Starting and Using Webtop

To log in to a repository:

1. Access the **Login URL**.
2. Enter your **Login Name** and **Password**.
3. Select a **Repository**.
4. Click **Login**.

To change your password:

1. Access the **Login** dialog.
2. Click **More Options** if the **Change Password** button is not already displayed.
3. Click the **Change Password** button.
4. Enter your **current password** and your **new password** and click **Apply**.

To log out of a repository:

1. Click the **Logout** button on the banner.

To change the columns displayed in the content pane:

1. Click the **Preferences** button.
2. Click the **Columns** tab.
3. Click the **Edit** link next to the set of columns you want to change.
4. Add and remove columns using the **right** and **left arrows**.
5. Use the **up** and **down arrows** to change the display order.
6. When finished, click **OK**.
7. When finished editing all columns, click **OK**.

Creating Content (1 of 2)

To create a new folder:

1. Browse to the folder or cabinet where you want to create the folder.
2. Select **File** > **New** > **Folder** from the menu.
3. On the **New Folder: Create** screen, enter the **Name** and select the **Type** for the folder (typically Folder).
4. Click **Finish**.

To create a new document:

1. Browse to the folder where you want the document to initially appear.
2. Choose **File** > **New** > **Document** from the menu.
3. On the **New Document: Create** screen, enter the **Name** and select the **Type**, **Format**, and **Template** for the document.
4. Click **Finish** to launch appropriate editing application.
5. In the editing application, save your new document and close the editing application.
6. In Webtop, check the box next to your document to select it.
7. Choose **File** > **Check In** from the menu.
8. On the **Checkin** screen, click **OK** to save the document in the repository.

To import existing objects:

1. Browse to the folder where you want the imported document to initially appear.
2. Choose **File** > **Import** from the menu.
3. On the **Import** screen, click **Add Files** to browse the local file system.
4. Select the file(s) and click **OK**.
5. When you have finished selecting the files, click **Next**.
6. Enter the **Name** and select a **Type** and **Format** for the imported document. Repeat for each document you are importing.
7. Click **Finish** to transfer the document to the repository.

Creating Content (2 of 2)

To export content:

1. Select the object or objects that you want to export.
2. Select **File > Export** from the menu.
3. In the **Select Folder** dialog box, browse to the folder on your local computer where you want to copy the object and click **OK**.

To export information about a location or search result:

1. Navigate to the list you want to export.
2. Select **Tools > Export To CSV** from the menu.
3. Select which columns you want to export. All columns are selected by default.
4. Rearrange the column order as desired.
5. Click **OK**.
6. Select whether to view (**Open**) or save (**Save**) the file.
7. If you chose to save the file, select the desired location.

To enable drag and drop:

1. Click the **Preferences** button.
2. On the **General** tab, select the **Drag and Drop** check box.
3. Click **OK**.
4. Click **Install** to install the plug-in.
5. Close and restart the browser.

To import content into the repository using drag and drop:

1. Select the files and/or folders on your local computer.
2. Drag the selection and drop it onto a folder in Webtop.
3. When prompted, enter the information for each added folder or file, or click **Finish** to accept the defaults for all imported content.

To export content from the repository using drag and drop:

1. Select an object in Webtop by clicking it.
2. Drag the document and drop it into a folder on your local file system.

Finding Content (1 of 2)

To perform a simple search:

1. Enter the search word(s) in the **Search** field.
   Note: Simple search is case sensitive when full-text indexing is not implemented.
2. Click **Search**. The results are displayed in the content pane.

To perform an advanced search:

1. Click the arrow next to the **Search** button and click **Advanced**. The **Advanced Search** screen displays.
2. Enter the desired search parameters.
3. Click **Search.** The results are displayed in the content pane.

To configure specific property conditions:

1. A row of property parameters is displayed on the **Advanced Search** screen.
2. Select a **property** from the first list.
3. Select an **operator** from the second list.
4. Enter search **criteria** in the final field.
5. Click the **Add another property** link to add multiple conditions.
6. When finished, click **Search**.

To view the most recent results without re-launching:

1. Click the arrow next to the **Search** button.
2. Click **Last Results**.

To edit a search:

1. After search results are returned, click the **Edit Search** icon. The **Advanced Search** screen is displayed.
2. Edit the search criteria.
3. When finished, click **Search**.

Finding Content (2 of 2)

To save a search:

1. After search results are returned, click the **Save Search** icon. The **Saving Your Search** screen is displayed.
2. Enter a **Name** and **Description** for the saved search.
3. Select to **Include Results** or **Make Public**.
4. When finished, click **OK**.

To access saved searches:

1. Click the **Searches** node.

To manage saved searches:

1. Click the **Searches** node.
2. Right-click the saved search and select **Search** from the pop-up menu to view the results of a saved search.
3. Right-click the saved search and select **Edit** from the pop-up menu to edit the criteria for a saved search.
4. Right-click the saved search and select **Delete** from the pop-up menu to delete a saved search.

Managing Content

To check out an object:

1. Select the desired object.
2. Select **File** > **Check Out** from the menu. A lock will be placed on the object.

To cancel a checkout:

1. Select the desired checked out object.
2. Select **File** > **Cancel Checkout** from the menu. The object will be saved without any of the changes made to it while it was checked out.

To edit an object:

1. Select the desired object.
2. Select **File** > **Edit** from the menu. A lock will be placed on the object and the appropriate editing application will launch.

To check in an object:

1. Select the desired checked out object.
2. Select **File** > **Check In** from the menu. The **Checkin** screen is displayed.
3. Update any desired properties and click **OK.**

To view all versions of an object:

1. Select the desired object.
2. Select **View** > **Versions** from the menu.

To delete content:

1. Select the object to be deleted.
2. Select **Edit** > **Delete** from the menu.
3. Select whether you want to delete all versions or only the selected version.
4. Click **OK**.

Changing Content Location

To move content:

1. Select the object to be moved.
2. Select **Edit** > **Add to Clipboard** from the menu.
3. Navigate to the destination folder.
4. Select **Edit** > **Move Here** from the menu.

To link content (have it appear in multiple locations):

1. Select the object to be linked.
2. Select **Edit** > **Add to Clipboard** from the menu.
3. Navigate to one or more destination folders.
4. For each folder, select **Edit** > **Link Here** from the menu.

To copy content to a different folder:

1. Select the object to be copied.
2. Select **Edit** > **Add to Clipboard** from the menu.
3. Navigate to the destination folder.
4. Select **Edit** > **Copy Here** from the menu. The selected object is duplicated in the destination folder as a new object with version number 1.0.

Using the Clipboard

To add an object to the clipboard:

1. Select the desired object.
2. Select **Edit** > **Add to Clipboard** from the menu.

To view the clipboard:

1. Select **Edit** > **View Clipboard** from the menu.
2. To close the clipboard, click the **Close** button.

To remove an object from the clipboard:

1. Select **Edit** > **View Clipboard** from the menu.
2. Select the object you want to remove.
3. Click the **Remove** link.
4. Click the **Close** button.

Viewing Content

To view an object's properties:

1. Select the desired document.
2. Select **View** > **Properties** > **Info** from the menu.
   Note: You can also right-click and select **Properties** from the pop-up menu.

To view an object:

1. Select the desired document.
2. Select **File** > **View** from the menu.
   Note: You can also double-click an object link to open it.
3. The document is opened in the appropriate viewing application.

Subscriptions and Notifications

To subscribe to an object:

1. Select one or more objects.
2. Select **Tools** > **Subscribe** from the menu.
   If the **Subscribe** option is not available, then you have already subscribed to that object.

To unsubscribe to an object:

1. Select one or more objects.
2. Select **Tools** > **Unsubscribe** from the menu.

To subscribe another user to an object:

1. Select one or more objects.
2. Select **Tools** > **Subscribe Others** from the menu.
3. In the selection dialog box, select one or more users.
4. Click **OK**.

To turn on read notifications:

1. Select one or more objects.
2. Select **Tools** > **Turn On Read Notification** from the menu.
   When the object is viewed, exported, checked out, or edited, a notification will be sent to the Documentum Inbox.

To turn off read notifications:

1. Select the desired object.
2. Select **Tools** > **Turn Off Read Notification** from the menu.

To turn on change notifications:

1. Select one or more objects.
2. Select **Tools** > **Turn On Change Notification** from the menu.
   When the object is checked in, a notification will be sent to the Documentum Inbox.

To turn off change notifications:

1. Select the desired object.
2. Select **Tools** > **Turn Off Change Notification** from the menu.

Links

To add content to your browser favorites list:

1. Select the object that you want to add.
2. Select **File** > **Add to Favorites** from the menu.
3. In the **Add Favorite** dialog, select a folder and click **OK**.

To send an object as a web-link:

1. Select the desired document.
2. Select **File** > **Email as Web-link** from the menu.
   Your default email application is opened with a message that contains the web-link.

To create a link to an object:

1. View the **Properties** for the object
2. Click and drag the icon next to the object name to the desired destination.

Renditions and Annotations

To import a rendition:

1. Select the desired object.
2. Select **File > Import Rendition** from the menu.
3. On the **Import Rendition** dialog, browse the local file system to locate the rendition file.
4. Click **OK**.

To view an object's renditions:

1. Select the desired object.
2. Select **View > Renditions** from the menu.

To add a preferred rendition:

1. Click the **Preferences** button.
2. Click the **Formats** tab.
3. Click the **Add** link.
4. In the **Formats** dialog, select the desired format in the **Format for viewing** drop-down.
5. Click **OK**.

To view the PDF rendition of a document:

1. Select the object in the content pane.
2. Select **View > Renditions** from the menu.
3. Select the PDF document.
4. Select **File > View** from the menu.
   The PDF file is opened in Adobe Acrobat
5. Use the tools in Adobe Acrobat to add and edit annotations.

Relationships

To create a relationship between two objects:

1. Select the object you want to be the parent.
2. Right-click and select **Add Relationship** from the pop-up menu.
3. Select the object to relate.
4. Click **Next**.
5. Select the type of relationship from the **Relationship** drop-down.
6. Optionally add a **Description**.
7. Click **Finish**.

To view an object's relationships:

1. Select the desired object.
2. Select **View** > **Relationships** from the menu.

To remove an object relationship:

1. View the relationship for an object.
2. Select the object to remove.
3. Select **File** > **Remove Relationship** from the menu. The **Delete** dialog displays.
4. Click **OK**.

Lifecycles

To apply a lifecycle to an object:

1. Select the target object.
2. Select **Tools** > **Lifecycle** > **Apply** from the menu.
3. On the **Apply Lifecycle** screen, select the desired lifecycle and click **OK**.

To manually change lifecycle states:

1. Select the target object.
2. Select the desired state change from the **Tools** > **Lifecycle** menu: Promote, Demote, Detach, Suspend, or Resume.

Workflows

To start a workflow:

1. Select a document.
2. Choose **Tools** > **Workflow** > **Start Attachments** from the menu.
3. On the **Start Workflow** page, select a workflow template and click **OK**.
4. Enter a description of the workflow and any other required information and click **Finish**.

To view and act on a workflow task:

1. Browse to the Documentum **Inbox**.
2. Double-click the name of the task to view its details.
3. Perform the indicated task.
4. When finished with the task, click **Finish**.

To change your availability for workflow tasks:

1. At the top of the **Inbox**, click the **I am available** link.
2. Select the **check box** that changes your status to unavailable.
3. Click **edit** to select another user to receive your tasks.
4. Click **OK**.

Workflow Reporting:

1. Select **Tools** > **Workflow** > **Workflow Reporting** to view all workflows.
2. Select **Tools** > **Workflow** > **My Workflows** to view the workflows you own.

To send a quickflow:

1. Select the object you want to route.
2. Select **Tools** > **Workflow** > **Quickflow** from the menu. The **Quickflow** dialog displays.
3. Click the **Select user/group** link. The **Select User Or Group** dialog displays.
4. Select the users or groups and click **OK**. The **Quickflow** dialog displays again.
5. Select the **Priority**, type a message about the quickflow in the **Instructions** field, and select the desired delivery options.
6. When finished, click **OK**.

Documentum Security (1 of 2)

The basic permission levels are:

NONE: no access

BROWSE: view object properties

READ: view the content file of an object

RELATE: add comments to PDF or TIFF file

VERSION: modify an object and check it in as a new version

WRITE: modify an object and check it in as the same version

DELETE: delete an object

The extended permissions are:

Change Location: move an object to another folder

Change Owner: assign a new owner to an object

Change Permission: change an object's permission settings

Run Procedure: execute a procedure

Change State: change an object's lifecycle state

Extended Delete: grants DELETE permission only

To assign permissions sets:

1. View the target object's properties.
2. Click the **Permissions** tab to view the object's current permission settings.
3. Click the **Select** link next to **Permission set name**. The **Choose a permission set** dialog displays.
4. Select the desired **permission set** from the list.
5. Click **OK** to assign the permission set to the target document.
6. Click **OK** to finish.

Documentum Security (2 of 2)

To modify the permissions for an object:

1. View the target object's properties.
2. Click the **Permissions** tab to view the object's current permission settings.
3. Scroll down to the **Additional Permissions** section.
4. Click the **Add** link to add additional users or groups.
5. On the **Choose a user/group** dialog, select the desired users and groups from the list on the left and click the **right-facing arrow** to add them to the selection list on the right.
6. Click **OK**. For each user and group that was selected, the **Set Access Permissions** dialog displays.
7. Select a **Basic Permissions** level from the drop-down list.
8. Select the desired **Extended Permissions** options.
9. Click **Finish**.
10. Click **Continue** to apply to multiple users/groups. The **Permissions** dialog displays with the configured permission settings.
11. Click **OK** to save the modifications and close the **Properties** dialog.

To remove permissions from a user or group:

1. View the permissions for the object.
2. Select the user or group in the **Additional Permissions** section.
3. Click the **Remove** link.
4. Click **OK** to close the **Properties** dialog.

Presets (1 of 2)

To create a new preset:

1. Select the **Presets** node under **Administration**.
2. Select **File > New > Preset** from the menu. The **Presets editor** opens with the **Setup** tab displayed.
3. Enter a name for the preset in the **Preset Name** field.
4. Optionally, enter a description in the **Description** field.
5. To define the scope, click the **Select** button next to the items to which the preset will apply.
6. Select the desired item(s) and click **OK**. Selected items will display on the dialog.
7. Select whether the preset applies to all repositories or just the current one.
8. Click the **Next** button.
9. On the **Rules** tab, select the desired filter from the box on the left.

    9.1. For the **Actions** rule:

    - 9.1.1. Use the drop-down to select the menu option (**All**, **File**, **Edit**, **View**, **Tools**).
    - 9.1.2. Select the action to exclude from the list on the left.
    - 9.1.3. Click the **right-facing arrow** to move the selected actions to the **Excluded** list on the right.

    9.2. For the **Attributes** rule:

    - 9.2.1. Select the desired object type from the **Available Types** list.
    - 9.2.2. Select the desired property from the **Available Attributes** list.
    - 9.2.3. Type the value(s) to be available for that property in the **Value** field.
    - 9.2.4. Click the **right-facing arrow** to add the values to the **Current Value(s)** list.
    - 9.2.5. Click the **Apply** button.

    9.3. For the **Permissions** and **Groups** rules:

    - 9.3.1. Click the **Select** button.
    - 9.3.2. Search for and select the desired permissions or groups.
    - 9.3.3. Click **OK** to add the selections to the **Selected** list.

    9.4. For all other rules:

    - 9.4.1. Select the item to include from the list on the left.
    - 9.4.2. Click the **right-facing arrow** to add the actions to the **Selected** list on the right.

10. Click **Finish** when done defining the rules.

Presets (2 of 2)

To create a new preset based on a template:

1. Select the **Presets** node under **Administration**.
2. Select **File** > **New** > **Preset** from the menu.
3. Enter a name in the **Preset Name** field.
4. Click the **Select** button next to **Start with another preset**. The **Choose a preset** dialog displays.
5. Select the desired preset and click **OK**.
6. Assign desired users, locations, or types (scope).
7. Click **Next**.
8. Edit the rules for the new preset, if needed.
9. Click **Finish**.

To edit a preset:

1. Select the **Presets** node under **Administration**.
2. Select the desired preset.
3. Select **File** > **Edit** from the menu.
4. Edit the scope as desired.
5. Click **Next**.
6. Edit the defined preset rules as desired.
7. Click **Finish**.

To delete a preset:

1. Select the **Presets** node under **Administration**.
2. Select the desired preset.
3. Select **File** > **Delete** from the menu.
4. At the warning prompt, click **OK**.

Virtual Documents (1 of 2)

To convert an existing simple document to a virtual document:

1. Select the target object.
2. Select **Tools** > **Virtual Documents** > **Convert to Virtual Document** from the menu.

To add components to a virtual document:

1. Make sure the **Virtual Document Manager** screen is displayed.
2. Select **Tools** > **Virtual Documents** > **Add Child** from the menu.
3. Select the desired source (**From Clipboard**, **From File Selector**, or **Using New Document**) from the sub-menu.

To change the position of a component within the virtual document hierarchy:

1. Drag a **component** in the **Virtual Document Manager** screen and drop the component in its new position.
2. Select **Reposition** from the pop-up menu.

To apply the same version label to all children of a virtual document:

1. Select a virtual document.
2. Select **Tools** > **Virtual Documents** > **Modify Version Labels** from the menu.
3. On the **Modify Version Labels** screen, select an action: **Add a label** or **Remove a label**.
4. Select the target label or enter a new one.
5. If desired, aslect the **Apply to all descendants** check box.
6. Click **OK**.

To bind a specific version of a component to a virtual document:

1. Select a **component** in the **Virtual Document Manager** screen.
2. Select **Tools** > **Virtual Documents** > **Fix to Version** from the menu.
3. On the **Fix to Version** screen, select the desired version option from the **Always Use** drop-down list.
4. Click **OK**.

Virtual Documents (2 of 2)

To create a snapshot:

1. Select a virtual document.
2. Select **Tools** > **Virtual Documents** > **New Snapshot** from the menu.
3. On the **Create snapshot** screen, enter a **Name** for the snapshot.
4. Provide additional property information if desired.
5. Select the **Freeze snapshot** check box to prohibit modifications to the components of the snapshot.
6. Click **Finish**.

Formal Records

To declare one or more objects as a formal record:

1. Select the object you are declaring as a formal record. You can select more than one if you intend to declare multiple objects.
   Note: Selecting another formal record or folder is not permitted.
2. Select **Records > Declare Formal Record** from the menu.
3. Select **Individual records** or **One record** if you are declaring multiple objects; otherwise, proceed to the next step.
4. Click the **Select** link next to **File Plan**.
5. Double-click the desired cabinet/folder to navigate to the desired location and select the desired folder.
6. Click **OK** to accept the selected folder for the File Plan. The **Declare Formal Record** screen is updated, displaying additional fields.
7. Optionally, click the drop-down list for the **Type** to change the default option displayed.
8. Optionally, click the drop-down list for the **Form Template** to change the default option displayed.
9. Optionally, select the **Unlink source documents** check box: if you want the source documents to be automatically moved to an internal RM location.
10. Click **Continue** to accept entries.
11. Optionally, fill in the **Info** form as needed. There are no mandatory fields. You can click the **Insert** button to add fields for the **Authors** and **Keywords** and click the **Delete** button to remove them.
12. Click **Next** to fill in each form if you are declaring multiple objects individually.
13. Click **Finish** to accept the entries and create the formal record.

To undeclare a formal record:

1. Select each formal record that is to be undeclared.
2. Select **Records > Undeclare Formal Records** from the menu.
   Note: A confirmation screen is displayed to confirm the action(s). Any formal record that is under retention cannot be undeclared as a formal record. You must remove the retention policy from a formal record before you can undeclare it as a formal record.
3. Click **OK** to continue with the actions as indicated in the confirmation screen.
   Note: Undeclaring a formal record simply removes the records metadata and record snapshot - it does not actually remove the source document.

Record Relationships and Versioning (1 of 2)

To create a record relationship:

1. Select the desired parent object to be related.
   Note: Although you are able to declare one or multiple objects as a formal record you cannot select more than one to create a record relationship.
2. Select **Records > Create Record Relationship** from the menu.
3. Select one of the options from the drop-down list for the **Relationship**.
   Note: The default values provided as options in the drop-down list are **Reference** and **Supporting**. This feature is used for labeling only; there is no business logic behind these options.
4. Double-click the desired cabinet/folder to navigate to the location of the target child record.
5. Select the desired child target object and click **OK** to create the record relationship.

To view a record relationship

1. Select the desired parent object in the relationship.
2. Select **View > Record Relationships** from the menu.

To remove a record relationship:

1. Select the desired parent object in the relationship.
2. Select **View > Record Relationships** from the menu.
3. Select the desired child object in the relationship.
4. Select **Records > Remove Record Relationship** from the menu.
5. Click **OK** to confirm and continue with the action.

To check out a formal record:

1. Select the formal record you want checked out.
2. Select **File > Check Out** from the menu. If the formal record references the **CURRENT** version of the source document, the checkout process will check out both the formal record object and the source document.
3. If the formal record references an older **non-CURRENT** version of the source document, two options are presented. Select **Only the Formal Record** (to check out metadata only) or **Formal Record and all Contents** (to check out both metadata and content).
4. Click **OK**.

Record Relationships and Versioning (2 of 2)

To check in a formal record:

1. Select the formal record you want checked in.
2. Select **File > Check In** from the menu.
3. You can select to save as minor version or major version. You cannot save as the same version.
4. Optionally, you can type a **Version Label** and a **Description**.
5. Click **OK**.

Physical Records

To make a library request:

1. Right-click the desired object and select **Make Library Request** from the pop-up menu.
2. Enter a unique identifier in the **Name** field.
3. Enter a **date** for pickup or shipment of requested objects.
4. Select a **notification preference**.
5. Select a **shipping option**
6. Optionally enter a **note**.
7. Click **Finish**.

To view library requests:

1. Select **View > My Library Requests** from the menu.

To cancel a library request:

1. Right-click the desired library request and select **Cancel Request** from the pop-up menu.

Keyboard Shortcuts for Windows and Mac Operating Systems

Table A-1. Shortcuts for navigating and selecting in the list view

Action	Microsoft Windows Shortcut	Mac OS Shortcut
Check Out	O	O
Edit	E	E
View	V	V
Check In	I	I
Open a document in read-only mode	Enter	Enter
Subscribe	U	U
Email	M	M
View Properties	P	P
Export	Shift+E	Shift+E
Start Quickflow	Q	Q
Add to clipboard	Shift+C	Shift+A
Copy here	Shift+V	Shift+C
Move here	Shift+M	Shift+M
Link here	Shift+L	Shift+L
Delete	Delete	Delete
Apply Lifecycle	L	L
Promote to next state	R	R
Demote to previous state	D	D
Declare record	Shift+R	Shift+R
Create discussion	Shift+U	Shift+U
Covert to virtual document	Shift+T	Shift+V
Create new document	Shift+N	Shift+N
Import	Shift+I	Shift+I
Help	Shift+H	Shift+H
Advanced search	Shift+S	Shift+S
Logout	Shift+O	Shift+O

Table A-2. Shortcuts for navigating and selecting in the thumbnail view

Action	Microsoft Windows Shortcut	Mac OS Shortcut
Select All	Ctrl+A	Cmd+A
Select multiple	Ctrl+click	
Select consecutive	Shift+click	
Next item	Right arrow	Right arrow
Previous item	Left arrow	Left arrow
Item in row above	Up arrow	
Item in row below	Down arrow	

Table A-3. Shortcuts for navigating and selecting in a table

Action	Microsoft Windows Shortcut	Mac OS Shortcut
Select All	Ctrl+A	Cmd+A
Select multiple	Ctrl+click	
Select consecutive	Shift+click	
Next item in list	Down arrow	Down arrow
Previous item in list	Up arrow	Up arrow

Table A-4. Shortcuts for navigating and performing actions in a form

Action	Microsoft Windows Shortcut	Mac OS Shortcut
Go to the next field or button	Tab	Tab
Go to the previous field or button	Shift+Tab	Shift+Tab
Choose a button action	Enter	Enter