

DOCUMENTUM D2

User Guide



McGill

Information
Technology
Services



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1. D2 Overview

This document will cover the main Documentum D2 functionalities users will need to work with to use this robust document repository and collaboration tool. It will cover the features available to the following roles/groups in spaces: coordinator, contributor, and consumer. The basic D2 features also apply to other D2 special projects, but other features of these special projects are covered in the training sessions dedicated to these projects.

Note

In D2, roles are called groups and will be called groups for the remainder of this document.

1.1 D2 Groups

Support

IT Support staff are the support group. This group processes the request to create the space and the three standard D2 groups: coordinator, contributor and consumer. The Support group can only assign people to the coordinator group; they cannot add any members to the contributor and consumer groups. IT Support then sends an email to the coordinator(s) informing them that the space is created. They then remove themselves for the newly created space.

Who typically has access to this group?

IT Service Desk staff

Coordinator

Once the IT Service Desk creates the space, space coordinators become responsible for managing the newly created space. They can now add individuals or groups to the coordinator, contributor and consumer groups. The coordinator can also update the permissions for the different groups.

Who typically has access to this group?

A supervisor, team lead, project manager, coordinator or other individuals in a coordination or leadership position.

Contributor

The contributor group will be able to access their space, add folders, and import files into the space. By default, the contributor is not able to delete. This group will also be able to view, edit, comment, copy, paste, etc.

Who typically has access to this group?

Team members, staff assigned to a given project, etc.

Consumer

The consumer group will only have read access to content within the space. This group will not be able to perform certain functions such as edit and add keywords. By default, the contributor is able to comment.

Who typically has access to this group?

Other stakeholders: individuals that are meant to see the content but are not required to contribute to it.

2. Introduction to D2

EMC Documentum D2 is a web-based application used to manage content and underlying processes. It is a document repository and collaboration tool. IT Support staff will create spaces (based on user requests) and the different groups within these spaces. Key system features include: versioning, full text search, and the standard document check in/check out feature. D2 allows you to:

- Personalize your space interface using workspaces and widgets
- Perform searches across one or more repositories (e.g. D2, Webtop)
- Create, import, edit, modify, export and delete content
- Use content lifecycle and workflow processes (these will be implemented in a later phase)
- Use the recycling bin and mobile app (these will be implemented in a later phase)

2.1 Access D2

Enter the following URL in your main browser window:

<https://cms.mcgill.ca/D2/#d2>

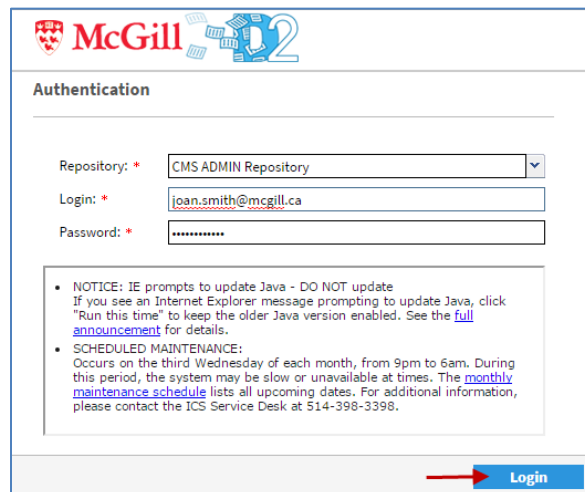
2.2 Recommended browsers

Microsoft Internet Explorer 11. The system is also compatible with modern versions of Google Chrome and Mozilla Firefox. For the complete list, refer to [KB Article 5180](#).

2.3 Login

Enter your McGill username (first.lastname@mcgill.ca or first.lastname@mail.mcgill.ca) and associated password; then click on the **Login** button. Your name and McGill user name display in the menu.

1. Fill in the following:
 - **Repository:** CMS Admin Repository
 - **Login:** enter your McGill username.
 - **Password:** enter your McGill password.
2. Click **Login**



The screenshot shows the McGill D2 Authentication login page. At the top, there is a header with the McGill logo and the D2 logo. Below the header, the word "Authentication" is displayed. The login form contains three fields: "Repository:" with a dropdown menu showing "CMS ADMIN Repository", "Login:" with a text box containing "joan.smith@mcgill.ca", and "Password:" with a text box containing "*****". Below the form, there is a box with two notices: "NOTICE: IE prompts to update Java - DO NOT update" and "SCHEDULED MAINTENANCE: Occurs on the third Wednesday of each month, from 9pm to 6am. During this period, the system may be slow or unavailable at times. The monthly maintenance schedule lists all upcoming dates. For additional information, please contact the ICS Service Desk at 514-398-3398." At the bottom right of the form, there is a blue "Login" button with a red arrow pointing to it.

2.3.1 First-time login

When you log in to D2 for the first time, you will be prompted to install the **Content Transfer Extension**, which allows faster check-out and check-in of files using D2. The required steps for the CTF installation differ depend on

whether you have a **SLA** (Service Level Agreement with IT Services) and your administrative rights to the computer. The detailed steps for each type of installation are provided in [Appendix 1](#).

- a. CTF installation on personal or non-SLA computers
- b. CTF installation on computers covered under SLA agreement where the plugin is pushed by IT Services
- c. CTF installation on computers covered under SLA agreement where the plugin is pushed by IT Services and the user does not have administrative rights to the computer

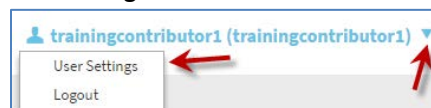
2.4 Installing the Content Transfer Extension

There are three Content Transfer Modes in D2:

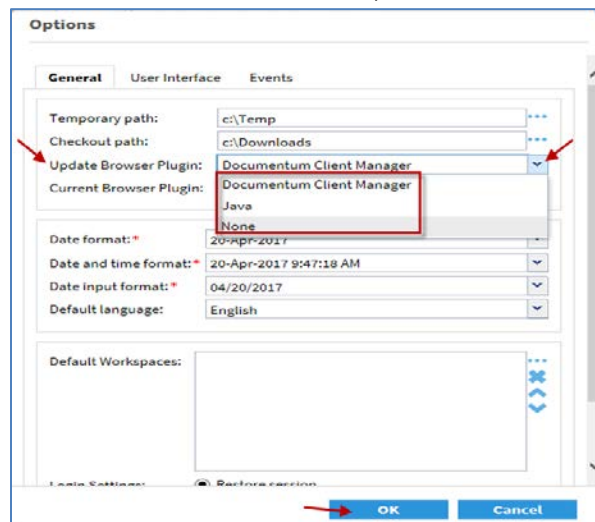
- Documentum Client Manager (Content Transfer Extension) - *recommended mode*
- Java
- None (Thin Client)

To switch between the different modes:

1. Click on the down arrow next to your name.
2. Click on **User Settings**.



3. The **Options** window displays. From the **General** tab, select the appropriate option from the drop-down menu in the **Update Browser Plugin** field.
4. Once you select or enter the desired mode, click **OK** to save the changes.

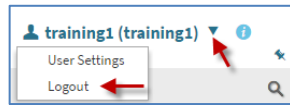


For more information regarding the differences between the three Content Transfer Modes in D2, and how they affect the following tasks in D2, refer to [Appendix 2](#):

- check-out and check-in when editing a file
- export folder
- native annotations
- import folder
- drag files from the computer to D2
- drag files from D2 to your computer
- drag files from MS Outlook to D2
- comparing 2 MS Word documents

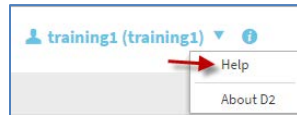
2.5 Logout

1. From the main menu, click the down arrow next to your name.
2. Click **Logout**



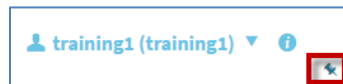
2.6 Access D2 User Guide

1. Click on **i** next to your name.
2. Click on **Help**



2.7 Pin/Unpin

Note that it is possible to pin and unpin this section of the screen (i.e. menu, username) by clicking on the pin icon. To restore this section of the screen, hover with your mouse just below the url and click the pin again.



2.8 Subscriptions in D2

In D2, the subscription mechanism that exist are:

- Daily Digest of New Item and New Version
- Instant Notification on New Item
- Instant Notification on Modified Item

For details on:

- How to set up your subscription preferences in D2 for spaces, refer to [Subscribe to space](#) section.
- How to set up your subscription preferences in D2 for folders, refer to [Subscribe to folder](#) section.
- How to set up your subscription preferences in D2 for files, refer to [Subscribe to file](#) section.

2.9 Migration from CenterStage to D2

2.9.1 Subscription migration

File subscriptions will be functioning in D2 immediately once migrated from CenterStage. Folder and Space subscriptions, even though they will be migrated, **will not** function in D2. These subscriptions will be available in a future release of D2. We will keep you updated on these developments.

During migration, subscriptions will be moved from CenterStage to D2 as follows:

- a. For users who subscribed to spaces and folders in CenterStage
- During migration, subscriptions to spaces and folders will be moved from CenterStage to D2 as follows, depending on the file subscriptions you were using in CenterStage:

CenterStage subscription preferences	Documentum D2 subscription preferences
As soon as updated	Instant Notification on New Item
Daily	Daily Digest of New Item and New Version
Weekly	Daily Digest of New Item and New Version

- b. For users who subscribed to files in CenterStage
- During migration, subscriptions to files will be moved from CenterStage to D2 as follows, depending on the space and folder subscriptions you were using in CenterStage:

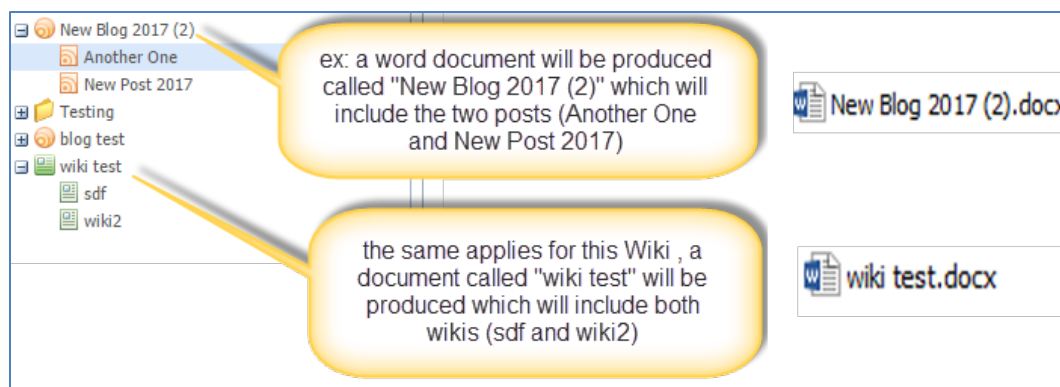
CenterStage subscription preferences	Documentum D2 subscription preferences
As soon as updated	Instant Notification on Modified Item
Daily	Daily Digest of New Item and New Version
Weekly	Daily Digest of New Item and New Version

2.9.2 Blogs and Wikis migration

Despite blogs and wikis not being available in D2, their content will be extracted and migrated from CenterStage into D2 in the form of Word documents. This way you can continue to access your blog and wiki content.

Once you are using D2, you can use **Blogs.mcgill.ca** as a virtual space for individuals or groups to publish, discuss or link to content, and share it privately or with the global online community. For more information, refer to [KB Article 1813](#).

Once your blog content has been migrated from CenterStage to D2, a Word document for each blog or wiki will be available as shown here:



Please note:

- The Word documents produced for blogs and wikis will reside in the same location in D2 as in CenterStage.
- The same owner name will be maintained.
- The same permissions will be kept.
- Only blogs created in 2015, 2016 and 2017 will be transformed into Word documents and migrated into D2.

2.9.3 Data Table migration

While existing files and documents will be automatically and securely transitioned from CenterStage to D2, data tables will not be available in D2.

If you wish to save your data table content and have it migrated to D2, your data table must first be exported and saved in Excel, and then re-uploaded to CenterStage. For more information on how to do this, follow the step-by-step instructions in [KB Article 7508](#). Ensure the data table content is saved prior to migration to D2. Refrain from creating any new data tables in either existing or new CenterStage spaces. If you have any questions or require any assistance with the process of exporting your data table content, contact ecmcommunication.ccs@mcgill.ca.

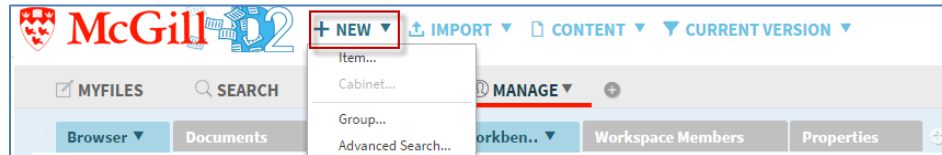
2.10 Main Menu

The main menu is at the top by default. You can change its location by using the [User profile and preferences](#).



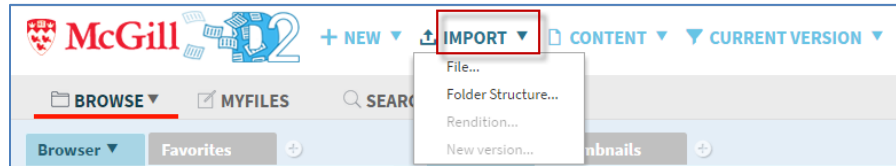
2.10.1 NEW

This will be used to create a folder. This is explained in [Create a folder](#).



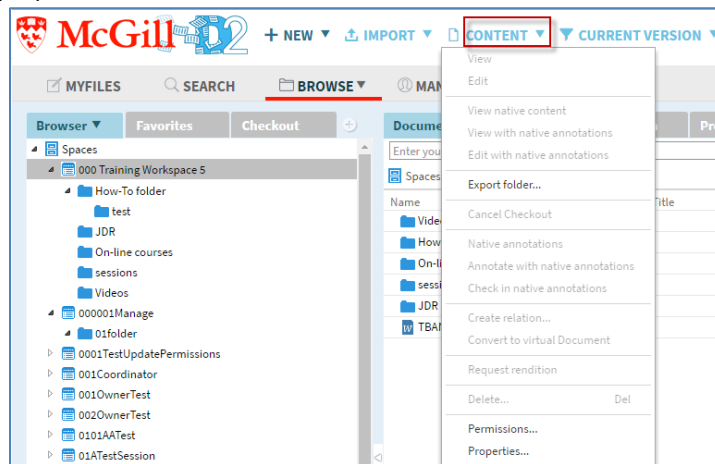
2.10.2 IMPORT

This will be used to import one or several files. If the EMC Documentum Client Manager plug-in is enabled, it can also be used to import entire folder structures (including folders, sub-folders and files).



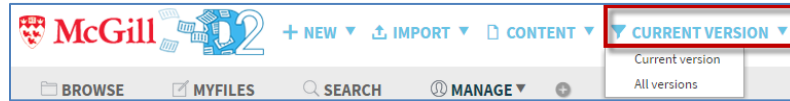
2.10.3 CONTENT

If the EMC Documentum Client Manager plug-in is enabled, this will be used to export folders, view and/or modify permissions and properties.



2.10.4 VERSIONS

This will be used to toggle between current versions and all versions.




2.11 Workspaces

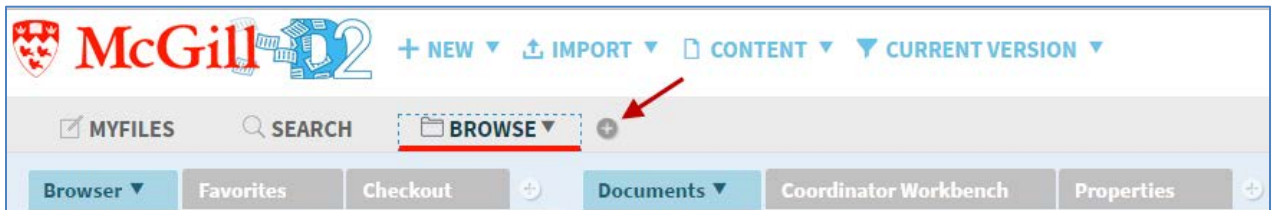
D2 includes workspaces that you can use in your space. When you first connect to D2, you will see the three default workspaces: **BROWSE**, **MYFILES**, **SEARCH**. The workspaces you will see depend on your group. For example, the space coordinator group will be able to see the **MANAGE** workspace. These workspaces contain widgets that you can use to personalize your functionality. Widgets are explained in the next section.

Note

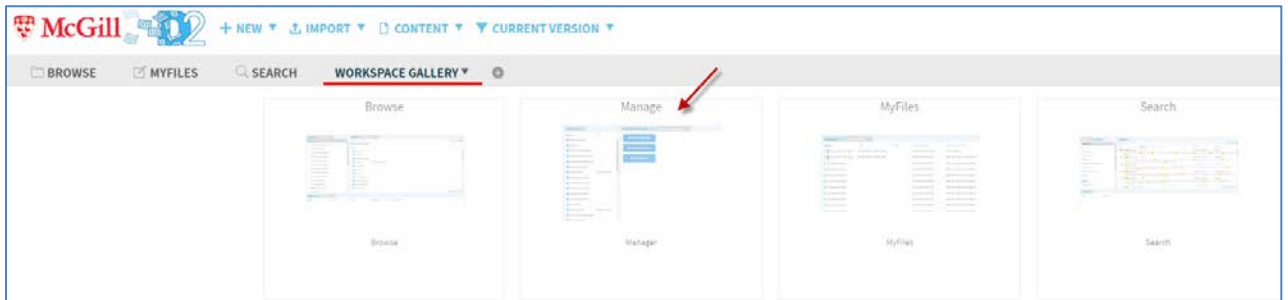
You can have the same workspace open more than once. For example, you may want to work with two different spaces, each space in a **Browser** workspace.

To add a workspace:

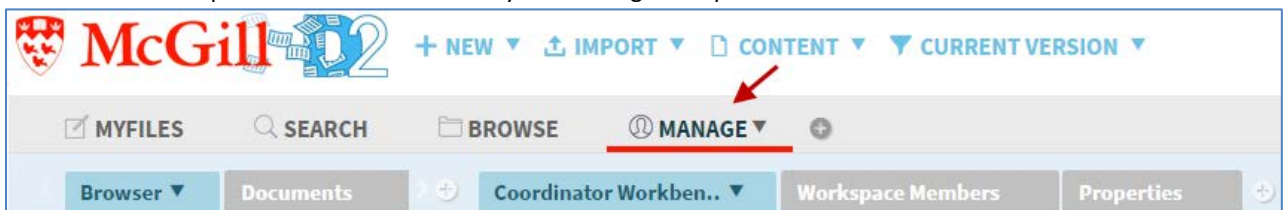
1. Click on the add workspace button  to access the **Workspace Gallery**.



2. Select the workspace(s) that you want to use, according to your needs, by clicking on it (e.g. Manage).

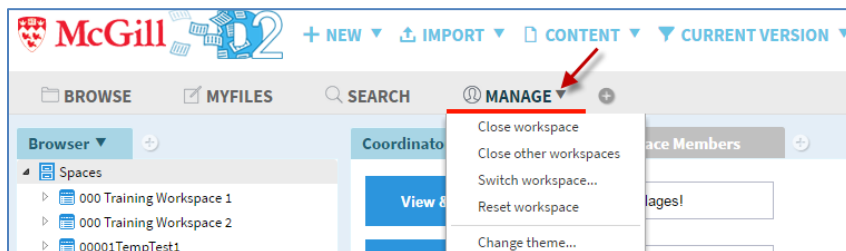


3. The selected workspace will then be added to your existing workspaces.




To close the workspace, close other workspaces, switch workspace or reset workspace:

1. Click on the down arrow next to a workspace.
2. Select the desired action.



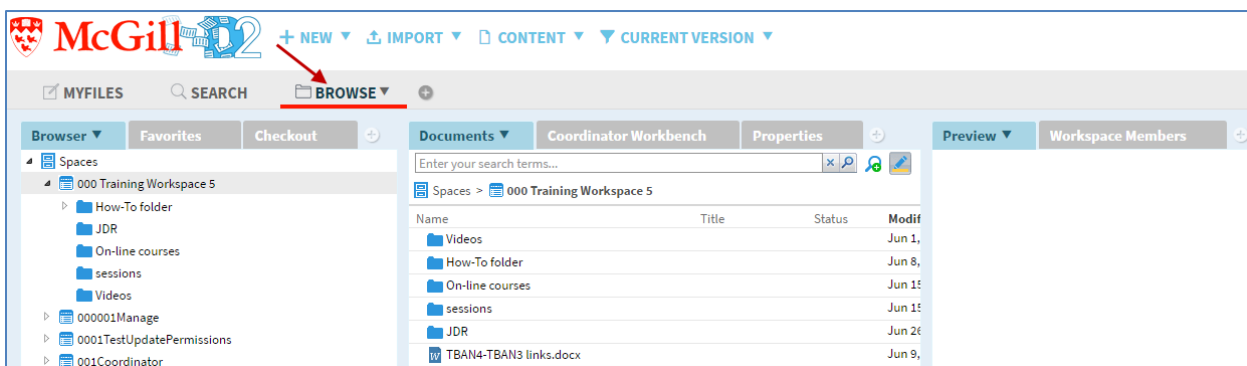
To delete a workspace:

1. Click on the  icon next to the workspace.



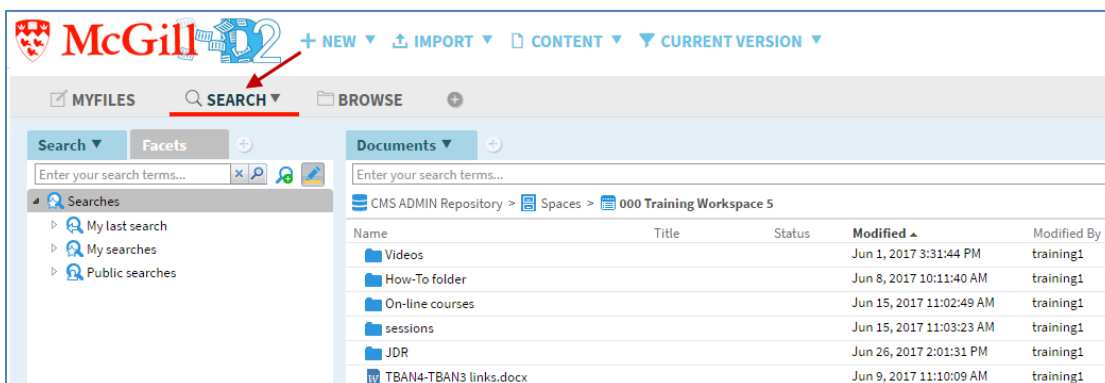
2.11.1 Browse Workspace

This workspace allows you to navigate to your spaces, folders, sub-folders and documents. It allows you to have some advanced features (*note that features are available according to your group*). You will see several widgets, such as: **Browser**, **Documents**, **Coordinator Workbench**, **Preview** and **Workspace Members**. Some widgets are there by default, but you may also add/remove widgets. Widgets are explained in detail in the next section.



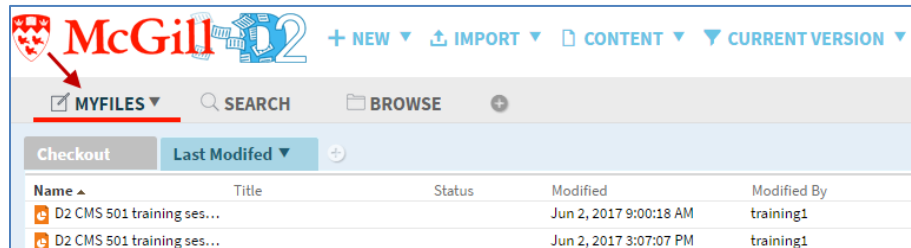
2.11.2 Search Workspace

This workspace allows you to search for objects, documents, etc. This is explained in more detail in the [Search](#) section.



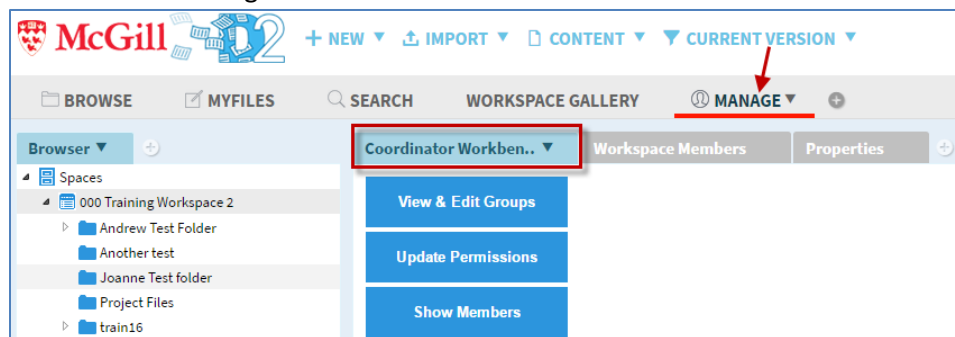
2.11.3 MyFiles Workspace

This workspace allows you to see information about your files (e.g. those that are checked out, last modified, etc.).

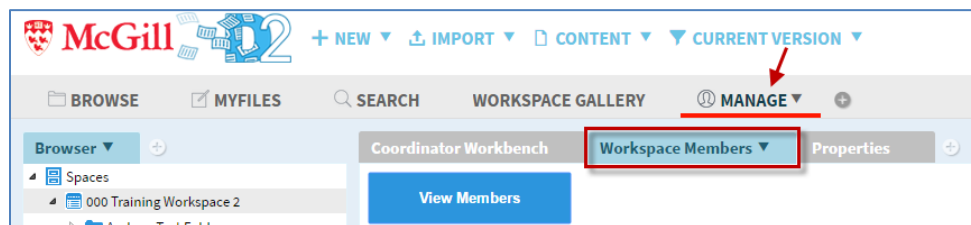


2.11.4 Manage Workspace

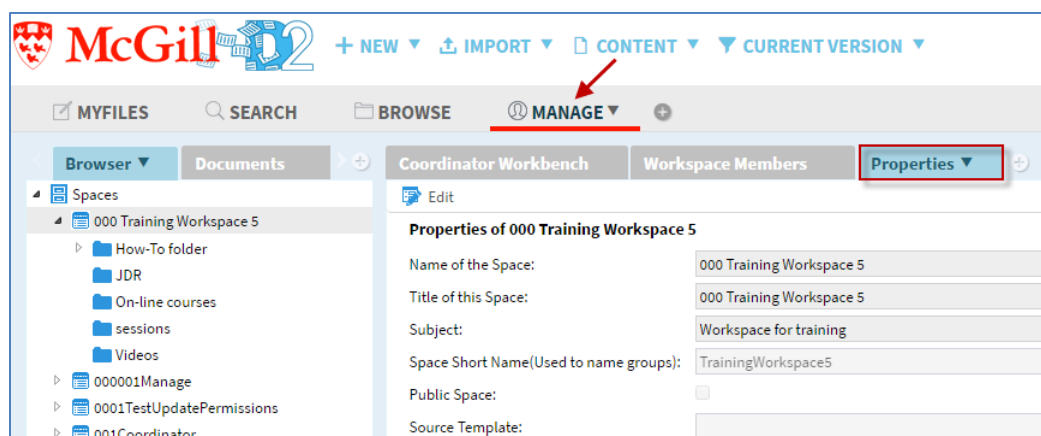
This workspace is only available to coordinators. Start by selecting a space. The **Coordinator Workbench** widget allows you to view and edit your groups, update permissions, and show members for the selected space. See the next section for more details on widgets.



Use the **Workspace Members** widget and click **View Members** to see the members of the group and their permissions.



The **Properties** widget allows you to view/update the Name of the Space, Title of this Space, Subject, and Space Short Name.



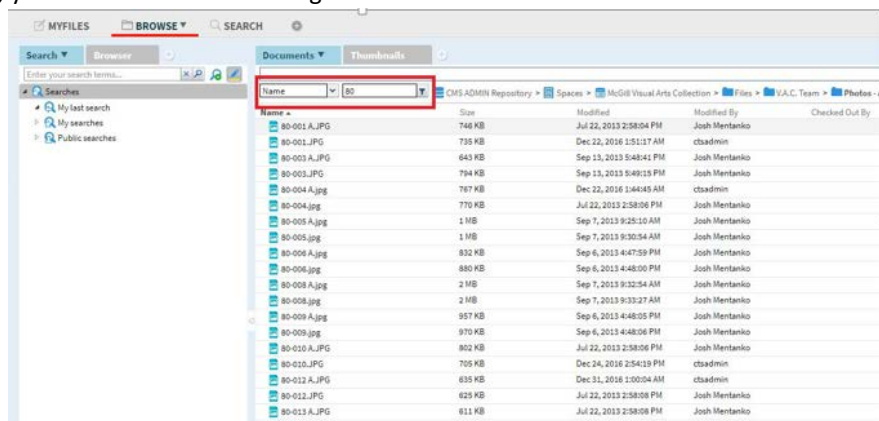
2.12 Widgets

Workspaces contain widgets that are there by default; you can also add other widgets. A widget is a graphical user interface (GUI) element that you can use to personalize your workspace. You can click on the down-arrow next to a widget and select **Columns...** to modify its fields. The table below lists some widgets you can use:

Widget	Function
Audit	Displays a list of audited actions for the selected content
Browser	Displays spaces and folders.
Checkout	Displays a list of checked-out content files with user name, checkout date/time information.
Comments	View, create, delete and reply to comments about the content
Coordinator Workbench	Restricted to the coordinator group and is used to view and edit groups, update permissions and display members.
Documents	Displays content. Also displays results from searches.
Favorites	Displays a list of content items (spaces, folders, files) marked as favorite.
Facets	Linked to search results template (e.g. modified by, modified date)
Last Modified	Displays when the content was last modified
Location	Displays a list of directory locations where the content is found
Preview	Use to preview pdf documents
Properties	Displays properties of the selected content
Relation	Displays related objects (e.g. comments and track changes in Word)
Search	View, edit and run past and saved searches
Thumbnails	Enables thumbnail preview for browsing content. Displays the first page of a document.
Versions	Displays a list of the versions of the selected content
Workspace Members	Displays current permissions for the content

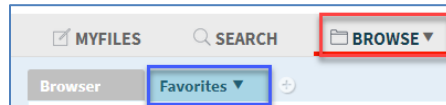
2.12.1 Documents widget

The **Documents** widget displays content, such as folders and files. It also displays results from searches. When a folder has more than 1000 files, the first 1000 files will be listed and a filter automatically displays. For the rest of the files, you will have to search using this filter.




2.12.2 Favorites widget

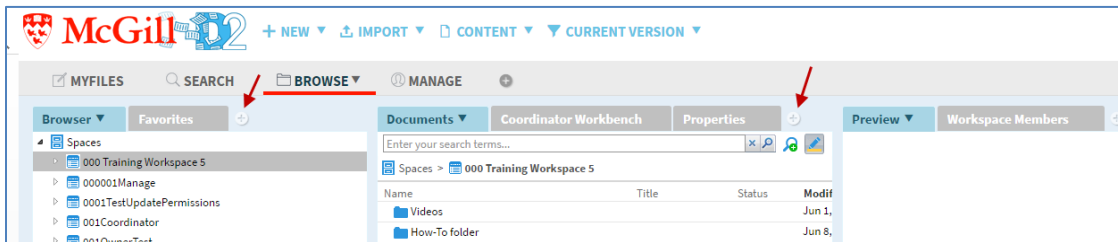
This widget is available as of January 18, 2018. D2 users who log in for the first time after this date, will see the **Favorites** widget by default. D2 users who logged into D2 for the first time before this date, will have to add this widget. It is recommended to add the **Favorites** widget next to the **Browser** widget in the **BROWSE** workspace.



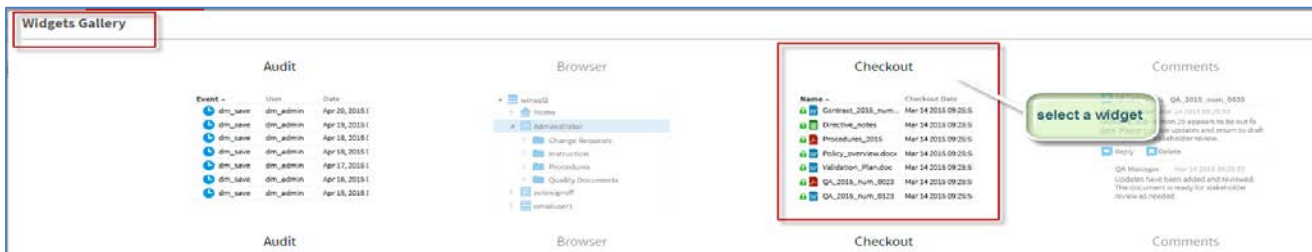
2.12.3 Add a widget

To add a widget to a workspace, follow the steps below:

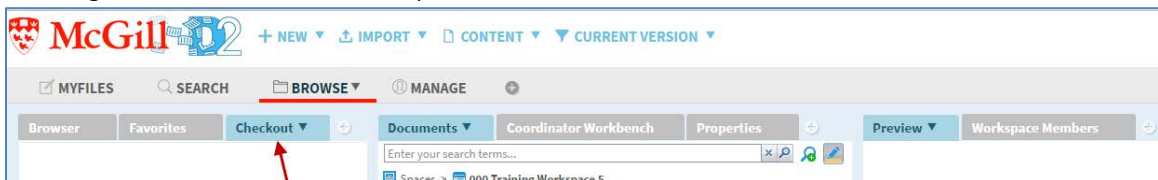
1. From a workspace, click  to add widgets from the Widgets Gallery.



2. The **Widgets Gallery** displays. Click on the available (highlighted) widget(s) that you want to add.




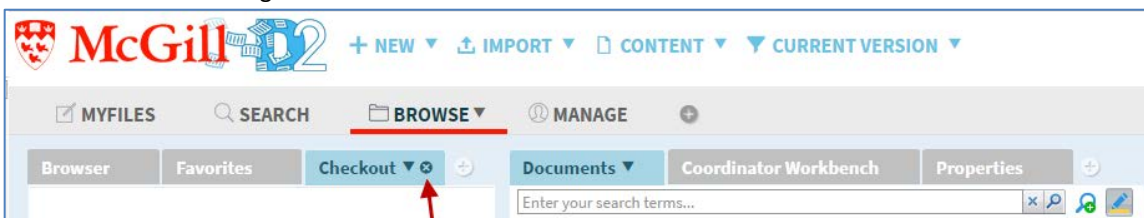
3. The widget will be added to the workspace.



2.12.4 Remove a widget

To remove a widget, follow the steps below:

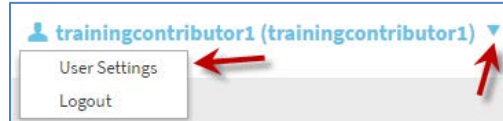
1. Click  next to the widget to remove it.



3. User profile and preferences

This can be used by all the groups and is used to change your Documentum D2 settings. You can make changes to the date and time format, row height, menu position/size setting, subscription events, etc.

1. Click on the down arrow next to your name.



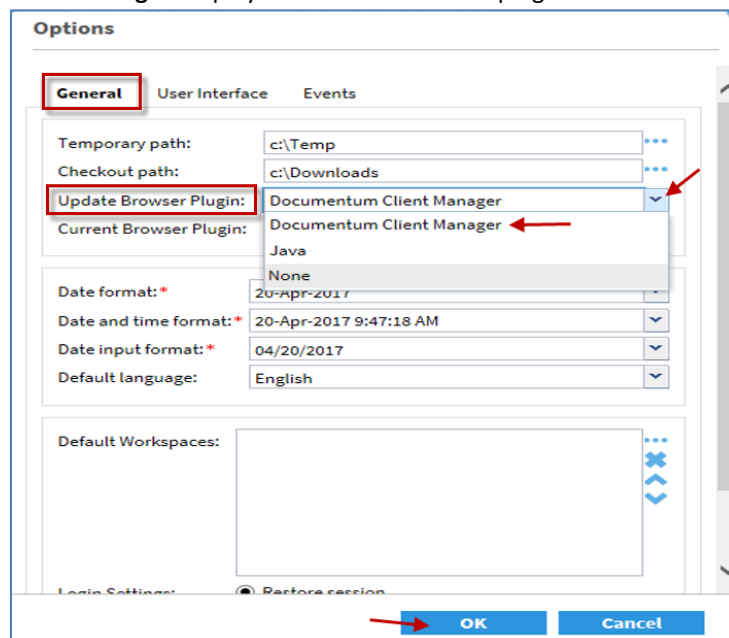
2. Click on **User Settings**.
3. The **Options** window displays. The three tabs (General, User Interface, Events) and the fields within the tabs are explained below. Once you select or enter the options, click **OK** to save the changes.

3.1 General tab

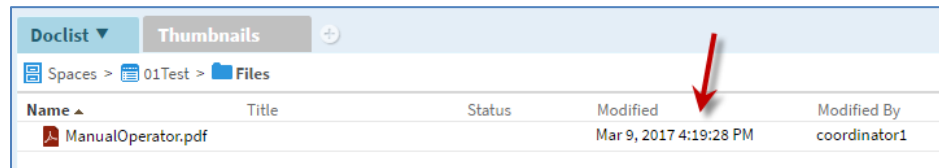
This tab displays and allows you to update the temporary path, checkout path, browser plugins, and date and time formats. It also allows you to select whether you want to save your last session settings. Once you make a change to any of the fields, click **OK** to save them.

The following fields are used to update the temporary path, checkout path and browser plugins.

- a. **Temporary path**: the directory in which your temporary files are saved. The system deletes these files the next time you log in to the system.
- b. **Checkout path**: the directory in which checked out files are saved.
- c. **Update Browser Plugin**: click the down arrow to update the browser plugin. There are 3 Content Transfer Modes in D2: **Documentum Client Manager**, **Java**, and **None** (Thin Client). For more information on installing the Content Transfer Modes, refer to [Appendix 2](#). *We recommend that you select the Documentum Client Manager plug-in.*
- d. **Current Browser Plugin**: displays the current browser plugin used.

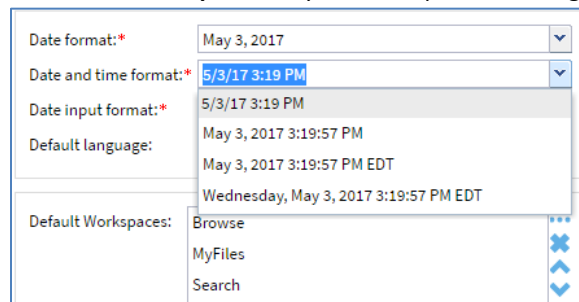


Some widgets display your files and folders with information about your content. For example, you may be using a widget that displays your files with a modified column showing the date of the last change. If you want to change the date format, you will have to modify the date and/or time format fields.



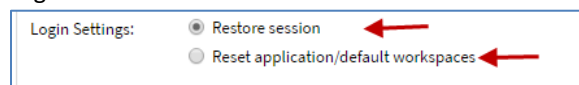
Name	Title	Status	Modified	Modified By
ManualOperator.pdf			Mar 9, 2017 4:19:28 PM	coordinator1

- Date format:** click the down arrow to select the desired date format.
- Date and time format:** click the down arrow to select the desired date and time format.
- Date input format:** click the down arrow to select the desired format for inputting the date.
- Default Workspaces:** use to select the workspaces you want to see when you login, if you select '**Reset application/default workspaces**' as your workspace and widget settings (described below).



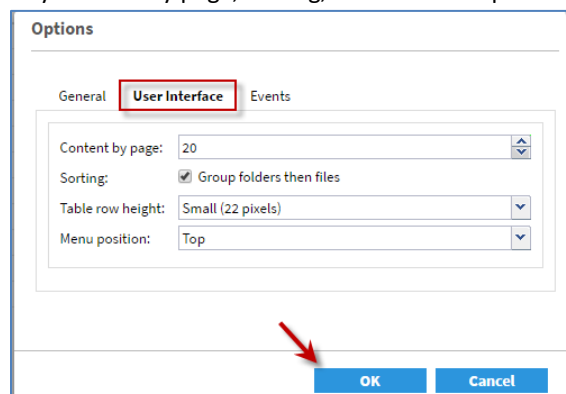
Scroll down to see the following two fields. Select one to set your workspace and widget settings.

- Restore session:** select this option to restore the current session the next time you log in. (e.g. use to restore your workspaces and widget settings). This is the recommended setting.
- Reset application/default workspaces:** select this option to revert to the default session settings the next time you log in.



3.2 User Interface tab

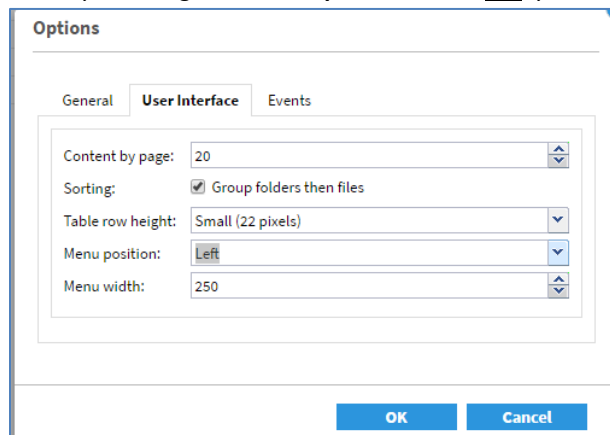
Use the tab to modify content by page, sorting, and the menu position and width. Click **OK** to save the changes.



- a. **Content by page:** Use the up or down arrow next to the field to select the number of items you want to show in each page of a list. The minimum is 20 and the maximum is 250.
- b. **Sorting:** click the **Group folders then files** checkbox to sort and group folders first, followed by files.
- c. **Table row height:** click the down arrow to set the height of a row in a list to small or large.
- d. **Menu position:** the first time you log in, the menu will be at the top of the screen. You can change it to position the menu at the left of the screen.



- e. **Menu width:** if you change the **Menu position** to the left, you can update the menu width here.



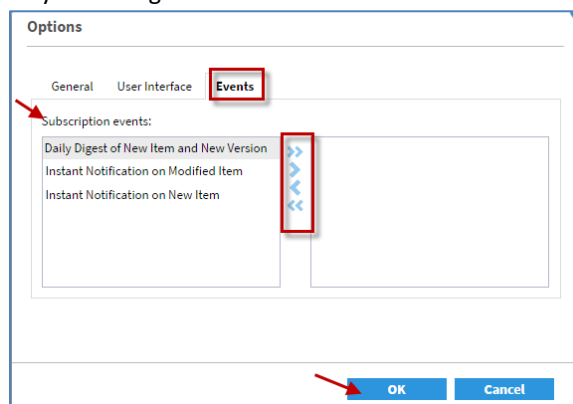
3.3 Events tab

Currently, only file subscriptions are working. Space and folder subscriptions are currently not available. However, they will be available in a future release of D2.

Using the subscriptions from the **Events** tab is a global subscription. This means that you will be notified of any changes in spaces that you are a member of, as well as any changes to public spaces. We do not recommend using this subscription. However, if you decide to use it, we recommend that you only subscribe to the daily digest. Selecting instant notification as your subscription preferences (b and c below) may result in you receiving a great number of emails.

This tab allows you to be notified when a new item or a new version of an item has been added to your spaces and public spaces.

1. From the **Subscription events** window, select and click the right arrow ➤ to select your subscription preference for the space and move it to the window on the right.
 - a. **Daily Digest of New Item and New Version:** a daily report with all notifications for new or updated files or folders that you have subscribed to will be emailed to you.
 - b. **Instant Notification on Modified Item:** you will receive an email when a file or folder that you have subscribed to is updated. You will get one email per document.
 - c. **Instant Notification on New Item:** you will receive an email when a new file is created in a folder you have subscribed to. You will get one email per document.
2. Click **OK** to save your changes.



4. Manage Content

The following sections will describe all the different operations you can perform for spaces. For a description of other D2 special projects (e.g. legal services), please refer to the training material specific to this project.

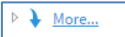
4.1 Spaces

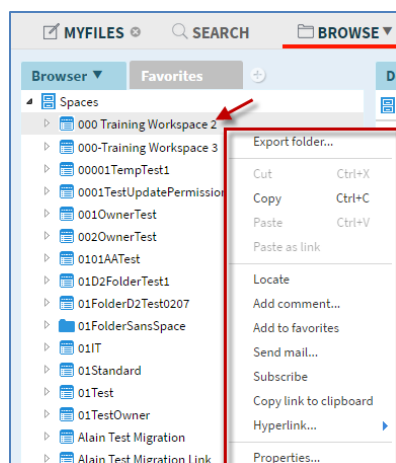
The sections below describe the different operations you can perform for spaces. Some operations are restricted to certain groups (e.g. coordinators).

4.1.1 Create a space

If you want a space created, request a space via our online form (<http://www.mcgill.ca/it/forms/request-cms>)


4.1.2 View spaces you have access to

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget to see the spaces that you have access to.
3. Click  to see more spaces.
4. Select a space. The **Documents** widget displays the content of the space – folders, documents.
5. Right-click on the space to see the following options. These are explained in the sections below.

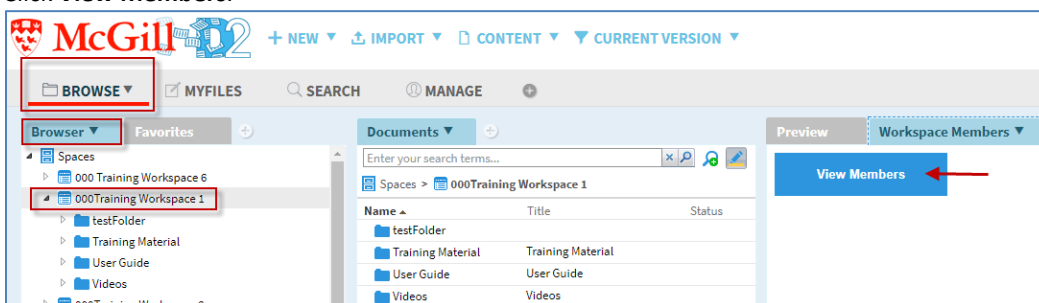


4.1.3 View space members

This is available for any group (coordinator, contributor, consumer) and is used to view the users within each group.

It is available in the **Browser** workspace by default. You may have to use the arrow  to view the right-most pane (**Preview** and **Workspace Members** widgets).

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click the space.
4. Click **Workspace Members** widget.
5. Click **View Members**.



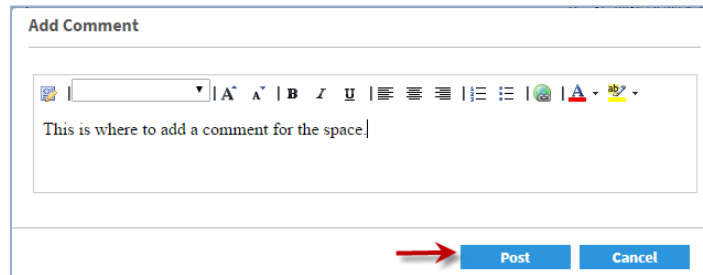
6. The **Current permissions** window display the groups and the members.
7. Click **Close**.


Member	Group	Permission
training12	trainingworkspace1_coordinators	Edit
training14	trainingworkspace1_coordinators	Edit
training9	trainingworkspace1_coordinators	Edit
training10	trainingworkspace1_coordinators	Edit
training8	trainingworkspace1_coordinators	Edit
training7	trainingworkspace1_coordinators	Edit
training6	trainingworkspace1_coordinators	Edit
training11	trainingworkspace1_coordinators	Edit
trainingcoordinator1	trainingworkspace1_coordinators	Edit
trainingcontributor1	trainingworkspace1_contributors	Edit
trainingcontributor2	trainingworkspace1_contributors	Edit
Gisele Dubeau	trainingworkspace1_contributors	Edit
trainingconsumer2	trainingworkspace1_consumers	Read & Comment
trainingconsumer1	trainingworkspace1_consumers	Read & Comment

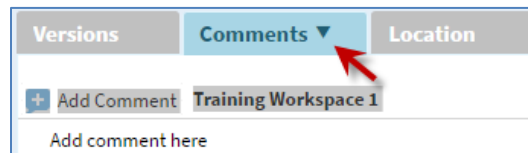
4.1.4 Add comment to space

Use to add comments to your space.



1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right click on space name.
4. Click **Add comment...**
5. The **Add Comment** window displays. Type the comment.
6. Click **Post**.

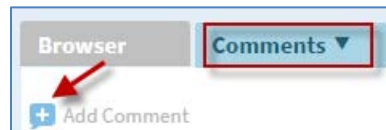


7. These are viewable in the **Comments** widget. (Note: to add **Comments** widget, click on  to select it from the *Widgets Gallery*).

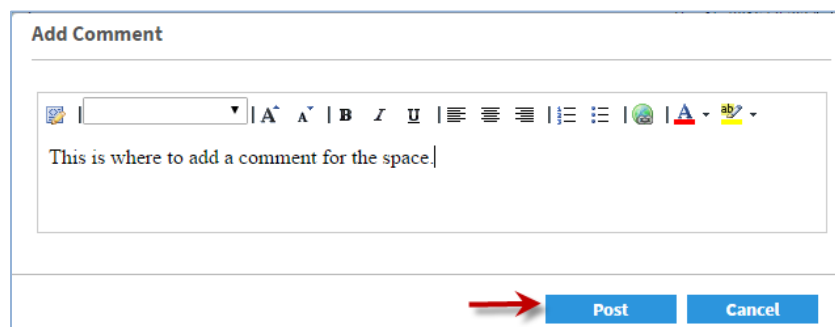


An alternate way to add comments is to use the **Comments** tab:

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click the space name.
4. Click the **Comments** widget. (Note: to add **Comments** widget, click on  to select it from the *Widgets Gallery*).
5. Click the  icon next to Add Comment.




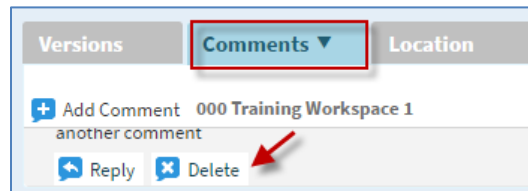
6. The **Add Comment** window displays. Type the comment.
7. Click **Post**.



4.1.5 Remove the comment from the space

Use to remove comments from the space.

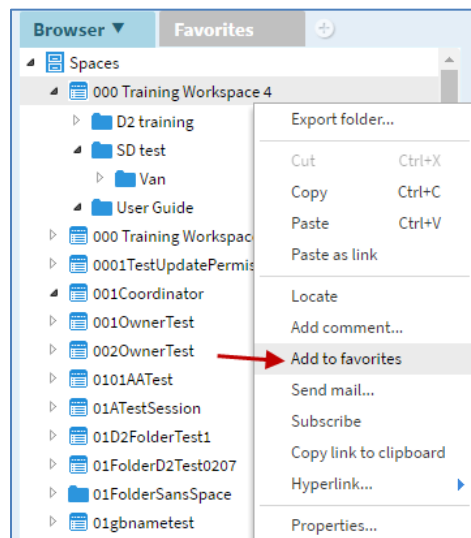
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click the space name.
4. Click the **Comments** widget. (Note: to add **Comments** widget, click on  to select it from the Widgets Gallery).
5. Select the comment you want to delete. You will see two options: **Reply** and **Delete**.
6. Click the **Delete** option.




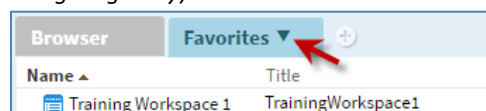
4.1.6 Add space to favorites

Use to add a space to your Favorites widget.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on space name.
4. Click **Add to favorites**



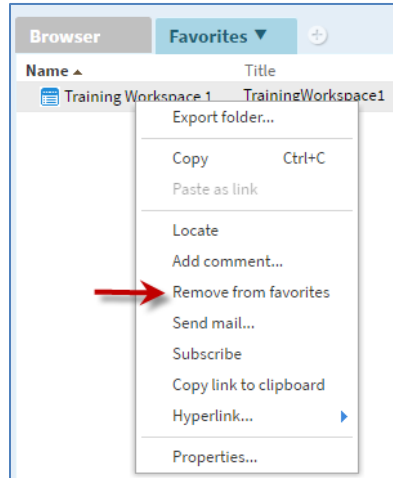
5. The space now appears in the **Favorites** widget. (Note: to add the **Favorites** widget, click  to select it from the Widgets gallery).



4.1.7 Remove the space from favorites

Use to remove a space from your favorites widget.

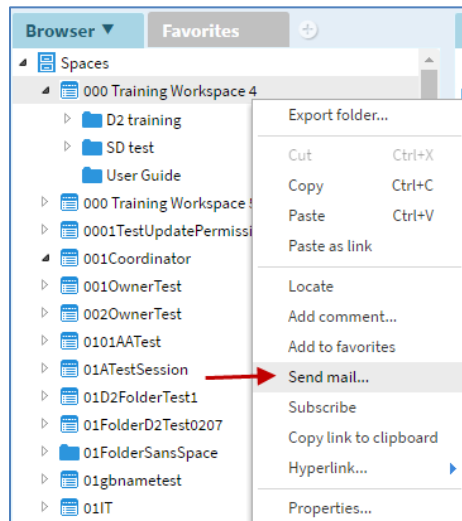
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. From the **Favorites** widget, right-click on the space name.
4. Click **Remove from favorites**.



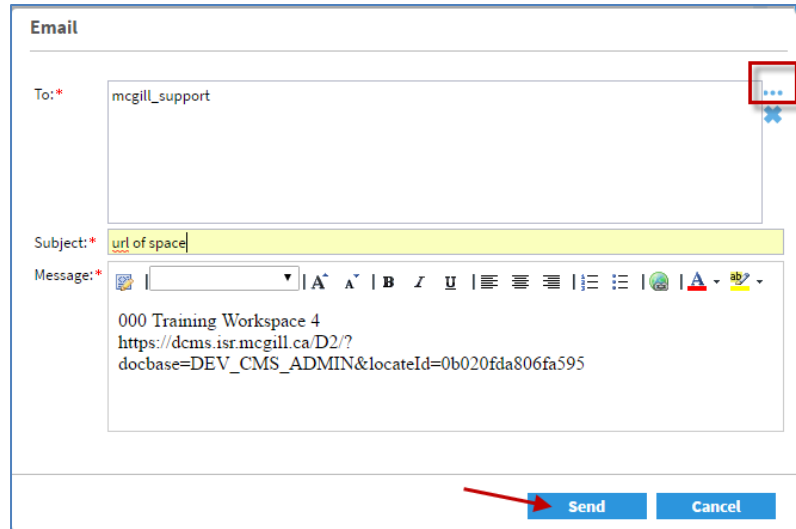
4.1.8 Send mail (space)

Sends an email to the select user(s) with the space url. However, the user has to be a member of the space to be able to open the link.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the space name.
4. Click **Send mail...**



5. The **Email** window displays. Select the recipient(s) of the email by clicking on the *** icon
6. Enter the **Subject**.
7. Type a message in the **Message** area. This area also includes the url of the space.
8. Click **Send**.

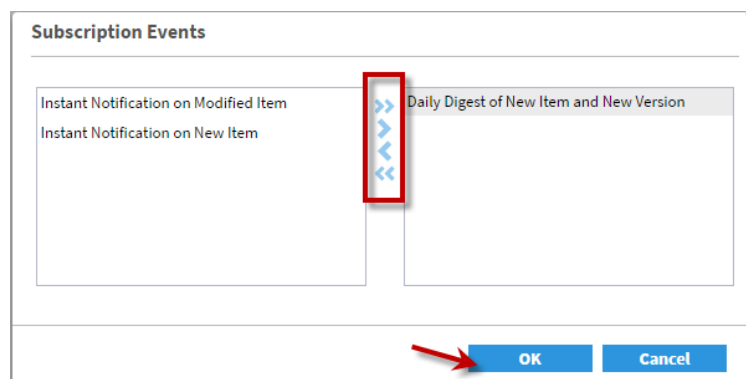


4.1.9 Subscribe to space

Currently, space and folder subscriptions is not available. However, it will be available in a future release of D2. At that time, we recommend that you only subscribe to the daily digest; selecting instant notification as your subscription preferences (b and c below) may result in you receiving a great number of emails.

This allows you to be notified when a new item or a new version of an item has been added to the space.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the space name.
4. Click **Subscribe**
5. Select how you want to be notified. Click the right arrow > to select your subscription preference.
 - a. **Daily Digest of New Item and New Version:** a daily report with all notifications for new or updated files or folders that you have subscribed to will be emailed to you.
 - b. **Instant Notification on Modified Item:** you will receive an email when a file or folder that you have subscribed to is updated. You will get one email per document.
 - c. **Instant Notification on New Item** you will receive an email when a new file is created in a folder you have subscribed to. You will get one email per document.
6. Click **OK**.



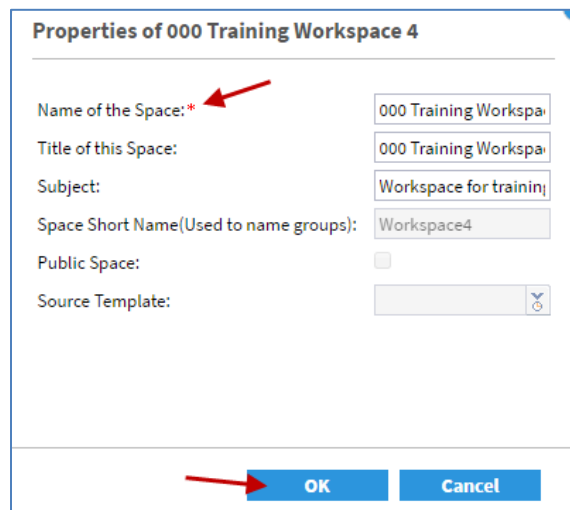
4.1.10 Delete a space

This can only be performed by IT Support. Contact [IT Service Desk](#) to have the space deleted.

4.1.11 Rename the space

This can only be performed by the [IT Support](#) and the coordinator group.

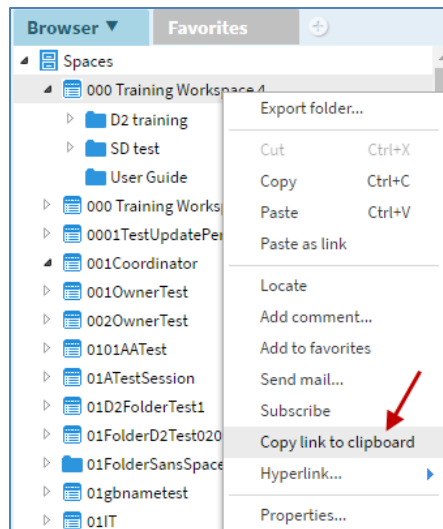
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the space name.
4. Click **Properties** to view/update:
 - a. **Name of the Space:** view/update the name of the space.
 - b. **Title of this Space:** view/update the title of the space.
 - c. **Subject:** view/update comment about what the space is used for.
 - d. **Space Short Name(Used to name groups):** this is the unique name and does contain any spaces; this field cannot be updated.
 - e. **Public Space:** this checkbox is selected if the space is a public space. This is set by IT Support when they create the space. This field cannot be updated here.
 - f. **Source Template:** displays the template used to create the space. This field cannot be updated.
5. Click **OK** if changes are made to the Name of the Space, Title of this Space and Subject.



The screenshot shows a dialog box titled "Properties of 000 Training Workspace 4". It contains several input fields: "Name of the Space: *" (with a red arrow pointing to it), "Title of this Space:", "Subject:", "Space Short Name(Used to name groups):", "Public Space:" (with an unchecked checkbox), and "Source Template:". At the bottom, there are "OK" and "Cancel" buttons, with a red arrow pointing to the "OK" button.

4.1.12 Copy space link to clipboard

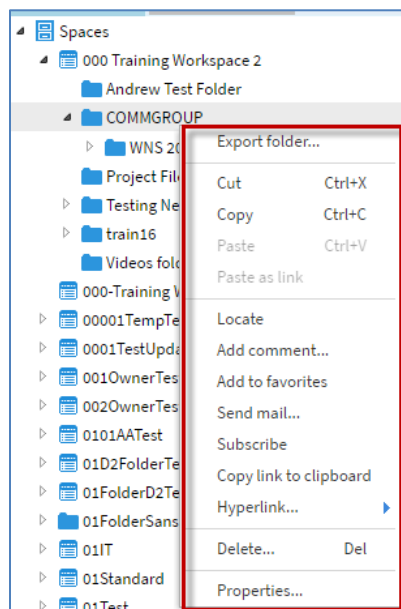
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the space name.
4. Click **Copy link to clipboard**.



5. You can use this link from the clipboard (e.g. in a Word document). Use “**Ctrl + V**” or right-click and paste where do you want to put the link.

4.2 Folders

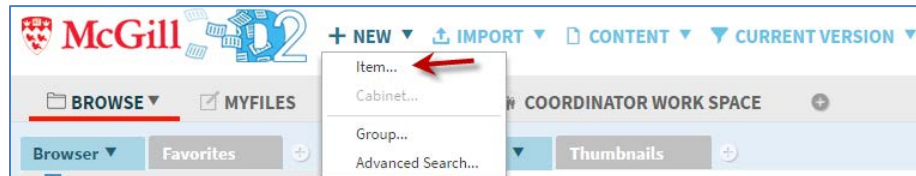
The following sections will describe the different operations you can perform for folders. When you locate the space and the desired folder, right click on the folder and you will see the following options. Note that some options will only be possible with certain browser plugins. For more information regarding the three Content Transfer Modes in D2, and how they affect the following tasks in D2, refer to [Appendix 2](#).



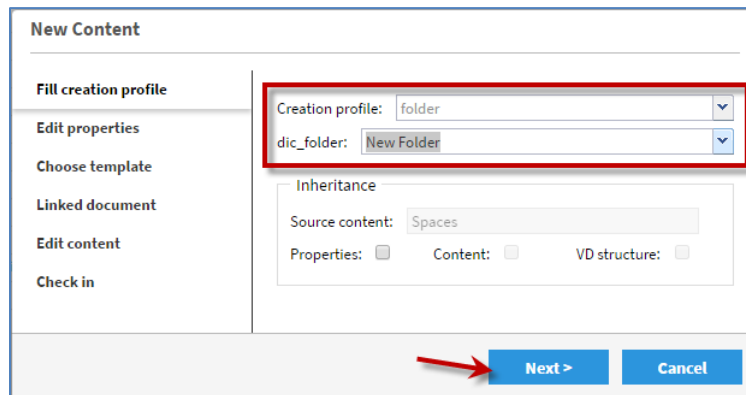
4.2.1 Create a folder

From the menu panel, you can create new folders in your space(s) or within a folder (i.e. subfolders). When using a space, you will be restricted to adding files into folders only.

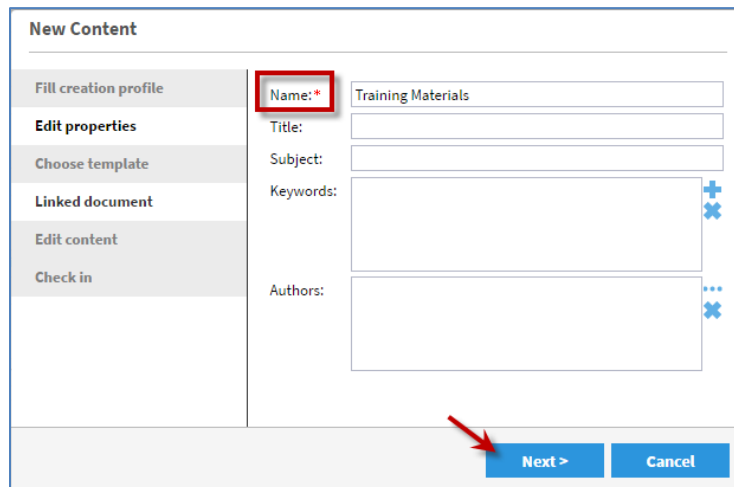
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click the desired space, or the desired folder within a space, in which you want to create a new folder.
4. From the menu, click **NEW > Item**



5. The **New Content** dialog window opens. From the **Creation profile** drop down box, click **folder**.
6. From the **dic_folder** drop down field, click **New Folder**.
7. Click **Next**.



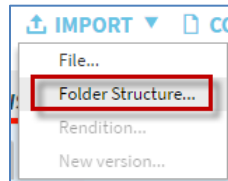
8. From **Edit properties** window, enter the folder name in the **Name** field. This is the only required field; the others are optional.
9. Click **Next**. The folder will be created.




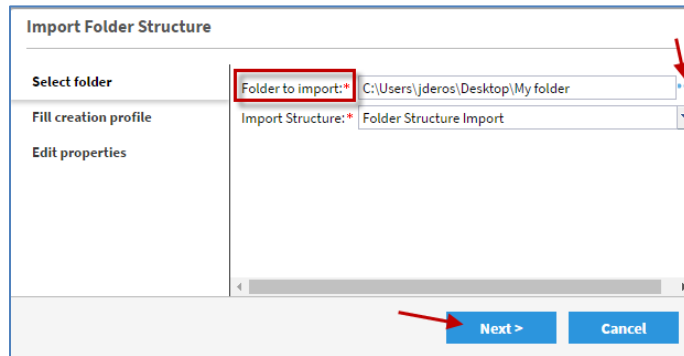
4.2.2 Import folder

Use to import a folder to D2 from another destination. Note that the Content Transfer Mode must be set to **Documentum Client Manager** in order to do this. See [Appendix 2](#) for more information.

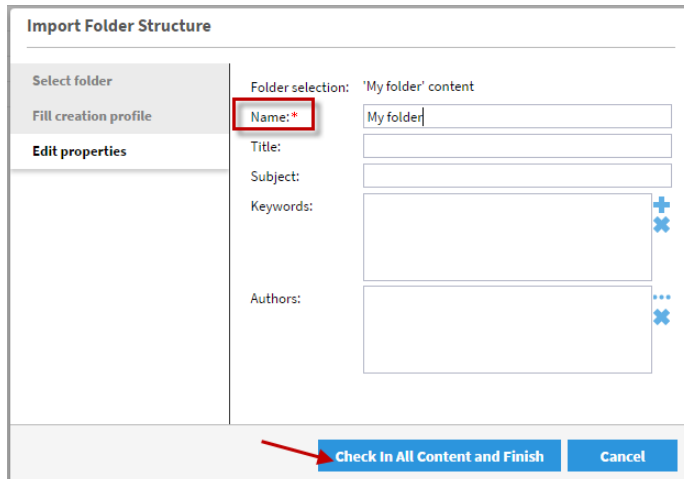
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Select the space to import the folder to.
4. From D2 menu, click **IMPORT > Folder Structure**



5. The **Import Folder Structure** dialogue window opens. From **Select folder** window, click  from the **Folder to import** field to select the folder to import.
6. Click **Next**



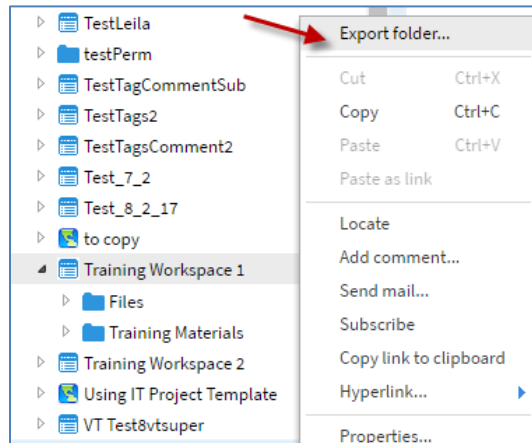
7. Fill in the **Edit properties** window – enter folder name (*if you wish, you can change the folder name*).
8. Click **Check In All Content and Finish**. The folder will be imported into D2.



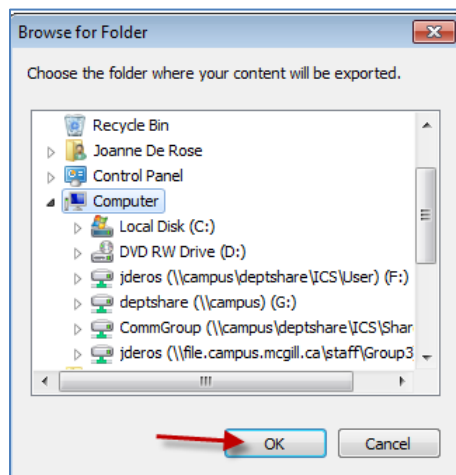
4.2.3 Export folder

Use to export a space or a folder to another destination. Note that the Content Transfer Mode must be set to **Documentum Client Manager** in order to do this. See [Appendix 2](#) for more information.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the space or the desired folder in the space.
4. Click **Export folder...**



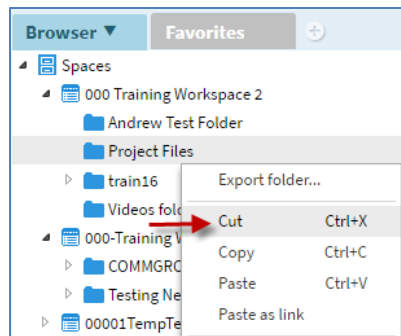
5. From the **Browse for Folder** window, select folder where your space or folder will be exported.
6. Click **OK**



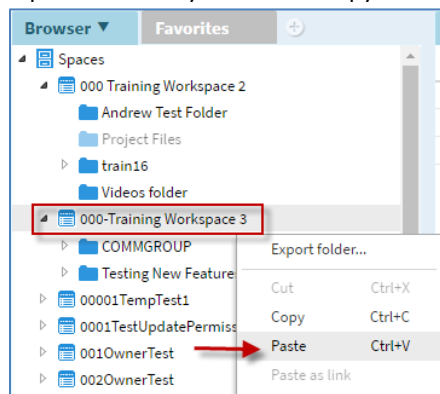
4.2.4 Move a folder

Use to move a folder from one location to another. The folder will be removed from the first location and placed in the second location.


1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space where the folder is located.
4. Right-click on the folder.
5. Click **Cut**.



7. Go to the space or folder you want to copy the folder to and click **Paste**.



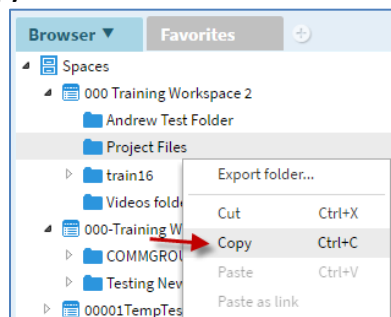
There is an alternate method to move a folder:

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space where the folder is located.
4. From the **Documents** widget, find the folder. (Note: to add the **Documents** widget, click on the  icon to select it from the **Widgets Gallery**).
5. Drag the folder to the new space or folder.

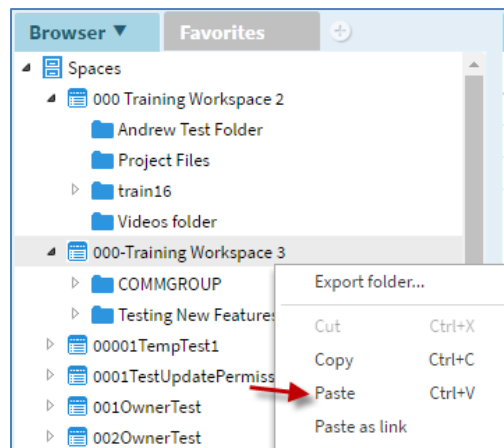
4.2.5 Copy a folder

Use to copy a folder from one location to another. The folder will be in both locations.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space where the folder is located.
4. Right-click on the folder.
5. Click **Copy**.




- Go to the space or folder where you want to copy folder to and click **Paste**.

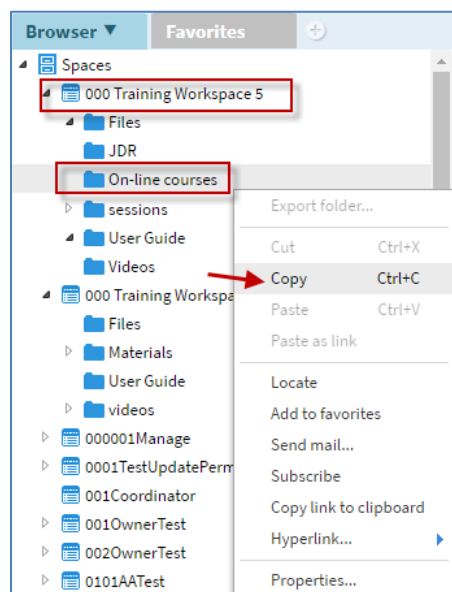


4.2.6 Link a folder

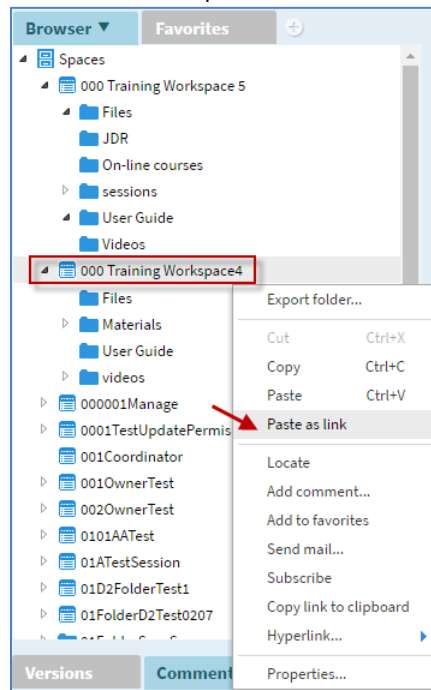
You can put a copy of a folder and paste into another space or folder. These are essentially the same folder. Therefore, if you “Paste as Link”, if a file is modified in one folder, it is also going to be modified in the other folder.

In D2, when you click in a folder that was pasted as link, you stay in the folder that you clicked on; you will see the original path in the **Location** widget. This used to work differently in CenterStage, where you were redirected to the original folder when you clicked in a folder pasted as a link.

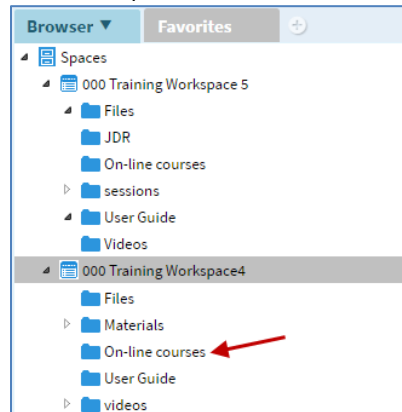
- Click **BROWSE** Workspace.
- Click the **Browser** widget.
- Click on the space name.
- The folders inside this space will be shown in the window of the **Documents** widget. (Note: to add the **Documents** widget, click  to select it from the Widgets gallery).
- Right-click on the folder that you want to copy.
- Select **Copy**.



7. Locate the space where you want to place the folder.
8. Right-click in the selected space and click **Paste as link**.



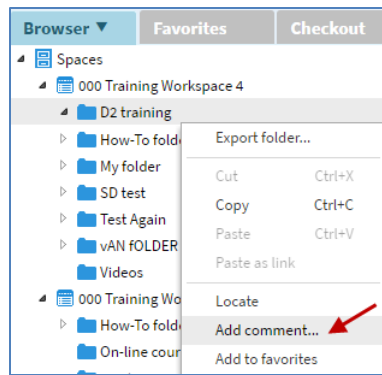
9. The folder will be copied to this location. They are the same folder.



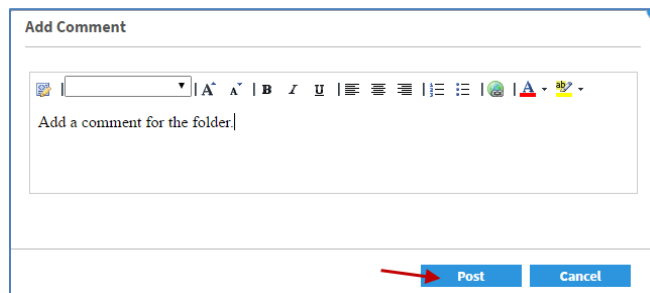
4.2.7 Add comment to a folder


Use to add comments to your folder.

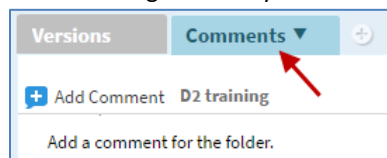
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right click on folder in the space.
4. Click **Add comment...**



5. The **Add Comment** window displays. Type the comment.
6. Click **Post**.



7. These are viewable in the **Comments** widget. If the **Comments** widget is not there, click on the  icon to select it from the Widgets Gallery.

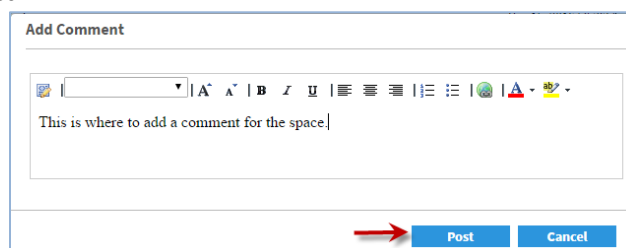


An alternate way to add comments is to use the **Comments** tab:

1. Click the **Browser** widget.
2. Click the folder name in the space.
3. Click the **Comments** widget (to add the **Comments** widget, click  to select it from the Widgets Gallery).
4. Click the  icon next to Add Comment.




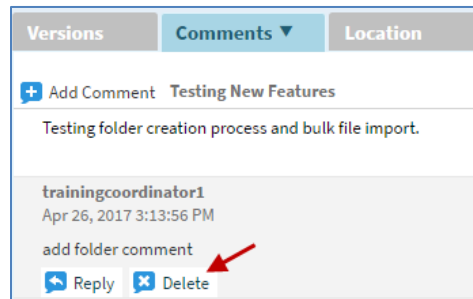
5. The **Add Comment** window displays. Type the comment.
6. Click **Post**.



4.2.8 Remove the comment from the folder

Use to remove comments from the folder.

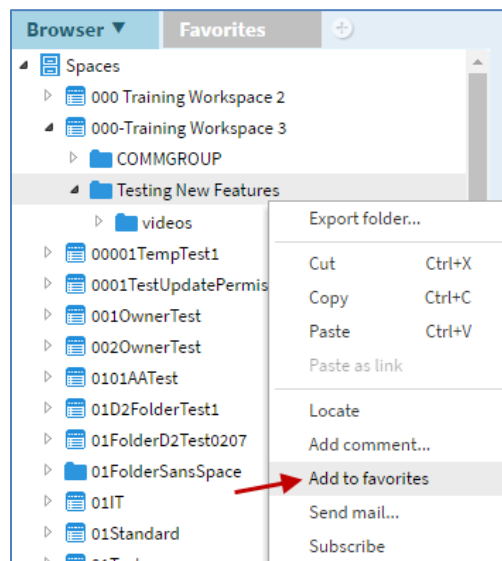
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click the folder name in the space.
4. Click the **Comments** widget (to add the **Comments** widget, click  to select it from the Widgets Gallery).
5. Select the comment you want to delete. You will see two options: **Reply** and **Delete**.
6. Click the **Delete** option.




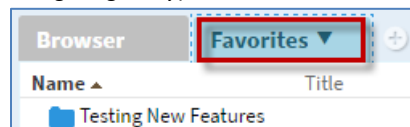
4.2.9 Add folder to favorites

Use to add the folder to the **Favorites** widget.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on folder name in the space.
4. Click **Add to favorites**




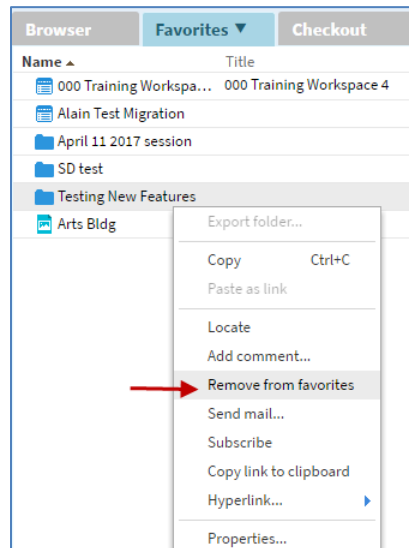
5. The folder now appears in the **Favorites** widget. (Note: to add the **Favorites** widget, click  to select it from the Widgets gallery).



4.2.10 Remove folder from favorites

Use to remove the folder from the **Favorites** widget.

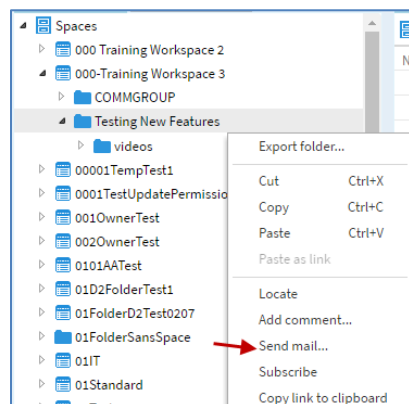
1. Click **BROWSE** Workspace.
2. Click the **Favorites** widget and locate the folder. (Note: to add the **Favorites** widget, click  to select it from the Widgets gallery).
3. Right-click on the folder name.
4. Click **Remove from favorites**.



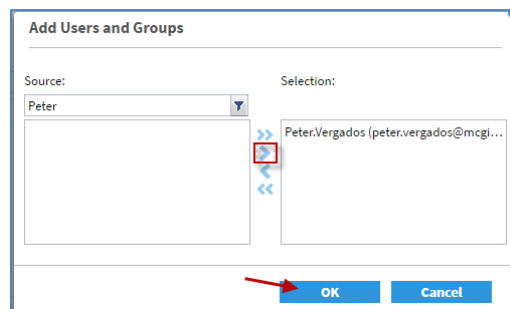
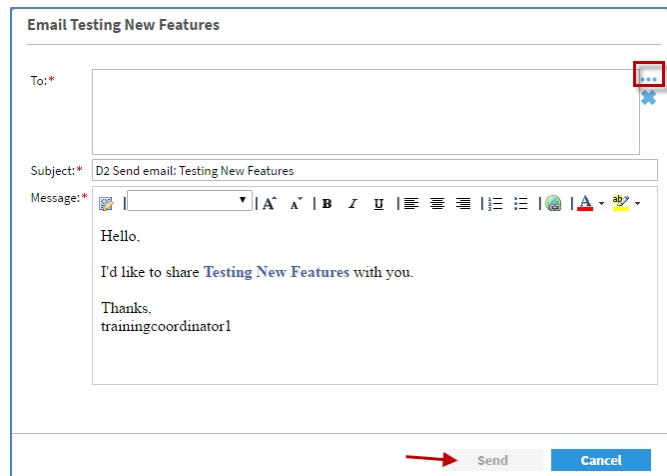
4.2.11 Send mail (folder)

Sends an email to the select user(s) with the folder url. However, the user has to be a member of the space and has to have permissions to the folder to be able to open the link.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the folder name.
4. Click **Send mail...**



5. The **Email** window displays. Select the recipient(s) of the email by clicking on the ******* icon.
 - a. In the **Add Users and Groups** window, type the name of the recipient in the **Source** field.
 - b. Click on the right arrow to move it to the **Selection** window.
 - c. Click **OK**.



6. The **Subject** field contains the subject.
7. Type a message in the **Message** area. This area also includes the url of the folder.
8. Click **Send**.

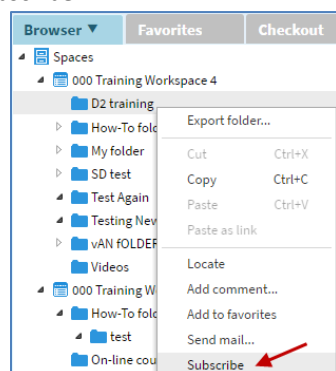
4.2.12 Subscribe to folder

Currently, space and folder subscriptions are not available. These features will be available in a future release of D2. At that time, we recommend that you only subscribe to the daily digest. Selecting instant notification as your subscription preferences (b and c below) may result in you receiving a great number of emails.

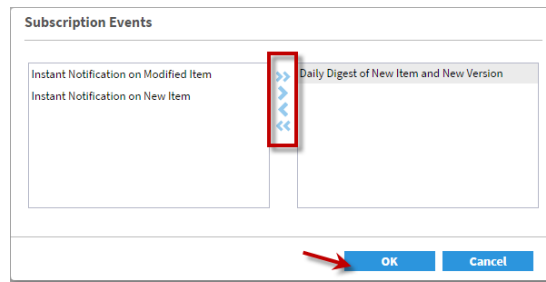
This allows you to be notified when a new item or a new version of an item has been added to the folder.

Subscriptions to sub-folders will not be possible.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the folder name.
4. Click **Subscribe**



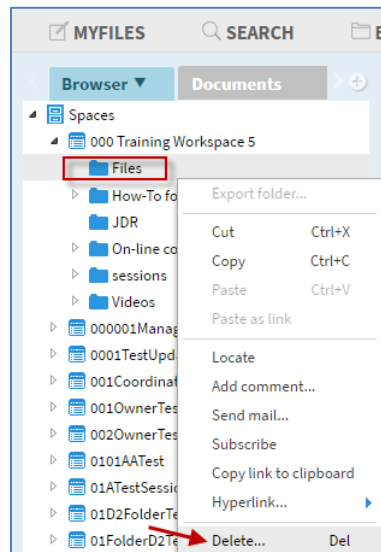
5. Select how you want to be notified. Click the right arrow ➤ to select your subscription preference.
 - a. **Daily Digest of New Item and New Version:** a daily report with all notifications for new or updated files within a folders that you have subscribed to will be emailed to you.
 - b. **Instant Notification on Modified Item:** you will receive an email when a file within a folder that you have subscribed to is updated. You will get one email per document.
 - c. **Instant Notification on New Item** you will receive an email when a new file is created in a folder you have subscribed to. You will get one email per document.
6. Click **OK**.



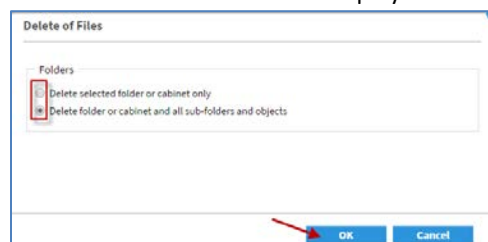
4.2.13 Delete a folder

This can only be performed if your group has the Delete permission.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the folder name.
4. Click **Delete...**



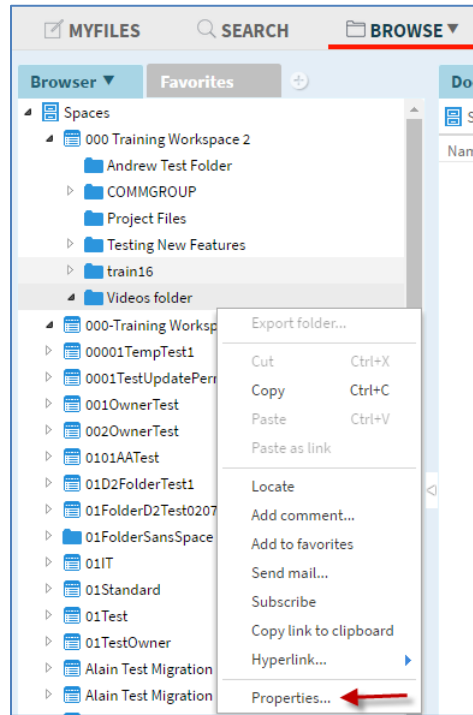
5. The **Delete of <folder name>** window displays. Select the desired option and click **OK**.



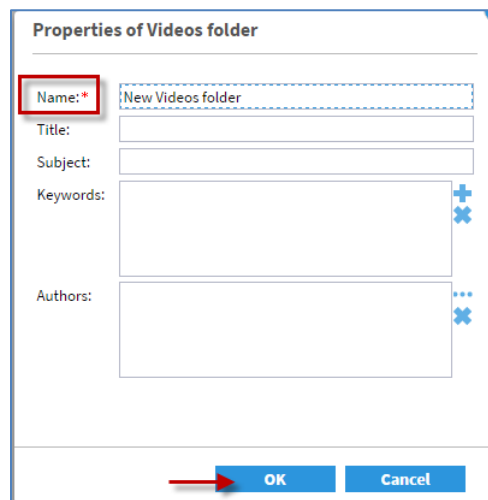
4.2.14 Rename folder

Use to change the folder name.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Locate the space that you want to rename a folder in.
4. Right click on the folder and select **Properties...**



5. The **Properties of <folder name>** displays. Type a new name in the **Name** field.
6. Click **OK**.

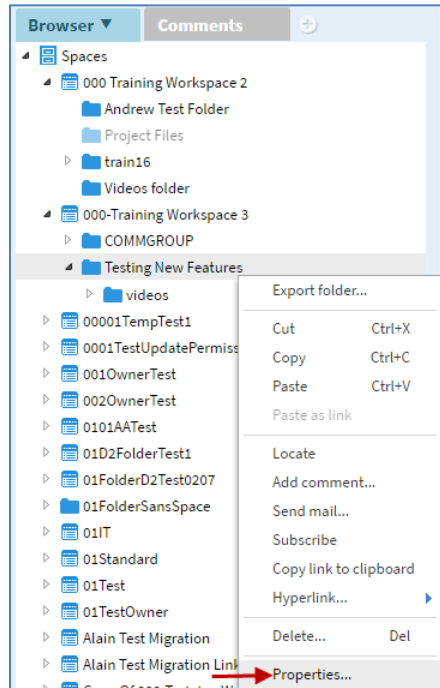


Note: you can also change the folder name by using the **Properties** widget. Click **Edit** to change the name. Then click **Save**.

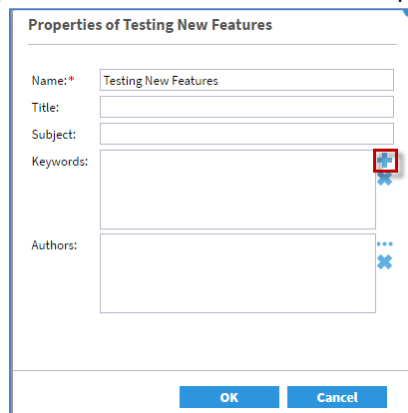
4.2.15 Add keywords to a folder

You can tag a folder by using keywords. Then the keywords can be used in the advanced search to search for folders using these keywords.

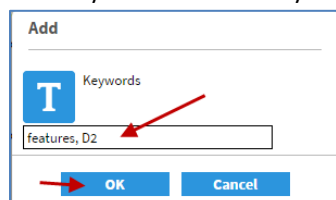
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the folder.
4. Click **Properties...**



5. The **Properties of <folder name>** window displays. Click the **+** icon from the **Keywords** field.



6. The **Add** window displays. Type the keyword in the **Keywords** field. If there is more than one keyword, separate them by commas. You may also add one keyword per line.



7. Click **OK**.
8. The **Properties of <folder name>** window displays. Click **OK**.

Properties of Testing New Features

Name: * Testing New Features

Title:

Subject:

Keywords: features, D2

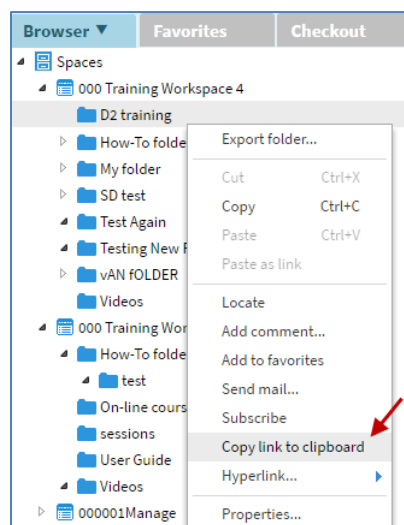
Authors:

OK Cancel

Note: you can also add a keyword to a folder by using the **Properties** widget. Click **Edit** to add/update keywords. Then click **Save**.

4.2.16 Copy folder link to clipboard

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the folder name.
4. Click **Copy link to clipboard**.



5. You can use this link from the clipboard (e.g. in a Word document). Use **“Ctrl + V”** or right-click and paste where you want to put the link.

4.3 Files

A files must be placed in a folder within a space. The steps required to import file(s) depend on the number of files and their properties. It is also possible to drag and drop a file (e.g. Word document) into the **Documents** widget.

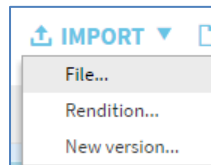
4.3.1 Import file(s)

To successfully import/create a file in a space, the following three conditions must be met:

- You must be in the **Browser** widget
- Select a folder in the space
- You need Write permission to this folder (*note that the space coordinator assigns permissions*)

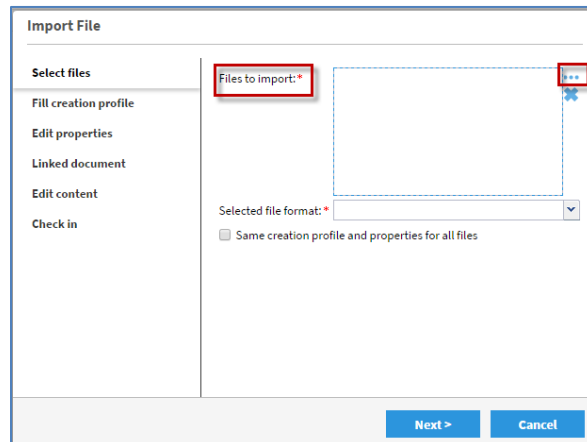
4.3.2 Import one file

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder that you want to import the file into. Click the folder.
4. From the menu, click **IMPORT > File**.

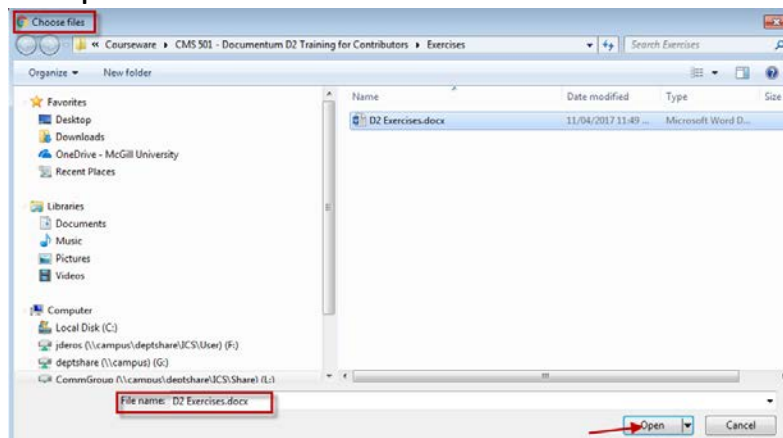


5. The **Import File** dialog window displays.

- a. From the **Select files** section, click **Files to import** from **Files to import** field.



- b. Find and select the file from the **Choose files** window.
- c. Click **Open**.



6. In the **Import File** dialog window, ensure that the **Select files** section is filled:
 - a. The **Files to import** field is filled in with the file name.
 - b. The **Selected file format** field is filled in with the format of the file (e.g. Word, Jpeg, Excel, Acrobat PDF).
 - c. Do not select the **Same creation profile and properties for all files** checkbox.
 - d. Click **Next**.

Import File

Select files

Files to import: * L:/Courseware/CMS 501 - Documentum D...

Selected file format: * MS Word Document 2007 / 2010

☐ Same creation profile and properties for all files

Next > **Cancel**

7. The **Edit properties** display. You can change the file name from the **Name** field. If you want to keep the same name, don't modify it. If you wish, you can also add **Title**, **Subject**, **Keywords**, **Authors** for the file.
 - a. The **Name** field is filled in for the file.
 - b. Click **Next**.
 - c. The **D2 Uploader** screen displays and the file is imported to your space in the selected folder.

Import File

Edit properties

File selection: D2 Exercises.docx

Name: * D2 Exercises.docx

Title:

Subject:

Keywords:

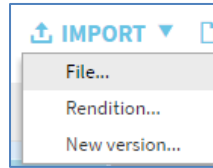
Authors:

Next > **Cancel**

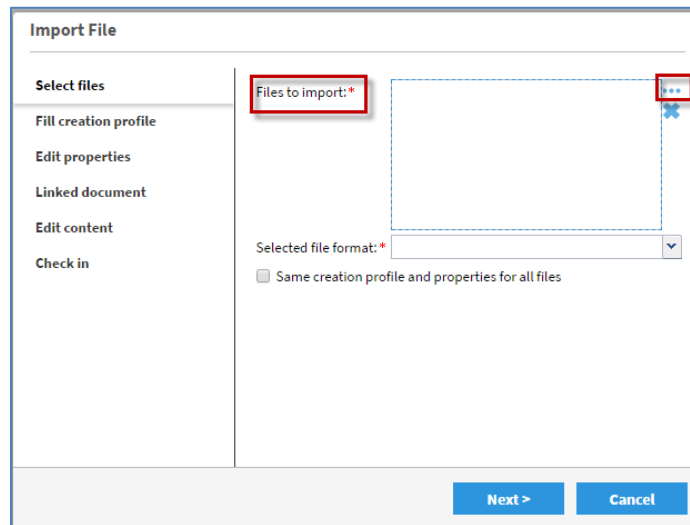
4.3.3 Import more than one file with same properties

From the menu panel, you can import files with the same file type (e.g. Word, Excel, pdf) into your space(s).

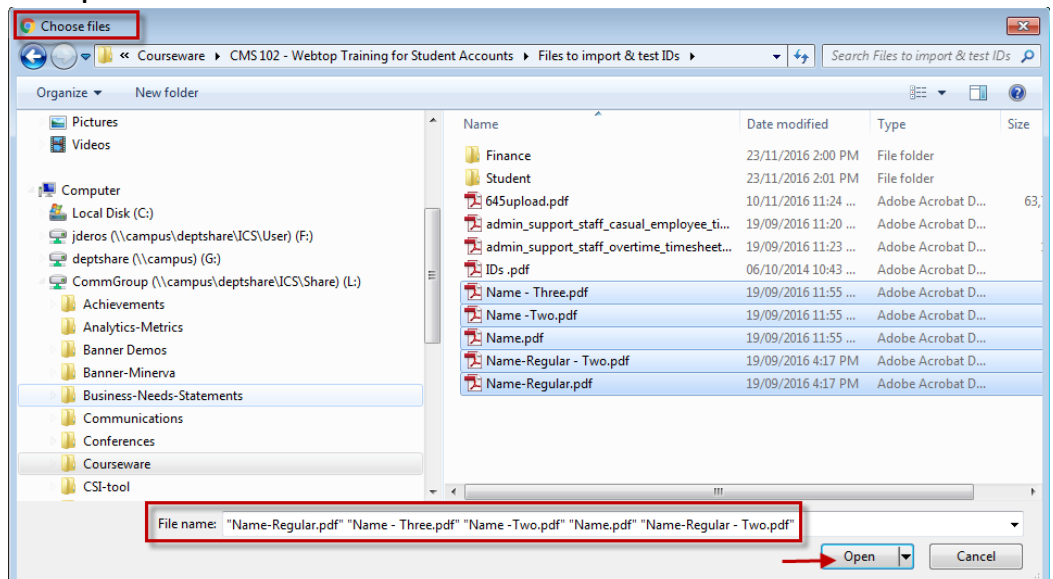
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder that you want to import the files into. Click the folder.
4. From the menu, click **IMPORT > File**.



5. The **Import File** dialog window displays.
 - a. From the **Select files** section, click **Files to import** field.



- b. Find and select the files with the same file format (e.g. Word, Excel, Jpeg) from the **Choose files** window.
- c. Click **Open**.



6. In the **Import File** dialog window, ensure that the **Select files** section is filled:
 - a. The **Files to import** field is filled in with the file names.
 - b. The **Selected file format** field is filled in with the same format of the files (e.g. Word, Jpeg, Excel, Acrobat PDF).
 - c. Select the **Same creation profile and properties for all files** checkbox.
 - d. Click **Next**.

Import File

Select files

Fill creation profile

Edit properties

Linked document

Edit content

Check in

Files to import: *

L:/Courseware/CMS 102 - Webtop Training...
L:/Courseware/CMS 102 - Webtop Trainin...
L:/Courseware/CMS 102 - Webtop Trainin...
L:/Courseware/CMS 102 - Webtop Trainin...
L:/Courseware/CMS 102 - Webtop Trainin...

Selected file format: * Acrobat PDF

☒ Same creation profile and properties for all files

Next > **Cancel**

8. In the **Edit properties** section, you can change the name of the file from the **Name** field. If you want to keep the same name, don't modify it. If you wish, you can also add **Title**, **Subject**, **Keywords**, **Authors** for the file.
 - a. The **File selection** field contains the names of the files.
 - b. The **Name** field contains [filename] for this file.
 - c. Click **Next**.

Import File

Select files

Fill creation profile

Edit properties (1/5)

Linked document

File selection: Name - Three.pdf; Name -Two.pdf; Name.pdf; Name...

Name: * [filename]

Title:

Subject:

Keywords:

Authors:

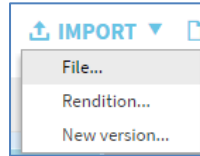
Next > **Cancel**

8. The **D2 Uploader** screen displays for each file and the files will be imported to your space.

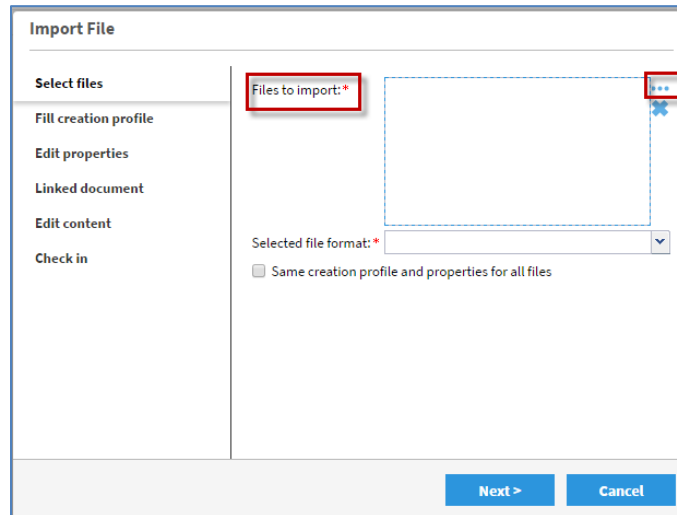
4.3.4 Import more than one file with different properties

From the menu panel, you can import different types of files into your space(s). You can add all file types (e.g. Word, Excel, pdf, txt, etc.)

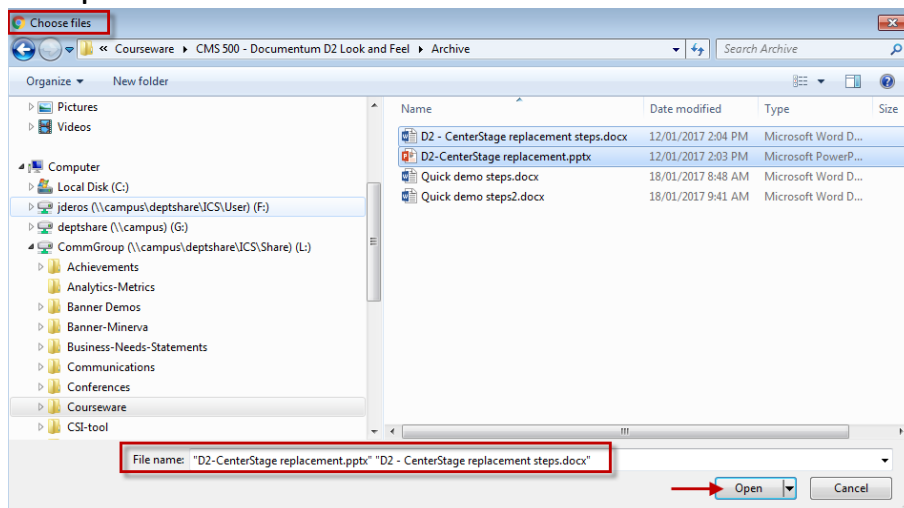
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder that you want to import the files into. Click the folder.
4. From the menu, click **IMPORT > File**.



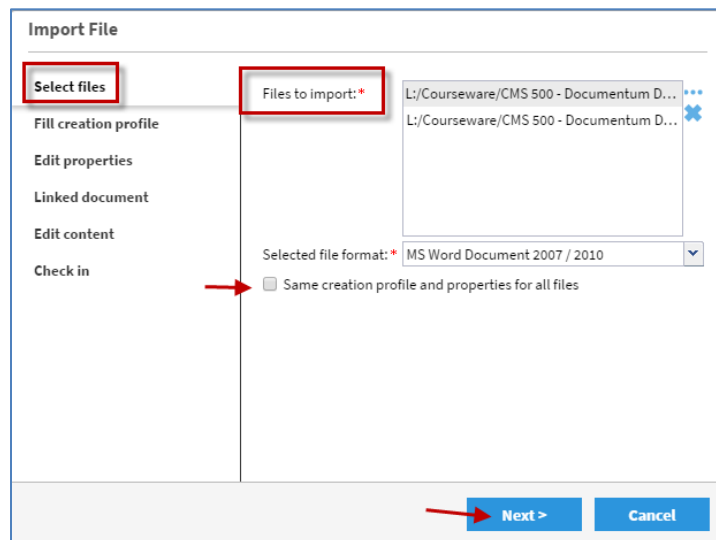
5. The **Import File** dialog window displays.
 - a. From the **Select files** section, click **Files to import field**.



- b. Find and select the file(s) from the **Choose files** window. They may have different file formats (e.g. Word, Excel, Jpeg)
- c. Click **Open**.



6. In the **Import File** dialog window, ensure that the **Select files** section is filled:
 - a. The **Files to import** field is filled in with the file names.
 - b. The **Selected file format** field is filled in with the format of the files (e.g. Word, Jpeg, Excel, Acrobat PDF).
 - c. Do not select the **Same creation profile and properties for all files** checkbox.
 - d. Click **Next**.

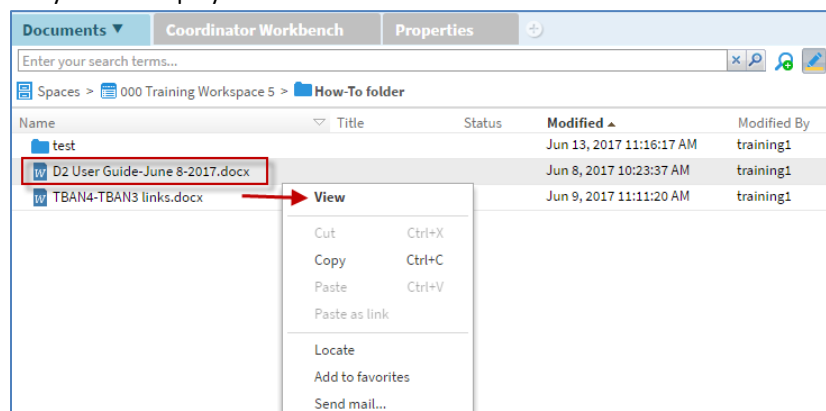


9. For each file, the **Edit properties** display. You can change the name of the file from the **Name** field. If you want to keep the same name, don't modify it. If you wish, you can also add **Title**, **Subject**, **Keywords**, **Authors** for the file.
 - a. In the **Edit properties** section, the **Name** field is filled in for the file.
 - b. Click **Next**.
 - c. The **D2 Uploader** screen displays and the file is imported to your space.

4.3.5 View file

From the menu panel, you can view files in your space. Or you can simply double-click on the file.

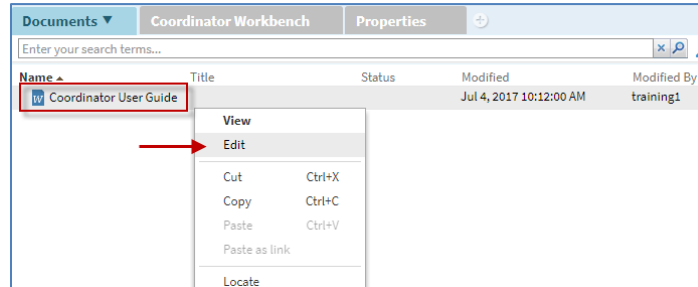
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder where the file is located.
4. Right click on file and select **View**. Or, you may simply double-click on the file. The **D2 Downloader** screen appears and your file displays.



4.3.6 Edit file

From the menu panel, you can edit files in your space(s). When you edit a file, it is checked out. No one else can edit this file until you check it back in.

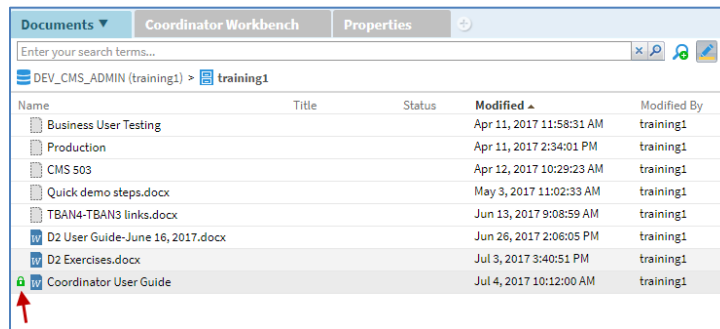
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder where the file is located.
4. Select the file and right click on it.
5. Select **Edit**.



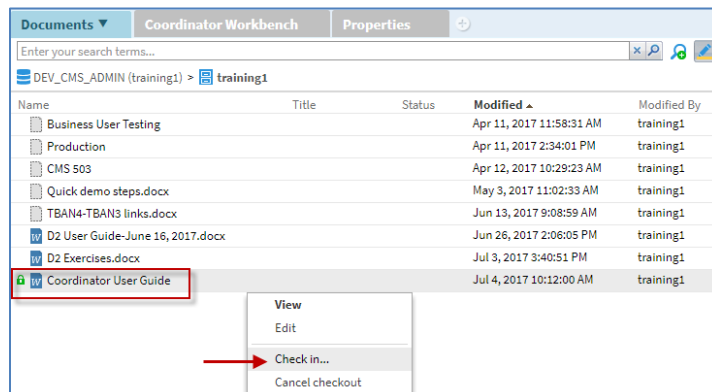
6. The **D2 Downloader** opens the file.
The steps that follow depend on the browser you are using and the Content Transfer Modes you selected (see [Appendix 1](#) and [Appendix 2](#) for more details).

For example, if the browser plugin is Documentum Client Manager and the browser is Chrome, the file is stored on **C:\Downloads** by default (refer to the [User Profile – General tab](#) for more details). When you check in the file, the file will be removed from this local folder on your PC. These are the steps:

- a. A lock will display next to the file



- b. Make changes. Save and close the file.
- c. Right click on the file and select **Check in**.



- d. Fill out **Check-in** window – General tab. Select the version of the file in the **Check in version as** field.
- e. In the **Description** field, you may enter a version comment.
- f. Click **OK**. The **D2 Uploader** will update the file in D2 and remove the lock. The file will then be removed from the local folder on your PC (by default, **C:\Downloads**).

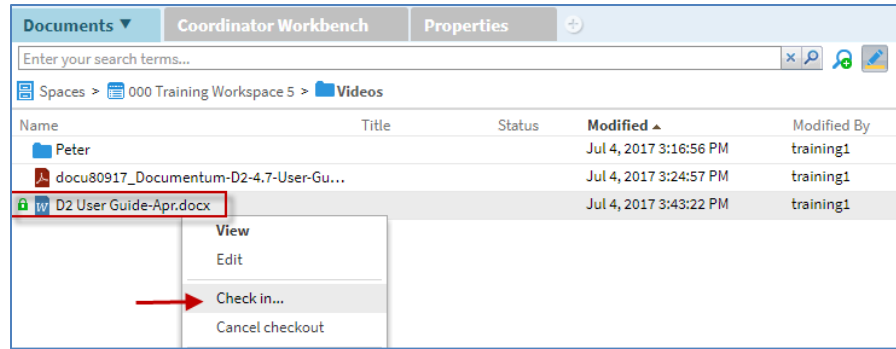
For example, if the browser plugin is [Documentum Client Manager](#) and your browser is [Firefox](#), the file will be downloaded on your local PC. To check in the file, browse for it and upload it from there. These are the steps:

- a. A lock will display next to the file.

Name	Title	Status	Modified	Modified By
Peter			Jul 4, 2017 3:16:56 PM	training1
docu80917_Documentum-D2-4.7-User-Gu...			Jul 4, 2017 3:24:57 PM	training1
D2 User Guide-Apr.docx			Jul 4, 2017 3:43:22 PM	training1

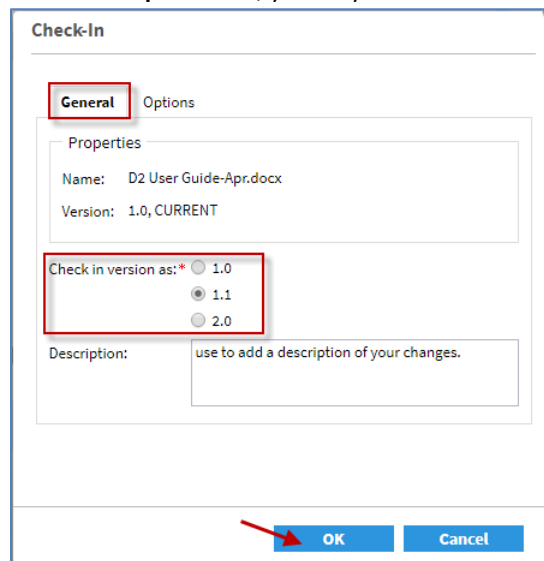
- b. The following displays. Click **OK**.

- c. The file will open. Make changes and save. You will be prompted to save the file to a location.
- d. Right click on the file in D2 and select **Check-in...**

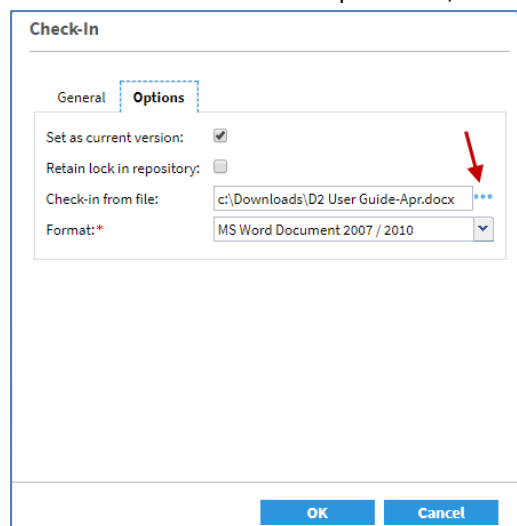


d. Fill out **Check-in** window – General tab. Select version of the file in the **Check in version** as field.

f. In the **Description** field, you may enter a version comment.



g. From the **Check-In** window - Options tab, fill in the **Check-in from file** field. Click ... to locate file.

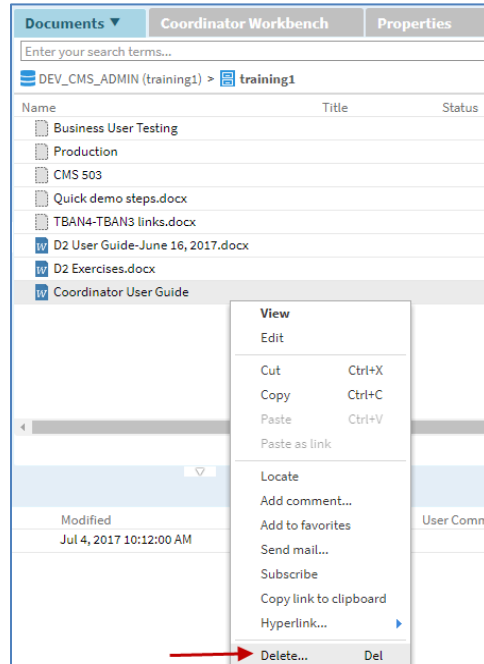


h. Click **OK**. The **D2 Uploader** will update the file in D2 and remove the lock.

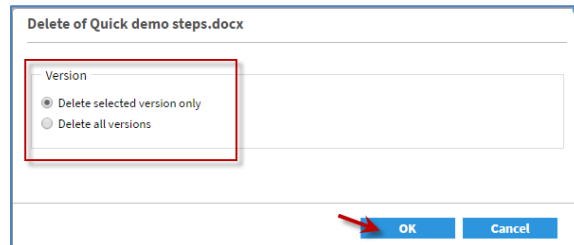
4.3.7 Delete file

Permission to delete files in your space is not granted by default. You can delete a file if the space coordinator has granted the Delete permission to the group that you belong.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder where the file is located.
4. From the **Documents** widget, select the file and right click on it.
5. Select **Delete...**



6. The **Delete of <file name>** popup menu will open. You have to decide whether you want to delete the current version or all versions of this file.



7. Select the appropriate version option and click **OK**.
8. If you have the required delete permission on your account then the selected file or versions will be deleted.

Note

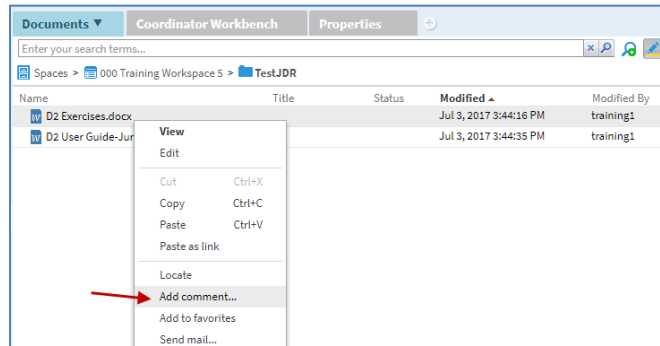
If you select **Delete the selected version only**, then the current version of the file will be deleted and the file will go back to the previous version.

If you select **Delete all versions**, then all the versions of the file will be deleted and the file will not exist in the space anymore.

4.3.8 Add Comment to a File


From the menu panel, you can add comments to files in your space(s).

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder where the file is located.
4. Select the file and right click on it.
5. Select **Add comment**.





6. The **Add Comment** text panel opens where you can add the comment.
7. Click **Post**.



8. These are viewable in the **Comments** widget. (Note: to add the **Comments** widget, click  to select it from the **Widgets Gallery**).


An alternate way to add comments is to use the **Comments** tab:

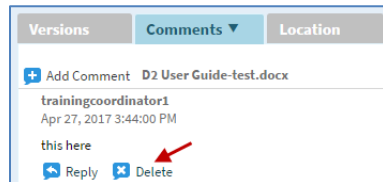
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Go to the space and folder where the file is located.
4. Click the file name.
5. Click the **Comments** widget. (To add the **Comments** widget, click  to select it from the **Widgets gallery**).
6. Click the  icon next to Add Comment.
7. The **Add Comment** text panel opens where you can add the comment.
8. Click **Post**.



4.3.9 Remove the comment from the file

Use to remove comments from the file.

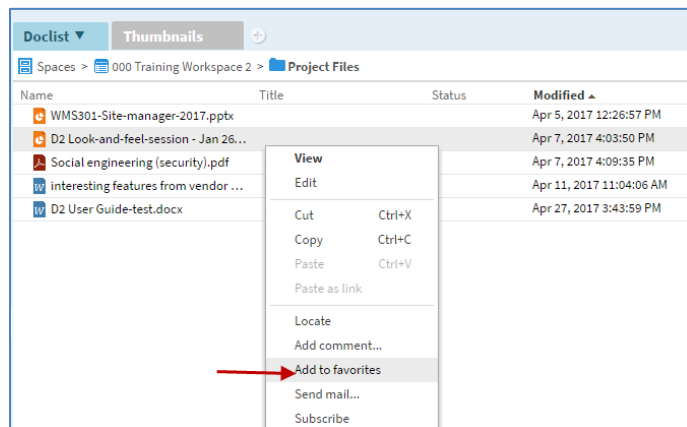
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click the file name from the **Documents** widget.
4. Click the **Comments** widget. (Note: to add the **Comments** widget, click  to select it from the Widgets gallery).
5. Select the comment you want to delete. You will see two options: **Reply** and **Delete**.
6. Click the **Delete** option.




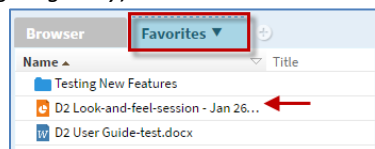
4.3.10 Add file to favorites

Use to add the file to the **Favorites** widget.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. From the **Documents** widget, right-click on file name.
4. Click **Add to favorites**




11. The file now appears in the **Favorites** widget. (Note: to add the **Favorites** widget, click  to select it from the Widgets gallery).

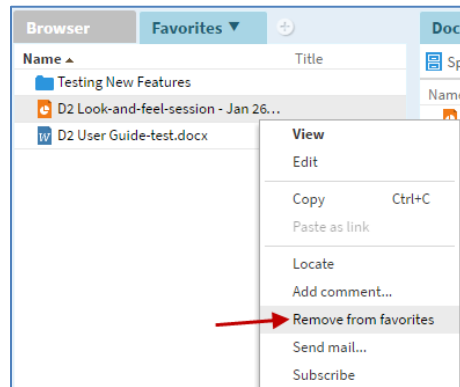


4.3.11 Remove the file from favorites

Use to remove the folder from the **Favorites** widget.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. From the **Favorites** widget, right-click on the file name. (Note: to add the **Favorites** widget, click  to select it from the Widgets gallery).

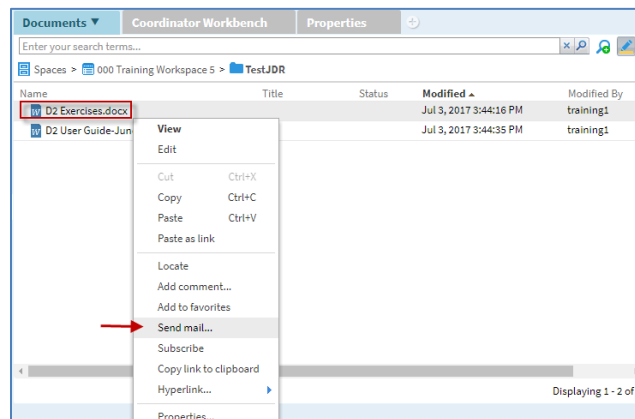
- Click **Remove from favorites**.



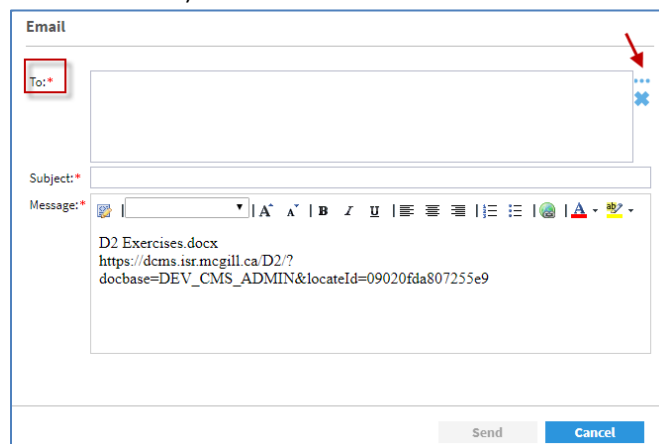
4.3.12 Send mail (file)

You can use the **Send mail** option to send an email to another space member.

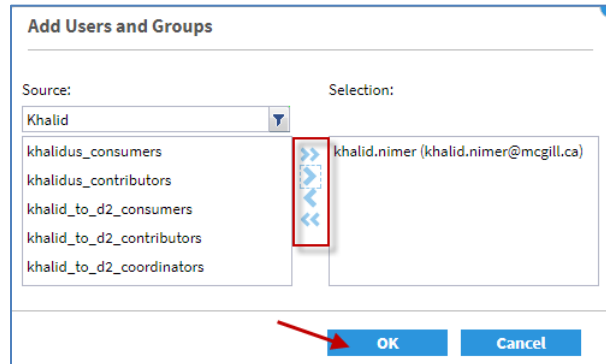
- Click **BROWSE** Workspace.
- Click the **Browser** widget.
- Go to the space and folder where the file is located.
- Right click on the file.
- Select **Send mail**



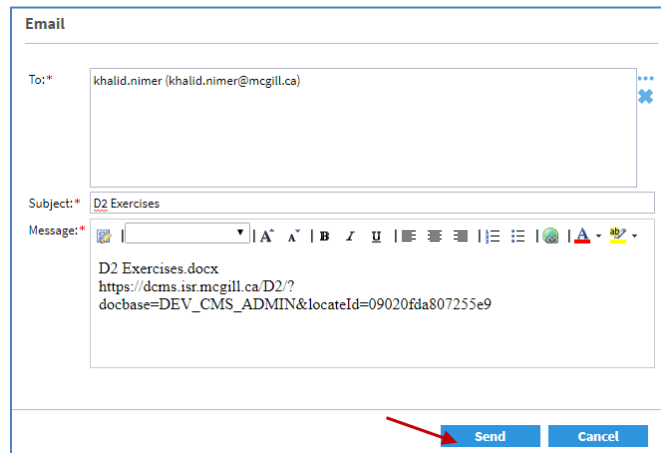
- The **Email** window opens. Click the *** button to select the recipients of the email (user/group that you wish to send the email to).



7. Type the user or group in the **Source** field.
8. Click ➤ to add the user or group to the **Selection** area on the right-hand side.
9. Click **OK**



10. The **Subject** area contains the file name.
11. The **Message** area contains the url of the file.
12. Click **Send**.

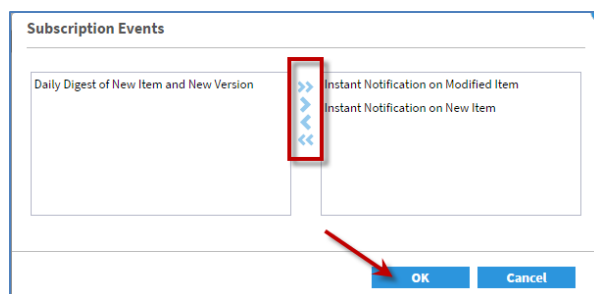


13. The person will receive an email with the url of the file.

4.3.13 Subscribe to file


File subscriptions are functioning in this release of D2. This allows you to be notified when a new file or a new version of a file has been added.

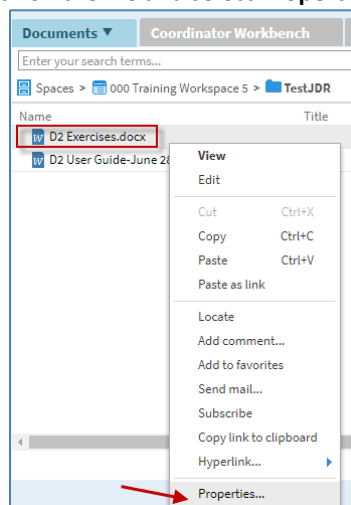
1. Right click on file name.
2. Click **Subscribe**
3. Select how you want to be notified. Click the right arrow ➤ to select your subscription preference.
 - a. **Daily Digest of New Item and New Version:** a daily report with all notifications for a new version of the file or updates made to the file will be emailed to you.
 - b. Select **Instant Notification on Modified Item:** you will receive an email when a file that you have subscribed to is updated. You will get one email per document.
 - c. Select **Instant Notification on New Item:** you will receive an email when a new copy of the file you have subscribed to is created. You will get one email per document.
4. Click **OK**.



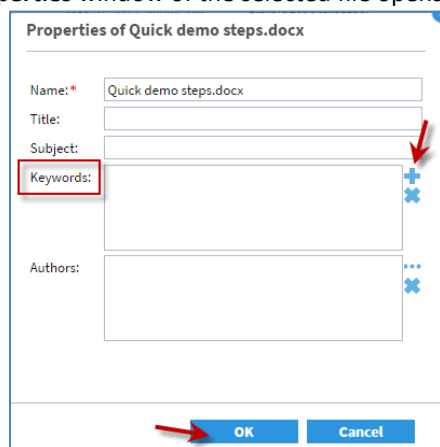
4.3.14 Add keywords to a file

You can tag a file by using keywords. Then the keywords can be used in the advanced search to search for files using these keywords. To add the keyword(s) to a file in D2:

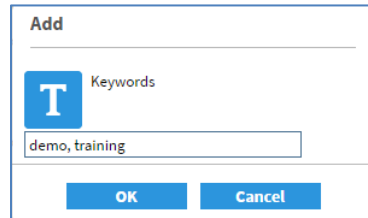
1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space name and folder where the file to which you want to add keywords is located.
4. The folders and files inside this space will be shown in the window of the **Documents** widget. (Note: to add the **Documents** widget, click  to select it from the **Widgets** gallery).
5. Locate the file (within the folder) that you want to add keyword to.
6. Right-click on the file and select **Properties**.



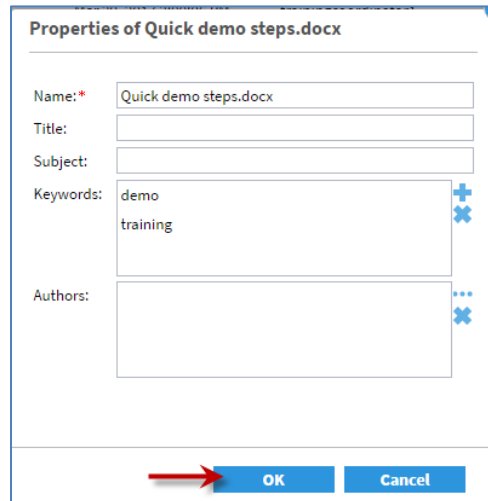
7. The **Properties** window of the selected file opens. Click the  button near the keyword.



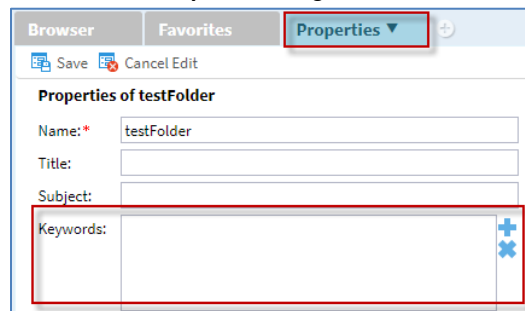
8. The **Add** window displays. Add a keyword and click **OK**. If you need to add another keyword, repeat for each keyword. Or you can add more than one keyword, separated by commas (e.g. demo, training).

A small dialog box titled "Add". It has a blue square icon with a white letter 'T' and the label "Keywords" next to it. Below this is a text input field containing the text "demo, training". At the bottom are two buttons: "OK" and "Cancel".

9. Click **OK**. The Keyword(s) will be added to the file.


A dialog box titled "Properties of Quick demo steps.docx". It has several fields: "Name:" with "Quick demo steps.docx", "Title:", "Subject:", "Keywords:" with "demo" and "training" listed, and "Authors:". There are plus and minus icons next to the Keywords and Authors fields. At the bottom are "OK" and "Cancel" buttons. A red arrow points to the "OK" button.

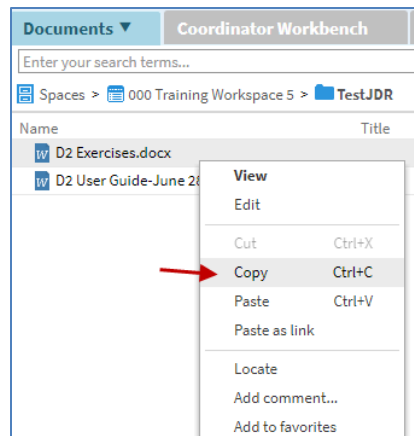
*Note: You can also use the **Properties** widget. Click **Edit** to add/update keywords; enter the **Keywords** field.*

A screenshot of a software interface showing a "Properties" widget. The widget has tabs for "Browser", "Favorites", and "Properties". The "Properties" tab is selected. It shows fields for "Name:" (testFolder), "Title:", "Subject:", and "Keywords:". The "Keywords:" field is highlighted with a red rectangle. There are plus and minus icons next to the "Keywords:" field.

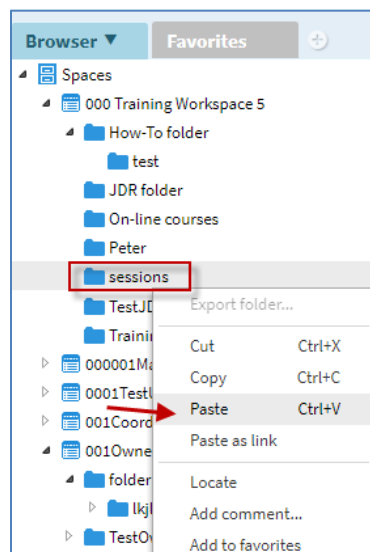
4.3.15 Copy a File

You can copy files from a folder within a space and paste into another location. **Paste** simply creates another copy of the file.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space name.
4. The folders and files inside this space will be shown in the window of the **Documents** widget. *Note: to add the **Documents** widget, click  to select it from the Widgets gallery).*
5. Locate the file that you want to copy. If it is inside a folder, click in this folder to find the file.
6. Right-click on the file and click **Copy**.




7. Locate the space and folder where you want to copy the file to.
8. Right-click in the selected folder of the space and click **Paste**

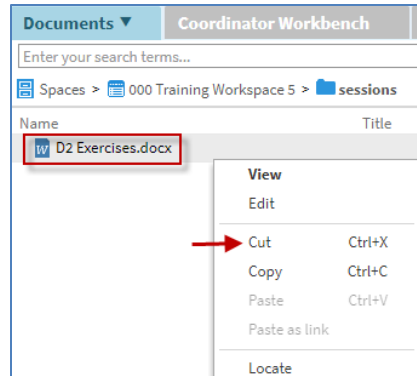


9. The file will be copied to this location.

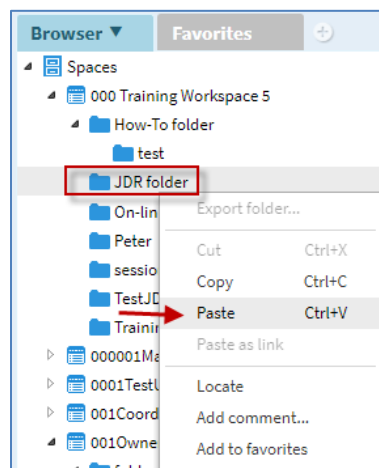
4.3.16 Move a file

You can remove the file from your space folder and paste into another folder or in a folder in another space.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space name.
4. The folders and files inside this space will be shown in the window of the **Documents** widget. *(Note: to add the **Documents** widget, click  to select it from the Widgets gallery).*
5. Locate the file that you want to copy. If it is inside a folder, click in this folder to find the file.
6. Right-click on the file and click **Cut**.




7. Locate the space and folder where you want to place the file.
8. Right-click in the selected space and folder and click **Paste**

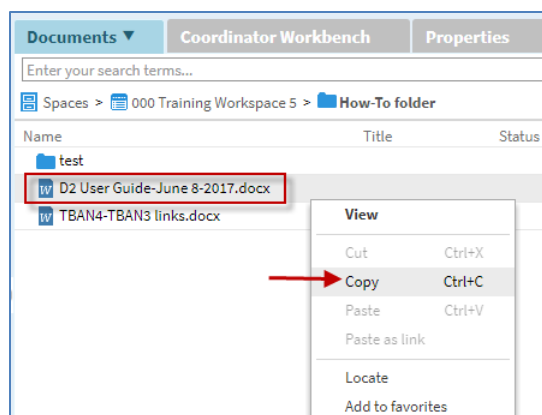


9. The file will be moved to this location.

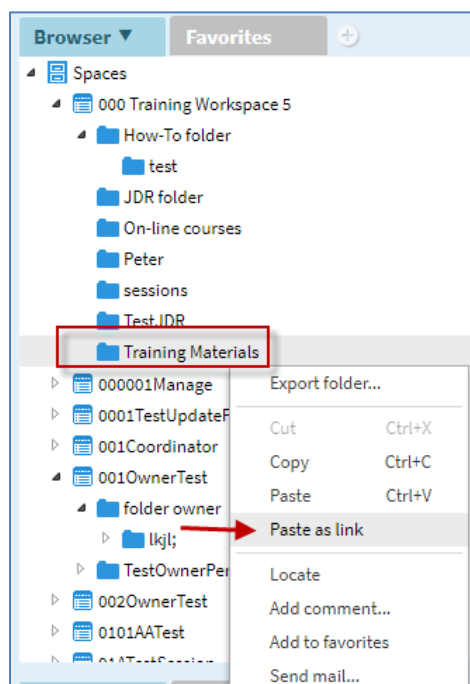
4.3.17 Link a File

You can put a copy of a file from your space(s) or folder and paste into another space or folder. These are essentially the same files. Link puts the same file in two different folders. Therefore, if you “paste as link”, if the file is modified in one folder, it is going to be modified in the other folder as well.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Click on the space name.
4. The folders and files inside this space will be shown in the window of the **Documents** widget. (Note: to add the **Documents** widget, click  to select it from the Widgets gallery).
5. Locate the file that you want to copy. If it is inside a folder, click in this folder to find the file.
6. Right-click on the file and click **Copy**.



7. Locate the space and folder where you want to place the file.
8. Right-click in the selected space and folder and click **Paste as link**.



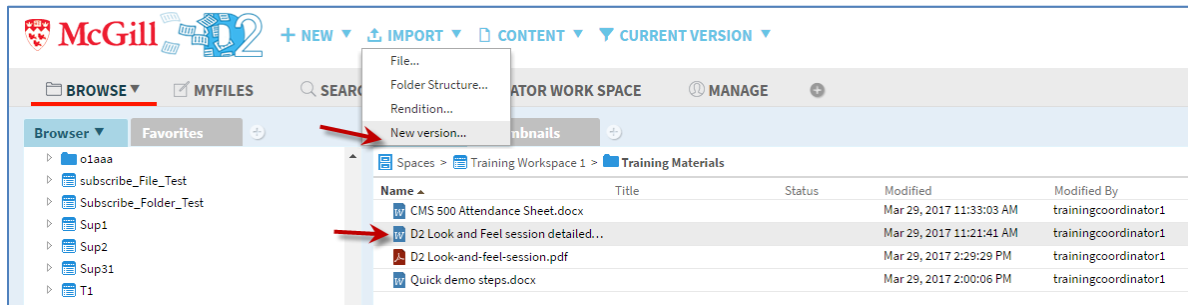
9. The file will be copied to this location. They are the same file.

4.3.18 Import new version of a file

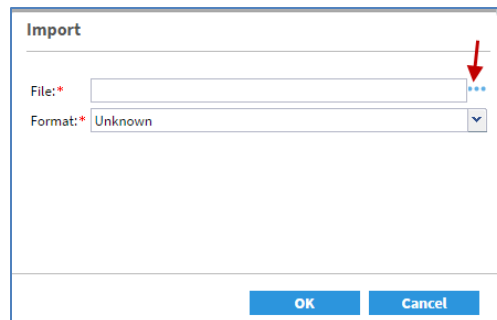
From the menu pane, import a new version of a file into D2, if you have the appropriate rights.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Locate the space and folder where the file is located. Select the file.

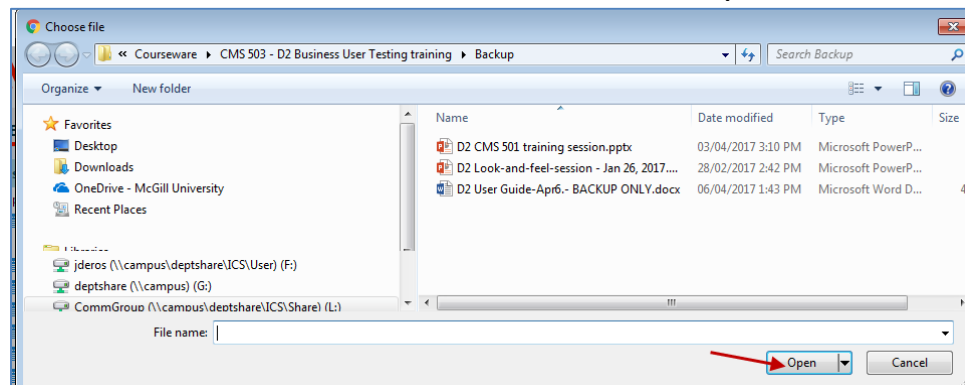
4. From the menu, click **IMPORT > New version**.



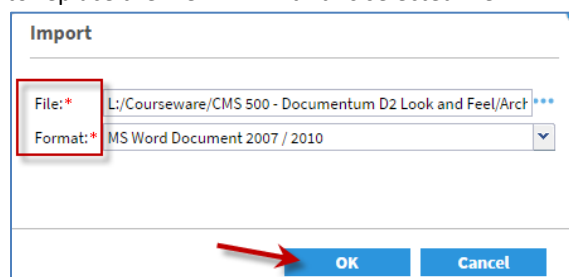
5. The file in D2 is now locked. The **Import** window displays. Click **...** from **File** field.



6. From the **Choose file** window, locate the new version of the file and click **Open**.



7. Click **OK** to replace the file in D2 with this selected file.

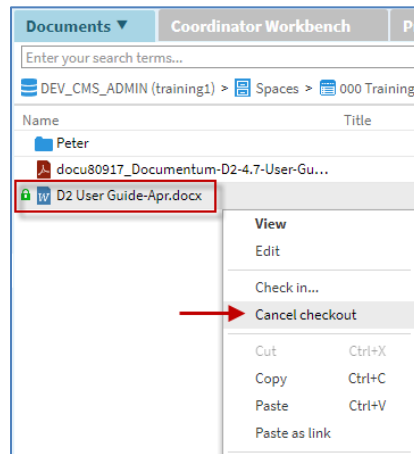


8. The **Check-In** window displays. Select the version of the file in the **Check in version as** field.
9. In the **Description** field, you may enter a comment.
10. Click **OK**.

4.3.19 Cancel checkout

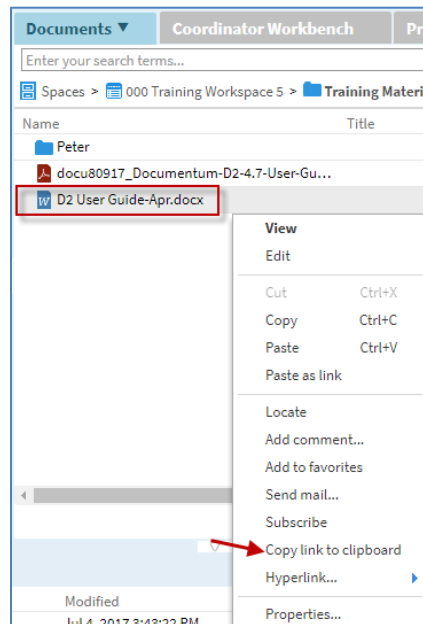
When you edit a file, the file is checked out. If you change your mind about editing, you can cancel the checkout.

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Locate the space and folder where the file is locked.
4. Right click on the file
5. Select **Cancel Checkout**



4.3.20 Copy file link to clipboard

1. Click **BROWSE** Workspace.
2. Click the **Browser** widget.
3. Right-click on the file name.
4. Click **Copy link to clipboard**.

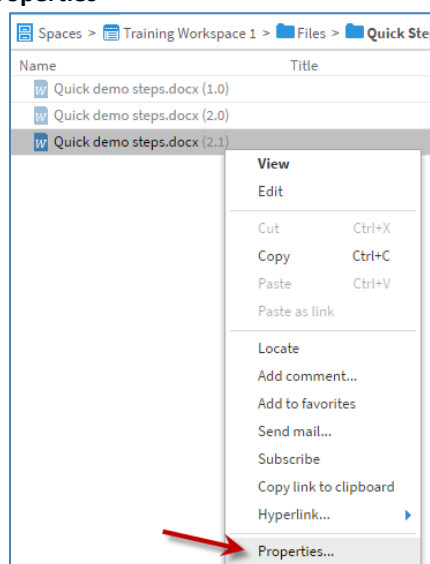


5. You can use this link from the clipboard (e.g. in a Word document). Use "**Ctrl + V**" or right-click and paste where you want to put the link.

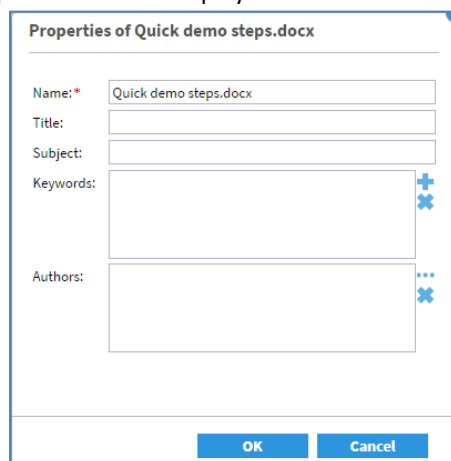
4.3.21 File properties

Use to view and modify the properties of a file. You can add title, subject, keywords, and authors.

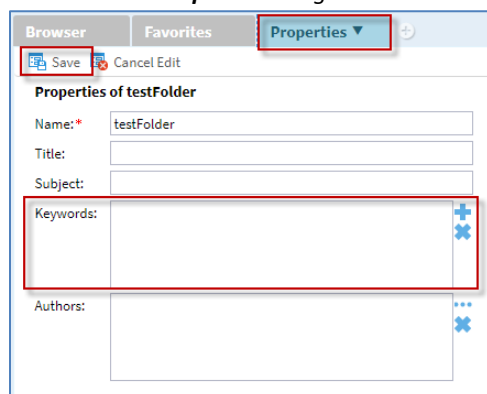
1. Right click on the file.
2. Select **Properties**



3. The **Properties** window displays.



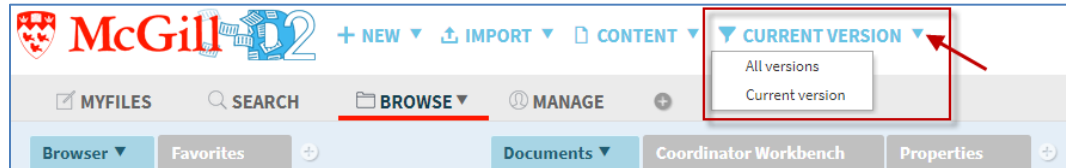
Note: You can also use the **Properties** widget. Click **Edit** to add keywords; enter the **Keywords** field. Click **Save**.



4.4 Versions

You can see the versions of a file. This will change the version view for all the files in your space. This means that, if you select “**All Versions**”, for example, then it will display all versions for all files, and not just for a particular file. If you select “**Current version**”, only the current versions for all files display.

1. Go to the space and folder where the file is located.
2. From the D2 menu, click the down arrow next to **CURRENT Version** or **ALL VERSIONS**.
 - a. Select **Current version** to only see the current versions of the files
 - b. Select **All versions** to see all versions of the files.



Another way to see the versions of a file is to use the widget called **Versions**.

A screenshot of the 'Versions' widget in the D2 interface. It has two tabs: 'Versions' (selected) and 'Comments'. Below the tabs is a table with four columns: 'Name', 'Version Label', 'Modified', and 'Modified By'.

Name	Version Label	Modified	Modified By
D2 User Guide-Apr.docx (1.0)	1.0, CURRENT	Jul 4, 2017 3:43:22 PM	training1
TBAN4-TBAN3 links.docx (0.1)	0.1	Jun 9, 2017 11:12:53 AM	training1

5. Search

D2 provides a full-text search and searches your entire site. You can use multiple search terms, and search for word(s) in content name, title, keywords, subject, metadata and content. You can use the [advanced search](#) to search in specific space(s).

Note: there may be a delay when performing a search. For example, if you add a keyword for a file, you may have to wait a few minutes before being able to search by that keyword.

Note

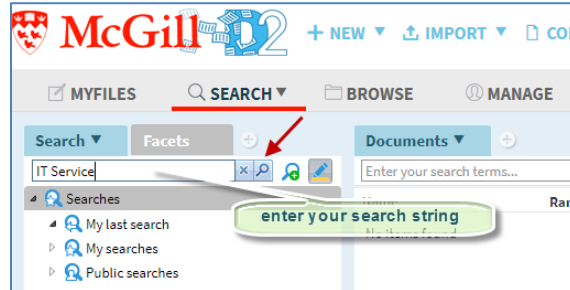
- Use the **Search** widget from the Search workspace for searches.
- **My last search** is used to re-run your last search.
- **My searches** are the searches that you saved using the advanced search (this is explained in the [Advanced Search](#) section below).

A screenshot of the 'Search' widget in the D2 interface. It has two tabs: 'Search' (selected) and 'Facets'. Below the tabs is a search input field with the placeholder text 'Enter your search terms...'. Below the input field is a list of search results under the heading 'Searches'. The list includes 'My last search', 'My searches', and 'Public searches'. Red arrows point to 'My last search' and 'My searches'.

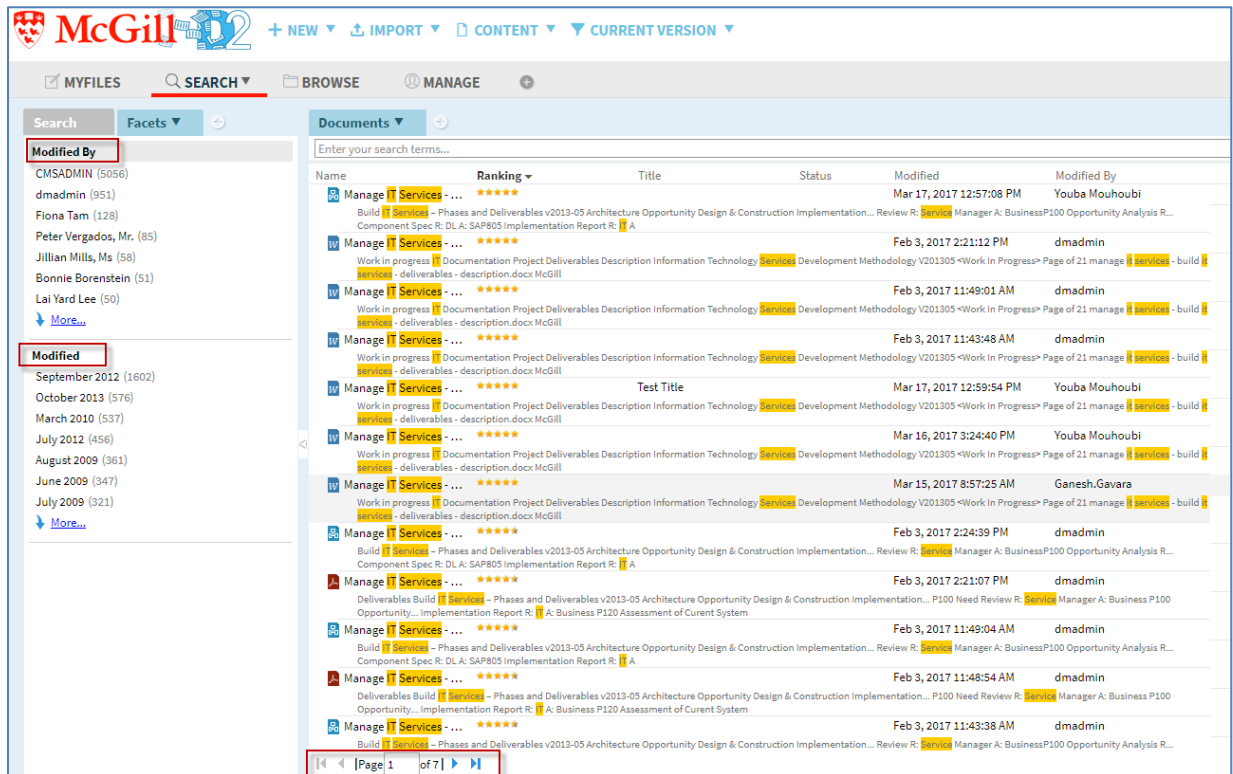
5.1 Global Search

This will search for this text (search terms) in all your spaces (including public spaces).

1. Select the **Search** workspace.
2. From the **Search** widget, enter your search string and click on the magnifying glass.




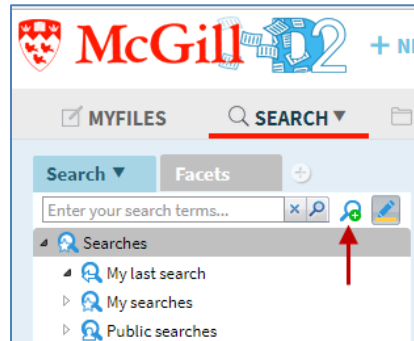
3. The results of the search will display in the **Documents** widget. Note that when a folder has more than 1000 files, the first 1000 files will be listed and a filter automatically displays. For more information, see the [Documents widget section](#).
4. You can filter the results by using the **Modified By**, **Modified** date and **Keywords** from the left. You can also scroll through the pages of the results by using the arrows at the bottom of the results page.





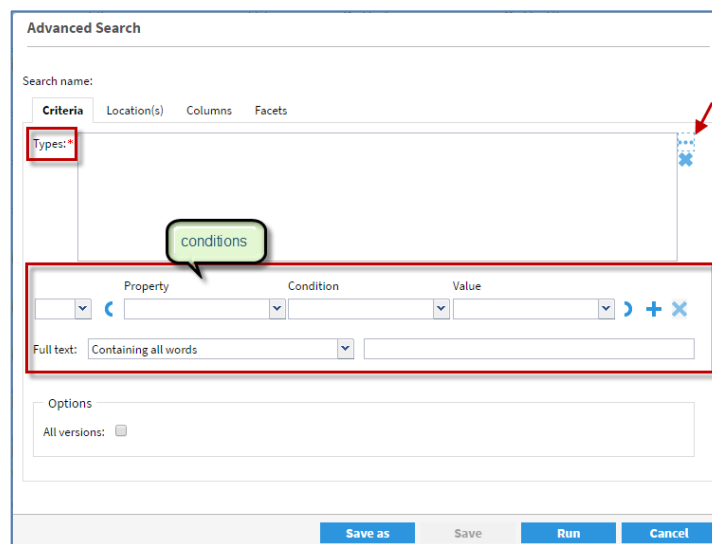
5.2 Advanced Search

The advanced search allows us to filter and give more details about the objects (folders, documents) we are searching for. For example, we can search folders or documents by type, author, or object name. We can also search for them in a specific space or folder.

1. Select the **SEARCH** workspace.
2. From the **Search Widget**, click on the **Advanced Search** button .





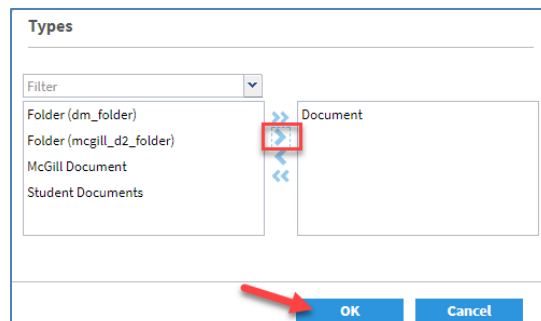
3. The **Advanced Search** dialogue box allows you to filter your search. You can select types and add conditions as indicated in the screenshot below. To filter by type, click  from the **Criteria** tab to select the desired types (Folder, McGill Document). You may enter more than one condition by clicking on .



Advanced Search Example:

To search for McGill documents that contain either word **IT** or **Services** and uses the **Name** field as a filter:

1. Navigate to the **Advanced Search** dialogue box as described above.
2. From the **Criteria** tab, click on the  button to the right of the **Types** box.
3. The **Types** dialogue box opens.
4. Select **Document** from the list on the left and click on the  arrow button to move it to the right.
5. Click **OK**.



6. Add your first condition. Add other condition(s) by clicking on the **+** button. In the example below, we are using the properties called **Keywords** and **Created** date. Don't forget to use the logical parameters '**and/or**' if you are using more than one condition. Add the **Full text** field to search for certain words.

Advanced Search

Search name:

Criteria Location(s) Columns Facets

Types: McGill Document

Property	Condition	Value
Keywords	contains	customer
and		
Created	>	Jan 1, 2016

Full text: Containing all words IT Services

Options

All versions: ☐

Save as Save Run Cancel

7. If you want to search in all your spaces, go to step 8. If you only want to search in specific spaces:
 - a. Click the **Location(s)** tab.
 - b. Click **...** to the right of the Folders field, to select the space.
 - c. From the **Repository Assistance** window, click the arrow next to **Spaces**.
 - d. Select the space and click **OK**. You may add more spaces by repeating steps b and c.

Advanced Search

Search name:

Criteria Location(s) Columns Facets

Include sub-folders: ☒

Folders:

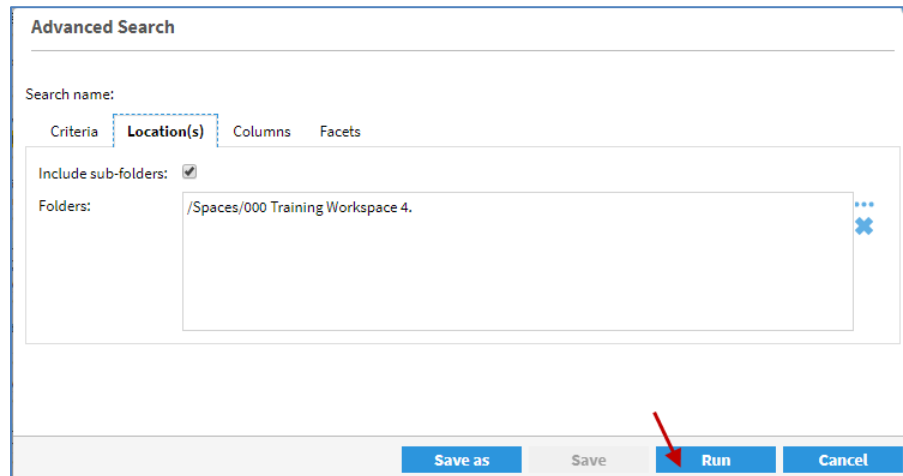
Save as Save Run Cancel

Repository Assistance

- Reports
- Resources
- Spaces
 - 000 Training Space1
 - 000 Training Workspace 4
 - Files
 - SD Test
- 000 TrainingSpace2
- 000001Manage
- 0001TestUpdatePermissions
- 01FolderD2Test0207

OK Cancel

8. Click the **Run** button from the **Advanced Search** window. Your results will be displayed in **Documents** widget. The next section explains this.
 - a. To save this search template, click **Save as** and provide a Search name.
 - b. Click **Save**.

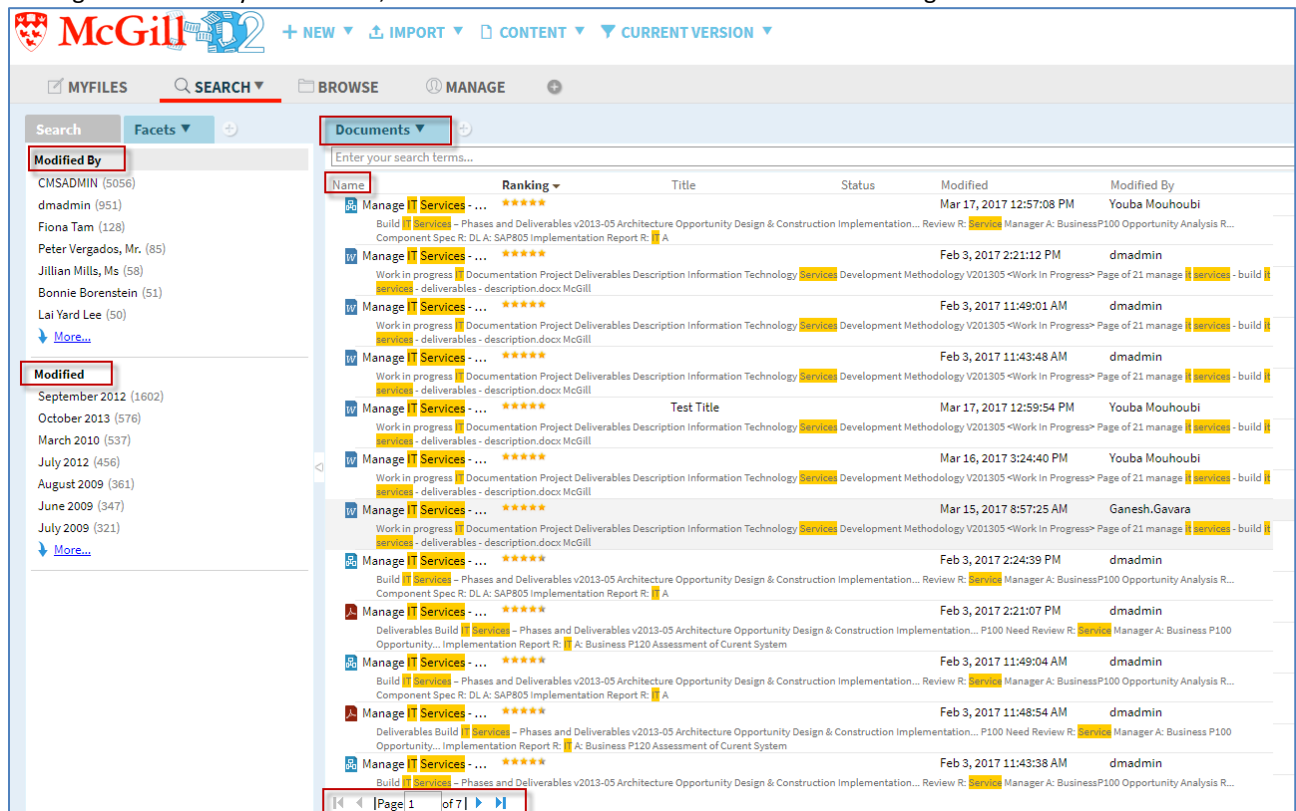


The image shows the 'Advanced Search' dialog box. It has tabs for 'Criteria', 'Location(s)', 'Columns', and 'Facets'. The 'Location(s)' tab is selected. Under 'Include sub-folders:', there is a checked checkbox. The 'Folders:' field contains the text '/Spaces/000 Training Workspace 4.'. At the bottom, there are four buttons: 'Save as', 'Save', 'Run' (highlighted with a red arrow), and 'Cancel'.

5.3 Change the Search result presentation

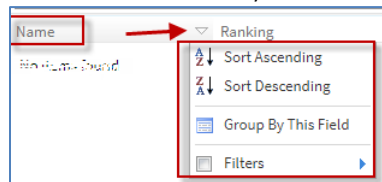
The results of a search display in the **Documents** widget. Note that when a folder has more than 1000 files, the first 1000 files will be listed and a filter automatically displays. For more information, see the [Documents widget section](#).

The results are in a table; use the fields (e.g. Name, Title, Modified date, Modified By) to easily find what you are looking for. To modify these fields, click the down-arrow next to the **Documents** widget and click **Columns**.



The image shows the McGill MyFiles interface. The top navigation bar includes 'MYFILES', 'SEARCH', 'BROWSE', and 'MANAGE'. The 'SEARCH' tab is active. On the left, there are filters for 'Modified By' and 'Modified'. The main area displays a table of search results under the 'Documents' widget. The table has columns: Name, Ranking, Title, Status, Modified, and Modified By. The results are sorted by 'Modified' date in descending order. The first result is 'Build Services - Phases and Deliverables v2013-05 Architecture Opportunity Design & Construction Implementation... Review R: Services Manager A: BusinessP100 Opportunity Analysis R...'. The table is paginated, showing 'Page 1 of 7'.

You can order the results by these fields (e.g. Name, Modified date, Modified By). Click on the right-arrow next to the field (e.g. Name in screenshot below) and select your preference (e.g. Sort Ascending, Sort Descending).



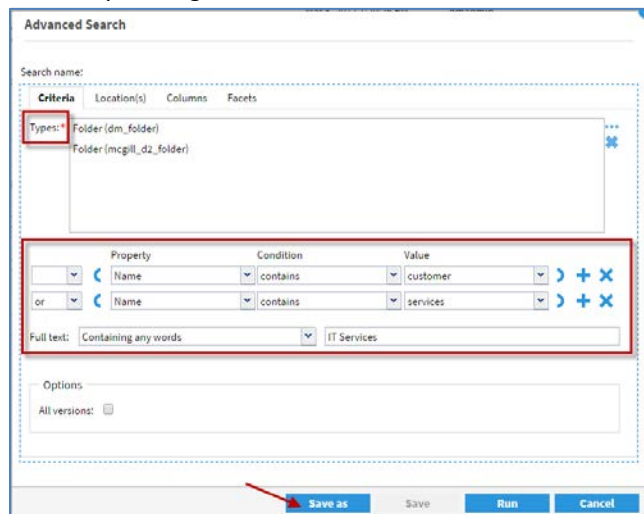
You can navigate to other result pages by using the scrollbar in the footer of the window.



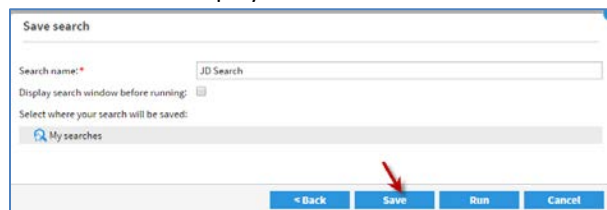
5.4 Save the Advanced Search

In many cases, we need to perform the same search frequently. In this case we can save the search.

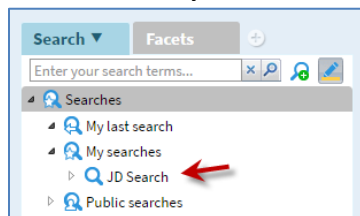
1. Follow the steps in the [Advanced Search](#) section 5.2 above.
2. Save this search by clicking on the **Save as** button.



3. The **Save search** window displays. Provide a **Search name** and click **Save**.



4. This search will now be saved in **My searches** in the **Search** widget. Double-click on it to run the search.



5. To modify the search, right click on the search and select **Search criteria**.

6. Coordinator group – administer spaces

The space coordinator can add users/groups to their space and assign a group to them (coordinator, contributor or consumer). The coordinator is also responsible for assigning permissions to a group (e.g. Read, Read & Comment, Versions, Edit, Delete, Exclude). IT Support is responsible for creating the spaces.

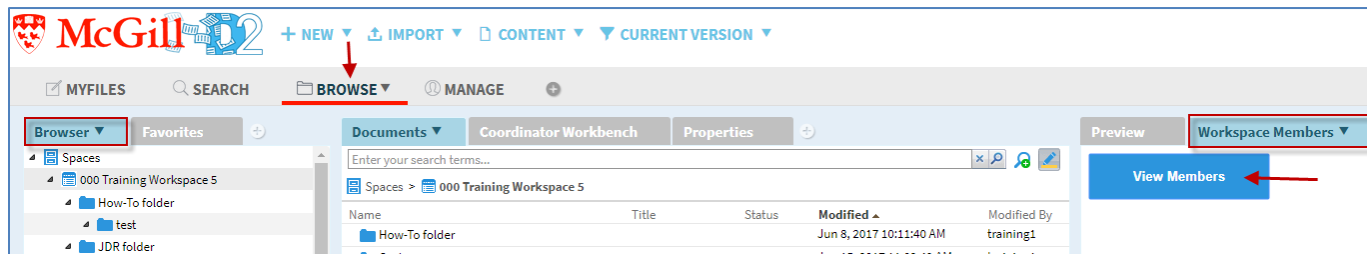
6.1 View space members

This widget is used to view the users within each group for the space or the folder. It is available in the **Browser workspace** by default.

Click the desired space, or the desired folder within a space.

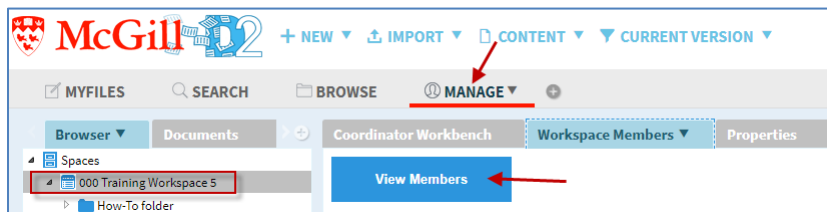
Method 1 (available to coordinator, contributor and consumer groups)

1. Click **BROWSE** Workspace
2. Click the **Browser** widget
3. Click the **Workspace Members** widget
4. Click **View Members**.



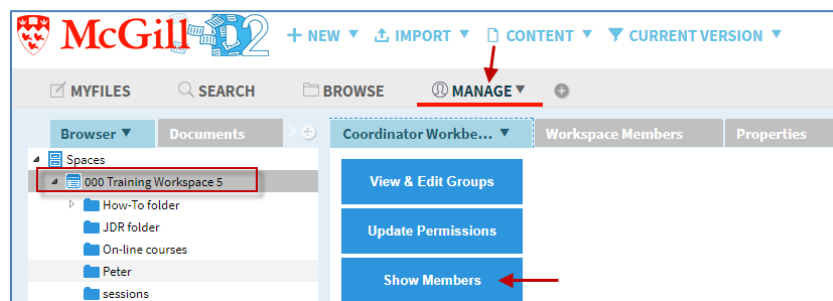
Method 2 (for coordinators only):

1. Click **MANAGE** Workspace
2. Click the **Workspace Members** widget
3. Click **View Members**



Method 3 (for coordinators only):

1. Click **MANAGE** workspace
2. Click the **Coordinator Workbench** widget
3. Click **Show Members**



For the three methods described above, the member name, group and the current permission displays:

Current Permissions		
Member	Group	Permission
support1	trainingworkspace5_coordinators	Delete
training9	trainingworkspace5_coordinators	Delete
training8	trainingworkspace5_coordinators	Delete
training7	trainingworkspace5_coordinators	Delete
training6	trainingworkspace5_coordinators	Delete
training4	trainingworkspace5_coordinators	Delete
training3	trainingworkspace5_coordinators	Delete
training2	trainingworkspace5_coordinators	Delete
training5	trainingworkspace5_coordinators	Delete
training1	trainingworkspace5_coordinators	Delete
Mercy Isaac	trainingworkspace5_contributors	Edit
Bounmy Thammavong	trainingworkspace5_contributors	Edit
Joanne De Rose, Ms.	trainingworkspace5_contributors	Edit
Peter Vergados, Mr.	trainingworkspace5_consumers	Read & Comment

6.2 View and edit space properties

A space coordinator can view all space properties, but can only change the name of the space.

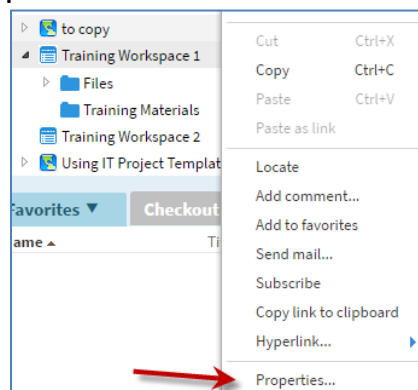
Note

The space coordinator cannot change the following fields; these are grayed out:

- Space Short Name
- Public Space
- Source Template

*You can use the **Properties** widget to view the space keywords. Click **Edit** to add/update keywords.*

1. Right click on the space name.
2. Click **Properties...**



3. The Properties of the space window displays.
 - a. **Name of the Space:** displays the name of the space. This may be updated.
 - b. **Title of this Space:** displays the title. This may be updated.
 - c. **Subject:** displays the subject. This may be updated.
 - d. **Space Short Name:** displays the unique short name. This cannot be updated.
 - e. **Public Space:** checked if the space is a public one. This is set by IT Support when they create the space.
 - f. **Source Template:** displays the template used to create the space. This cannot be updated.

- View the fields. To make changes to the first three fields, click **OK**. If you change your mind and you don't want to update, click **Cancel**.

Properties of 000 My Training Space

Name of the Space: * 000 My Training Space

Title of this Space: 000 My Training Space

Subject: training space

Space Short Name(Used to name groups): Mytrainspace

Public Space: ☐

Source Template: Standard Template

OK Cancel

6.3 Group Administration

Use the following steps to add or remove users or AD groups to/from your space.

6.3.1 Add user or group to space

IT Support staff is responsible for creating a space. At first, they are the space coordinator by default. They assign user(s) to the coordinator group. Once they do this, they send an email to the coordinator(s) informing them that the space is created. They must then remove themselves as coordinator of the space.

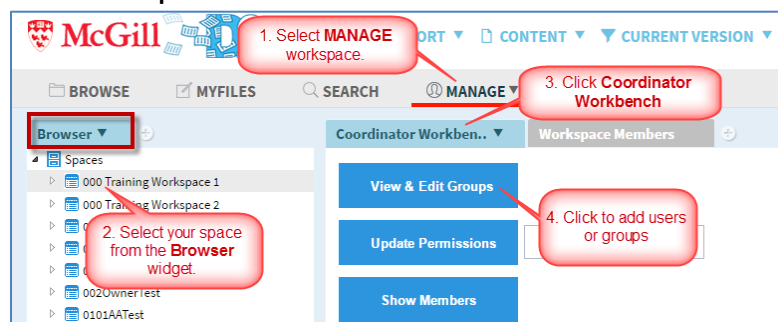
This allows the coordinator to view and update the users or groups (AD groups recommended) for their space for the coordinator, contributor and consumer groups.

Prerequisites

- Make sure that you are logged in D2 as a coordinator as this privilege is needed to be able to do this.

Steps

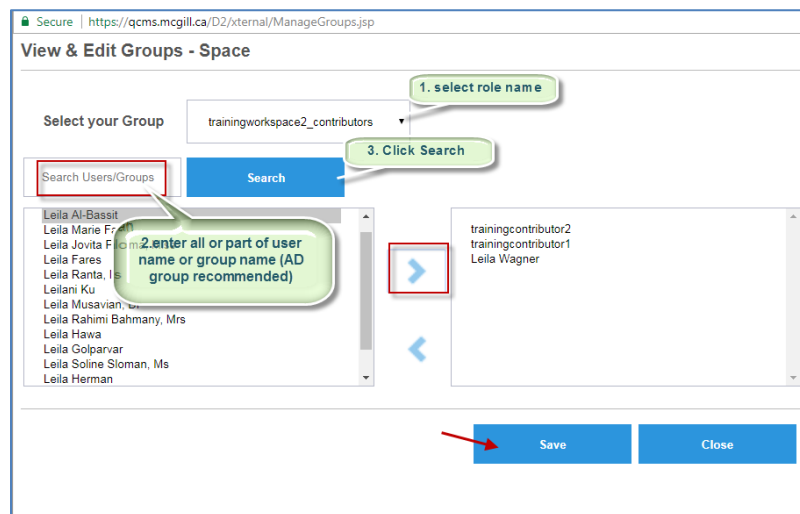
- Click **MANAGE** Workspace
- Use the **Browser** widget to locate the space and click on it.
- Click the **Coordinator Workbench** widget
- Click **View & Edit Groups**



- You will see the 3 groups from the **Select your Group** drop down list. Select the group to add the users or groups to by clicking on the drop-down arrow:

- <SpaceShortName_coordinators> ← Coordinators
- <SpaceShortName_consumers> ← Consumers
- <SpaceShortName_contributors> ← Contributors

6. Enter all or part of the user or group name in the **Search Users/Groups** field.
7. Click on **Search**



8. A list of users/groups will appear below the search, on the left-hand side. Select the user/group to be added to the desired group (contributor in this example).
9. Click on the ➤ button to add user/group to the right side.
10. Click the **Save** button
11. Click **Close** to close the **View & Edit Groups – Space** window.

6.3.2 Remove user or group from space

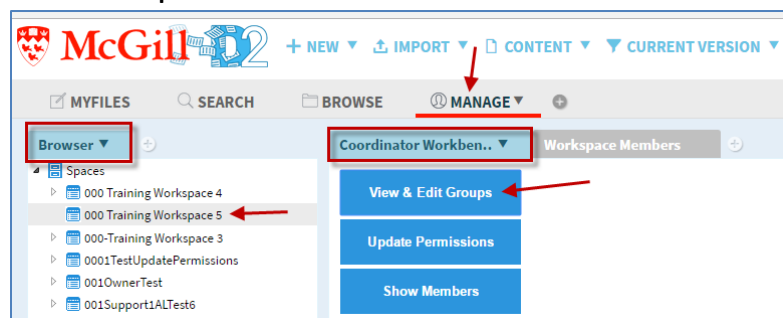
This allows the coordinator to remove the users or groups for their space for the coordinator, contributor and consumer groups.

Prerequisites


1. Make sure you are logged in D2 as a coordinator as this privilege is needed to be able to do this.

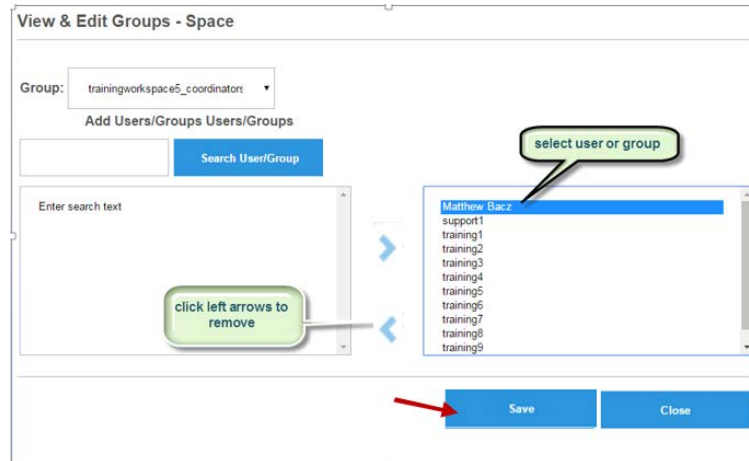
Steps

1. Click **MANAGE** Workspace
2. Use the **Browser** widget to locate the space and click on it
3. Click the **Coordinator Workbench** widget
4. Click **View & Edit Groups**



5. You will see the 3 groups from the **Select your Group** drop down list. Select the group to remove the user or group from, by clicking on the drop-down arrow:
 - a. <SpaceShortName_coordinators> ← Coordinators
 - b. <SpaceShortName_consumers> ← Consumers
 - c. <SpaceShortName_contributors> ← Contributors

6. Select the user or group you would like to remove from the list on the right.
7. Click on the  button to remove user or group from the right side.
8. Click **Save**.
9. Click **Close** to close the **View & Edit Groups – Space** window.



6.3.3 Update user or group permissions

You can set permissions at the folder and file level. Note that it is not possible to set permissions at the space level. If one selects a space, clicking on “**Update Permissions**” will result in the following message:

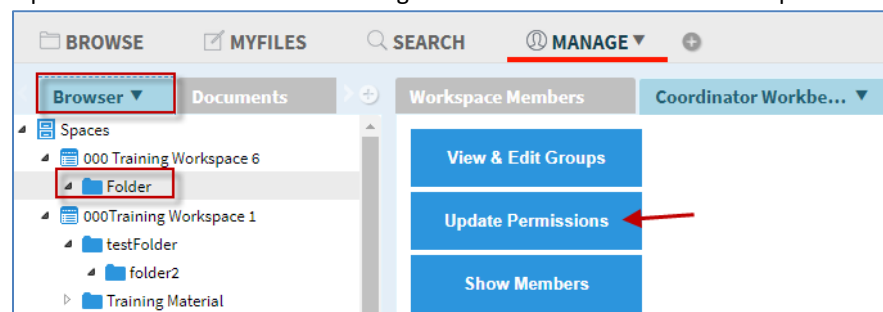
Update Permissions - Folder 000 D2 Training and Courseware
 Cannot edit workspace permissions on space level, please select a folder!

Prerequisites

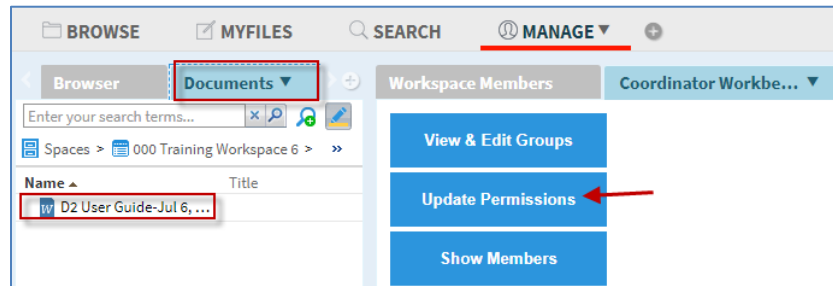
1. Make sure you are logged in D2 as a coordinator, as this privilege is needed to be able to do this.

Steps for permissions

1. Click **MANAGE** workspace
2. Click the **Coordinator Workbench** widget
3. For Folder permissions: use the **Browser** widget to locate the folder within the space.



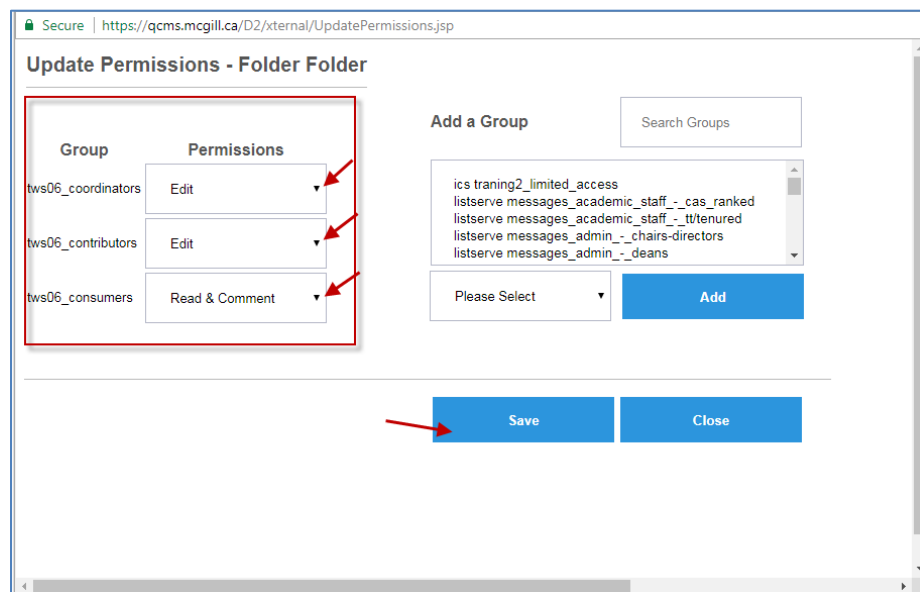
For File permissions: use the **Documents** widget to locate the file within the space.



4. Click **Update Permissions**.
5. Modify the permission for the different groups (coordinators, contributors, consumers) by clicking on the down arrow.

Permission	Means...
None	Members will not have access to this folder or file (i.e. will not see it).
Read	Members can access the folder and view (read) the files within the folder, or view (read) the file.
Read and Comment	In addition to read, members can comment as well.
Version	Members can edit and create a new version of a file, but cannot delete or overwrite a version.
Edit	Members can edit the file and save it as a new version. Can also read the file.
Delete	Members will be able to delete files from the folder (as well as read and edit), or can delete the file.
Exclude	Removes the group from the list of permissions.

6. Click **Save**. The permissions display. Click **Close**.



6.4 Cascading permissions

Space coordinators are responsible to set permissions at the folder level. This is explained in [Section 6.3](#) above.

After permissions are updated for a folder, any sub-folder and file created in this folder inherit its permissions, except if the permission of a given sub-folder or file was manually updated.

For example, the space coordinator:

- Creates a main folder called **Communication** and sets the **Contributor** permission = Edit
- 3 subfolders are created: **Email**, **KB**, **FAQ** (*the Contributor permission = Edit for all 3 subfolders*)
- For the **Email** folder, the **Contributor** permission is changed to Read (*this is manually updated*)
- When the permission of the **Communication** folder is updated, this updates the permission of the subfolders **KB** and **FAQ** only. The permission of the subfolder **Email** is not updated because this was manually updated.

6.5 Add a new D2 group and assign a permission

You may need a new D2 group besides the 3 default ones: coordinator, contributor, and consumer. Only IT Support can create a D2 group. The space coordinator will request the new D2 group from the [IT Service Desk](#). IT Support will create the D2 group and set up the space coordinator as the **Administration Group**. Once the group is created, the coordinator will then be able to edit the group (add/remove users, groups and permissions).

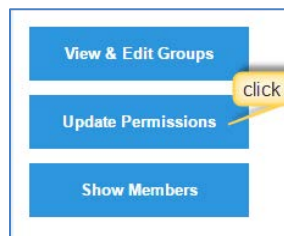
Note

- When a new D2 group is created, other coordinators in other spaces can use this D2 group in their space(s). However, be careful when using D2 groups managed by other coordinators. Group administrators of this D2 group can add/remove users and groups. The same applies when using AD groups that are managed by others.
- Only the group selected as **Administration Group** can add/remove users or groups from a D2 group. If at the time of creating a D2 group, the administration group is not selected, then only IT Support can manage it.
- Contact IT Support (who will contact ECM system administrators) to:
 - Delete a newly created group
 - Assign a different Administration Group to your D2 group

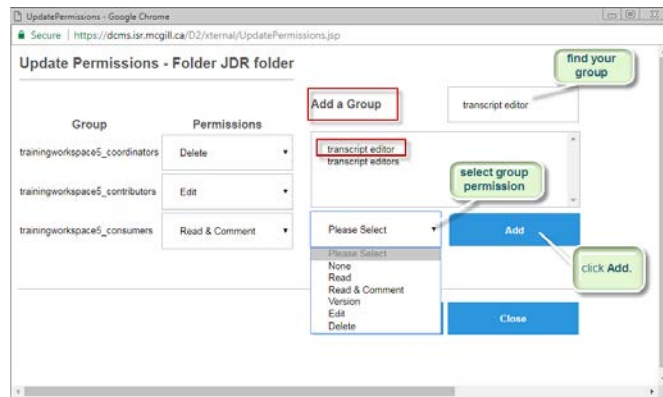
6.5.1 Assign permission to the new D2 group

The coordinator can only do this after IT Support creates the D2 group (see section above). Then, the coordinator can assign the permission to this new group.

1. Click **MANAGE** workspace.
2. Use the **Browser** widget to locate the space and the folder.
3. Click **Coordinator Workbench**
4. Click **Update Permissions**

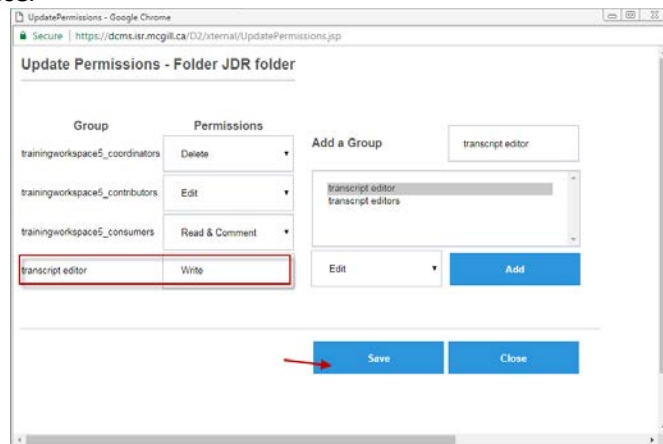


5. In the **Add a Group** field, type the name of the group added by IT Support.
6. Press Enter key.
7. The group(s) will display in the window. Select the correct group.
8. Assign a permission to the group (e.g. Read, Edit, Delete, etc.) by clicking on the down arrow.
9. Click **Add**. The new group will be added to the groups on the left.



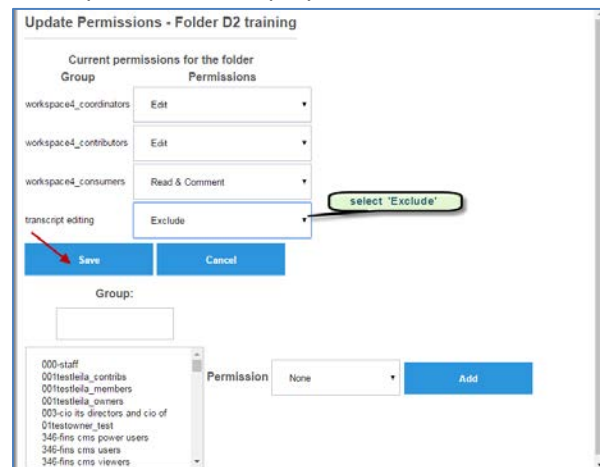
10. Click **Save**.

11. Click **Close**.



6.5.2 Remove permission from a D2 group

1. Click **MANAGE** workspace.
2. Use the **Browser** widget to locate the space and the folder.
3. From the **Coordinator Workbench** select **Update Permissions**.
4. Select the D2 group. In the diagram below, this group is called **transcript editing**.
5. From the drop down list of permissions, select **Exclude**
6. Click **Save**. The permissions display. Click **Close**.



Appendix 1 – First-time login to D2

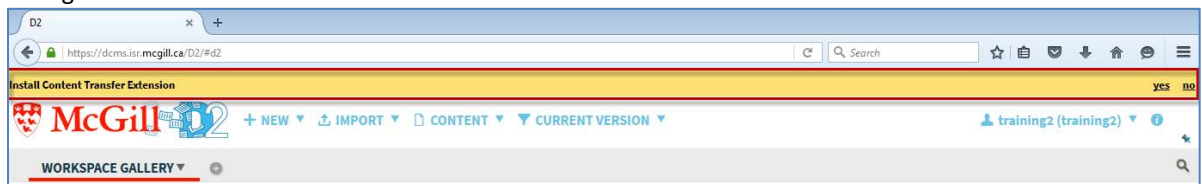
When you log in to D2 for the first time, you will be prompted to install the **Content Transfer Extension**, which allows faster check-out and check-in of files using D2. The required steps for the CTF installation differ depending on whether you have a **SLA (Service Level Agreement with IT Services)** and your administrative rights to the computer. They also depend on the browser that you are using. The different steps are described below:

Appendix 1.1 - CTF installation on personal or non-SLA computers

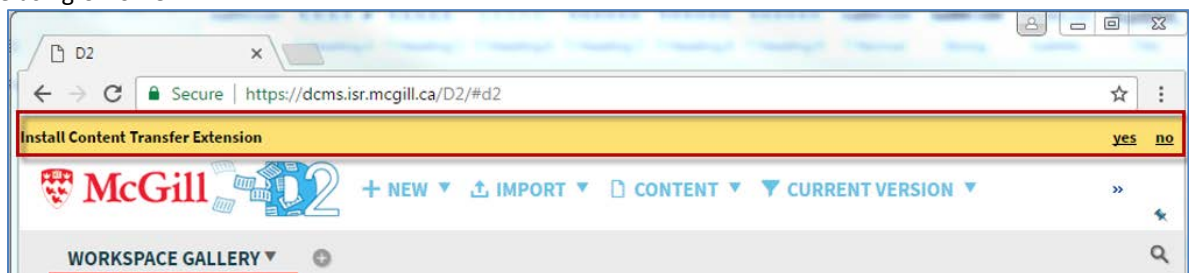
For Firefox, Chrome, and Internet Explorer:

1. Select ‘**yes**’ or ‘**no**’ when prompted to Install Content Transfer Extension”. The screenshots for each browser and the prompt are displayed below.
 - a. If you select “**no**”, the plugin will not be installed, but the prompt will reappear the next time you login to D2.
 - b. If you select “**yes**”, the plugin will be installed.

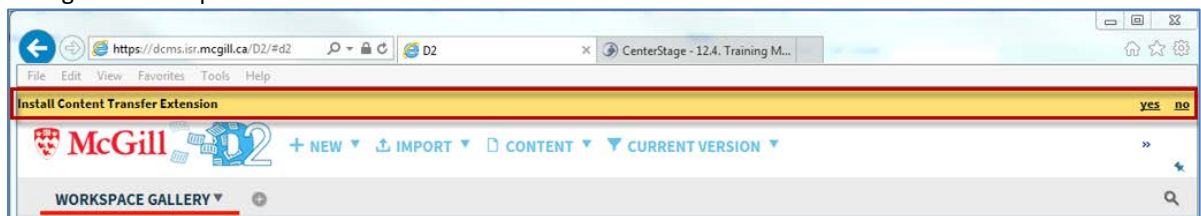
If you are using Firefox:



If you are using Chrome:



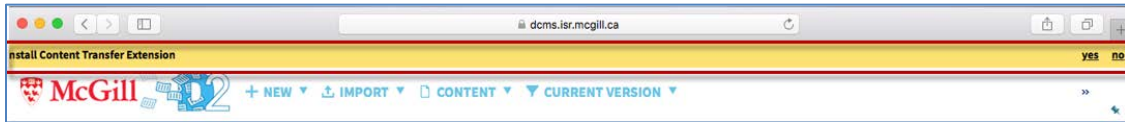
If you are using Internet Explorer:



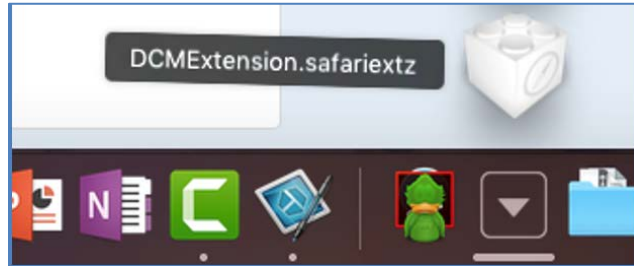
For Safari on a Mac OS computer:

1. Select ‘**yes**’ or ‘**no**’ when prompted to Install Content Transfer Extension”.

- a. If you select “no”, the plugin will not be installed; the prompt reappears the next time you login to D2.
- b. If you select “yes”, the plugin will be downloaded to your computer. Then perform the steps below:



1. Click on the **DCMExtension.safariextz** file in your Downloads folder.



2. Click on “Trust” in the window that comes up:

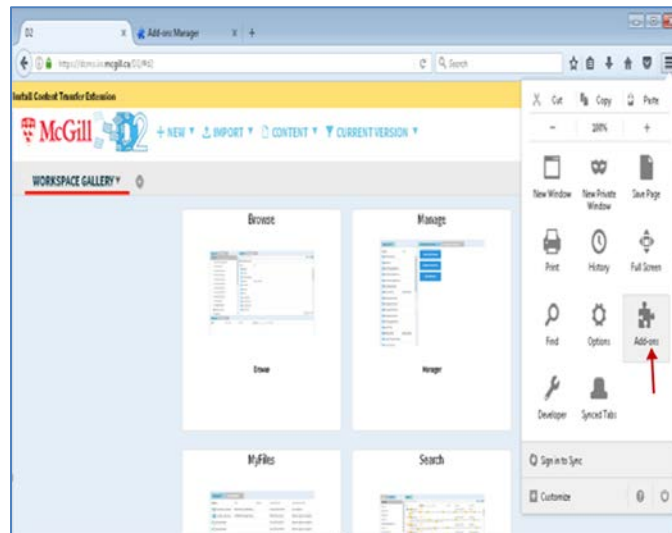


Appendix 1.2 - CTF installation on computers covered under SLA and plugin is pushed by IT Services

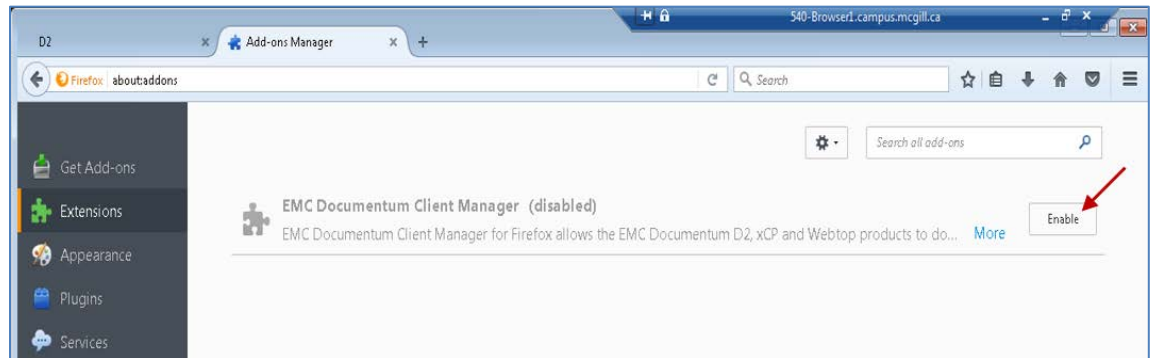
For Firefox:

The plug-in is not enabled by default, so you will need to manually enable it. To do this:

1. Go to **Add-ons**



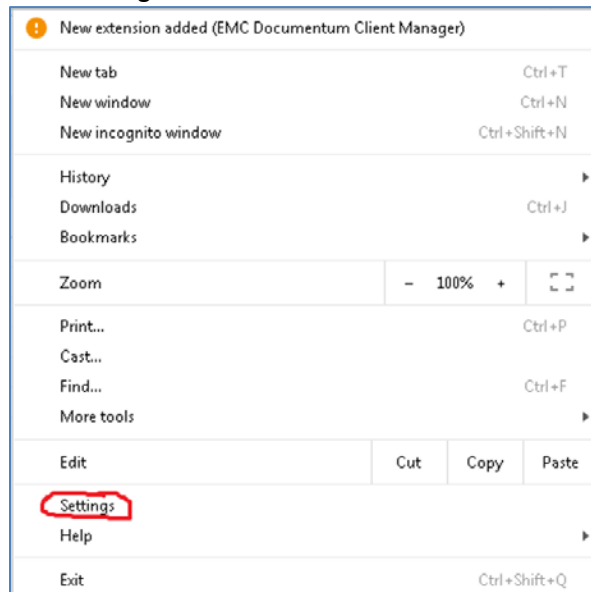
2. Click **Enable** to enable the EMC Documentum Client Manager. Otherwise, you will get a prompt to install the Content Transfer Extension; if you select **'yes'**, it will enable the plugin.



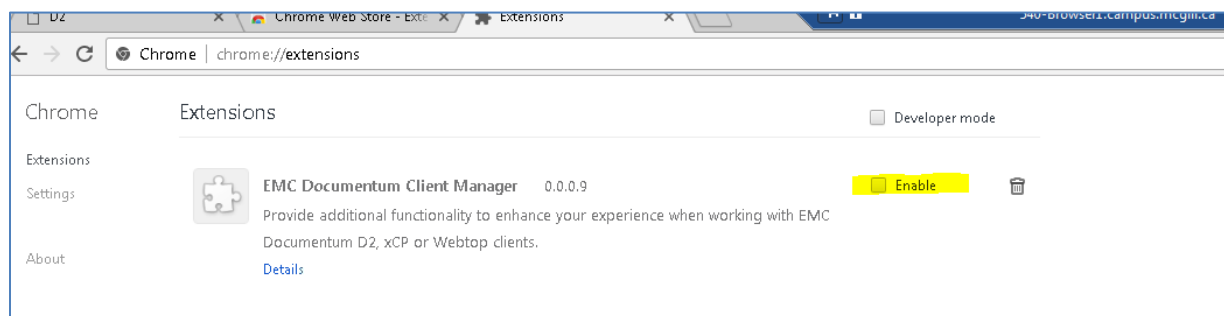
For Chrome:

The plug-in is not enabled by default, so you will need to manually enable it. To do this:

1. Go to **Settings**

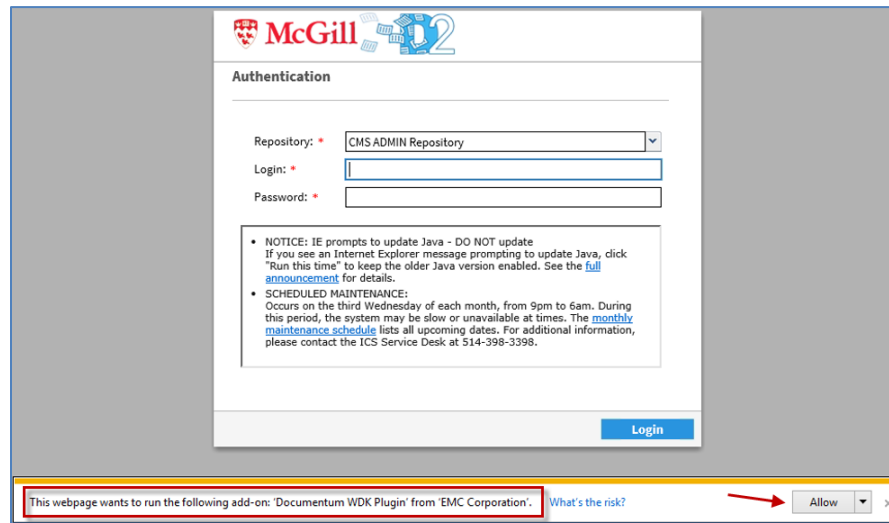


2. Click **Enable** to enable the EMC Documentum Client Manager. Otherwise, you will get a prompt to install the Content Transfer Extension; if you select **'yes'**, it will enable the plugin.

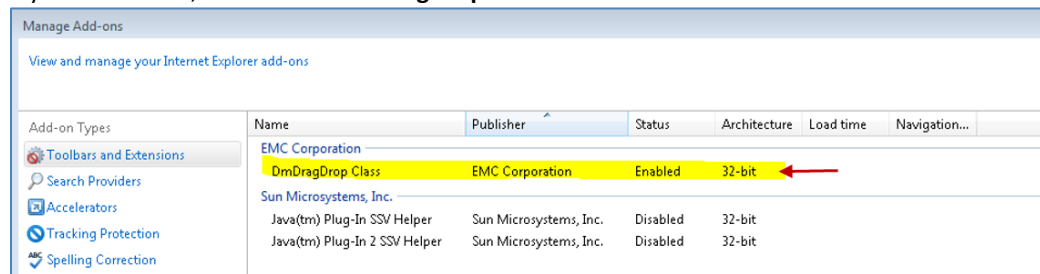


For Internet Explorer:

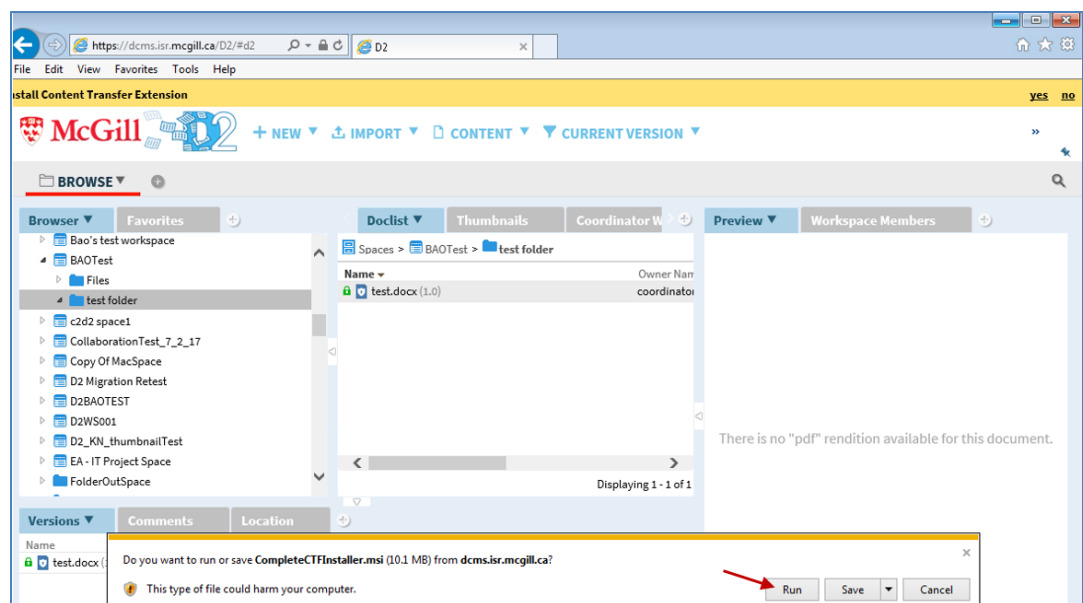
1. From the D2 login page, you will be prompted to allow the plugin to run. Click **Allow**.



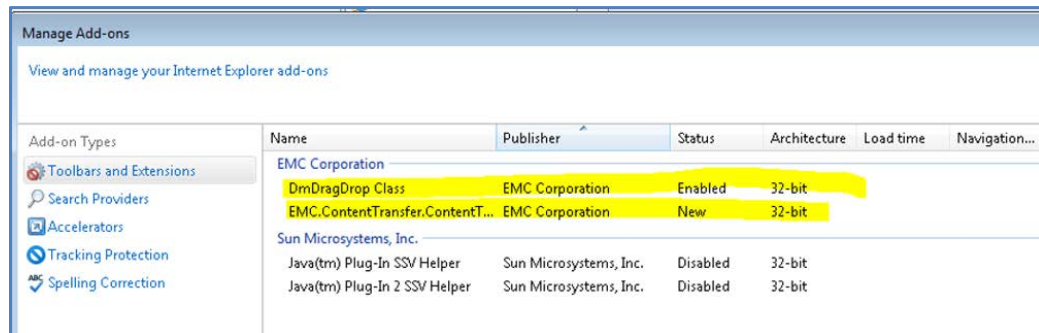
2. If you click **Allow**, it will install **DmDragDrop Class** as shown below:



3. Once you have logged in to D2, you will be prompted to install the Content Transfer Extension. If you click on **Yes** and then **Run** the setup file, it will install the EMC.ContentTransfer... plugin.



- Both plugins are required to drag and drop files and perform a quick check-in and check-out of files.



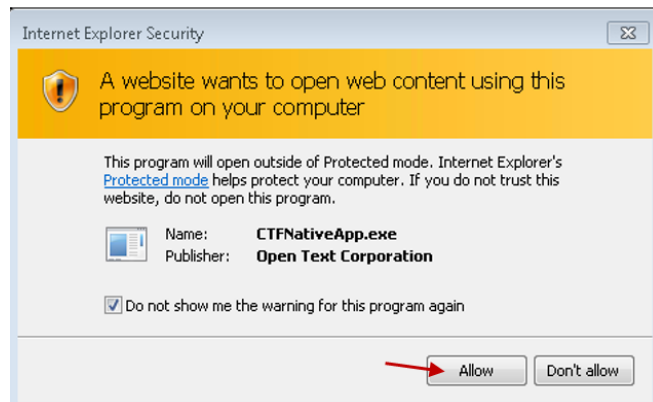
Appendix 1.3 - CTF installation on computers covered under SLA and user does not have administrative rights

The steps for this are different, depending on whether the plug-in is pushed to the computer or not. It also depends on the browser you are using.

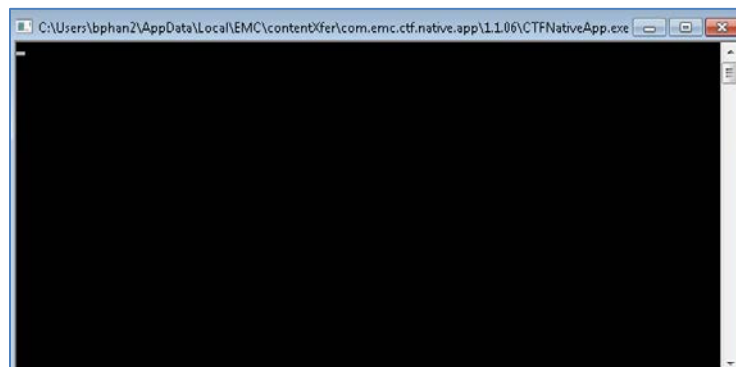
a. If the plug-in is pushed to the computer

For Internet Explorer:

- Upon logging in to D2, the user will be prompted to allow the CTF Native App. However, regardless of which option you select (**Allow** or **Don't allow**), the prompt will keep on displaying.

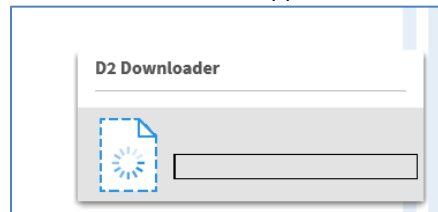


- If you check the option "Do not show me the warning for this program again", then the following screen will keep displaying. This means that the plug-in does not work.



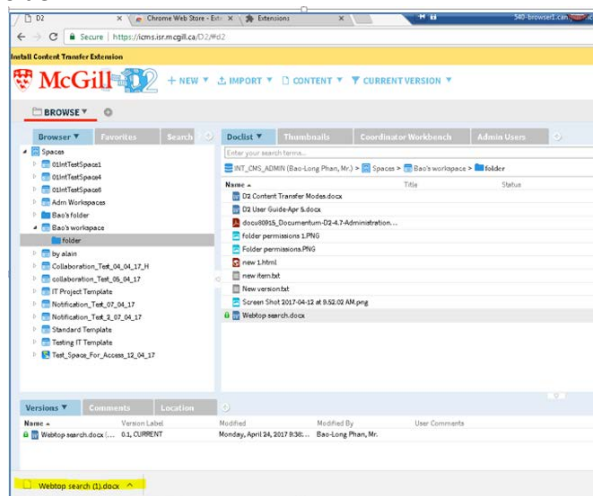
For Firefox:

The plug-in does not work, even after it has been enabled in Firefox. When the user tries to edit a document, the downloader will appear and then freeze:



For Chrome:

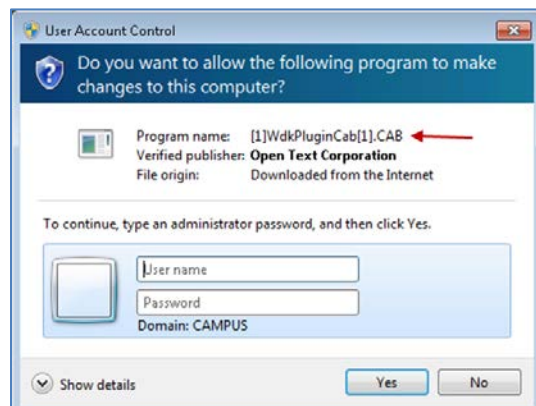
Chrome acts as if the plug-in is not enabled (even though it is) and simply downloads the file to the user's default folder.



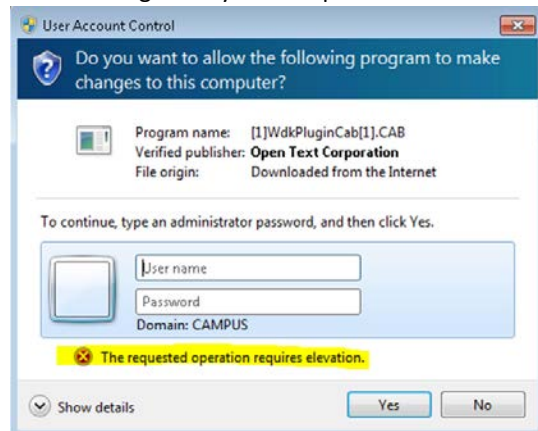
b. If the plug-in is not pushed to the computer

For Internet Explorer:

1. Upon opening the D2 login page, you will be prompted to install **WdkPluginCab.CAB**. If you click on "Install", you will be asked to enter your administrator credentials.

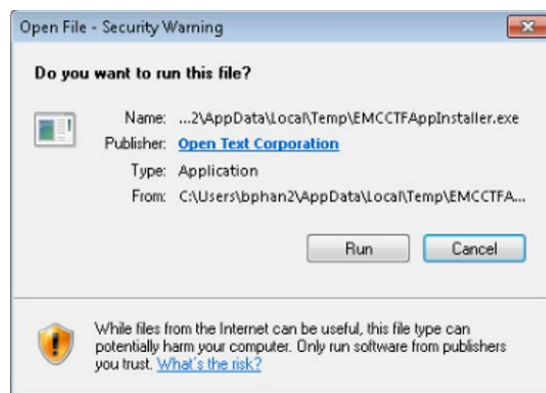


2. After you enter your McGill Username and Password, the following displays since you do not have administrative rights to your computer:

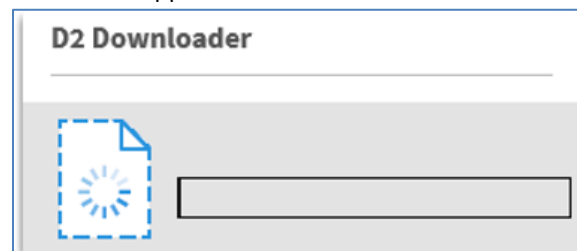


For Firefox:

1. You will be prompted to install the plug-in. If you click on "Run", the plug-in will be installed.



2. However, it does not work when you try using it later. When the user tries to edit a document, the downloader will appear and then freeze:



For Google Chrome:

Similar to Firefox, Chrome will allow the user to install the plug-in. However, it will act as if the plug-in is not enabled (even though it is) and simply downloads the file to the user's default folder.

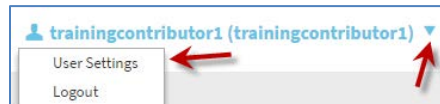
Appendix 2 – Content Transfer Modes

This appendix explains the differences between the 3 Content Transfer Modes in D2, and how they affect certain tasks in D2. There are 3 Content Transfer Modes in D2:

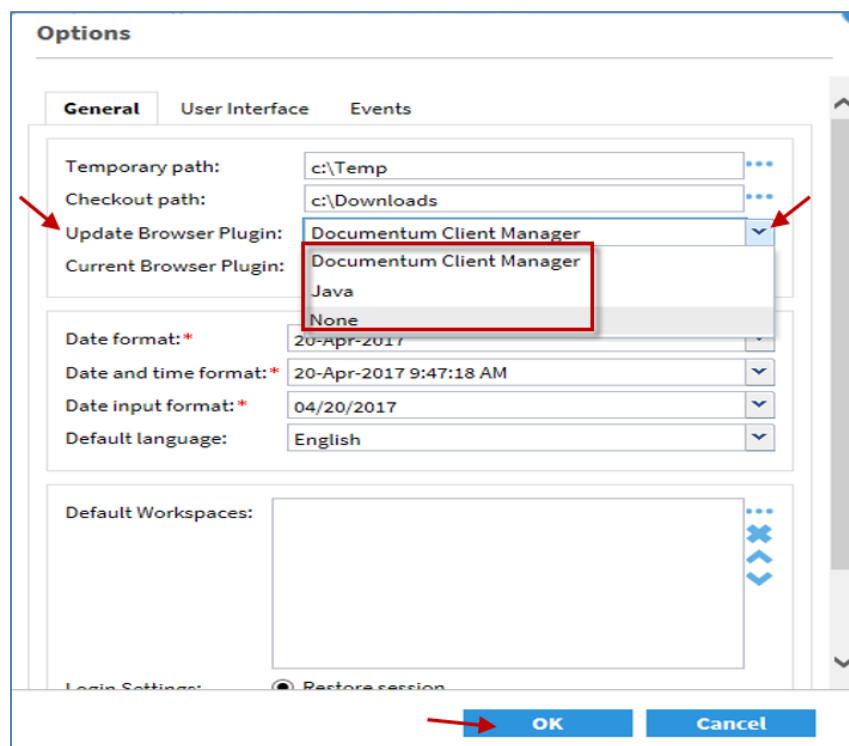
- **Documentum Client Manager**
- **Java**
- **None** (Thin Client).

To switch between the different modes:

1. Click on the down arrow next to your name.
2. Click on **User Settings**.



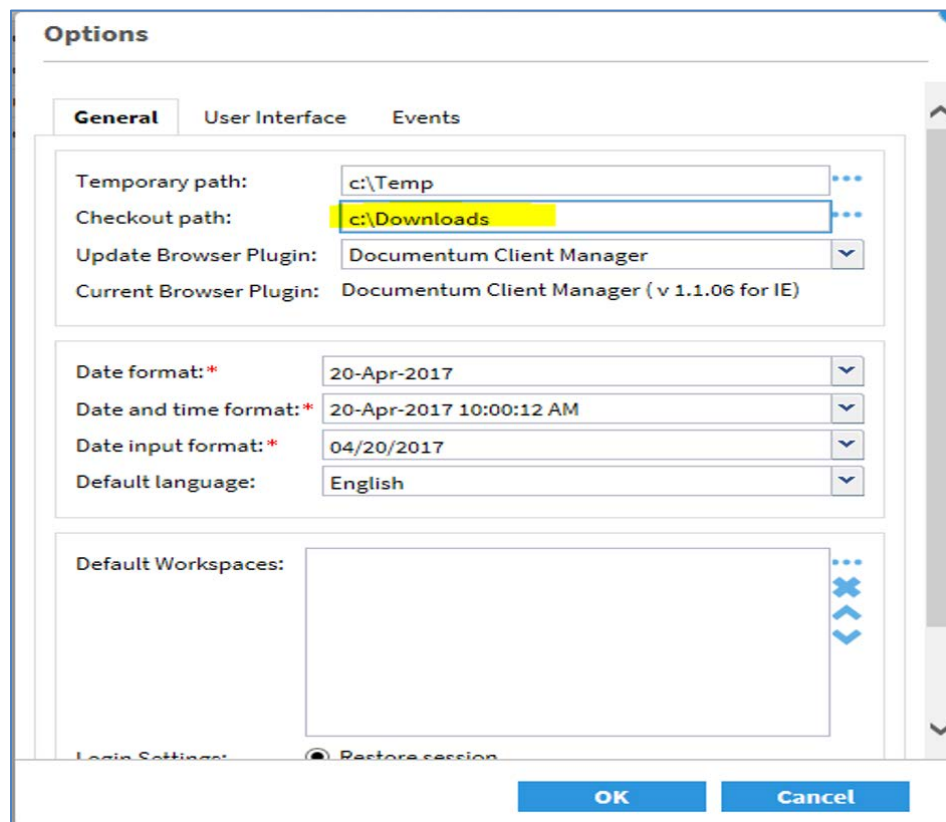
3. The **Options** window displays. From the **General** tab, select the appropriate option from the drop-down menu in the **Update Browser Plugin** field.
4. Once you select or enter the desired mode, click **OK** to save the changes.



1. Edit/Check-out and Check-in a file

a. **Documentum Client Manager and Java Applet:**

D2 seamlessly downloads the file to a directory set by the user, and opens it for editing. If the **Checkout path** is **c:\Downloads** (as shown below), the file will be downloaded here. However, you can change it to a different location by clicking on the “...” and browse for the desired folder. Upon check-in, D2 looks in the directory folder of the **Checkout path** field and uploads the file without prompting the user to find it.



b. None (Thin Client):

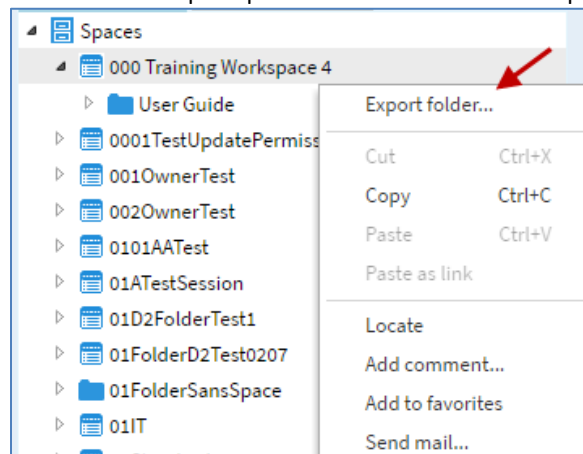
D2 uses standard browser file download, so a user is typically prompted to open or save the file. The exact behavior depends on the browser. During check-in, the user is prompted to locate the file before the upload.

2. Export folder

a. Documentum Client Manager and Java Applet:

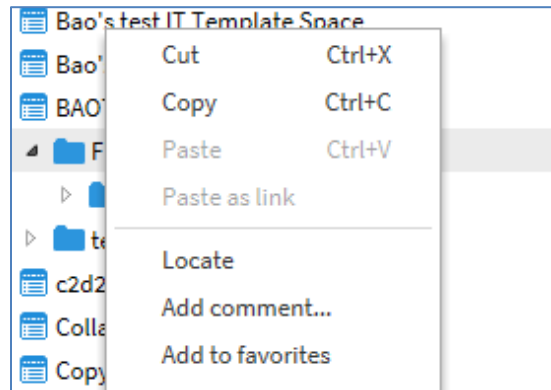
To export a folder and all of its files from D2 to your computer:

1. Right-click on the folder and select **Export Folder**
2. You will then be prompted to select a location to export the folder to.



b. **None (Thin Client)**

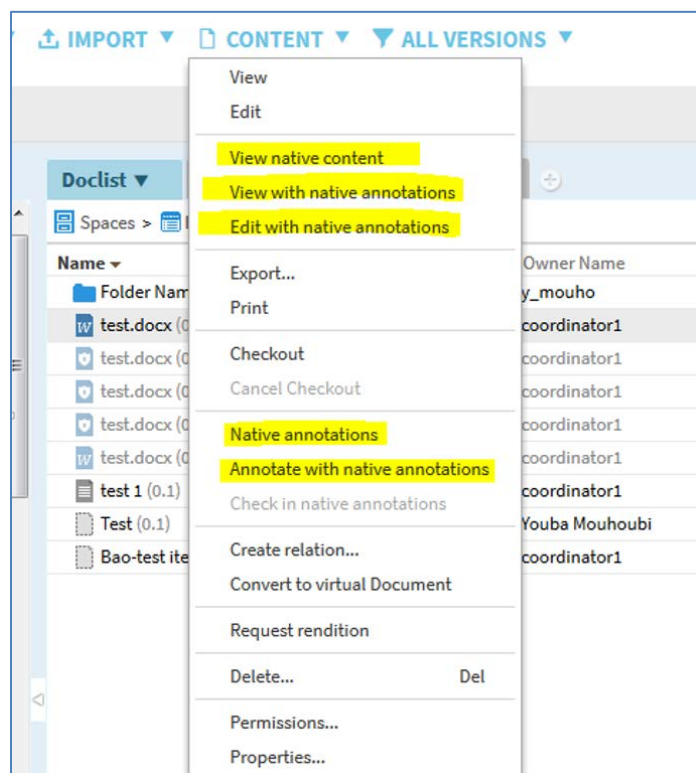
This function is not available in the Thin Client. When you right-click on the folder, that function is not there.


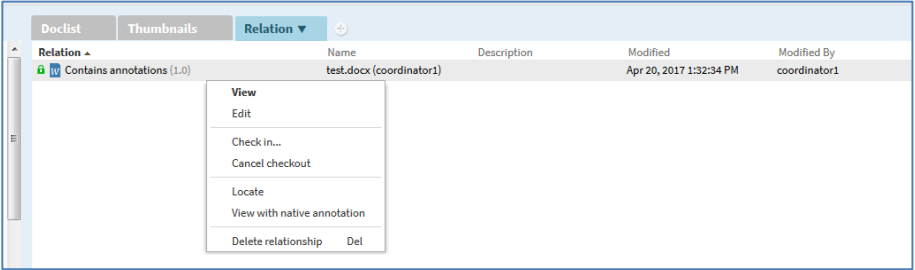


3. Native Annotations

a. **Documentum Client Manager and Java Applet:**

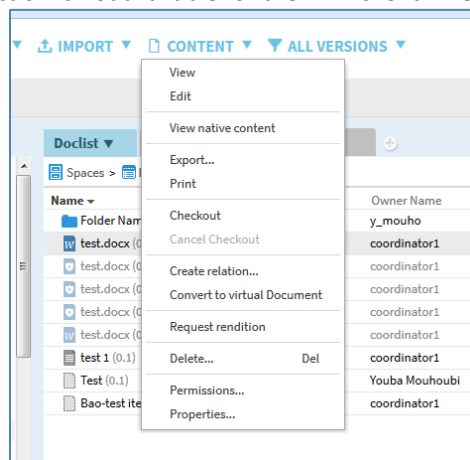
D2 merges Microsoft Word document annotations (comments and track changes) from multiple users and manages them in the repository as related objects (**Relations** widget). Different options for native annotations are available from the **Content** menu. These are explained in the table below the screenshot.



Option	Means...
View native content	view the file without the annotations
View with native annotations	view the file with the annotations
Edit with native annotations	similar to the previous option, but the file will be checked out for editing and will need to be checked back in.
Native annotations	view the annotations only without the actual content of the document. 
Annotate with native annotations	similar to the previous option, except the file containing the annotations will be checked out (from the Relation widget) and will need to be checked back in. 

b. None (Thin Client):

This function is not available for the Thin Client. The options are not available from the **Content** menu.

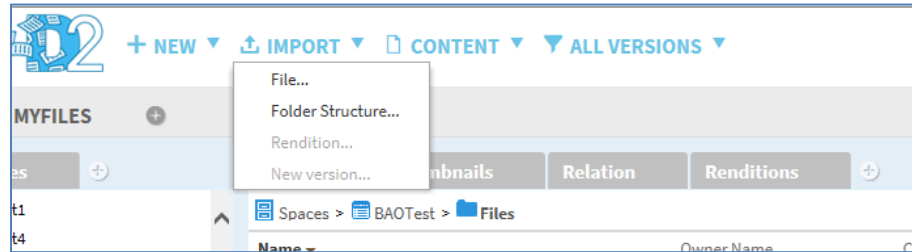


4. Import folder

a. Documentum Client Manage and Java Applet:

To import a folder and all of its files from your computer to D2:

1. Click **Import > Folder Structure**
2. Select the folder from your computer.



b. None (Thin Client):

This feature is not available for the Thin Client.

5. Drag file(s) from your computer to D2

For all three modes, you can drag and drop files from your computer to D2.

6. Drag file(s) from D2 to your computer

For all three modes, you can drag and drop files from D2 to your computer. *Note: this will only work on Internet Explorer (with ActiveX enabled).* To do this:

1. Hold down **Ctrl + Shift**
2. Drag the file with your mouse.

7. Drag file from MS Outlook to D2

For all three modes, you can drag a message, a message with attachment(s), or just the attachment(s) from MS Outlook to D2.

8. Comparing 2 MS Word documents

a) Documentum Client Manager and Java Applet:

This feature is only available on a Microsoft Windows system. You must have read permissions for both documents. Follow these steps:

1. In a list widget (such as Documents), select two MS Word documents
2. Click on **Content > Compare**. A merged Word document will open with the differences between your selected documents highlighted.

b) None (Thin Client):

This feature is not available for the Thin Client.