opentext™

OpenText™ Documentum™ D2

Version 16.4

User Guide

Legal Notice

This documentation has been created for software version 16.4.
It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

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Preface

OpenText™ Documentum™ D2 consists of two components:

- D2 Configuration: The web-based application, hereafter known as D2 Config, for administrators to use to configure settings such as automated content-handling processes and background settings for D2 Client.
- D2 Client: The web-based application, hereafter known as D2 Client, for users that provides the ability to interact with content in one or more repositories.

When this guide refers to D2, it refers to the product as a whole, not the individual components.

Note: Documentum Content Server is now OpenText Documentum Server. OpenText Documentum Server will be called Documentum Server throughout this guide.

Intended audience

The information in this guide is for end users accessing and using D2 Client.

Revision history

The following table lists changes in this guide.

Revision Date	Description
April 2018	Initial publication.

Chapter 1

Introduction

Description of D2

OpenText Documentum D2 consists of two components:

- D2 Configuration: The web-based application, hereafter known as D2 Config, for administrators to use to configure settings such as automated content-handling processes and background settings for D2 Client. For example, administrators use D2 Config to configure automatic renaming and placement of created or imported content. Other settings include content lifecycle and workflow, workspace layouts, and available widgets. D2 Config also handles plug-ins and communications with other applications, such as Documentum Retention Policy Services (RPS) and Documentum PDF Annotation Services (PAS).
- D2 Client: The web-based application for users that provides the ability to interact with content in one or more repositories. You use D2 Client to configure a user interface that streamlines necessary content management processes. For example, an interface displays widgets for quality assurance activities. Normally, this means someone drafting content would face difficulties trying to use an ill-suited user interface. D2 Client enables the drafter to create a workspace suited specifically for drafting containing only the information and widgets necessary to drafter-specific tasks.

Administrators configure the D2 installation environment based on your business needs. Therefore, they might be differences between the activities you perform from some of the activities described in this guide.

D2 Client allows you to:

- Personalize the user interface using widgets and workspaces.
- Perform searches across one or more repositories.
- Create, import, edit, modify, export, and delete content.
- Organize content manually and automatically using relationships, metadata, and so on.
- Use content lifecycle and workflow processes as constructed by administrators.

Chapter 2

Signing On

Logging In

1. Open a browser.
2. Navigate to the user interface at the following URL, **`http://server_name:port/D2`**, where `server_name` and `port` are where D2 is installed.
3. Select the **Repository**.
4. In the **Application** field, select the D2 Application to log into. Your system may be configured to hide this field, or an Application might be pre-selected.
5. In the **Login** field, type your user name.
6. In the **Password** field, type your password. You cannot log in without a password.
7. In the **Location** field, select the network location. Your system may be configured to hide this field.
8. In the **Domain** field, type the domain of the repository. Your system may be configured to hide this field.
9. Click **Login**.

Two minutes before the user session is expected to expire, a prompt is displayed. You can continue the session by clicking **Yes**. The prompt is displayed even when working on a dialog page such as the property page.

Related Topics —

Adding a New User or Repository Workspace, page 35
Setting Up Your First Workspace, page 10

Using D2 Client on an Apple iPad

D2 supports accessing D2 Client using an Apple iPad and the following touchscreen interactions:

- To open a content context menu, select the content in a list widget and click the triangle that appears next to the content.
- To open the search dialog, click the search icon. You can click out of the search dialog to hide the search dialog.

You cannot perform the following actions:

- Open separate instances of D2 in different browser tabs when you are accessing D2 using a WiFi hot spot.
- Select multiple items in a list.
- Drag and drop files.

- Hide the menu bar.
- Resize widgets.

D2 does not:

- Support the PDF Viewer widget on iOS.
- Auto-capitalize the first letter when typing in the login page.

D2 hides the following menu items for the Apple iPad:

- **Content** > **Edit**
- **Content** > **Checkin**
- **Content** > **Checkout**
- **Content** > **Cancel Checkout**
- **Content** > **View Native Content**
- **Content** > **View with native annotations**
- **Content** > **Edit with native annotations**
- **Content** > **Native Annotations**
- **Content** > **Check in native annotations**

Setting Up Your First Workspace

1. Log in to the repository.
2. In the **Workspace Gallery** dialog box, select a template.

   The system creates a workspace with a pre-configured page layout and set of widgets. You can:

   - Configure the workspace.
   - Set up another workspace.
   - Start using content management or workflow tasks.

   Note: The workspaces provided may be provided in a read only form locked), so you might not be able to add or remove widgets from the workspace.

Related Topics —

Determining Which Internal Widgets to Use, page 18
Understanding Widgets, page 14
Understanding Workspaces and Workspace Views, page 13
Logging In, page 9

Understanding the Menus

Use the menus as described in the following table:

Menu	How to access
Workspace	Click the menu button next to the name of the active workspace. Understanding Workspaces provides additional information.
Widget	Click the menu button next to the widget title. Understanding Widgets provides additional information.
Column	Click the menu button next to a column name. Understanding Widgets provides additional information.
Menu bar	If the menu is hidden, hover your mouse over the top edge of the work environment. Use the Pin to hide or lock the menu bar.
Context	Right-click within widget boundaries. Widgets have context menus containing options specific to the selected widget.

Related Topics —

Understanding Widgets, page 14
Understanding Workspaces and Workspace Views, page 13

Chapter 3

Building Workspaces

Understanding Workspaces and Workspace Views

A workspace is a container of widgets that allows you to personalize functionality for availability and convenience. The process of building a workspace is summarized as:

1. Creating an instance of a workspace template.
2. Adding widgets to your workspaces to suit your needs.

D2 includes pre-configured workspace templates. These templates contain the layout and positioning of widget areas. The templates also come with a predetermined set of widgets.

Administrators can configure workspaces to contain workspace views. Views function the same way as workspaces but provide a method for organizing widgets without losing widget-to-widget interaction, as described in the following table:

If you have a workspace for Search widgets and a separate workspace for Lifecycle widgets	If you have a view for Search widgets and a view for Lifecycle widgets in the same workspace
If you perform a Locate operation in the Search workspace, the widgets in the Lifecycle workspace do not respond to the query because they belong to a different workspace. You must add lifecycle widgets to the search workspace to perform the Locate operation.	If you perform a Locate operation in the Search view, the widgets in the Lifecycle view retrieve the results of the query because they belong to the same workspace.

You can access, add, switch, and close workspace as described in the following table:

Action	To perform this action
Accessing the workspace menu	Click the menu button on the active workspace tab.
Adding a workspace	Click the **+** button next to an opened Workspace. Select a workspace from the **Workspace Gallery**.
Restoring a workspace to its default configuration	On the workspace menu, select **Reset workspace**.
Changing the workspace view	Select a workspace view from the buttons next to the workspace tabs.
Closing the current workspace	On the workspace menu, select **Close workspace**.

Action	To perform this action
Closing all other workspaces	On the workspace menu, select **Close other workspaces**.
Switching workspace layout	On the workspace menu, select **Switch workspace**. Select a workspace from the **Workspace Gallery**. When the default workspace is locked, the Switch Workspace option is not available.
Changing theme	On the workspace menu, select **Change theme**. Select a theme from the **Theme Gallery**.
Resizing a workspace region	Grab the marker (anywhere in the space between the regions) and drag it to the desired size.
Collapsing a workspace region	Double-click the graphic trigger between the open regions. A graphic trigger has a triangle. **Note:** You cannot collapse the center region.
Showing a collapsed region	Click on a collapsed region bar. The region is displayed as a fly-out panel that floats over the other regions. A subsequent click on the region bar hides the floating fly-out panel.
Expanding a workspace region	Double-click the graphic trigger next to the closed region bar.

Related Topics —

Determining Which Internal Widgets to Use, page 18
Understanding Widgets, page 14
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Setting Up Your First Workspace, page 10
Understanding the Menus, page 10
Understanding Widgets, page 14

Understanding Widgets

A widget is a graphical user interface (GUI) element that you use to construct a workspace. You select and change widgets to personalize workspace templates to suit your needs. Widgets enable you to search and access information as well as manage content workflows and lifecycles. Administrators can configure widgets to interact with the current workspace, for example by setting a widget to the active state or switching you to a different workspace view.

For example, you have selected a default repository browsing workspace as your template, but you want to reorganize content as the repository has become cluttered. You can place the Relations widget in a visible, prominent area. When the Relations widget displays the content connections information, you can see how the documents are clustered and streamline the reorganization.

There are internal and external widgets. An internal widget has core functionality with regards to content management and workflow. An external widget uses third-party web applications, and administrators can configure them to communicate with content properties.

Note: If the widgets you are using are in two different workspaces, an event that happens in one widget (for example, selecting a document in a doc list widget and having focus switch to the task list widget) will not be picked up in the second widget.

You can control widgets as described in the following table:

Action	To perform this action
Add a widget	Click the **+** button next to the widget or on the widget menu.
Removing or hiding a widget from a tabbed widget layout	On the widget menu, select **Remove widget**. If the widget was: • Provided by the workspace layout XML, D2 places the widget in a hidden state and it can respond to context-sensitive behavior. For example, you can hide the Document list widget and then perform a search. If the administrator configured context-sensitive behavior to show the Document list widget after performing a search, the Document list widget reappears in the workspace and shows the search results. • Manually added to the workspace from the Widget Gallery and was not part of the original workspace layout, D2 removes the widget and it does not respond to context-sensitive behavior. For example, if you remove the Document list widget and then perform a search, D2 looks for a different widget that can show search results. If D2 does not find such a widget, the workspace does not show the search results. To begin using the Document list widget again, you must manually add the Document list widget back into the workspace.
Changing widgets in a standalone widget layout	On the widget menu, select **Switch widget**, then select a widget from the **Widget Gallery**.

<table>
<tr><th>Action</th><th>To perform this action</th></tr>
<tr><td>Moving widgets</td><td>Drag and drop a widget.

If you have a widget container without tabs, when you drag and drop a different widget on that container, the new widget takes the place of the original widget and the original widget moves to the container that previously contained the new widget.

For example, your workspace could have the following: a tabbed widget container that has three widgets (such as a Locations widget, a Renditions widget, and a Versions widget) and a widget container without tabs that has one widget (a Document List widget). When you drag and drop the Locations widget into the container without tabs, the Document List widget moves to the tabbed widget container.

Note: Any list widget dragged to replace the Repository Browser widget will not display any files.</td></tr>
<tr><td>Expanding to full-screen mode</td><td>1. Double-click the widget name.

2. Collapse back to workspace mode.

3. Double-click the widget name.</td></tr>
</table>

You cannot add, remove, hide, or move widgets if the administrator locked the workspace.

Note: You need to refresh the D2 Client browser to reflect any changes made to the D2 Config.

Note: The workspaces provided may be provided in a read only form locked), so you might not be able to add or remove widgets from the workspace.

You can access, export, and reorganize list widgets as described in the following table:

Action	To perform this action
Exporting the list to Excel	On the widget menu, select **Export to Excel**, then type the file name and select the location to which to save the file.
Changing the list columns	On the widget menu, select **Customize**. To add a property as a column, you must know the object type in which the property resides. The list control only searches within the selected type. **Note:** If the administrator has configured the maximum result size for the User, Group, Doclist, Thumbnails and List assistance widgets then the D2 Client displays a filter at the top of the widget.
Grouping items by property value	On the column menu, select or clear **Group By This Field** to toggle grouping items by the value of the column. For example, if you select this option on the **Status** column, D2 organizes content by lifecycle states such as **`Draft`** and **`Approved`**.
Using column filters	On the column menu, select **Filters**, select the field, and select or type the filter depending on the column property. The following icon appears at the top of the column to indicate that you applied a filter:  To clear the filter, click the filter icon at the top of the column.
Sorting by column	On the column menu, select **Sort Ascending** or **Sort Descending**.

Related Topics —

Determining Which Internal Widgets to Use, page 18
Understanding Workspaces and Workspace Views, page 13
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Setting Up Your First Workspace, page 10
Understanding the Menus, page 10
Understanding Workspaces and Workspace Views, page 13

Determining Which Internal Widgets to Use

Use internal repository navigation widgets as described in the following table:

Widget	Description
Browser	Displays cabinets and folders. Enables uncluttered browsing of a repository tree.
Document list	Displays content and virtual documents. Enables full browsing and content-seeking capabilities. Use this widget to access the content context menu. Displays results from Quick search and Predefined search widgets. Provides a quick search toolbar (docked at the top of the widget) to enable quick search capabilities from the widget. **Note:** Administrator can control the availability of quick search for Document list widgets.
Thumbnail	Enables thumbnail previews for browsing content. You must set up a thumbnail server to show and customize thumbnails. Provides a quick search toolbar (docked at the top of the widget) to enable quick search capabilities from the widget. **Note:** Administrator can control the availability of quick search for Thumbnail widgets.
PDF Viewer	Displays the PDF rendition of selected content. The widget displays a message if a PDF rendition is not found for selected content.
Favorites	Displays a list of content marked as favorite.
Checkout	Displays a list of checked-out content with user name and time of checkout.
CenterStage browser	Enables browsing of CenterStage spaces. Only displays the Collaboration folder.

Widget	Description
Comments	Enables viewing, creating, deleting, and replying to comments about content.
Recycle Bin	Enables managing and restoring deleted content. If you have administrator privileges, you can access the recycle bins of other users.

Use search widgets as described in the following table:

Widget	Description
Quick search	Enables full-text searches.
Search query form	Enables using pre-configured query form searches. Administrators configure an instance of the search query form widget for each query form option. Select the widget instance that matches the query form search you want to use.
Searches	Enables viewing, editing, and running past and saved searches.
Facets	Displays facet categories based on the search results along with the facet values for each category. The facet selection will also be displayed in the doclist breadbox. The breadbox displays the facets selection in the order you added or modified the facets.

Use internal content properties widgets as described in the following table:

Widget	Description
Properties	Displays properties of the selected content.
Locations	Displays a list of directory locations in which the selected content is found.
Versions	Displays a list of the versions of the selected content.
Renditions	Displays a list of renditions of the selected content.
Relations	Displays a list of what is linked to the selected content. This widget manages content distribution by allowing you to start distributions, edit the list of recipients, and generate reports.
Distribution	Displays a list of distributions sent to the user. This widget allows you to accept, reject, and stop distribution tasks.

Widget	Description
Audit	Displays a list of audited actions for the selected content.
Preview	Displays the selected content as a slideshow. You must set up an ADTS rendition server to render previews and storyboards.
Virtual document	Displays virtual document structure.
Snapshots	Displays a list of virtual document snapshots for a virtual document selected in a Doclist or Virtual document widget.
Retentions	Displays retention policies applied to the selected content.
Markups	Displays markup policies for the selected content.

Use internal workflow widgets as described in the following table:

Widget	Description
Tasks browser	Displays a list of tasks sorted by category that have been assigned to you. Use this widget to refresh the Workflow task list widget.
Workflow history	Displays a list of past and current events to show workflow progress. You must have at least queue manager permission to access this widget.
Workflow task list	Displays a list of tasks that have been assigned to you. Use this widget to access the workflow context menu.
Task overview	Aggregates information from other task widgets into one widget for easy access. Includes a toolbar that allows you to perform common actions on tasks (such as Approve/Reject), a Details panel containing summary and instruction content, a Note panel for annotating tasks, and full access to task reference documents.
Task details	Displays the subject and message of the selected task.
Task notes	Displays a list of accompanying notes to the selected workflow.

Widget	Description
Task attachment	Displays a list of content attached to the selected task.
Workflow performers	Displays a list of users organized by groups assigned to the workflow.
Workflow Preview	Displays the schema of the workflow template for the selected task.
Delegations	Enables viewing, creating, editing, and deleting delegations and managing delegation status.

Use administration widgets as described in the following table:

Widget	Description
User	Displays a list of users for the repository. Use this widget to add, edit, and remove user accounts and to change group memberships.
Group	Displays a list of user groups for the repository. Use this widget to add, edit, and remove user groups.
Dictionaries	Displays a list of repository dictionaries. Use this widget to view, export, and configure dictionaries and values.
Taxonomies	Displays a list of repository taxonomies. Use this widget to view, export, and configure taxonomies and values.

Related Topics —

Understanding Widgets, page 14
Understanding Workspaces and Workspace Views, page 13
Understanding Widgets, page 14
Understanding Workspaces and Workspace Views, page 13
Setting Up Your First Workspace, page 10

Chapter 4

Using D2 Administration Nodes

Understanding Administration Widgets

You can use administration widgets in D2 Client to access and control user, group, dictionary, and taxonomy components in the repository. You must be part of a designated group with administrator widget privileges to make changes in these widgets.

The widgets provide two use-cases:

- Administrators can configure these settings without having to open an instance of D2 Config.
- Administrators can delegate control to a specified group of users without providing access to D2 Config.

Create and configure user accounts for access to D2 Client using the Users widget as described in the following table:

Action	Description	To perform this action
Add a new user	Add a new user profile for accessing the repository.	Navigate to **New** > **User** from the menu bar. Configuring User Profiles contains further instructions.
Edit user properties	Edit an existing user profile.	In the Users widget, right-click and user and select **Properties** to open the **User properties** dialog box. Configuring User Profiles contains further instructions.

Create and configure user groups using the Groups widget as described in the following table:

Action	Description	To perform this action
Add a new group	Add a new group for managing users. Create groups and subgroups to reduce performance overhead. For example, performing an action on a group with 100 subgroups requires less resources than performing the action on the 100 subgroups. **Note:** The prefix d2 is reserved. Any group names beginning with d2 are not listed in the Admin Group widget.	Navigate to **New** > **Group** from the menu bar.
View members of a group	View the users that belong to the group.	In the Groups widget, right-click a group and select **Show group members**. The widget lists the users under the group.
Edit group properties	Edit the properties of an existing group.	In the Groups widget, right-click a group and select **Properties** to open the **Group properties** dialog box.

D2 uses dictionaries to automatically generate the selections in forms. For example, an administrator can configure a list box in a property page to use a dictionary. The choices you see in the list box are as described in the dictionary. If you have access to administrator nodes in D2 Client, you can configure and export dictionaries. You cannot create a new dictionary.

Note: When the number of dictionary entries is greater than 750, rather than editing the entries directly in the Dictionary Widget, D2 will download all of the entries into an Excel file. You can edit this Excel file and then re-import your updates using the Dictionary Widget.

Perform administrator actions on dictionaries using the Dictionaries widget as described in the following table:

Action	Description	To perform this action
Import data into a dictionary	Import a CSV, Excel, or XML file with data into a dictionary.	1. In the Dictionaries widget, right-click a dictionary and select **Import dictionary data**. 2. Click **Browse** and select the data file. 3. If you selected a .csv file, type the separator character used for the table. If you enter an incorrect separator, D2 shows an error message during table import. 4. Select to either **Overwrite dictionary data** or **Append dictionary data**. 5. Click **OK**.
Edit a key value	Edit the values of a dictionary.	1. In the Dictionaries widget, right-click a dictionary and select **Properties**. 2. Click the **Languages** or **Alias** tab depending on the key you want to edit. 3. Make changes to the table cells. 4. Select to activate the key. 5. Click **OK**.

Action	Description	To perform this action
Add a new key value	Add a dictionary value.	1. In the Dictionaries widget, right-click a dictionary and select **Properties**. 2. Click the **Languages** or **Alias** tab depending on the key you want to edit. 3. Make changes to the empty table row at the bottom of the table. If there is no empty row, right-click the last row of the dictionary and select **Insert Row**. 4. Select to activate the key. 5. Click **OK**.
Delete a key value	Delete a dictionary value.	In the Dictionaries widget, right-click a row and select **Delete Row**.
Export data from a dictionary	Export a dictionary as a CSV, Excel, or XML file. D2 downloads the exported file to the selected directory and opens the file.	1. In the Dictionaries widget, right-click a dictionary and select **Export dictionary data**. 2. Select a **File format**. 3. Type the separator character for the exported table if you are exporting in CSV format. 4. Click **Modify**. 5. Select the folder to which you want to save the file, then click **OK**.

Action	Description	To perform this action
View data from a dictionary in a different file format	View a dictionary as a CSV, Excel, or XML file. D2 downloads the exported file to its temporary directory and opens the file in read-only mode.	1. In the Dictionaries widget, right-click a dictionary and select **Export dictionary data**. 2. Select a **File format**. 3. Type the separator character for the exported table if you are viewing in CSV format. 4. Click **View**. The file is saved to the checkout path.
Restore a version	Restore an older version of the dictionary. Using this command sets the older version as the current version. You must restore the later version in order to switch back.	1. In the Dictionaries widget, right-click a dictionary and select **Restore dictionary**. 2. Select a version from the **Dictionary version to restore** list box. 3. Click **OK**.
Save with versioning	Save changes to a dictionary as a different version.	1. In the Dictionaries widget, right-click a dictionary and select **Save dictionary**. 2. Select to either save as the same version, as a minor version update, or as a major version update. 3. Type a description for the changes. 4. Click **OK**.
Update the repository	Update the repository to have dictionary changes take effect. If you do not update the repository, changes to the dictionary do not take place across the repository.	In the Dictionaries widget, right-click the widget and select **Request repository update**.

D2 uses taxonomies to filter and organize values from one or more dictionaries. For example, an administrator can configure a list box in a property page to use a taxonomy. The choices you see in the list box are a specific branch of values in the taxonomy that have been drawn from dictionaries. If you have access to administrator nodes in D2 Client, you can configure and export taxonomies. You cannot create a new taxonomy.

Perform administrator actions on taxonomies using the Taxonomies widget as described in the following table:

Action	Description	To perform this action
Import data into a taxonomy	Import a CSV, Excel, or XML file with data into a taxonomy. Before importing the file, make sure the table is formatted properly: • The column header titles match the names of dictionaries in the D2 repository. • Content in the cells match a term within the dictionary.	1. In the Taxonomies widget, right-click a taxonomy and select **Import taxonomy data**. 2. Click **Browse** and select the data file. 3. If you selected a .csv file, type the separator character used for the table. If you enter an incorrect separator, D2 shows an error message during table import. 4. Select to either **Overwrite taxonomy data** or **Append taxonomy data**. 5. Click **OK**.
Configure key values	Add or remove the values of a dictionary from the taxonomy. You cannot add or remove dictionaries from a taxonomy using the widget.	1. In the Taxonomies widget, right-click a taxonomy and select **Properties**. 2. In the **Available values & structures** section, use list controls to add or remove dictionary keys to and from the taxonomy. 3. Click **OK**.

Action	Description	To perform this action
Export data from a taxonomy	Export a taxonomy as a CSV, Excel, or XML file.	1. In the Taxonomies widget, right-click a taxonomy and select **Export taxonomy data**. 2. Select a **File format**. 3. Type the separator character for the exported table if you are exporting in CSV format. 4. Click **Modify**. 5. Select the folder to which you want to save the file, then click **OK**.
View data from a taxonomy in a different file format	View a taxonomy as a CSV, Excel, or XML file.	1. In the Taxonomies widget, right-click a taxonomy and select **Export taxonomy data**. 2. Select a **File format**. 3. Type the separator character for the exported table if you are viewing in CSV format. 4. Click **View**. The file is saved to the checkout path.
Restore a version	Restore an older version of the taxonomy. Using this command sets the older version as the current version. You must restore the later version in order to switch back.	1. In the Taxonomies widget, right-click a taxonomy and select **Restore taxonomy**. 2. Select a version from the **Taxonomy version to restore** list box. 3. Click **OK**.

Action	Description	To perform this action
Save with versioning	Save changes to a taxonomy as a different version.	1. In the Taxonomies widget, right-click a taxonomy and select **Save taxonomy**. 2. Select to either save as the same version, as a minor version update, or as a major version update. 3. Type a description for the changes. 4. Click **OK**.
Update the repository	Update the repository to have taxonomy changes take effect. If you do not update the repository, changes to the taxonomy do not take place across the repository.	In the Taxonomies widget, right-click the widget and select **Request repository update**.

If you have D2-Bin installed, you can manage the recycle bins of other users for whom you have administration rights, as described in the following table:

Action	Description
Viewing a recycle bin that belongs to another user	1. Select **All recycle bins** from the list box. 2. Double-click the user whose recycle bin you want to access.
Restoring content from the recycle bin to the original location in the repository	Right-click content in the Recycle Bin and select **Restore**.
Permanently removing content from the repository	Right-click content in the Recycle Bin and select **Delete**.
Emptying the recycle bin	Click **Empty Recycle Bin**.

Related Topics —

Configuring User Groups, page 33
Configuring User Profiles, page 30

Configuring User Profiles

1. To configure user account information, click the **Information** tab and fill out the fields as described in the following table:

Field	Description
Username	Type a username. The username is unique and cannot be modified but can be reassigned to another user.
Description	Type a description. You can use any alphanumeric character and standard keyboard symbol. D2 displays HTML tags as a string.
Email address	Type an email address.
User group name	Select the default user group.
Default folder	The field displays the default folder viewed by the user. Leave the field blank when creating a new user.
State	Select the state of the account. The *OpenText Documentum Server Administration Guide* contains further information.

2. To configure the login system for the user, click the **System** tab and fill out the fields as described in the following table:

Field	Description
User source	Select the system for authenticating the user login name and password. The *OpenText Documentum Server Administration Guide* contains further information.
User login	Type a login name.
User domain	Type the domain information shown in the login screen.

3. To configure the account privileges, click the **Profile** tab:

   a. Select default **User privileges** from the list box as described in the following table:

Privilege	Description
None	Cannot receive create privileges. Can receive audit privileges but has none by default.
Create	Can receive create privileges but has none by default. Can receive audit privileges but has none by default.
System Administrator	Always has create privileges. Can receive audit privileges but has none by default.
Superuser	Always has create privileges. Can receive audit privileges but has none by default.

b. Configure specific user privileges as described in the following table:

Privilege	Description
Type	Can create an object type.
Cabinet	Can create a cabinet.
Group	Can create a user group.
Config	Can configure audit trails.
Purge	Can delete audit trails.
View	Can view audit trails.

c. You can select a client capability in the **Client capability** list box.

Documentum client products use the client capability setting to determine the functionality delivered to the user. Documentum Server does not recognize or use the client capability setting.

The *OpenText Documentum Records Client Administration and User Guide* contains further information about the client capabilities.

4. To configure group membership, click the **Group memberships** tab:

a. Click **Select groups** to open the **Groups** dialog box.

b. Use the list controls to add and remove groups.

c. Click **OK**.

d. Select a group and click **Remove group** to remove the user from the group.

5. Click **OK**.

Related Topics —

Understanding Administration Widgets, page 23

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Configuring User Groups, page 33

Configuring User Groups

1. To configure group details, click the **Information** tab and fill out the fields as described in the following table:

Field	Description
Group name	Type a name. You cannot edit this field if you are editing an existing group.
Administration Group	Select a group that can modify this group. This option does not prevent superusers and the group owner from retaining administration rights.
Description	Type a description. You can use any alphanumeric character and standard keyboard symbol. D2 displays HTML tags as a string.

2. To configure the members of the group, click the **Users** tab:
   a. Click **Select users** to open the **Users** dialog box.
   b. Use the list controls to add and remove users.
   c. Click **OK**.
   d. Select a user and click **Remove user** to remove the user from the group.
3. To configure subgroups, click the **Groups** tab:
   a. Click **Select groups** to open the **Groups** dialog box.
   b. Use the list controls to add and remove groups.
   c. Click **OK**.
   d. Select a group and click **Remove group** to remove the group.
4. Click **OK**.

Related Topics —

Understanding Administration Widgets, page 23
Configuring User Profiles, page 30

Configuring User Profiles, page 30

Chapter 5

Navigating and Using D2

Adding a New User or Repository Workspace

1. Right-click **Add workspace**.
2. In the **Authentication** dialog box, for **Repository**, select a repository.
3. In the **Login** field, type your user name.
4. In the **Password** field, type your password.
5. If you have a **Domain** field, type the domain of the repository.
6. Click **OK**.

Related Topics —

Logging In, page 9

Configuring User Preferences

1. Click **User Settings** in the menu bar to open the **User Settings** dialog box.

   Note: If you make changes to any date format, language, row height, or menu position/size setting, D2 automatically reloads your page to execute the changes when you click **OK**. Your current navigated location in D2 is lost when the page is refreshed and you are returned to the root cabinet. Changes that affect content count and folder order will not appear until the doclist is refreshed.

2. Specify the properties in the **General** tab as described in the following table:

Field	Description
Temporary path	Select the directory in which to save viewed files. Viewed files are not checked out. The system deletes files the next time you log in to the system.
Checkout path	Select the directory in which to save checked out files.

Field	Description
Update Browser Plugin	Select the plugin that D2 uses for content transfer functions. See Documentum Content Transfer Framework supported feature list, page 58 for more information on features and browser support. **Note:** Your administrator can define which browser plugins are available in the Update Browser Plugin drop-down list. Some selections might not be available. • **Java**: sets a java applet as the content transfer plugin. • **None**: sets a "thin client" as the content transfer plugin. This is limited native functionality that is available through your browser. • **CTF**: sets the Documentum Client Manager as the content transfer plugin. This is a customized plugin created for your browser.
Date format	Select the date format used for content properties.
Date and time format	Select the date and time format used for widget columns. You can select the **dd/MM/yyyy HH:mm:ss**, **MM/dd/yyyy HH:mm:ss**, or **yyyy/MM/dd HH:mm:ss** format.
Date input format	Specifies the date format for the date picker or date input controls. The supported date formats are **dd/MM/yyyy**, **MM/dd/yyyy**, **yyyy/MM/dd, and YYYY-MM-DD**. The default date input format is determined by locale. For example, if locale is **EN**, the default date input format is **dd/MM/yyyy**, otherwise the default format is **MM/dd/yyyy**.
Default language	Select the default language for the D2 Client user interface. This overrides the web browser language setting. Your system may be configured to hide this field.

Field	Description
Default Workspaces	Select the default workspace(s). You can modify the default workspaces configured by the administrator. The changes will reflect after re-login. Your system may be configured to disable this setting.
Login Settings	**Restore session**: Select to restore your previous workspaces and widget settings for this repository. **Reset application/default workspaces**: Select to set the default workspace settings. The changes will reflect after re-login. Your system may be configured to disable these fields.

3. Fill out the **User Interface** tab as described in the following table:

Field	Description
Content by page	Select the number of items you want to show in each page of a list.
Sorting	Select **Group folders then files** checkbox to enable D2 to sort and group list widget folders first, followed by files. This option is selected automatically if the administrator has configured this setting in the D2 Config.
Table row height	Select the height of a row in a list.
Menu position	Select to position the menu at the left or top of the position. Log out and then log in again to see the change.

4. Fill out the **Events** tab as described in the following table:

Field	Description
Subscription events	Use the list controls to add or remove the subscriptions events for which D2 creates notifications.

5. Click **OK**.

Determining Which Search to Use

Use the following table to determine which search provides you with the desired results:

Name	Description	How	Output location
Quick search	Performs a search in the repository of the current workspace using search terms.	In the Quick search widget, type the search terms in the field. Alternatively, you can perform a search using the quick search toolbar available in the Document list and Thumbnail widgets. Other search options are available in the interface, including limiting the search to the current folder, or switching to advanced search. If administrators configured the search functionality to use the Documentum search engine, click **Highlight** on the search toolbar to highlight search terms shown in the search results.	Document list or Thumbnail widget You cannot drag content out of the doc list widget for search results.
Advanced search	Performs a search in the repository of the current workspace using complex search criteria.	Create, run, save, and load advanced searches. Configuring Advanced Searches contains further information about configuring and running advanced searches.	Document list or Thumbnail widget You cannot drag content out of the doc list widget for search results. **Note:** • Users with consumer role can access the advanced search through the widgets (Document List, Thumbnail, Quick Search, and Saved Search) added to the workspace for the user. • A system administrator can configure groups and assign privilege through the D2 config.

Name	Description	How	Output location
Search form	Performs a search in the repository of the current workspace using a pre-configured search form.	Run an instance of the Search form widget, which is configured for a specific query form.	Document list or Thumbnail widget You cannot drag content out of the doc list widget for search results.
Predefined search	Performs a search in the repository of the current workspace using a previously-defined or saved search.	Using the Searches Widget contains further information about performing searches in the widget.	Document list or Thumbnail widget You cannot drag content out of the doc list widget for search results.
Multirepository search	Performs a search across all connected repositories.	To use multirepository search, perform the following: 1. Login to D2–Client and open a workspace. 2. Right-click on the + icon to display the **New login** dialog box. 3. Select a different repository and type the user name and password. This displays the new workspace for the repository. 4. Click the magnifying glass available in the worksapce navigation area to open the multisearch area, then type the search terms in the field.	Multisearch area

Related Topics —

Understanding Full-Text and Simple Searches, page 41
Using the Searches Widget, page 46

Understanding Search Rating and Results, page 48
Configuring Advanced Searches, page 43
Understanding Full-Text and Simple Searches, page 41
Using the Searches Widget, page 46
Understanding Search Rating and Results, page 48

Understanding Full-Text and Simple Searches

Depending upon how your Administrator configured the search functionality, use the Quick search widget or the Multisearch area to perform a full-text or a simple search. If the search is not configured, neither type returns results. The following table describes the differences between the two types of searches:

Type	Description
Full-text search	Accepts multiple search terms. Searches the metadata and content of repository objects. Administrators can configure the indexing server to include custom metadata in the search scope.
Simple search	Accepts only single-word searches. Searches for the word in content name, title, keywords, and subject.

You can use term modifiers when using a full-text search with any search widget to specify search criteria. Use the following table, listed in order of precedence, to determine which term modifiers can assist your search:

Modifier	Modifier name	Description	Example
`" "`	Exact terms	Searches for an exact match to the terms contained within the quotation marks.	**`OpenText OR Japan`** searches for matches for the terms **`OpenText`**, **`Japan`**, or both. **`"OpenText OR Japan"`** looks for a match consisting of the exact phrase "OpenText or Japan."
`-`	NOT	Excludes content that contain the term following the symbol. Place the minus (-) symbol before the second term.	Searches for content that includes **`OpenText`** but not **`Japan`**: **`OpenText —Japan`**

Modifier	Modifier name	Description	Example
+ or **&**	AND	Matches content where both terms are found. Place the plus (**+**) symbol before the second term.	Searches for content that includes **OpenText** and **Japan**: **OpenText +Japan**
No symbol	OR	Matches content where one or both of the terms are found. Terms separated by spaces automatically use an OR modifier.	Searches for content that includes **OpenText** or **Japan**: **OpenText Japan**

You can modify the scope of term matches by using wildcard symbols.

DQL uses the following wildcards:

Modifier	Modifier name	Description	Example
%	Multi-character wildcard	The percent sign matches 0 or more characters.	**"f%"** matches **f, fo, foo**.
_	Single-character wildcard	The underscore sign matches exactly 1 character.	**"m_"** matches **me**.

xPlore uses the following wildcards :

Note: Refer to xPlore documentation for the fulltexet and metadata wildcard settings.

Modifier	Modifier name	Description	Example
*	Multi-character wildcard	The asterisk sign matches 0 or more characters.	**"f*"** matches **f, fo, foo**.
?	Single-character wildcard	The question mark sign matches 0 or 1 character.	**"appl?"** matches **apple**, **"apple?"** also matches **apple**, but **"app?"** does not match apple.

Related Topics —

Determining Which Search to Use, page 38
Using the Searches Widget, page 46
Understanding Search Rating and Results, page 48
Configuring Advanced Searches, page 43
Determining Which Search to Use, page 38
Using the Searches Widget, page 46
Understanding Search Rating and Results, page 48

Configuring Advanced Searches

1. Open the **Advanced search** dialog box:
   - Create a new advanced search by navigating to **New** > **Advanced search** from the menu bar.
   - Edit an existing advanced search by right-clicking a saved advanced search in a Predefined search widget and selecting **Edit**.
2. To configure the advanced search criteria, on the **Criteria** tab:
   a. Select the content types for the search. The advanced search allows you to narrow the search by selecting properties of the selected types. You can configure for search types to be prepopulated here by default.

      Click **Assistance** to open the **List Assistance** dialog box, use the list controls to add and remove content types, then click **OK**.

   b. To remove a content type, select a type and click **Remove**. If you remove a type, D2 clears all property fields.

   c. To add a row for property-based criteria, click **+**.

   d. For each row, select a **Property**, a **Condition**, and a **Value**.

      The selected content types provide value assistance for the properties list box, and selected property provides value assistance for the condition and value fields. For example, if you select a date property, the conditions become numeric operations and the value becomes a date-picker. If you select a string property, the conditions become string operations and the value becomes a list box.

   e. To remove a row, click **X**.

   f. Create search equations using the **(** and **)** buttons. After you click **)** to close a parenthesis, you can select **`AND`** or **`OR`**. Note that **`AND`** or **`OR`** are only valid when the property criteria has multiple rows you want to connect. The operators have no effect in a single row environment.

   Note: The < > operator works if D2 is configured with Xplore. However, if Xplore is not configured, due to the limitation of the CS DATEFLOOR_LOCAL() function, an error is displayed when the < > operator is used.

3. To configure search options, on the **Criteria** tab select or clear the checkboxes under **Options** as described in the following table:

Search type	Description
All versions	Select if you want to search all versions of content. If you do not select this option, only the current version of content is searched.
Case sensitive	Select to perform a case-sensitive search.

4. To add a full content search, on the **Criteria** tab and under **Full text option**:
   a. Select a search option from the list box.

   b. Type the search terms you want to use for the full-text portion of the search.

      If you select “containing any words“ option, use the required modifier, for example, modifier “+” to represent “AND“ operation. If you do not specify a modifier, then the default is “OR“ operation. The word “AND“ and “OR“ are treated as literal and have no special meaning in this case. This is the same syntax as quick search.

For example, if you want to find the document that contains both words “apple“ and “orange“, you need to use the plus (+) symbol to indicate “AND“ operation. There is no space between the “+“ and the following word, such as apple +orange. If you want to find the document that contains words “apple“ or “orange“, you need to use the syntax, such as apple orange.

Note: We do not recommend to use “AND“, “OR“, “NOT“ as full text search term itself unless it is used with “Containing exact sentence“ search option because they have special meanings in xQuery/DQL.

5. To specify the folders searched, click the **Location(s)** tab:
   a. By default, your entire repository is searched. Perform one of the following tasks to narrow the search location:
      - Click **Current folder** to constrain your search results to the folder you are currently viewing.

        Note: Before you perform a constrained search, make sure a location in the repository tree or your doclist window is selected, or the whole repository will be searched.
      - Click **Folders**, navigate through the folder tree and select the folders you want searched, then click **OK**.

   b. Select **Include sub folders** to include the subfolders of the selected folders.

      When not selected, the search only checks the selected folders.

   c. Select a folder and click **Remove location** to remove the folder from the list.
6. To configure the display settings of the results, click the **Columns** tab:
   a. Click **Select columns**, then use the list controls to add and remove property columns.

      You can use the search field to filter the list.

   b. Use **Move up** and **Move down** to order the selected columns.

   c. In the **Order by** list boxes, select the property and whether to list the results in ascending or descending order.
7. To configure facet values, click the **Facets** tab:
   a. Click **Browse** to open the **Facets** dialog box.

   b. Filter the list of facets configured by administrators and use the list controls to add, remove, and reorder the **Selection** list.

   c. Click **OK**.

   Facets represent one or more important characteristics of an object in the Documentum object model. Configure facets to search large data sets without explicit queries and to avoid queries that do not return desired results.
8. To save the search, click **Save as**:

   Click **Save** to save changes to existing searches. D2 disables the button if any required information is missing or if you did not make any changes.

   a. Type a name for the search in **Search name**.

   b. Select **Public search** to make the search available to other users.

   c. Select **Show search criteria before running** to launch the advanced search dialog box when the search is run using the predefined search widget.

d. Select the location in the search tree to save the search using the **Select where your search will be saved** list.

9. To run the search, click **Run**.

Related Topics —

Determining Which Search to Use, page 38
Understanding Full-Text and Simple Searches, page 41
Using the Searches Widget, page 46
Understanding Search Rating and Results, page 48
Optimizing Advanced Search Processing Speed, page 45

Optimizing Advanced Search Processing Speed

Use the following guidelines to avoid slowdown of search processing speeds.

Multiple types and custom attributes

The execution of quick and advanced searches with DQL can be slower than expected if all three of the following conditions are present:

- Multiple types are included in the search criteria.
- A custom attribute is added to the columns.
- The search result returns a huge data set.

Case Sensitiveness for Non Full-text Search

If D2 is not configured to use a full-text search engine, you may be impacted by case sensitivity when they attempt to perform a search. Each time you create a query, select the **Case sensitive** option to enable case sensitivity. If the option is not selected, the search defaults to being case insensitive and can prevent the use of non-function-based indexes. As a result, the search performs full-table scanning and may slow the search query.

Condition Operators

The following operators slow the search query as ordered from most impact to least impact:

- Does not contain
- Contains
- Ends with
- Begins with

Multiple Object Types

You can search multiple object types with a single DQL query, but this introduces additional overhead because the query uses **`JOIN`** and **`UNION`** operations.

Related Topics

Related Topics —

Configuring Advanced Searches, page 43

Using the Searches Widget

Use the Searches widget to view, edit, and run saved and predefined searches. You can organize searches when saving an advanced search or when an administrator configures a search. The Searches widget shows each search in the respective categories. Modify and navigate searches as described in the following table:

Name	Description
New advanced search	Create and configure an advanced search.
Edit search	Load and configure the current advanced search or the last advanced search that was run.
My last search	Load the last search run of the user session and show the facets for the last unsaved search that was run.
My searches	Shows child nodes for all searches saved by you. If the searches are configured with Facets, clicking a search name runs the search and displays the search results in the facet navigation widget, otherwise the search results will be displayed in the DocList widget.
Public searches	Shows child nodes for all searches saved or configured as public. If the searches are configured with Facets, clicking a search name runs the search and displays the search results in the facet navigation widget, otherwise the search results will be displayed in the DocList widget.
Highlight search terms in the search results	Click the **Highlight** button on the search toolbar to toggle the highlight setting.

You can distinguish between three types of searches using the icons displayed in the widget as described in the following table:

Icon	Name	Description
	Advanced	Performs a highly-specified search that narrows results using object type, attributes, locations, and advanced options such as case-sensitive and asynchronous. Administrators can configure the display settings of the result list and can sort documents by facets for advanced searches.
	DQL	Performs a technical search using Documentum Query Language (DQL).
	Query Form	Performs a search configured by administrators with a specified set of input properties. Query form searches display a content property page as a form for user search specification.

Related Topics —

Determining Which Search to Use, page 38
Understanding Full-Text and Simple Searches, page 41
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Determining Which Search to Use, page 38
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Using the Facets Widget

The faceted navigation includes two components, a **Facets** widget and a breadbox in the doclist and docgallery widgets. The facets widget allows the search refinement in a dynamic facet list. Facets are grouped by category and ordered based on the configuration or advanced search settings. The doclist and the docgallery widgets contain the breadbox to display the facet selections in the same order it was used for refinement. When the facets are ordered by ascending or descending order in the facets widget, the uppercase and lowercase letters are treated with the same weightage. The breadbox is hidden if no facet values are selected or if all the values are cleared.

The facets are categorized as standard and structured facets. The standard facets are single selection facets. The structured facets are hierarchical and are configured in the D2 Config to define their structure.

When a user selects a facet value in the facets widget, all the facets are refreshed, the selected category reflects the selected facet value and removes the other facet values. A new set of facets available for the new results is displayed.

Note: If you have multiple workspaces open, the facets widget for only the workspace you are currently viewing is refreshed after a search is executed. In a workspace with multiple views, facets may refresh across all views in the workspace.

Understanding Search Rating and Results

The search system uses a rating system to rank searches from 1 to 5 stars. The system scores query results using the ranking principles as described in the following table:

Ranking principle	Example
A result is rated higher with a higher frequency of appearance of the search term within the content. The rating is further weighted by content length.	A term appearing 5 times in a 2–page document is a stronger match than a term appearing 8 times in a 30–page document.
A result is rated higher when the search term appears in metadata than when it appears in the content.	Content with the metadata tag **`guideline`** is considered a stronger match than content that has the word **`guideline`** within its text.
If the search term uses an **`OR`** statement, the result is rated higher when both terms are found than content with only one match.	Given a search query for **`dog OR cat`**, an article about animals that includes **`dog`** and **`cat`** is a stronger match than an article about dogs, regardless of how often **`dog`** is used.
More recent content is rated higher.	A guide written a year ago is a stronger match than a guide written three years ago.

Depending on configurations, you may see multiple instances of the same file in the results.

Related Topics —

Determining Which Search to Use, page 38
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Chapter 6

Working with Content

Understanding Content

The following list describes the three types of content handled by Documentum:

- Cabinets are folders located at the highest level of the repository.
- Folders are containers for content and organize the repository.
- Files can be of any format type and include applications, scripts, video files, audio files, and documents.

You can create, import, delete, and manipulate the permissions and properties of content as described in the following table:

Action	To perform this action
Viewing content	Double-click content. If the C2 plug-in is installed and configured, D2 always uses the default C2 configuration when viewing Portable Document Format (PDF) files.
Creating content	Navigate to **New** > **Content** from the menu bar. Creating Content contains further instructions.
Editing content	Right-click content and select **Edit**.
Importing content	You can import content from the file system to the repository. Importing Content contains further instructions.
Importing content as a new version	You can import content as a new version of existing content. Right-click the originating content and select **Import as version**. Importing Content as a New Version contains further instructions.
Exporting content	Right-click content and select **Export**. Exporting Content contains further instructions.
Checking in and checking out content	Right-click content and select **Check in** or **Check out**. Checking In Content contains further information about checkin options.
Deleting content If D2-Bin is installed, D2 moves the content to the recycle bin	Right-click content and select **Delete**. You cannot delete content if the content is part of a virtual document. If you are deleting a branch version, D2 does not move the content to the recycle bin because D2-Bin is not compatible with branch versions.

Action	To perform this action
Renaming content	Right-click content, select **Properties**, modify the content name in the **Name** field, and click **OK**. If you rename content, you do not see the updated name in the **Favorites** widget until you log out and log back in.
Viewing content permissions	Click content and select **Permissions**.
Viewing content properties	Right-click content and select **Properties**. If you have D2 Bin installed and view the properties of content in the recycle bin, D2 can show some properties with incorrect values.
Copying and pasting content	You can copy and paste the content within a single repository or between multiple repositories. 1. Right-click content and select **Copy**. 2. Navigate to the folder to which you want to paste the content. 3. Right-click the folder and select **Paste**. You cannot use copy and paste when an autolink rule is configured because D2 uses the autolink rule to move the content to a specified location. D2 does not copy and paste annotations attached to the original content.
Cutting and pasting content	1. Right-click content and select **Cut**. 2. Navigate to the folder to which you want to paste the content. 3. Right-click the folder and select **Paste**. You cannot use cut and paste when an autolink rule is configured because D2 uses the autolink rule to move the content to a specified location.
Copying and linking content	1. Right-click content and select **Copy**. 2. Navigate to the folder to which you want to paste the content. 3. Right-click the folder and select **Paste as link**. You cannot use copy and paste-as-link when an autolink rule is configured because D2 uses the autolink rule to move the content to a specified location.

You can create, delete, rename, and view the permissions and properties of folders as described in the following table:

Action	To perform this action
Creating a folder	Navigate to **New** > **Folder** from the menu bar.
Importing a folder	Drag and drop a folder from the local file directory to a List widget, then fill out the **Import File** dialog box. Administrators can disable folder import in your implementation of D2.
Exporting a folder and its content	Right-click the folder, select **Export folder**, and select the location in the local file directory to which you want to export.
Deleting a folder	Right-click the folder, select **Delete**, and select one of the options.
Renaming a folder	Right-click the folder, select **Properties**, modify the folder name in the **Name** field, and click **OK**. If you rename a folder, you do not see the updated name in the **Favorites** widget until you log out and log back in.
Viewing folder permissions	Right-click the folder and select **Permissions**.
Viewing folder properties	Right-click the folder and select **Properties**.
Copying a folder using drag and drop	Drag and drop a folder to a selected folder. D2 copies all the content within the folder along with its subfolders. You can drag and drop a folder within a single repository or between multiple repositories.

If you want to create cabinets, navigate to the repository root, as described in the following table:

Action	To perform this action
Creating a cabinet	Navigate to the repository root and click **New** > **Cabinet**.

In addition to using widgets to browse content, you can also use actions, as described in the following table:

Action	Description
Convert to virtual document	Right-click content and select **Convert to Virtual Document**. This action converts the selected content to a virtual document parent. Understanding Virtual Documents contains more information about using virtual documents.
Locate	Right-click content and select **Locate**. The action automatically navigates the Document list widget to the folder containing the selected content. **Note:** Folder access might be limited by permissions. Restricted folders will not appear in the browser tree window. If you have breadcrumbs turned on in the Document list, restricted folders are identified as (**...**). For example: `REPO/CAB/Folder1/.../Folder4/fileObject`.
Comment	Select content and open an instance of the Comment widget.
Favorite	Right-click content and select **Add to favorites**. The action toggles the visibility of the content in the Favorites widget within the Content Assistance dialog (if configured by your administrator).
Subscribe	1. Right-click content and select **Subscribe**. If you selected multiple content, D2 might disable **Subscribe** depending on configurations to prevent subscription event conflicts between one or more of the content. 2. Use the list controls to add or remove subscription events to receive notifications. You can configure the way you receive notifications in your user preferences. If you selected multiple content, the dialog box shows an empty list of events even if you had previously added events. D2 applies the list of events to all selected content and replaces previous configurations. 3. Click **OK**.

Action	Description
Send email	Right-click content and select **Send email**, then fill out the form and click **Send**. Sending Content by email from D2 contains further instructions on sending content by email from the D2 interface.
Copy link to clipboard	Right-click content and select **Copy link to clipboard**.
Lifecycle	Right-click content, select **Lifecycle**, and then select the lifecycle action you want to perform. Understanding Lifecycles contains more information about using lifecycles.
Send to Workflow	Right-click content, select **Workflow**, and then select the workflow through which you want to pass the content. Understanding Workflows contains more information about using workflows.
Distribution	Right-click content, select **Distributions**, and then select the distribution through which you want to send the content. Understanding Distributions contains more information about using distributions.
Mass update	1. Right-click content, select **Mass update**, then select the mass update process you want to configure and run. 2. Fill out the properties form for the mass update process. 3. Click **OK**.
Filter	Filter content in the Document list widget using the filter list box next to the menu. Filters do not affect search results.

If you have C2 installed, you can use functionality specific to PDF content, as described in the following table:

Action	Description
Viewing through C2	Right-click content, select **View through C2**, and select a view configuration.
Exporting through C2	Right-click content, select **Export through C2**, select a location, then click **OK**.

Action	Description
Printing through C2	1. Right-click content and navigate to **Print through C2**, then select a C2 print configuration and printer. 2. Fill out the form and click **OK**.
Recalling a controlled print	1. Right-click content and navigate to **Print through C2** > **Recall print** from the menu bar. 2. Select the **Recipient** and type the **Reason for recall**, then click **OK**. The list of recipients reflects the list of users entered in the controlled print dialog box.

If you have D2-Bin installed, content is moved to the recycle bin upon deletion and you can use functionality specific to the Recycle Bin widget, as described in the following table:

Action	Description
Restoring content from the recycle bin to the original location in the repository	Right-click content in the Recycle Bin and select **Restore**.
Permanently removing content from the repository	Right-click content in the Recycle Bin and select **Delete**. **Note:** The **Delete all versions** option in the Recycle Bin widget deletes only the selected versions.
Emptying the recycle bin	Click **Empty Recycle Bin**.

Related Topics —

Using Intelligent URLs to Interact with Content, page 90
Checking In Content, page 75
Creating Content, page 55
Exporting Content, page 74
Importing Content, page 60
Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70
Understanding Virtual Documents, page 82
Understanding Lifecycles, page 119
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Understanding Properties, page 76
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Understanding Renditions, page 80
Understanding Comments, page 89
Understanding Distributions, page 128
Understanding Virtual Documents, page 82

Understanding Why Content was Renamed or Moved, page 78

Creating Content

If only one option is available for a step, the content creation wizard automatically selects the option and proceeds to the next step.

1. Navigate to **New** > **Content** from the menu bar.

   Note: New menu option is disabled for users with client capability as `Consumer`.

2. On the **Fill creation profile** page:

   a. Select a **Creation profile** from the list box.

      Note: If the Creation profile you selected is associated with a workflow, the document you created is sent to the workflow automatically at the end of this process, unless you clear the **Launch workflow automatically following content creation** checkbox on the Workflow dialog.

   b. Select a **Document type** from the list box.

   c. If you want to inherit properties, fill out the **Inheritance** form as described in the following table:

Field	Description
Source	If you are using D2 Client 3.1, click **Browse**, select the content from which you want to inherit, and click **OK**.
Properties	Select to inherit properties.
Content	Select to inherit non-property content.

   d. Click **Next**.

3. On the **Edit properties** page, fill out the properties form and click **Next**.

   Note: The **File Under** field allows you to create subfolder targets for your content, for example: `ABC/test1/test2`. These subfolders are created but Security and Default Value Templates designated in AutoLink are not applied to the folders.

   Note: In case of multiple panels property page, the labels of the panels are indented below the **Edit Properties** label in the left column. Users can navigate to each of the property panels using the **Next** or **Back** buttons. The properties are validated at each step.

4. On the top of the **Choose template** page you can switch from Gallery View to List View to choose your template, or filter the available templates by Name, Title, or Subject. The List View includes a **Subject** column that may offer further details about the template. Click a template to continue.

5. Determine if you need to create a linked document. The template page contains buttons that change depending on the combination of the selected creation profile and the content properties. You can:
   - Click **Create Linked Document** or **Next**. Go to step 6.
   - Click **Edit Main Content** or **Edit Content** to make changes to the content being created before checking it in to the repository. Go to step 7.
   - Click **Check In and Finish** to check in the content without making changes. Go to step 8.
6. Create a linked document:
   a. On the **Fill creation profile** page, select a **Creation profile** and a **Document type**.

   b. On the **Edit properties** page, fill out the properties of the linked document.

   Note: In case of multiple panels property page, the labels of the panels are indented below the **Edit Properties** label in the left column. Users can navigate to each of the property panels using the **Next** or **Back** buttons. The properties are validated at each step.

   c. On the top of the **Choose template** page you can switch from Gallery View to List View to choose your template, or filter the available templates by Name, Title, or Subject. The List View includes a **Subject** column that may offer further details about the template. Click a template to continue.

   d. Click **Next**.
7. Save the content after making changes, then click **Check In and Finish**.
8. Finish checking in content:
   a. Select the version of the content on the **General** tab.

   b. Fill out the **Options** tab as configured by administrations as described in the following table:

Field	Description
Set as current version	Select to set the content as the current version.
Retain lock in repository	Leave this field blank.
Checkin from file	Leave this field blank.
Format	Select the file format of the content.

   D2 performs checkout and checkin automatically as according to configurations.

   c. Click **Check In and Finish** to confirm checkin.

   Depending on your configuration, D2 creates the file in a folder as described in the following table:

If you have	Content is placed
An autolink rule set for the created content.	In a folder, as indicated by the autolink rule. Understanding Why Content was Renamed or Moved contains further information.
No autolink rule set and selected or opened a folder in the active widget.	In the selected folder.
No autolink rule set and no folder selected or opened in the active widget.	In the home cabinet.

Contact an administrator if you receive the error message **`Checkin from file is not allowed`**.

Related Topics —

Understanding Content, page 49
Using Intelligent URLs to Interact with Content, page 90
Checking In Content, page 75
Exporting Content, page 74
Importing Content, page 60
Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70
Checking In Content, page 75
Exporting Content, page 74
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Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70

Documentum Content Transfer Framework supported feature list

D2 Action	Java applet behavior	Thin client behavior	Documentum Client Manager browser extension (ctf) behavior
User experience during file edit and check-in	When using the applet, D2 relies upon a pre-set directory for checkout, seamlessly downloads a file to that directory, and opens it for editing. On check-in, D2 looks in the same directory and uploads the file without prompting the user to find it.	D2 uses standard browser file download, so a user is typically prompted to open or save the file. The exact behavior depends on the browser. During check-in, the user is prompted to locate the file before the upload.	Supported in Chrome Supported in Firefox Supported in Internet Explorer Supported in Safari
Folder Export	Supports	No support	Supported in Chrome Supported in Firefox Supported in Internet Explorer Supported in Safari
Copy link in clipboard	Supports copying HTTP links to content into the desktop clipboard	No support	Supported in Chrome Supported in Firefox Supported in Internet Explorer Supported in Safari
Native annotations	Supported in Chrome Supported in Firefox Supported in Internet Explorer	No support	Supported in Chrome Supported in Firefox Supported in Internet Explorer
File comparison for MS Office documents	Supported in Chrome Supported in Firefox Supported in Internet Explorer	No support	Supported in Chrome Supported in Firefox Supported in Internet Explorer

D2 Action	Java applet behavior	Thin client behavior	Documentum Client Manager browser extension (ctf) behavior
Folder Import	Imports a folder structure including the folder's content and sub-folders from the local file system into a repository.	No support	Supported in Chrome Supported in Firefox Supported in Internet Explorer Supported in Safari
Folder drag-in from desktop	Supports	No support	No support
File drag-in from desktop	Supported using java applet integration with Windows desktop. Since there is no such support for the Mac desktop, however, Safari/Mac OSX is supported through standard HTML5 thin client drag and drop and file upload functionality.	Supported through standard HTML5 thin client drag and drop and file upload functionality.	Supported through standard HTML5 thin client drag and drop and file upload functionality, not through CTF. Browser extensions cannot be used to intercept drop operations on a web page.
File drag-out to desktop	No support	No support	Supported in Internet Explorer (through ActiveX)
File drag-in from MS Outlook (emails, emails with attachments, or just attachments)	Supported in Chrome Supported in Firefox Supported in Internet Explorer Choose the email item, drag the attachment into the D2 application.	No support	Supported in Chrome Supported in Firefox Supported in Internet Explorer Select the email item, click the attachment in the email, then drag the attachment from the email into the D2 application.
File compression during content transfer	Supports	No support for upload. Support for download via D2 app server, but not when transfer uses ACS or BOCS.	No support

D2 Action	Java applet behavior	Thin client behavior	Documentum Client Manager browser extension (ctf) behavior
D2Link for Advanced Publishing	Supports	No support	No support
Parallel Streaming Download from ACS/BOCS	Supports	No support	Supports
Bulk import of files with supporting XML files to populate properties (Creating an XML File to Fill Properties During Import, page 73)	Supports	No support	Supports

Importing Content

If only one option is available for a step, the content creation wizard automatically selects the option and proceeds to the next step.

1. Navigate to **Import** > **File** from the menu bar.

   Note: Import menu option is disabled for users with client capability as `Consumer`.

   You can also drag and drop content from the file system to an active widget.

2. On the **Select Files** page:
   a. Click **Browse** and add one or more content to import. If you created an XML file to import properties, you do not need to select the XML for import because D2 automatically locates and relates XML files with the same filename. Creating an XML File to Fill Properties During Import contains further information about creating and configuring the XML files.

   b. Select a file format for the content being imported.

   c. Select **Same creation profile for all files** and **Same properties for all files** to use the same creation profile and properties for all files being imported.

      When these options are selected, only the first file being imported is checked for an applicable XML file for property import.

      Note: Relationships are not inherited for the selected documents when these options are selected.

3. On the **Fill creation profile** page:
   a. Select a **Creation profile** from the list box.

      Note: If the Creation profile you selected is associated with a workflow, the document you created is sent to the workflow automatically at the end of this process, unless you clear the **Launch workflow automatically following content creation** checkbox on the Workflow dialog.

b. Select a **Document type** from the list box.

c. If you want to inherit properties, fill out the **Inheritance** form as described in the following table:

Field	Description
Source	Click **Browse**, select the content from which you want to inherit, and click **OK**.
Properties	Select to inherit properties. **Note:** Relationships are not inherited for the selected documents when **Same creation profile and properties for all files** is selected. If you have the O2 plug-in installed and the imported content has an associated O2 configuration, the content automatically inherits properties as configured by administrators. Properties inherited from content selected in **Source** have higher inheritance priority than properties inherited through O2.
Content	Select to inherit non-property content.

D2 assigns values to properties according to the following order of priorities:

a. Manual input

b. Properties from an XML file

c. Values from inheritance

d. Default values

d. Select **Same creation profile for all files** and **Same properties for all files** to use the same creation profile and properties for all files being imported.

e. Click **Next**.

4. On the **Edit properties** page, fill out the properties form.

5. Determine if you need to create a linked document. The template page contains buttons that change depending on the combination of the selected creation profile and the content properties. You can:

   - Click **Create Linked Document** or **Next**. Go to step 6.
   - Click **Edit Main Content** or **Edit Content** to make changes to the content being created before checking it in to the repository. Go to step 7.

     If you select **Edit Content** when importing multiple content, D2 automatically moves to content checkin.
   - Click **Check In and Finish** to check in the content without making changes. Go to step 8.

6. Create a linked document:

   a. On the **Fill creation profile** page, select a **Creation profile** and a **Document type**.

b. On the **Edit properties** page, fill out the properties of the linked document.

   Note: In case of multiple panels property page, the labels of the panels are indented below the **Edit Properties** label in the left column. Users can navigate to each of the property panels using the **Next** or **Back** buttons. The properties are validated at each step.

c. On the top of the **Choose template** page you can switch from Gallery View to List View to choose your template, or filter the available templates by Name, Title, or Subject. The List View includes a **Subject** column that may offer further details about the template. Click a template to continue.

d. Click **Next**.

7. Save the content after making changes, then click **Check In and Finish**.

8. Finish checking in content:

   a. Select the version of the content on the **General** tab.

   b. Fill out the **Options** tab as configured by administrations as described in the following table:

Field	Description
Set as current version	Select to set the content as the current version.
Retain lock in repository	Leave this field blank.
Checkin from file	Leave this field blank.
Format	Select the file format of the content.

   D2 performs checkout and checkin automatically as according to configurations.

   c. Click **Check In and Finish** to confirm checkin.

   Depending on your configuration, D2 creates the file in a folder as described in the following table:

If you have	Content is placed
An autolink rule set for the created content.	In a folder, as indicated by the autolink rule. Understanding Why Content was Renamed or Moved contains further information.
No autolink rule set and selected or opened a folder in the active widget.	In the selected folder.
No autolink rule set and no folder selected or opened in the active widget.	In the home cabinet.

   Contact an administrator if you receive the error message **`Checkin from file is not allowed`**.

Related Topics —

Understanding Content, page 49
Using Intelligent URLs to Interact with Content, page 90
Checking In Content, page 75
Creating Content, page 55
Exporting Content, page 74

Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70
Creating an XML File to Fill Properties During Import, page 73
Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70
Checking In Content, page 75
Creating Content, page 55
Exporting Content, page 74
Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70

Importing a Folder Structure

You can import a folder structure including the folder's content and subfolders from your local hard drive into a Docbase. In addition, you can have the newly imported folder structure automatically converted to a virtual document. To do so, the folder structure import must be configured in D2-Config for the signed-in users.

Note:

- This option is not available in the thin client mode.
- When importing a folder structure, the files always get uploaded through the D2 application server even if D2-BOCS is configured for use.

1. Navigate to **Import** > **Folder Structure** from the menu bar.
2. On the **Select Folder** page:
   a. Click **Browse** and add one or more content to import.
   b. Select **Import structure** for the content being imported.
      If the selected import structure is configured to include the option to convert folder structure to virtual document automatically after import, then a text is displayed to inform the user that a virtual document will also be created after importing the folder structure. The virtual document will be automatically created using the first object in the parent folder as its root.
   c. Click **Next**.
3. On the **Fill creation profile** page:
   Note: The **Creation profile** will be populated based on the configuration settings for the user.
   a. Select a **Document type** from the list box.
   b. If you want to inherit properties, fill out the **Inheritance** form as described in the following table:

Field	Description
Source content	If you are using D2 Client 3.1, click **Browse**, select the content from which you want to inherit, and click **OK**.
Properties	Select to inherit properties.

D2 assigns values to properties according to the following order of priorities:

a. Manual input
b. Values from inheritance
c. Default values

c. Click **Next**.

4. On the **Edit properties** page, fill out the properties form.
5. Click **Check In and Finish** to confirm checkin.

Copying and Pasting Content between Repositories

You can copy and paste one or more files or folders within a single repository or between multiple repositories. In case of copying and pasting a folder, D2 copies all the folder content along with its folder structure and subfolders to the target repository. If you drag the content and drop it to a target repository tab, the location where the content will be copied is determined by the auto linking configuration. If the auto linking is not configured, then the content is copied to the user's home cabinet.

1. In the **Repository browser** widget, navigate to the folder containing the content.
2. Right-click the content and select **Copy**.
3. In the **Repository browser** widget, select the target repository and navigate to the folder to which you want to paste the content.
4. Right-click the folder and select **Paste**.

If the creation profile does not exist for a content during a single or multiple repository copy and paste operation and the doctype of the copied object exists in the target repository, the object is copied as is without any changes. If the doctype of the copied object does not exist, then the content import wizard appears, and you need to follow the same steps of importing a new content.

Understanding Paste as Link Action in Multiple Repositories

You can copy the content from one repository and link that content into another repository using **Paste as link** option. The linked object refers to the master object in the source repository and any updates made to the master object are mirrored to the linked object. Similarly, any updates made to the linked object are mirrored to the master object.

The linked object has the following characteristics:

- The linked object contains only the metadata of the master object, and does not actually contain the content.
- The linked object uses the configuration of the source repository.

- If you checkout a linked object, the master object also gets checked out.
- The linked object supports version control, the linked directory opens the latest version of the content.
- The linked object properties are governed by the source repository it is linked from.
- If the properties of the master object are updated, then the properties of the linked object reflect the changes. You can edit the properties of a linked object using the Properties widget in the target repository (where the link object resides) and the properties are updated on the master object accordingly.
- If the master object was attached to a lifecycle at the time of copy, then the linked object also appears as part of the lifecycle and can be advanced through the lifecycle of the source repository.
- You can attach a linked object to a lifecycle within the linked repository.
- You can send the linked object to a workflow contained within the linked repository.
- All linked objects have an icon that shows the user that they are linked objects.
- You can add a linked object to the workflow that originates from the linked repository, and not from the source repository.
- You can right-click on the linked object and select the **Go To Source** option to navigate to the master object in the source repository.
- You can right-click on the linked object and select the **Refresh link** option to refresh the link with any changes applied to the master object.
- A linked object can be subscribed or marked as favorite.
- If you delete the linked object from the linked repository, the D2–Bin does not retain any information about the deleted object, and the audit is also deleted. When deleting linked objects in the linked repository, you can choose to delete only the latest link or all the links.
- If you select a linked folder in the linked repository, you will be redirected to the master repository to view the content of the folder.

There are some limitations with the linked content:

- Linked virtual documents are read only in the linked repository. You cannot add or remove child to the linked virtual documents in the linked repository.
- Mass update is not permitted for the linked objects.
- Auto linking is not applied to the linked object.
- You cannot use context menus with the multiple selected linked objects, or combination of linked and master objects.
- You can add comments to the linked object, but cannot delete comments.
- You cannot drag and drop links from Favorites widget and Search results.

Copying and Linking Content between Repositories

Make sure that the Documentum Server has more than one repositories and all the repositories have same users created with the same credentials.

To copy and link content from one repository to another:

1. In the **Repository browser** widget, select the source repository and navigate to the folder containing the content.
2. Right-click the content in the source repository and select **Copy**.
3. Right-click the **+** sign on Workspace tab level.
4. Select the target repository and login using appropriate credentials.

   If Workspace is not set already, select Workspace for the repository and login.
5. Navigate to the folder to which you want to link the content, right-click the folder and select **Paste as link** to create the linked object.

You can also use drag and drop functionality to copy and link the content between repositories. To do so, select the object in the source repository, drag the object to the target repository, press **ALT** and drop it to the target repository.

Note: You cannot drag and drop links from Favorites widget and Search results. However, you can use keyboard actions to copy and paste content as a link.

Copying Content from D2 to Desktop using Drag and Drop

D2 allows you to copy content from D2 to your desktop using the drag and drop functionality. You can drag one or more documents from D2 to your local desktop, provided your D2 administrator has enabled this functionality. The only compatible browser is Microsoft Internet Explorer and requires an ActiveX plugin.

If the D2 ActiveX plugin is not already installed, upon first accessing the D2 URL, Internet Explorer will prompt you to install the WdkPluginCab.cab add-on. To install this add-on:

1. On D2 Client login screen, click **Install** to begin the installation of the WdkPluginCab.CAB add-on.

   Note: User must have administrator privileges on the machine in order to install the ActiveX plugin.
2. Select **Yes** to any other prompts.

   The plugin will be installed on your machine.
3. To verify the installation of the plugin, select **Tools** > **Manage Add-Ons**.

   The plugin is listed as **DmDragDrop Class**.

Drag and Drop Behaviors

The following table lists the Drag and Drop functionality in the various content transfer modes:

Action	Target	Thin Client [1]	Java Applet Client/ Documentum Client Manager Browser Extension[1]	IE With ActiveX [2]
SHIFT-CTRL -DRAG (WIN) SHIFT-OPTION -DRAG (OSX)	Intra workspace drag and drop	N/A	N/A	N/A
	Inter Repository	N/A	N/A	N/A
	Widget to desktop	Creates a linked shortcut file on the local file directory to the object	Creates a linked shortcut file on the local file directory to the object	Creates a copy of the file on the local file directory
CTRL-Drag (WIN) OPTION-Drag (OSX)	Intra workspace drag and drop	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Inter Repository	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Widget to desktop	N/A	N/A	N/A
Drag then CTRL (WIN) Drag then OPTION (OSX)	Intra workspace drag and drop	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Inter Repository	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Widget to desktop	N/A	N/A	N/A
Drag then SHIFT-CTRL (WIN) Drag then SHIFT-OPTION (OSX)	Intra workspace drag and drop	N/A	N/A	N/A
	Inter Repository	N/A	N/A	N/A
	Widget to desktop	N/A	N/A	N/A
SHIFT-ALT-DRAG (WIN) SHIFT-CMD -DRAG (OSX)	Intra workspace drag and drop	N/A	N/A	N/A
	Inter Repository	N/A	N/A	N/A
	Widget to desktop	Creates a linked shortcut file on the local file directory to the object (except Firefox and Safari)	Creates a linked shortcut file on the local file directory to the object (except Firefox and Safari)	Creates a linked shortcut file on the local file directory to the object

Action	Target	Thin Client [1]	Java Applet Client/ Documentum Client Manager Browser Extension[1]	IE With ActiveX [2]
ALT-Drag (WIN) CMD-Drag (OSX)	Intra workspace drag and drop	Creates a link to the source object	Creates a link to the source object	Creates a link to the source object
	Inter Repository	Creates a link to the source object	Creates a link to the source object	Creates a link to the source object
	Widget to desktop	N/A	N/A	N/A
Drag then ALT (WIN) Drag then CMD (OSX)	Intra workspace drag and drop	Creates a link to the source object	Creates a link to the source object	Creates a link to the source object
	Inter-workspace	N/A	N/A	N/A
	Widget to desktop	N/A	N/A	N/A
Drag then SHIFT-ALT (WIN) Drag then SHIFT-CMD (OSX)	Intra workspace drag and drop	N/A	N/A	N/A
	Inter-workspace	N/A	N/A	N/A
	Widget to desktop	N/A	N/A	N/A
SHIFT-Drag (WIN) SHIFT-Drag (OSX)	Intra workspace drag and drop	Moves the object	Moves the object	Moves the object
	Inter Repository	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Widget to desktop	N/A	N/A	N/A
Drag then SHIFT (WIN) Drag then SHIFT (OSX)	Intra workspace drag and drop	Moves the object	Moves the object	Moves the object
	Inter Repository	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Widget to desktop	N/A	N/A	N/A
Drag (WIN) Drag (OSX)	Intra workspace drag and drop	Moves the object	Moves the object	Moves the object
	Inter Repository	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object
	Widget to desktop	N/A	N/A	N/A
	Desktop to widget	Creates a copy of the object	Creates a copy of the object	Creates a copy of the object

The following widgets allows you to create a link to the local file directory:

- Doclist
- Document gallery
- Versions

- Checkout
- Favorites
- Tasks
- Task attachment

Note: Only the Doclist widget allows you to copy a file to the local file directory.

[1] You can drag and drop only one at a time when you perform a link action to the desktop.

[2] You can drag and drop only one at a time when you perform a link action to the desktop. You can drag and drop multiple files when you perform a copy action to the desktop.

Note: D2 does not support the drag and drop of the following system files:

- XML documents
- Virtual documents
- OLE compound documents

Importing Content as a New Version

You can import content as a new version of content that exists in the repository. You can use content with a different file name or different file format.

1. In the **Repository browser** widget, navigate to the folder containing the content for which you want to import a new version.
2. Select the content and navigate to **Import** > **New version** from the menu bar.
3. Navigate to and select the new version of the content, then click **OK**.
4. On the **General** tab, select the content version and add a description.
5. D2 performs checkout and checkin automatically as according to configurations.
   a. Fill out the **Options** tab as configured by administrations as described in the following table:

Field	Description
Set as current version	Select to set the content as the current version.
Retain lock in repository	Select to keep the content checked out after the initial checkin.
Checkin from file	Select a file to check in. By default, this field is populated by the content you selected in step 3.
Format	Select the file format of the content.

   b. Click **OK**. Contact an administrator if you receive the error message **`Checkin from file is not allowed`**.

Related Topics —

Understanding Content, page 49
Using Intelligent URLs to Interact with Content, page 90
Checking In Content, page 75
Creating Content, page 55
Exporting Content, page 74
Importing Content, page 60
Importing an Email and Attachments, page 70
Creating an XML File to Fill Properties During Import, page 73
Importing Content, page 60
Importing an Email and Attachments, page 70
Checking In Content, page 75
Creating Content, page 55
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Importing an Email and Attachments, page 70

Importing an Email and Attachments

Note: D2 does not currently support the extraction of emails that are themselves included in messages as attachments. This limitation does not affect file attachments, which can be extracted as expected.

1. Export an .eml file using your email client.
2. Drag and drop the .eml file to a browser or list widget to open the **Import file** dialog box.

   D2 shows a notification error if you try to:

   - Drag and drop an email and a non-email file together.
   - Import an email with another email attached.
3. On the **Select files** page, confirm the files you want to import and the selected file formats.
4. On the **Fill creation profile** page:
   a. Select a **Creation profile** from the list box.
   b. Select a **Document type** from the list box.
   c. If you want to inherit properties, fill out the **Inheritance** form as described in the following table:

Field	Description
Source content	When you are using D2 Client 3.1, click **Browse**, select the content from which you want to inherit, and click **OK**.
Properties	Select to inherit properties. The content automatically inherits properties as configured by administrators when the O2 plugin is installed, and the imported content has an associated O2 configuration. Properties inherited from content selected in **Source** have higher inheritance priority than properties inherited through O2.

D2 assigns values to properties according to the following order of priorities:

a. Manual input

b. Properties from an XML file

c. Values from inheritance

d. Default values

d. Click **Next**.

5. On the **Edit properties** page, fill out the properties form.

6. Determine if you need to create a linked document. The template page contains buttons that change depending on the combination of the selected creation profile and the content properties. You can:

   - Click **Create Linked Document** or **Next**. Go to step 7.
   - Click **Edit Main Content** or **Edit Content** to make changes to the content being created before checking it in to the repository. Go to step 9.
   - Click **Check In and Finish** to check in the content without making changes. Go to step 10.

7. Create a linked document:

   a. On the **Fill creation profile** page, select a **Creation profile** and a **Document type**.

   b. On the **Edit properties** page, fill out the properties of the linked document.

   c. On the **Choose template** page, select a template for the linked document.

   d. Click **Next**.

8. Configure the import of attachments. Depending on administrator configurations, D2 imports attachments as a related document to the email, as components of the email as a virtual document, or both. You cannot import attached emails.

   a. On the **Attachments** page, select the checkbox next to the attachments you want to import and select the file type for each attachment.

      Select **Same properties for all files** if you want to use the same properties for each attachment.

   b. On the **Fill creation profile** page, select a **Creation profile** and a **Document type**.

c. On the **Edit properties** page, fill out the properties of the linked document.

d. Click **Check In and Finish** to import and check in the email and attachments without making changes. Go to step 11.

e. Click **Next**.

9. Save the email after making changes, then click **Check In and Finish**.

10. Check in the email:

a. Select the version of the email on the **General** tab.

b. Fill out the **Options** tab as configured by administrations as described in the following table:

Field	Description
Set as current version	Select to set the content as the current version.
Retain lock in repository	Leave this field blank.
Checkin from file	Leave this field blank.
Format	Select the file format of the content.

D2 performs checkout and checkin automatically as according to configurations.

c. Click **Check In and Finish** to confirm checkin.

Depending on your configuration, D2 creates the email in a folder as described in the following table:

If you have	Content is placed
An autolink rule set for the created content.	In a folder, as indicated by the autolink rule. Understanding Why Content was Renamed or Moved, page 78.
No autolink rule set and selected or opened a folder in the active widget.	In the selected folder.
No autolink rule set and no folder selected or opened in the active widget.	In the home cabinet.

Contact an administrator if you receive the error message **`Checkin from file is not allowed`**.

Related Topics —

Understanding Content, page 49
Using Intelligent URLs to Interact with Content, page 90
Checking In Content, page 75
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Creating an XML File to Fill Properties During Import

You can create an XML file and place it in the same folder as the imported content to fill content properties during import. The XML file must follow these rules:

- Filename: Make the filename of the XML identical to the content being imported except for the file extension. D2 automatically looks for an XML file with the same filename during content import. For example, when importing **content.ppt** you would create **content.xml**

  If you are importing an XML file, use the **-meta.xml** file extension. For example, when importing **presentation.xml** you would create **presentation-meta.xml**

- **<d2_import_xml>**: Place all property tags within the **<d2_import_xml>** tag.
- **<property name>**: Create tags named according to the property name and the property value inside. For example, **<title>Content Title</title>**
- You cannot transfer read-only properties, with the exception of **r_object_type**, from an XML file.

The following is an example of an XML file:

```
<?xml version="1.0" encoding="UTF-8"?>
<d2_import_xml>  <!-- This is the Root node -->
   <object_name>
      MyDocument
   </object_name>
   <title>
      Testing
   </title>
   <subject>
      To demo automatic transfer
   </subject>
   <keywords>  <!-- use the value tag within a repeating
                    property to set repeating property values -->
      <value>
         Testing1
      </value>
      <value>
         Testing2
      </value>
   </keywords>
   <r_modified_date format="DD/MM/YYYY HH:mm:ss">
      21/05/2013 07:34:45
   </r_modified_date> <!- use the format tag for date properties -->
</d2_import_xml>
```

Related Topics —

Importing Content, page 60

Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70

Exporting Content

1. In the **Repository browser** widget, navigate to the folder containing the content.
2. Select content to export:

Action	To perform this action
Exporting content from the repository	Select the List widget, and click the content.
Exporting content that is checked out	Select the Checkout widget, and click the content.
Exporting content from your favorites	Select the Favorites widget, and click the content.
Exporting a version of content	Select the content in the List widget, and then select the content version in the Versions widget.
Exporting a rendition of content	Select the content in the List widget, and then select the content rendition in the Renditions widget.
Exporting a relation of content	Select the content in the List widget, and then select the content relation in the Relations widget.
Exporting a Virtual Document	Select the content in the List widget, and then select the content in the Virtual Document widget.

3. Click **Content** > **Export**.
4. Navigate to the folder to which you want to export the file, type the file name for the exported content, and click **Open**.

   Note: If the content transfer browser plugin is set to **Documentum Client Manager** and you attempt to export content that has the same name as content in the destination folder, the client will not overwrite the existing content. Your exported content is saved and the file name is appended with a numerical identifier.

Related Topics —

Understanding Content, page 49
Using Intelligent URLs to Interact with Content, page 90
Checking In Content, page 75
Creating Content, page 55
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Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70
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Checking In Content

1. In the **Repository browser** widget, navigate to the folder into which to check in the content.
2. Right-click the content and select **Check in**.
3. On the **General** tab, select the content version and add a description.
4. D2 performs checkout and check-in automatically as according to configurations.
   a. Fill out the **Options** tab as configured by administrations as described in the following table:

Field	Description
Set as current version	Select to set the content as the current version.
Retain lock in repository	Select to keep the content checked out after the initial check-in.
Check in from file	Select a file to check in. By default, this field is populated by the content you selected in step 3.
Format	Select the file format of the content.

   b. Click **OK**. Contact an administrator if you receive the error message **`Check in from file is not allowed`**.

   If administrator has configured property pages to be displayed during check-in, you will see a **Next** button in place of **OK**. Click **Next** to display the configured property page in the Check-In dialog. Click **Check In** to complete the process with property updates.

   Note: D2 displays the check-in versions fetched from the Documentum Foundation Classes (DFC).

Related Topics —

Understanding Content, page 49
Using Intelligent URLs to Interact with Content, page 90
Creating Content, page 55
Exporting Content, page 74
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Understanding Properties

You can view and change content properties to control content relationships, automated behavior, the ability to find content in a search, and so on. For example, administrators can configure D2 such that content with the documentation keyword would automatically be processed as documentation. You can create or import content as a draft and then convert the content for processing as documentation. To do this, you can edit the properties of the content.

Administrators configure and create default property templates and property pages. You assign default properties and property fields to content by selecting a creation profile during content import or creation.

There are two ways you can view properties. You can select content in the Document list widget with the Properties widget visible. You can right-click content and select Properties in the context menu to show the Properties dialog box. You can edit a property page either from the Properties dialog or from the Property widget.

There are two ways you can view properties. You can select content in the Document list widget with the Properties widget visible. You can right-click content and select Properties in the context menu to show the Properties dialog box. The Properties dialog or widget contains single or multiple panels based on the property page configuration. You can edit a property page either from the Properties dialog or from the Property widget. While editing properties in multiple panels, remember to save the changes before navigating to a different panel.

Depending on how the property was configured, you may also need to complete an electronic signature to save a property.

If you filter the list of values in an editable combo field and D2 does not find any matching values, the behavior of the filter depends on the type of DQL query configured by administrators:

- If the combo field uses a simple DQL query, the combo field shows all values from the DQL query.
- If the combo field uses a dependent DQL query, the combo field only shows the text you typed.

Note: The combo field drops down the list and filters when you press the **Down** arrow. To force re-filtering when the drop down is already shown, press **Shift** + **Down** arrow. Pressing **F2** will restore the filter that you just typed.

Related Topics —

Understanding Content, page 49

Understanding Permissions

Administrators configure permissions to specify the level of control users have in modifying content. Administrators configure D2 to set permissions automatically based on content parameters, such as type, status, date, ownership, change request, lifecycle state, and so on.

You can view the permissions of content by selecting it and clicking Content > Permissions in the menu. The Permissions dialog box shows five columns:

- The User / Group column lists the users and groups that have permissions for this content.
- The Permissions column identifies the basic permissions for each user or group.

- The Extended Permissions column identifies the extended permissions for each user or group.
- The Application Permissions column identifies the user-defined permission level recognized by user-written applications.

You can secure content through IRM if IRM is installed. D2 then displays content with a lock in the file format icon.

The following table describes the seven levels of access provided by basic permissions:

Basic permission	Description
None	You cannot see this because it does not appear through browsing nor in search results.
Browse	You can view the attributes of the content but cannot open it.
Read	You can view the attributes of and open the content but cannot annotate, version, or edit it.
Relate	You can view the attributes of, open, and annotate the content.
Version	You can view the attributes of, open, annotate, and create new versions of the content.
Write	You can view the attributes of, open, annotate, version, and overwrite the content but cannot delete it.
Delete	You can perform all of the above and delete. This is the highest level of access.

Extended permissions give administrative controls to specified users and groups for content. The following table describes the seven extended permissions:

Extended permission	Description
Change State	You can change the lifecycle state of the content.
Change Owner	You can change the owner of the content even if you are not the content owner.
Change Permission	You can change the basic permissions of the content even if you are not the content owner.
Delete Object	You can delete the content regardless of your basic permission level.
Change Folder Links	You can change folder links for the content.
Change Locations	You can change the content location. By default, users with Browse permission or greater inherit this privilege.
Execute Procedure	You can execute external processes on the content, such as creating a rendition. By default, users with Browse permission or greater inherit this privilege.

Related Topics —

Understanding Content, page 49

Understanding Why Content was Renamed or Moved

When a user adds content to the repository or modifies content properties, D2 runs two processes, autolinking and autonaming. These processes minimize the need to organize content within the repository. They are the reason content moved or was renamed without your direct input.

Autolinking modifies content location based on content properties, such as its subject, keywords, and name. For example, the administrator creates the autolink rule of placing all content with Quality Assurance in its name into the folder Quality Assurance Team. If you import content named Quality Assurance Weekly Report 3.8.2012, the autolink rule is triggered. The content is automatically placed under the Quality Assurance Team folder.

Autonaming modifies content name based on content properties. For example, the administrator creates the autonaming rule for modifying all Microsoft PowerPoint documents to have its name end with Presentation. If you import a PowerPoint document named Business Plan, the autonaming rule is triggered. The document is automatically renamed to Business Plan Presentation.

Related Topics —

Understanding Content, page 49

Understanding Relationships

Relationships help organize and process repository content. For example, the annotations feature uses relationships to link annotations automatically to the originating content. You can then access all annotations by viewing the relationships of the original content.

Administrators configure types of relationships, such as copies and parent-child relationships. Each relationship type is comprised of:

- The type (one-to-one or one-to-many) of the relation.
- The ability to configure it from the Properties dialog box.
- The control of new versions of the child content.
- The status of whether the relationship is controlled or not. Modify controlled relations in the content property page.

D2 offers you two ways of modifying content relationships. You can create, edit, and remove relationships as described in the following table:

Action	Description	To perform this action
Create a relationship	Create a relationship from a selected content to another content within the repository using an existing relationship type.	Select content and navigate to **Content** > **Create relation** from the menu bar. Creating a Relationship contains further instructions.
Delete a relation	Delete relations. You cannot delete controlled relationships using the Relations widget. Delete controlled relations by removing content from the relationship list in the properties page. You cannot delete multiple relationships at once.	• Open an instance of the Relations widget and select content in a list widget. • Right-click a relationship and select **Delete relation**. • Click **OK**.

You can also add and remove content through a list of content under a predetermined relationship type. Administrators configure property pages to include specific relationship types. You can then control the list of content using these relationships as described in the following table:

Action	Description	To perform this action
Add content to the relationship	Add content for the relationship to this content.	• Right-click content and select **Properties**. • Scroll down to the set of relationships you want to modify. • Click **Add a relation**, then navigate to and select content. • Click **OK**.
Remove content from the relationship	Remove content from using this relationship type.	• Right-click content and select **Properties**. • Scroll down to the set of relationships you want to modify. • Right-click a relationship and select **Remove this relation**. • Click **OK**.

Automated processes such as property inheritance and features such as annotations also create relationships. View and modify these relationships using the Relations widget.

Related Topics —

Creating a Relationship, page 80
Understanding Content, page 49

Creating a Relationship

1. Select content in a Document list widget, then navigate to **Content** > **Create relation** to open the **New relation creation** dialog box.
2. Fill out the form as described in the following table:

Field	Description
Relation target	Click **Browse** and select the content for which you want to create a relationship. Depending on your D2 configuration setup, you might be able to find the content in one or more ways, such as simple search or repository folder browsing.
Relation type	Select a relationship type.
Reverse relation	Select to reverse the relationship if you are selecting a one-directional relation. For example, you can create a relationship **`Presentation template`** to **`Presentation 2011`** and select the relationship type **Is a copy of**. This sets **`Presentation template`** to be a copy of **`Presentation 2011`**, but the relationship should be flipped. Select **Reverse relation** to set **`Presentation 2011`** to be a copy of **`Presentation template`**.
Description	Type a description.

3. Click **OK**.

Related Topics —

Understanding Relationships, page 78

Understanding Renditions

A rendition is an alternate copy of content or an alternate content associated with an original content. For example, if you export a Microsoft Word document in PDF format, the result is a PDF rendition of the Microsoft Word document. You could also have a presentation of a business plan associated with a business plan document. Depending on your system configuration, you can create a rendition during content checkin and through a lifecycle. Renditions are version-specific and do not display in the Renditions widget unless the version matches.

Perform actions related to renditions as described in the following table:

Action	Description	How to perform this action
View renditions	View all renditions of content.	Open an instance of the Renditions widget and select content in a list widget.
Request rendition	Create a rendition of content. This command sends a rendition request to the configured rendition server.	Select content and navigate to **Content** > **Request rendition** from the menu bar, then click **OK**. It can take time for the rendition request to finish processing. If administrators configured D2 to run in thin client mode, you will not see the dialog box explaining that D2 is processing the rendition request.
Import a rendition	Import content as a rendition.	• Select content and navigate to **Import** > **Rendition** from the menu bar. • Navigate to and select the new rendition of the content. • Click **OK**.
Export a rendition	Export content in a specific file format. Use the Renditions widget to locate and select different renditions. **Note:** Some expected elements within document renditions (such as watermarks and overlays) will not be present in the exported file unless certain permissions are granted and plugins are enabled within D2. Check with your administrator for assistance.	• Right-click on content and select **Export rendition**. • Select the file format you want to export. • Click **OK**.

Related Topics —

Understanding Content, page 49

Understanding Virtual Documents

A virtual document is a collection of files that can be used to generate a large document. For example, you can create a virtual document for a book, then populate the virtual document with the files that comprise chapters. The book virtual document is called a parent and the component files are called children.

You can construct a virtual document using different file types, and you can use files in more than one virtual document at the same time.

Perform actions with virtual documents as described in the following table:

Action	To perform this action
View a virtual document in the virtual document widget.	In the Document list widget, right-click the virtual document and select **Display Virtual Document**.
Add a child component to a virtual document.	In the virtual document widget, right click a node and select **Add child**. From the submenu, you can execute the following: • **Browse**: launches a dialog that allows you to browse the repository for the child component. • **Create**: launches the content creation wizard to add a new child component. • **Import**: launches the import creation wizard to add a new child component. All new child components are added to the repository and included in the specified virtual document structure, below the selected node.
Convert content to a virtual document	In the Document list widget, select all content you want converted to a virtual document parent. Right-click on a highlighted content and select **Convert to Virtual Document**.
Convert a virtual document back to content	In the virtual document widget, right-click the parent you want converted back to a simple content and select **Convert to a Simple Document**. You can only convert a virtual document parent to simple content if it contains no children.

Action	To perform this action
Add content as a component of a virtual document	Drag and drop content from the Document list widget to a virtual document opened in the Virtual Document widget. You cannot drag and drop content from search results. Right-click the content in the search results, select **Locate**, then drag and drop the content from the Document list widget.
Insert a virtual document with properties inherited from a template	1. In the virtual document widget, right-click content under which you want to add the components of a virtual document and select **Insert inherited component**. 2. Navigate to and select the virtual document. Depending on your D2 configuration setup, you might be able to find the content in one or more ways, such as simple search or repository folder browsing. 3. Select the virtual document template to apply its properties and components. 4. Click **OK**.
Remove a component from a virtual document	In the virtual document widget, right-click on the component and select **Delete component**.
Convert a component to a child virtual document	Drag and drop content from the Document list widget or from within the virtual document widget on top of a component within the virtual document widget. D2 converts the component to a virtual document.
Edit a component within a virtual document	In the virtual document widget, right-click the component and select **Edit**.
Delete a virtual document	In the Document list widget, right-click the virtual document and select **Delete**. If you have D2 Bin installed, you can restore a virtual document root from the recycle bin. D2 does not restore components that were added to the virtual document.

<table>
<tr><th>Action</th><th>To perform this action</th></tr>
<tr><td>Set the version of a component to use with the virtual document</td><td>1. In the virtual document widget, right-click the component and select Set binding version.
2. Select the version of the content to be used for the virtual document.
3. Click OK.</td></tr>
<tr><td>Replace a component</td><td>In the virtual document widget, right click a component and select Replace component.
From the submenu, you can execute the following:
• New: launches the content creation wizard to add a new, replacement component.
• Import: launches the import creation wizard to add a replacement component.
• Browse: Browse for a component.
The original component is no longer a part of the virtual document but remains in the repository.</td></tr>
<tr><td>View a component within a virtual document</td><td>In the virtual document widget, right-click the component and select View.
Note: From within the Virtual document widget, you can display a snapshot only by right-clicking the snapshot in a doclist widget and then selecting Display snapshot.</td></tr>
<tr><td>Send a component to a workflow from within a virtual document</td><td>In the virtual document widget, right-click the component(s) and select the appropriate Workflow action.
Note: This right-click menu item must be set up by your system administrator.</td></tr>
</table>

Action	To perform this action
Checking out and checking in a virtual document	Select the virtual document, then navigate to **Content** > **Checkin** or **Content** > **Checkout** from the menu bar. Depending on settings defined by your administrator, you may be given the option to check in the root virtual document only, or the root and all of its descendant documents. When you cancel the checkout of a virtual document with no child components by navigating to **Content** > **Cancel checkout** from the menu bar, the virtual document is reverted to a simple document.
Create a snapshot of the virtual document	1. In the virtual document widget, click **Create Snapshot**. 2. Type a **Title**. 3. Click **OK**.
View a snapshot of the virtual document	In the doclist widget, right-click the virtual document snapshot and select **Display snapshot**. When viewing the snapshot of a Virtual Document in the Virtual Document widget, it appears disabled because you cannot edit it. **Note:** From within the virtual document widget, a snapshot cannot be displayed. If you have D2 Bin installed, you can delete virtual document snapshots, but you cannot view them in the recycle bin.
Delete a snapshot of the virtual document	In the doclist widget, right-click the virtual document snapshot and select **Delete**.
Quick Publishing This option may be available if your D2 installation also has Advanced Publishing Services installed.	Right-click content and select **Quick Publishing**.

You can control content within the virtual document and change the presentation of information in the widget using the command bar:

Icon	Button name	Description
	Expand All	Expand all trees in the selected virtual document.
	Collapse All	Collapse all trees in the selected virtual document.
	Move Up	Move the selected component up. You can also reorder component by dragging and dropping.
	Move Down	Move the selected component down. You can also reorder component by dragging and dropping.
	Show Virtual Document Number	Switch between an unordered list or an ordered list.
	Show Virtual Document Version Number	Show or hide the version number of each component.
	Create Snapshot	Create a snapshot of the virtual document.

Related Topics —

Understanding Content, page 49
Understanding Lifecycles, page 119
Understanding Workflows, page 121
Understanding Content, page 49

Converting Folder Structure to Virtual Document

You can create a virtual document from an existing folder along with its content and subfolders structure. The virtual document automatically selects the parent folder as a virtual document root folder. The root folder type and its properties are created based on the folder structure conversion configuration. If the virtual document root folder is included in the conversion, then its location is ignored during the current folder conversion.

Note: This feature is available only if the folder structure conversion is configured for the user.

1. Navigate to **Content** > **Convert to Virtual Document** from the menu bar.

   Alternatively, you can select **Convert to virtual document** from the folder and cabinet context menu.

2. On the **Fill creation profile** page:

   Note: The **Creation profile** will be populated based on the configuration settings for the user.

   a. Select an **Object Type** from the list box.

   b. Click **Next**.

3. On the **Edit properties** page, fill out the properties form.

4. Click **Convert to Virtual Document** to convert the selected folder and its content to the virtual document.

Comparing Microsoft Word Documents

Use the D2 content compare feature to show the differences between two Microsoft Word documents in your repository.

Note: Compare is only available on Microsoft Windows systems. See Documentum Content Transfer Framework supported feature list, page 58 for compatibility details. You must have read permissions for both documents.

1. In a list widget, select two Microsoft Word documents.

2. Navigate to **Content** > **Compare**.

   A merged Word document opens with the differences between your selected documents highlighted.

Understanding Microsoft Word Annotations

Use the D2 annotations feature to add annotations to content using Microsoft Word. Annotations are version-specific. Content inherit the annotations but do not allow you to modify the annotations. Select the version of the content with the annotation and then edit or delete the annotation using the Relations widget.

Note: If you are using Office 365 or Microsoft Word 2013, then disable the **Open e-mail attachments and other uneditable files in reading view** in **Options** > **General** > **Start up options** in Word for the annotation feature to work.

You can control specific annotations as described in the following table:

Action	Description	To perform this action
Add an annotation	D2 enables you to add annotations to content using Microsoft Word.	In a list widget, select the content, then navigate to **Content** > **Native annotations** from the menu bar.
Check in an annotation	D2 treats each annotation as a type of content. If you create an annotation, check in the annotation to the repository.	In the Relations widget, select the new annotation, right-click to open the context menu, and click **Checkin**.
Edit an annotation	D2 enables you to edit specific annotations.	In the Relations widget, select the annotation you want to edit, right-click to open the context menu, and click **Edit**.
View an annotation	D2 enables you to view content with a specific annotation.	In the Relations widget, select the annotation you want to view, right-click to open the context menu, and click **View**.
Delete an annotation	D2 enables you to delete specific annotations. You can only delete annotations through this method.	In the Relations widget, select the annotation you want to delete, right-click to open the context menu, and click **Delete**.

You can control all annotations attached to the selected version of content as described in the following table:

Action	Description	To perform this action
View annotations	D2 enables you to view source content and all attached annotations.	In a list widget, select the content, then navigate to **Content** > **View with native annotations** from the menu bar.
Edit content containing annotation	D2 enables you to edit the source content with all attached annotations. Saving content edited through this action applies version control.	In a list widget, select the content, then navigate to **Content** > **Edit with native annotations** from the menu bar.
Checkin native annotation	D2 enables you to check in content and all attached annotations.	In a list widget, select the content, then navigate to **Content** > **Check in native annotations** from the menu bar.

Understanding PDF Annotations

If the administrator installed and configured Documentum PDF Annotation Services, you can view and add comments to PDF files. For example, using the commenting feature of Adobe Acrobat results in comments that are attached to the single, local instance of the file. Annotations made through the PDF Annotation Services are saved in the repository separately from the PDF file. Any user with the ability to read the PDF and view the annotations has access to your comments.

Annotations made in the repository are associated with the specific version. For example, annotations on version 1.0 of a PDF file do not migrate to version 1.1.

Related Topics —

Annotating PDF Content, page 89

Annotating PDF Content

1. Right-click content and select **Annotations**.
2. To add drawings, click **Drawing Markups**.
3. Complete your review as described in the following table:

Action	To perform this action
Save the content to perform your review later	Click **Save and Work Offline.** When you are ready to continue your review, click **Send and Receive Comments**.
Save your comments to D2 Client	Click **Send and Receive Comments.**

Related Topics —

Understanding PDF Annotations, page 89

Understanding Comments

Use the Comments widget to write comments for content, to reply to comments, and to view all comments on content. The widget collapses comments across all versions into a single set of comments for each object.

You can perform commenting actions as described in the following table:

Action	Description	To perform this action
Add a comment	Create a standalone comment. New comments have zero indentation.	1. Click **Add a comment**. 2. Write the comment using the text editor. 3. Click **Post**.
Reply to a comment	Reply to existing comments. Comments created this way have an additional level of indentation to indicate the relationship to another comment.	1. Mouse over the comment to which you want to reply and click **Reply**. 2. Write the comment using the text editor. 3. Click **Post**.
Delete a comment	Delete a comment written by you and all replies.	1. Mouse over the comment you want to delete and click **Delete**. 2. Click **Delete** to confirm deletion.

In the case of multirepository commenting, for linked documents, you can add or delete comments in the source repository. In the target repository, you can add comments but cannot delete comments.

Related Topics —

Understanding Content, page 49

Using Intelligent URLs to Interact with Content

You can search, open, and perform actions on content using the D2 content URL. Add the parameters described in the following table to the D2 URL. For example:

```
http://<server>:<port>/D2?docbase=Repository1&login=Admin&password
=administrator
```

Note: If you are using Microsoft Internet Explorer 9, special characters such as > and < must be HTML encoded in the URL. Failure to encode them results in a *400 Bad Request* browser error.

A **locateID** requires a browser tree widget to be present in a workspace. If the workspace does not contain the widget required for the operation, whether specified using **locateTarget** or using the default widget for the operation, D2 opens the Workspace Gallery for you to select a workspace that does contain the widget.

Note: Only **docbase** and **locateId** parameters are supported in the intelligent URL in cases where the located object id is beyond the repo-browser limit (**maxBrowserWidgetResultSetSize**). In these cases, it is not possible to load the entire browser tree. D2 triggers a search to display only the exact document in the doclist widget.

Parameter	Description
Repository	Append **?docbase=<repository name>** This parameter is required in all intelligent URLs and follows the **/D2**
Application	Append **?application=**<application parameter> This parameter must be set up and enabled by the system administrator.
Login and password	Append **&login=<username>&password=<password>** If you do not include the login information in the URL, D2 shows the login dialog box.
Locate content by **r_object_id**	Append **&locateId=<r_object_id>** D2 intelligent URL prompts a dialog if the version associated with the object id has a newer version available. Users can choose an appropriate version.
Locate content by **chronicle_id**	Append **&chronicleId=<r_object_id>**
Locate content by name	Append **&locateName=<content name>**
Locate content by qualification	Append **&locateDql=<DQL query>** For example, **http:/ /<server>D2?docbase=<docbase>&login =<userName>&password<password>&locateDql=dm _document where object_name='<object_name>'** For the current version of document, **i_chronicle_id** is required. For example, **http:/ /<server>D2?docbase=<docbase>&login =<userName>&password<password>&locateDql =dm_sysobject(all) where any r_version_label='CURRENT' and i_chronicle_id =(select i_chronicle_id from dm_sysobject(all) where r_object_id = '<r_object_id>'**
Search content by **selectDql**	Append **&selectDql=<DQL query>** to display multiple results if the query has more than one result to return. You cannot append **commandEvent** parameter to a URL that contains **selectDql** parameter.

Parameter	Description
Locate by path	To locate a folder, append **&locatePath=<folder path>** For example, **http://<server>D2?docbase=<docbase>&login=<userName>&password<password>&locatePath=/abrun/Documents de tests/Folder4/3.1** To locate a document using its object ID, append **&locatePath=<folder path>&locateId=<r_object_id>** For example, **http://<server>D2?docbase=<docbase>&login=<userName>&password<password>&locatePath=/abrun/Documents de tests/Folder4/3.1&locateId=0901ffc380038248** To locate a document using its object name, append **&locatePath=<folder path>&locateName=<content name>** For example, **http://<server>D2?docbase=<docbase>&login=<userName>&password<password>&locatePath=/abrun/Documents de tests/Folder4/3.1&locateName=QA_2012_num_059**
Force a specific target widget on a locate operation	Append **&locateTarget=<widget type>** to force D2 to perform the locate operation in a specific widget. The parameter also sends a widget initialization event. You can use the following widget types: • SearchWidget • TaskFoldersWidget • DoclistWidget (only in breadcrumb mode) • DocgalleryWidget (only in breadcrumb mode) • BrowserWidget

Parameter	Description
Locate content by version	Append **`&version=<content version>`** To locate the latest version, use the value **`CURRENT`**. You can only append this parameter to a URL that contains a content locate parameter such as **`locateId`**. You can append the version parameter or a qualification parameter using a DQL qualification when downloading a document using a URL. Example, using version: **`http://myhost:8082/D2/servlet/Download?format=pdf&auth=basic&event_name=d2_view&_docbase=dev_d2&id=0901ffc380061697&version=0.4`** To locate the latest version using r_object_id of the document, append **`&locateId=<r_object_id>&version=<document_version>`** To locate the latest version using chronicle_id of the document, append **`&chronicleId=<r_object_id>&version=<document_version>`** **Note:** The root r_object_id must have at least BROWSE permissions in order for the version parameter to work. If proper permissions are not in place, an error message appears, or no items are found in the doclist widget.
Perform an event or action on content	Append **`&commandEvent=<action you want performed>`**. Append **`&commandParam=<value>`** to set the value of parameters as described in the list of actions. You can only append this parameter to a URL that contains a content locate parameter such as **`locateId`**. You cannot append **`commandEvent`** parameter to a URL that contains **`selectDql`** parameter. The events and actions you can use are described in the following sections. If D2 shows the error message **`This command is not allowed`**, administrators must enable the action. For example: • To edit content append **`&commandEvent=D2_ACTION_CONTENT_EDIT`** • To cancel checkout append **`&commandEvent=D2_ACTION_CONTENT_CANCEL_CHECKOUT`** • To destroy content append **`&commandEvent=D2_ACTION_OBJECT_DESTROY`** • To start the creation wizard append **`&commandEvent=D2_ACTION_CONTENT_CREATE&commandParam=parentId==<objectId of the target folder>`** **`D2_ACTION_COPY_LINK_IN_CLIPBOARD_XXXX`** events can be used in the intelligent url to copy the URL in the clipboard. The

List of Events and Actions

You can append an event to the URL to force D2 to perform actions based on the event. For example, if you call **`D2_EVENT_SELECT_OBJECT`**, D2 performs automated actions on content as if the end user had selected content in a widget. The list of events are as described in the following table:

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_CUSTOM	Uses an external widget.	Parameters depend on the custom event.
D2_EVENT_DM_TICKET _GENERATED	Sends a message using **`D2_ACTION_DM_TICKET _GENERATE`**	**`ticket`**: Documentum ticket. **`ticket_timeout`**: Documentum ticket timeout in milliseconds. **`ticket_time_generated`**: Time of ticket generation in posix time. **`ticket_time_expiration`**: Time of ticket expiration in posix time.
D2_EVENT_SELECT_OBJECT	Selects content.	**`parentId`**: ID of the parent object. **`parentType`**: Type of the parent object.
D2_EVENT_SELECT _OBJECTS	Selects multiple content.	**`oam_id`**: List of object IDs separated by **`SEPARATOR_VALUE`**.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_LOCATED _OBJECT	Locates content.	**`oam_id`**: ID of the object. **`locationType`**: Location type, such as the widget type in which the content is shown. **`locateId`**: ID of the object to locate. **`locateName`**: Name of the object to locate. **`version`**: Version of the object to locate. **`chronicleId`**: ChronicleID of the object to locate. **`collapseId`**: List of IDs of the folders to reload.
D2_EVENT_LOCATED _SEARCH	Locates a search.	**`oam_id`**: ID of the object.
D2_EVENT_LOCATED_TASK	Locates a task.	**`oam_id`**: ID of the object.
D2_EVENT_OBJECT _DESTROYED	Destroys content.	**`oam_id`**: List of object IDs separated by **`SEPARATOR_VALUE`**.
D2_EVENT_OBJECT _CREATED	Creates content.	The channel only applies to the Doclist widget. **`oam_id`**: ID of the folder. **`pathId`**: Path ID of the object. For example, **`/reponame /0c0d04e580000105 /0b0d04e580055dd8`**
D2_EVENT_COMMENT _ADDED	Creates a comment.	The channel only applies to the Comments widget. **`comment`**: ID of the comment.
D2_EVENT_FILTER _CHANGED	Changes the global filter of the workspace.	
D2_EVENT_CHECKOUT _STATE_CHANGED	Changes content checkout state.	
D2_EVENT_PREFERENCES _CHANGED	Changes their user preferences.	

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_PREFERENCES_LOADED	Loads their user preferences.	
D2_EVENT_WIDGET_GET_FOCUS	Clicks on a widget.	
D2_EVENT_WIDGET_FOCUS	D2 sets a widget to active.	**`config`**: Widget configuration name. **`widgetType`**: set the value to the widget type. If you want to set a specific instance of a widget, use **`config`** and set the value to the widget name.
D2_EVENT_WIDGET_DISPLAYED	A widget is displayed.	**`config`**: Widget configuration name. **`widgetType`**: Widget type of the event source.
D2_EVENT_WIDGET_HIDDEN	A widget is hidden.	**`config`**: Widget configuration name. **`widgetType`**: Widget type of the event source.
D2_EVENT_SEARCH_RUN	Runs a search.	The channel only applies to the Searches widget and the Doclist widget. **`oam_id`**: ID of the search.. **`searched_type`**: Search type.
D2_EVENT_SEARCH_SAVED	Saves a search.	The channel only applies to the Searches widget. **`oam_id`**: ID of the search.. **`is_public`**: Set to **`true`** if the search is public or shared.
D2_EVENT_SEARCH_CATEGORY_CREATED	Creates a search category.	The channel only applies to the Searches widget.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_WORKFLOW_ABORTED	Aborts a workflow.	The channel only applies to the Searches widget. **oam_id**: List of object IDs separated by **SEPARATOR_VALUE**. **widgetType**: set the value to the widget type associated with the event.
D2_EVENT_SELECT_TASK	Selects a task.	**oam_id**: ID of the task.
D2_EVENT_SELECT_TASK_FOLDER	Selects a folder in the task manager widget.	The channel activates task details, task attachments, and task notes. **oam_id**: ID of the task folder.
D2_EVENT_SELECT_TASK_NOTE	Selects a note in the task notes widget.	The channel only applies when communicating from the Task browser widget to the Task list widget. **oam_id**: ID of the task note.
D2_EVENT_SELECT_TASK_PERFORMER	Selects a performer in the task performers widget.	**oam_id**: ID of the task performed. The following are copied from the selected item: **icon** **id** **locked** **style** **thumbnail** **version** **immutable**: D2 sets this to **true** if the item is immutable.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_TASK_READ_STATE_CHANGED	Changes the read state of a task.	**`oam_id`**: ID of the task. **`locateId`**: ID of the task to locate. **`parentId`**: ID of the parent task.
D2_EVENT_TASK_PRIORITY_CHANGED	Changes the priority of a task.	**`oam_id`**: ID of the task. **`parentId`**: ID of the parent task.
D2_EVENT_TASK_PROCESSED	Forwards or rejects a task.	**`oam_id`**: ID of the task.
D2_EVENT_WIDGET_INITIALIZED	Opens a widget.	
D2_EVENT_WORKSPACE_CLOSED	Closes a workspace.	**`oam_cuid`**: Uid of the workspace tab that was closed.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_THEME _CHANGED	Changes a workspace theme.	**`oam_cuid`**: Uid of the container. The following are copied from the theme: **`background_color`** **`background_color_type`** **`background_color _gradient_end`** **`background_color _gradient_start`** **`background_color _texture_name`** **`header_color`** **`label`**: Theme label. **`name`**: Theme name. **`selection_blur_color`** **`selection_color`** **`border_color`** **`title_color`** **`tab_active_color`** **`tab_border_color`** **`tab_inactive_color`** **`dialog_background _white`**: D2 sets this to **`true`** if the dialog background is white. **`tab_colored_text`**: Boolean for whether the tabs use colored text.
D2_EVENT_RENDITION _ADDED	Creates a different rendition of content.	The channel only applies to the Renditions widget. **`oam_id`**: ID of the content.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_IFRAME_ACTIVE	Activates an iframe.	**oam_value**: Boolean to indiciate if the iframe is activated or deactivated.
D2_EVENT_IFRAME_INIT	Opens an iframe.	**channels**: List of events. **D2_EVENT_THEME_CHANGED** contains information about the iframe theme.
D2_EVENT_SELECT _TAXONOMY	Selects a taxonomy.	The channel only applies to the Properties widget. **oam_id**: ID of the taxonomy. The event copies the taxonomy item attributes.
D2_EVENT_SELECT _DICTIONARY	Selects a dictionary.	The channel only applies to the Properties widget. **oam_id**: ID of the dictionary. The event copies the dictionary item attributes.
D2_EVENT_SELECT_USER	Selects a user.	The channel only applies to the Properties widget. **oam_id**: ID of the user. The event copies the user item attributes.
D2_EVENT_USER_CREATED	Creates a user.	The channel only applies to the Users widget. **oam_id**: ID of the user.
D2_EVENT_SELECT_GROUP	Selects a group.	The channel only applies to the Properties widget. **oam_id**: ID of the group. The event copies the group item attributes.
D2_EVENT_GROUP _CREATED	Creates a group.	The channel only applies to the Groups widget. **oam_id**: ID of the group.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_SELECT _RELATION	Selects a relation.	The channel only applies to the Relations widget. **oam_id**: ID of the relation. The event copies the relation item attributes.
D2_EVENT_SELECT _RENDITION	Selects a rendition in the rendition widget.	The channel only applies to the Renditions widget. **oam_id**: ID of the rendition. The event copies the rendition item attributes.
D2_EVENT_SELECT _RETENTION	Selects a retention policy.	The channel only applies to the Retentions widget. **oam_id**: ID of the retention policy. The event copies the retention policy item attributes.
D2_EVENT_SELECT _MARKUP	Selects a markup policy.	**oam_id**: ID of the markup policy. The event copies the markup policy item attributes.
D2_EVENT_SELECT _SEARCH	Selects a saved search.	The channel only applies to the Doclist widget. **oam_id**: ID of the search. The event copies the search item attributes.
D2_EVENT_SELECT_FACET	Selects a facet.	The channel only applies to the Doclist widget. **oam_id**: ID of the facet. The event copies the facet item attributes.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_SELECT _QUERYFORM	Selects a query form search.	The channel only applies to the Doclist widget. **oam_id**: ID of the query form search. The event copies the query form search item attributes.
D2_EVENT_SELECT _DISTRIBUTION	Selects a distribution.	**oam_id**: ID of the distribution. The event copies the distribution item attributes.
D2_EVENT_SELECT _WORKFLOWTRACKER	Selects a workflow overview.	**oam_id**: ID of the workflow overview. The event copies the workflow overview item attributes.
D2_EVENT_SELECT _WORKFLOW_ACTIVITY	Selects a workflow activity.	**oam_id**: ID of the workflow activity. The event copies the workflow activity item attributes.
D2_EVENT_SELECT_AUDIT	Selects an audit event.	**oam_id**: ID of the audit. The event copies the audit item attributes.
D2_EVENT_SELECT _SNAPSHOT	Selects a virtual document snapshot.	The channel only applies to the Snapshots widget. **oam_id**: ID of the virtual document snapshot. The event copies the virtual document snapshot item attributes.
D2_EVENT_VD_TEMPLATE _SELECTED	Selects a virtual document template form.	The channel only applies to the Snapshots widget. **oam_id**: ID of the virtual document template. The event copies the virtual document template item attributes.
D2_EVENT_DRAG_DROP _STARTED	Begins dragging and dropping.	**oam_id**: List of content IDs.

Channel name	When an end user or D2	Parameters and notes for focus events
D2_EVENT_DRAG_DROP_ENDED	Stops dragging and dropping.	**`oam_id`**: List of content IDs.
D2_EVENT_VIEW_SWITCHED_MANUAL	Manually switches the workspace view.	**`oam_id`**: View position (0 if none). **`oam_value`**: New view label. **`oam_cuid`**: UID of the workspace tab.
D2_EVENT_VIEW_SWITCHED_AUTO	Automatically switches the workspace view.	**`oam_id`**: View position (0 if none). **`oam_value`**: New view label. **`oam_cuid`**: UID of the workspace tab.
D2_EVENT_IMPORTED_FROM_URL	Imports content from a URL.	**`oam_id`**: View position (0 if none). **`cancelReason`**: Reason for cancellation if the operation is canceled. **`result`**: Contains the result if the operation is completed. **`error`**: Contains the error if the operation fails.
D2_EVENT_EXPORTED_FROM_URL	Exports content from a URL.	**`oam_id`**: View position (0 if none). **`cancelReason`**: Reason for cancellation if the operation is canceled. **`result`**: Contains the result if the operation is completed. **`error`**: Contains the error if the operation fails.
D2_EVENT_DOWNLOAD_URLS_RECEIVED	Publishes a **`D2_ACTION_DOWNLOAD_URLS_REQUEST`** action.	**`urls`**: Contains a concatenated string of URLs.

You can perform an action on content as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_OPEN_FOLDER	Opens a folder in the repository.	The channel only applies to the Doclist widget. **`oam_id`**: ID of the folder. **`collapseId`**: List of IDs of the folders to reload. **`pathId`**: Path ID of the object. For example, **`/reponame /0c0d04e580000105 /0b0d04e580055dd8`**
D2_ACTION_OPEN_URL	Opens a URL in a new browser window.	**`url`**: the URL to open.
D2_ACTION_OPEN_VD	Opens a virtual document in the repository.	The channel only applies to the Virtual Documens widget. **`oam_id`**: ID of the virtual document.
D2_ACTION_OPEN _SNAPSHOT	Opens a virtual document snapshot.	The channel only applies to the Snapshots widget.
D2_ACTION_LOCATE _OBJECT	Locates content in the repository.	The channel only applies to the Locations widget. **`oam_id`**: ID of the content.
D2_ACTION_LOCATE_TASK	Locates a task.	The channel only applies to the Locations widget. **`oam_id`**: ID of the task.
D2_ACTION_LOCATE _SEARCH	Locates a saved search.	The channel only applies to the Locations widget. **`oam_id`**: ID of the task.
D2_ACTION_REFRESH _DOCUMENT	Refreshes content.	**`oam_id`**: ID of the content. **`import`**: Present if the refresh is related to the import.
D2_ACTION_COPY_LINK_IN _CLIPBOARD	Copies the smartlink to the content.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN _CLIPBOARD_LOCATE	Copies the smartlink to the object in the clipboard.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN _CLIPBOARD_VIEW	Views the document.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN _CLIPBOARD_VIEW_NATIVE	Views the document without renditions or metadata.	**`oam_id`**: ID of the object to locate.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_COPY_LINK_IN_CLIPBOARD_VIEW_WITH_NATIVE_ANNOTATION	Views the document with native annotations.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN_CLIPBOARD_SERVLET_VIEW	Views the document in the servlet view. **Note:** The servlet view opens the file and performs the action without login to the D2 and without having to go through the D2 user interface.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN_CLIPBOARD_SERVLET_VIEW_NATIVE	Views the document in the servlet view without renditions or metadata.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN_CLIPBOARD_SERVLET_VIEW_CURRENT	Views the current version of the document in the servlet view.	**`oam_id`**: ID of the object to locate.
D2_ACTION_COPY_LINK_IN_CLIPBOARD_SERVLET_VIEW_NATIVE_CURRENT	Views the current version of the document with native content in the servlet view.	**`oam_id`**: ID of the object to locate.
D2_ACTION_DUMP	Shows a dump of the content.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT_CHECKIN	Checks in the content.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT_IMPORT_AS_VERSION	Imports a new version of content.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT_CHECKIN_NATIVE_ANNOTATION	Checks in content as a native annotation.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT_PRINT	Prints content.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT_COMPARE	Compares two content.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT_EXPORT	Exports content.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.
D2_ACTION_CONTENT_EXPORT_NATIVE	Export content without including renditions or metadata.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_CONTENT _EXPORT_FOLDER	Exports folder content.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.
D2_ACTION_CONTENT _EXPORT_FOLDER_NATIVE	Exports folder content without including renditions or metadata.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.
D2_ACTION_CONTENT _VIEW	Views content.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.
D2_ACTION_CONTENT _VIEW_NATIVE	Views content without renditions or metadata.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download. **Note:** : In order to get the native format of content you need at minimum Version permissions, otherwise rendition will display.
D2_ACTION_CONTENT _EDIT	Edits content.	**`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.
D2_ACTION_CONTENT _CHECKOUT	Checks out content.	The channel only applies to the Checkout widget. **`oam_id`**: ID of the content. **`DOWNLOAD_LOCATION`**: Location for download.
D2_ACTION_CONTENT _CANCEL_CHECKOUT	Cancels the checkout of content.	**`oam_id`**: ID of the content. **`locateAndRefresh`**: Boolean to determine if the location and refresh occurred. **`refreshCheckoutState`**: Boolean to determine if the checkout state is refreshed.
D2_ACTION_CONTENT _EDIT_WITH_NATIVE _ANNOTATION	Edits content with native annotations.	**`oam_id`**: ID of the content.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_CONTENT _VIEW_WITH_NATIVE _ANNOTATION	Views content with native annotations.	**`oam_id`**: ID of the content.
D2_ACTION_CONTENT _EDIT_NATIVE _ANNOTATION	Edits a native annotation.	**`oam_id`**: ID of the content.
D2_ACTION_COMMENT	Shows the comment creation dialog box. Set **`parentCommentId`** as the parent comment.	The channel only applies to the Comments widget. **`oam_id`**: ID of the content. **`parentCommendId`**: ID of the parent comment. **`id`**: ID of the comment. **`editor`**: Richtext body of the comment.
D2_ACTION_CONTENT _CREATE	Shows the content creation dialog box. Set **`parentId`** as the parent folder as the content location if no autolink is set.	**`oam_id`**: ID of the content used for properties inheritance. **`parentId`**: ID of the parent folder. D2 creates content inside the specified folder if no autolink is set.
D2_ACTION_CONTENT _IMPORT	Shows the content import dialog box. Set **`parentId`** as the parent folder as the content location if no autolink is set.	**`oam_id`**: ID of the content used for properties inheritance. **`parentId`**: ID of the parent folder. D2 creates content inside the specified folder if no autolink is set. **`files`**: list of files on the client machine.
D2_ACTION_FOLDER _CREATE	Shows the folder creation dialog box. Set the **`root_object_type`** to **`dm_folder`** or **`dm_cabinet`**.	**`oam_id`**: ID of the folder in which the new folder is being created. **`root_object`**: set to **`dm_folder`** or **`dm_cabinet`** to specify the folder type.
D2_ACTION_OBJECT _DESTROY	Shows the content destruction dialog box. Set **`parentCommentId`** as the parent content.	**`oam_id`**: ID of the content.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_PERMISSIONS_SHOW	Shows the permissions dialog box.	**`oam_id`**: ID of the content.
D2_ACTION_RENDITION_ADD	Shows the add rendition dialog box.	**`oam_id`**: ID of the content.
D2_ACTION_RENDITION_REQUEST	Requests a rendition.	**`oam_id`**: ID of the content.
D2_ACTION_RELATION_CREATE	Shows the relationship creation dialog box.	**`oam_id`**: ID of the content.
D2_ACTION_RELATION_DESTROY	Shows the relationship destruction dialog box. Set **`associate_id`** as the ID of the relation to destroy.	**`oam_id`**: ID of the content. **`associate_id`**: ID of the relation.
D2_ACTION_MASS_UPDATE	Runs a mass update configuration. Set **`config_name`** as the name of the mass update configuration.	**`oam_id`**: ID of the content. **`config_name`**: name of the mass update configuration.
D2_ACTION_CUT	Performs a cut operation.	**`oam_id`**: ID of the content. **`parentId`**: ID of the parent content.
D2_ACTION_COPY	Performs a copy operation.	**`oam_id`**: ID of the content. **`parentId`**: ID of the parent content.
D2_ACTION_PASTE	Performs a paste operation.	**`parentId`**: ID of the parent content.
D2_ACTION_PASTE_LINK	Pastes a link of the clipboard content.	**`parentId`**: ID of the parent content.
D2_ACTION_CLIPBOARD_GET	Retrieves the clipboard content. This action triggers **`D2_ACTION_CLIPBOARD_CONTENT`**.	
D2_ACTION_CLIPBOARD_CONTENT	Performs an operation on the clipboard content.	**`clipboard-operation`**: Operation performed from the clipboard. **`clipboard-contentId`**: ID of the clipboard content. **`clipboard-value`**: Value of the clipboard content.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_DOWNLOAD _URLS_REQUEST	Requests a list of document URLs for content.	**`oam_id`**: ID of the content. **`format`**: Format of the content. **`pageModifier`**: Page modifier. **`pagenumber`**: Page number.
D2_ACTION_IMPORT_FROM _URL	Imports content from a URL.	**`oam_id`**: ID of the content. **`url`**: URL of the content. **`isModel`**: Set to **`true`** to make the content modal.
D2_ACTION_EXPORT_FROM _URL	Exports content from a URL.	**`oam_id`**: ID of the content. **`url`**: URL of the export location.. **`useViewLocation`**: Set to **`true`** to use the view location, otherwise the export opens the application selection dialog box. **`hasDataPost`**: Boolean to indicate whether the export operation has information in the **`dataPost`** parameter. **`dataPost`**: The values to post.
D2_ACTION_SENDMAIL	Sends mail.	**`oam_id`**: ID to send. You do not need to use **`oam_id`** if you used **`id`**. **`id`**: ID to send. **`type`**: Object type. **`parentType`**: Parent content type. Optional.
D2_ACTION_FAVORITE _ADD	Adds content to the list of favorites.	**`oam_id`**: ID of the content.
D2_ACTION_FAVORITE _REMOVE	Removes content from the list of favorites.	**`oam_id`**: ID of the content.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_ACROBAT _ANNOTATION_OPEN	Opens an Adobe Acrobat annotation.	**`oam_id`**: ID of the content.
D2_ACTION_TICKET _GENERATE	Generates a Documentum ticket.	

You can perform interface actions as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_DISPLAY _DIALOG	Shows a dialog box.	**`oam_id`**: ID of the dialog box. **`raw`**: A boolean that retrieves the raw **`oam_id`** content when set to **`true`**. Optional. **`DIALOG_NAME`**: Dialog box name. **`MANAGER`**: Manager class name. Optional. **`parentType`**: Parent object type. Optional. **`mode`**: Create, edit, or import mode of the dialog box. Optional.
D2_ACTION_EXECUTE _MANAGER	Executes a manager class for a dialog box.	**`oam_id`**: ID of the dialog box. **`raw`**: A boolean that retrieves the raw **`oam_id`** content when set to **`true`**. Optional. **`DIALOG_NAME`**: Dialog box name. **`MANAGER`**: Manager class name.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_EXECUTE	Executes an action.	**`rId`**: Returned ID. By default, this is set to the message ID. **`rType`**: Returned type (JS, NATIVE, or EVENT). By default, this does nothing. **`rAction`**: Returned action (inline Javascript, native function name, or event name). By default, this does nothing. **`eMode`**: Entry mode (set as SINGLE to call the action for one ID, MONO to call the action once for each ID, or MULTI to call the action once with a list of all provided IDs). By default, this is set to MULTI. **`eCall`**: Entry call for when eMode is set to **`MONO`** (set as SEQUENTIAL to call the actions one at a time by waiting for each service call to return or PARALLEL to call the actions at the same time). By default, this is set to SEQUENTIAL. **`eMethod`**: Name of the entry method. This is only required for D2FS services in conjunction with the eService parameter. **`eService`**: Name of the plug-in interface service without the **`I`** prefix and **`Service`** suffix.
D2_ACTION_REFRESH _WIDGET	Refreshes the widget.	**`oam_id`**: ID of the widget. **`target_type`**: Widget type.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_RELOAD _WORKSPACE	Refreshes the active workspace.	**oam_id**: ID of the workspace. **option_same_repository**: Determines if the workspace is in the same repository.
D2_ACTION_WIDGET _FULLSCREEN	Sets the widget to fullscreen view.	**original_widget**: Original widget ID. **original_event**: Original event ID. **original_cuid**: Original cuid. **original_global**: Original global ID. **url**: URL of the widget.

You can perform a distribution action as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_DISTIBUTION _ACCEPT	Accepts the distribution. Set **config_name** as the distribution configuration name.	**oam_id**: ID of the content. **config_name**: name of the distribution.
D2_ACTION_DISTRIBUTION _REJECT	Rejects the distribution. Set **config_name** as the distribution configuration name.	**oam_id**: ID of the content. **config_name**: name of the distribution.
D2_ACTION_DISTRIBUTION _PREPARE	Prepares the distribution. Set **config_name** as the distribution configuration name.	**oam_id**: ID of the content. **config_name**: name of the distribution.
D2_ACTION_DISTRIBUTION _LAUNCH	Launches the distribution. Set **config_name** as the distribution configuration name.	**oam_id**: ID of the content. **config_name**: name of the distribution.
D2_ACTION_DISTRIBUTION _STOP	Stops the distribution. Set **config_name** as the distribution configuration name.	**oam_id**: ID of the content. **config_name**: name of the distribution.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_DISTRIBUTION_REPORT	Reports the distribution. Set **`config_name`** as the distribution configuration name.	**`oam_id`**: ID of the content. **`config_name`**: name of the distribution.
D2_ACTION_SUBSCRIBE	Subscribes to a distribution.	**`oam_id`**: ID of the distribution.

You can perform a search action as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_SEARCH_DOCUMENT	Searches the repository for content.	**`oam_id`**: ID of the search. **`locateId`**: ID of the object to search. **`searched_type`**: Search type name. **`facet_attr_name`**: Facet attribute name. **`facet_attr_value`**: Facet attribute value. **`reset_facet_attr_name`**: Reset the facet attribute name.
D2_ACTION_SEARCH_HIGHLIGHT_TERMS	Highlight search terms.	**`oam_value`**: Binary value for whether to highlight search terms (0 or 1).
D2_ACTION_ADVANCED_SEARCH	Shows the advanced search dialog box.	**`oam_id`**: ID of the search. If you set this to **`null`**, the action prompts the user to create a new advanced search.
D2_ACTION_SEARCH_CATEGORY_DIALOG	Shows the advanced search category dialog box.	
D2_ACTION_PREFERENCES_SHOW	Shows the user preferences dialog box.	
D2_ACTION_QUERYFORM_SHOW	Shows the query form search dialog box.	**`oam_id`**: ID of the content.
D2_ACTION_QUERY_CATEGORY_DIALOG	Shows the query form search category dialog box.	

You can perform a virtual document action as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_CONVERT_VD	Converts a document to a virtual document.	**oam_id**: ID of the content.
D2_ACTION_CONVERT _DOC	Converts a virtual document to a simple document.	**oam_id**: ID of the virtual document.
D2_ACTION_SNAPSHOT _CREATE	Creates a virtual document snapshot.	The channel only applies to the Snapshots widget. **oam_id**: ID of the virtual document.
D2_ACTION_VD_ADD _CHILD_SELECTED	Shows the add child dialog box.	
D2_ACTION_VD_REMOVED _CHILD_SELECTED	Shows the remove child dialog box.	
D2_ACTION_VD_SET_CHILD _BINDING_VERSION	Shows the binding version dialog box.	
D2_ACTION_VD_INSERT _INHERITED_COMPONENT	Shows the insert inherited component dialog box.	
D2_ACTION_VD_CLEAR_VD	Clears a virtual document of elements.	

You can perform a lifecycle or workflow action as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_LIFECYCLE _DCTM	Runs a lifecycle operation on a Documentum lifecycle.	**oam_id**: ID of the content. **operation**: the operation to perform. **policyId**: the policy to use.
D2_ACTION_LIFECYCLE_D2	Runs a lifecycle operation on a D2 lifecycle.	**oam_id**: ID of the content. **operation**: the operation to perform. **policyId**: the policy to use.
D2_ACTION_WORKFLOW _LAUNCH	Launches a workflow.	**oam_id**: ID of the content. **config**: name of the workflow configuration.
D2_ACTION_WORKFLOW _LAUNCH_SCHEDULED	Launches a workflow when scheduled.	**oam_id**: ID of the **queue_item**.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_WORKFLOW_UPDATE_PERFORMERS	Shows the update performers dialog box.	**oam_id**: ID of the **queue_item**. **workflowTrackerId**: ID of the workflow tracker used if **oam_id** is not an **ID2cWorkfowTracker** or **IDfQueueItemworkflow**. Optional.
D2_ACTION_WORKFLOW_ABORT	Shows the abort workflow dialog box.	**oam_id**: ID of the workflow tracker.
D2_ACTION_TASK_ACQUIRE	Sets the task as acquired.	**oam_id**: ID of the task. **parentId**: ID of the parent task. **forceAcquire**: set to **true** to force acquisition. **forceRead**: set to **true** to force reading.
D2_ACTION_TASK_READ	Toggles the read or unread status of the task.	**oam_id**: ID of the task. **parentId**: ID of the parent task. **read**: set to **true** or **false**.
D2_ACTION_TASK_PRIORITY	Sets the task priority.	**oam_id**: ID of the task. **parentId**: ID of the parent task. **priority**: set to the priority integer.
D2_ACTION_TASK_FORWARD	Shows the task progression dialog box.	**oam_id**: ID of the task.
D2_ACTION_TASK_REJECT	Shows the task rejection dialog box.	**oam_id**: ID of the task.
D2_ACTION_TASK_DELEGATE	Shows the task delegation dialog box.	**oam_id**: ID of the task. **source**: set to **tracker** or **task**.

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_TASK_NOTE	Shows the task note dialog box.	The channel only applies to the Task notes widget. **oam_id**: ID of the task.
D2_ACTION_TASK_PROCESS	Shows the task processing dialog box. Set **operation** as the operation to perform.	**oam_id**: ID of the task. **operation**: the operation to perform.

You can perform a taxonomy or widget action as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_TAXONOMY _EXPORT	Shows the taxonomy export dialog box.	**oam_id**: ID of the taxonomy.
D2_ACTION_TAXONOMY _IMPORT	Shows the taxonomy import dialog box.	**oam_id**: ID of the taxonomy.
D2_ACTION_TAXONOMY _CHECKIN	Shows the taxonomy checkin dialog box.	**oam_id**: ID of the taxonomy.
D2_ACTION_TAXONOMY _SAVE	Shows the taxonomy save dialog box.	**oam_id**: ID of the taxonomy.
D2_ACTION_TAXONOMY _PROPERTIES	Shows the taxonomy properties dialog box.	**oam_id**: ID of the taxonomy.
D2_ACTION_TAXONOMY _LOCATE	Searches for the taxonomy.	The channel only applies to the Locate widget. **oam_id**: ID of the taxonomy.
D2_ACTION_TAXONOMY _RESTORE	Shows the taxonomy restoration dialog box.	**oam_id**: ID of the taxonomy.
D2_ACTION_DICTIONARY _EXPORT	Shows the dictionary export dialog box.	**oam_id**: ID of the dictionary.
D2_ACTION_DICTIONARY _IMPORT	Shows the dictionary import dialog box.	**oam_id**: ID of the dictionary.
D2_ACTION_DICTIONARY _SAVE	Shows the dictionary save dialog box.	**oam_id**: ID of the dictionary.
D2_ACTION_DICTIONARY _RESTORE	Shows the dictionary restoration dialog box.	**oam_id**: ID of the dictionary.
D2_ACTION_DICTIONARY _UPDATE	Shows the dictionary update dialog box.	**oam_id**: ID of the dictionary.
D2_ACTION_DICTIONARY _PROPERTIES	Shows the dictionary properties dialog box.	**oam_id**: ID of the dictionary.

You can perform user and group management actions as described in the following table:

Channel name	Requests that D2	Parameters and notes for focus events
D2_ACTION_OPEN_GROUP	Opens a group	**oam_id**: ID of the group.
D2_ACTION_GROUP _CREATE	Creates a group.	The channel only applies to the Groups widget.
D2_ACTION_GROUP _PROPERTIES	Sets the properties of a group.	The channel only applies to the Properties widget. **oam_id**: ID of the group.
D2_ACTION_USER_CREATE	Creates a user.	The channel only applies to the Users widget. **oam_id**: ID of the user.
D2_ACTION_USER _PROPERTIES	Sets the properties of a user.	The channel only applies to the Properties widget. **oam_id**: ID of the user.

Related Topics

Related Topics —

Understanding Content, page 49
Checking In Content, page 75
Creating Content, page 55
Exporting Content, page 74
Importing Content, page 60
Importing Content as a New Version, page 69
Importing an Email and Attachments, page 70

Chapter 7

Working with Lifecycles and Workflows

Understanding Lifecycles

A lifecycle is a sequence of states and is used to:

- Indicate the status of the content as it passes from one business protocol to another.
- Apply and change content retention and markup policies.

You can send content to a lifecycle on a rendition-specific basis. Users with content modification privileges can modify any lifecycle progress. You cannot designate specific users to perform lifecycle progression, and administrators can only grant or withhold lifecycle privileges to and from user groups. As a result, lifecycle modification has less management controls than a workflow. Use a lifecycle for simple procedures.

Lifecycle states progress in sequential order using a set of conditions and following states. Both promotion and demotion are considered sequential. Administrators can configure progression to display a prompt that requests electronic signatures, confirmation, and so on. The lifecycle does not progress until these prompts are completed.

The following table describes an example lifecycle:

State	Condition	Next state
Draft	None	Reviewed
Reviewed	Content is in Draft state	Draft Approved: requests electronic signature
Approved	Content is in Reviewed state Content is a PDF	None

In this example:

- Content can progress from Draft to Reviewed to Approved. Content can progress by repeatedly going to Draft after Reviewed.
- If you progress from Reviewed PDF to Approved, the system confirms the conditions have been met. If this progression requests an electronic signature, a prompt appears. When you electronically sign the approval, the system progresses the state to Approved.
- If you try to progress a spreadsheet instead of a PDF, the system rejects the progression request because one of the conditions was not met.

Administrators can configure lifecycle batches, which automatically change content properties based on configured frequency and trigger state. The system supports lifecycle models configured by D2 and Documentum. While the system supports the usage of both D2 and Documentum lifecycle models, you must only select one for application to a single content. Multiple models lead to complications arising from the overwriting of the status property and applying multiple retention and markup policies. Unexpected states can then break a workflow process.

Depending on how the lifecycle was configured, you may also need to complete an electronic signature when progressing from one state to another.

The following table describes how to send and move content through a lifecycle:

Name	Description	To perform this action
Sending content to a D2 lifecycle	Initializes the content lifecycle process by setting a status based on the desired D2 lifecycle.	In the Document list widget, right-click to open a context menu for content, select **Lifecycle**, select **Initialize**, and select a lifecycle state. **Note:** You can select multiple documents in the Document list and initialize through the right-click menu as long as the documents share a common point in the lifecycle. For example, if you select three documents with the intention to move them to "Start Review", the context menu will not be active if one of the documents is already "Closed".
Sending content to a Documentum lifecycle	Initializes the content lifecycle process by setting a status based on the desired Documentum lifecycle.	In the Document list widget, right-click to open a context menu for content, select **Lifecycle**, select **Apply**, and select a lifecycle state.
Moving content to another step in the lifecycle (promoting and demoting)	Sets the content state to the selected lifecycle state.	In the Document list widget, right-click to open a context menu for content, select **Lifecycle**, and select a lifecycle state. **Note:** You can select multiple documents in the Document list and change lifecycle state through the right-click menu as long as the documents share a common point in the lifecycle. For example, if you select three documents with the intention to move them to "Start Review", the context menu will not be active if one of the documents is already "Closed".

Depending on the configuration of the lifecycle, D2 may ask for an electronic signature when the lifecycle state changes.

Related Topics —

Example of a Workflow and a Lifecycle, page 125
Understanding the Differences Between Workflows and Lifecycles, page 124
Understanding Workflows, page 121
Sending Content by email from D2, page 130
Understanding Virtual Documents, page 82
Understanding Content, page 49
Understanding Workflows, page 121

Understanding Workflows

A workflow:

- Is a formalized version of a business process which has been broken down into individual tasks.
- Applies business processes into the lifecycle of a content.
- Supports commenting, tracking of workflow progress, management of various participants, and attaching of supplementary content.

Administrators configure a workflow using a workflow template. Configuration includes entry conditions, task automation, and groups of participants. Automation ensures that users control only the steps that require user input, reducing the need for someone to constantly monitor progress. Minimizing human intervention enables the workflow to progress quickly through procedural tasks. Once an administrator has configured a workflow, users with content management privileges are able to send content to a workflow.

Once a workflow starts, the tasks are sent to the designated users. Content passes through the workflow as users acquire, accept, reject, and delegate tasks. Users and administrators can designate specific users to perform specific tasks. The restriction of process modification gives more security and control over the workflow than a lifecycle. As a result, users can manage the content lifecycle even when multiple users are handling the content.

Unlike a lifecycle which must progress through content states in sequential order, workflow tasks are configured with specific output states. A workflow can then incorporate a more complex order of states than a lifecycle. Use a workflow instead of a lifecycle for most business processes.

For a user, using a workflow means that:

- If you are a member of a specific group for a workflow, you receive notification when your group is needed for a task.
- If you have been assigned a task, it appears in both your Task browser widget and your Workflow task list widget. You can perform progression actions on these tasks.

Depending on how the workflow was configured, you may also need to complete an electronic signature when progressing from one state to another.

You can progress, comment on, and change the priority and status of tasks as described in the following table:

Action	Description	To perform this action
Filter the task list	Applies a filter to the task list so the list is easier to navigate. **Note:** Filter icons will not display if the task list does not include one or more tasks that meet the filter criteria. Filter toolbars are enabled by the D2 administrator and might not be available.	At the top of the Workflow task list widget, click one of the following filters in the toolbar: • **All Tasks**: Shows any task that you can display in the task list • **Unread Tasks**: Shows any task that you have already viewed • **Pending Tasks**: Shows tasks with a due date that is within 5 days of current date • **Overdue Tasks**: Shows any task where the due date is past. • **Priority Tasks**: Shows any task with a priority above Normal.
Search for tasks	Searches for tasks in the task list. **Note:** Search might not be available depending on configuration.	At the top of the Workflow task list widget, use the Search toolbar to search task list **Subject** or **User**.
Acquiring a task	Confirms that the task has been read and received.	In the Workflow task list widget, open a context menu for a task, and select **Acquire task**.
Accepting a task	Confirms that the task has been completed and its quality accepted.	In the Workflow task list widget, mouse hover over a task, or open a context menu for a task, and select **Accept task**, or select the custom task action label configured by the administrator.
Rejecting a task	Confirms that the task is completed or its quality was not acceptable.	In the Workflow task list widget, mouse hover over a task, or open a context menu for a task, and select **Reject task**, or select the custom task action label configured by the administrator.

Action	Description	To perform this action
Delegating a task	Sends the task to a specified user for acquiring, acceptance, or rejection.	In the Workflow task list widget, mouse hover over a task, or open a context menu for a task, and select **Delegate task**.
Adding a note to workflow or task	Adds a note that appears in the Task notes widget when the task related to the workflow is selected.	In the Workflow task list widget, open a context menu for a task, and select **Add a note to the workflow**.
Changing task priority	Changes the priority level of the task. Priorities are used primarily for filter or sorting purposes.	In the Workflow task list widget, open a context menu for a task, select **Change priority**, and select a priority level.
Toggling read or unread status of a task	Changes the read or unread status of the task.	In the Workflow task list widget, open a context menu for a task, and select **Set task as unread** (or read).
Update performers	Depending on workflow configurations, use to change the participants list of the task.	In the Workflow task list widget, open a context menu for a task, and select **Update performers**. Alternatively, in the Workflow overview widget, select a workflow in progress and select **Update (its) performers**.
Manage workflow attachments	Allows user to add or remove attachments.	In the Workflow task list widget, open a context menu for a task, and select **Manage workflow attachments**. If multiple documents are sent to a workflow, the master document concept does not apply. Hence, functionality needing master documents like task labels, task description, task category, and so on, will not have document specific placeholders. However, if a single document is selected in a workflow, the master document concept works as before.

You can abort a workflow and refresh the list of workflow tasks assigned to you as described in the following table:

Action	Description	To perform this action
Refreshing the Workflow task list widget	Recent notifications do not show up until the task list is refreshed.	In the Tasks browser widget, click a folder.
Aborting a workflow	Closes the workflow. Administrators and the supervisor of a workflow can perform this task.	In the Workflow task list widget, right-click to open a context menu for a task, and select **Abort workflow**.

Related Topics —

Understanding Lifecycles, page 119
Example of a Workflow and a Lifecycle, page 125
Understanding the Differences Between Workflows and Lifecycles, page 124
Sending Content by email from D2, page 130
Sending Content to a Workflow, page 127
Understanding Virtual Documents, page 82
Understanding Content, page 49
Understanding Lifecycles, page 119

Understanding the Differences Between Workflows and Lifecycles

The following table describes key differences between a workflow and a lifecycle:

Workflow	Lifecycle
Composed of workflow tasks.	Composed of content states.
The order of progression through a lifecycle is handled by the workflow. Each task is able to set a resultant state, regardless of the intended lifecycle sequence.	Progresses in sequential order as dictated by each state.
Passes content from one state to another using an approval process for each task; tasks can be acquired, accepted, rejected, or delegated.	Passes content from state to state using a set of criteria that must be met before content is accepted for the new state. Each lifecycle state may optionally have prompts.
Administrator controls can simplify the workflow process through methods such as task automation and delegation.	Every level of lifecycle state progression requires manual input. Administrators can configure lifecycle batches to automate progression of content.

Workflow	Lifecycle
Supports commenting, a limited degree of tracking, multiple participants, and linking to other content. A workflow task is typically configured to be user-specific.	Does not track comments, lifecycle states, or attachments. A lifecycle is isolated to a single instance of content, and therefore ignores user specificity.
Does not control content retention or markup policies. Cannot create renditions.	Controls content retention and markup policies. Can be configured to create renditions.

Related Topics —

Understanding Lifecycles, page 119
Example of a Workflow and a Lifecycle, page 125
Understanding Workflows, page 121
Sending Content by email from D2, page 130

Example of a Workflow and a Lifecycle

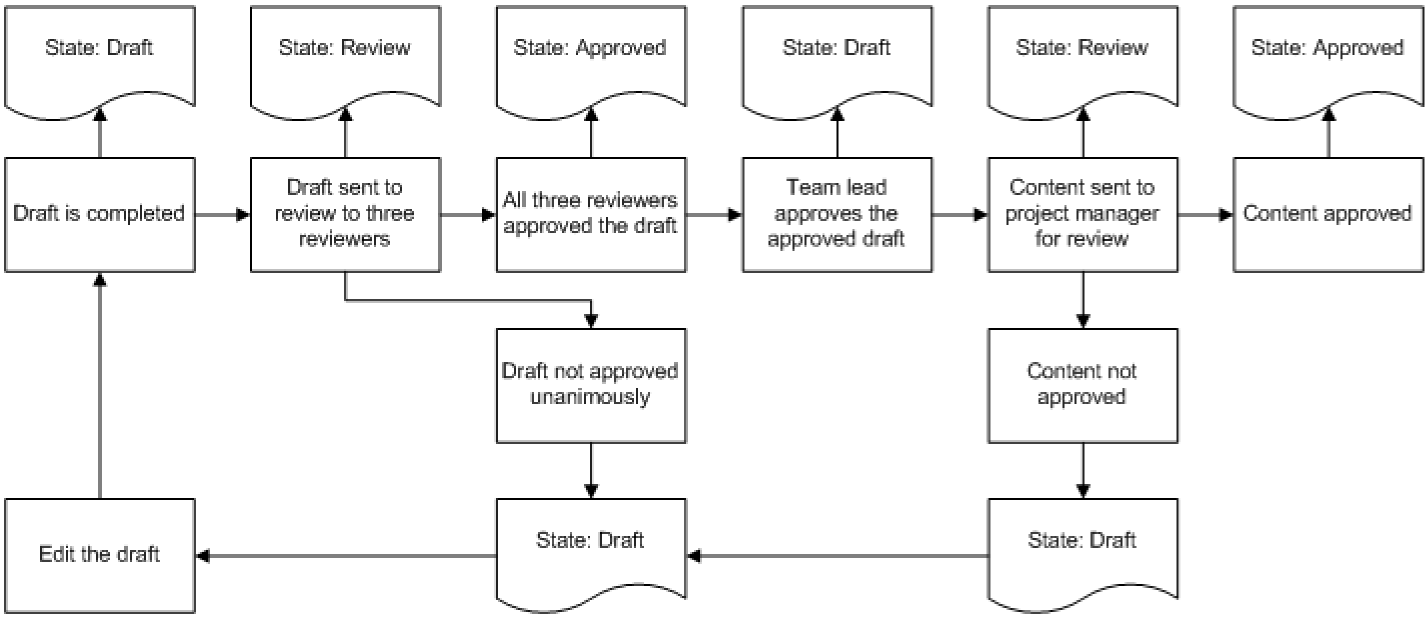
The following are examples of a simple review process lifecycle and a complex review process workflow. The example of the workflow uses the simple review lifecycle and add business processes to create a complex review process.

Example 7-1. Lifecycle example: Simple review process
The following figure illustrates three states of a simple review lifecycle and their sequential order:

The simple review process has three states that denote the content as being a draft, under review, and having completed the review process. The lifecycle allows you to iterate between the Draft and Review states until the reviewer approves the draft.

1. The content is initialized as **Draft**.
2. The content is promoted to **Review**.
3. The content can either be:
   - Demoted back to **Draft**. Go to step 1.
   - Promoted to **Approved**. The user must fill out the approval dialog box.

Example 7-2. Workflow example: Complex review process
The following figure illustrates how a workflow can use the simple review process and add complex business processes to expand the review process:



For example, in a situation where you have more than one level of reviewers, you would configure a business process that involves at least two cycles through the review lifecycle. The resulting workflow uses the three states of the example lifecycle (Draft, Reviewed, Approved) to conduct the business process.

1. Upon completion of the draft, the workflow sets the content state to **Draft** and sends the content to the designated three reviewers.
2. If the reviewers:
   a. Do not unanimously approve the draft, the workflow sets the state to **Draft**, and sends it back to the beginning.
   b. Approve the draft, the workflow sets the content state to **Approved**, and sends the content to the team lead.
3. When the team lead has approved the draft, the workflow sets the state back to **Draft**.

The approval process repeats itself for review by the team lead and project managers. As a result, the content goes through the same lifecycle phases twice, but only a single workflow. In this scenario the content moves back two steps at least once, from an **Approved** state to the **Draft** state. In this way, the workflow adds complexity and control to a lifecycle to perform complex business processes.

Each step provides the task performer with the option to add comments. These comments enable people following the workflow to understand what transpired over the course of the workflow.

Related Topics —

Understanding Lifecycles, page 119
Understanding the Differences Between Workflows and Lifecycles, page 124
Understanding Workflows, page 121
Sending Content by email from D2, page 130

Sending Content to a Workflow

1. Right-click content to open the context menu, select **Send to workflow**, and select a workflow template.

   You can select multiple documents and initiate a workflow. If one or more of the selected documents do not comply with the selected workflow rules, the workflow does not start and an error message is shown. You can click **Continue** to send the qualifying documents to workflow, removing the non-qualifying documents from the list. Or, you can **Cancel** the action to change the selections.

2. On the **Recipients** tab, type user names into the participant group fields.

3. On the **Notifications** tab, type a workflow note into **Notification for all the recipients**. This field adds a note to the Task notes widget. If the field is blank, the workflow does not send a note.

4. On the **Attachments** tab, add additional **Workflow Documents** and **Attachments** required for processing workflow tasks. Select one or more documents or attachments to add to workflow.

   Click the **Attach Relations** icon to select documents that are related to your selected file for inclusion in the workflow. Depending on your D2 configuration setup, you might be able to find the content in one or more ways, such as simple search or repository folder browsing.

   Note: The performer of the workflow task should have at least browse permission on the workflow documents and attachments.

5. On the **Planning and Follow-up** tab, specify scheduling properties as described in the following table:

Field	Description
Automatic launch on	If you do not want the workflow to start immediately, select a starting date for the workflow.
Send notification when the workflow is started	Select to receive an email notifying you when the workflow begins.
Send notification if the workflow is not ended by	Select a date to receive an email notifying you if the workflow has not ended by the selected date.

6. Click **OK**.

Related Topics —

Understanding Workflows, page 121

Using the Delegations Widget

Use the Delegations widget to view, create, edit, and delete delegations. You can create new delegations, view and edit properties of the selected delegations, and manage the status of the delegations. Each delegation is displayed as a row in the widget. An icon in the beginning of each row represents the status of the delegation. The icon changes when the status of the delegation becomes active. The following table describes the fields shown in the widget:

Name	Description
User	The name of the user who is delegating the workflow.
Delegate	The name of the user who will perform the workflow.
Begin	Start date of the delegation.
End	End date of the delegation.
Status	Current status of the delegation. The status could be Pending, Active, or Inactive.
Workflow	Workflow labels of each workflow selected in the delegation properties.
Description	Delegation details.

In order to display the default columns in the delegations widget, the user preferences (d2c_preferences) need to be deleted. For example, if status column is not appearing on the screen for a user, then the administrator can delete the d2c_preferences of the user to display the column in the delegation widget.

You can create new delegations and view or edit properties of the existing delegations using **Delegation Properties** dialog. You can use **New Delegation** or **Properties** button to launch the Delegation Properties dialog. You cannot edit the properties of a delegation when the delegation is in active state.

Right-click context menu allows to perform **Undo** or **Delete** actions for a delegation. You can click **Undo** to recall all the tasks back to the original assignee that are not already accepted or completed by the delegate. Undo can only be performed on the active delegations. The delegation becomes inactive after invoking Undo. You can click **Delete** to remove the selected delegation from the list.

Understanding Distributions

You can use the distribution function to send content to multiple users. For example, when content reaches a review phase in a lifecycle or workflow, you can send the content through a distribution to a wider audience. D2 does not require review and approval by the undesignated performers, but you can use the distribution to receive additional reviews. Administrators configure distributions to define a list of recipients, a subject and body of the email, and a property form.

Depending on how this was configured, you may also need to complete an electronic signature when sending out a distribution.

You can control distributions as described in the following table:

Action	Description	To perform this action
Send a distribution	Distribute content to a predefined list of recipients.	In a list widget, right-click on context to open a context menu, select **Distribution**, then select a distribution. Fill out the participant lists, then click **Prepare**.
Generate a distribution report	Generate a distribution report, which creates a table of recipients and their response to the distribution as either **Accept** or **Reject**. D2 outputs the response **No access permission** if the respective user does not have access privilege to the content.	In the Relations widget, right-click a distribution and select **Generate distribution report**.
Edit the participants list	Edit the list of recipients for distributions.	In the Relations widget, right-click a distribution and select **Properties for this distribution**.

You can perform distribution tasks as described in the following table:

Action	Description	To perform this action
Request a distribution	If you are a listed participant of the distribution, you must request a distribution to accept the distribution task. When you request a distribution, the distribution appears in the Distribution widget, and you can perform acceptance actions on the distribution. **Note:** Launching a distribution from the Relation widget will take the version of the document you selected as the target for distribution, not the current version.	In the Relations widget, right-click a distribution and select **Request this distribution**.
Refresh the list of distributions	Refresh the Distributions widget to see the content sent to you for review.	In the Distribution widget, click the menu button in the widget tab and select **Refresh**.

Action	Description	To perform this action
Accept or reject a distribution	Accept or reject distributions.	In the Distribution widget, right-click a distribution and select **Accept** or **Reject**.
Stop a distribution	The person who requested a distribution can stop a distribution currently in progress.	In the Relations widget, right-click a distribution with the description **In Preparation** and select **Stop this distribution**.

Related Topics —

Understanding Content, page 49

Sending Content by email from D2

1. Right-click one or more content and select **Send mail**.

   D2 Client does not show the menu option if the selected content do not have a smart link or if no mail server is configured.

2. Fill out the email form as described in the following table:

Field	Description
To	Use the list controls to add or remove users and groups to the list of recipients. If allowed by administrator configurations, you can manually add email addresses by clicking **Add email addresses**.
Subject	Type or edit the subject of the email. Administrators may have configured a template subject.
Message	Type or edit the body of the email. Administrators may have configured a template body. D2 automatically lists the smart URL of selected content in the **Message** field. If you selected multiple content, the list includes the **`object_name`** attribute as a label for each link. If D2 is deployed on an IP address such as **`http://10.20.30.40:8080/D2`** instead of a domain or host name, Microsoft Outlook may flag the resulting email message as a phishing attempt.

3. Select **Attach file to email** to include the selected content as an attached file. Selecting this option does not remove the list of smart URLs in the body of the email. D2 hides this option if you selected a folder, if you selected more than one content, or if administrators disabled file attachments.

   If you selected **Attach file to email**, select the **Rendition format** of the attached content.

4. Click **Send**.

Related Topics —

Understanding Lifecycles, page 119
Example of a Workflow and a Lifecycle, page 125
Understanding the Differences Between Workflows and Lifecycles, page 124
Understanding Workflows, page 121

Chapter 8

Troubleshooting

Bad User Password when Opening Password-Protected PDF with C2 View Configuration

Problem

Configure a View Configuration using C2.

Import a password-protected PDF file.

Right-click the imported file and select **View**.

D2–Downloader shows the error **`Bad user Password`**.

Cause

C2 not compatible with password-protected PDF files.

Resolution

Use **View original content** for password-protected PDF files.

Workflow Package Name is Null or Empty

Problem

The **`package name is null or empty`** error appears when trying to send a content to a workflow without attaching a package when requested.

Attempting to send the content to workflow again with an attached package still results in the error message.

Cause

A faulty workflow template was used in creating the workflow.

Resolution

Notify your administrator.

Javascript Error when Attempting Access

Problem

A Javascript error prevents you from accessing D2.

Cause

In Internet Explorer, the option **Let Internet Explorer decide** for popups is not selected.

Resolution

Go to **Tools** > **Internet Options** and select **Let Internet Explorer decide**.

If you do not have the privilege to change this setting, add **`?newWindow=false`** to the end of the D2 URL.

For example, **`http://<server address>/D2?newWindow=false`**

Known Issues with Accessing D2 Client on Mac iOS and Apple Safari

Because of issues with how Apple Safari handles network latency issues, the following issues can occur when accessing D2 Client on Mac iOS and Apple Safari:

- The Workspace gallery and Widget gallery do not appear, and tapping on the corresponding window only causes the title bar to blink rapidly.
- Expanding a folder in the Repository Browser widget can take an unexpectedly long time and occasionally result in a D2 **`Failure 0`** dialog box. This occasionally prevents data recovery and forces you to clear the Safari caches and cookies before logging in to D2 Client again.
- The menu items for adding or removing a widget from a tab or accordion group can disappear. You must refresh the page to restore the menu items.