


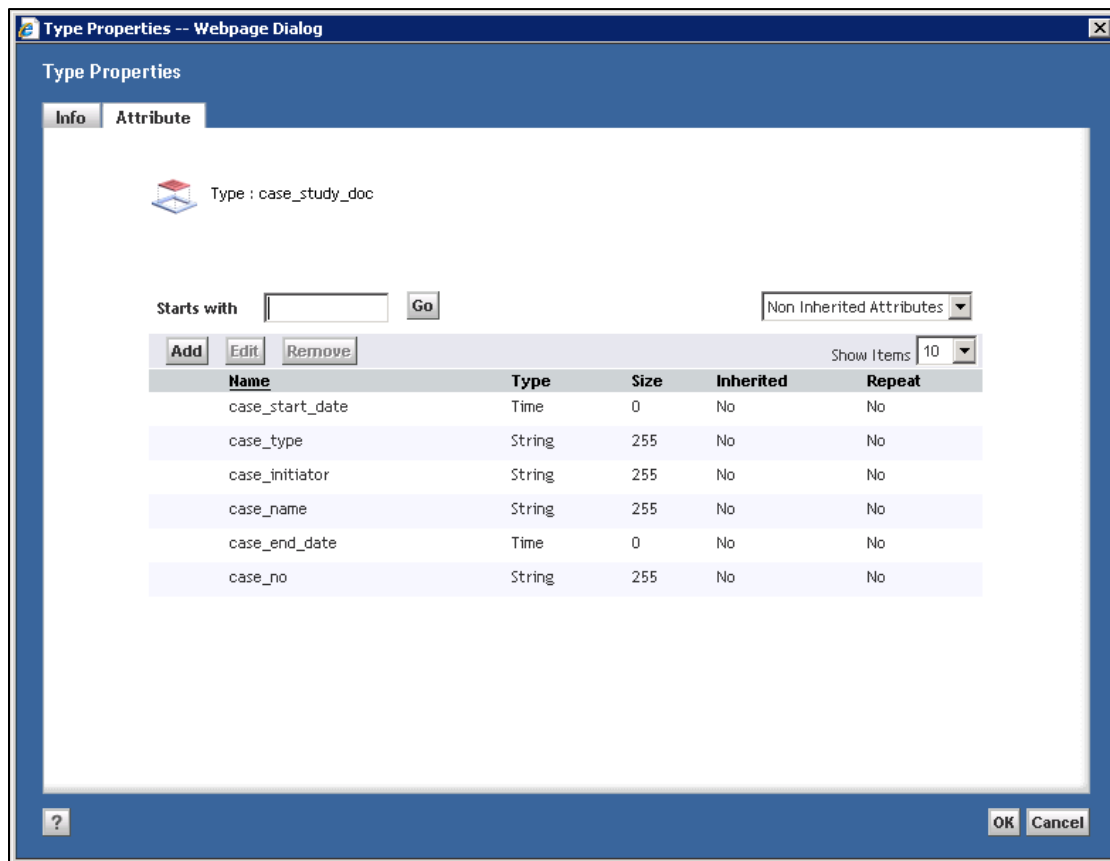
**Module 2 — D2 Config**

	Estimated Time: 4 hours
<b>Goals</b>	To configure D2 Case Study Application
<b>Tasks</b>	<a href="#">Login to D2-Config</a> <a href="#">Create new application</a> <a href="#">Create context</a> <a href="#">Create property page</a> <a href="#">Create dictionary</a> <a href="#">Create Inheritance</a> <a href="#">Create Default Value templates</a> <a href="#">Create Creation Matrix</a> <a href="#">Create Security</a> <a href="#">Create Auto Naming</a> <a href="#">Create Auto Linking</a> <a href="#">Create Search Form</a> <a href="#">Create Checkout</a> <a href="#">Create Theme</a> <a href="#">Create Widgets</a> <a href="#">Create Workspace</a> <a href="#">Configure Matrix</a> <a href="#">Create Lifecycle</a> <a href="#">Create Subscription</a> <a href="#">Create Audit</a> <a href="#">Export D2 Application</a> <a href="#">Import D2 Application</a>

## D2 Config Labs

### Case Study - Where We Are

We already have a Case Study document type created in the repository. A folder structure for storing these documents is already in place.



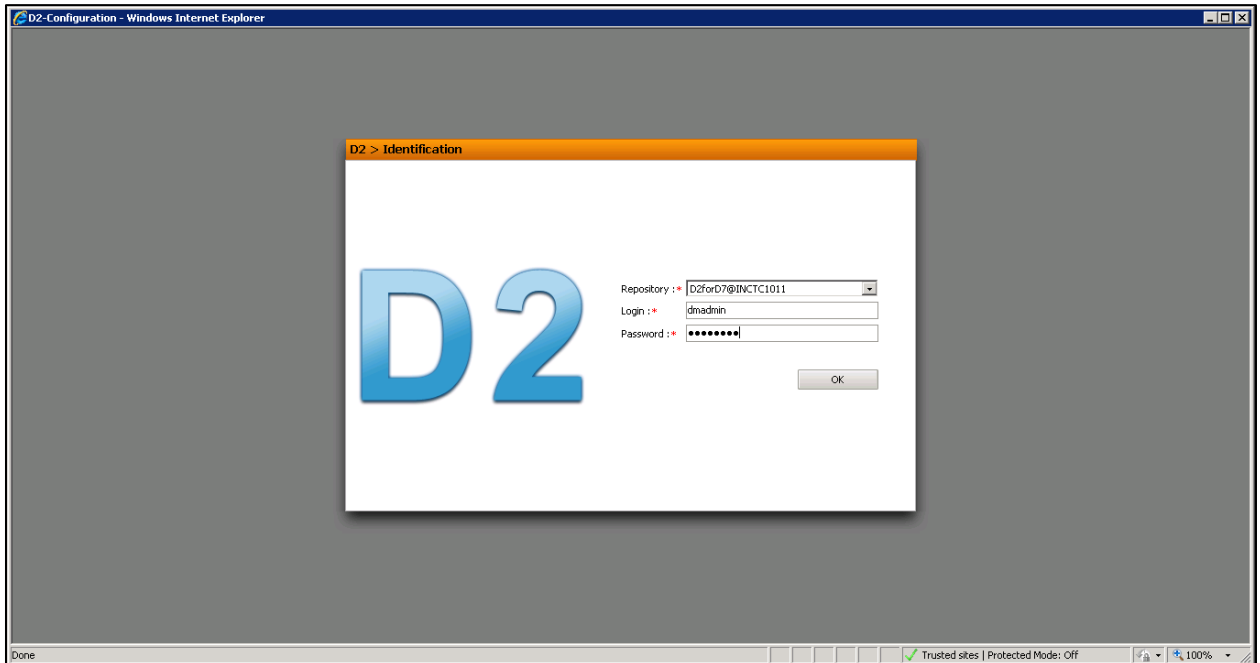
At the end of the lab you should have created a case study D2 application.

- This application allows you to import content for case study document type.
- You should be able to classify the case study type before importing the document.
- Based on the case study type the document should be imported in the appropriate folder.
- Case name, case type, initiator and start date should get populated by default using templates.
- Case number should be an auto number.
- You should be able to view all the custom properties of the case study document.
- You should be able to search the case study document using the case number.

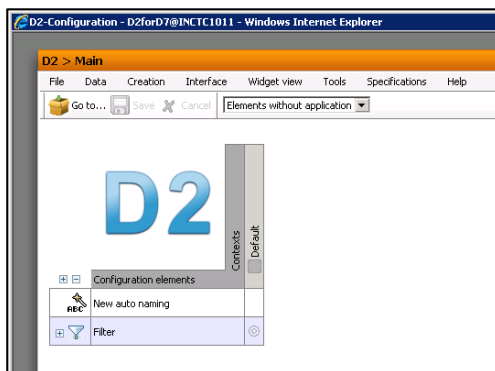
## D2 Config Labs

### *Connect to D2-Config*

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



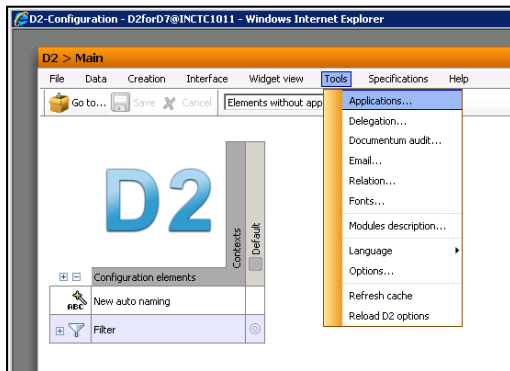
3. Select the repository
4. Provide the username/password and docbase provided by the trainer and click on OK. You will get the D2 Config UI.



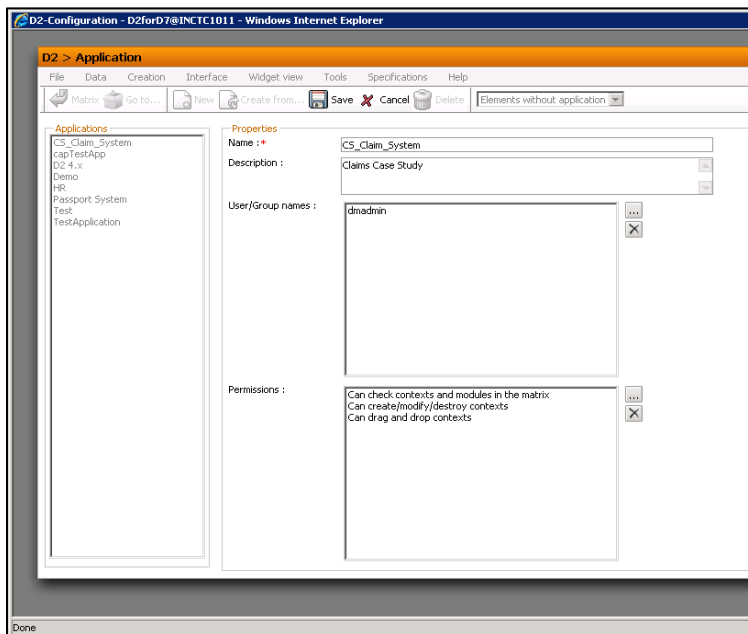
## D2 Config Labs

### Create New Application

1. Go to Tools → Application



2. Enter application name → CS\_Claim\_System

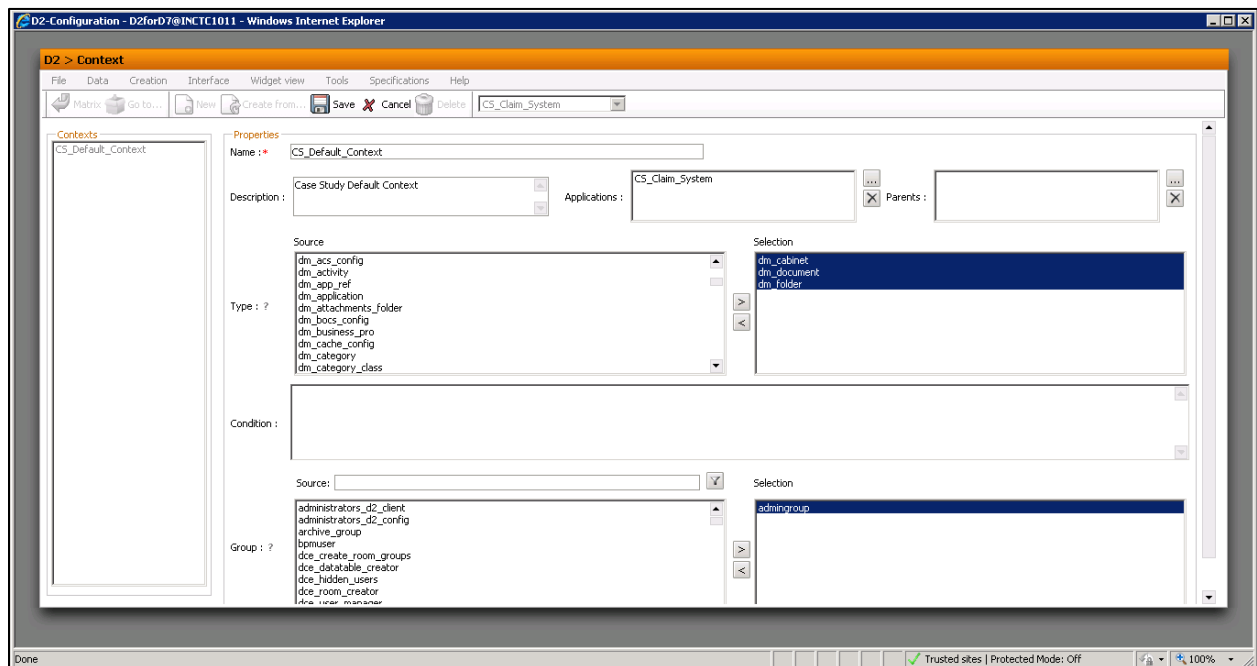
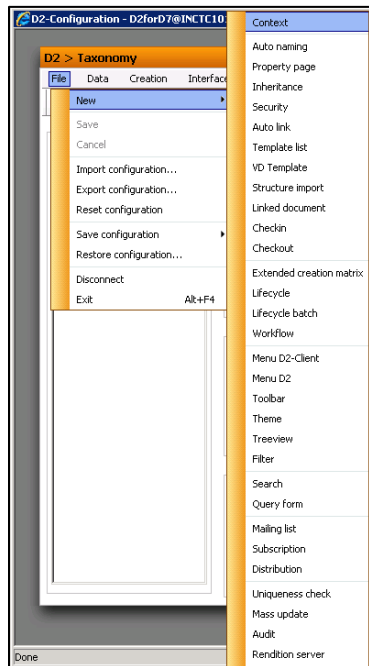


3. Enter Description → Claims Case Study
4. User / Group Names → Select users / groups to which the application is accessible
5. Permissions → Use the list controls to add and remove permissions.

### Create Context

1. Go to File-> New -> Context -> A new Context page creation will open as shown in the below screenshot

## D2 Config Labs



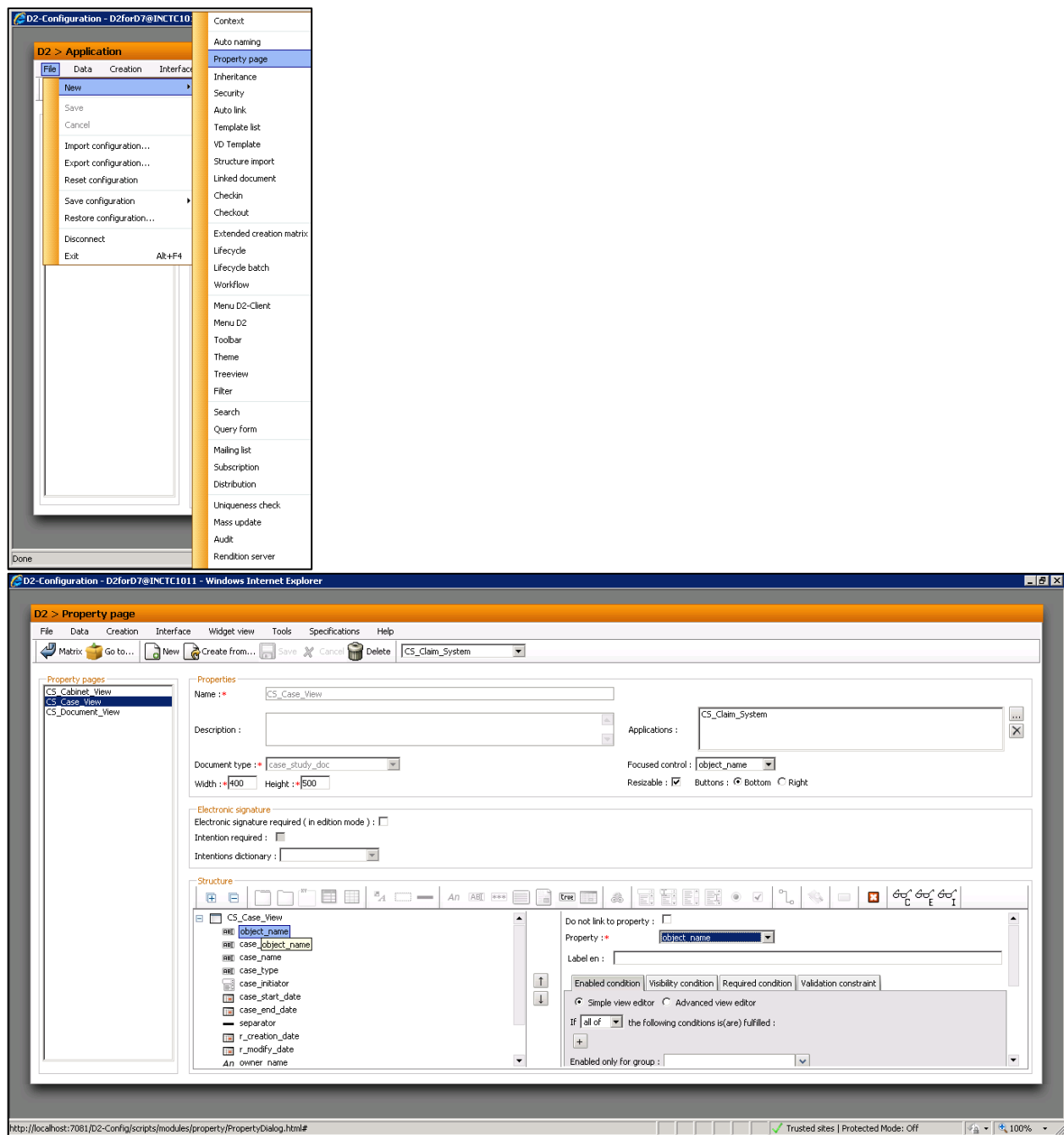
2. Enter the Context name as CS\_Default\_Context
3. Enter the Applications name as CS\_Claim\_System
4. Select the Required Type and Group

## D2 Config Labs

5. Save the Context page.

### Create Property Page

1. Go to File → New → Property Page. A new property page creation will open as shown in the below screenshot



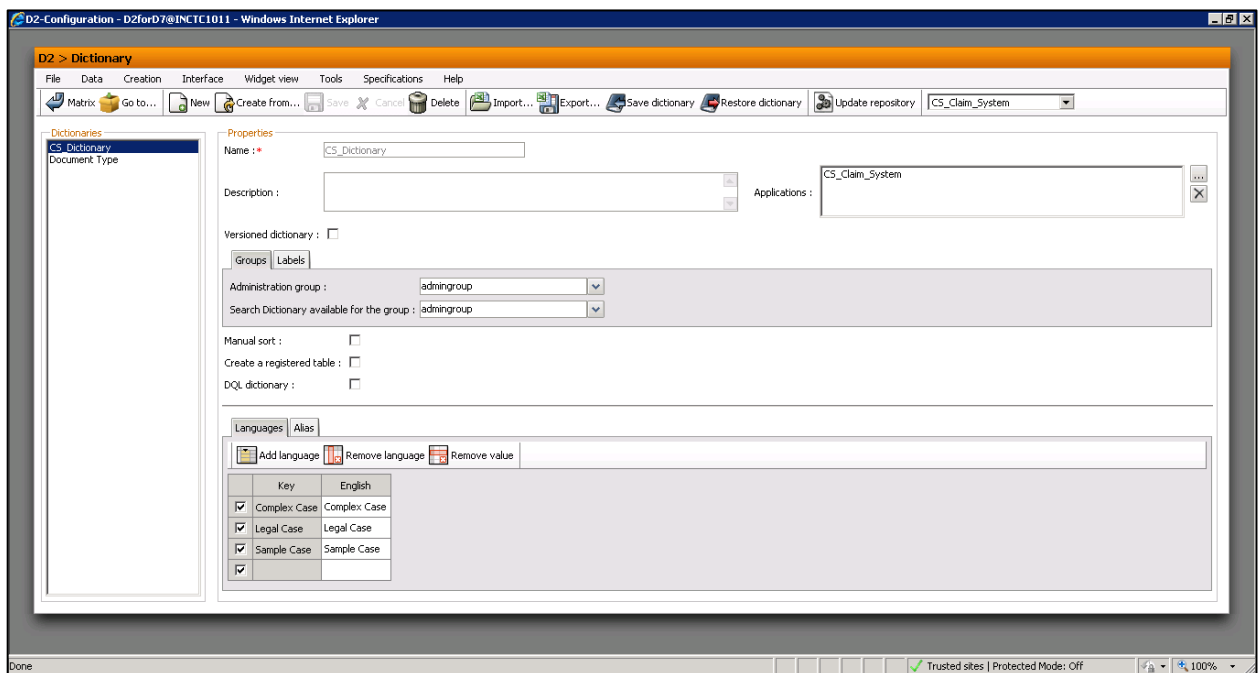
2. Enter the Property Name as CS\_Case\_View

## D2 Config Labs

3. Enter the Application Name as CS\_Claim\_System
4. Select the Document type as case\_study\_doc
5. Select the New property page under Structure window and add the text field icon.
6. Select the Property as object\_name
7. Add test field, label, date fields for remaining attributes
8. Click Save button.

### Create Dictionary

1. Go to Data → Dictionary to create new Dictionary



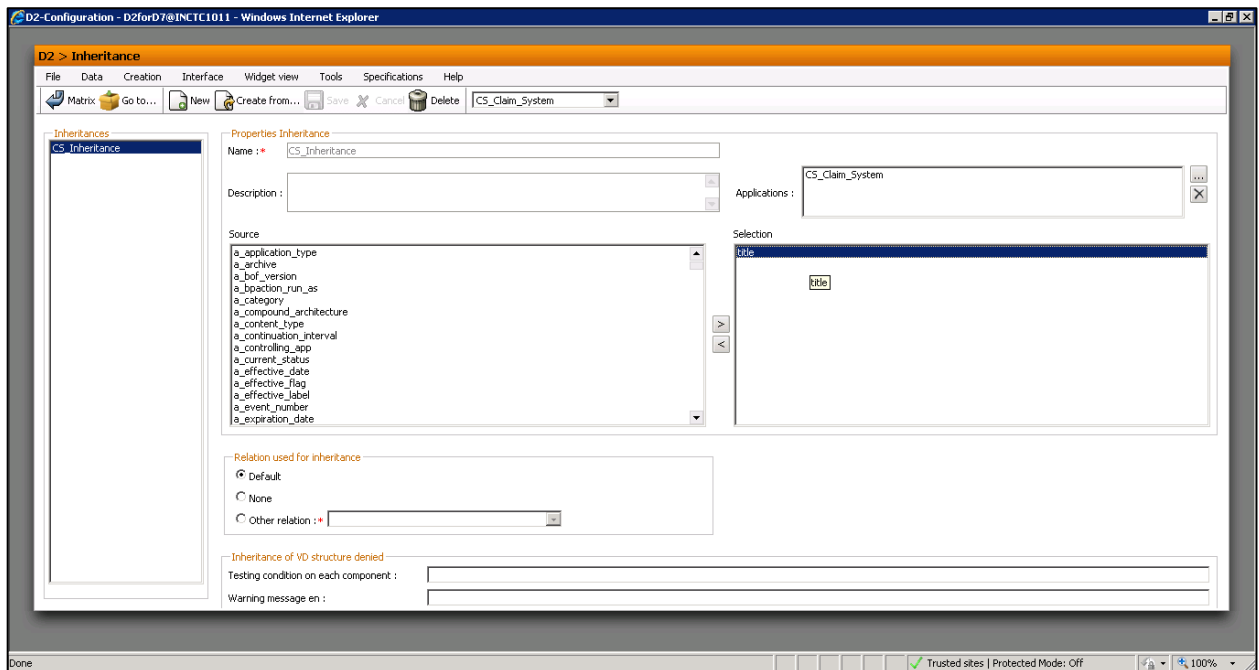
2. Enter Name as CS\_Dictionary
3. Enter the Application Name as CS\_Claim\_System
4. Select admin group as Administration group
5. Select admin group to make search available
6. To make it possible to sort manually the dictionary, check box.
7. To add a new language click Add language. Add → English
8. Add 3 keys and aliases – Complex Case, Simple Case, Legal Case
9. Click Save to use automatic versioning

## D2 Config Labs

10. Click Save Dictionary to use manual versioning
11. Click Update repository to load the changes in the repository without restarting the server

### Create Inheritance

1. Go to File → New → Inheritance. A new Inheritance creation will open as shown in the below screenshot



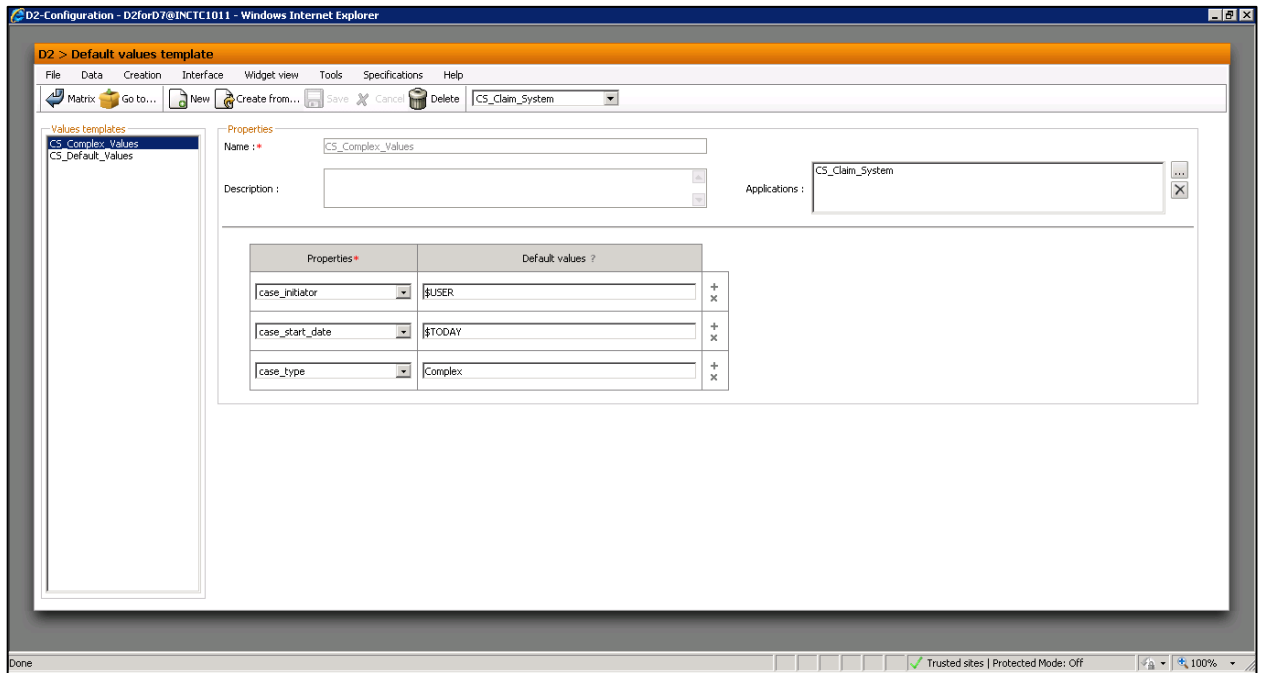
2. Enter Name as CS\_Inheritance
3. Enter the Application Name as CS\_Claim\_System
4. Select the attribute title to inherit
5. Click Save

### Create Default Value templates

1. Go to Creation → Default Value Templates. A new Default Value template creation will open as shown in the below screenshot

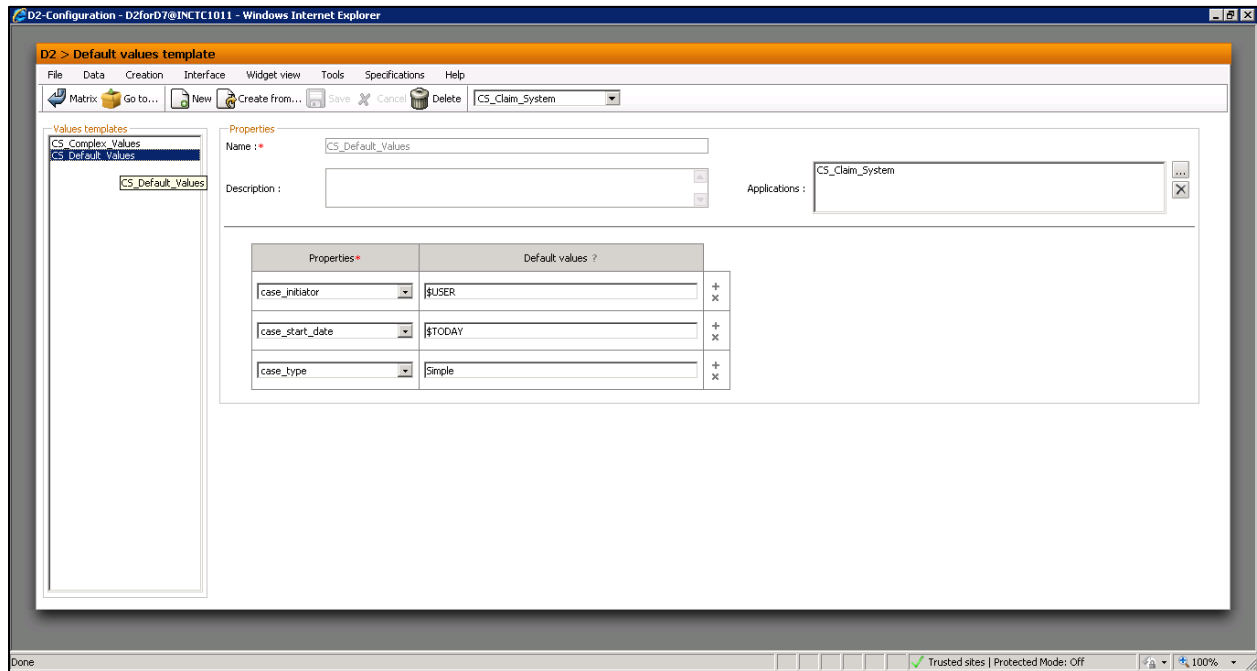


## D2 Config Labs



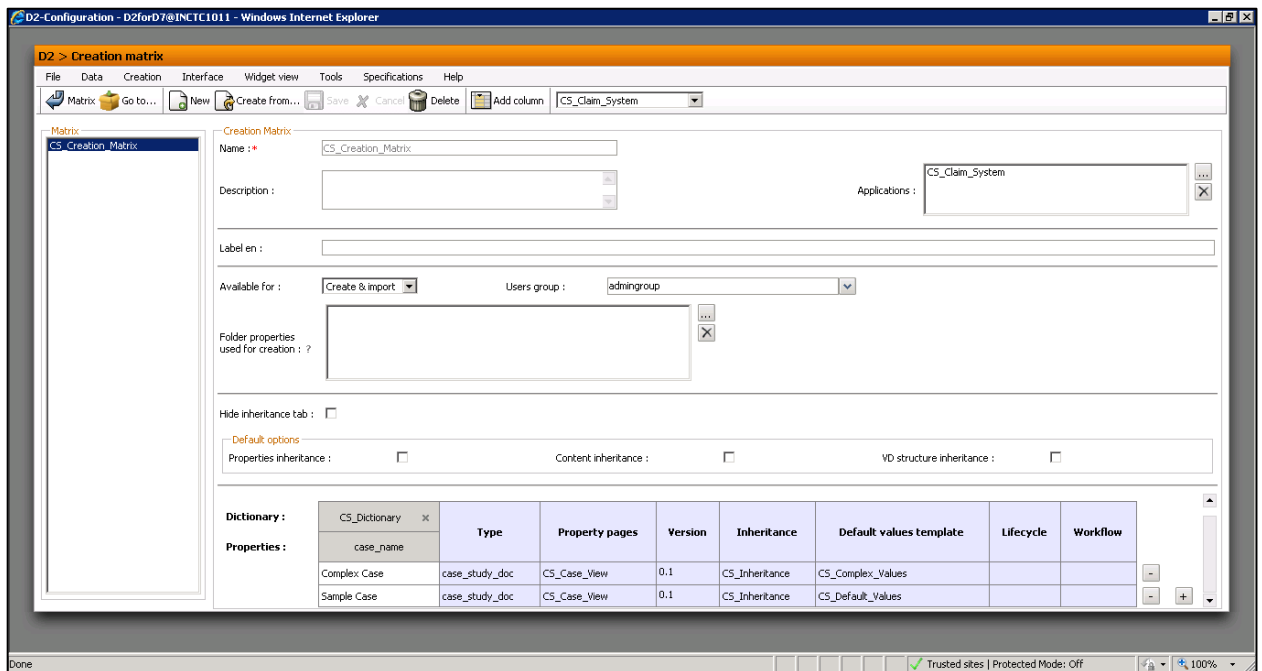
2. Enter the Name as CS\_Complex\_values
3. Enter the Application Name as CS\_Claim\_System
4. Select case\_initiator property, map default value as \$USER (Logged in user)
5. Select case\_start\_date property, map default value as \$TODAY (Today's date)
6. Select case\_type as Complex
7. Click Save
8. Similarly create another default value template for simple cases

## D2 Config Labs



### Create Creation Matrix

1. Go to Creation → Creation Matrix. A new Creation matrix will open as shown in the below screenshot



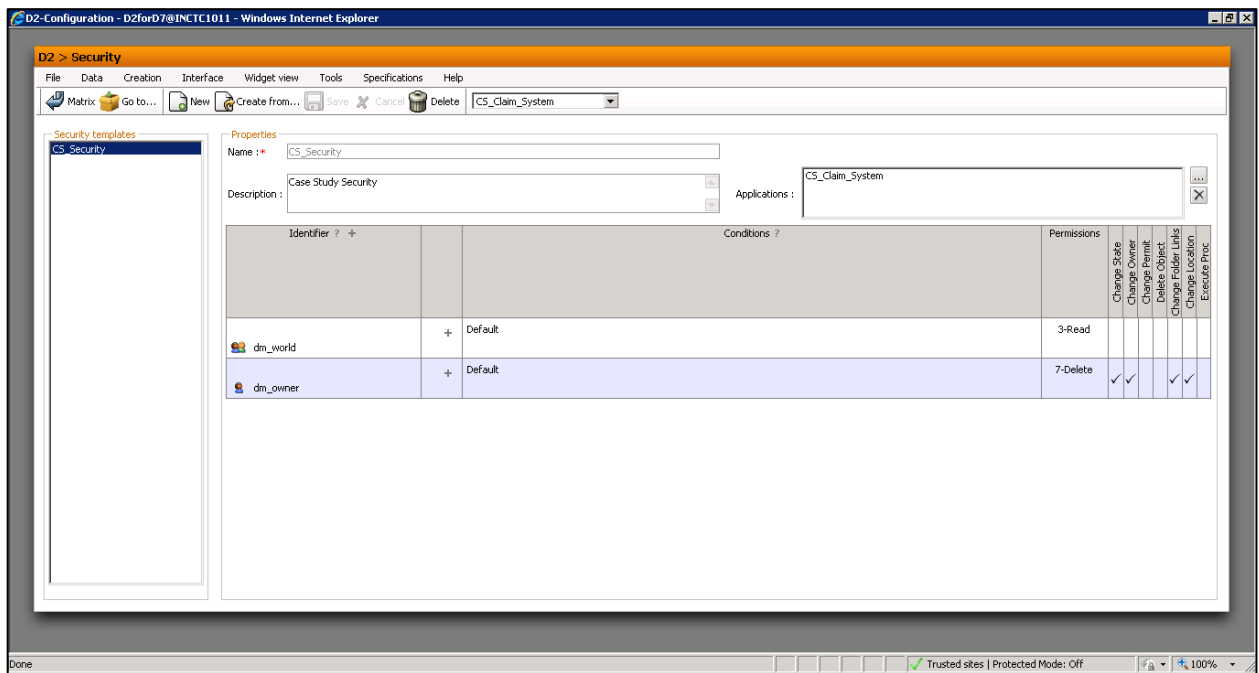
2. Enter the Name as CS\_Creation\_Matrix
3. Enter the Application Name as CS\_Claim\_System

## D2 Config Labs

4. Select available for Create & Import
5. Select user group as admingroup
6. Select Dictionary as CS\_Dictionary. Select properties as case\_name.
7. For each dictionary value, select the type, property pages, version, Inheritance, default value templates.
8. Click Save.

### Create Security

1. Go to File → New → Security. A new Security config will open as shown in the below screenshot

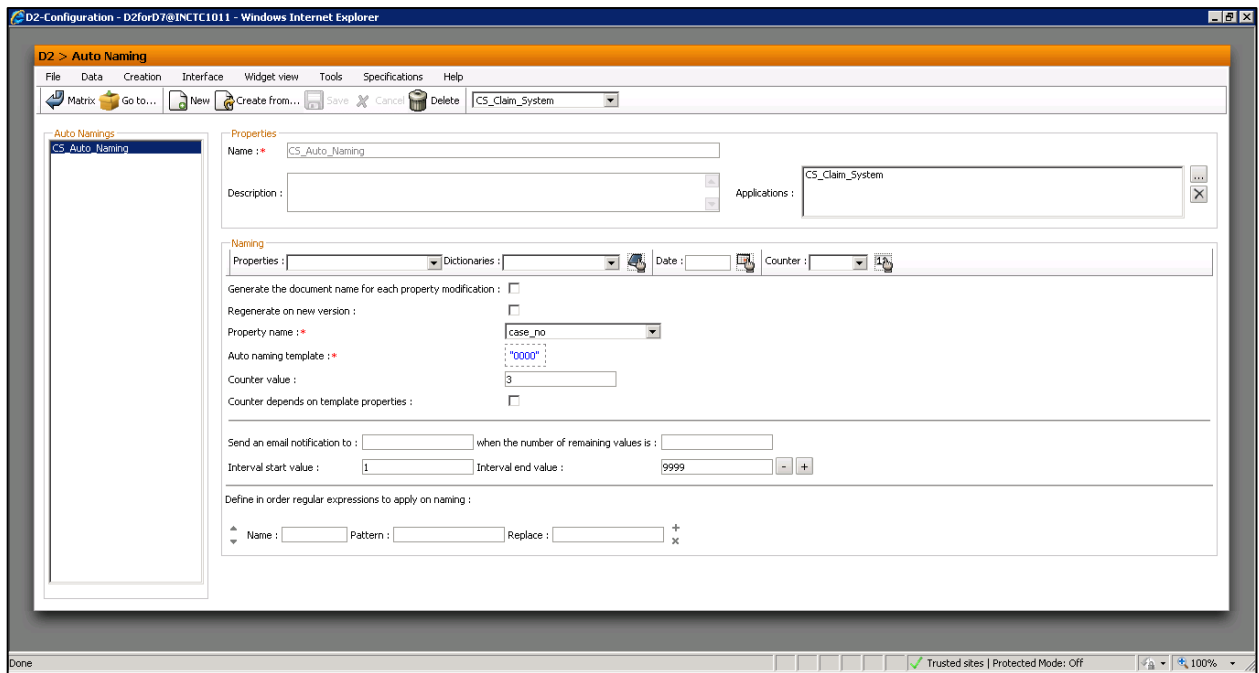


2. Enter the Name as CS\_Security
3. Enter the Application Name as CS\_Claim\_System
4. Select Read permission for dm\_world
5. Select Delete permission for dm\_owner and Change State/Change Owner/Change Folder links/Change Location extended permissions
6. Click Save.

## D2 Config Labs

### Create Auto Naming

1. Go to File → New → Auto Naming. A new Auto Naming config will open as shown in the below screenshot

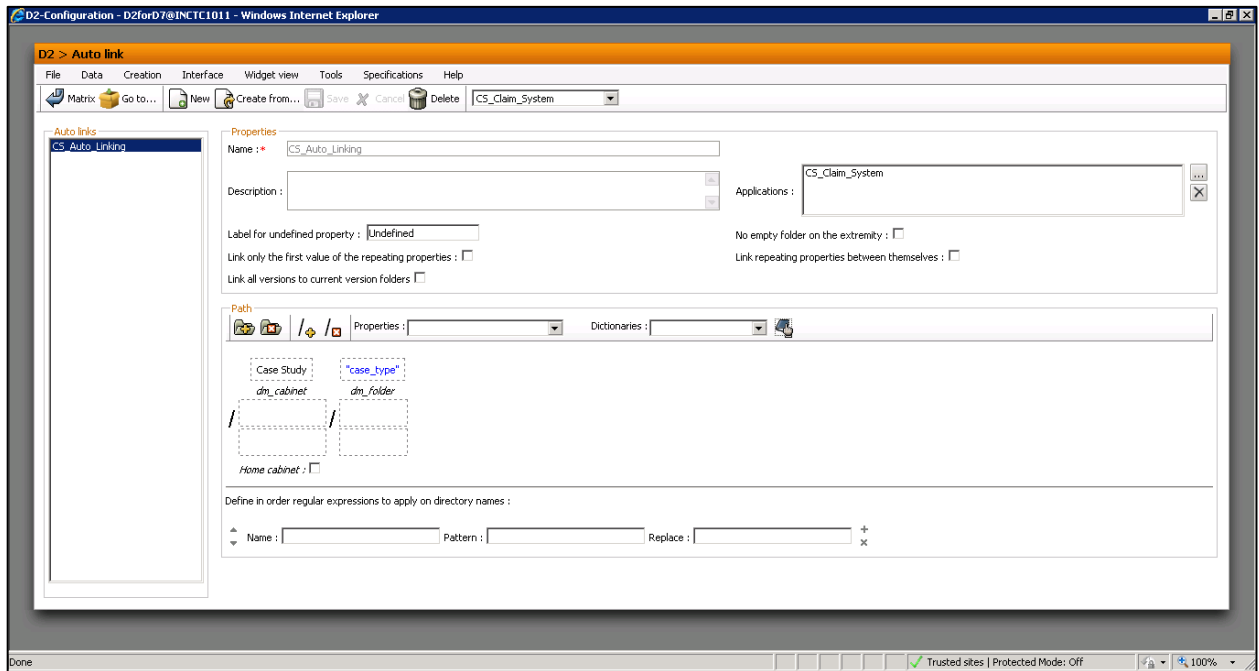


2. Enter the Name as CS\_Auto\_Naming
3. Enter the Application Name as CS\_Claim\_System
4. Select property name as case\_no
5. Set the counter to 4 digits
6. Click on Auto Naming template and add counter
7. Set Interval start value to 1 and end value to 9999
8. Click Save.

### Create Auto Link

1. Go to File → New → Auto Link. A new Auto Link config will open as shown in the below screenshot

## D2 Config Labs

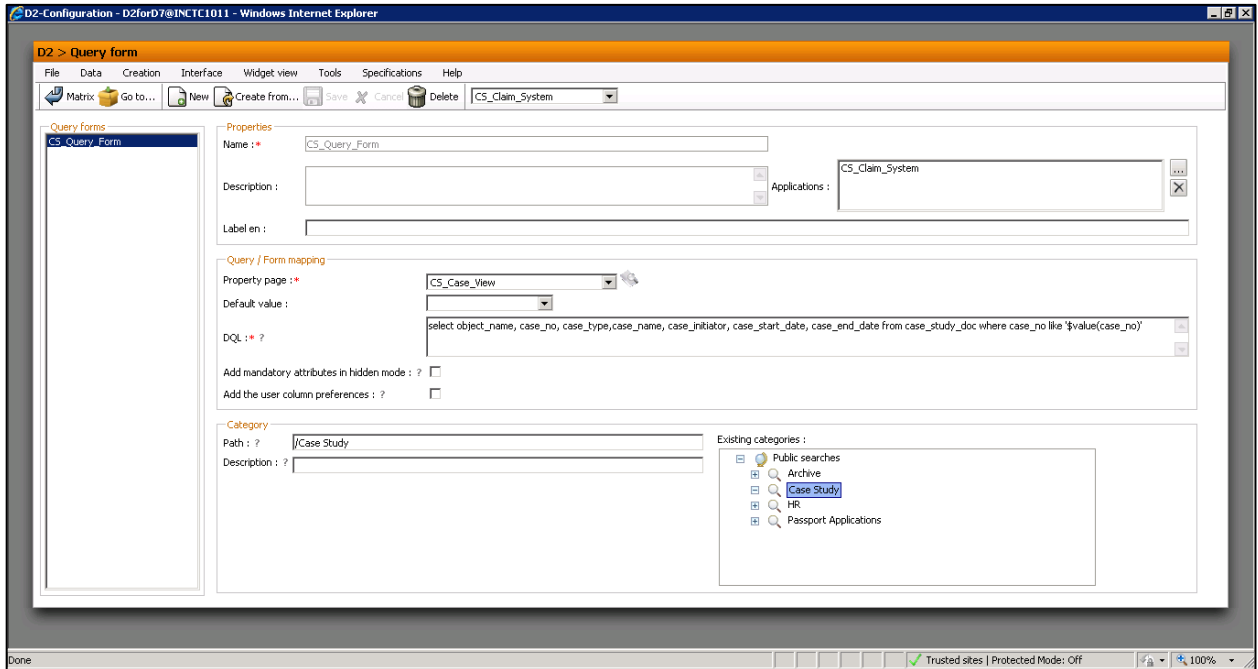


2. Enter the Name as CS\_Auto\_Linking
3. Enter the Application Name as CS\_Claim\_System
4. Set label for undefined property as Undefined
5. Enter Case Study in dm\_cabinet
6. Select property as case\_type, click on dm\_folder, insert property value
7. Click Save.

### Create Search Form

1. Go to File → New → Search Form. A new Search Form config will open as shown in the below screenshot

## D2 Config Labs

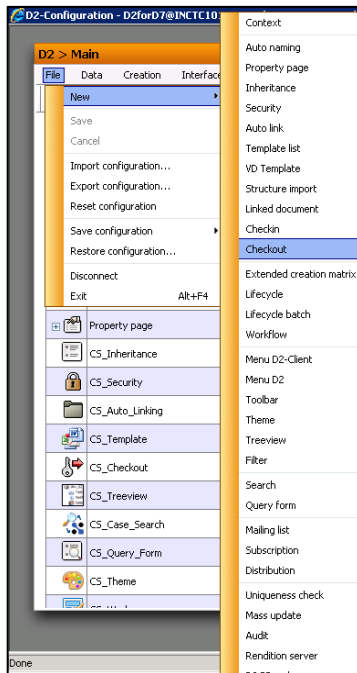


2. Enter the Name as CS\_Query\_Form
3. Enter the Application Name as CS\_Claim\_System
4. Select property page as CS\_Case\_View
5. Enter DQL to search based on case\_no – select object\_name, case\_no, case\_type, case\_name, case\_initiator, case\_start\_date, case\_end\_date from case\_study\_doc where case\_no where case\_no like '\$value(case\_no)'
6. Enter Path as Case Study to create a new category
7. Click Save.

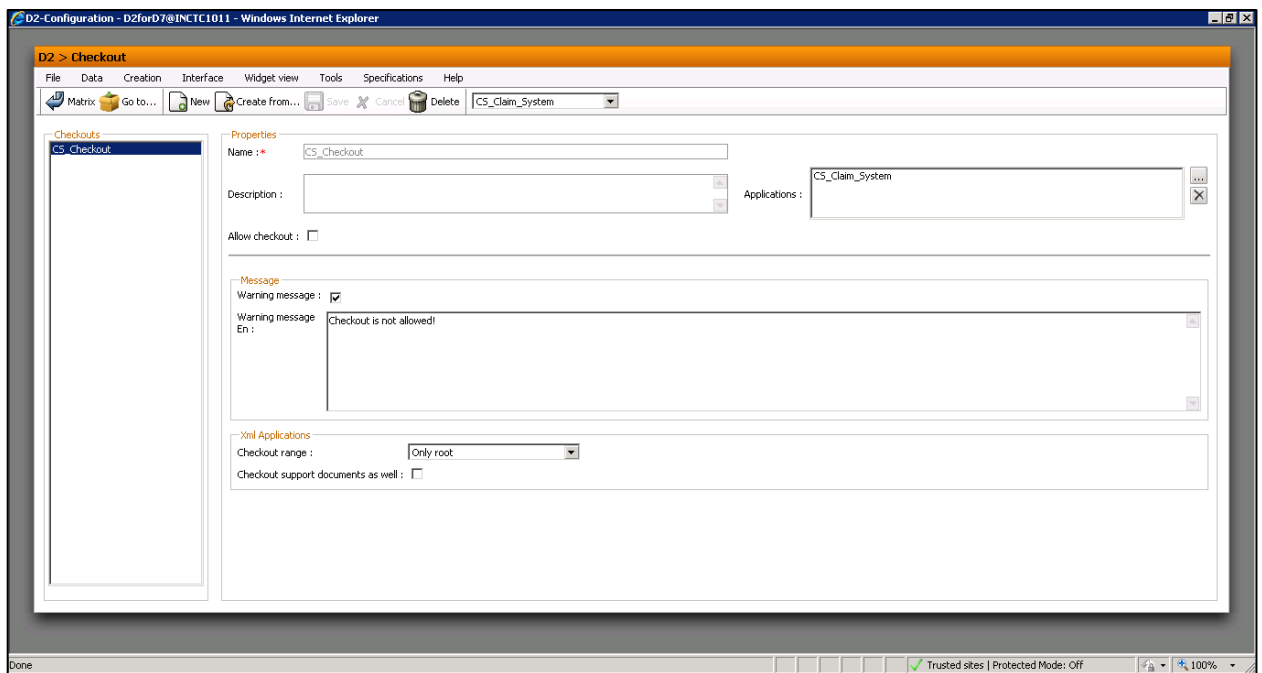
### Create CheckOut

1. Go to File → New → Checkout. A new Checkout config will open as shown in the below screenshot

## D2 Config Labs



2. Enter the Name as CS\_Checkout
3. Enter the Application Name as CS\_Claim\_System



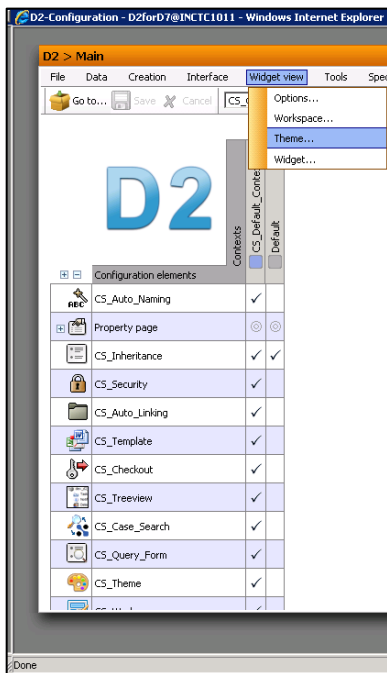
4. Uncheck Allow Checkout
5. Check Warning Message

## D2 Config Labs

6. Enter warning message as Checkout is not allowed!
7. Select checkout range as Only root
8. Click Save.

### Create Theme

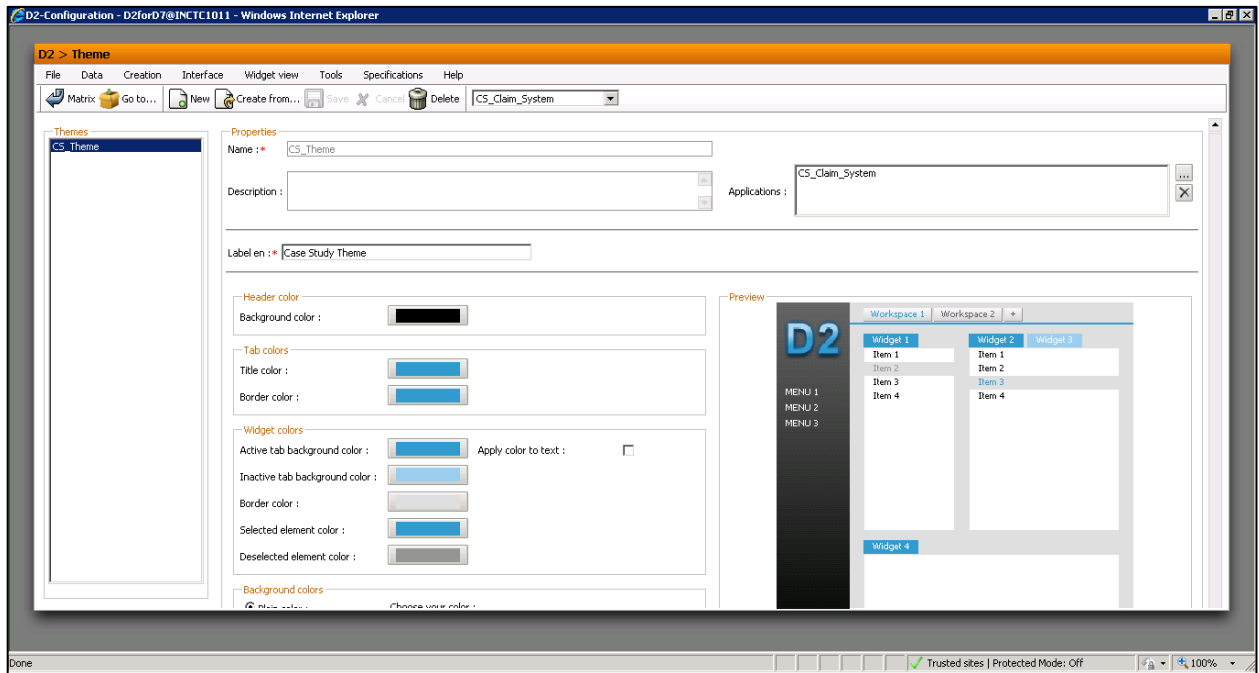
1. Go to Widget View → Theme



2. Click New



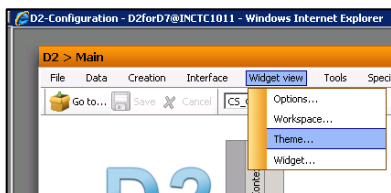
## D2 Config Labs



3. Enter the Name as CS\_Theme
4. Enter the Application Name as CS\_Claim\_System
5. Select the colors for various elements
6. Click Save.

### Create Widgets

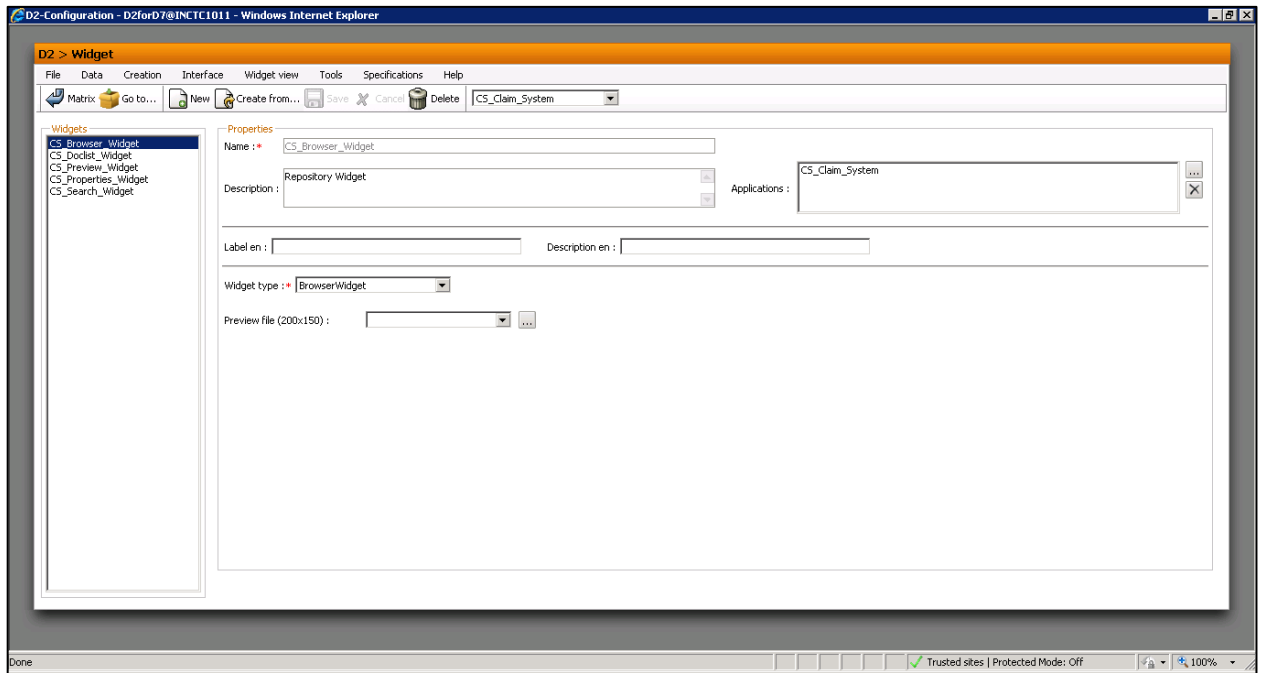
1. Go to Widget View → Widgets



### Create Browser Widget

2. Click New

## D2 Config Labs

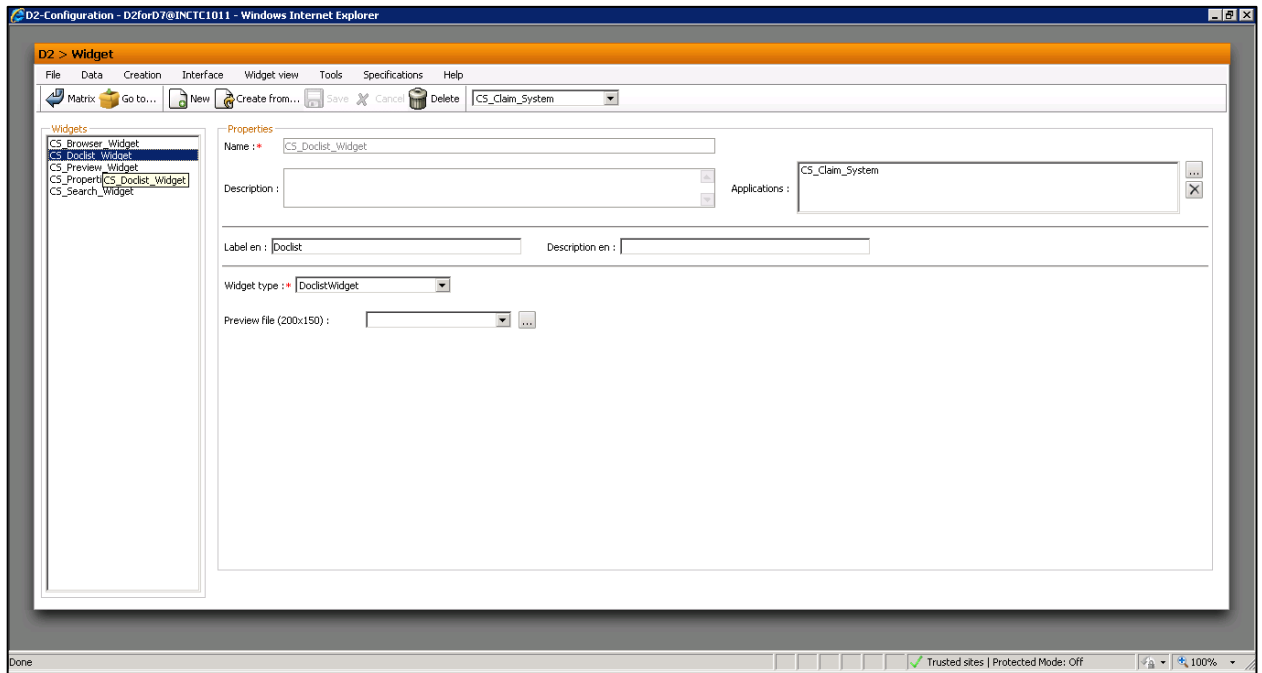


3. Enter the Name as CS\_Browser\_Widget
4. Enter the Application Name as CS\_Claim\_System
5. Select Widget type as BrowserWidget
6. Click Save

### **Create Doclist Widget**

7. Click New

## D2 Config Labs

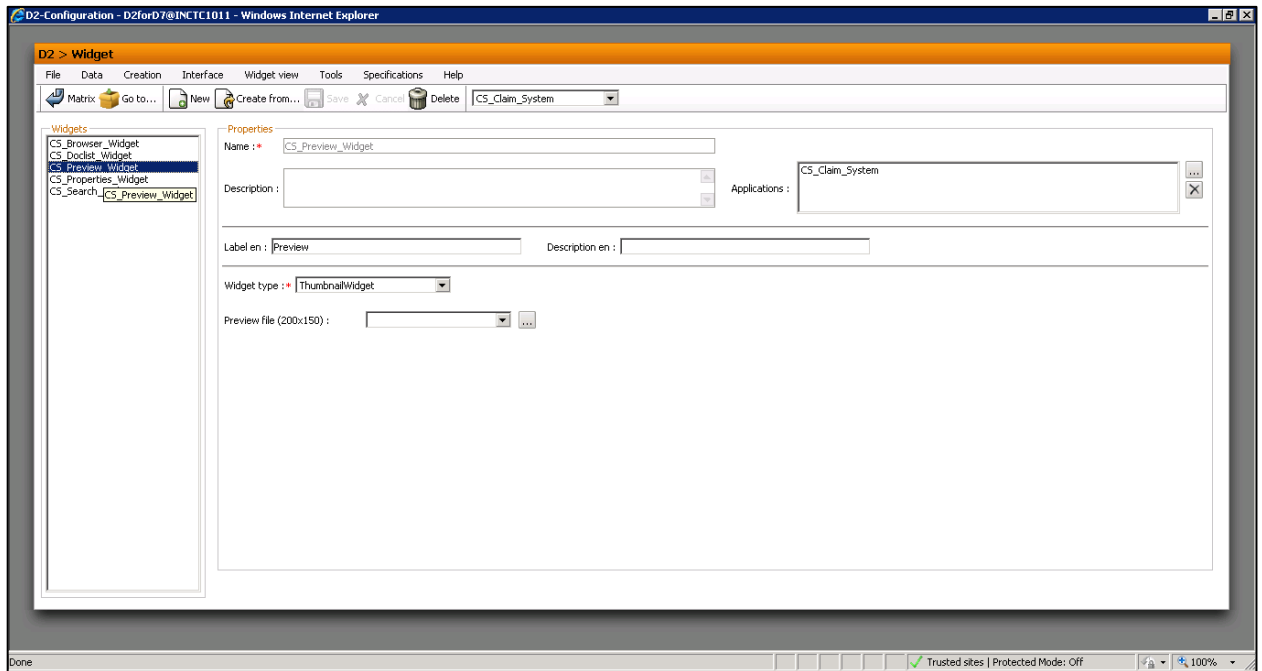


8. Enter the Name as CS\_Doclist \_Widget
9. Enter the Application Name as CS\_Claim\_System
10. Select Widget type as DoclistWidget
11. Click Save

### **Create Preview Widget**

12. Click New

## D2 Config Labs

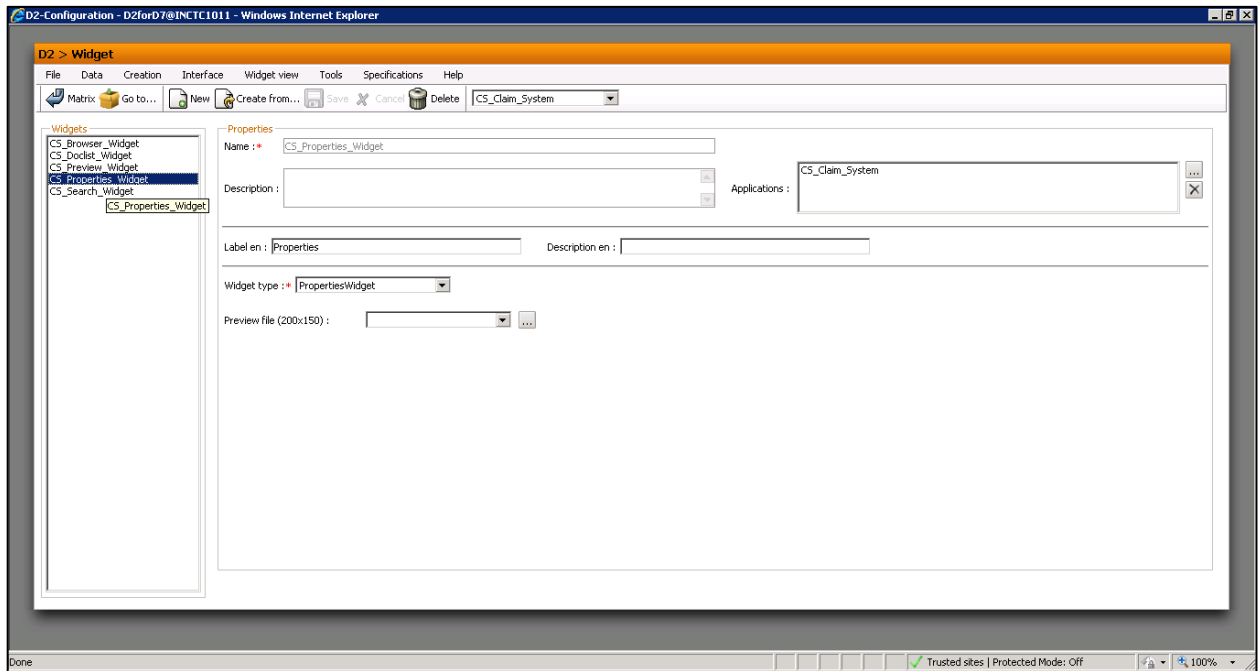


13. Enter the Name as CS\_Preview \_Widget
14. Enter the Application Name as CS\_Claim\_System
15. Select Widget type as ThumbnailWidget
16. Click Save

### **Create Properties Widget**

17. Click New

## D2 Config Labs

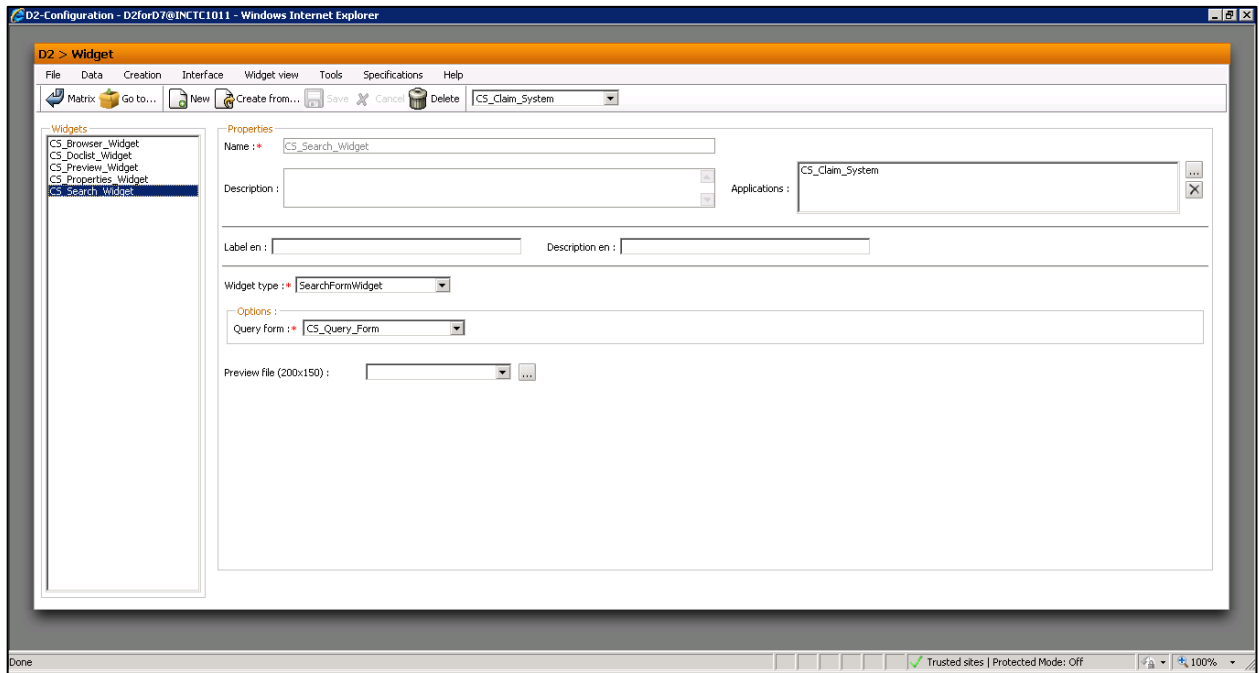


18. Enter the Name as CS\_Preview \_Widget
19. Enter the Application Name as CS\_Claim\_System
20. Select Widget type as PropertiesWidget
21. Click Save

### Create Search Widget

22. Click New

## D2 Config Labs

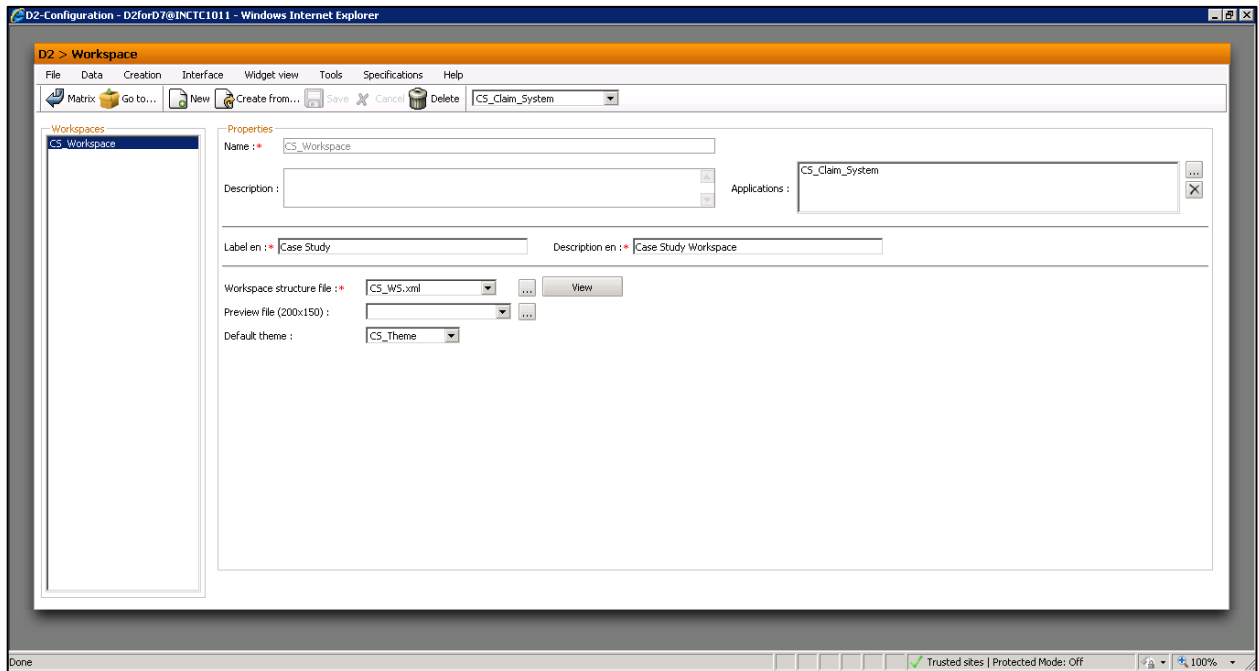


23. Enter the Name as CS\_Search\_Widget
24. Enter the Application Name as CS\_Claim\_System
25. Select Widget type as SearchFormWidget
26. Select Query form as CS\_Query\_Form
27. Click Save.

### Create Workspace

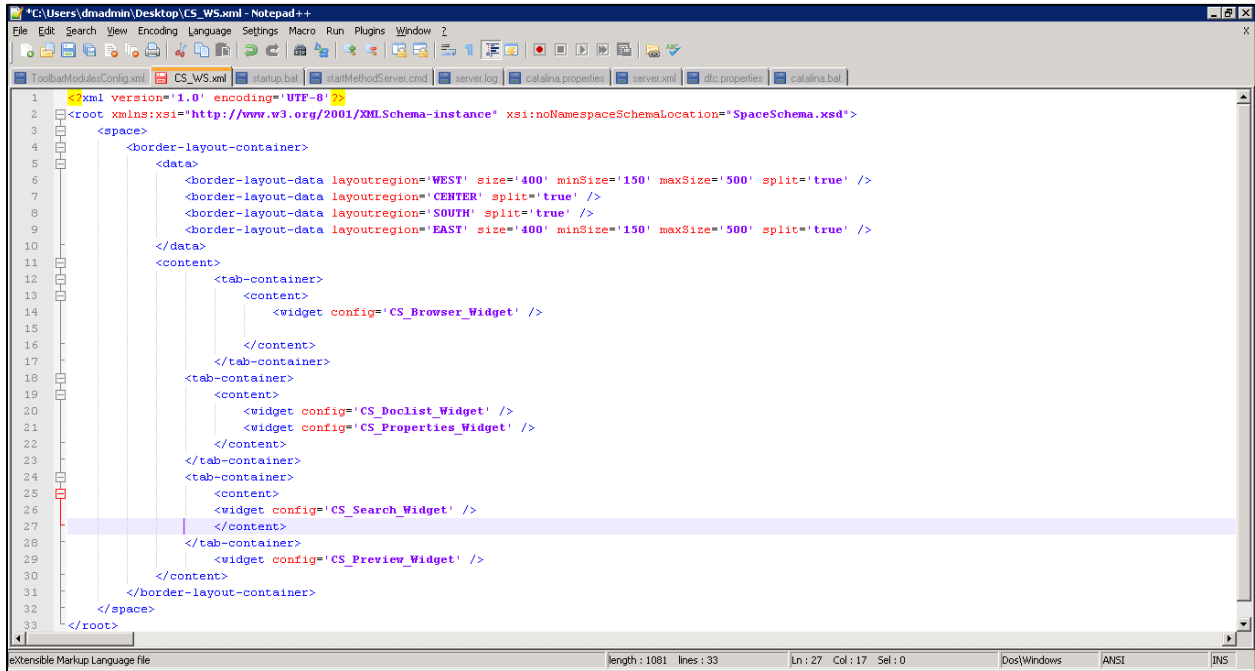
1. Go to Widget View → Workspace. Click New.

## D2 Config Labs



2. Enter the Name as CS\_Workspace
3. Enter the Application Name as CS\_Claim\_System
4. Enter Label as Case Study and Description as Case Study Workspace
5. Import new workspace structure file
6. Select theme as CS\_Theme
7. CS\_WS.xml file

## D2 Config Labs



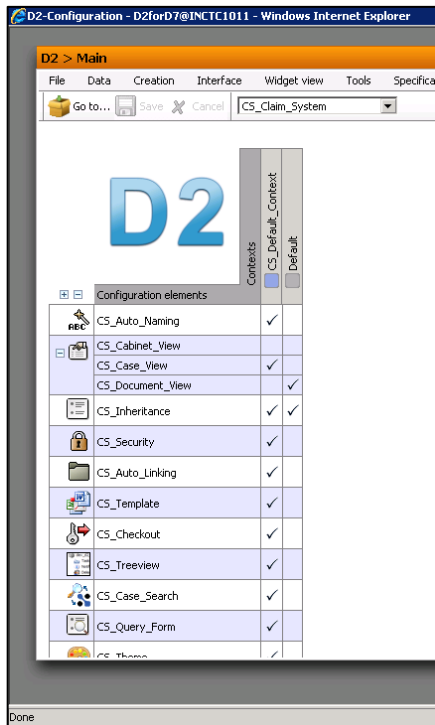
```
1 <?xml version='1.0' encoding='UTF-8' ?>
2 <root xmlns:xsi='http://www.w3.org/2001/XMLSchema-instance' xsi:noNamespaceSchemaLocation='SpaceSchema.xsd'>
3   <space>
4     <border-layout-container>
5       <data>
6         <border-layout-data layoutregion='WEST' size='400' minSize='150' maxSize='500' split='true' />
7         <border-layout-data layoutregion='CENTER' split='true' />
8         <border-layout-data layoutregion='SOUTH' split='true' />
9         <border-layout-data layoutregion='EAST' size='400' minSize='150' maxSize='500' split='true' />
10      </data>
11      <content>
12        <tab-container>
13          <content>
14            <widget config='CS_Browser_Widget' />
15          </content>
16        </tab-container>
17        <tab-container>
18          <content>
19            <widget config='CS_Declist_Widget' />
20            <widget config='CS_Properties_Widget' />
21          </content>
22        </tab-container>
23        <tab-container>
24          <content>
25            <widget config='CS_Search_Widget' />
26          </content>
27        </tab-container>
28        <widget config='CS_Preview_Widget' />
29      </content>
30    </border-layout-container>
31  </space>
32 </root>
```

### Configure Matrix

1. Go to Matrix.
2. Expand all the configuration elements.
3. Check the configurations as shown in the screenshots below.



## D2 Config Labs



4. Click Save

## D2 Config Labs

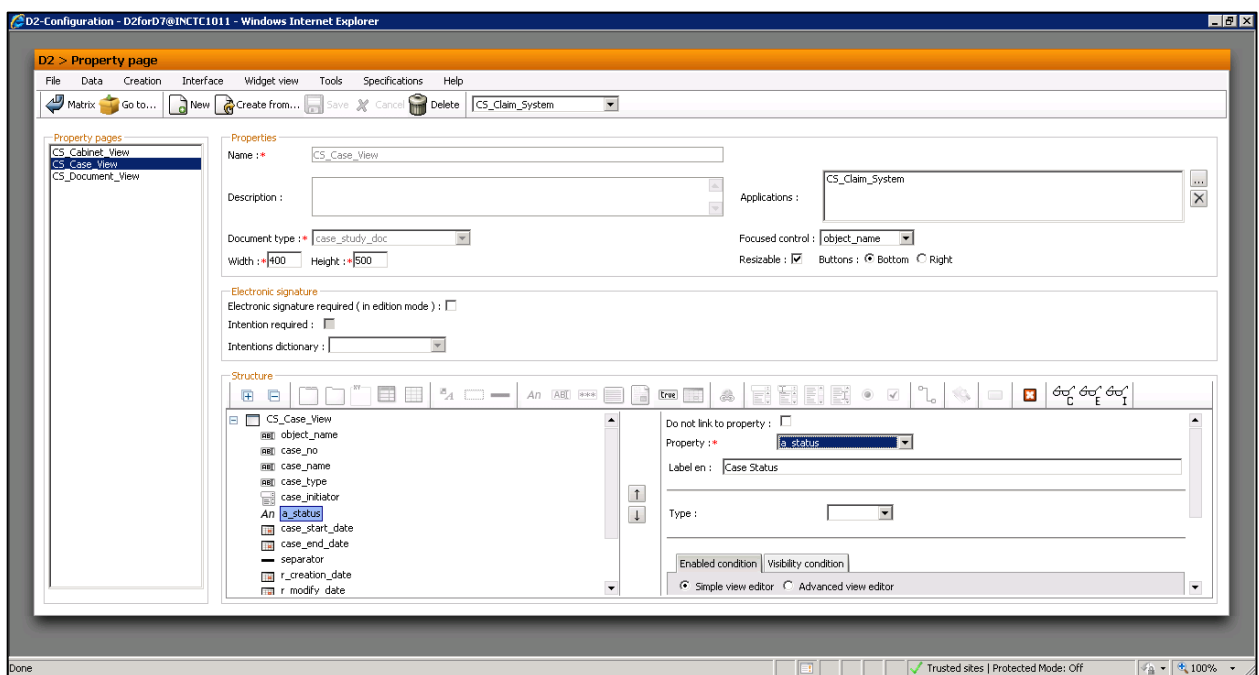
### Create Lifecycle

#### Requirements

1. Create a 3 state lifecycle with states namely: Draft, In Progress, Closed.
2. The lifecycle should be applied to document on creation and the initial state should be Draft state.
3. You should be able to promote the lifecycle from Draft to In Progress and In Progress to Closed state.
4. On entering Closed state, the case end date should be set to today's date.
5. The lifecycle states should be visible in the case study document's property page

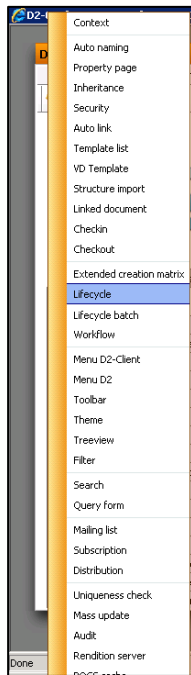
#### Steps

1. Go to Property Page → CS\_Case\_View
2. Add a\_status attribute as a label. Enter its label as Case Status

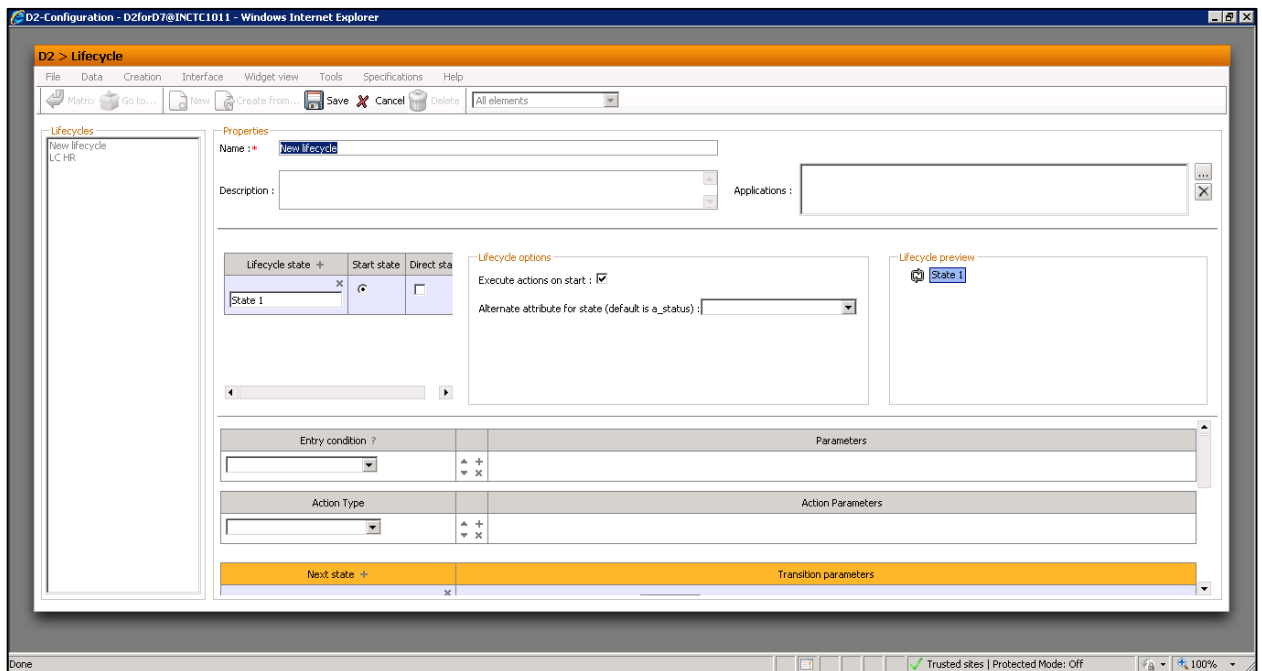


3. Click Save
4. Go to Lifecycle

## D2 Config Labs



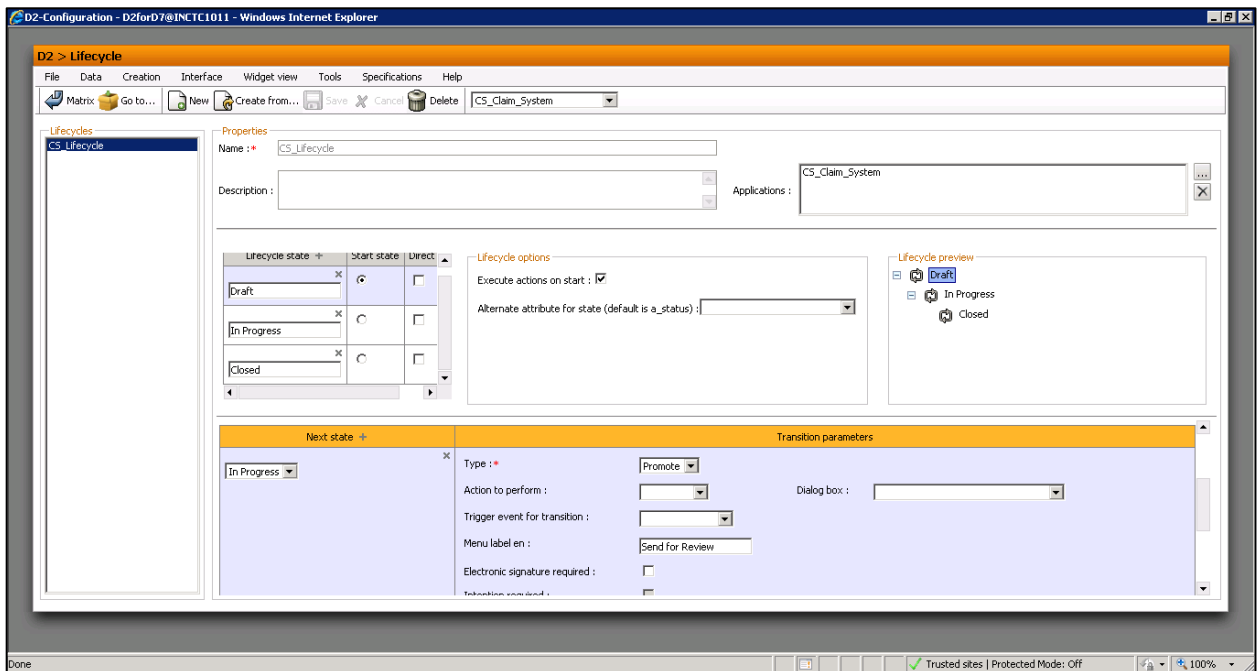
5. Click New. New Lifecycle pages will open as below:



6. Enter the name as CS\_Lifecycle
7. Enter the application as CS\_Claim\_System
8. Click on + Lifecycle state

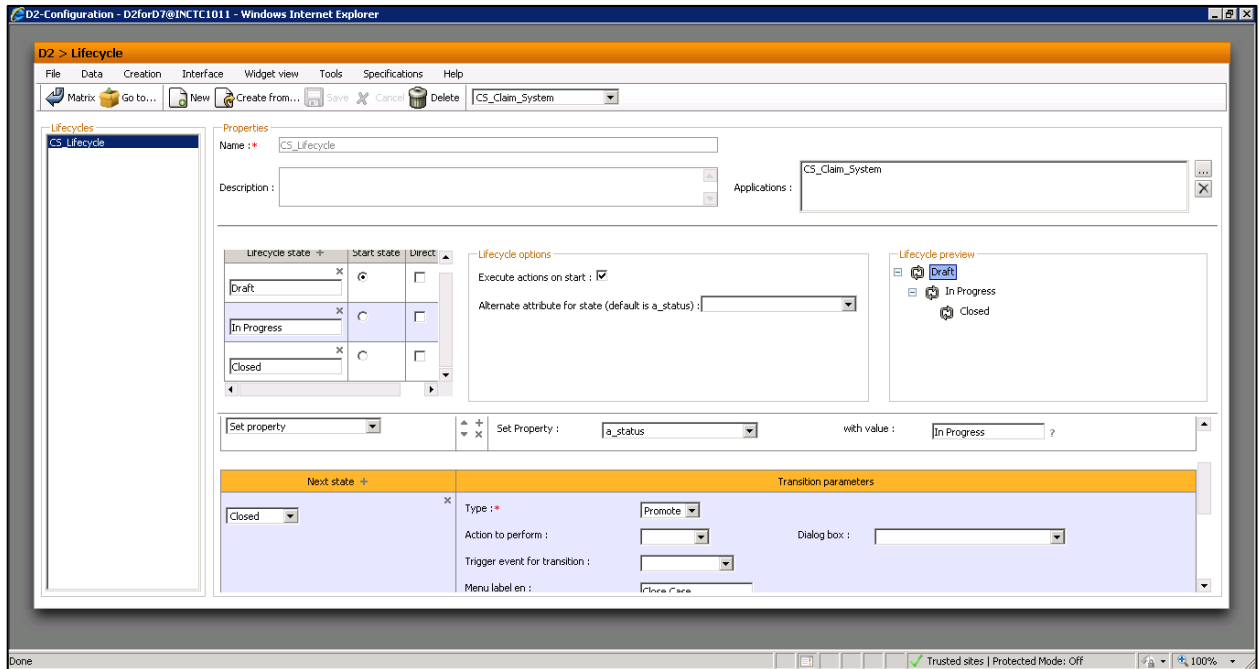
## D2 Config Labs

9. Enter the state name as Draft
10. Check Start State
11. Click on Next State +
12. Select In Progress
13. Select Type Promote
14. Enter menu label as Send for Review
15. Enter confirmation message as Send for Review?



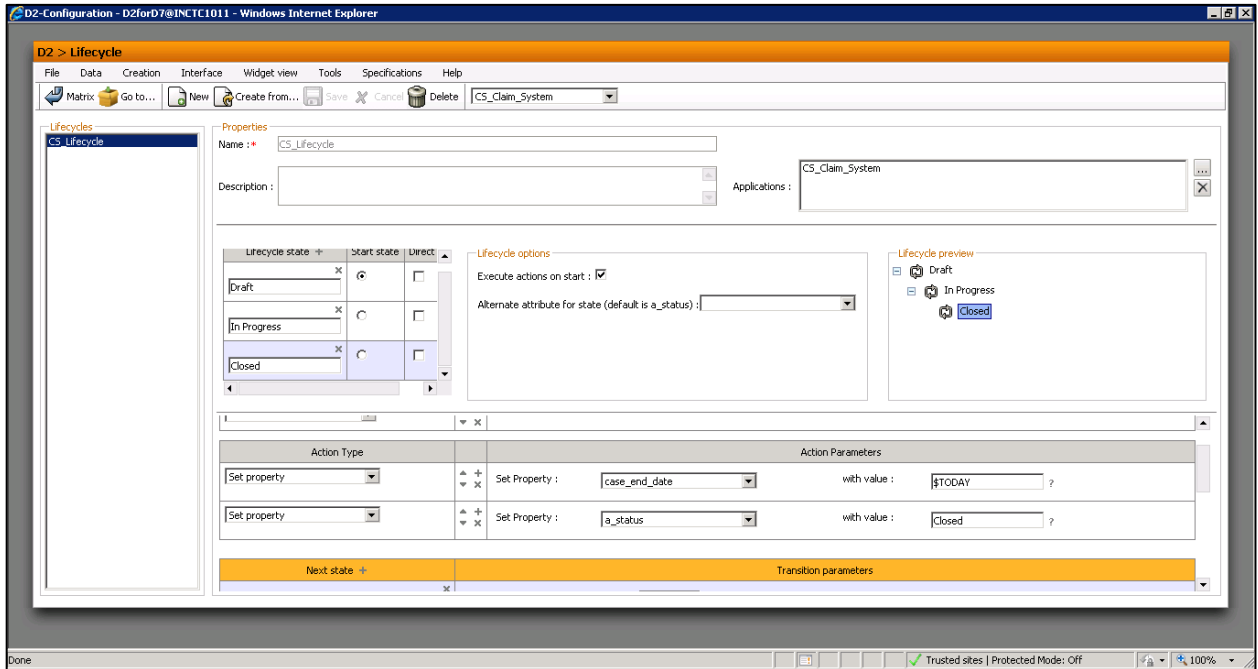
16. Click on + Lifecycle state
17. Enter the state name as In Progress
18. Click on Next State +
19. Select Closed
20. Select Type Promote
21. Select Action Type as Set Property
22. Select Property as a\_status
23. Enter with value as In Progress
24. Enter menu label as Close Case
25. Enter confirmation message as Are you sure you want to close this case?

## D2 Config Labs



26. Click on + Lifecycle state
27. Enter the state name as Closed
28. Select Action Type as Set Property
29. Select Property as a\_status
30. Enter with value as Closed
31. Click on Action Type +
32. Select Action Type as Set Property
33. Select Property as case\_end\_date
34. Enter with value as \$TODAY

## D2 Config Labs



**D2 > Lifecycle**

File Data Creation Interface Widget view Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete CS\_Claim\_System

**Lifecycles**

CS\_Lifecycle

**Properties**

Name : CS\_Lifecycle

Description :

Applications : CS\_Claim\_System

**Lifecycle state**

Start state	Direct
Draft	<input type="checkbox"/>
In Progress	<input type="checkbox"/>
Closed	<input type="checkbox"/>

**Lifecycle options**

Execute actions on start : ☒

Alternate attribute for state (default is a\_status) :

**Lifecycle preview**

Draft

In Progress

Closed

**Action Type**

Action Type	Action Parameters
Set property	Set Property : case_end_date with value : \$TODAY ?
Set property	Set Property : a_status with value : Closed ?

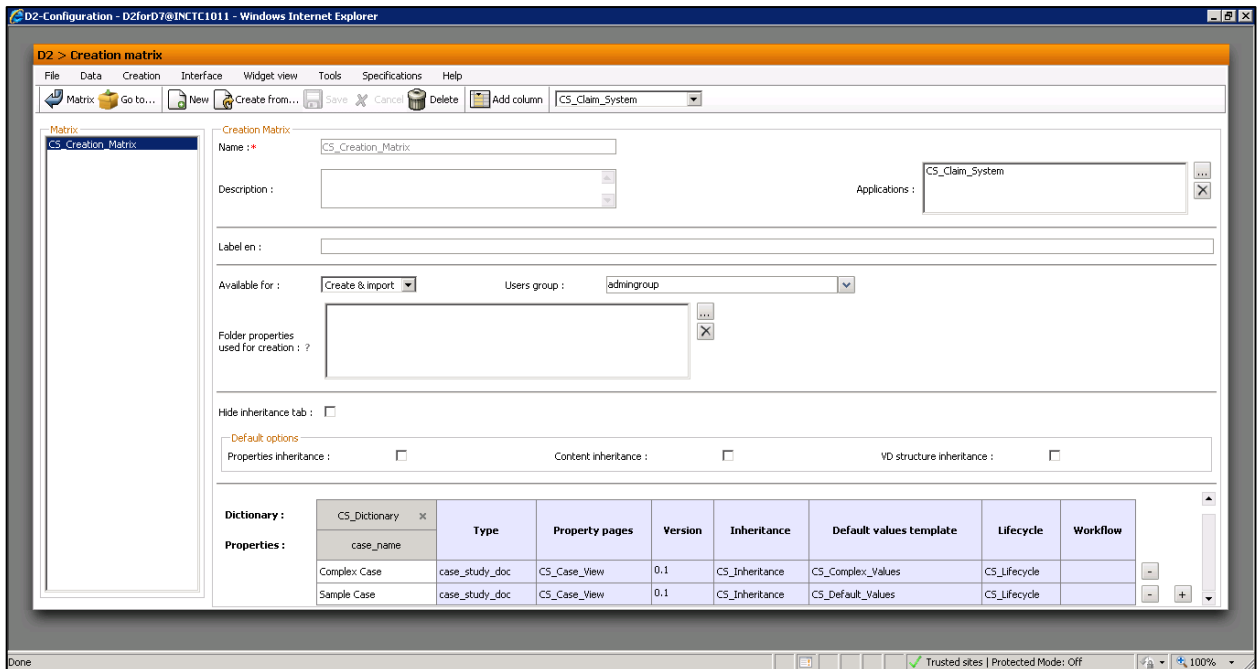
**Next state**

**Transition parameters**

35. Click Save

36. Go to Creation → Creation Matrix. Click on CS\_Creation\_Matrix

37. Select Lifecycle as CS\_Lifecycle for both case types



**D2 > Creation matrix**

File Data Creation Interface Widget view Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete Add column CS\_Claim\_System

**Matrix**

CS\_Creation\_Matrix

**Creation Matrix**

Name : CS\_Creation\_Matrix

Description :

Applications : CS\_Claim\_System

Label en :

Available for : Create & Import Users group : admingroup

Folder properties used for creation : ?

Hide inheritance tab : ☐

**Default options**

Properties inheritance : ☐ Content inheritance : ☐ VD structure inheritance : ☐

**Dictionary**

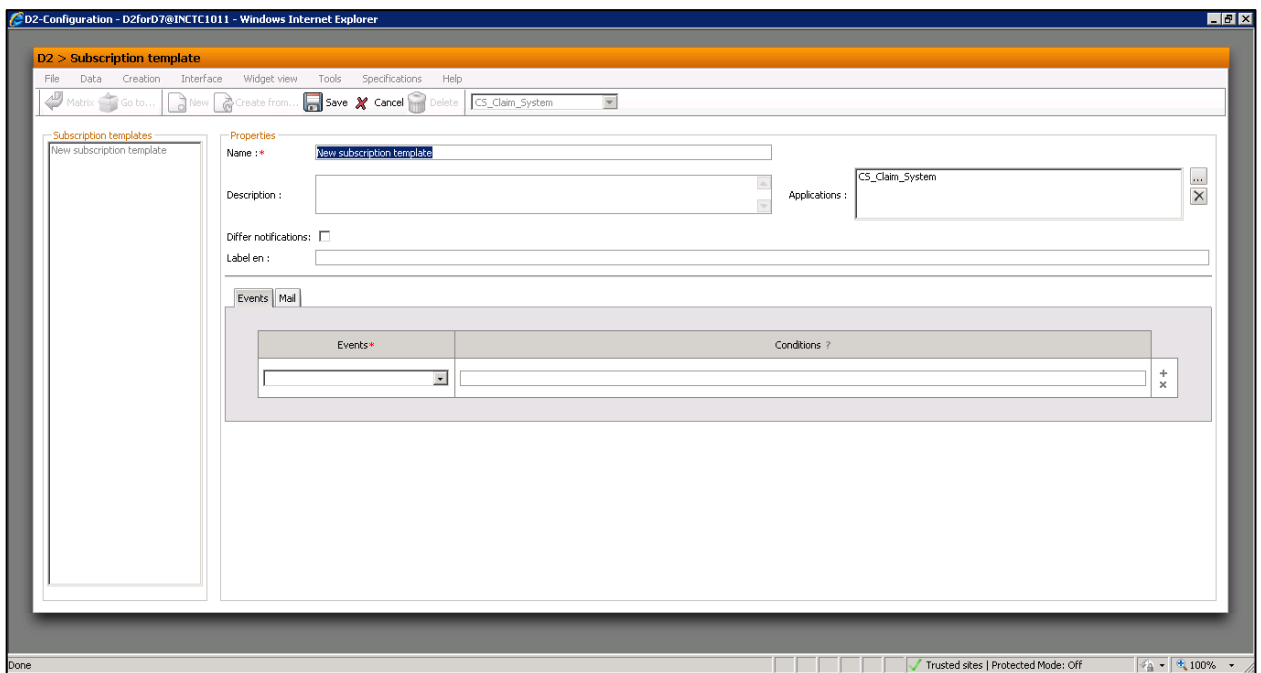
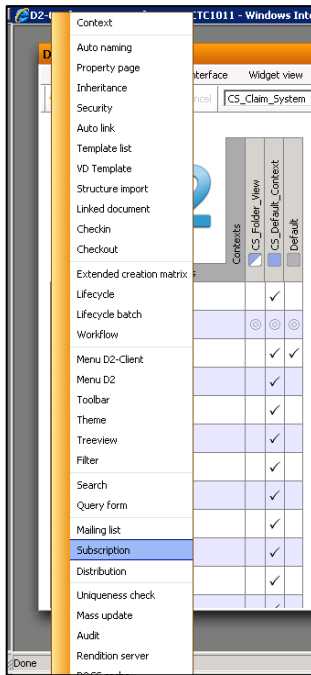
CS_Dictionary	Type	Property pages	Version	Inheritance	Default values template	Lifecycle	Workflow
case_name							
Complex Case	case_study_doc	CS_Case_View	0.1	CS_Inheritance	CS_Complex_Values	CS_Lifecycle	
Sample Case	case_study_doc	CS_Case_View	0.1	CS_Inheritance	CS_Default_Values	CS_Lifecycle	

38. Click Save

## D2 Config Labs

### Create Subscription

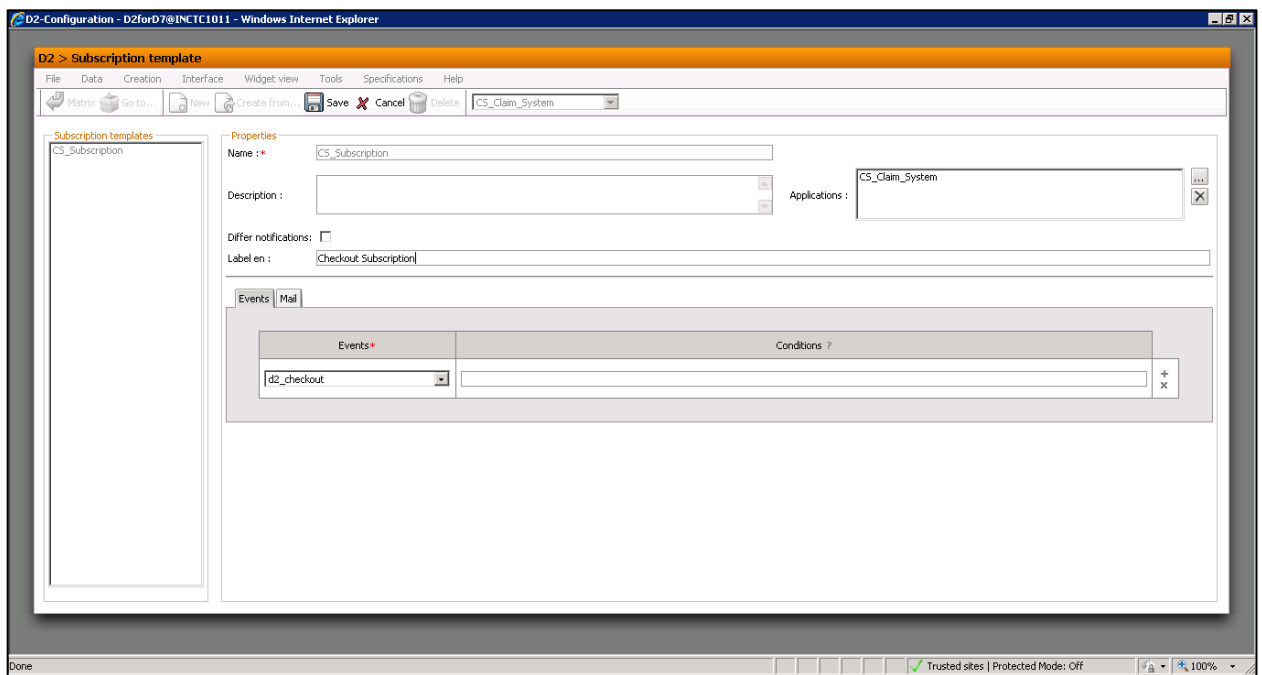
1. Go to File-> New -> Subscription -> A new subscription page creation will open as shown in the below screenshot



2. Enter the "Name" as CS\_Subscription

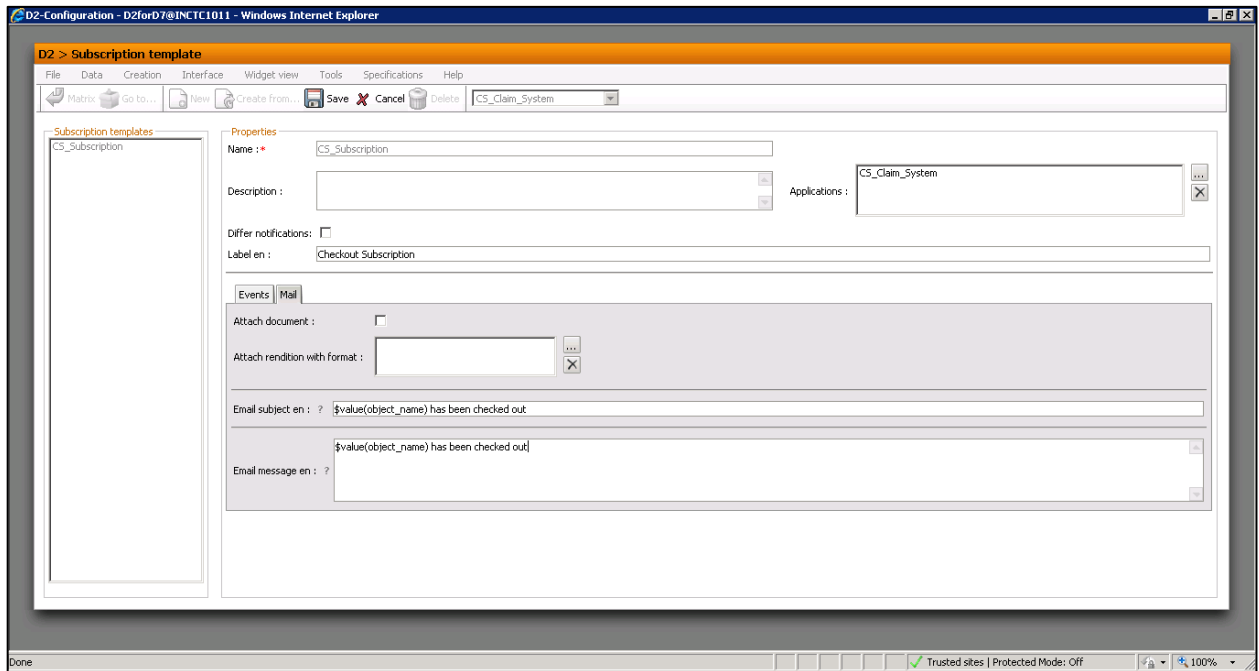
## D2 Config Labs

3. Enter the “Applications” CS\_Claim\_System
4. Select the required event from the “Events” drop-down as d2\_checkout
5. Click on “Mail” tab.
6. Check the “Attach document” box to attach the document in the mail sent
7. Enter the Email subject : “\$value(object\_name) has been checked out”.
8. Enter the message field “\$value(object\_name) has been checked out”





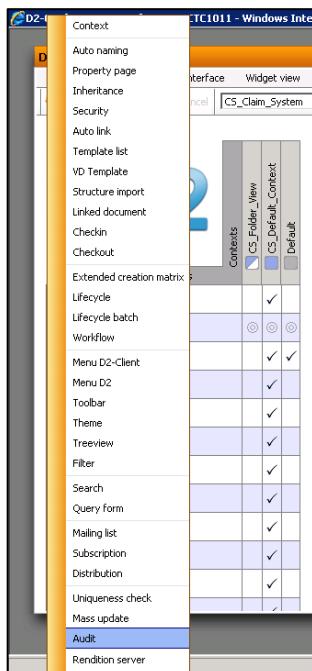
## D2 Config Labs



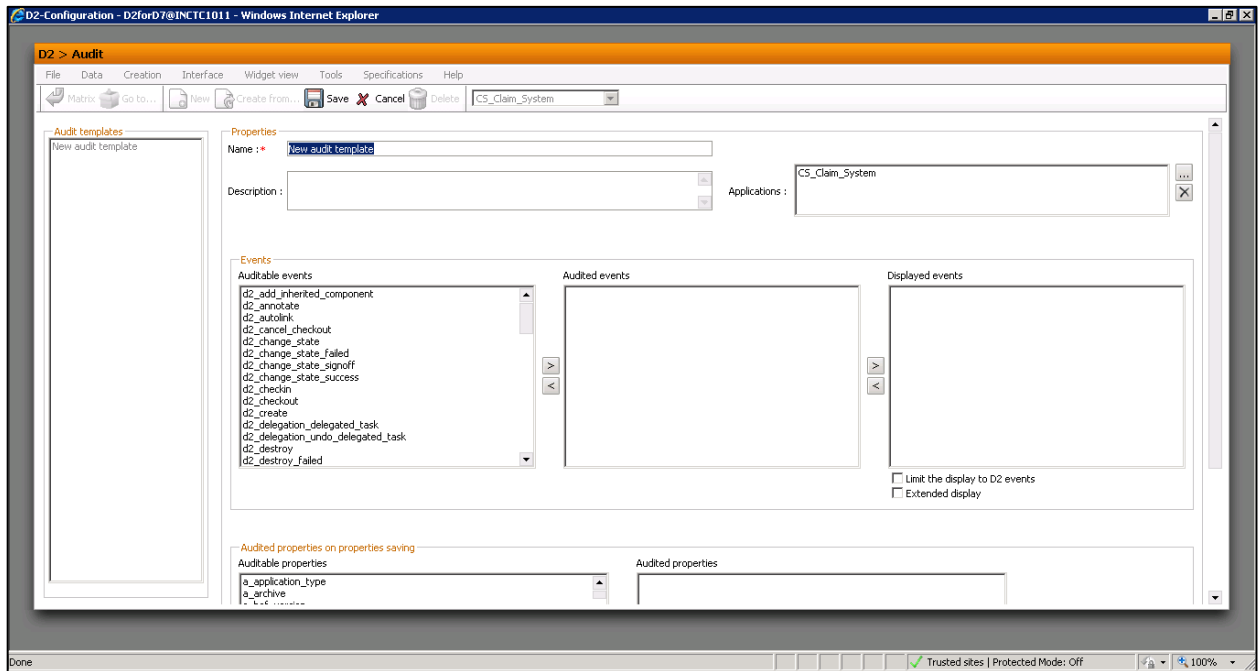
9. Save the Subscription Template.
10. Click "Matrix" to return to the configuration matrix and link the required context.

### Create Audit

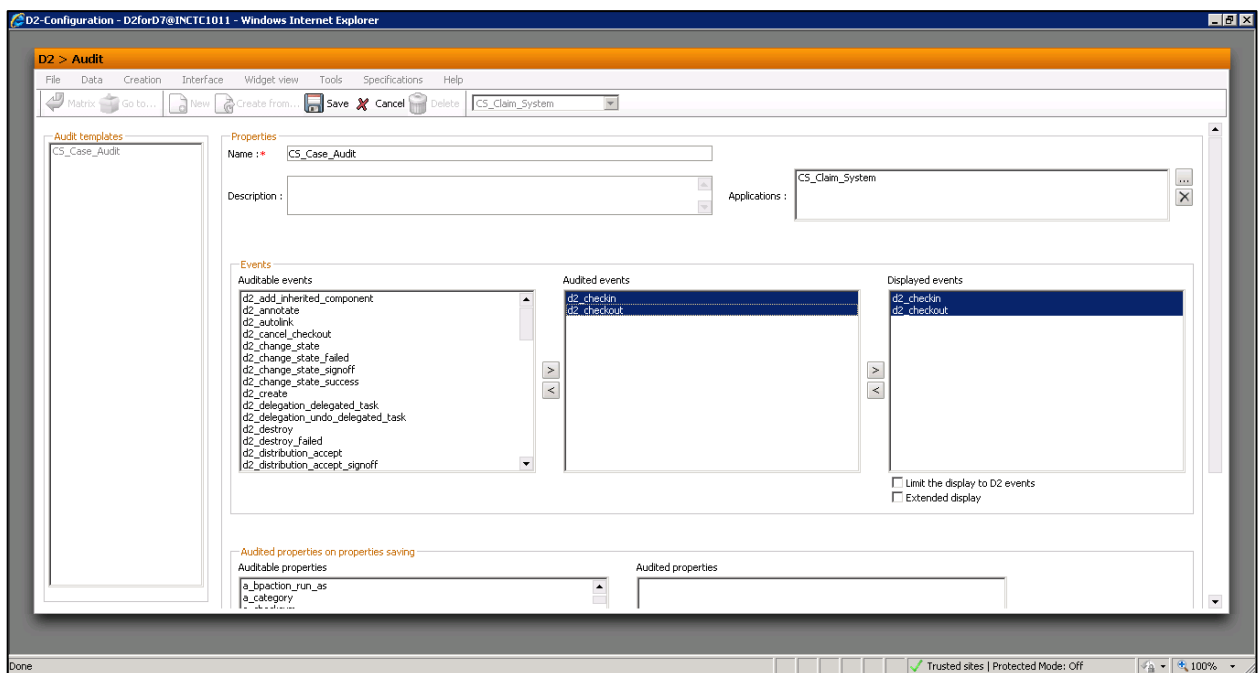
1. Go to File-> New -> Audit -> A new Audit page creation will open as shown in the below screenshot



## D2 Config Labs



2. Enter the "Name" as CS\_Case\_Audit
3. Enter the "Applications" name as CS\_Claim\_System
4. Select the d2\_checkin and d2\_checkout "Events"
5. Save the Audit page.

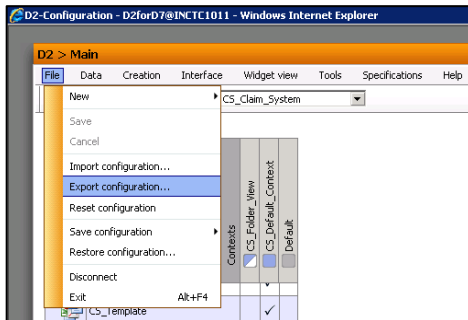


## D2 Config Labs

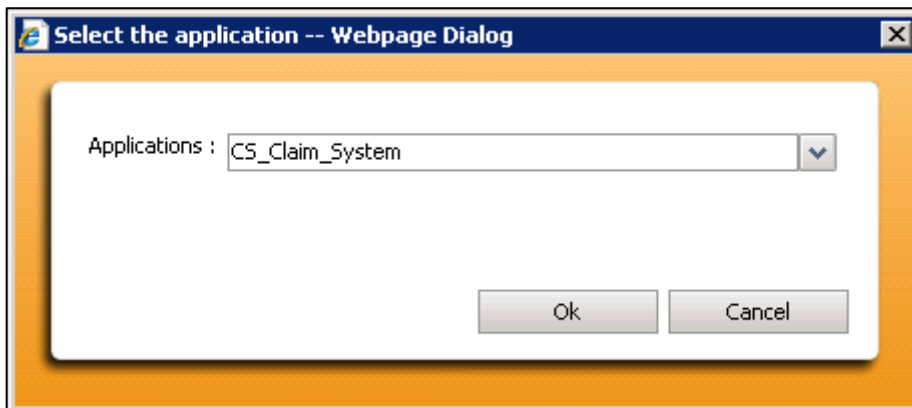
6. Go to Matrix view, and link the required document set.
7. Save the configuration matrix.

### Export D2 Application

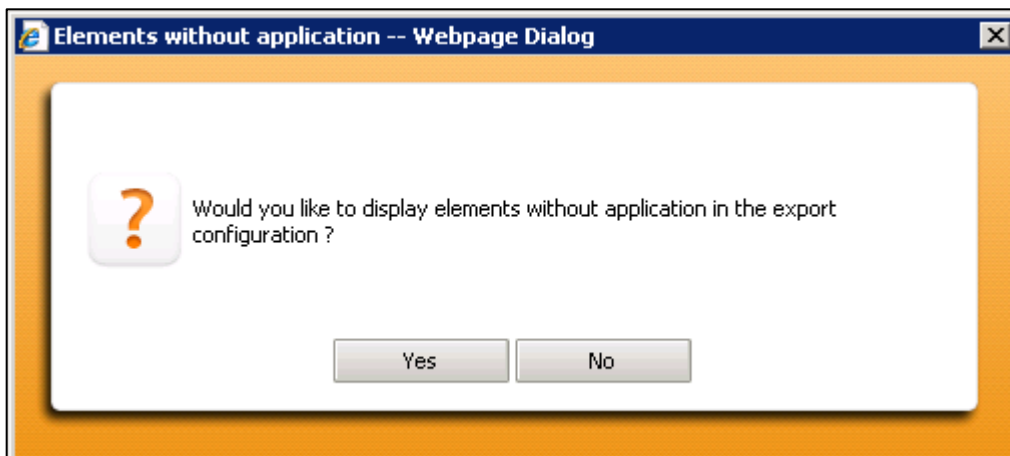
1. Go to File-> New -> Export configuration -> Applications selection window will displayed as shown in screen shot-1.



2. Select the CS\_Claim\_System application and click on Ok button.

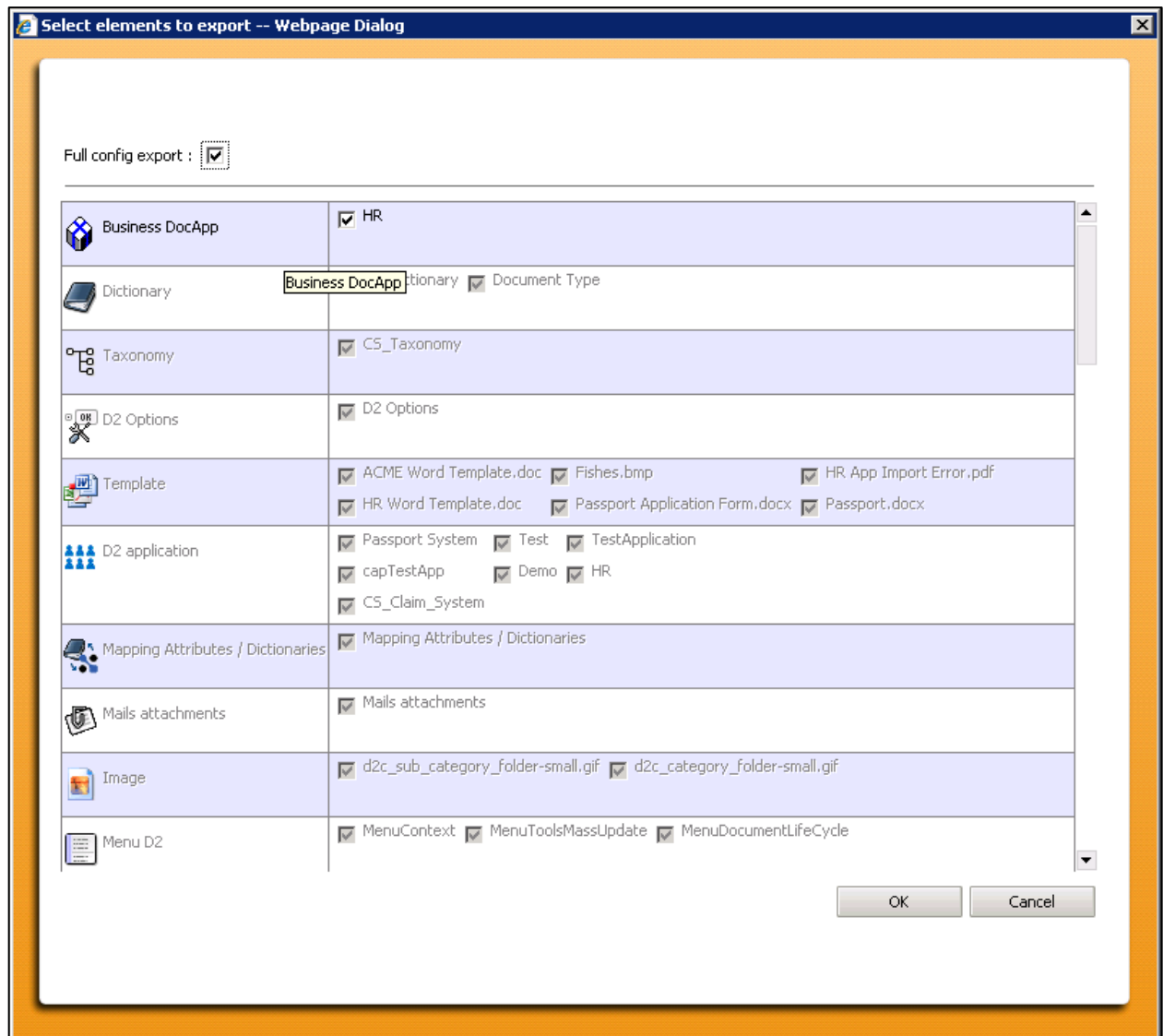


3. Click No



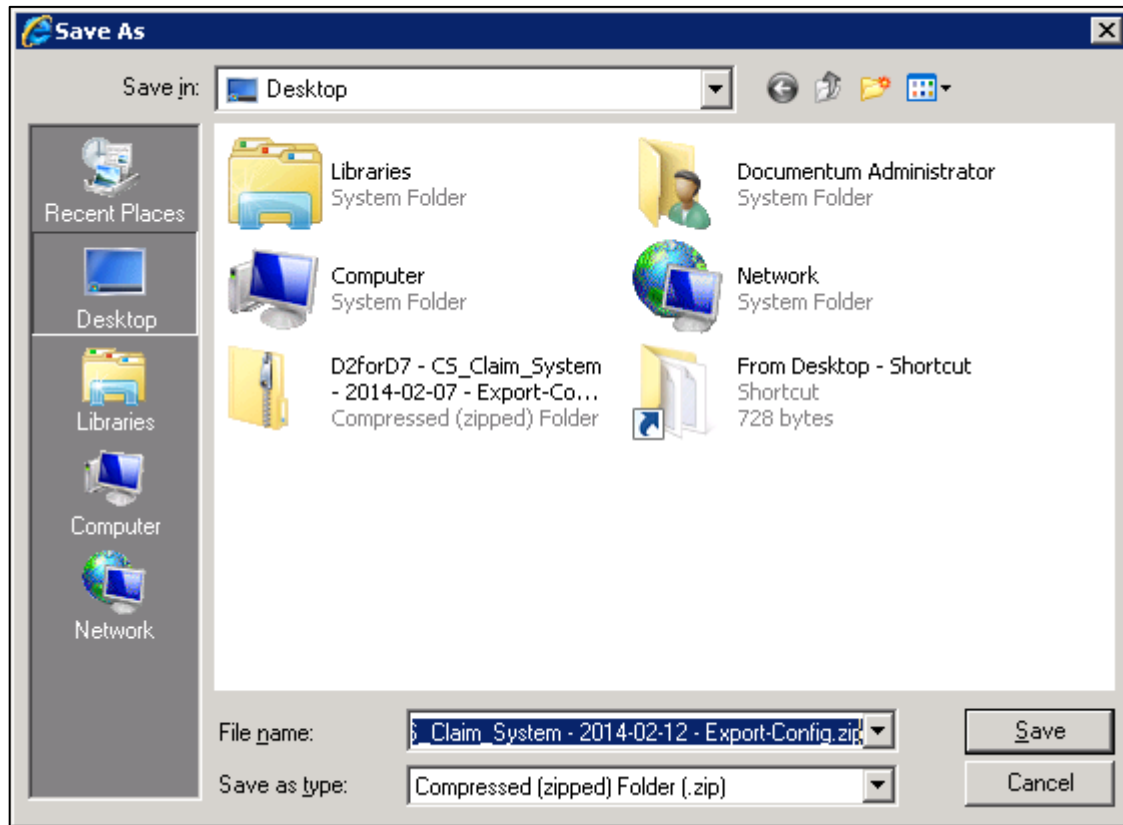
## D2 Config Labs

4. Elements selection window will be shown
5. Check the Full config export box.
6. Click OK



7. Choose the path to save the configuration.

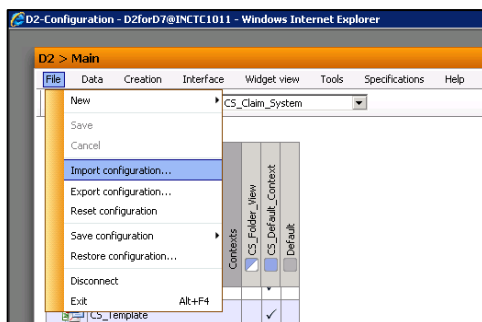
## D2 Config Labs



8. The application configuration is saved on the selected path in ZIP format.

### ***Import D2 Application***

1. Go to File-> New -> Import configuration



2. Select the Application configuration from your local desk to the D2-Config.

End of Lab 2