




Module 1 — D2 Client

	Estimated Time: 30 minutes
Goals	Perform document management specific operations on the Docbase with D2 client
Tasks	Connect to the Docbase Create a Cabinet Create folders Import Document View Properties Search Document Promote Lifecycle

These instructions are written for classes held at the Documentum training facility. Some instructions may differ for classes held at customer sites. Your instructor will point out any differences.

Docbase Name:

User Name:

Password:

Default Cabinet:

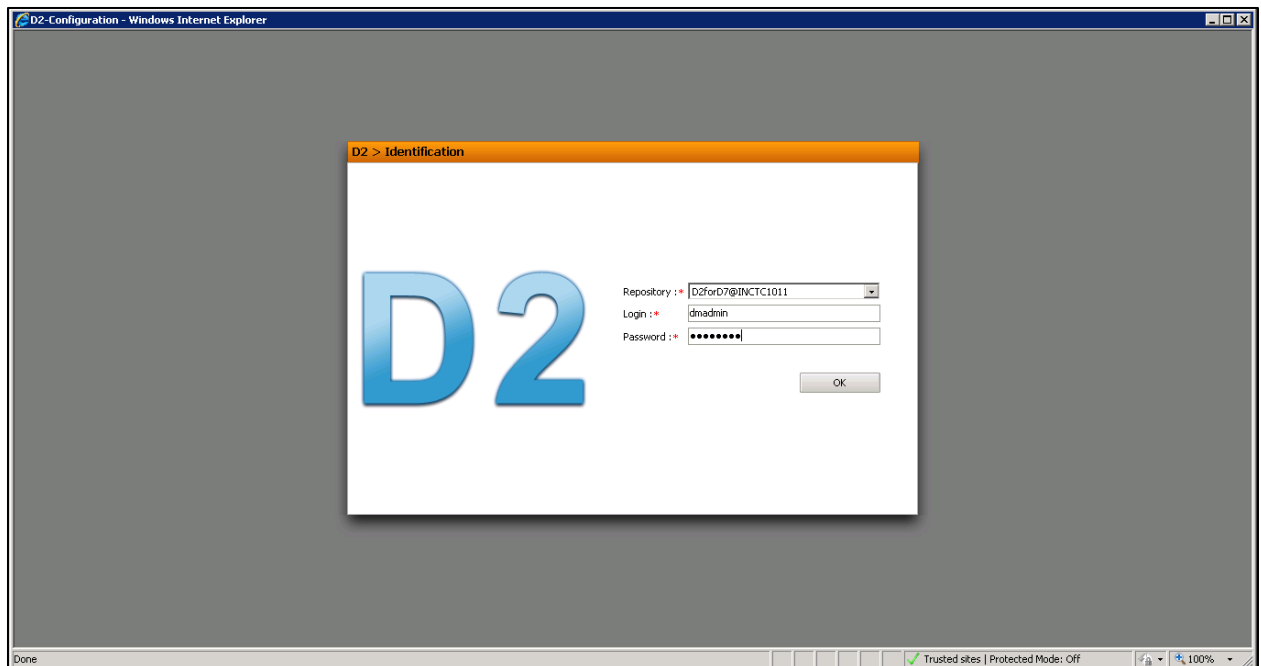
Case study – Where We Are

You have created a Case Study Application in D2. Get familiarize with D2 Client UI. Create a cabinet, folder and case study document in this D2 application.

At the end of the lab you should have created a new Case Study document in the correct location within the Docbase. You should also be able to search the newly created document.

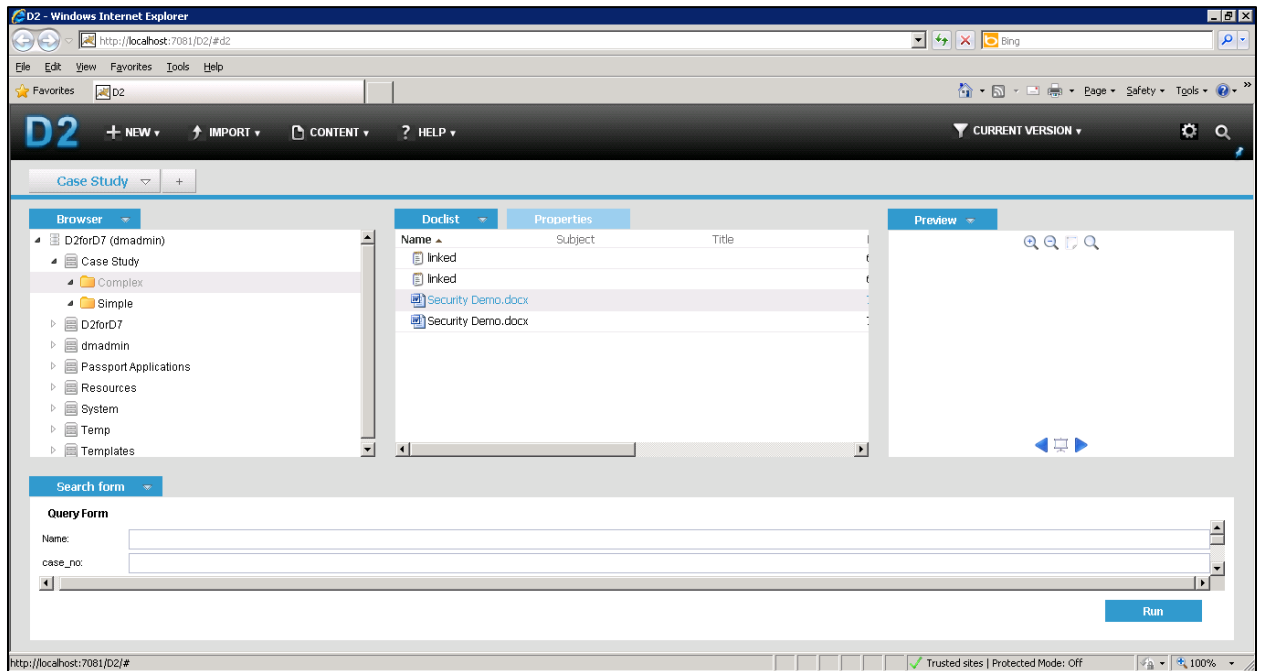
Connect to the Docbase

1. Launch D2 client in Internet Explorer.
2. Open the url <http://localhost:8080/D2> , you will get screen like below one:



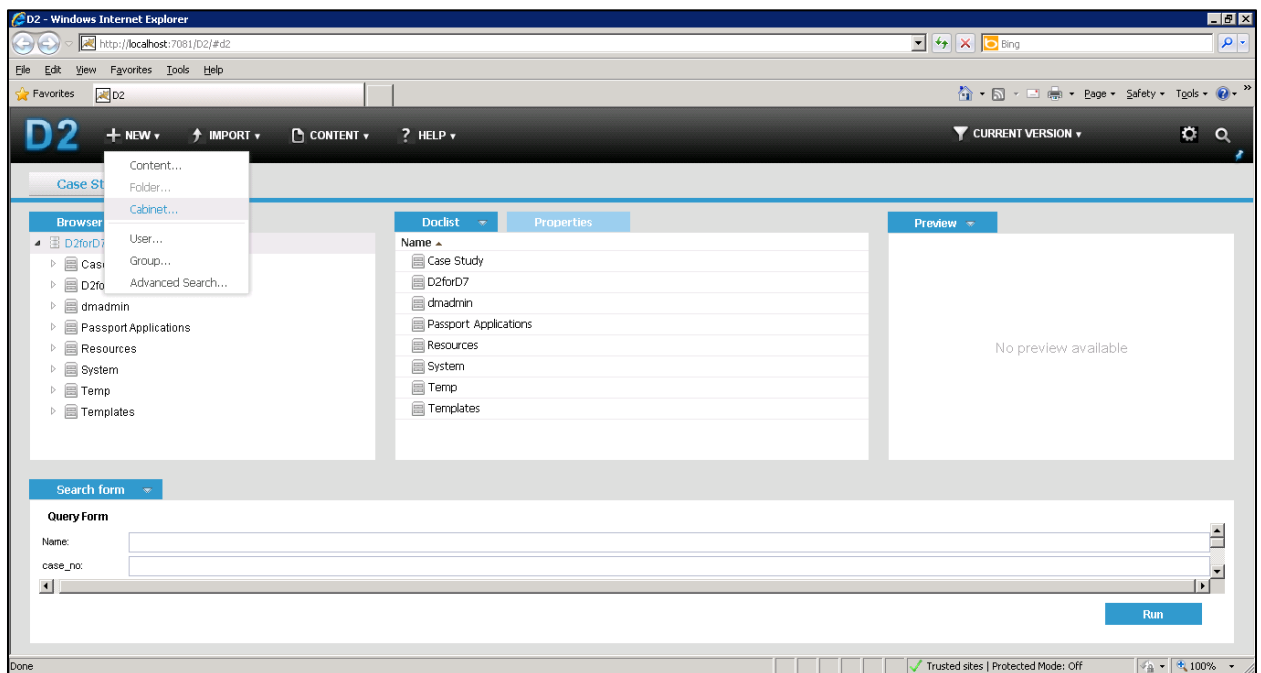
3. Select the repository
4. Provide the username/password and docbase provided by the trainer and click on OK. You will get the D2 Client UI.
5. You can see the various widgets – browser, doclist, properties, preview and search form. ©

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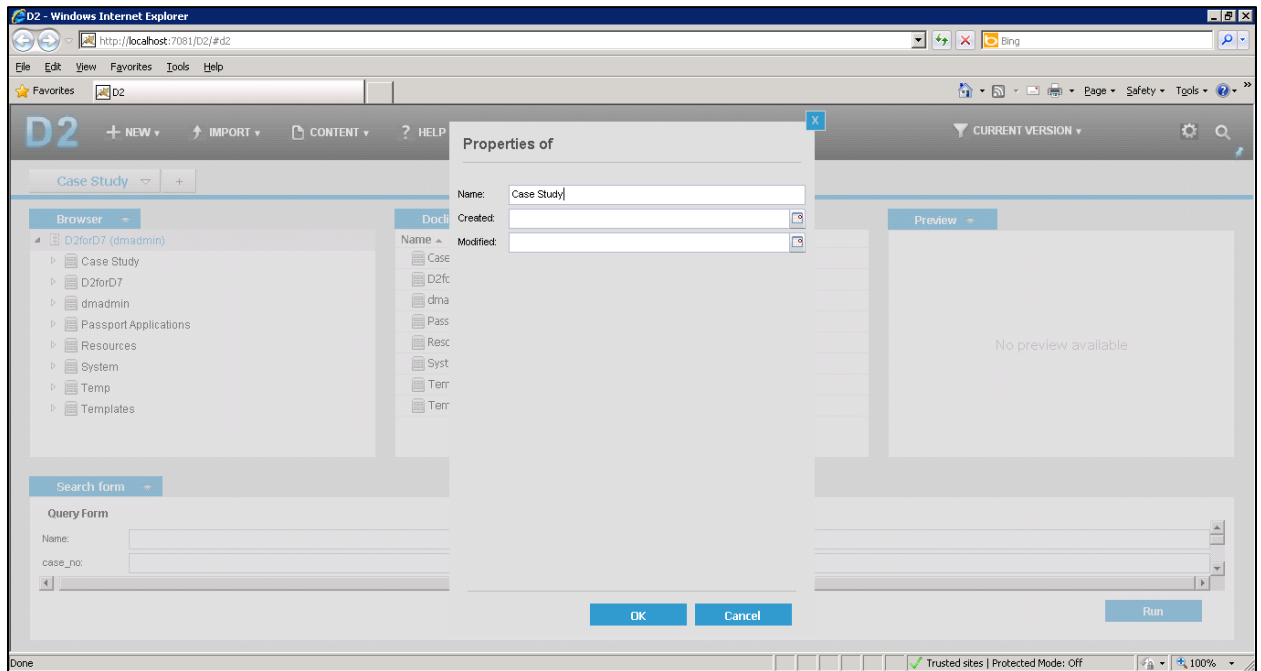
Create Cabinets

1. First, you will create cabinet Case Study in your repository.
2. Create a new cabinet using New→Cabinet.



3. Enter **Case Study** as the name of the cabinet.

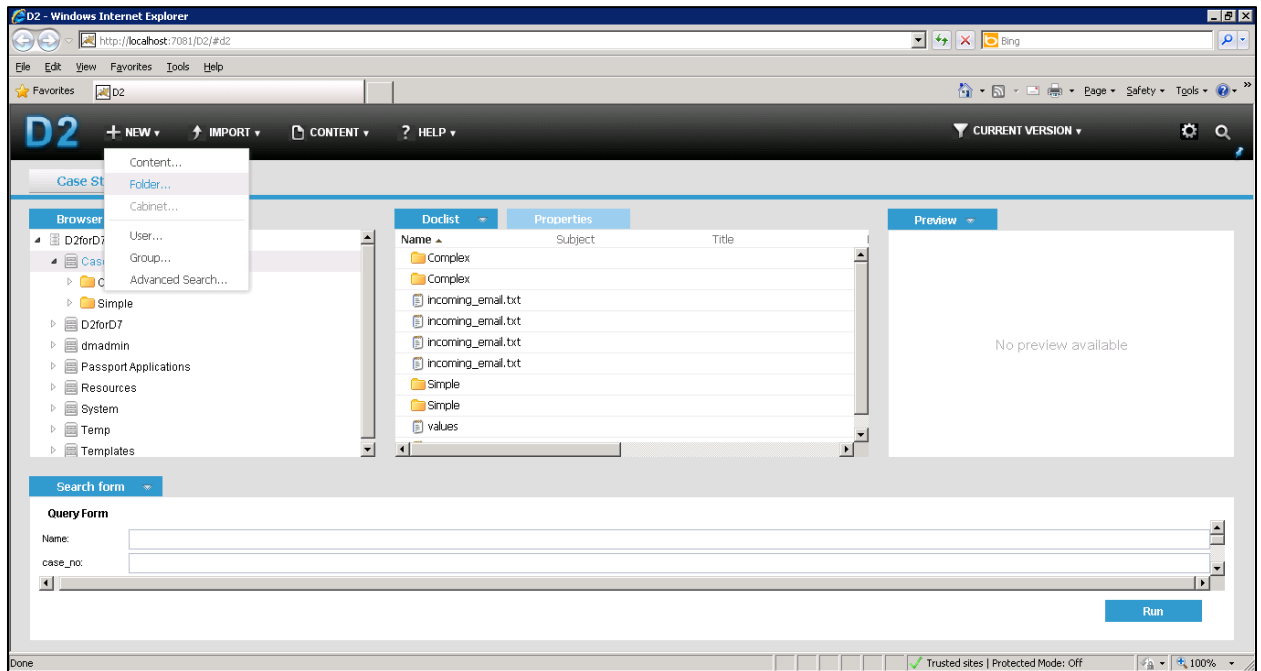
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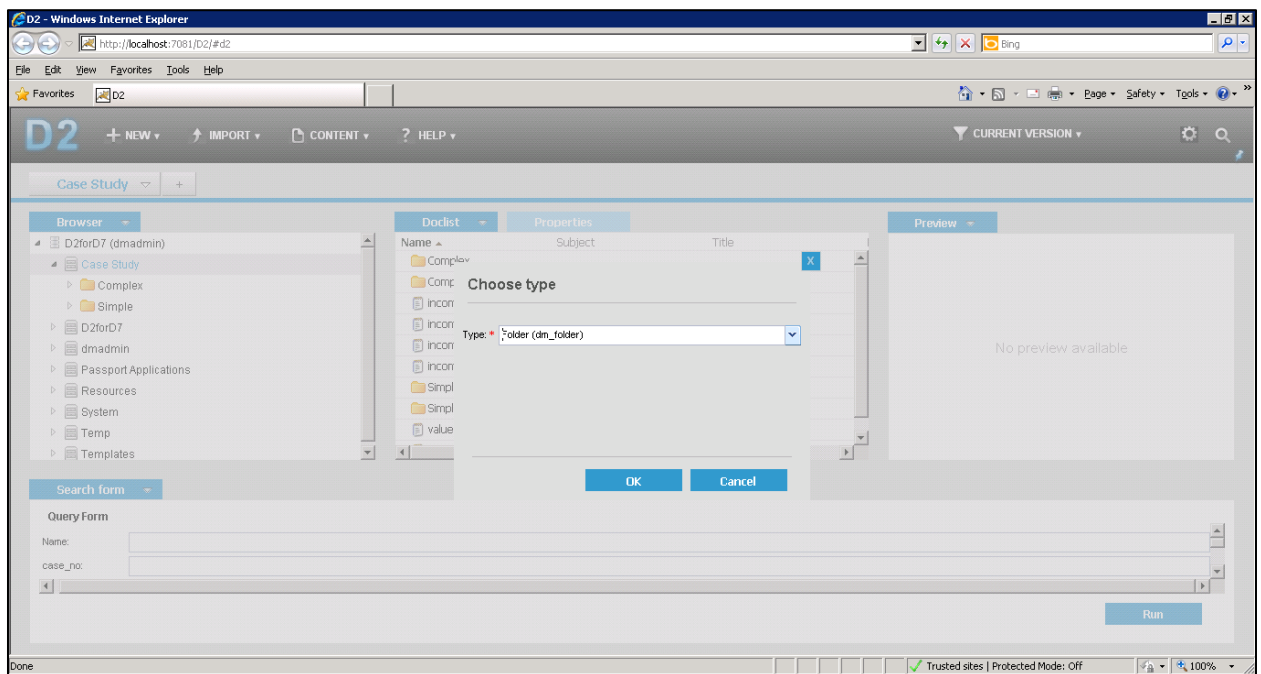
4. Click **OK**.
5. A new cabinet is created.

Create folders

1. First, you will create two folders in your Case Study cabinet. These two folders will hold the documents for the project.
2. With your cabinet selected in the **browser** widget on the left, create a new folder using New→Folder.

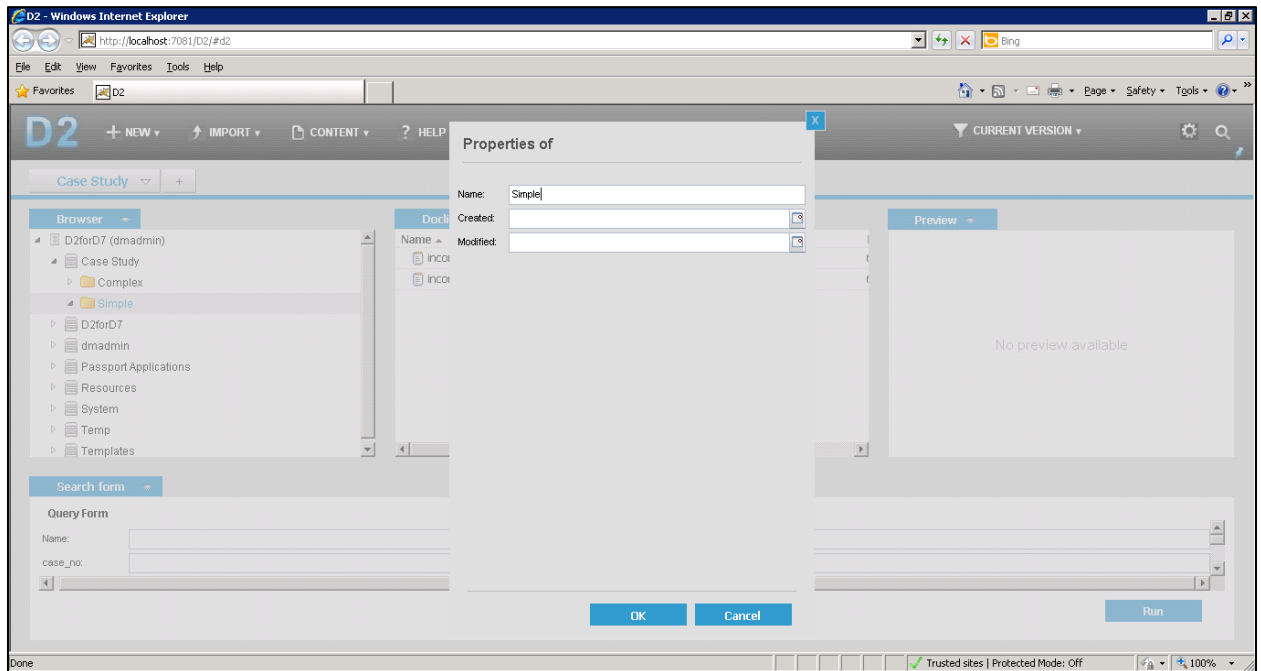


3. Select dm_folder as type of the folder.



4. Click **OK**.

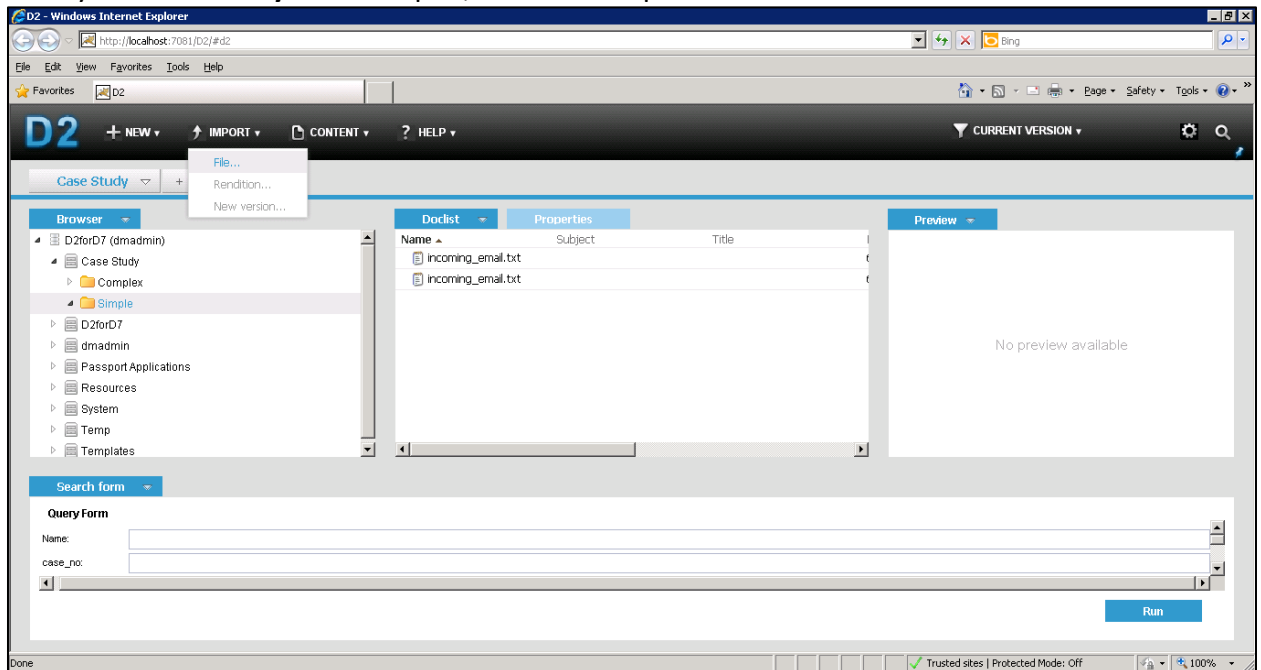
5. Enter name of the folder as Simple



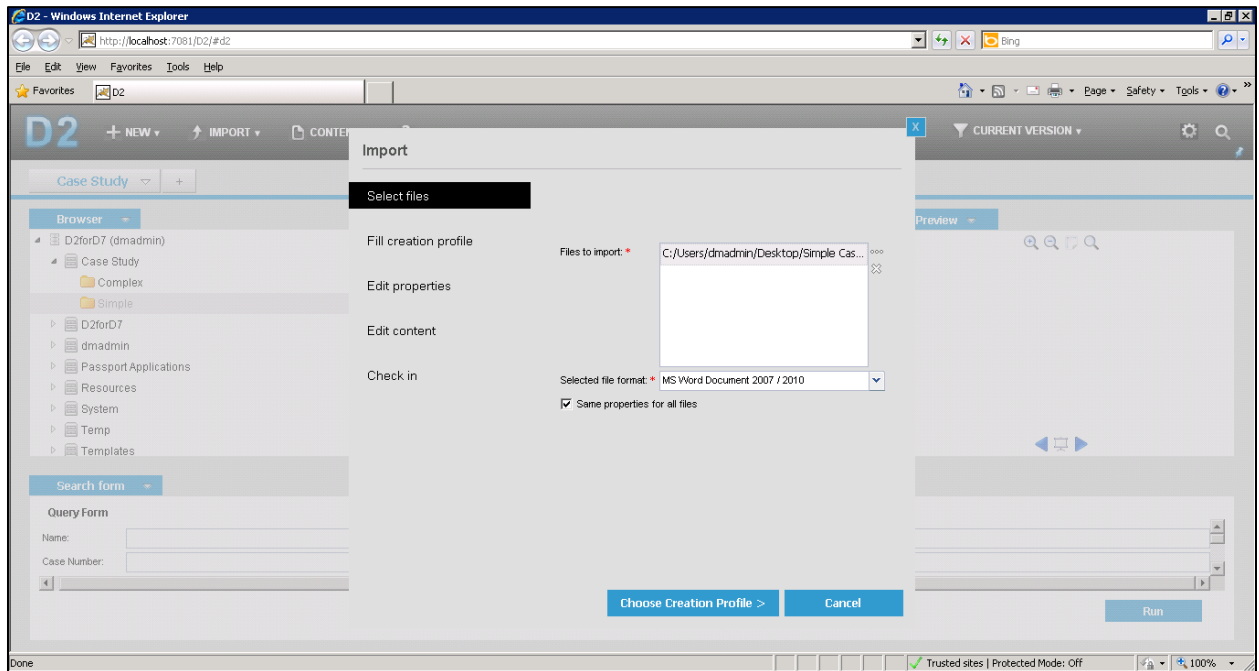
6. Create another folder in your cabinet and name it **Complex**.

Add documents to the folders

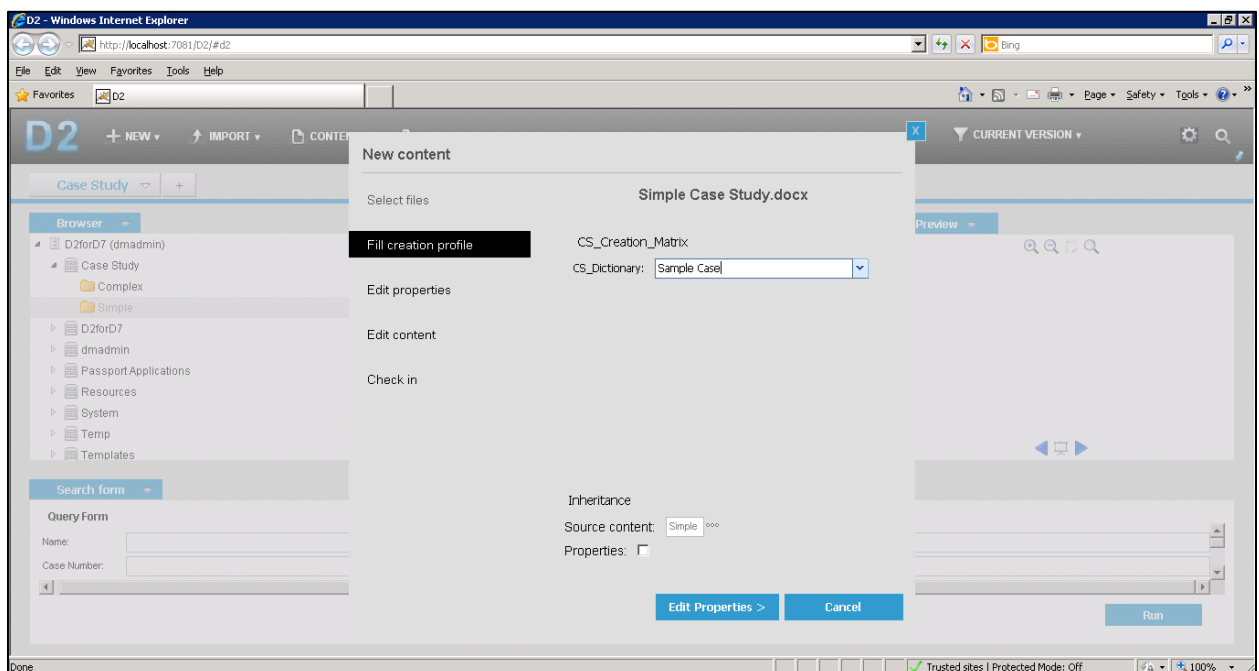
1. Now you will import a new case study document.
2. With your **Case Study** cabinet open, Go to the Import menu and select **New > File**.



3. Import dialog box appears. Browse and select a file to Import.

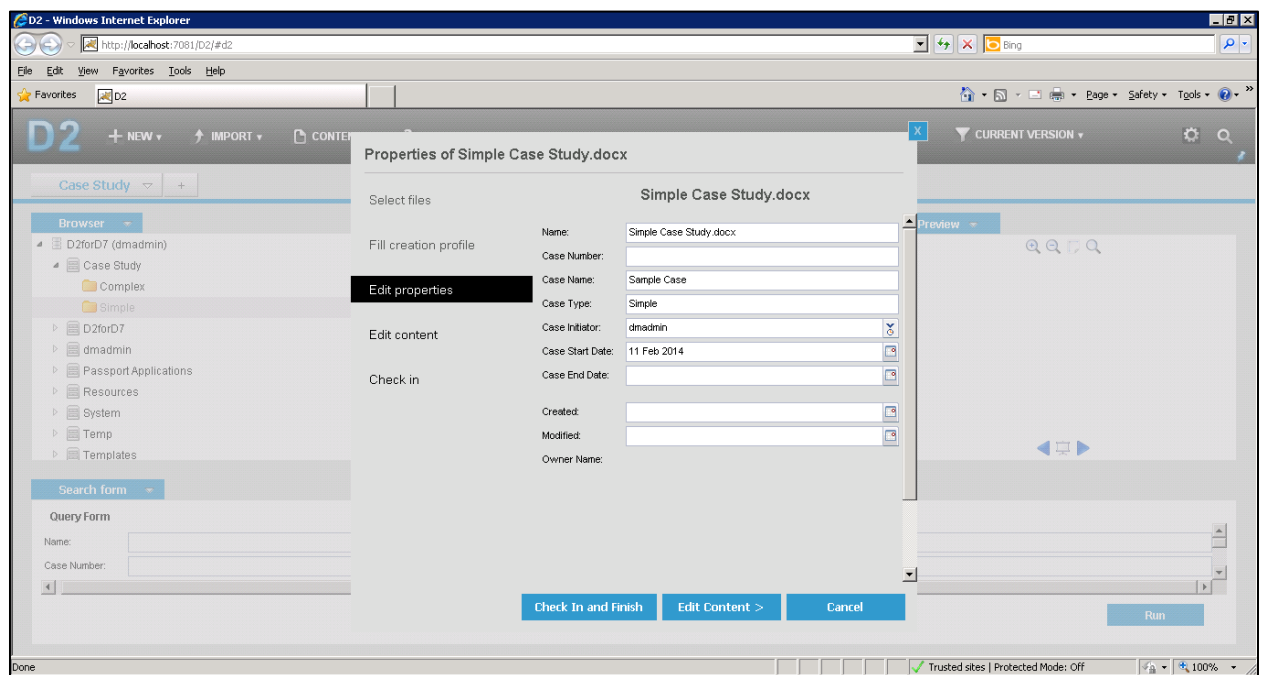


4. Select the type of document you want to create from the Case Study Creation Matrix dictionary.
5. If you select Complex case the document will be imported in Case Study → Complex folder. If you select Simple Case, the document will be imported in Case Study → Simple folder.
6. Click Edit Properties.



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7. Name gets populated from the imported file name. Other attributes are populated based on the default values template configured in the application.
8. Case Name → Dictionary value selected
9. Case Type → Simple / Complex based on value selected
10. Case Initiator → Logged in user
11. Case Start Date → Today's date

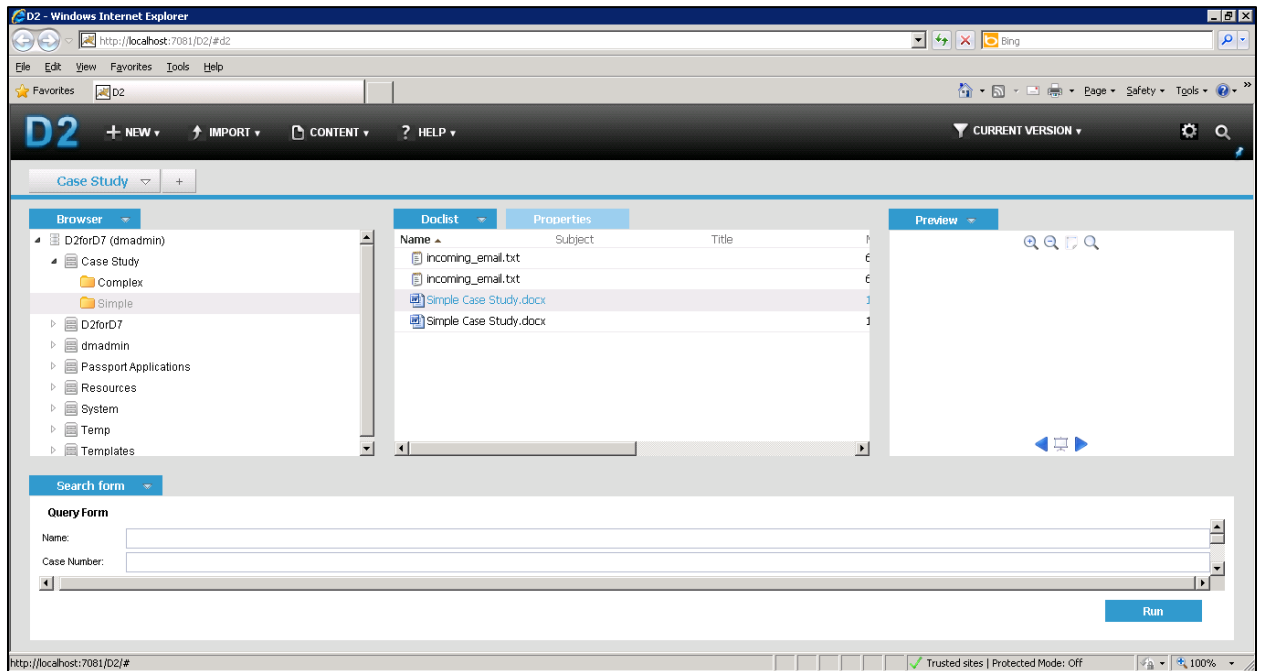


12. Checkin and Finish.
13. The document is created in Case Study → Simple folder.

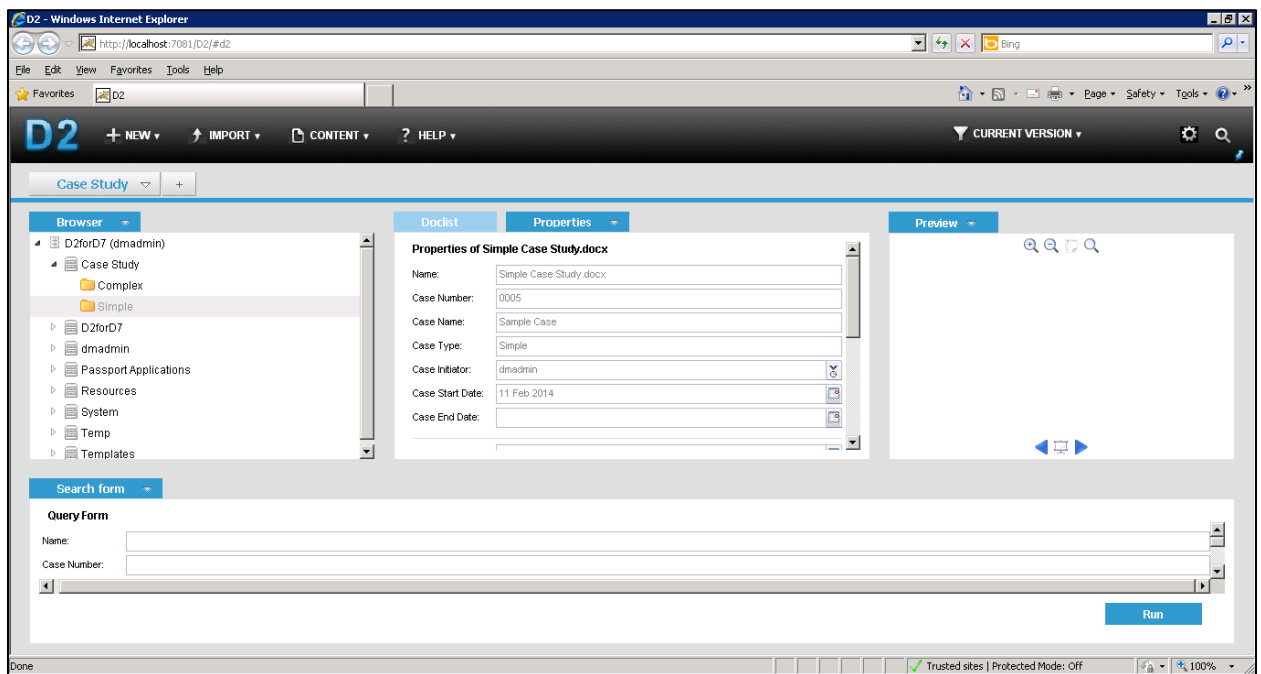
View Document Properties

1. Select the document in the doclist widget.

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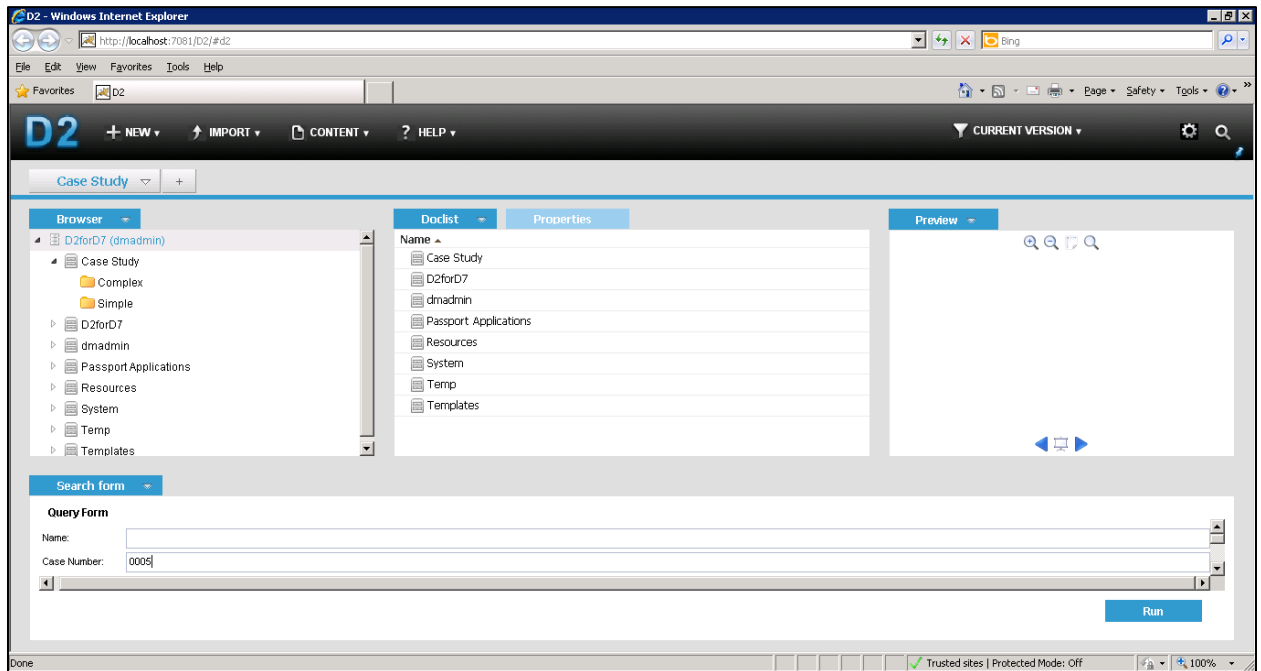
2. Click on the properties widget tab.



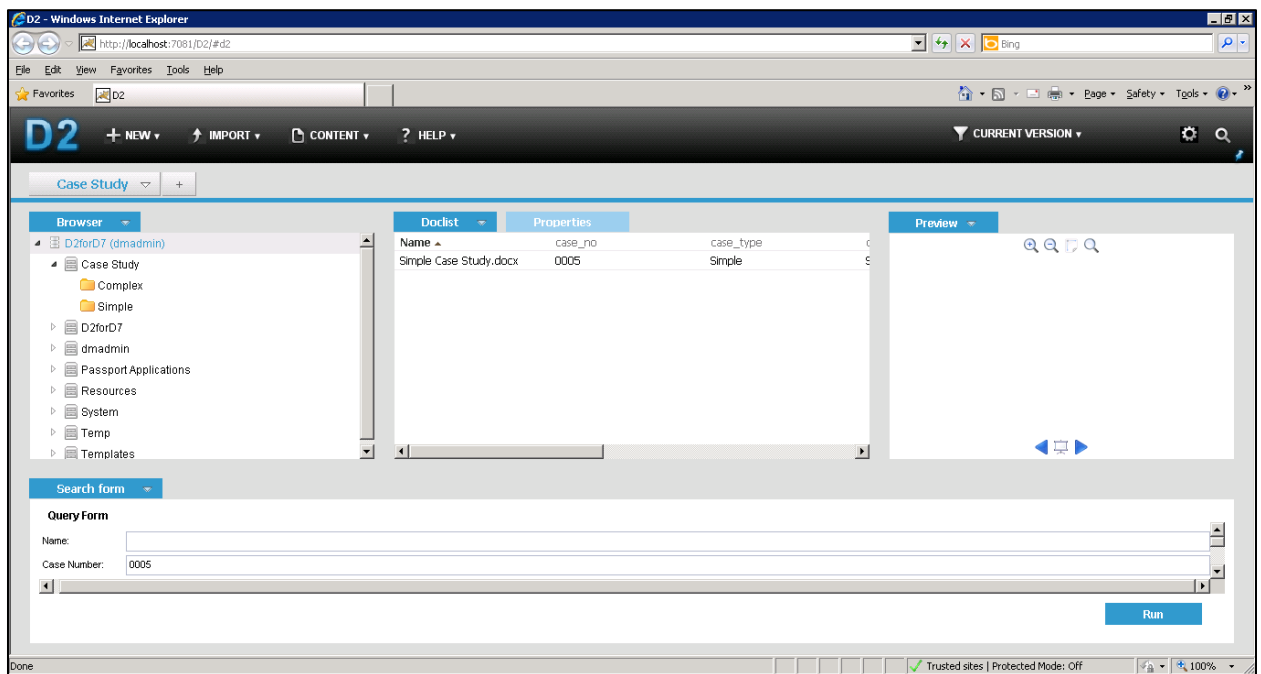
Search for the document

1. Search form widget on the bottom can be used for searching case study documents.
2. Type case number in the search form. Click Run.

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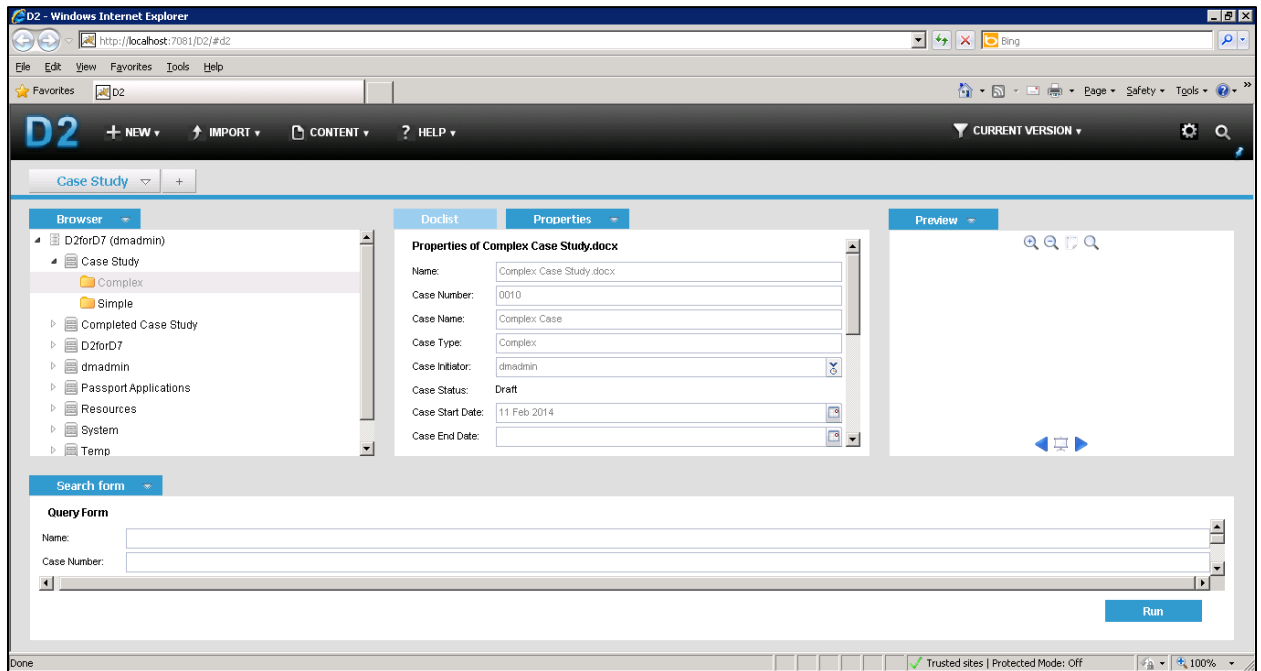
3. Search results are displayed in the doclist widget.



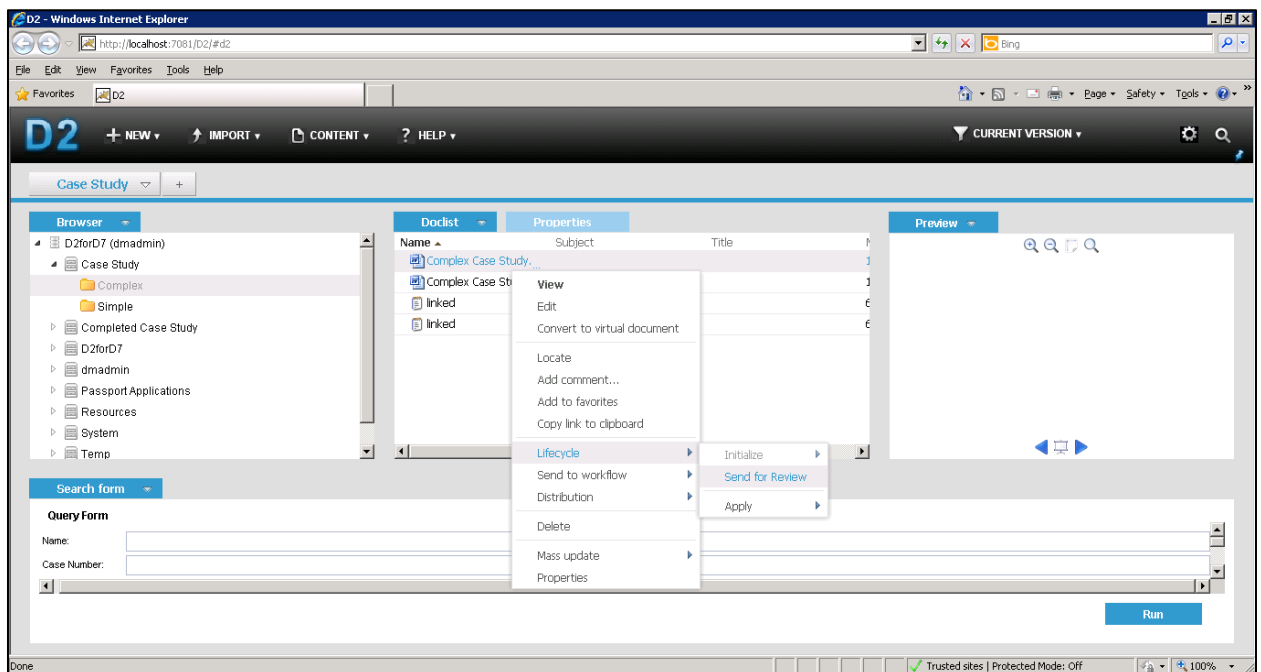
Promote Lifecycle

1. On creating a new document, CS_Lifecycle gets applied to it and the Case Status is Draft.

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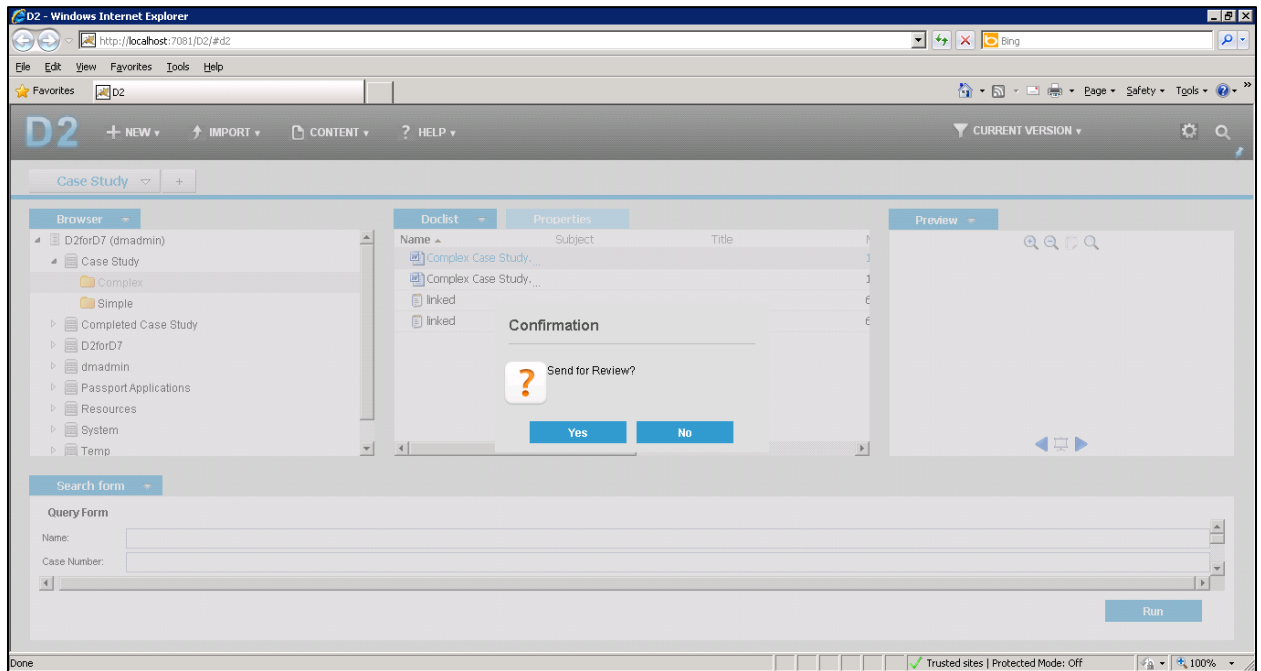


2. Right click on the document to promote to In Progress state
3. Click Lifecycle → Send for Review

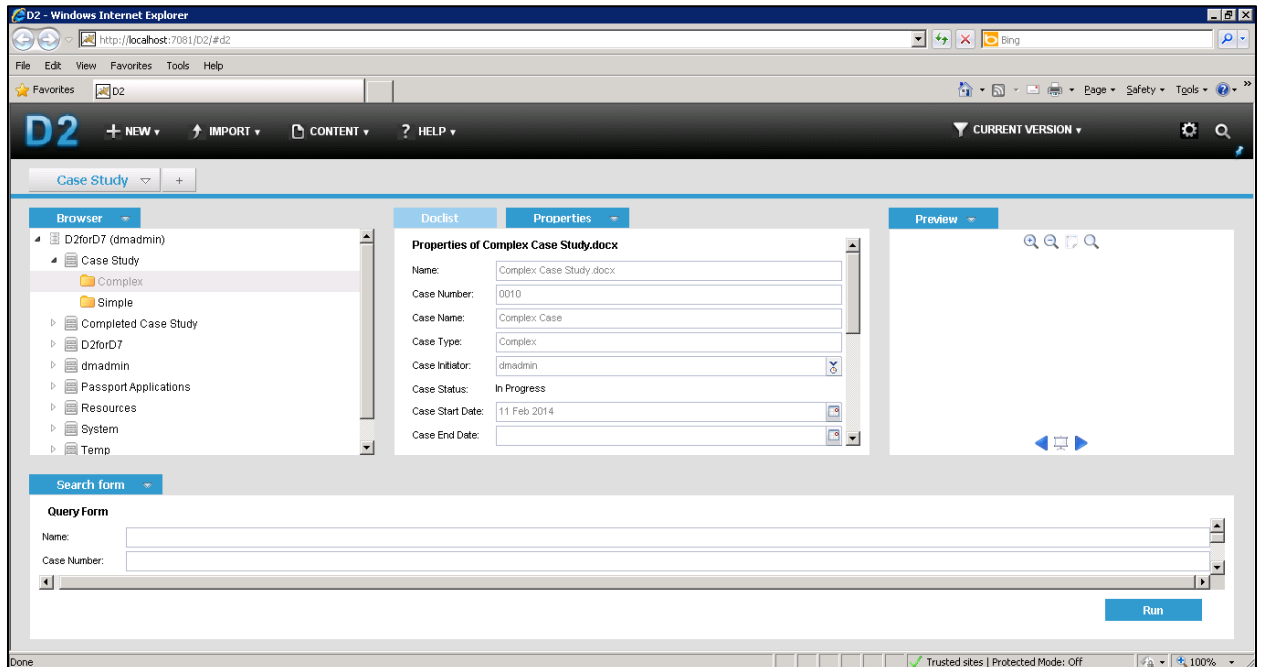


4. Click Yes

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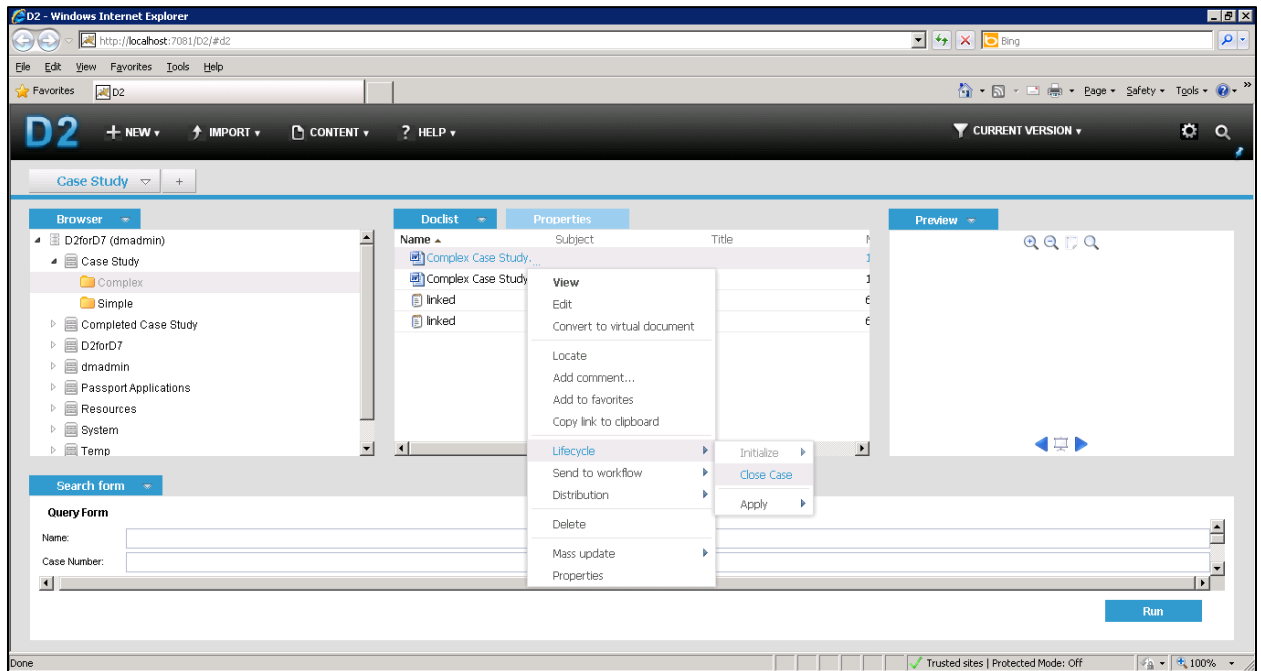


5. The document is promoted to In Progress state. Go to document properties to view the new state

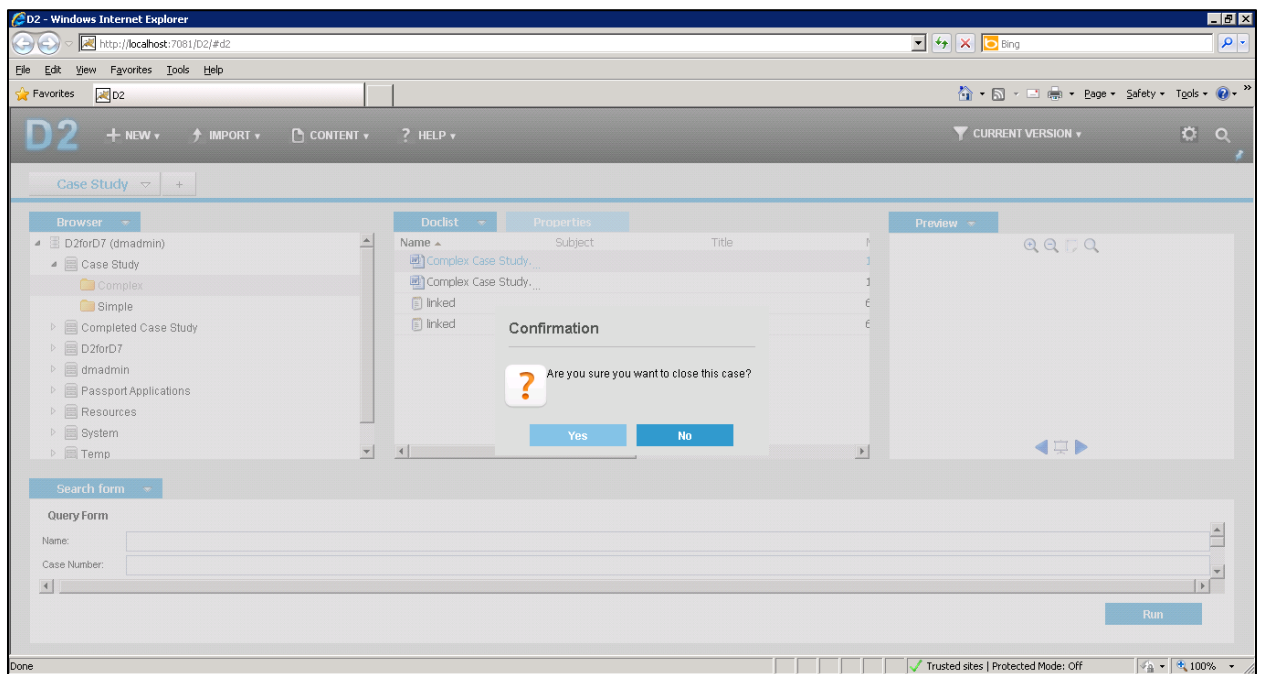


6. Right click the document to promote the document to Closed state.
7. Click Lifecycle → Close Case

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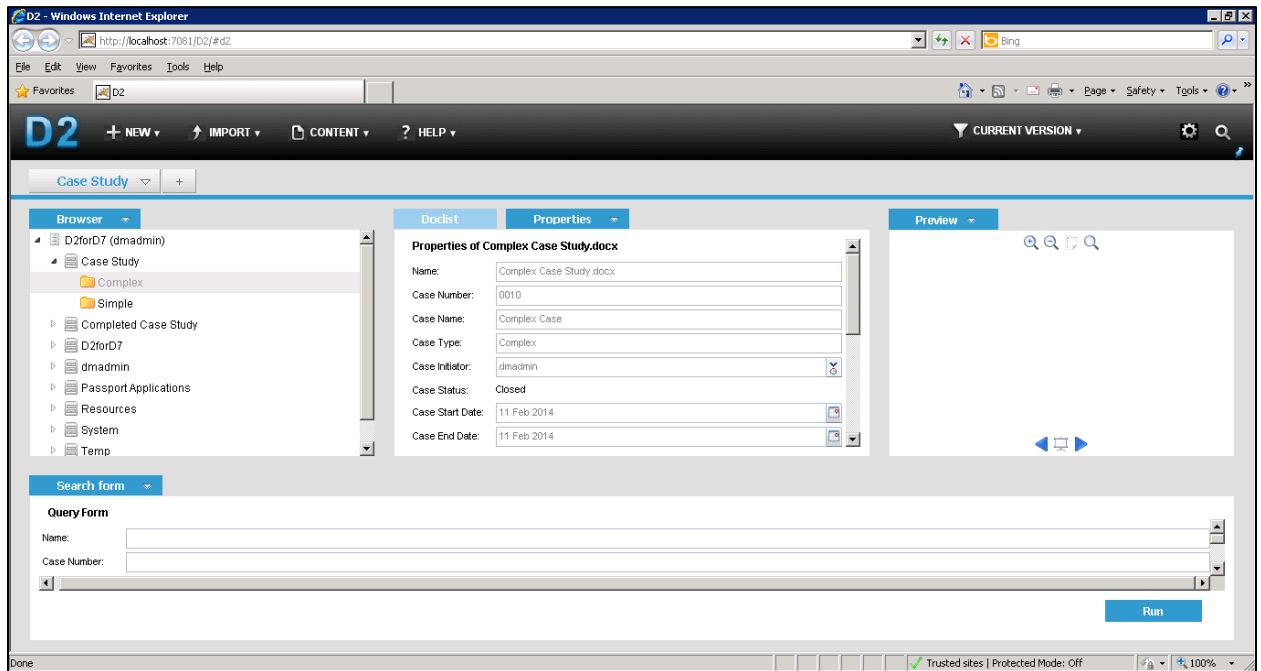
8. Click Yes.



9. The document is promoted to Closed state. The document status is updated. Case End date is set to today's date.

10. Go to document properties to view updated values

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End of Lab 1