# Documentum Webtop User Processes
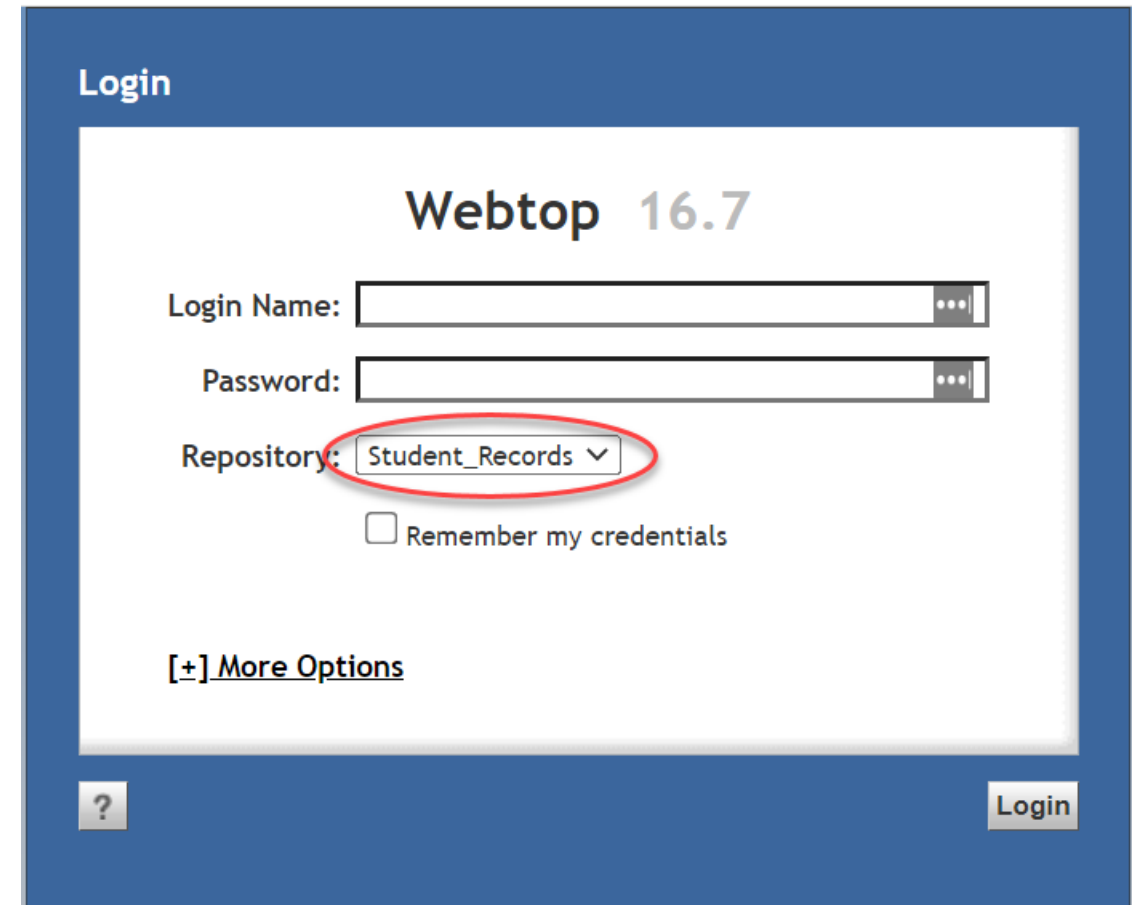
Initial Setup and Operation

# What is Documentum?

- The Documentum system is an electronic document filing cabinet

- The user app to access documents is called Webtop

- Users log into the Webtop app using their UTHealth network userid and password

- The UTHealth network address is https://webtopprod.uthouston.edu/webtop/component/main

# Initial Webtop Setup Steps

1. Chrome web browser works best

2. Start the app (see last slide for the address)

3. Key in your userid and password, then CHANGE the Repository to be "Student_Records"

4. Click on Login

# Initial Webtop Setup Steps

## Configure to use Saved Searches

- DO NOT USE the Search box in the top left corner of the Webtop session page

- Click on the Tools menu, then select Preferences

- In the Preferences: General popup, change the "Section to start in" to be Saved Searches.  Click OK.

- Logout (button top right) then log back in
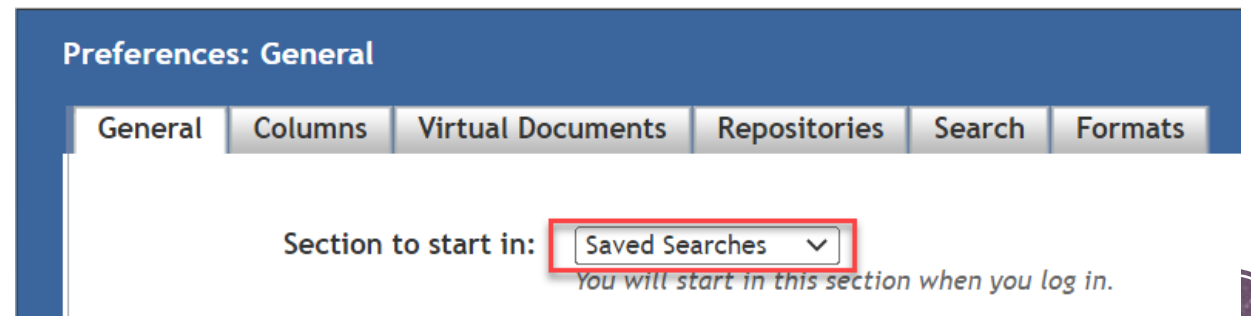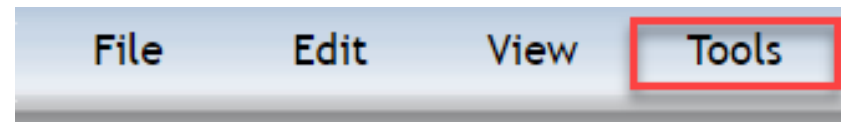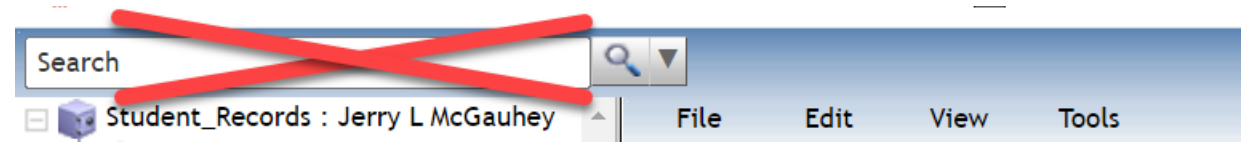
# Initial Webtop Setup Steps

## Set up Saved Searches

- This login should have selected
  Saved Searches in the left pane.
  If not, go back to the previous slide.

- Below the Webtop menus, select
  Saved Searches so that it is **bold**
  and not <u>underlined</u>

- At the right edge of the display,
  change Items per page to be 100

- Basic Setup is now complete.
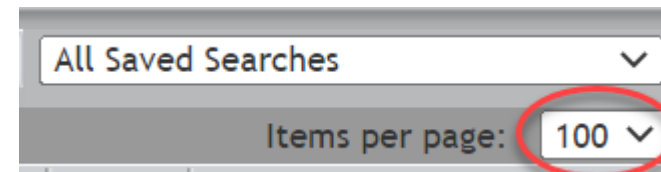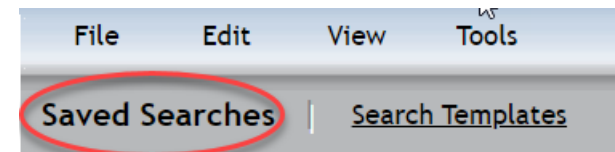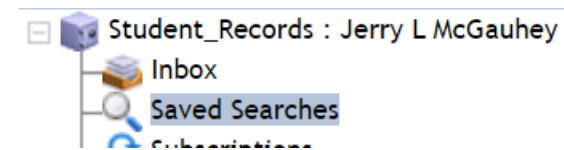
# Why use Saved Searches?

- Search box (top left) results are unpredictable because default parameters the user cannot see are used.
  - All documents for a person may not be retrieved.
  - Documents for more than 1 person may be retrieved.
  - DO NOT USE the Search box.

- Saved Searches…
  - are pre-configured to retrieve all documents for 1 person
  - display the retrieval list with ADDITIONAL INFORMATION about the document(s) in the columns presented

# Using Saved Searches

- Saved Searches may be
  - Public 👁 (generally available to all users) or
  - Private ⭐ (restricted to the creator)

- The Owner column of the Searches list denotes who created each one.
  - Owner = docuadmin are generic searches, created by an administrator userid
  - Owner = Another User may be available to you, but also may be modified by the creator for some special purpose.

# Using Saved Searches

- Click on the column heading word Name.  This will sort this list into alphabetic order (makes it easier to find what you are looking for)

- Search for Documents, not Folders

- Scroll down the list of Searches to find a blue icon'ed search owned by docuadmin
  - Document Search (uses the Studentid)
  - Documents – Student Name (uses last and first name)

- Right-click and choose Edit (to edit the searching criteria)

# Using Saved Searches

## Document Search

- This search will find every document for an individual person

- Replace the text "Emplid or A#" with the Studentid (CS Emplid) for the person

- Click Search

# Using Saved Searches

## Documents – Student Name

- This search will find every document for that student's name

- Replace the text "a" with the Last and the First name

- Click Search

Note: Names change. Follow this search with a Document Search for the studentid
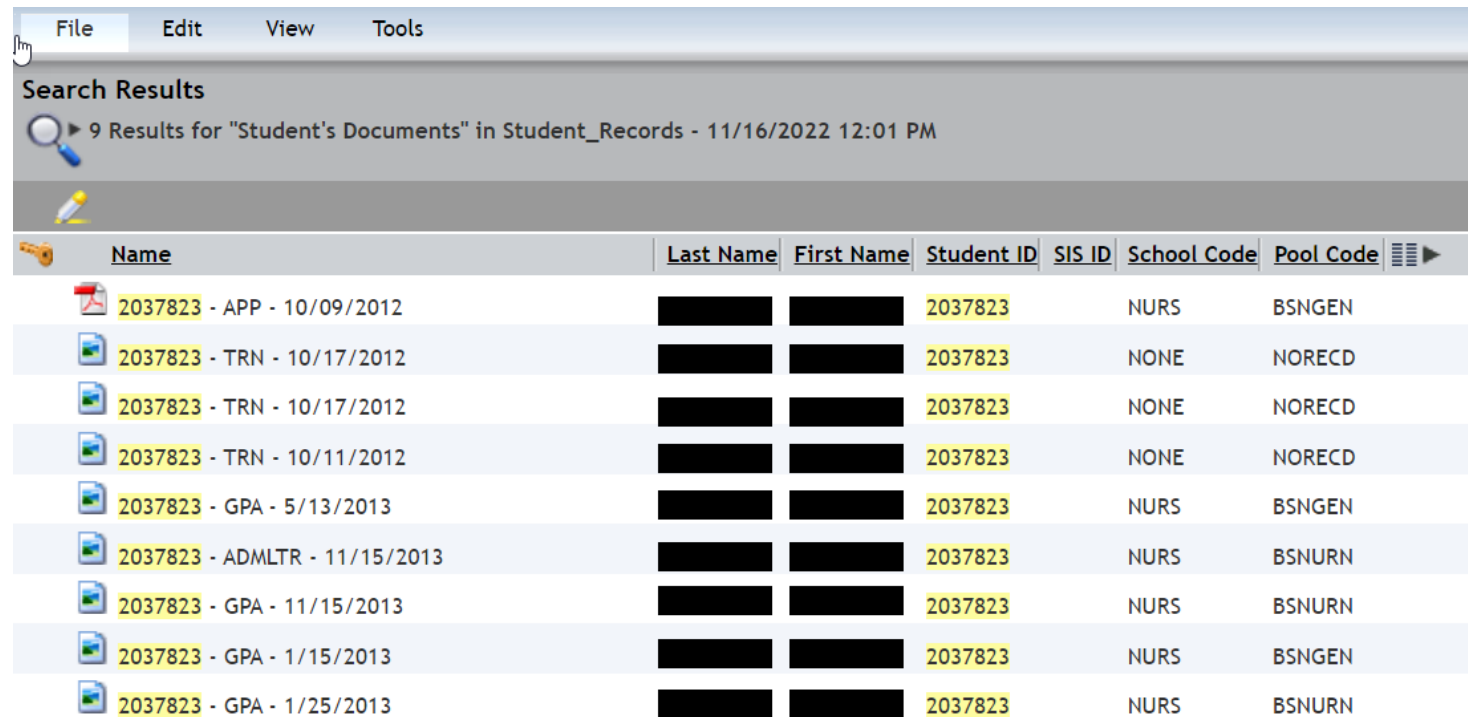
# Using Saved Searches

## Documents found

- Searching for 2037823 returns 9 documents.
  - Doctype is embedded in the document Name
  - School Code is presented
  - Pool Code contains the CS Plan Code

# Using Saved Searches

**Viewing and Navigating**

- Documentum security restricts opening documents for another School, unless there is a dual degree agreement between the two schools
  - Ex: NURS users cannot open documents for GSBS
  - Ex: SBMI and SPH users may open documents for both
  - Ex: MDAH users cannot open documents for UTHealth schools
  - Documents for School = None are available to all users

# Using Saved Searches

**Viewing and Navigating**

- To view a document, double-click the Name.
  A TECHNICAL point......Documentum itself does not DISPLAY the document, it retrieves the document and gives it to Windows for display. Windows must have an App identified as a default viewer for that document type (see the next slide for more info)

- To navigate to another student, use the Edit action to return to the Search criteria page, then enter a new student

# Windows Default Apps

- Search Windows using  for "default apps"

- Scroll to the bottom and select "Choose default apps by file type"

- Once the list displays (takes a short while), find and verify the following

  - .pdf has a default app of Adobe Reader (preferred, and free), Adobe Acrobat, or some other pdf reader program

  - .tif and .tiff has a default app of an image viewer which can display multi-page tif/tiff image files.