

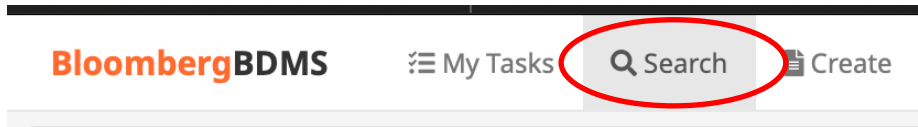
PDF Upload Tool documentation

Updating a PDF that has already been uploaded

Log into the tool: <https://bdms.bloomberglaw.com/bdms-www> using your Terminal login credentials. You'll need your BUNIT to generate an access code.

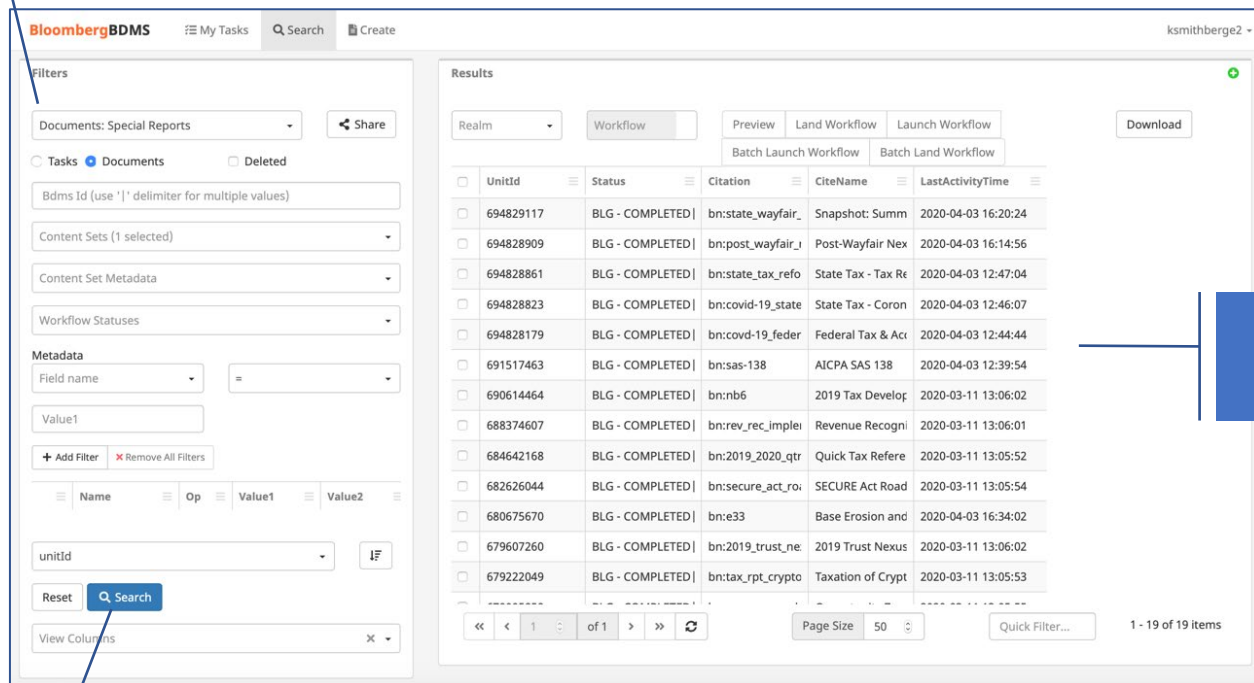
Step 1: Find the document you want to update

- Click on **Search**, in the menu bar, left corner



- In the Saved Query selection menu, select the "Documents: Special Reports" query, and click the blue Search button. You will see a display of all the PDFs that have been uploaded in this collection. You can adjust the width of the table columns in the results to make it easier to read document titles.

Saved query box

A screenshot of the BloombergBDMS search results page. The left sidebar shows the 'Filters' section with 'Documents: Special Reports' selected. The main area displays a table of search results. A blue callout box labeled 'Query Results' points to the table. The table has columns for UnitId, Status, Citation, CiteName, and LastActivityTime. The results show various documents with their respective IDs and activity times. At the bottom, there is a pagination control showing '1 - 19 of 19 Items' and a 'Page Size' of 50.

Query Results

Click Search to run query

Step 2: Create the first task, uploading the PDF

- Select your document by clicking in the check box beside the unitId
- In the Realm selection box, select TAX. In the Workflow selection box, select Replace Form. Then click the Launch Workflow button

The screenshot shows a 'Results' table with columns for UnitId, Citation, CiteName, and LastA. A 'Workflow' dropdown menu is open, showing options: Delete Form (Composed), Edit Form Metada (Composed), and Replace Form (Composed). The 'Replace Form' option is circled in red. The 'TAX' realm is also circled in red in the dropdown above. A blue callout box with the text 'Click on Launch Workflow' points to the 'Launch Workflow' button in the top right.

UnitId	Citation	CiteName	LastA
<input type="checkbox"/> 695100758	bn:mli_table_trea	MLI Table: Treaties Modified by B	2020-
<input type="checkbox"/> 695100618	bn:overview_of_t	Overview of the Master File/Loca	2020-
<input type="checkbox"/> 695100544	bn:cbc_reporting	CBC Reporting Deadline	2020-
<input type="checkbox"/> 694829117	bn:state_wayfair_	Snapshot: Summary of States' W	2020-
<input type="checkbox"/> 694828909	bn:post_wayfair_	Post-Wayfair Nexus Activity Road	2020-
<input type="checkbox"/> 694828861	bn:state_tax_refc	State Tax - Tax Reform Legislative	2020-
<input checked="" type="checkbox"/> 694828823	bn:covid-19_state	State Tax - Coronavirus Roadmap	2020-
<input type="checkbox"/> 694828179	BLG - COMPLETED bn:covd-19_feder	Federal Tax & Accounting Corona	2020-

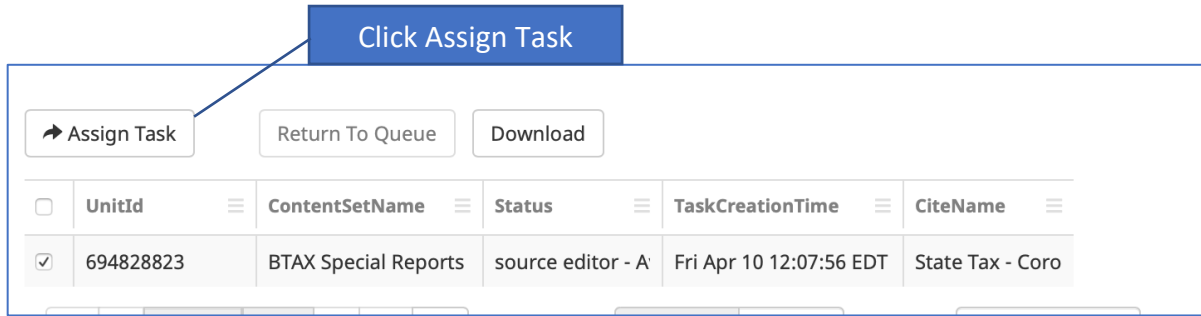
A green bar that says Success should appear at the top of the page. You have created your first task in this process.

Step 3: Find the task you just created and assign it to yourself

- Click into the Saved Query selection box and change the query to Tasks: Special Reports.

The screenshot shows a search interface with a dropdown menu set to 'Tasks: Special Reports'. There is a 'Share' button to the right. Below the dropdown, there are radio buttons for 'Tasks' (selected) and 'Documents', and a checkbox for 'Include non-human tasks'.

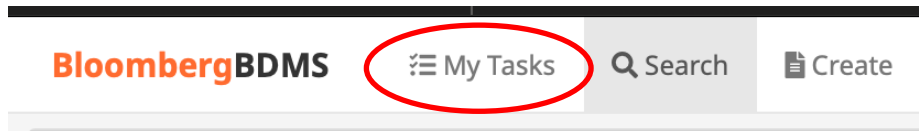
- Click the blue Search button to see the task you just created. The results screen will show all tasks that have not been completed. Yours should be the only task that appears, but if not, chose carefully.
- Select your task by clicking the check box and then click on Assign Task



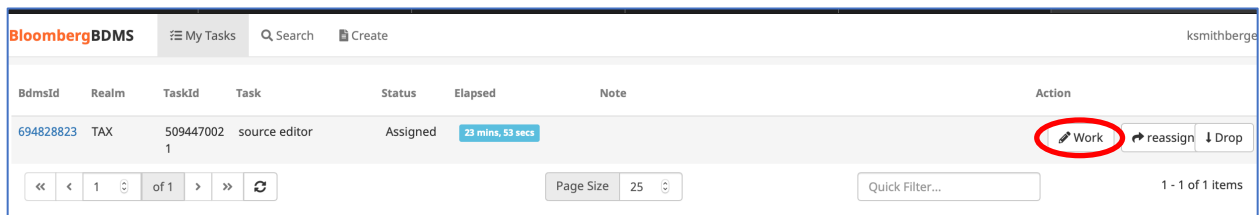
- Another modal will appear with your name in it. Click the Submit button to complete the task assignment

Step 4: Work on your assigned task

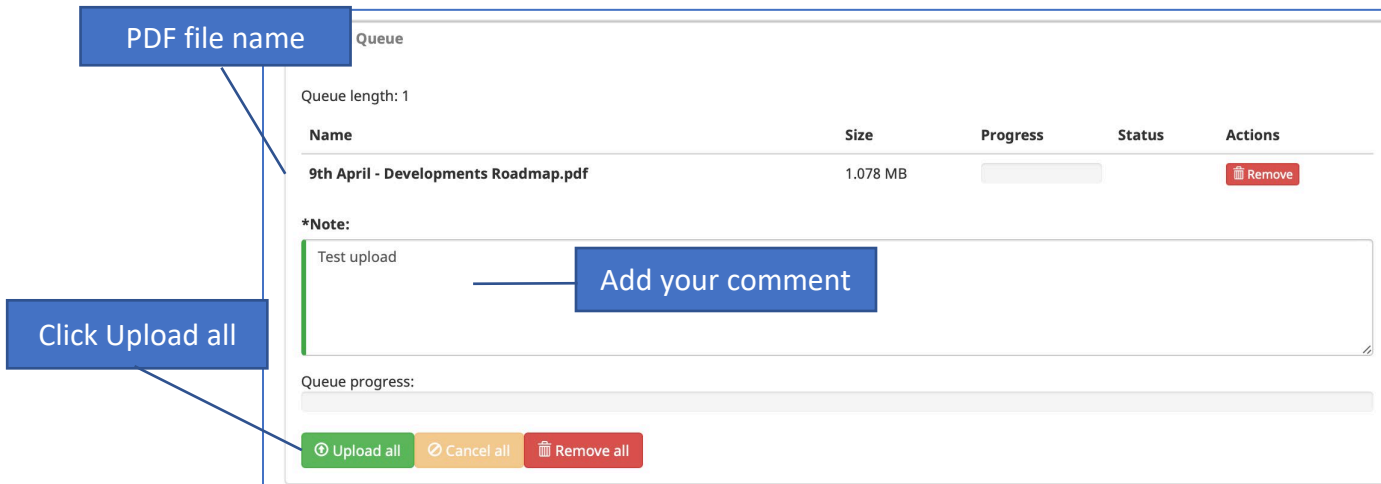
- Click on My Tasks in the menu bar



- The task you just assigned yourself now appears. Click on the Work button to open the PDF replacement page



- In the upload tool, drag the updated PDF to the Select Files box or use the green Choose Files box to select the file from a directory on your computer. Once the file is uploaded, you have to add a in the Note text window. Click Upload all to upload the PDF



- You'll see a message in the Queue progress bar telling you that the upload was successful
- Click on <- Task List button to exit the upload PDF page

Reports

View Document Download Document Reject ←Task List → Reassign

Upload Queue

Queue length: 1

Name	Size	Progress	Status	Actions
9th April - Developments Roadmap.pdf	1.078 MB	<div style="width: 100%; height: 10px; background-color: #0070C0;"></div>	✓	Remove

*Note:
Test upload

Queue progress: Files(s) uploaded successfully.

Upload all Cancel all Remove all

Step 5: Find the metadata edit task, assign to yourself and complete the process

Uploading the PDF successfully creates one more metadata task that needs to be completed before your PDF appears on product:

- Click on Search on the page menu bar

BloombergBDMS My Tasks Search Create

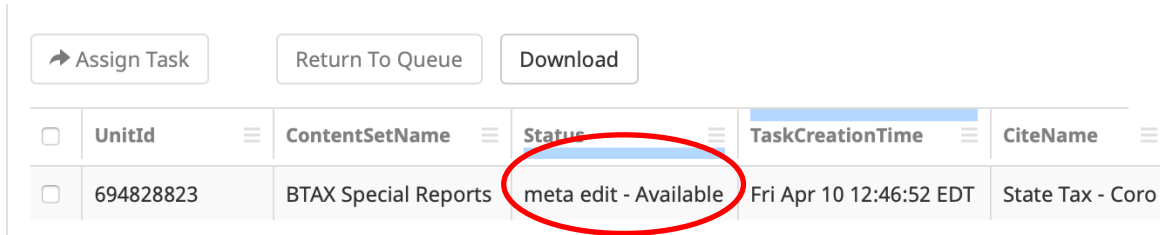
- Go to the Saved Search selection box and select the Tasks search again. Click on the blue Search button

Tasks: Special Reports [Share](#)

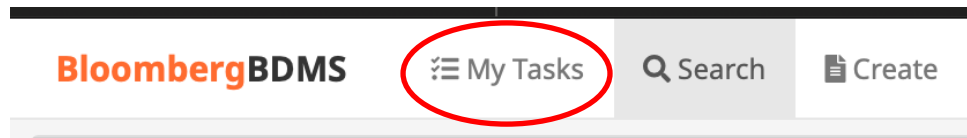
Tasks Documents Include non-human tasks

- You'll see a new task appear in search results. You can tell it's a different task because the status column will say 'meta edit – Available'

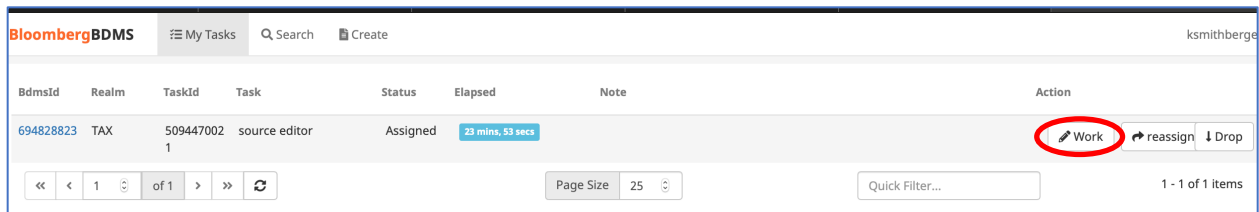
- Once again, select the task by clicking the check box and assign it to yourself



- Now it's back to My Tasks



- The task you just assigned yourself now appears. Click on the Work button to open the metadata edit/confirmation page



- In this screen you can add/remove various metadata fields if you chose to. It's not required.

A screenshot of the metadata edit/confirmation page for a task. At the top, it shows 'BdmsId: 694828823' and 'ContentSet: BTAX Special Reports'. Below this is a 'Note' field. The main section is titled 'Metadata (ContentSetId:759449 : Validation Check:MetaEdit_EDIT:RealmValCheck:TAX)' and contains several fields: 'Taxonomy' (with a 'Select Data' button), 'Document Title' (with the value 'State Tax - Coronavirus Roadmap'), 'State' (with a 'Select Data' button), 'International Organization' (with a 'Select Data' button), 'Country' (with a 'Select Data' button), and 'Report Type' (with the value 'Home Page'). At the bottom, there is an 'About_cite_ref(s)' field with a right-pointing arrow.

- When you are finished reviewing and updating metadata, click on Submit Document. If you wish to save your changes but upload later, click the Save button. **You do not have to click Save before Submit Document.**

