Navigate Documentum

Learning Objectives

In this Job Aid, you will learn how to:

1. Identify interface components  
   PAGE 3
2. Expand folders in the Navigation pane  
   PAGE 4
3. Collapse folders in the Navigation pane  
   PAGE 5
4. Resize the Navigation pane width  
   PAGE 5
5. Navigate using the hyperlink trail  
   PAGE 6
6. Open menu options in multiple ways  
   PAGE 7
Overview

The navigation tree is similar in form and layout to the standard file folder structure found on Mac and PC computers. The tree is comprised of cabinet and folder container nodes. When you select a cabinet or folder in the navigation tree, the content within that container appears in the Content pane.

Quick Tips

If you are a PCS user, you may also search for and/or navigate to your project via PCS:

1. In the PCS Quick Search text box, type the ISBN.
2. Click the Go button.
3. The Product screen appears. Click the Production tab, and then click the Format/File Management submenu.
4. In the ARCHIVE DETAILS section, type the Documentum ID if it does not appear, and then click the view dctm link.
5. Log in to Documentum via the SSO screens. The parent folder for your project appears.
1 Identify Interface Components

The Documentum interface is divided into three areas:

1. The **Banner** (the top of the screen) includes search and menu options.

2. The **Navigation** pane (the left side) represents the Documentum repository as a navigation tree.

3. The **Content** pane (the right side) is the work area.

More info
See Documentum Interface Quick Reference Guide for additional information.
2 | Expand Folders in the Navigation pane

To expand a cabinet or folder in the Navigation pane, click the plus sign + icon to the left of a node. Continue drilling through the folders by clicking the plus sign + icon until you reach the desired location.

Notes
• Only cabinets and folders appear in the Navigation pane, and files do not. Folders, subfolders, and files appear in the Content pane.
• If the folder you expand has fifty or fewer subfolders, they will automatically display. If the folder you expand has more than fifty subfolders, a branch with the total number of objects will appear beneath the folder. Click the numbered branch to display all of the subfolders in the Navigation pane.
3 | Collapse Folders in the Navigation Pane

1. To collapse a node in the Navigation pane, click the minus sign icon to the left of a cabinet or folder.

4 | Resize Navigation Pane Width

Resize the width of the Navigation pane to display more of the folder structure.

1. To resize the Navigation pane, slide the column header separator until you achieve the desired size.

Quick Tip
If the Navigation pane does not slide, refresh your browser.
5 | Navigate Using the Hyperlink Trail

1 Click a location in the hyperlink trail (breadcrumb trail) at the top of the Content pane to move up the folder hierarchy.

Quick Tip
You can use the hyperlink trail as a guide to verify where you are in the repository.

6 | Open Banner Menu Options in Multiple Ways

You can access menu options and perform actions on content in a variety of ways in Documentum.

a Select an object in the Content pane. Then, click the appropriate menu in the Banner, and select a menu option.
b Select a file and then right-click, or press **Control (CTRL)** and click.

c If an icon appears to the right of a file name in the Content pane, click the icon.

d Select a file, and type the keyboard shortcut.

**NOTE** All previous access options may not be available for certain menus.

More Info
Refer to the Documentum Keyboard Shortcuts Quick Reference Guide for full listings of keyboard shortcuts.