Glossary

Term	Definition
Accessibility	Access by everyone regardless of a disability such as visual impairment. For example, in the Accessibility Mode, Webtop menus are replaced with links along with descriptive text.
Activity	A definition of who does what in a workflow. When you design a workflow template, you specify a sequence of activities.
Administrator	The Documentum user responsible for installing and configuring Documentum to meet specific organizational requirements.
Approved	The state in the lifecycle of a content file prior to the active state. The content file becomes active on the effective date or when an approved content file is manually promoted.
Assembly	An object that is a snapshot of a virtual document's structure at a given point in time.
Attribute	Also known as a Property, this is a data item that describes an object of a given type.
Authoring Integration Services	Provides a set of standards-based services for seamless integration between the Documentum repository and the authoring tools people use to create and edit content. Authoring Integration Services supports some of the most popular file access protocols so that getting content into and out of Documentum is easier and requires minimal end user training.
Authorities	Justification for retention periods in retention policies.
Auto-Naming Schemes	Can be used to enforce naming guidelines for controlled documents. Auto-names are generated based on rules defined by an administrator. Auto-names can be applied at any state of a controlled document lifecycle.
Base Dates	Used to calculate retention time in retention policies.
Basic Permissions	Definitions of what actions users can take on objects in a Repository. The seven basic permissions in hierarchical order are: NONE, BROWSE, READ, RELATE, VERSION, WRITE, and DELETE
Binding Rule	A rule that identifies which version of a component to include in your virtual document.
Business Application	The core foundational element of Documentum Compliance Manager. They define high level business rules for managing controlled documents and default properties for document classes. They contain one or more document classes.
Check In	The process of saving any changes to an object's content in a Repository and unlocking the object.

Check Out	The process of taking a document from the Repository to your Local Files or Checked Out Files folder and locking it in the Repository.
Child Document	A descendent component of a virtual document.
Client Capability	Is an attribute of a Documentum user that determines what he/she can do from a client application. For example, a user with the capability of a Consumer can only search and view content as needed. A Contributor, on the other hand, can create content.
Comment	Also known as an Annotation. It is a note that is attached as a virtual sticky note to a PDF (portable display format) file.
Component	Each document added to a virtual document.
Compound Document	A type of virtual document in which the child documents are defined within and derived from the content of the parent virtual document.
Conditions	Events that trigger retention promotion in retention policies.
Contacts	Users involved in the retention process.
Containment Policies	Rules that govern the structure of a file plan in Records Manager.
Content	Anything that best conveys information to the user and is stored electronically as a file of a particular type such as a document, Web page or an XML document.
Content Management	The automated control of content of various formats from initial creation to final archiving. It includes dynamic assembly and personalized delivery to users on a global basis.
Content Server	Documentum's core server technology, which governs the content repository and enables a rich set of content management services for controlling both content and processes throughout and between distributed enterprises. Through capabilities such as integrated workflow, process automation, robust security, lifecycle services, and a data dictionary for capturing and configuring business rules and best practices, Content Server makes it easy to define, organize, and monitor all the functions and tasks involved in creating and delivering trusted content.
Controlled Document	Documents managed by Documentum Compliance Manager. They belong to a document class and advance through a series of DCM lifecycle states. They typically undergo review and signoffs. They become Effective when approved and Retired or Obsolete when replaced or go out of date. They are subject to regulatory controls and internal business policies.
DA	See Documentum Administrator.
DAM	See Digital Asset Manager.
DCE	See Documentum Collaborative Edition.

DCM	See Documentum Compliance Manager.
Deep Copy	Making a copy of a virtual document that includes the root and all components of the virtual document.
Deployment Manager	This is Web Publisher's GUI utility used to manage the deployment of Web sites.
Descendent	Any virtual document component other than the root document.
Digital Asset Manager	A Webtop-based application that allows users working with images, audio and video to manage such digital content using functionality such as thumbnails, storyboards, and streaming. Integrations with authoring tools that support WebDAV are also available.
Disposition	Occurs when records reach the final phase of a retention lifecycle.
Docbase	A repository of documents on a server. A Docbase stores a document's content as well as its properties. (Also Repository)
Docbase Administrator	A user that completes Docbase administrative tasks.
Document	An object in a Repository. It may be of any data type including text, graphics, video, audio or even an executable program. A document may be related to other documents in the Repository and contain information about its origin and identity.
Document Class	Define how a controlled document is to be managed by Documentum Compliance Manager. They are associated with object types and lifecycles. They inherit properties and business rules from a business application. All controlled documents must belong to a document class.
Documentum Administrator	A client product with a Webtop-based user interface that allows the administering of all repositories, servers, users, and groups, regardless of their location across the enterprise.
Documentum Collaborative Edition	A client application that allows teams to work securely and collaboratively within Web applications that use EMC Documentum's open architecture. You can provide secure "locations" for users to conduct and store work in content applications; add online, threaded discussions "in context" to any content object in the repository including folders, notes, documents, and rooms; create notes directly in a folder or room with the Web-based rich-text editor;and capture and express the context of a folder's hierarchy for navigation and in-line, end-user help.

Documentum Compliance Manager	A Documentum client application that offers an automated and integrated online environment for creating, reviewing, revising, approving, distributing and auditing controlled content. DCM can audit all controlled content activities enabling relevant users to know when and why changes were made. With DCM, you can easily respond to external regulatory agencies and internal auditors; quickly determine who has interacted with content, as well as when and why; detect attempts to alter or remove documents; enforce signatures and proper approvals; ensure content authenticity; and ensure document retention for required periods.
DQL	**D**ocumentum **Q**uery **L**anguage. It is a SQL-like language that allows the client to query the Repository. It provides additional content management-specific extensions to SQL.
Draft	The initial state of a workflow template.
EDMS	**E**nterprise **D**ocument **M**anagement **S**ystem. It manages the changes and availability of business-critical documents and provides automated control of document lifecycles and workflows.
eRoom	A digital workplace for distributed teams to collaborate on content and processes. This application includes features like project planning tools, discussion threads, and drag-and-drop file sharing.
Event Notification	An item in your inbox that notifies you when an event has occurred in the repository.
Extended Permissions	The definition of actions individuals can take on specific objects beyond the actions allowed by basic permissions. These include Change Location, Change Owner, Change Permission, Run Procedure and Change State.
File Format	The type of file often indicated by the file extension to the right of the period.
File Plan	Structured folder hierarchy used to categorize and organize formal records.
Flow	The movement of packages, their properties, and dependencies between connected activities in a workflow template.
Folder	The repository location for documents such as Web pages and other files. The repository stores these items in a hierarchy of folders.
Formal Record	Any document that is explicitly declared as a formal record. Managed in Records Manager.
Freeze	To lock an assembly so that no one can edit the components or modify the structure of the assembly.
Full-Text Index	An index of words in all documents that Repository users have asked to include in the index.

Group	A set of users. The users in a group can be individual users, groups of users or a combination of both.
Inbox	An electronic repository for items that require your attention.
Informal Record	Any document in the repository that has at least one RM/RPS policy applied to it.
Informal Review	In an informal review, you send a content file to another user for review without using a predefined workflow.
Initiation	Sometimes known as Instantiation, this is the act of creating a workflow object from a workflow template.
Inline Assembly	An assembly created within a virtual document or assembly.
Installed	One of the three allowable states for a workflow template.
Keyword	A property of a content file that can be used to locate the content file in a search.
LDAP	**L**ightweight **D**irectory **A**ccess **P**rotocol. A server using LDAP allows users to access information on a network including the names of people, shared resources such as printers, and documents. It differs from DNS in that it uses more "natural" directory entries rather than domain names and their corresponding IP addresses.
Lifecycle	A process that allows users to move a document through a series of stages defining the object's life.
Lifecycle Extension	A feature of Documentum Compliance Manager that extends basic lifecycle functionality. Lifecycle extensions define rules on a per-state basis: promotion rules, lists of approvers, distribution lists, workflows, and overrides.
Lifecycle State	A stage in the lifecycle of a document characterized by a particular a set of properties, security, ownership, location, and content. For example, the typical states in a Web Publisher lifecycle are Staging, Effective, Active, and Expired.
Link	The act of creating a connection between objects.
Local Copy	A read-only file that is copied from a Repository and pasted to the Local Files folder without being checked out of the Repository.
Local Files	Documents stored in your Local Files folder, including local copies and checked-out files.
Local Files Folder	A folder on your desktop computer containing checked-out files and local copies.

Lock	Locks ensure that only one person edits a content file at a time. When you're editing a content file from the Repository, the content file is automatically locked so that no one else can edit it. The lock remains on the content file until you unlock it. When a content file is locked, other users can view it. When they do, they see the version most recently saved to the Repository.
Multiple Sequential Performers	Performers of an activity in a workflow that carry out that activity's work sequentially. Each sequential performer has the option of rejecting a task to the previous sequential performer or to the performer of the previous activity.
Naming Policies	Rules that govern how file plan elements are labeled in Records Manager.
Navigation Path	The path used by content authors and content managers in Web Publisher to navigate through the Repository.
Object	An entity that can be manipulated by the Content Server, client applications, and server users. In Documentum, all items such as documents, folders, cabinets, Smart Lists, workflow templates, permission sets, replicas and even users are objects. All objects have associated descriptive characteristics, called attributes, and associated operations, called methods.
Object Type	A category of objects stored in a Repository. An object type inherits properties from its supertype. The additions or modifications you make to these properties define the object type.
Offline Client	Installed optionally, this application enables users to work on content locally while being disconnected from the Repository.
Package	A container for the documents, folders or virtual documents that are routed in a workflow.
Palette	The location in Workflow Manager of activity and workflow objects that are used to build workflow templates.
Parent Document	Any component of a virtual document that has descendents.
Performer	A user or group in your company that is assigned an activity to perform in a workflow.
Permission	A property that determines what operations users can perform on an object (for example, view, edit, or delete).
Permission Set	A list of entries describing the permission levels for individuals and groups.
Placeholder	A no-content document that reserves a location in a virtual document for a content file to be created later.
Policy	A business logic configuration object that defines how a record is to be treated within Records Manager.

PowerPoint Assembly	A holding area that allows you to collect slides from one or more PowerPoint presentations in the repository and reassemble them into new presentations.
Presets	A feature of Documentum Webtop that enables you to limit the selections or actions available for a given user, location, or object type/ Presets constrain, focus, and tailor the user experience. They helps to configure Webtop down from a general-purpose Documentum client to a more domain-specific or task-focused client.
Privilege	A property that determines what sets of permissions are assigned to users.
Promotion	Progression from the end of a retention phase to the next phase of a retention policy.
Property	Also known as an Attribute, this is a characteristic of an object in the Repository. A Repository object can have many different properties associated with it. Each property can take on multiple values. For example, the format property could take on the value of .htm, .doc, or .xsl.
Records Manager Administrator	A Documentum client that is built on top of Documentum Webtop and is integrated with Retention Policy Services (RPS) for total records management (records and formal records). This combination of records management integrates the use of lifecycles and retention policies into the management of your records.
Relationship Type	Defines dependencies between controlled documents. Relationship types are used to tie content together between related documents and define approval and promotion rules for related documents.
Rendition	A copy of a content file that differs from the original only in the format of the content.
Repository	A repository (formerly known as Docbase) stores a document's content as well as its properties.
Restrictive Markings	A user must be a member of all restrictive marking groups to access a record in Records Manager.
Retention Policies	Define rules that govern the retention of records in Records Manager including how long records must be retained and how records should be disposed at the end of a retention period.
RMA	See Records Manager Administrator.

Role	A group containing a set of users, other groups, or both that are assigned a particular role within a client application domain. The client application is responsible for determining the role to which the user belongs and ensuring that the user performs only the actions allowed for members of that role. Documentum Compliance Manager uses roles extensively to determine functional capabilities of users in the system. Roles are a convenient way of grouping users with similar responsibilities. Application functionality is restricted by the role capabilities.
Root Document	The document on which you base your virtual document.
RPS	**R**etention **P**olicy **S**ervices (see Records Manager Administrator).
Security Level	A user must have the appropriate security level to access a record in Records Manager.
Security Policies	Applied to cabinets, folders, and records to extend records security in Records Manager.
Shared Markings	A user must be a member of at least one shared marking group to access a record in Records Manager.
Shortcut	A pointer to an object located in the Repository. Shortcuts allow quick and easy access to objects.
Smart List	A saved, reusable list of search criteria.
Staging	A lifecycle state in which content file resides between the development stage and the production stage.
Superuser	The highest user privilege level in the Documentum system. A superuser can read any object and change the permissions set for a user of any object.
Symbolic Label	A user-defined label that provides additional meaning to a numbered label.
System Administrator	The second highest user privilege level in Documentum security.
Task	A run-time representation of an activity in a workflow.
Task Manager	A feature that enables you to perform a task that has been assigned to you by a workflow.
Transformation	An automated rendering of a file from one look or format to another. Enables you to automatically transform the look and format of an existing file in order to create a new rendition for the object or a new object that is related to the original object. Enables you to store a file in multiple formats, sizes, orientations, etc.
Type	A template for an object. An object type is defined by its properties and methods. An object is an instance of a type.
Unfreeze	To unlock an assembly so that the structure of the assembly can be modified and the component documents edited.

Unlink	To break a connection to a document so that the document no longer appears in given location. This definition does not apply to workflow objects.
Version Labels	Words (symbolic labels) and numbers (implicit labels) assigned to a document to indicate a particular version's place in a sequence of document versions.
Viewer	The middle window of the workflow template designer.
Virtual Document	A document composed of other documents.
Web Publisher	An "out of the box" browser-based tool for creating and updating Web content in a highly efficient and scalable manner, engaging all users across the enterprise. The integration to standard authoring tools allows contributors to work in familiar desktop environments and empowers non-technical users to create Web content without requiring them to understand HTML or XML.
Web Publisher Editor	The tool to enable Web Publisher users such as content authors of Web pages to enter content. Web Publisher Editor is a combination of the rules file and content templates created in Web Publisher.
Webtop	Provides an easy-to-use, easy-to-configure, Web-based interface built on WDK technology for accessing Documentum content management capabilities.
Workflow	A business process that passes documents, information, and tasks from one person to another person in flowed procedures that achieve a particular goal.
Workflow Manager	A Documentum tool used to design workflow templates.
Workflow Template	A reusable network of activities and relationships between the activities, from which workflows are started.
XML	e**X**tensible **M**arkup **L**anguage. XML is the Web page language that unlike HTML allows the separation of content and presentation. XML allows the creation of custom tags to structure the content.