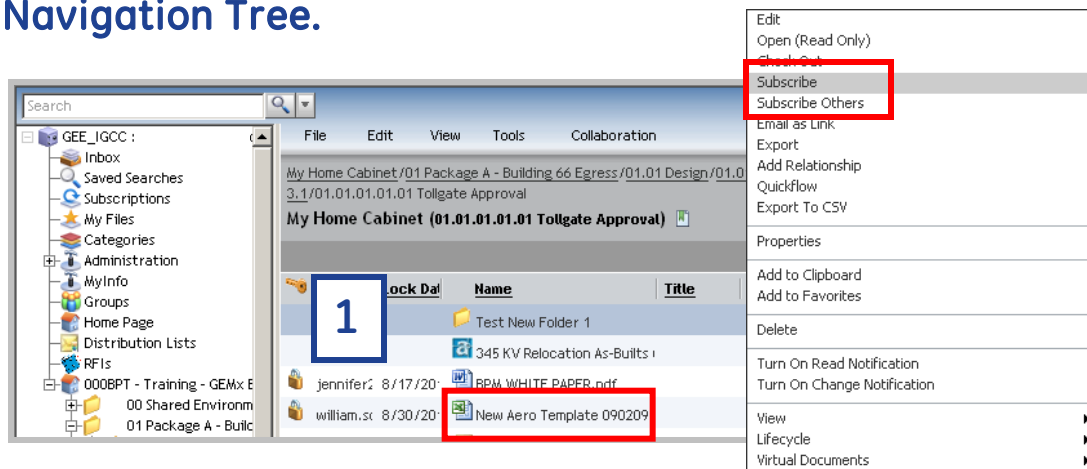
1. Save a search: click the “Save” icon after running a search*
 2. Restart a saved search for ‘up to date’ results: select the search, right click and choose “Run Search” or select and open (double click) a saved document search and click the “Restart” icon.
- *Click “Saved Searches” node of Navigation Tree to locate your saved searches



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

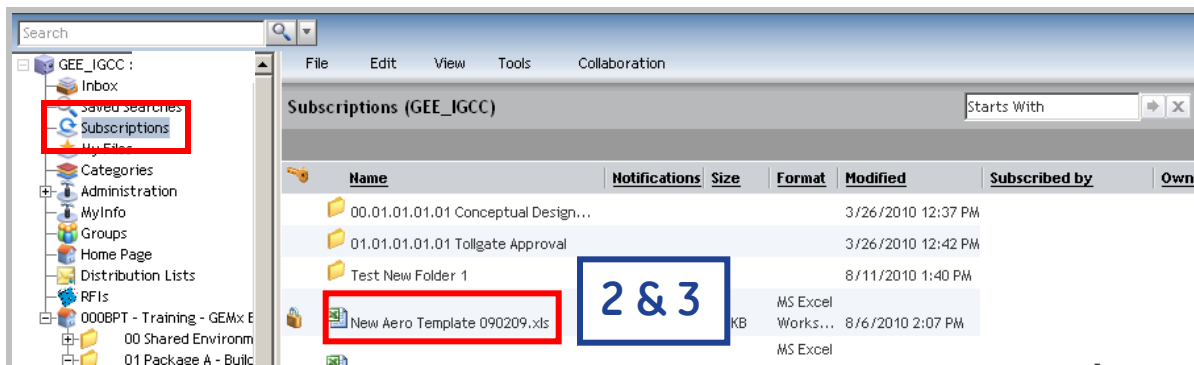
Subscriptions

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*:

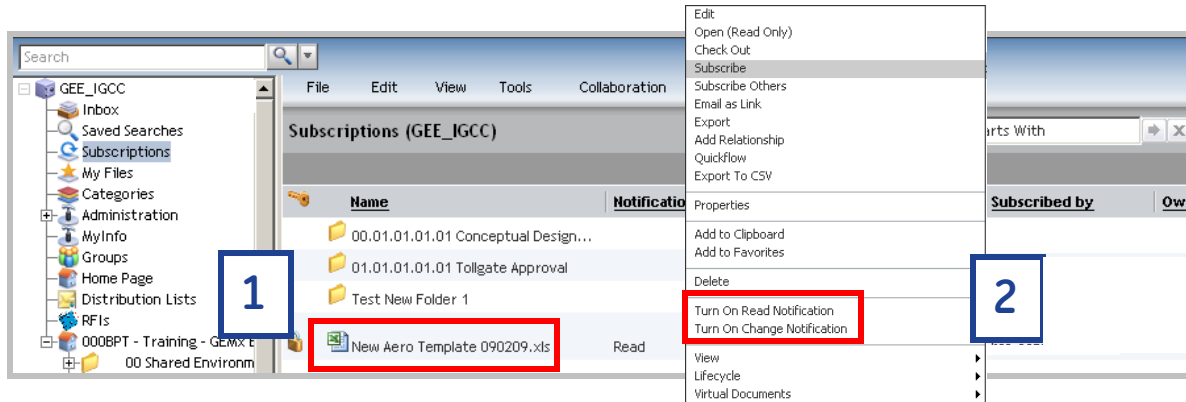
1. Select folder or file in workspace, right-click and select “Subscribe” from menu
2. Folder or file will be available in the “Subscriptions” node of Navigation Tree
3. Select “Subscriptions” to access all subscribed objects across projects within a business segment



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

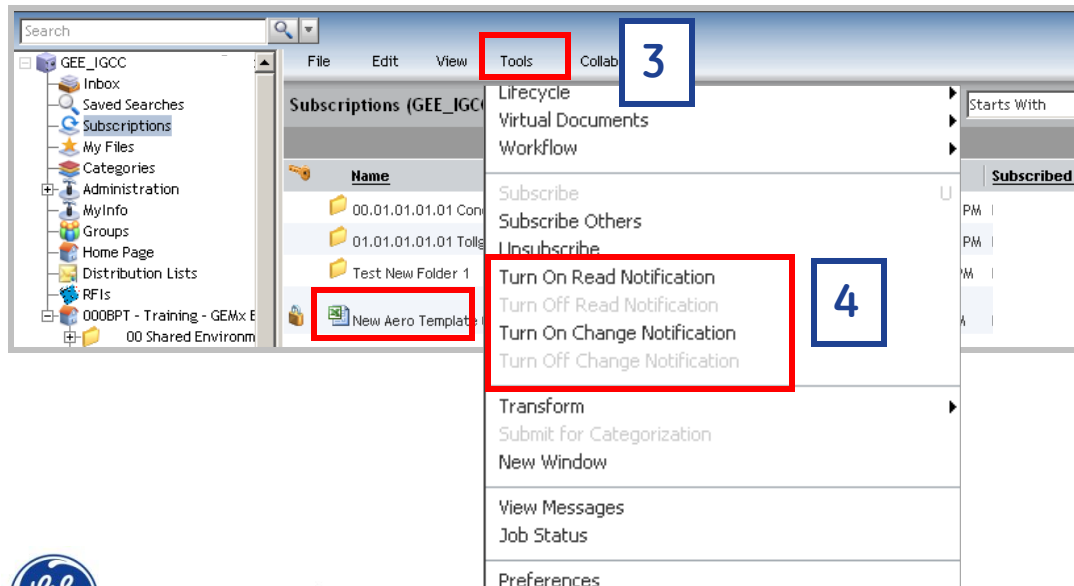
Notifications for Subscriptions

One can set “Read” and “Change” Notifications for Subscriptions. Notifications generate an ‘alert’ that is sent to both 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.

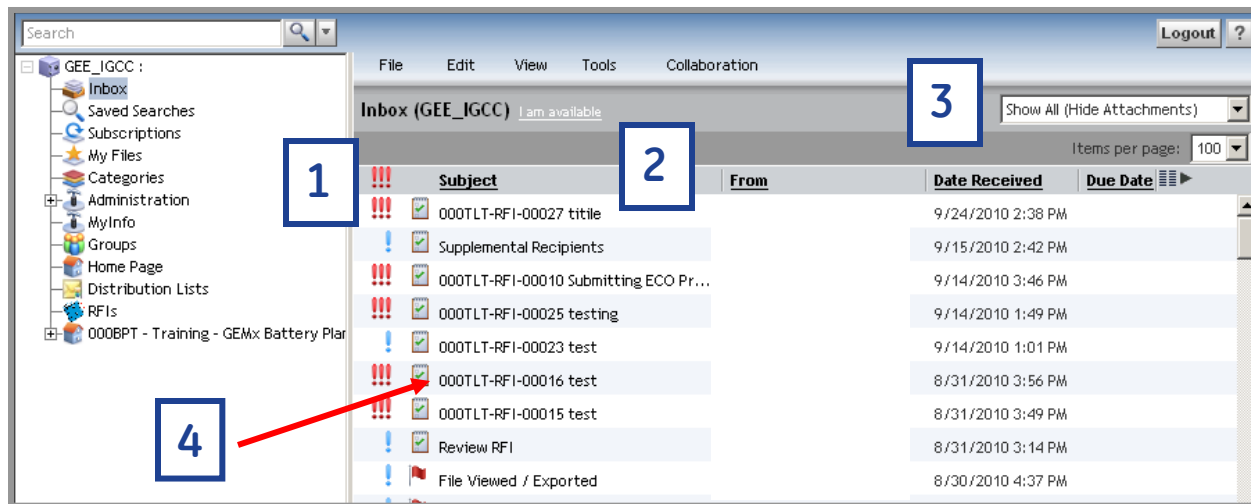


Read: sends alert when someone opens (views) or exports the file

Change: sends alert when someone checks out, check in or changes the file or folder in some manner

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

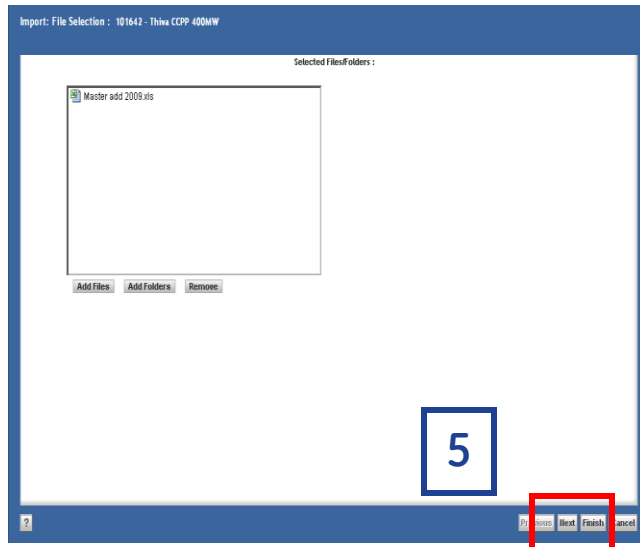
Using Import Bring in Files from Local Drive

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"

The screenshot illustrates the steps for importing files into Documentum. The main window shows a table of revisions with columns: Revision, Level, Title, Created, Creator, Current State, Size, Modified, and Modifier. The 'Import' option is highlighted in the 'File' menu. The 'Import: File Selection' dialog box shows the 'Add Files' button. The 'Select Files' dialog box shows the file selection process, with the 'OK' button highlighted.

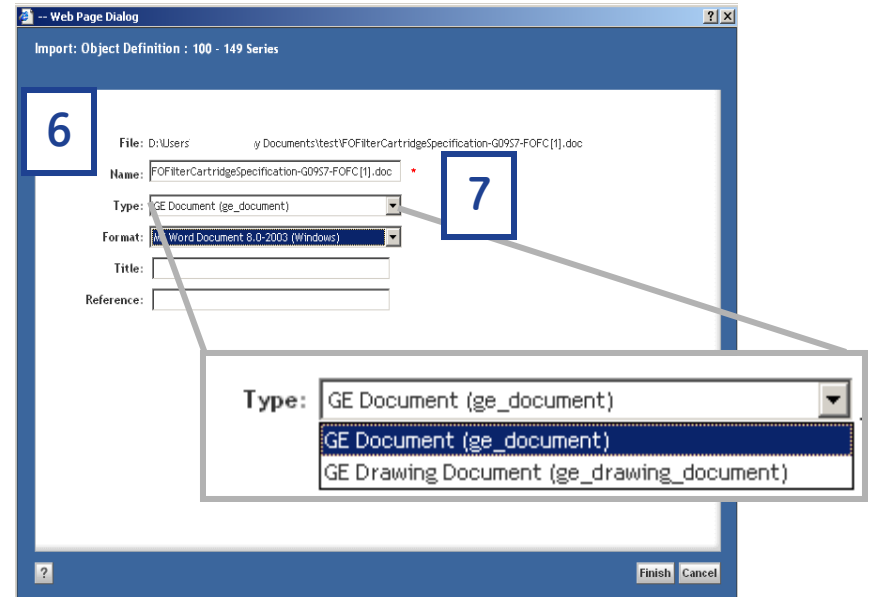
Revision	Level	Title	Created	Creator	Current State	Size	Modified	Modifier
			11/19/2009 8:48 AM			7 KB	11/19/2009 8:48 AM	
			11/13/2009 11:44 AM			477 KB	11/24/2009 4:55 PM	
			11/24/2					
			11/24/2					
			11/23/2					
			11/23/2					
			11/24/2					
			11/24/2					
			11/					

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



File Types:

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 ARE 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

File: D:\Documents and Settings\... Desktop\DCM Bus Segs.doc

Name: DCM Bus Segs.doc *

Type: GE Document (ge_document): Other Documents (Document Type Help

Format: MS Word Document 8.0-2003 (Windows)

Title: *

Reference:

ge_drawing_document (or Drawing or Specification)

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

File: D:\Documents and Setting\... Desktop\DCM Bus Segs.doc

Name: DCM Bus Segs.doc *

Type: GE Drawing Document (ge_drawing_document): Document Type Help

Format: MS Word Document 8.0-2003 (Windows)

Title: *

Drawing Number:

Sheet Number:

MLI / MDL Number:

Document Status Code:

Revision Level:

Revision Date: Date 12:00:00 AM *

Revision Notes:

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

Using Import Select File “Format”

File: D:\Users\...ocuments\test\FOFilterCartridgeSpecification-G0957-FOFC [1].doc

Name: FOFilterCartridgeSpecification-G0957-FOFC [1].doc

Type: GE Document (@_document)

Format: MS Word Document 8.0-2003 (Windows)

Title:

Reference:

Finish Cancel

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

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

Lock Ow	Lock Date	Name	Revision Level	Title	Created	Creator	Current State	Size	Modified	Modifier
		documentum			12/1/2009 3:26 PM				12/1/2009 3:26 PM	
		102056.pdf			11/19/2009 8:48 AM			7 KB	11/19/2009 8:48 AM	
		110E1290_A_D			11/13/2009 11:44 AM			472 KB	12/2/2009 10:53 AM	
		110E1290_A_A			11/24/2009 3:48 PM			472 KB	11/24/2009 4:55 PM	
		110E1290_A_A			11/24/2009 3:48 PM			332 KB	11/24/2009 3:48 PM	
		110E1290_A_A			11/24/2009 3:48 PM			83 KB	11/24/2009 3:48 PM	
		1207 Batter - a diff rev than			11/23/2009 3:46 PM			23 KB	11/23/2009 3:46 PM	
		1207 Batter - na			11/23/2009 3:46 PM		ew	23 KB	11/23/2009 3:48 PM	
		19400273_..._H			11/24/2009 3:48 PM			123 KB	11/24/2009 3:48 PM	
		19400273_..._H			11/24/2009 3:48 PM			94 KB	11/24/2009 3:48 PM	
		60 day issue			11/19/2009 2:47 PM			202 KB	11/19/2009 2:47 PM	
		IFA typical		ypical wts	11/24/2009 3:48 PM			47 KB	11/24/2009 3:48 PM	
		ksa072409...			12/2/2009 4:32 PM			223 KB	12/2/2009 4:32 PM	
		ksa072409...			12/2/2009 4:32 PM			223 KB	12/2/2009 4:32 PM	
		DG Process I			11/17/2009 4:52 PM			555 KB	11/17/2009 4:52 PM	
		DG TH.doc			11/17/2009 4:52 PM			27 KB	11/17/2009 4:52 PM	
		DG TH.doc			11/18/2009 4:20 PM			27 KB	11/18/2009 4:20 PM	
		DOCUMENTL_H			11/24/2009 3:48 PM			32 KB	11/24/2009 3:48 PM	
		File History...			11/12/2009 3:52 PM			297 KB	11/12/2009 3:52 PM	

Import successful

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.

The screenshot illustrates the steps to import a folder from a local drive into Documentum. It shows the Documentum interface with the 'File' menu open, the 'Import' option selected, and the 'Import: File Selection' dialog box open. The 'Add Folders' button is highlighted, and the 'Select Files' dialog box is also open, showing the 'OK' button highlighted.

Revision	Level	Title	Created	Creator	Current State	Size	Modified	Modifier
		Import	11/19/2009 8:48 AM			7 KB	11/19/2009 8:48 AM	
		Export	11/13/2009 11:44 AM			477 KB	11/24/2009 4:55 PM	
		Delete	11/24/2					
		Delete	11/24/2					
		Delete	11/24/2					
		Delete	11/24/2					
		Delete	11/23/2					
		Delete	11/23/2					
		Delete	11/24/2					
		Delete	11/24/2					
		Delete	11/19/2					
		Delete	11/24/2					
		Delete	11/24/2					

Using Import Set Attributes

Attributes can be set for folder being Imported or for each of document within folder.

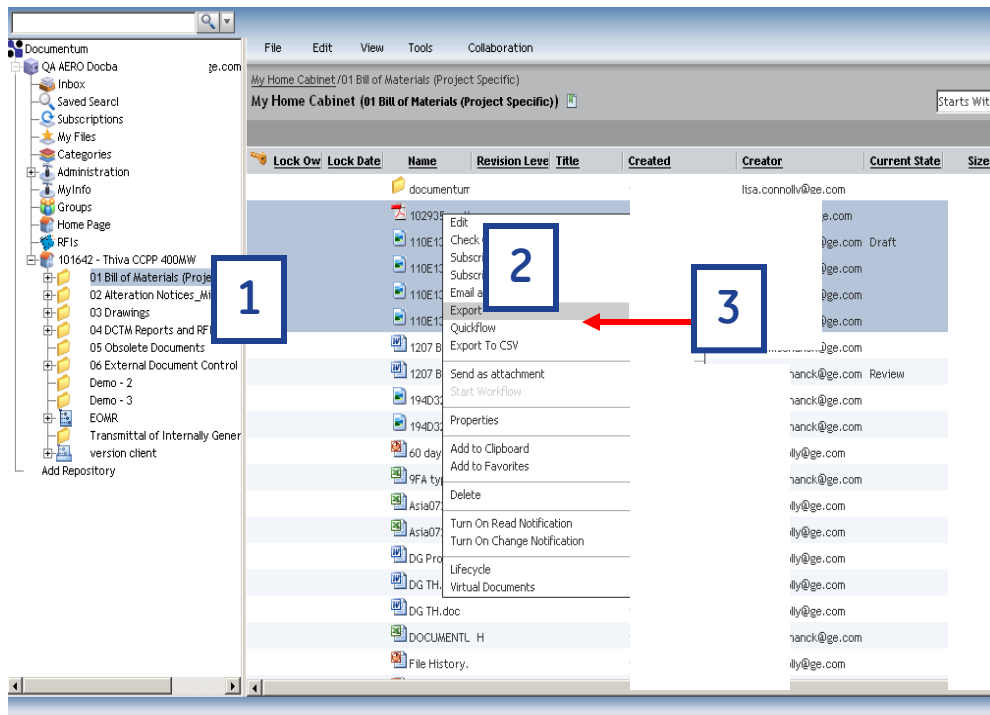
The image illustrates a multi-step process for setting attributes on imported folders. It consists of three main screenshots connected by arrows, with numbered callouts (5-9) indicating specific actions:

- 5:** In the 'Import: File Selection' dialog, the folder 'documentum' is selected in the 'Selected Files/Folders' list, and the 'Add Folders' button is highlighted.
- 6:** The 'Folder Attributes' tab is selected in the configuration window.
- 7:** The configuration fields are filled out: File (D:\User\My Documents\documentum), Name (documentum), Type (GE Folder (ge_folder)), Title, Subject, and Keywords (Edit).
- 8:** The 'Next' or 'Finish' button is highlighted in the configuration window.
- 9:** In the 'Confirm' dialog, the 'Continue' button is highlighted.

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

Export File

Select Files for Export



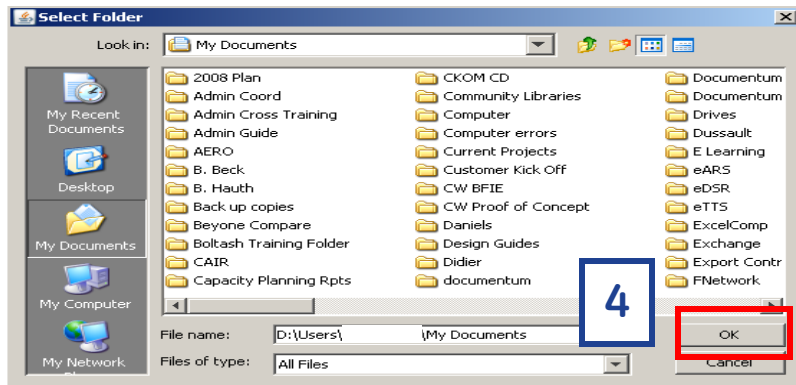
Export to save file copies to local drive

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

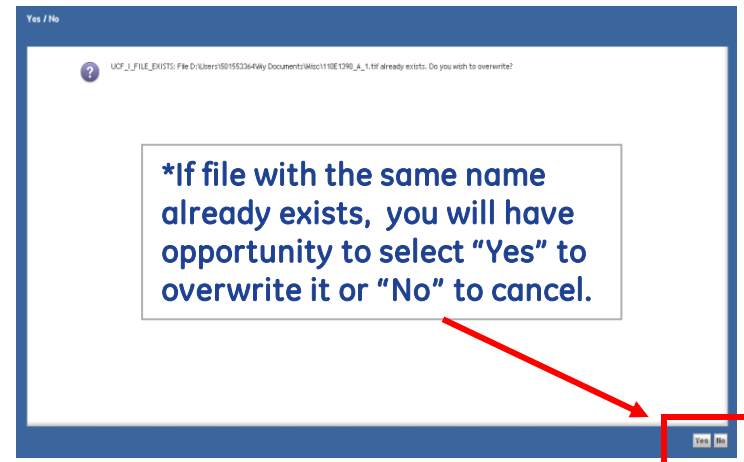
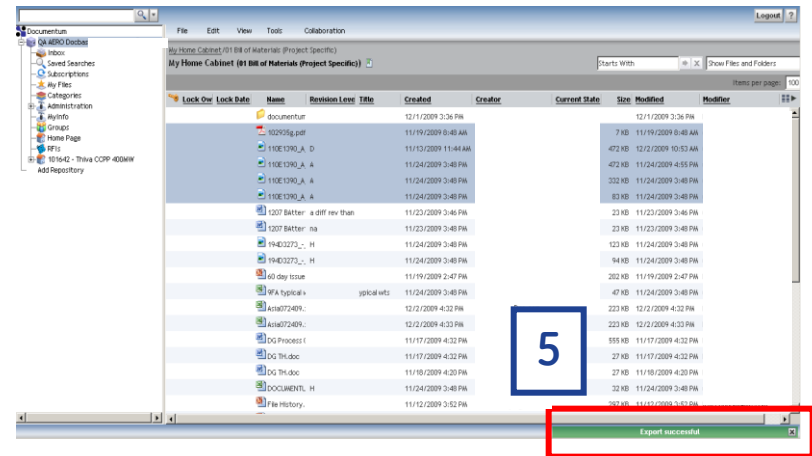
*Select multiple files by using "Shift+Click" or "Ctrl+Click".

Export File

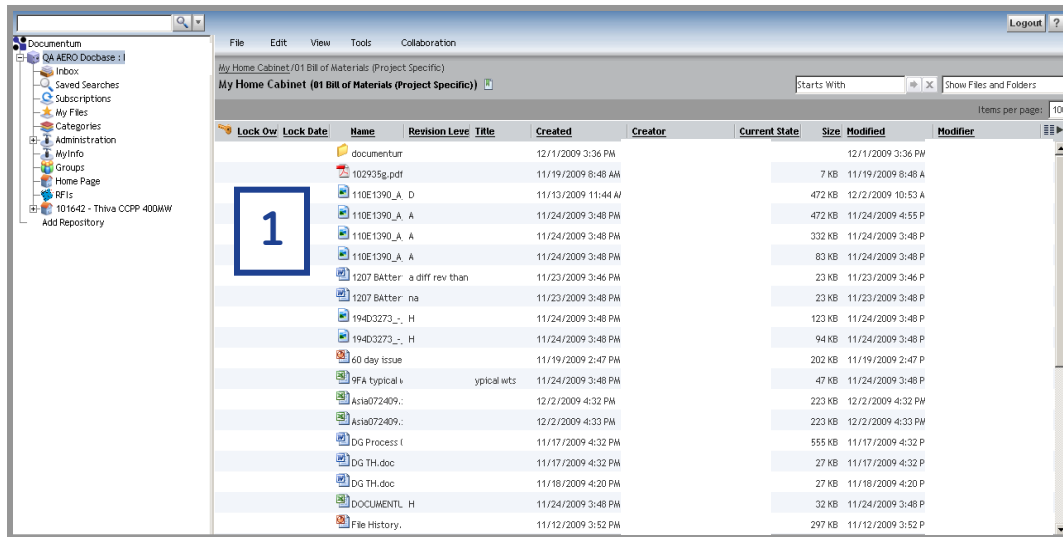
Select Files for Export



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

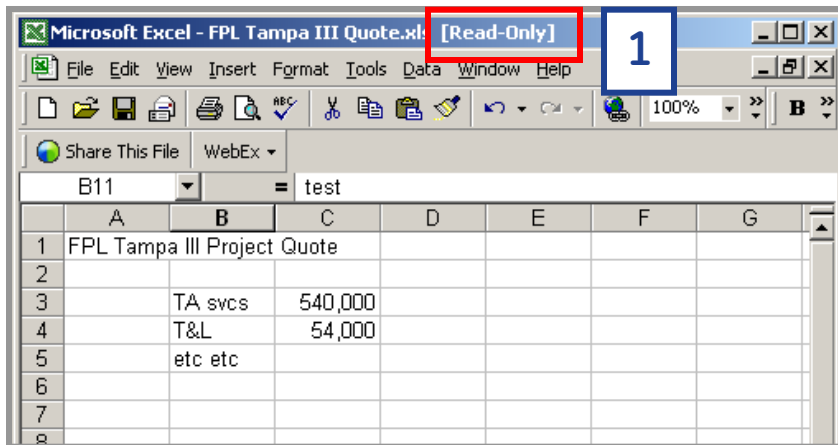


View Files (Read Only)



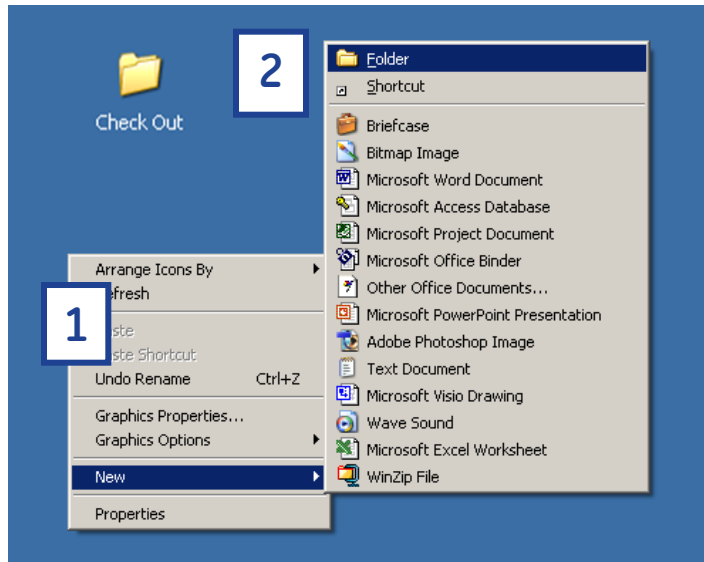
1. Double-click a file to open it “Read Only” in native application (.xls for Excel, etc.) *
2. The file may be saved in its application with the “Save As” function
3. Follow “Check Out / Check In” steps to create a version (revision) to the file (see next slides)

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



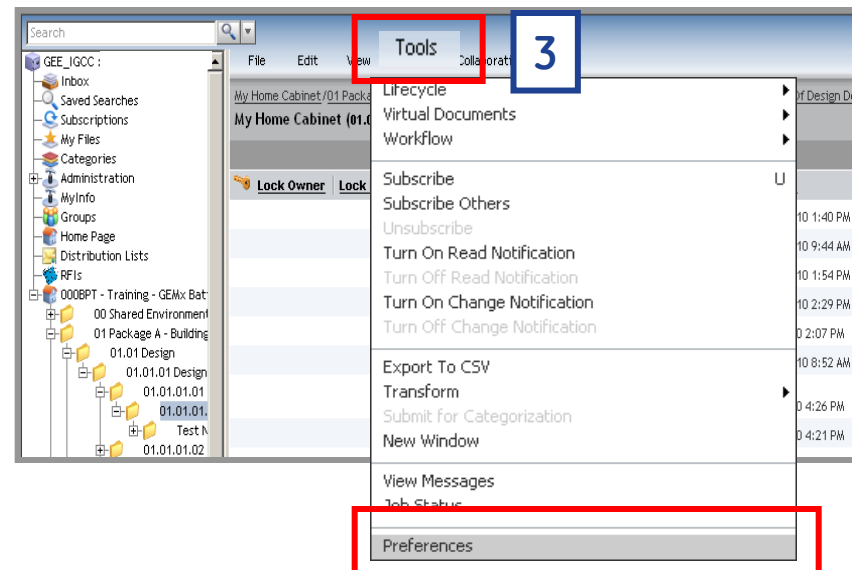
Revise for Version Control

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"

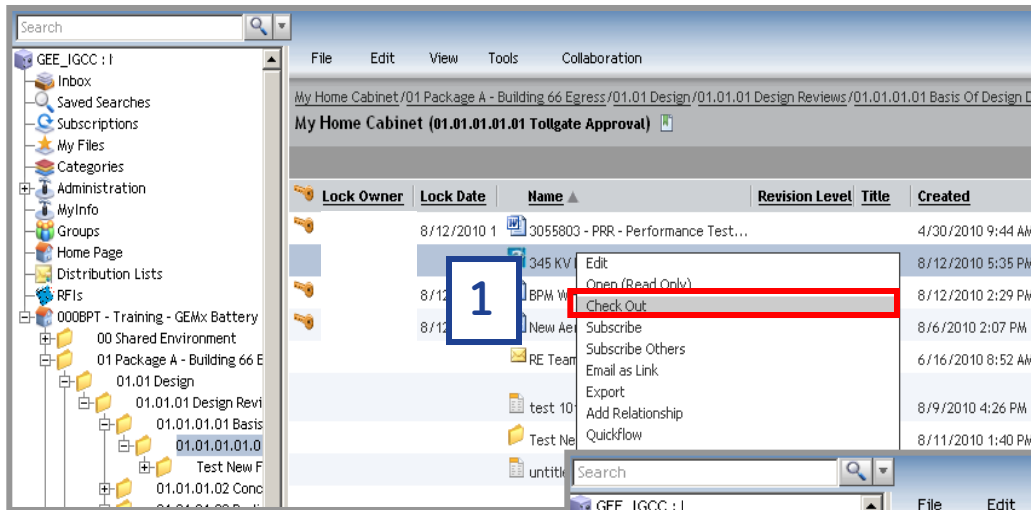


2. Name folder "Check Out"
3. Log in to Documentum, click "Tools" menu then "Preferences"

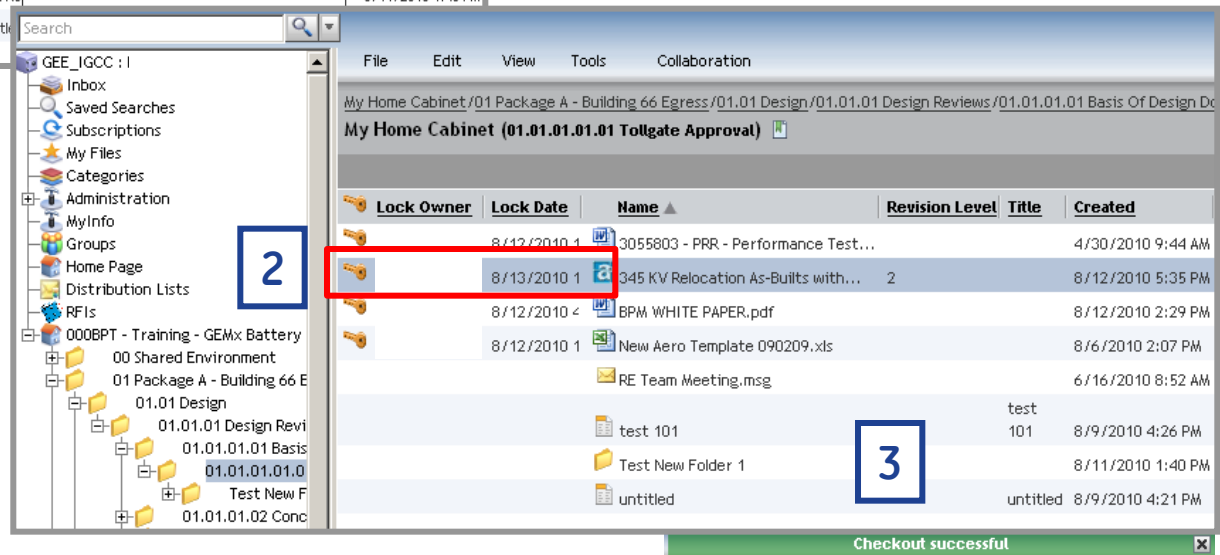
Revise for Version Control

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*

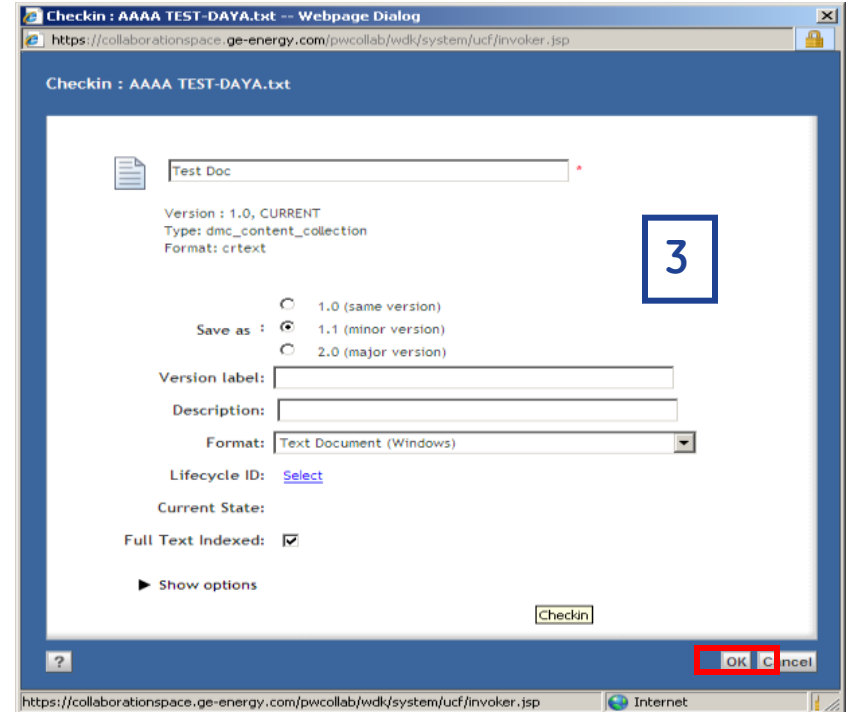
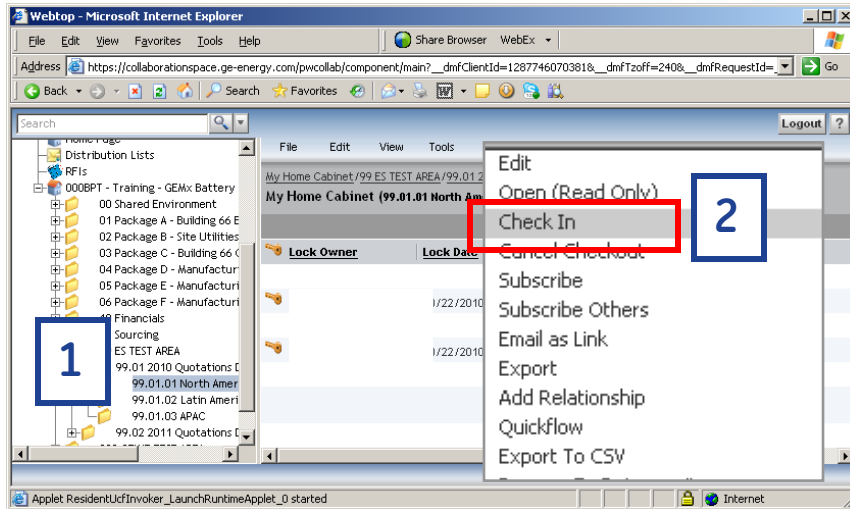


* Default Check Out folder location may be changed (see previous steps for details).



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.

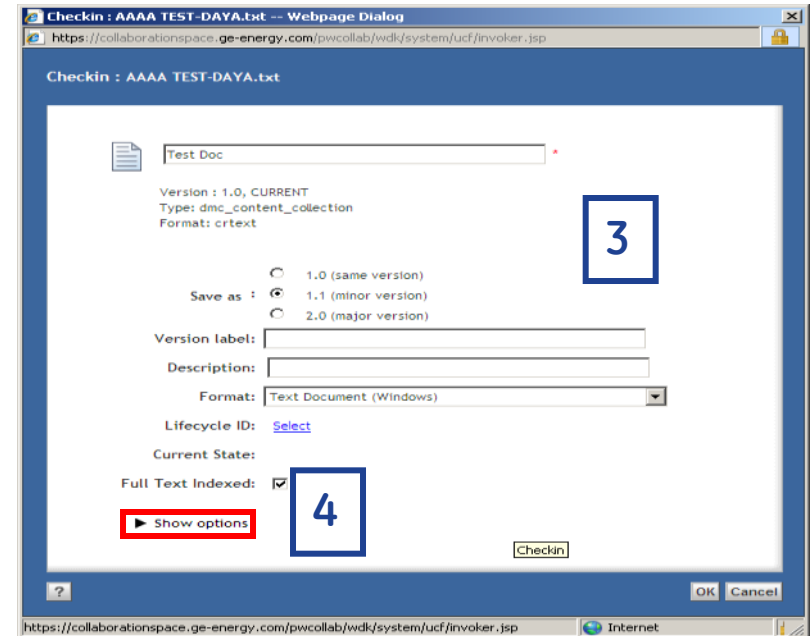
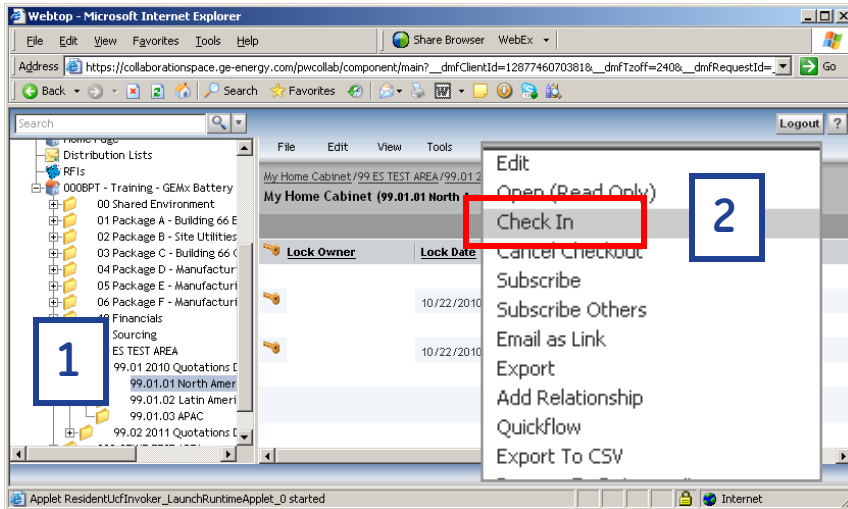
2. Right-click locked file and select "Check In"

3. Enter file attribute information, click "OK"

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

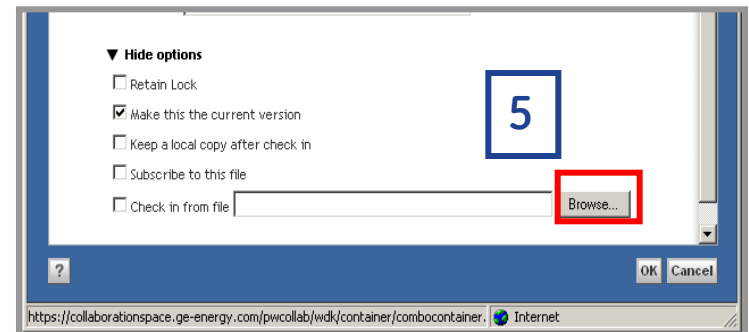
Revise for Version Control

Check In Files from Local Drive



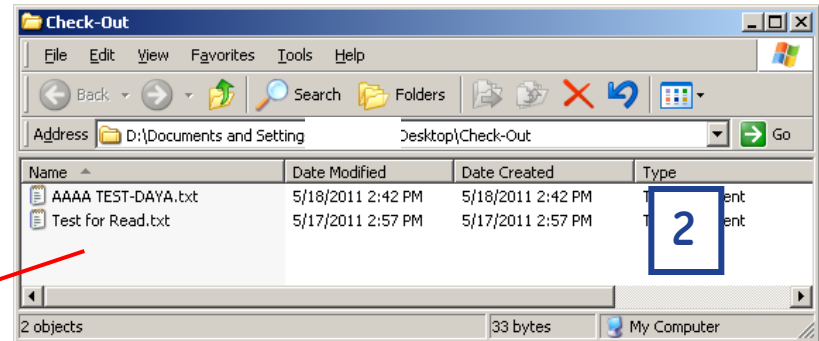
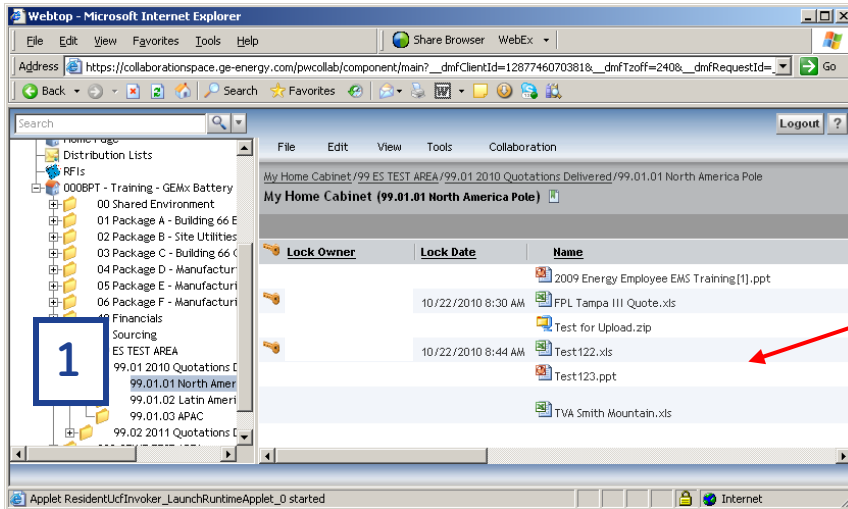
Check In Process #2: To check in a different file as a version (other than the file checked out)

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"



Revise for Version Control

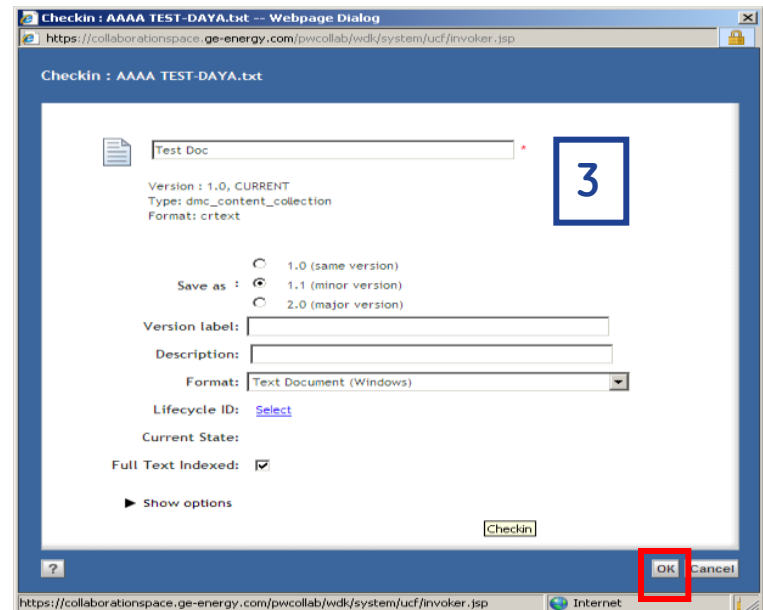
Check In Files from Local Drive



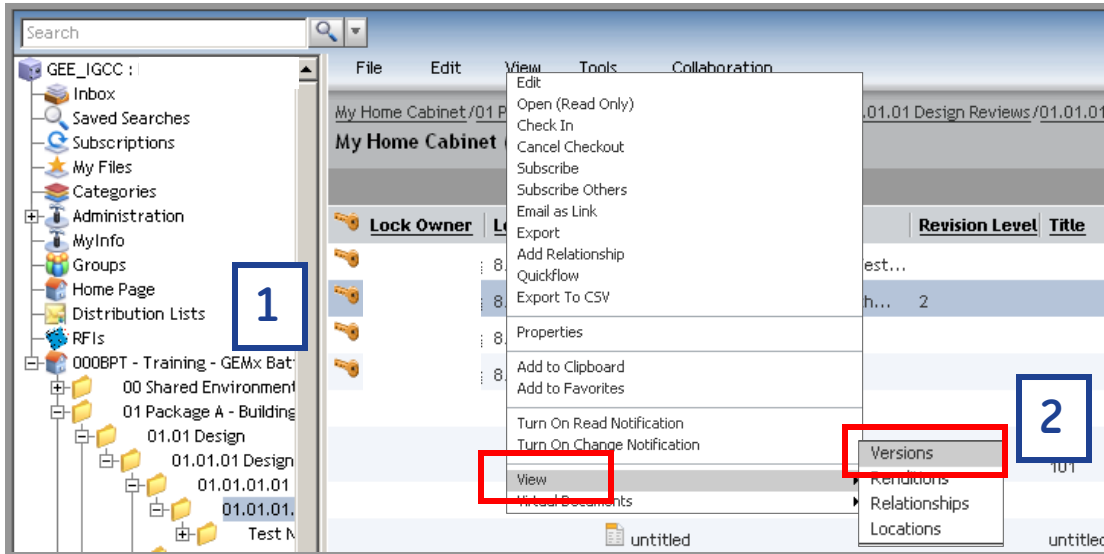
Use Check In Process #3: If you saved revised files in Check Out folder, you can use Drag & Drop

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 on top 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.



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

Version	Comments	Size	Format	Modified	Lock Owner	Path
2.0,CURRENT		38 KB	Drawin...	8/12/2010 5:35 PM		/000BPT - Training - GEMx Battery Plant Project/01...
1.0		38 KB	Drawin...	8/12/2010 5:27 PM		/000BPT - Training - GEMx Battery Plant Project/01 F...

Reviewing Versions

Version	Comments	Size	Format	Modified	Lock Owner	Path
2.0,CURRENT		38 KB	Drawin...	8/12/2010 5:35 PM		/000BPT - Training - GEMx Battery Plant Project/01
1.0		38 KB	Drawin...	8/12/2010 5:27 PM		/000BPT - Training - GEMx Battery Plant Project/01 F

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

File Edit View Tools Collaboration

GEE_IGCC: /000BPT - Training - GEMx Battery Plant Project/99 ES TEST AREA/99.01 2010 Quotations Delivered/99.01.01 North America Pole

99.01.01 North America Pole

Actions: Properties New Document New Workflow Template New Form New Folder Delete Subscribe Import Add to Clipboard Move Here Copy Here Link Here Email as Link View clipboard Start Workflow Process Report User Report New Window

Folders Items per page: 10

No folders found.

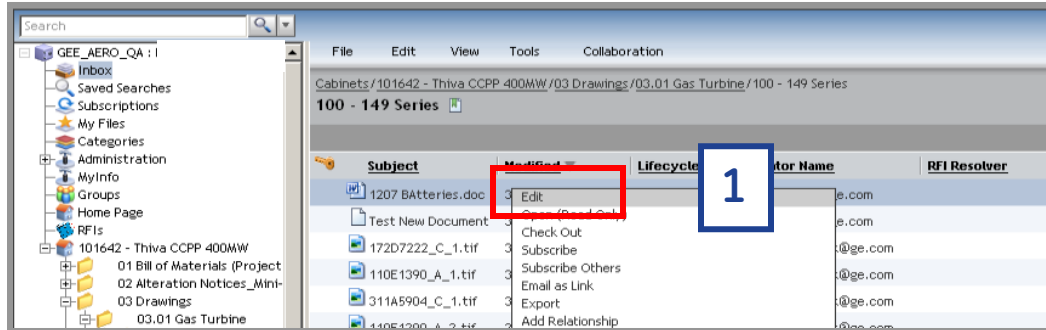
Files Items per page: 10 Show All Objects and Versions

Sort by: Name Format Size Modified Checked Out By Version

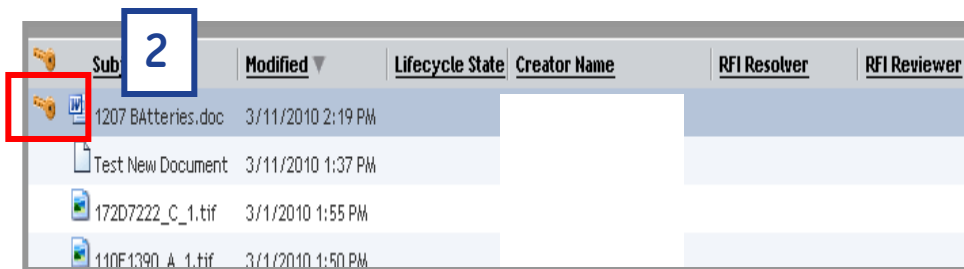
3055803 - PRR - Performance Test Scripts.doc	Check Out Edit Check In Cancel Checkout Add to Clipboard More...
Format: MS Word Document Size: 3.84 MB Modified: 4/30/2010 9:44 AM Checked Out By: lisa.connolly@ge.com Version: CURRENT,1.0	
345 KV Relocation As-Builts with ROW.dwg	Check Out Edit Check In Cancel Checkout Add to Clipboard More...
Format: AutoCAD Drawing Size: 38 KB Modified: 8/12/2010 5:27 PM Version: 1.0	
345 KV Relocation As-Builts with ROW.dwg	Check Out Edit Check In Cancel Checkout Add to Clipboard More...
Format: AutoCAD Drawing Size: 38 KB Modified: 8/12/2010 5:35 PM Version: CURRENT,2.0	

Edit Files

Check Out and Edit with One Click

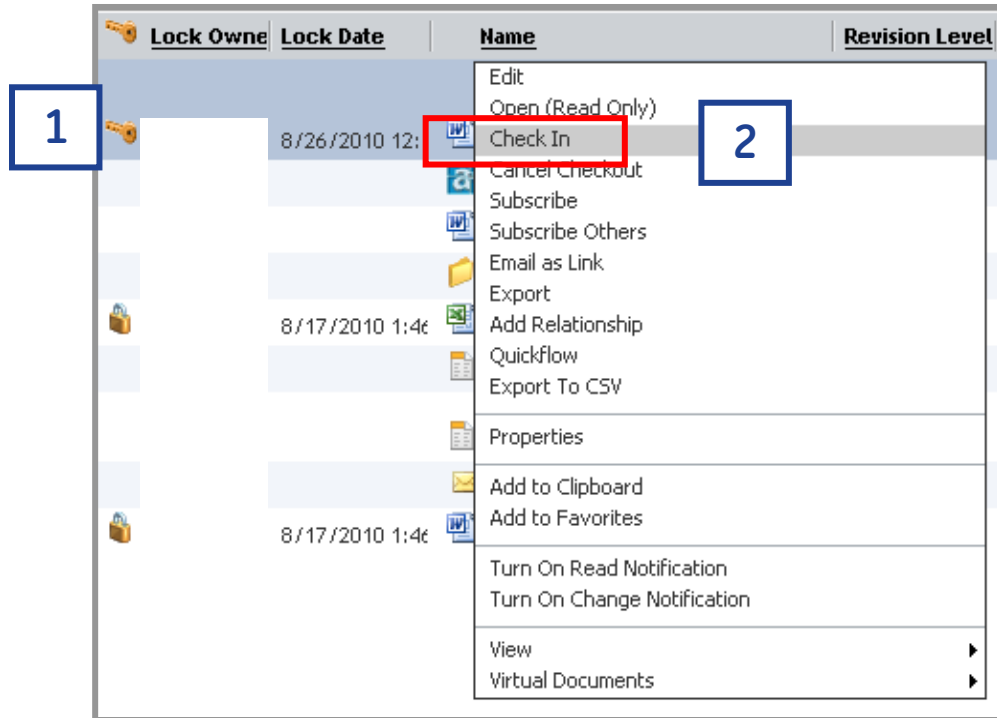


1. Select file & right-click, then select "Edit" from menu
2. File will be checked out, locked and will open in native application (.xls for Excel)
3. Revise and save file



Edit Files

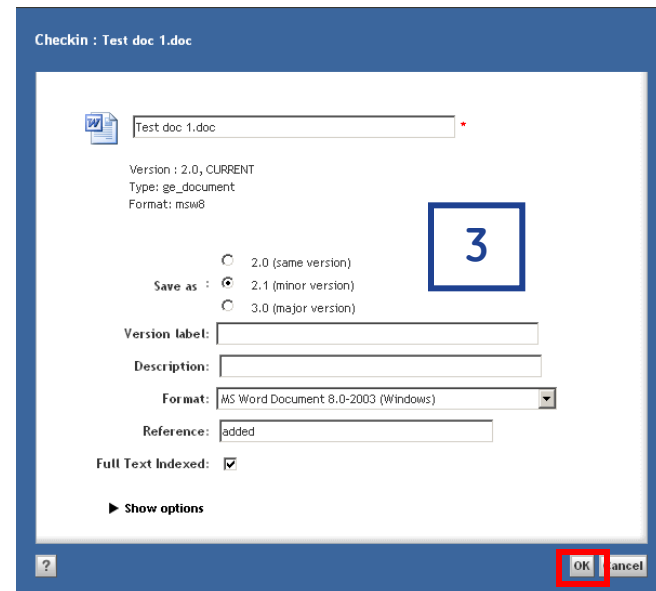
Check In Edited File



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

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



View File History

1

1

2

3

4

Lock	Lock On	Name	Revision Level	Modified	Version
		Training Docs		9/24/2010 2:47 PM	
		102935g.pdf		9/27/2010 3:03 PM	1.1,CURRENT
		102935g3.pdf	A	9/16/2010 12:23 PM	1.0,CURRENT
		102935gpdf.pdf		9/16/2010 12:23 PM	1.0,CURRENT
				9/16/2010 12:23 PM	1.0,CURRENT
			A	9/16/2010 12:23 PM	1.0,CURRENT
				9/16/2010 12:23 PM	1.0,CURRENT
			A	9/16/2010 12:23 PM	1.0,CURRENT

Properties: History

Info Permissions History

A098 outlet drawings sketch-1.pdf
Type: ge_document
Format: pdf

Selected version: 1.0,CURRENT

Event	User	Generated Source	Event Source	Date
dm_getfile		System-generated audit	System Unspecific	8/31/2010 4:50 AM
dm_getfile		System-generated audit	System Unspecific	8/31/2010 4:47 AM
dm_getfile		System-generated audit	System Unspecific	8/3/2010 7:40 AM
Setfile		System-generated audit	System Unspecific	8/3/2010 7:40 AM
Link		System-generated audit	System Unspecific	8/3/2010 7:40 AM
Save		System-generated audit	System Unspecific	8/3/2010 7:40 AM

OK Cancel

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