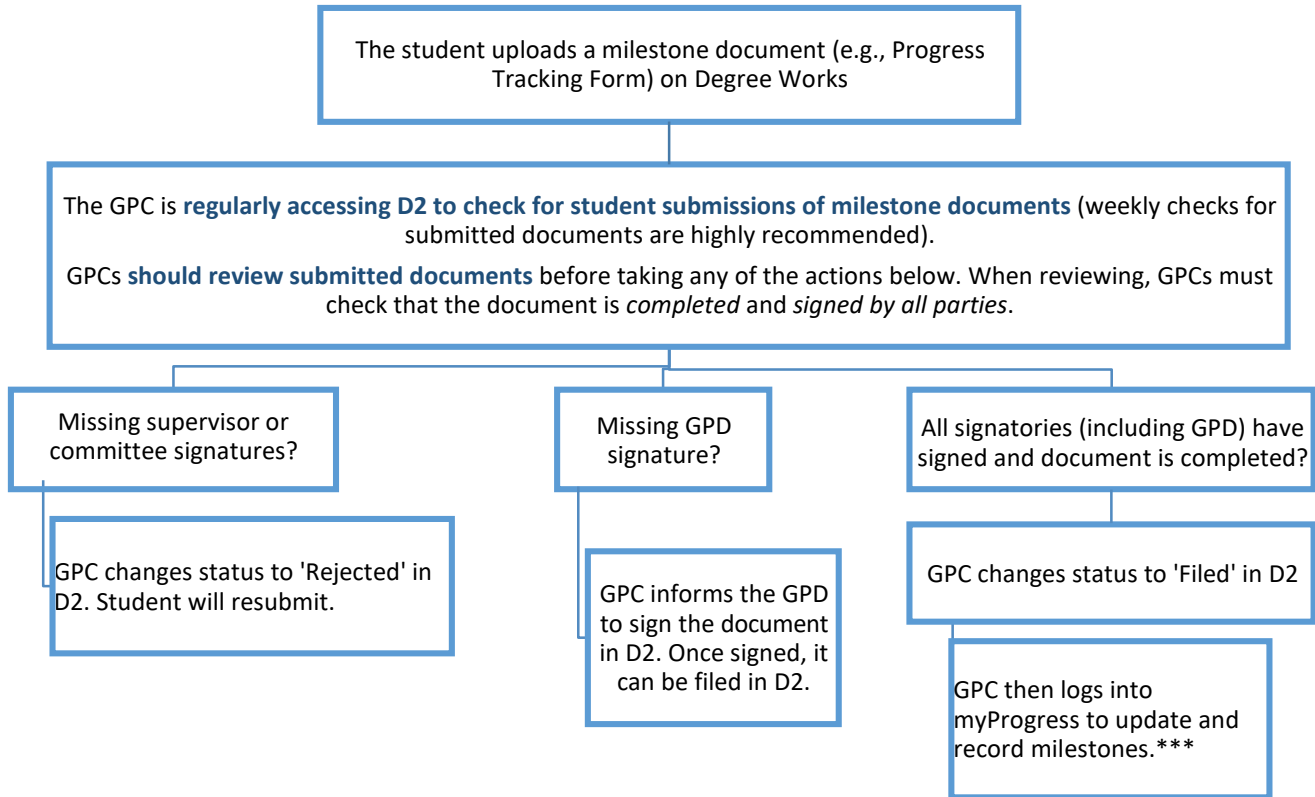


Managing Student Milestone Documents (D2 Documentum)

In the myProgress Hub, D2 Documentum (D2) is used to view, sign (GPDs only), and update the document status of required milestone documents that are uploaded by students through myProgress. All PhD students are required to upload the following milestone documents: Letters of Understanding and Progress Tracking Forms. It is strongly advised that Master’s students complete these documents as well.

Below is a visual of the process for reviewing, signing (for GPDs), and rejecting/filing milestone documents.



The instructions are provided in this document:

- [To access and check D2 for student submissions of milestone documents](#)
- [To open and review the milestone document](#)
- [To file a milestone document](#)
- [To reject a milestone document](#)
- [To sign a milestone document \(for GPDs\)](#)
- [Producing a D2 Excel list](#)

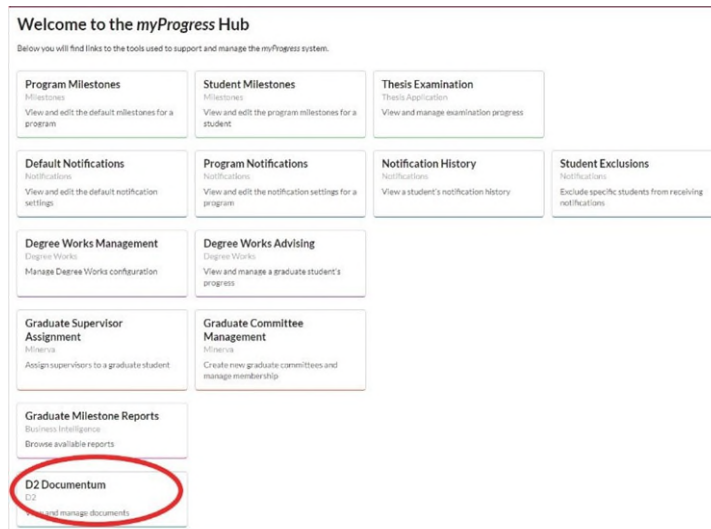
***For instructions on how to update milestones in myProgress after filing in D2 Documentum, please see our instructions [“Updating and Recording Student Milestones”](#)

To access and check D2 for student submissions of milestone documents

It is recommended that GPCs access D2 weekly to check for student submission of milestone documents. It is important to review, sign, and file milestone documents regularly to ensure students' timely progress towards their degree.

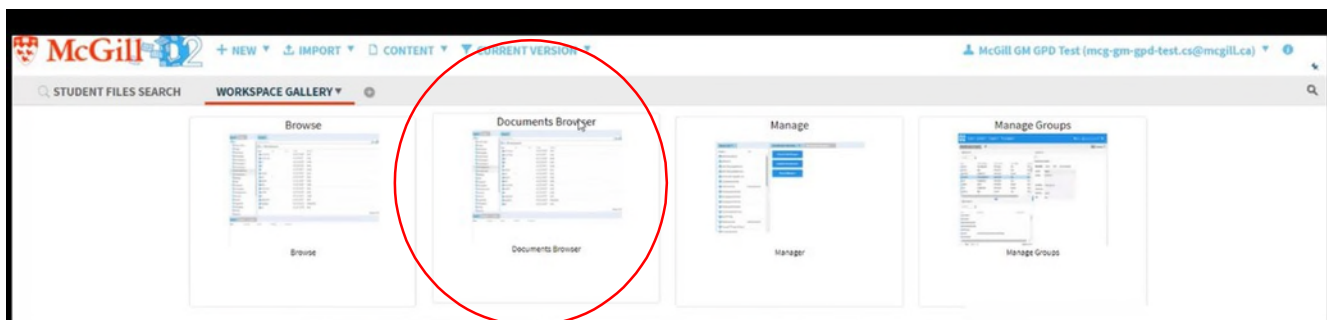
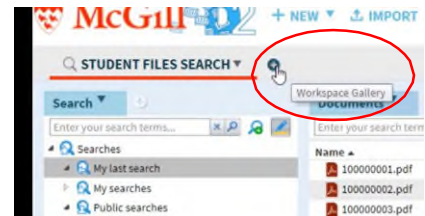
Step 1: Access **D2**. This can be done by logging into *Minerva > SR Admin Menu > myProgress (Graduate Milestone Management)*.

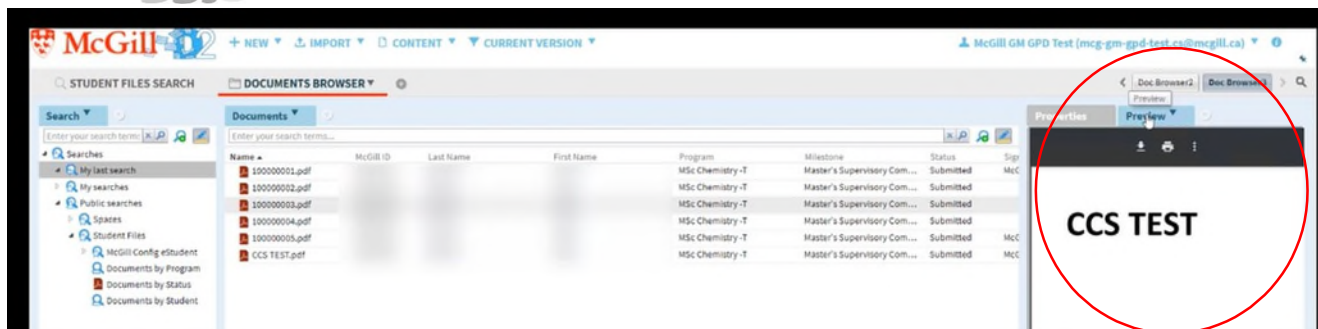
Step 2: Select *D2 Documentum*.



Step 3 (optional): If you want to be able to view documents in D2, as opposed to downloading PDFs, you can take these steps:

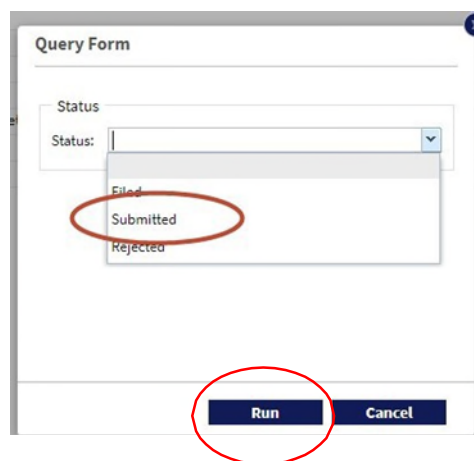
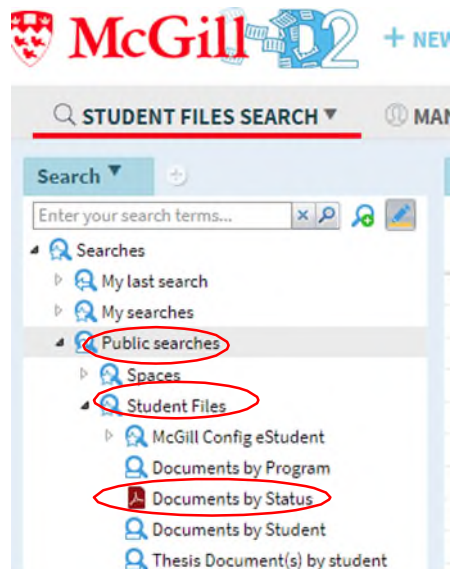
- 1) Prior to your starting the search in *D2*, click on the + at the top left corner of the screen
- 2) Choose *Documents Browser*.
- 3) Your view will shift to reflect a *Preview* widget.
- 4) Click once on the document to view in *Preview*





Step 4: Select the *STUDENT FILES SEARCH* workspace to initiate the search for student milestone documents. In the column to the left (see visual below, left), click on: *Public Searches > Student Files -> Documents by Status*.

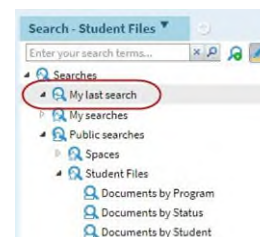
Step 5: Select *Submitted* in the Query Form pop-up window (see visual below, right). Then, click *Run*.



Step 5: Determine if further action is required. If no documents appear, no action is required at that moment. If submitted documents are listed, the GPC should review the document (go to next section- 'To open and review the milestone document').

A useful tip:

To quickly reproduce the search steps 3-4, you can use **My last search**. Clicking this command will reload the results of your last search. This is a rapid way to return to your document list at any point in time.



To open and review the milestone document

Step 1: Double-click on the file name you would like to review. The document will open as a PDF or you will see it through the preview widget (if you set it up according to the instructions on p.3).

Name	McGill ID	Last Name	First Name	Program	Milestone
Progress Tracking Report - MSC Yr1- 123456...				MA Educational Psycholog...	Master's Yr1 Progress Track...
Progress Tracking Report - PhD2- 123456789...				PhD School/Appl Child Psy...	PhD2 Progress Tracking

Step 2: Review the milestone document. It should be **completed** and **signed** by all parties.

→ Please note: GPD approval is required on all Progress Tracking Reports. GPDs can review and record their signature directly on D2 Documentum, instead of signing the form on a PDF.

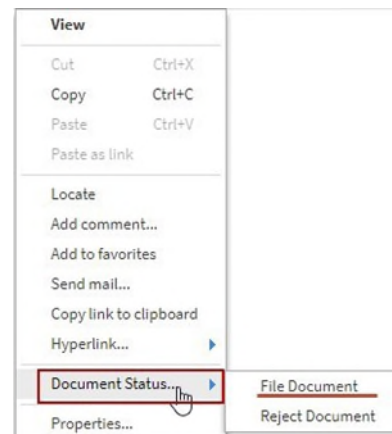
Step 3: Decide what action to take: to file, to reject, or contact GPD:

- A document can be filed when it is complete and signed by all parties. Filing instructions [here](#).
- A document should be rejected when it is incomplete or missing signatures from the student, the supervisor, or the committee. The student receives a notification that advises what action to take before they resubmit. Rejection instructions [here](#).
- The GPD needs to be contacted when their signature is missing from the progress tracking milestone document. The GPC should not file the milestone document and leave it marked as 'Submitted', until the GPD signs the document. Sign off instructions for GPDs [here](#).

To file the milestone document

Step 1: Right-click on the file name, then click *Document Status*.

Select the appropriate status: *File Document*.



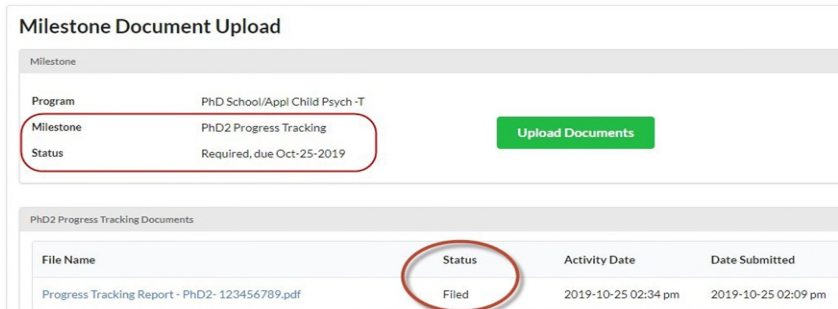
Step 2: Confirm the updated document status is correct.

Name	Status	Modified	Modified By
Progress Tracking Report - PhD2- 123456789.pdf	Filed	Oct 25, 2019 2:34:47 PM	gm_gpc0518_test

Note: If you select *Reject Document* in error, right-click again and change the status to *File Document*.

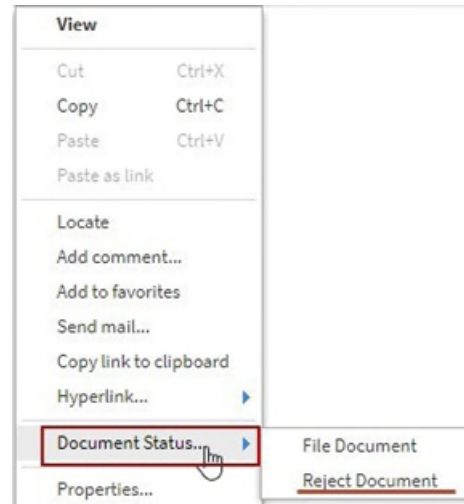
Step 3: It is **important** to update the corresponding milestone status after filing a milestone document. This action is taken in myProgress “Student Milestones”. Instructions are separate and provided in GPS’s “Recording and Updating Student Milestones” document.

Students are able to see the updated document status and milestone status in their myProgress Document Upload application →



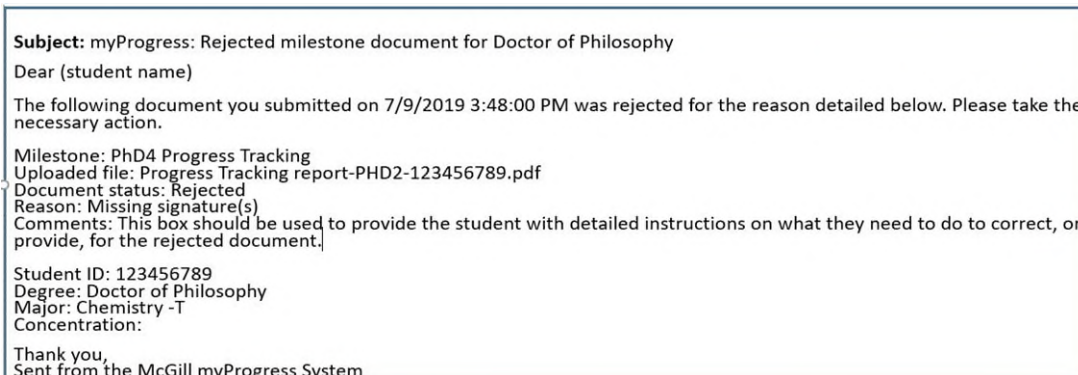
To reject the milestone document

Step 1: Right-click on the file name, then click *Document Status*. Select the appropriate status: *Reject Document*.



Step 2: Select the *Reason* for rejection from the drop-down list. Add your *comments (optional)*. Click **OK**.

An email will automatically be sent to the student notifying them of the rejection and the reason.



Please note: Rejected documents will remain available in D2 for 30 days. The system will automatically update the document status to **Obsolete** after 30 days. The document will automatically be deleted after 60 days

To sign a document in D2 (GPD only)

Instructions below are also available on video [here](#). GPD sign-off (Signature) is necessary before the document status can be updated to 'Filed' in D2.

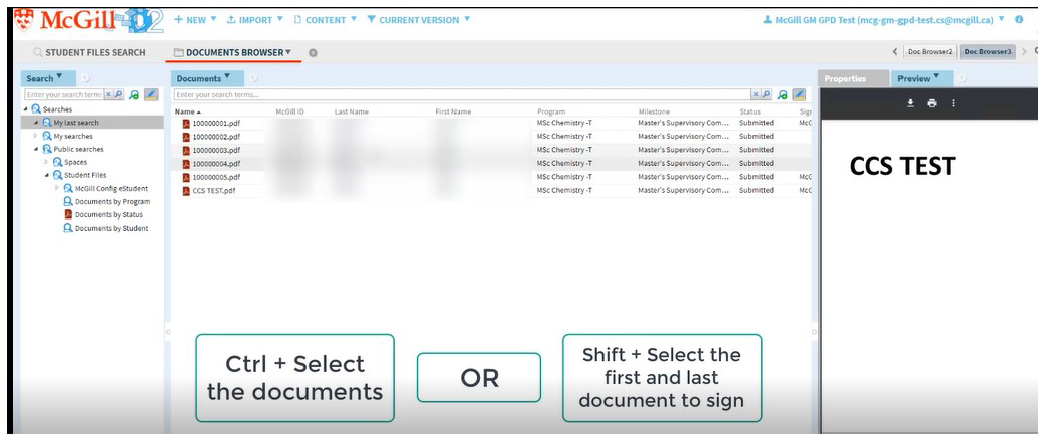
As a GPD, your approval is required on all Progress Tracking Reports. You can review and record your sign off directly on D2 Documentum instead of signing the PDF form prior to document submission. Please see the instructions below on how to sign a single document and how to sign documents in bulk.

Step 1: Complete the steps in the section: **To access and check D2 for student submissions of milestone documents.** We strongly recommend to complete Step 3 to enable the *Preview* widget.

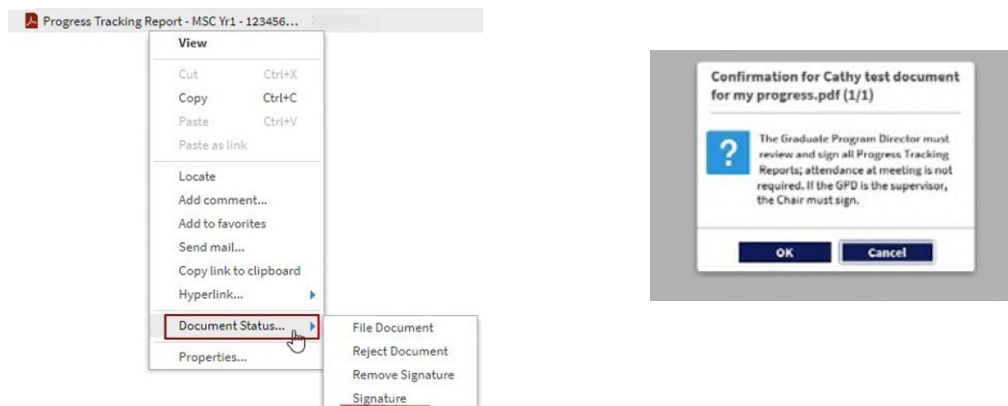
Step 2: Select the document(s).

→ To sign a single document: Right-click on the file name you want to sign.

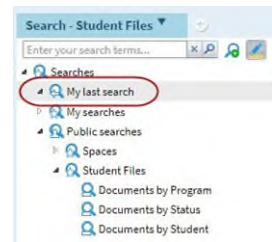
→ To sign several documents at once (bulk sign): Select documents to sign by taking either action **CTRL + Select the documents** OR **Shift + Select the first and last document to sign**. Then, right-click that selection.



Step 3: Click *Document Status*. Select the appropriate status: *Signature*. Click *OK* in the confirmation popup window. When bulk-signing, more confirmation popups will appear and require clicking *OK*.



Step 4: Confirm that the signature was recorded by reviewing document properties in D2 Documentum. You can click on 'Last search' to return to your original search for submitted documents.



The *Signoff by* and *Signoff Date* columns will show this information.

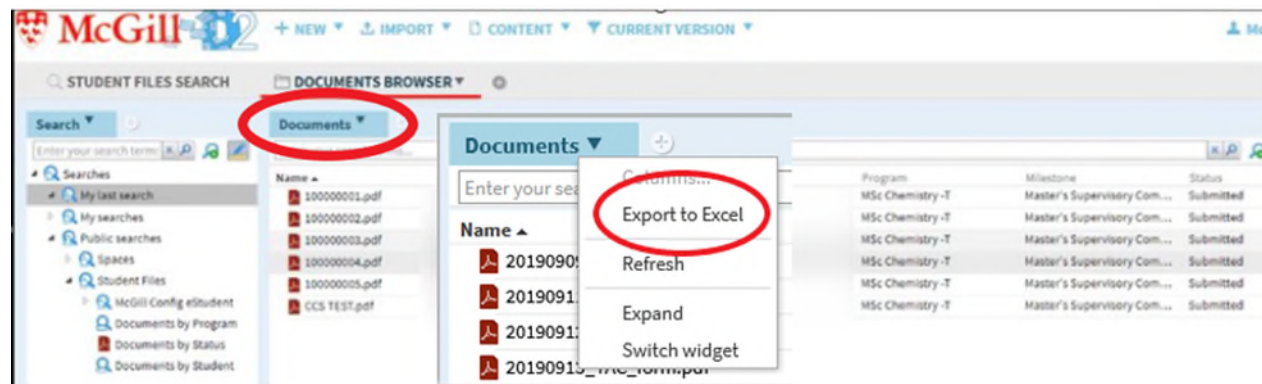
Name	McGill ID	Program	Milestone	Status	Signoff By	Signoff Date
Progress Tracking Report - MSC Yr1 - 123456...		MA Educational Psycholog...	Master's Yr1 Progress Track...	Submitted	gm_gpd0296_test	Oct 28, 2019 10:49:34 AM

Step 5 (optional): Signed documents need to be filed by GPCs. Your GPC will be able to see your document signoff in D2 once they enter the system, but D2 will not notify them of your action. It may be useful for GPDs to advise their GPC when they sign the documents so that GPCs are aware they need to proceed with the filing.

Note: GPDs can remove the sign-off by selecting *Remove Signature* in the Document Status drop-down list. The sign-off will automatically be removed from the D2 document properties.

Producing a D2 Excel list

You can produce an excel list of all D2 documents, which can be filtered by status, by clicking on the blue "Documents" tab above the list of documents and selecting "Export to Excel" from the drop-down menu. This is a useful tool for GPCs who file documents after the GPD has signed them within D2.



Milestone	Status	Signoff By	Signoff Date
PhD Comprehensive Examination	Submitted		
PhD Study Plan	Submitted	Prof.	24 Feb 2023 11:44:16
PhD Thesis Research Proposal	Submitted		
PhD Supervisory Committee	Submitted	Prof.	24 Feb 2023 11:45:36
PhD Study Plan	Submitted		
PhD Thesis Research Proposal	Submitted	Prof.	24 Feb 2023 11:44:09
PhD Thesis Research Proposal	Submitted		
PhD4 Progress Tracking	Submitted	Prof.	24 Feb 2023 11:45:40
PhD Study Plan	Submitted		
PhD Study Plan	Submitted		
PhD Thesis Research Proposal	Submitted		