

Content Management

Module Objectives

- Describe an enterprise content management system
- Describe three types of Documentum end-users (“3C”)
- Define a Docbase
- State the operations that can be performed on a document in a Docbase

Enterprise Content Management

- ECM
- 3C
- Content Repository
- Life of a Document

Documentum is an Enterprise Content Management system that

- Stores and manages content of various types globally by
 - Securing content using permissions
 - Providing version control
 - Providing search tools to find content
 - Automated control of content through
 - A business lifecycle -- from initial creation to final archiving
 - All phases of a business process
- Dynamically assembles and delivers personalized content
- Integrates with
 - Authoring tools such as Dreamweaver
 - Other enterprise systems such as Lotus Notes or SAP

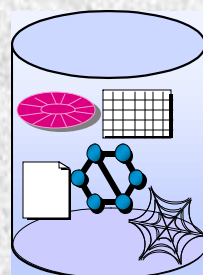
Documentum User Capabilities

✓ECM

- 3C
- Content Repository
- Life of a Document

Coordinator

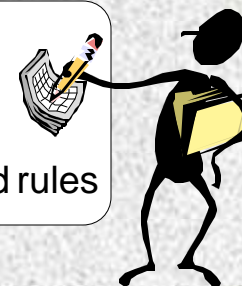
- Defines, manages lifecycles
- Creates workflows, workflow templates
- Creates, manages Virtual Documents



Docbase

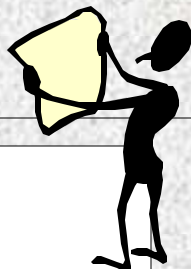
Contributor

- End user of application software
- Creates and contributes content
- Leverages existing templates and rules



Consumer

- Requires access to accurate business-critical information
- Does not edit, may review

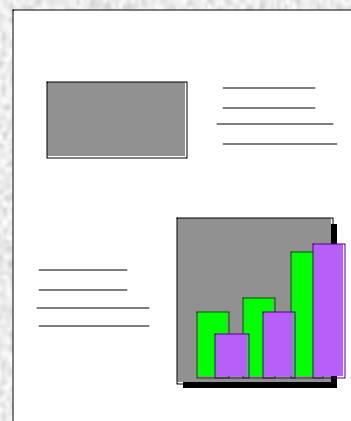


What is Content ?

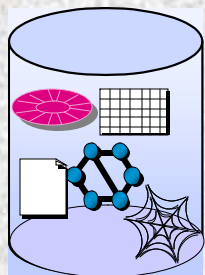
- ✓ECM
- ✓3C
- **Content Repository**
- **Life of a Document**

Content may be anything that best conveys information to the user and is stored electronically as a file of a particular type

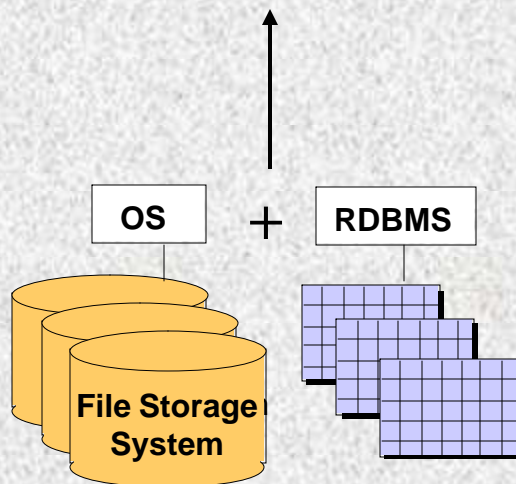
- Document
- Web page
- XML document
- Report
- Executable
- Engineering drawing
- Scanned image
- Audio or video file
- Thumbnail file
- Record



What is a Docbase?



Docbase

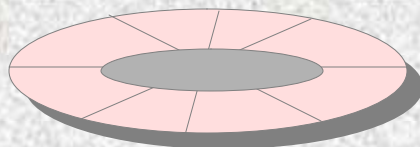


- Documentum's content repository
- Stores content on a file system provided via the Operating System (OS)
- Stores properties in a Relational Database Management System(RDBMS)
- Resides on a UNIX or a Windows server

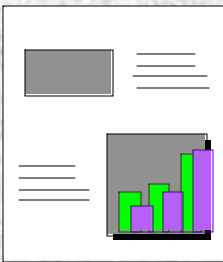
Docbase Objects

- Everything stored in a Docbase is stored as an object
- Documents, cabinets, folders, users are all examples of objects within a Docbase
- An object is a set of properties that sometimes points to content

object

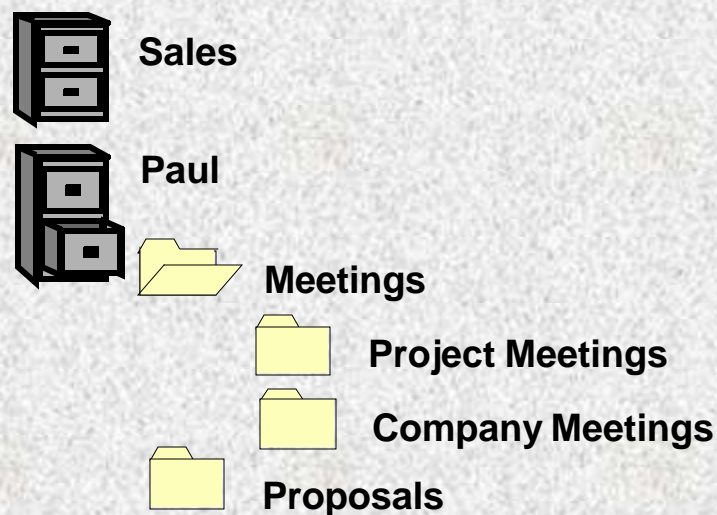


Document Object

Properties	Content
owner name creation date object name	

Cabinets and Folders

- Content in a Docbase is displayed using a Cabinet/Folder hierarchy
- Actual location of content on the server is transparent to users
- Each user is assigned a default cabinet or folder
- Multiple users can share the same default cabinet or folder



Life of a Document

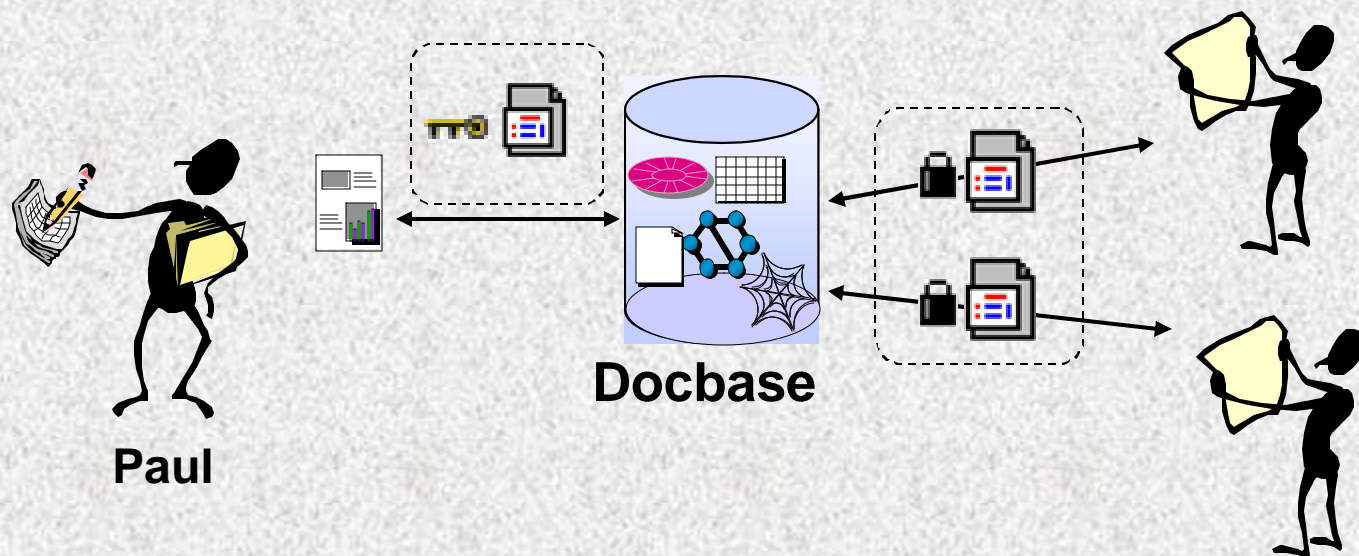
- ✓ECM
- ✓3C
- ✓Content Repository
- **Life of a Document**

Paul is a typical user of Documentum with the capability of a **Coordinator**. He has created a document in the Docbase using his favorite application.



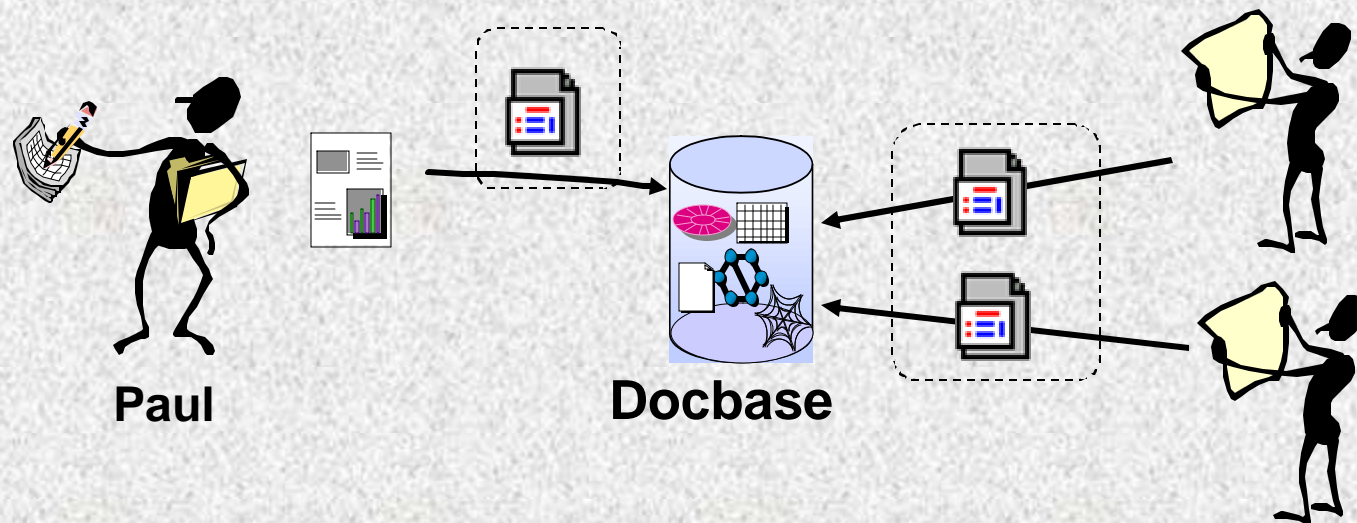
Checking Out Content

- Paul wants to change the content of his document. So he will check the document out.
 - Check out locks the document to ensure that only one person can edit it at a time
 - The content is copied to the client system. The changes to the document take place there.



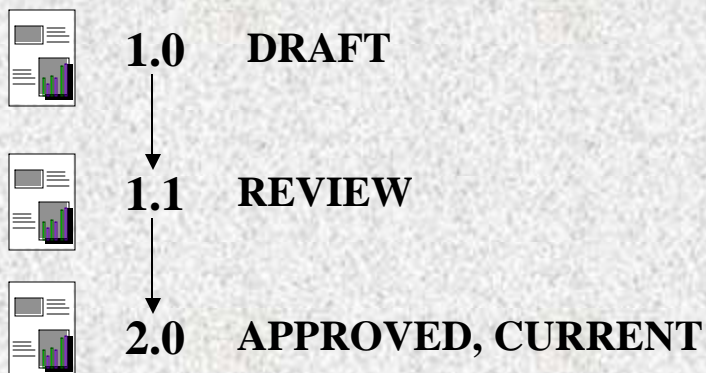
Checking In Content

- When Paul is done editing the content, he checks the document back in.
 - Check in releases the lock on the document and the content is moved back to the server into the Docbase



Creating Versions

- Upon check in, a new version may be created
- Each version is represented by a unique set of properties and content
- Each version has a unique implicit numeric label
- A version can also be assigned one or more symbolic labels
- The Documentum server by default assigns the symbolic label **CURRENT** to the last checked in version



Setting Permissions...

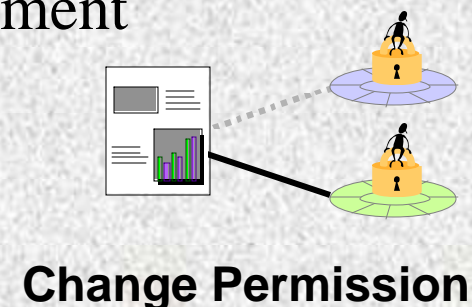
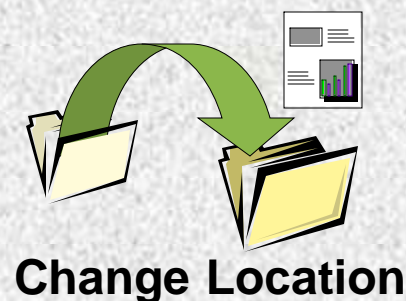
- Paul assigns basic permissions to his document
 - Permissions dictate who can do what to a document. The basic permissions are
 - NONE
 - BROWSE
 - READ
 - RELATE
 - VERSION
 - WRITE
 - DELETE
 - Basic permissions are hierarchical

Setting Permissions (continued)

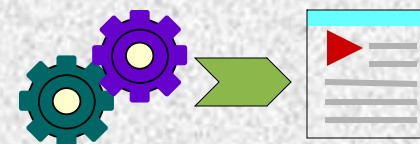
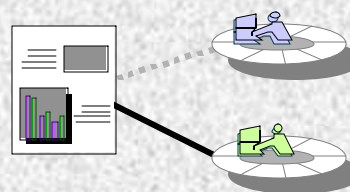
- Paul assigns extended permissions to his document

- The extended permissions are

- Change Location
- Change Owner
- Change Permission
- Run Procedure
- Change State

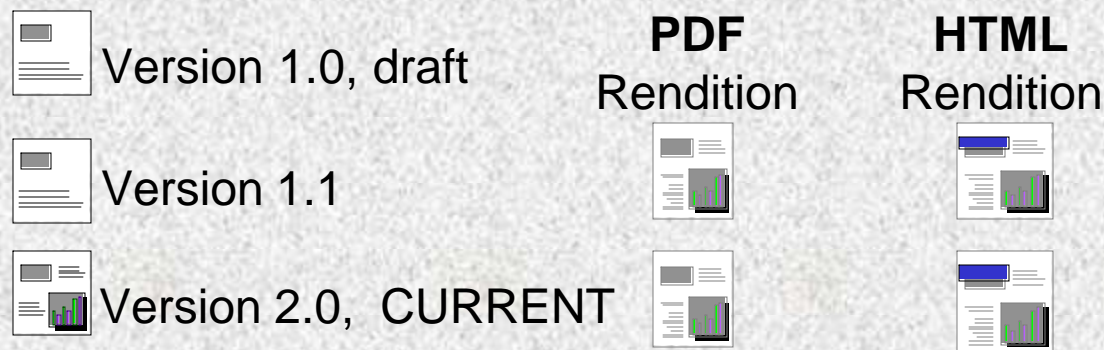


- Extended permissions allow a user to perform a specific action on an object



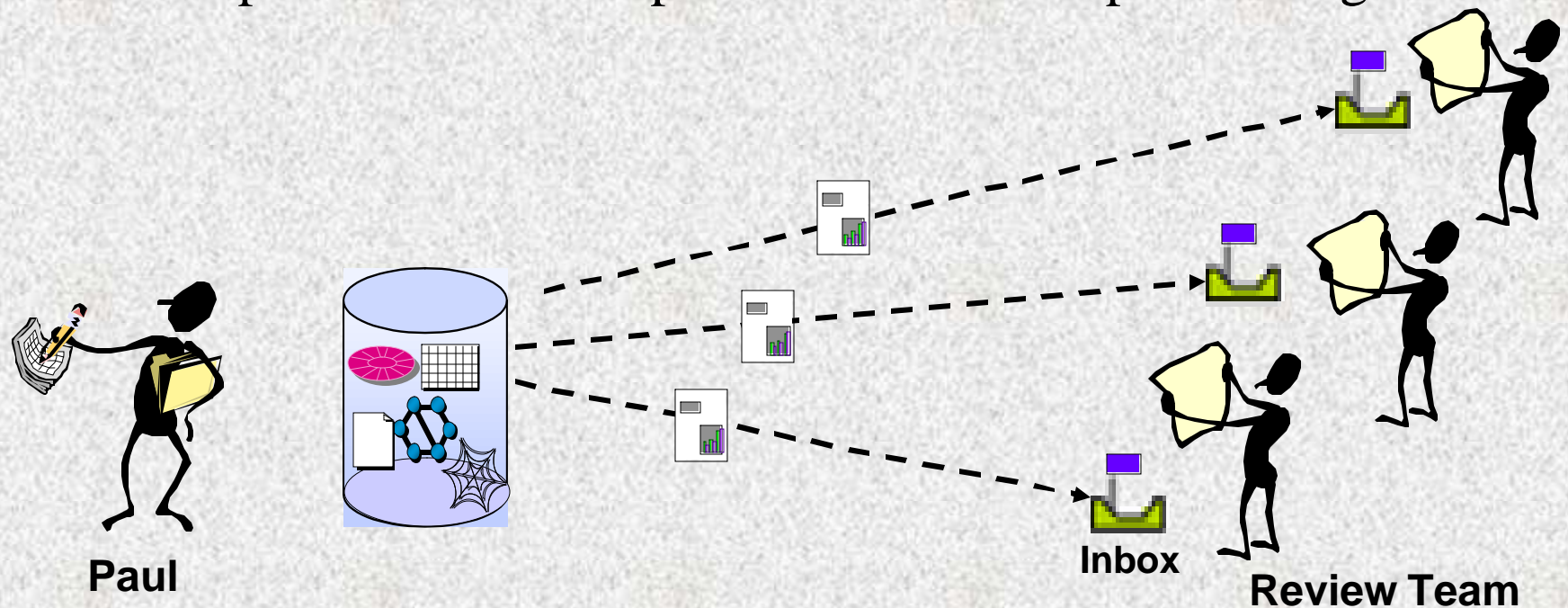
Renditions

- Paul creates a PDF rendition of his document's most current version
 - A rendition is a read-only representation of the content that differs from the original only in format
 - Each version of content can have multiple renditions in different formats
 - PDF renditions may be annotated without editing the original content



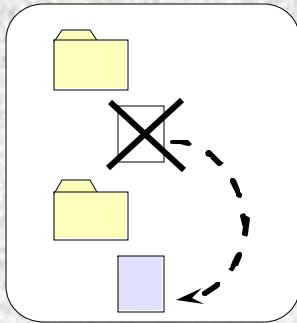
Workflow

- Paul starts a workflow process to route the latest version of his document to his review team
 - A workflow passes documents, information and tasks from one person to another person to achieve a particular goal

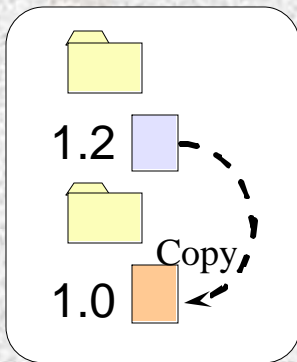


Moving, Copying, and Linking

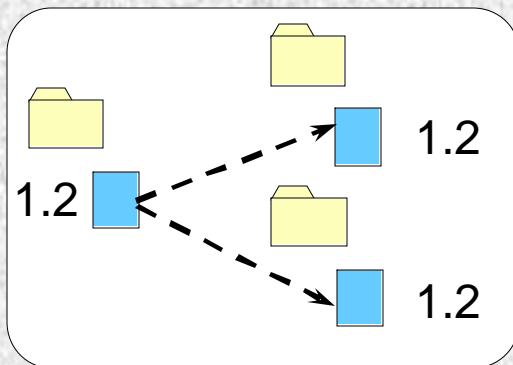
- ✓ECM
- ✓3C
- ✓Content Repository
- ✓Life of a Document



- Move
 - Moves content from one location to another



- Copy
 - Duplicates the current version and assigns version 1.0 to the new copy
 - Changes to the copy do not affect the original



- Link
 - Allows content to appear in multiple locations
 - An update to one affects all locations