Documentum D2 4.x Training

Rajendra P. S.

GOLOKA SOFTWARE
conscious value

D2 4.x Training Agenda

Day 1

D2 Overview

- D2 Product Overview
- D2-Clients
- D2-Config
- Technical Architecture

D2 Configuration Business Scenario

- Overview
- Business Requirements
- Pre-configured Objects

D2 3.1 Client Overview

- D2-Client
- User Interface
- Options
- Managing Documents
- Searching

Day 1

D2 4.x Client Overview

- Overview
- User Interface
- Managing Documents
- Searching
- Conclusion

Day 2

D2 Base Configurations

- Configuration Cache Refresh
- Contexts
- Configuration Matrix
- Renditions

GOLOKA SOFTWARE
conscious value

D2 4.x Training Agenda

Day 2

Configuring Workspaces

- Configuration Steps
- Widgets
- Themes
- Workspace Structure XML
- Workspaces
- External Widgets
- Troubleshooting

Day 3

Basic Configurations for Content

- Overview
- Dictionaries
- Taxonomies
- Property Pages
- Creation Matrix
- Default Values
- Inheritance

Day 3

Additional Content Creation

- Template Lists
- Security Templates
- Auto Naming
- Auto Linking
- Linked Documents

Day 4

Configuration for Document

- Check-in
- Checkout
- Audit
- Relationships
- Subscriptions
- Structure Import

GOLOKA SOFTWARE
conscious value

D2 4.x Training Agenda

Day 4

Advanced Property Pages

– Business Scenario

– Dictionaries

– Property Page

– Default Values

– Matrixes

– Verification

Day 5

Lifecycle Configuration

– Lifecycles Overview

– D2 Lifecycles

– State Configuration

– Condition Configurations

– Dialog Box Configuration

– Automatic Transition Configuration

Day 5

Workflow Manager

– Workflow Overview

– Workflow Templates

– Activities

– Performers

– Flows and Packages

– Installation

Day 5

D2 Workflow Configuration

– D2 Workflows

– Basic Configuration

– Electronic Signature Configuration

– Entry Requirement Configuration

– Task Priority

– Ordering Tasks

– Document Distribution

GOLOKA SOFTWARE
conscious value

D2 4.x Training Agenda

Day 6

Search Configuration

- Search Overview
- Search Configuration
- Query Forms

UI Configuration

- Menus
- Toolbars
- Tree View/Nodes
- Display Filters
- Display Configuration
- Themes

Managing Application

- Configuration
- Check In and Restore
- Export and Import
- Create Specifications
- Document Dump

Day 7

Additional Client Features

- Annotations
- Hyperlinks
- Managing Documents
- Exporting
- Notifications
- Favorites

Virtual Documents

- Virtual Documents
- Working with Virtual Documents
- Snapshots

GOLOKA SOFTWARE
conscious value

D2 4.x Training Agenda

Day 8

D2 Office Integration (O2)

– O2 Overview

– O2 Configuration

– Office Configuration

– D2 Configuration

– Using O2

D2 PDF Configuration (C2)

– C2 Overview

– C2 Configurations

– Using C2

D2 Recycle Bin (D2 Bin)

– D2-Bin Overview

– D2-Bin Configuration

– Using D2-Bin

D2 Customization with Plugin Framework.

– D2 Customization overview

– D2 Plugin Overview

– D2 Plugin Development & Demo

GOLOKA SOFTWARE
conscious value

Documentum D2 Overview

Overview of Prerequisites

Prerequisites

- Basic understanding of Content Server

  via Technical Fundamentals Training or similar courses
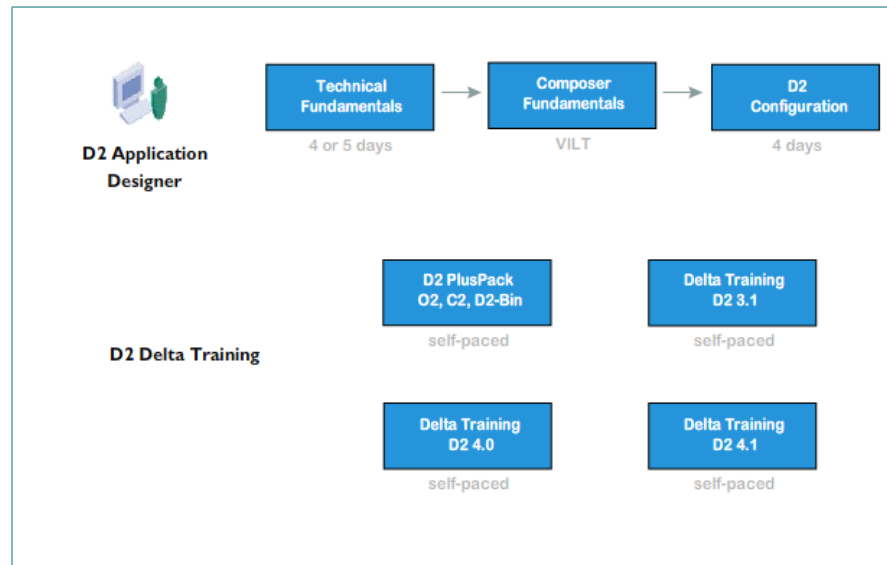
The Challenges

- ✓ Long delay to implement solutions on the Documentum Platform

- ✓ Difficult migrations from one version of Documentum stack to another

- ✓ Start-up of new process or internal standards is long and expensive

- ✓ High cost of changing requirements

- ✓ Lack of responsiveness to business requirements.

GOLOKA SOFTWARE
conscious value

1

The Answer – Documentum D2

- Modern and Intuitive User experience for Documentum through a new 'Thin Client'

- Configuration framework for fully configurable solution

  - ➢ Shorten Implementation cycle time

  - ➢ Minimize validation & change request impact on delay & cost.

  - ➢ Facilitate deployment of new projects build on Documentum

  - ➢ Make Documentum migration easier and quicker.

GOLOKA SOFTWARE
conscious value

D2 Overview

What is D2 ?

Documentum D2 is a web-based application that enables users to store, retrieve, and manage documents in a Documentum repository.

It is highly customizable through a configuration application that does not require programming knowledge.

- ✓ Powerful configuration services tool with a spreadsheet-style approach.

- ✓ Enhances Documentum – Uses the fastest and most powerful platform available for content-centric application creation and deployment using D2 components such as dynamic ACLs, Lifecycles etc.

- ✓ Delivers Rapid Value – Eliminates the need for custom coding and enables the creation of application-specific templates that can be deployed across the enterprise.

GOLOKA SOFTWARE
conscious value

D2 Overview

- **Documentum D2 consists of the following components:**

  - ✓ D2 Configuration: The configuration application that enables you to configure settings for security, workflows, document classification, and the client user interface.

  - ✓ D2 Client: The main application that is used to interact with documents in the repository.

- **D2 comes in 2 flavors**

  - D2 premium

    - ➢ D2 Client : Intuitive UI providing advanced document management features.

    - ➢ D2 Config : Administration tool for developers, designers and administrators.

  - D2 plus pack

    - ➢ Based on the purpose and use it provides different plugins like O2, C2, D2-Bin, IRM, RPS & BOCS.

GOLOKA SOFTWARE
conscious value

D2 Overview

1

D2 Overview (Continued…)

- D2 Client 4.x: From D2 Client 4.x, EMC has provided an explicit UI for the end users by adding new features like Themes, Widgets and Workspaces.

Workspace

Widgets

Blue Color Theme
(Line & Button)

D2 Overview (Continued…)

- D2 Config: D2 Config is a Administration UI to configure defined components and other configurations like Contexts, Dictionaries, LDAP, Search etc.

Contexts

Matrix Page →

Components

Configuration elements	Admingroup	Simple access	HR Consumer group	HR Contributor group	HR Draft documents	HR In Review documents	HR Approved documents	HR Obsolete documents	HR Documents	Public Folder	Directive folders	Instruction folders	HR Folder	Procedure folders	Non Current documents	PDF Documents	Not PDF Documents	Default
AN HR Docs									✓									
PRP Default																		
PRP HR Docs									✓									
PRP HR Folder													✓					
PRP HR Mass Update - Zone - Country																		
PRP HR Simple Access		✓	✓															
PRP LC Application date																		
PRP LC Expiration date																		
PRP QueryForm HR Zone - Country																		
PRP QueryForm Read and Understood																		

GOLOKA SOFTWARE
conscious value

D2 Overview – New Features

- **Advanced Content Management & Search –** A broader set of advanced document management and content control capabilities; Enhanced search capabilities to easily understand the results and find the right content from those results

- **Usability –** Added productivity through additional drag and drop, mobile support and additional viewing capabilities

- **Enterprise Configuration & Focus –** New abilities to secure a configuration from unwanted changes as well as preserving configurations using version control; Unique set of configuration options to brand the UI to conform to business standards, as well as options for content transfer that require nothing to be installed on the desktop

GOLOKA SOFTWARE
conscious value

D2 Overview – New Features

ADVANCED CONTENT MANAGEMENT & SEARCH

- Bulk import of content and metadata (with XML)

- Recycle bin for deleted content

- Subscriptions – events and content

- Intelligent URL with enhanced parameters

- Email content as a link/attachment

- Associated documents creation process

- Bulk folder export with content (only java applet mode)

- Search summaries with term hit highlighting

- Editable Properties widget

- Embedded PDF viewer

- VD Snapshots

GOLOKA SOFTWARE
conscious value

D2 Overview – New Features

Usability

➢ Drag & drop emails from outlook with attachment with O2 configurations – Create

Relations and/or Virtual Documents

➢ Drag & drop URLs from D2 (export)

➢ Drag & drop into D2 on Mac OS (import)

➢ Clipboard actions – cut/copy/paste/link

➢ iPad support (via Safari)

➢ Simplified & configurable content creation wizard

➢ Workspace views

➢ Context sensitive widgets and views

➢ Add/remove widgets in the workspace

➢ Lock down workspace

➢ Expand/collapse widgets in the workspace

➢ Misc. portal enhancements – logout button, Search toolbar, 'group by' for content

GOLOKA SOFTWARE
conscious value

D2 Overview – New Features

Enterprise Configuration & Focus

- ✓ Granular Export of D2 configurations

- ✓ Lock down the base application to prevent editing of the OOTB configurations

- ✓ Repackaging of D2 configurations

- ✓ 'Create from' in D2-Config to maintain a reference to parent

- ✓ O2 configurations during content import

- ✓ Custom Branding of the UI – Custom Logo; custom icons for formats and types; dynamic status icons

- ✓ Thin client content transfer - HTTP (HTML5)

- ✓ Enhanced configuration options for Internal widgets

GOLOKA SOFTWARE
conscious value

D2 Overview – New Changes

- **Dropped**
  - support for Internet Explorer 8 regardless of OS platform
  - support for XP

- **Changes/Additions**
  - JBoss app server only supported with Content Server version 6.x
  - Tomcat 7.0.40 certified app server
  - tC 2.9.x certified app server
  - Java JRE 7.0 update 25 certified JRE
  - Documentum Content Server 7.1 certified
  - Added Apple iPad using Safari, iOS 6.1.3 certified, iOS 7.x supported.
  - Added Mac OSX using Google Chrome
  - Release of SDK for D2 4.2 better defines what is supported, useable by customers.
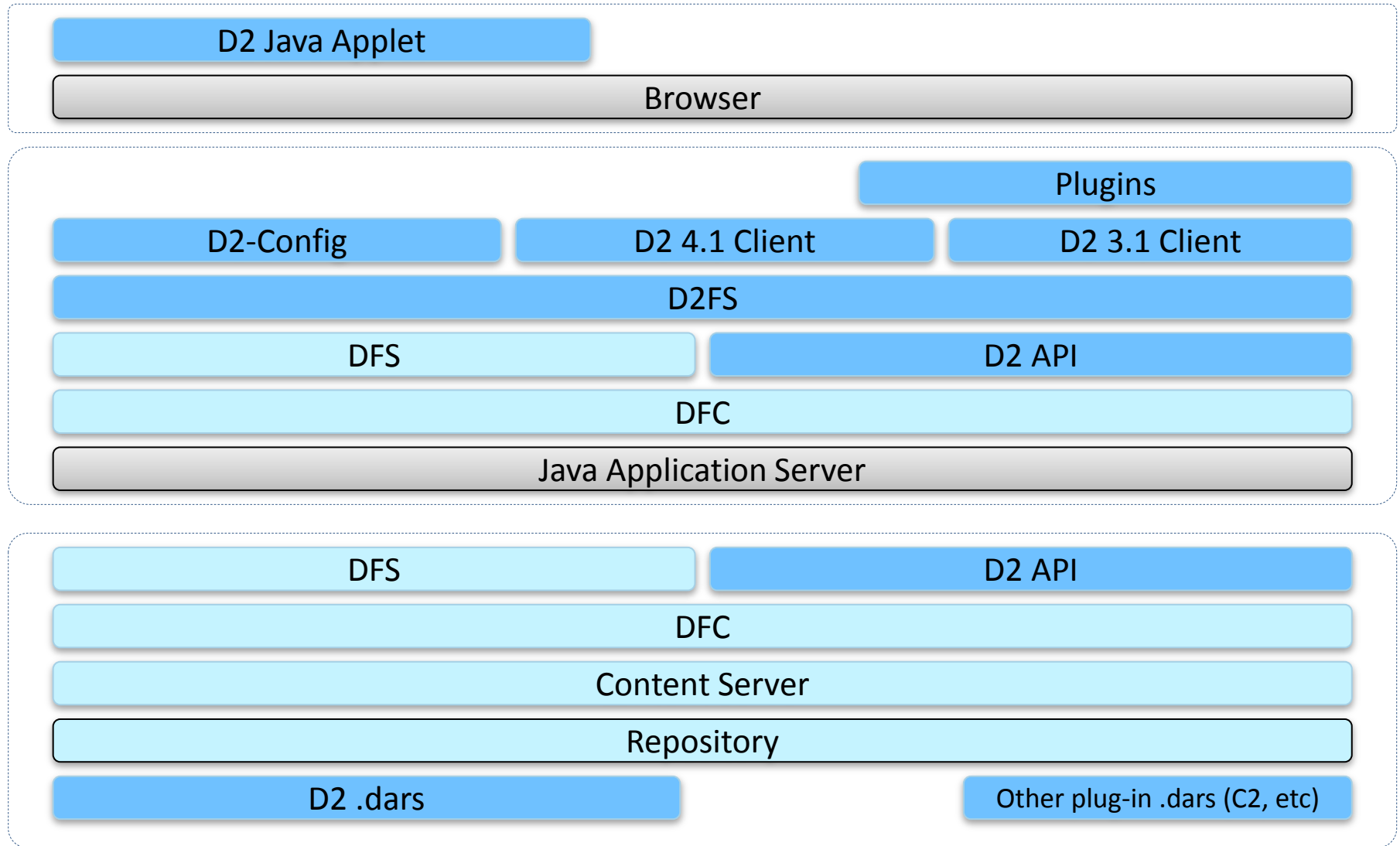
Note : Always refer to release and patch notes for latest/complete details.

GOLOKA SOFTWARE
conscious value
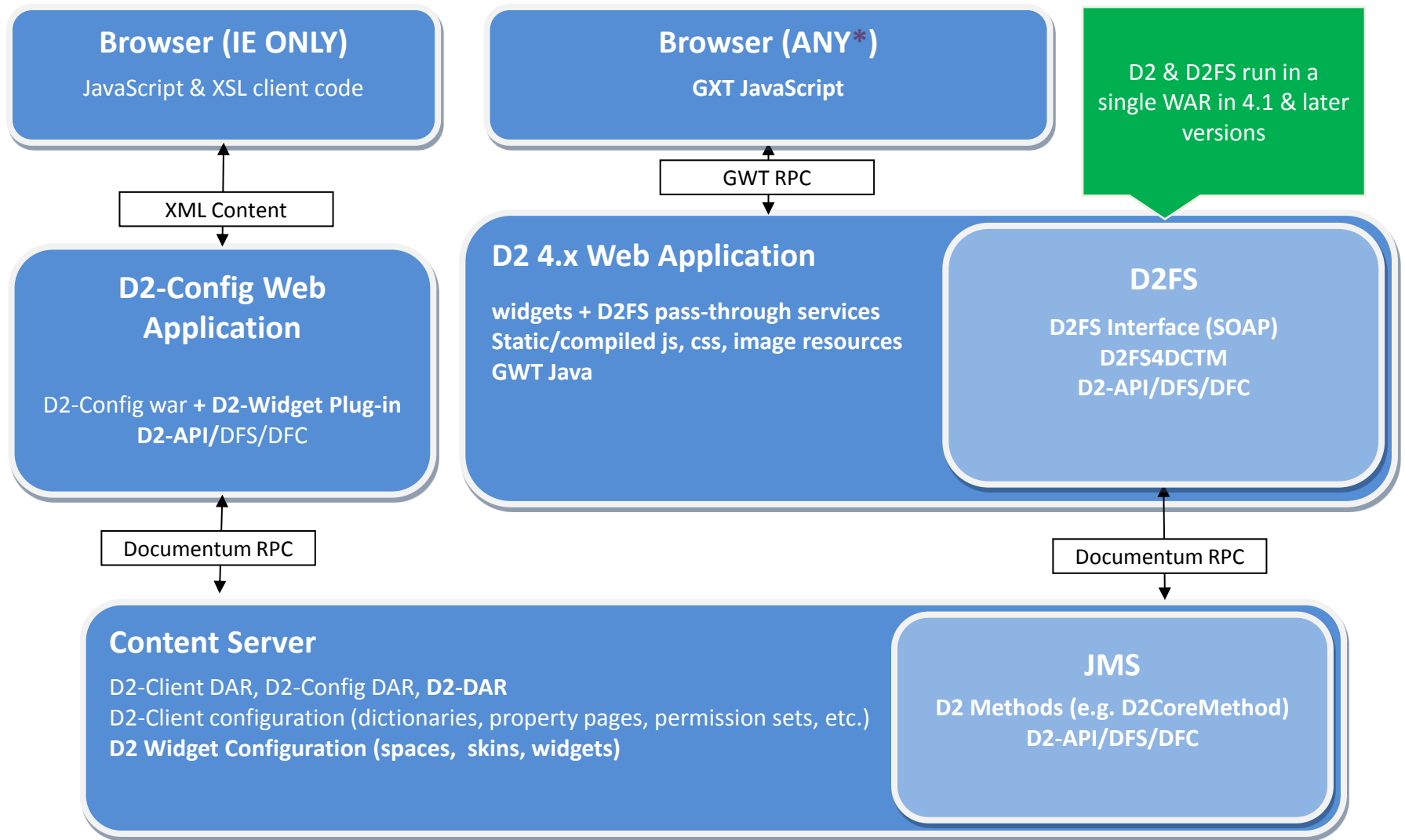
Documentum D2 Architecture

D2 Architecture

- **A 3-tier Application**
- **Tier #1: Client (Browser)**
  - Ext GWT (java libraries for Google Web Toolkit) or
  - Download/Upload Documents via Java Applet
- **Tier #2: Application Server (J2EE) running 2 distinct apps**
  - D2-Config Web app (War), D2 4.1 Client Web app (War)
  - D2 File Services (D2FS), D2 API, DFS & DFC
  - GWT Java
  - D2 plug-in dlls, jars
  - App server runs queries, modifies document properties, calls JMS methods
- **Tier #3: The Servers (Repositories, CTS, Thumbnail Server, ACS/BOCS, RPS)**
  - D2 and D2Widget applications installed into repository
  - D2 API & DFC
  - D2 plug-in jars, docapps
  - Applies the configurations (Security, Auto link, Lifecycle, etc.), runs workflow methods
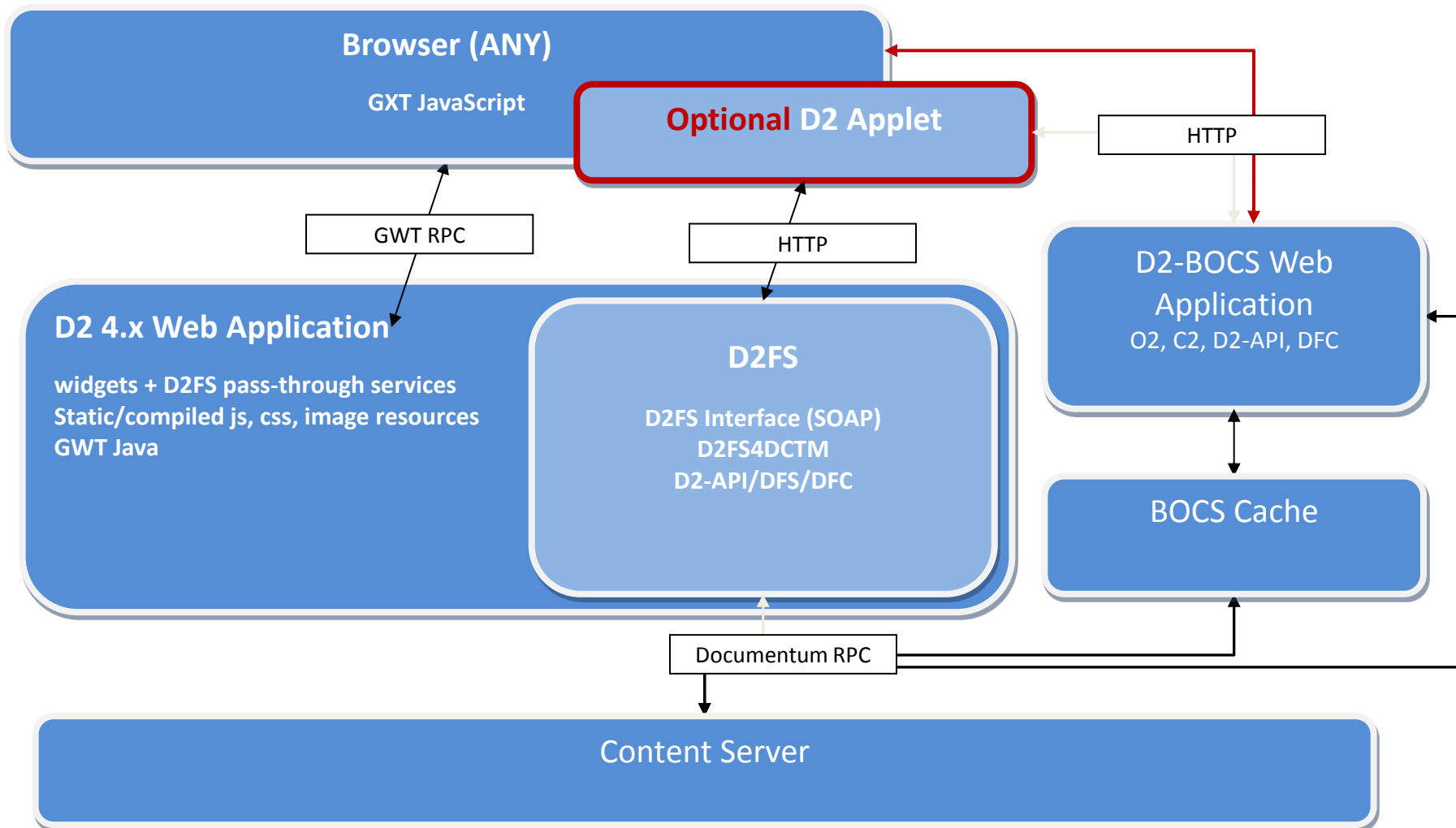
D2 Architecture – Component Architecture

D2 Java Applet

Browser

		Plugins
D2-Config	D2 4.1 Client	D2 3.1 Client
D2FS		
DFS	D2 API	
DFC		
Java Application Server		

DFS	D2 API
DFC	
Content Server	
Repository	
D2 .dars	Other plug-in .dars (C2, etc)

GOLOKA SOFTWARE
conscious value

D2 Architecture

Browser (IE ONLY)

JavaScript & XSL client code

Browser (ANY*)

GXT JavaScript

D2 & D2FS run in a single WAR in 4.1 & later versions

GWT RPC

XML Content

D2-Config Web Application

D2-Config war + **D2-Widget Plug-in**
D2-API/DFS/DFC

D2 4.x Web Application

widgets + D2FS pass-through services
Static/compiled js, css, image resources
GWT Java

D2FS

D2FS Interface (SOAP)
D2FS4DCTM
D2-API/DFS/DFC

Documentum RPC

Documentum RPC

Content Server

D2-Client DAR, D2-Config DAR, **D2-DAR**
D2-Client configuration (dictionaries, property pages, permission sets, etc.)
D2 Widget Configuration (spaces, skins, widgets)

JMS

D2 Methods (e.g. D2CoreMethod)
D2-API/DFS/DFC

GOLOKA SOFTWARE
conscious value

D2 Architecture - Changes in 4.2 vs 4.0

- D2 4.0 client was composed of two web applications (.war packages)

  - ➢ D2, the portal into D2

  - ➢ D2FS, what connected D2 into the repository

- D2 42 client is composed of a single web application (.war package)

  - ➢ D2, includes the portal and D2FS components in a single .war package

- API's/Methods have gone through a domain name change from eu.c6 to com.emc

  - ➢ Impacts customers who have built plug-ins that utilize API's/Methods that call eu.c6. They will need to modify to call com.emc instead.

GOLOKA SOFTWARE
conscious value

D2 Architecture – Content Transfer

Browser (ANY)

GXT JavaScript

Optional D2 Applet

HTTP

GWT RPC

HTTP

D2 4.x Web Application

widgets + D2FS pass-through services
Static/compiled js, css, image resources
GWT Java

D2FS

D2FS Interface (SOAP)
D2FS4DCTM
D2-API/DFS/DFC

D2-BOCS Web Application
O2, C2, D2-API, DFC

BOCS Cache

Documentum RPC

Content Server

GOLOKA SOFTWARE
conscious value

D2 Architecture – Underlying Technology

- D2FS is a Java API exposed in the D2 4.x web application as a set of SOAP endpoints. All traffic between the D2 client and the Documentum content server passes through the D2FS API.

- Sencha GXT, or Ext GWT, is an extension to Google Web Toolkit that renders Ext JS controls on the browser, rather than the standard GWT controls. It provides a nicer user experience than the standard GWT controls, while still allowing the programmer to write applications in Java rather than JavaScript. It is not directly compatible with the standard Ext.js library that is used in xCP.

- iText used for C2 watermarking.

GOLOKA SOFTWARE
conscious value

D2 Integration Points

- **D2 4.2 interoperates with other products from EMC/Documentum family:**

  - ➢ Thumbnail Server can provide thumbnail previews of documents

  - ➢ ADTS can be used to generate renditions

  - ➢ Retention Policy Services can be used to automate content retention and disposition.

  - ➢ Documentum Search Services (xPlore) can be configured

  - ➢ RPS

- **New for D2 4.2**

  - ➢ IRM

  - ➢ External Widgets Communication

GOLOKA SOFTWARE
conscious value

D2 Customization

➢ **External Widgets**

➢ **D2FS Listener Plug-ins**

➢ **Custom Actions**

GOLOKA SOFTWARE
conscious value

D2 Configuration Business Scenario

GOLOKA SOFTWARE
conscious value

Business Scenario

- XYZ Incorporated, a world wide manufacturing company is adopting formal Quality management methodology.

- The Corporate objectives of this initiative are

  - ➢ Improve the Quality

  - ➢ Enhance customer satisfaction

- Increase operational efficiency and productivity.

- The quality management process requires documenting all quality procedures, directives and instructions

  - ➢ Over time, a large number of documents will be created.

EDMS for Quality related documents

- XYZ decides to implement EDMS to store and manage the quality system

  related documents

- Constraints and requirements for the EDMS

  - ➢ The system must support worldwide users and a large number of documents.

  - ➢ The application must be easily adaptable to changing business requirements.

  - ➢ The end user interface must be intuitive and easy to use.

Solution

- XYZ has decided to build the quality management application using EMC

  Documentum D2

  ➢ The EMC Documentum platform was chosen for its rich functionality and

  enterprise scalability.

  ➢ D2 was chosen for its ease of configuration and initiative user experience.

GOLOKA SOFTWARE
conscious value

Users

- A cross functional group of employees has been trained in the new Quality

  Management methodology

  ➢ Individuals in this group will use Quality Management application to create,

     review, approve and manage the Quality process Documentation.

GOLOKA SOFTWARE
conscious value

Document Types

The Quality Management application will be used to manage the following types of Documents

- **Directives**

  ➢ Written orders mandated by Company HQ. (Ex. Mandatory Training)

- **Instructions**

  ➢ Provide precise directions for carrying out a task.

  ➢ For Example an Instruction document would describe the process for maintaining a certain piece of equipment.

- **Procedures**

  ➢ Describe general process

  ➢ Example - A Standard operating procedures

GOLOKA SOFTWARE
conscious value

Business Requirements

XYZ requires that the Quality Management Application enforce certain

business rules,

- ➢ Document Creation Rules.

- ➢ Property Value Rules

- ➢ Security Rules

- ➢ Document Version rules.

- ➢ Security Rules

- ➢ Event Auditing

- ➢ Document Relationship

- ➢ Document Lifecycle.

- ➢ Automated Workflow

- ➢ Customized Searches

- ➢ Tailored user interface.

Document Creation Rules (1 of 3)

Document Creation rules should be enforced for members of the

quality_workgroup

- Document auto naming

  ➢ Name documents based on type, year, and a unique sequence number:

    Quality_*{type}_{year}_*num_{sequence number}

- Fixed folder plan (auto_link)

  ➢ Store documents in a folder based on type and category:

    Quality Workgroup*{type of document}*\\{category}

- Content Template

  ➢ Users can chose from two Microsoft Word templates:

    Blank Document.doc & Quality Document.doc

GOLOKA SOFTWARE
conscious value

- Default property values

  - For Directives:

    - title should be set to:
    - Quality Directives from Headquarters {today's date}

  - For Procedures:

    - title should be set to:
    - Procedures from the Services Desk office - {today's date}
    - Author should be set to :
    - The name of the user creating the document

- Properties Inheritance

  - For Instructions, users should be able to select and existing document and have the following property values from the selected document automatically applied to the new document **a_category, application_services, drafting_services, former_code, keywords, regional, target, title**

GOLOKA SOFTWARE
conscious value

Document Creation Rules (3 of 3)

- **Automatically associate a change request to a Procedure (linked document)**

    - When creating a procedure document user must have the option to create a Change Request Document associated with the procedure.

    - Change request document can only be created in conjunction with creation of Procedure

    - User can optionally set the subject and title of the change request

    - Change request document should:

        – Be automatically named : CR*{sequence_number}*

        – Be automatically linked to folder: /Quality Workgroup/CR

        – User content template : Change Request.doc

Property value rules (1 of 4)

- Ensure valid attribute values

  - ➤ Value Assistance - Users should only be able to select from a list valid attribute values for certain attributes.

  - ➤ Conditional Value Assistance - Some attributes value lists depend on the value selected for another attribute

  - ➤ Value Mapping - The display value for certain attribute is different than the saved value

    - ✓ The display value might be a language specific label

    - ✓ Or it might be an alias for the value.

- D2 Dictionaries and taxonomies can be used to create attribute value lists, conditional value assistance and value mapping

GOLOKA SOFTWARE
conscious value

Property value rules (2 of 4)

- Quality Doc Types Dictionary

  - Valid values for r_object_type

    - Key - English

    - CR - Change Request

    - directive1 - Directive

    - instruction1 - Instruction

    - procedure1 - Procedure

- Quality Doc Category Dictionary

  - Valid values for a category

    - Key   - English

    - equipment - Office and equipment

    - people - People and Organization

    - production - Production and Distribution

    - qc - Quality Control

    - quality - Quality Management

GOLOKA SOFTWARE
conscious value

Property value rules (3 of 4)

- Quality Department Dictionary

  ➢ Valid values for drafting_services and application_services

    – Key - English

    – EN - Engineering

    – FI - Finance

    – HR - Human Resource

    – QA - Quality Control

    – SS - Sales

- Quality Region Dictionary

  ➢ Valid values for a category

  ➢ An alias (Sales Region) can be displayed

    – Key - English

    – APAC - Asia Pacific

    – EMEA - Europe and Middle East

    – NA - North America

GOLOKA SOFTWARE
conscious value

Property value rules (4 of 4)

- Quality Language Dictionary

  - ➢ Valid values for language_code

    - Key - English
    - DE - German
    - EN - English
    - ES - Spanish
    - FR - France
    - IT - Italian

- Quality Doc Taxonomy

  - ➢ List value categories for each Document type

    - ✓ Quality Doc Taxonomy

      - directive1

        - equipment

      - instruction1

      - procedure1

GOLOKA SOFTWARE
conscious value

Security Rules

- The appropriate Permission set should be automatically assigned to document

  ➢ upon creation

  ➢ When a document transition from one lifecycle state to another.

draft permission - directive (draft)

review permission - directive (review)

Document Versioning Rules

- Check-in Rules

  ➤ Upon check-in the user must provide a log entry to explain the reason for the new version.

  ➤ Major version numbers cannot be used - only minor versioning is allowed

- Checkout Rules

  ➤ Version branching is not allowed, therefore user cannot check out non-CURRENT version.

GOLOKA SOFTWARE
conscious value

Event Auditing

- XYZ's legal department requires that an audit trail be kept of the following events

  ➢ Document Check-in

  ➢ Document Checkout

  ➢ Save Properties

- The Value of the title property should be recorded in the audit record.

Document Relationships

- Users should be able to create the following document relationships

  ➤ Interest - Users can create an Interest relationship between two document indicating that if they are reading one document, the related document might be interesting to read as well.

  to read also

  ➤ Reference - Document requiring one or more reference documents are associated with their reference document using a relation of this type.

  is a reference

GOLOKA SOFTWARE
conscious value

Document Lifecycle

- Business rules must be enforced as a document progresses through its lifecycle states

  - ➢ Transition condition checked

  - ➢ The a_status property automatically updated upon state transition

  - ➢ Appropriate security applied

GOLOKA SOFTWARE
conscious value

Automated Workflow

- The system must support automated Workflow, including manual and automated tasks, to automate the document approval process and associate lifecycle transitions

- Upon Workflow initiation

  ➢ Workflow entry condition - Document must not be locked

  ➢ User can select manual task performers (reviewers, approvers and rewriters)

- Some tasks require electronic signature

GOLOKA SOFTWARE
conscious value

Automated Workflow (Continued …)

- **Forward Flow**

➢ Initiate > Reviewing > Reviewers > Pending Approval (Automatic) > Approvers > Applicable (AUTO) > Noop End (AUTO) > End

- **Reject Flows**

➢ Reviewers > Draft (Auto)

➢ Approvers > Draft (Auto)

➢ Draft (Auto) > Rejected (Manual) > Noop End

Customized Search

- In the Advance Search dialog

  ➢ Users are restricted to searching only Directive, Instruction and

    Procedure documents

  ➢ A Value assistance list should be provided for the a_category property

- A query form should be provided that allows users to easily search by type

  and category

GOLOKA SOFTWARE
conscious value

Tailored User Interface

- ✓ Customize the Menu

- ✓ Customize the toolbar

- ✓ Customize the browser tree.

- ✓ Filter the documents displayed in the workspace

- ✓ Customize the column display

- ✓ Customize the UI colors

GOLOKA SOFTWARE
conscious value

Pre-Configured Objects in Documentum

- Use Composer to implement

  - ✓ Object Types

  - ✓ Relation Types

  - ✓ Permission Sets

  - ✓ Groups and roles

- Use Workflow Manager to define the workflow template.

GOLOKA SOFTWARE
conscious value

D2 3.1 Client Overview

D2 3.1 Client Interface

Menu bar

Short cuts bar

Workspace window (list of documents and properties)

Navigation window for DocBases' content and features

Virtual documents (VD) Editor

Tool bar for details selection

Details window to view complementary information on documents

GOLOKA SOFTWARE
conscious value

D2 3.1 Client Navigation

- **Opened DocBase** with Network Location

- **Inbox** (Tasks and Notifications)

- **Favorites**, direct link to favorite documents

- **Distribution** (quick validation of document)

- Docbase **checked out documents**

- **Administration node**
  - Dictionary, Taxonomy, Register table, Template
  - Groups and users management

- **Pre-defined searches**
  - Last, Personal, Public, Asynchronous

Docbase Cabinets

Tool bar for details selection   Details window to view complementary inf documents

Docbases
- dev_d2_300
- dev_d2_302
- dev_d2_310 (dmadmin)
  - Tasks
  - Notifications (590)
  - Delegations
  - Favorites
  - Distributions
  - Checked out documents
  - Administration
    - Dictionaries
    - Taxonomies
    - Registered tables
    - Templates list
    - P2 Manager Queues
    - Publish templates list
    - C2 rendition templates list
    - C2 view templates list
    - C2 print templates list
    - C2 export templates list
    - Users
    - Groups
    - Recycle bins
  - Searches
  - Cabinets
    - 1000 documents
    - 2011
      - Change request
      - d2c_workflow_tracker
      - Directive
        - object_name
      - Instruction
      - p2_application_root
      - Procédure

D2 3.1 Navigation into the Docbase

- Navigation is identical to that of the Windows explorer, to select a folder, mouse click on it

Information bar of the selected folder
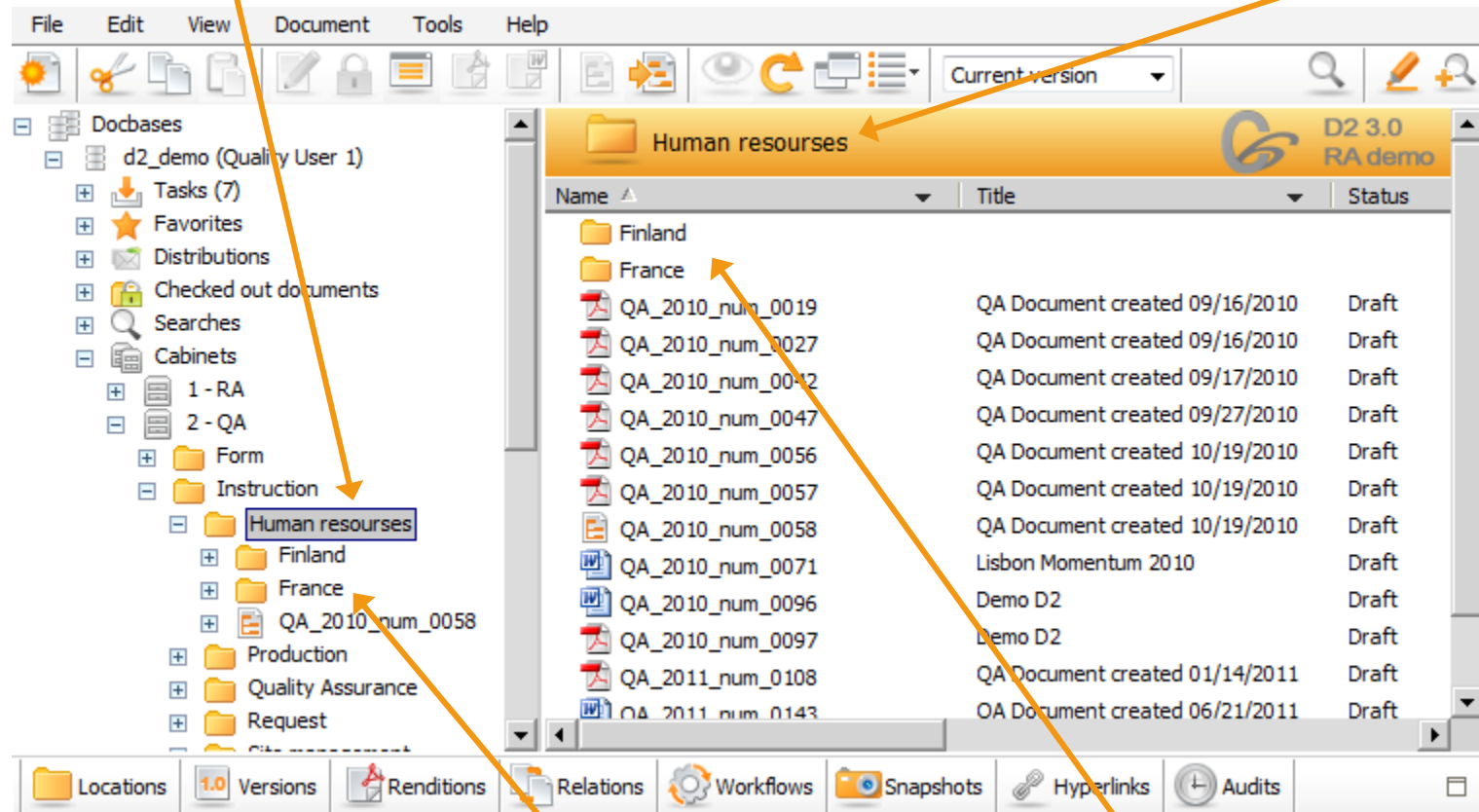
- The tree structure will be unfolded of a level and the contents of the folder displayed in the right-hand side window

GOLOKA SOFTWARE
conscious value

D2 3.1 Options

You can modify some options of D2-Client, click on the menu « Tools » then « Options … »
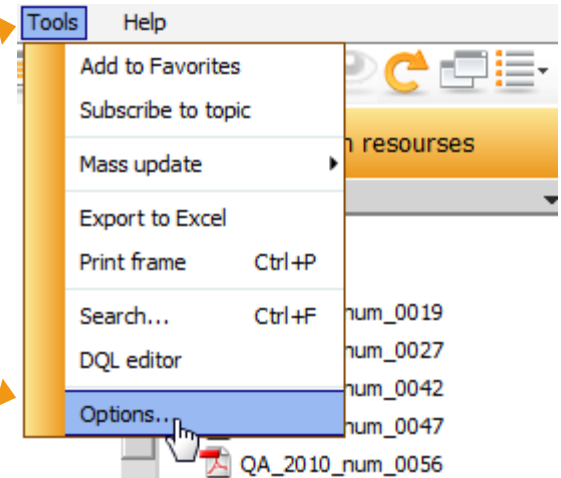
You can modify :

- The starting selected DocBase node in the Navigation window

- The temporary folder

- The working folder

- The date format

- The default user language

GOLOKA SOFTWARE
conscious value
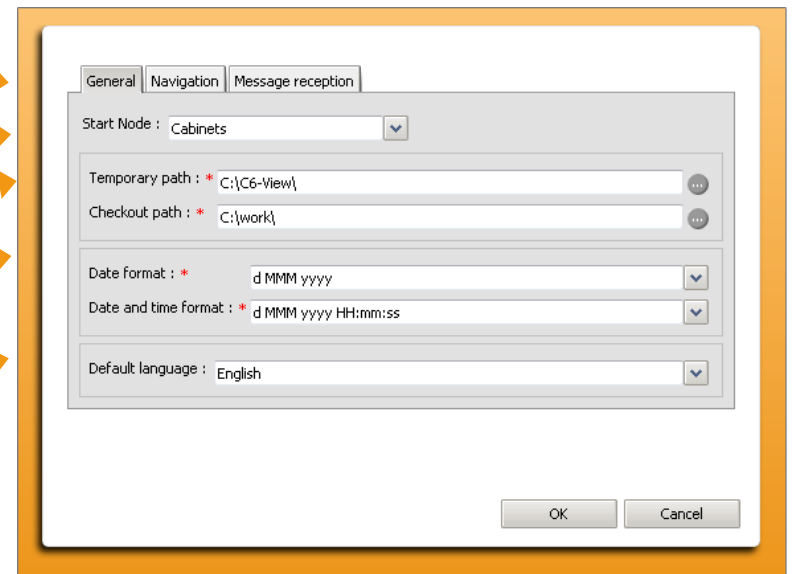
D2 3.1 Options (Continued…)

❑ Into « Navigation » tab, access to this following preferences to:

- Hide folders in main window
- Hide VD in Docbase browser
- Sort out by grouping folders into main window
- Activate or not interface pagination
- Disable the animation of sliding panels (to improve navigation performances)
- Define a default dimension to display thumbnails
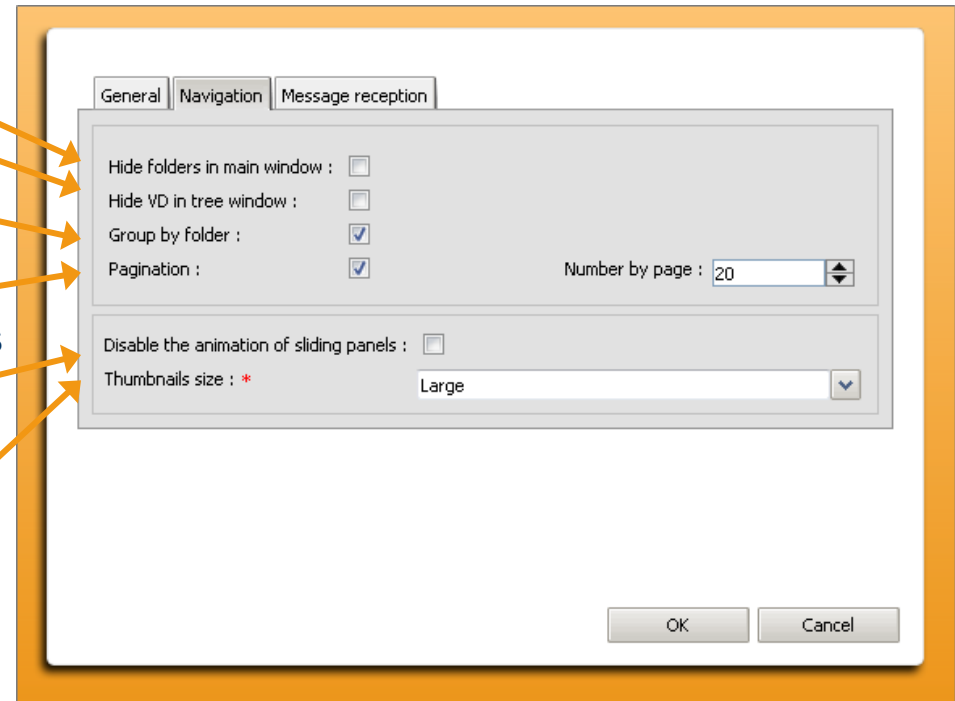
D2 3.1 Disconnecting from Docbase

- To disconnect yourself from the DocBase, click on the menu « File » then « Disconnect »
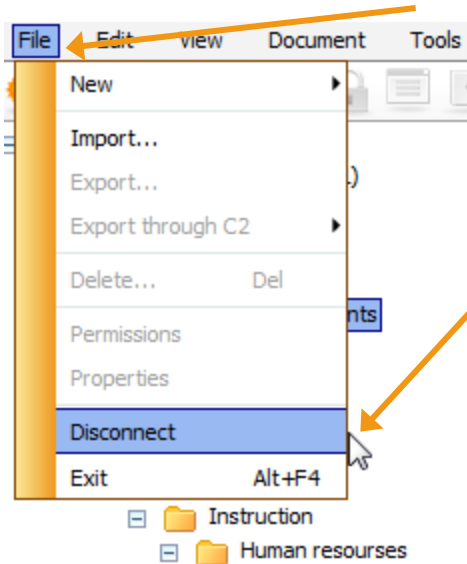
Then click on « Ok »
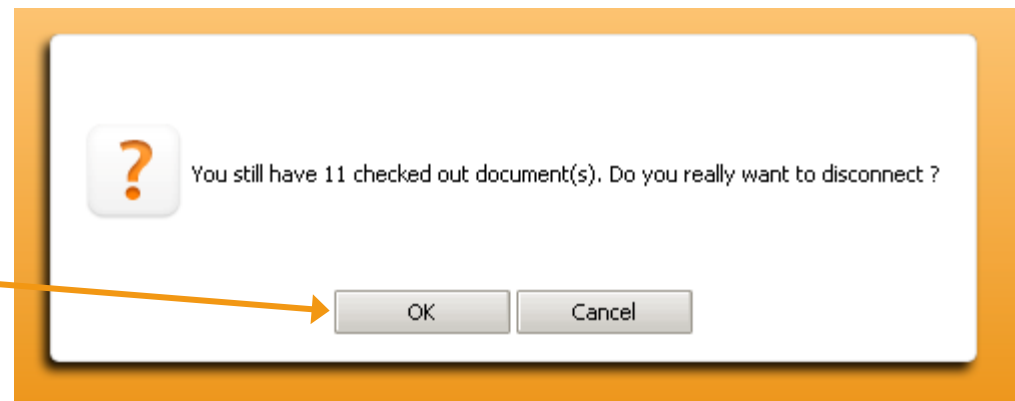
D2 Base Configuration

D2 - Configuring Workspace

Module Topics

✓ Configuration Steps

✓ Themes

✓ Widgets

✓ External Widgets

✓ Workspaces

✓ Workspace Structure XML

✓ Troubleshooting

GOLOKA SOFTWARE
conscious value

D2 Client Interface

- D2 offers a new User Interface of « Portal » type.

- With this new user interface, user can access the repository content using multiple browsers and a new browsing and full configurable approach.

- This portal is based on a dynamic and configurable user interface with widgets, themes and customizable workspaces.

- To use this web-portal, configure the following elements:

  - Theme

  - Widgets

  - Workspaces

- When external gadgets are used in the UI you have to specify the URL of Gadget server in Widgets options.

GOLOKA SOFTWARE
conscious value

D2 Widgets

- Widgets are GUI components used to display internal information, related to repository objects, or external within a web portal. Two types of widgets are available:

  - **Internal:** packaged with D2. Allowing browsing and display of information related to objects of a repository.

  - **External:** created by Administrator. To add external content (as Google Gadgets, websites...). Gadget server is needed to use Google Gadgets.

- To use widgets into a user web-portal, first you have to create them with the dedicated module of D2-Config.

- To do so, access the module using the Widget View menu or D2 configuration matrix.

GOLOKA SOFTWARE
conscious value

D2 Create Widget Module

- The settings of these graphical components are done with through this screen:

D2 Create Widget Module

- Populate the general properties of module: Name , Description, Application.

- Enter a label and a description for each application language. They will be displayed in the Widget Gallery of users.

- The internal available widgets are displayed in the following list « Widget type ». Select the desired type (see appendix widgets description):

- You can add, as it is done with workspace, a preview of widget.

- If this field is left empty, a default picture will be used in the Widget Gallery of users.

GOLOKA SOFTWARE
conscious value

D2 Internal Widget

- The « Internal » widgets are provided with D2. You will find the list and the description of these components in the appendix.

- To enable widget in the User Interface, select it in the dedicated list (see previous slide)

- A default preview is automatically linked to it in the user widgets gallery. However, this picture is editable by importing another file. Follow the size and the format supported by D2 (200*150 and only JPEG or PNG).

- Once the type selected and the module completed, associate this configuration to a user's context through configuration matrix.

- The widget, its description and its preview, will be available in the corresponding gallery of users.

GOLOKA SOFTWARE
conscious value

D2 External Widget

- To create an external widget, choose the combo list below "External gadget"

Widget type : * ExternalWidget ▼

- Once selected, new fields appears in the widget module.

Widget url : * ? $GADGET_SERVER/gadgets/ifr?url=$GADGET_SERVER/s

Communication channel :

or : X3_SHOW_DOCUMENT ▼

- It is possible for this "type" to add two sorts of URLs:

- Statics: used to browse websites within portal, for example.

- Dynamics: will be edited according to sent events by server.

- Enter an URL into the dedicated field.

- For a single browsing, add a static URL. Doing that, users will be able to access the content of website or another web content without sending event.

Widget url : * ? http://www.emc.com/domains/documentum/index.htm

GOLOKA SOFTWARE
conscious value

1

D2 External Widget

- You can also use a dynamic URL with placeholders related to document attributes.

1. For example, you can launch a search in Wikipedia using value of document property

2. Then, select a channel which will make possible the content refresh of the widget.

3. In the example below, the content of the widget will be refreshed when selecting a

   document.

   Communication channel : [   ]

   or : X3_SHOW_DOCUMENT ▼

4. In practice, in the User Interface a search will be launched via Wikipedia using the value

   entered in the "keywords" property of the selected document:

   – If no value is available, widget will display the website home page.

   – Note that the resolution of repeating attributes is similar to one of D2

- Here is a use case of dynamic URL using document properties. Many combinations are

  possible according to user's needs.

GOLOKA SOFTWARE
conscious value

D2 External Widget

- Google Gadgets such as maps, weather forecast can be added to D2 portal.

- To add a map gadget:

    - Install and configure a Gadget Server (see product documentation)

    - Enter this server URL in Widget View options Widget View menu > Options

    ---
    Options
    Gadget server url : http://d66-02:9191/shindig

- Add in the following field, the URL of Gadget server

    Widget url : * ┍ $GADGET_SERVER/gadgets/ifr?url=$GADGET_SERVER/s

    Use $value to have dynamic URL.
    $GADGET_SERVER is a placeholder for the URL
    configured into X3 options.

- You have the ability to use $GADGET_SERVER placeholder and also, others D2 wildcards.

- With this alias, you can make dynamic the URL of gadget server set in Options and thus facilitate its resolution in D2 User Interface.

GOLOKA SOFTWARE
conscious value

1

D2 Internal Widgets of Browsing

Widgets	Description
BrowserWidget	Browse repository content/ Content tree widget access the repository (Cabinet, Folder, Document) *Similar to D2 3.1 → Repository Browser*
DocListWidget	Display content of a folder/cabinet and Search Results *Similar to D2 3.1 → Details View*
DocGalleryWidget	Display with thumbnails content of a folder/cabinet Search Results *Similar to D2 3.1 → Thumbnails View*
ThumbnailsWidget	Preview document content using thumbnails and slideshow *Similar to D2 3.1 → Preview mode*
FavoritesWidget	Displays repository document(s) marked as Favorites *Similar to D2 3.1 → Favorites node*
CheckoutDocumentWidget	Displays check-out and edited files by current user *Similar to D2 3.1 → Checkout node*
VirtualDoc Widget	Display VD structure

GOLOKA SOFTWARE
conscious value

D2 Internal Widgets for Data

Widgets	Description
PropertiesWidget	Displays properties page of the selected document [Read only widget]
DetailsRenditionsWidget	Displays rendition(s) attached to the selectet file *Similar to D2 3.1 → Details Rendition*
DetailsLocationsWidget	Displays location(s) of a document in the repository *Similar to D2 3.1 → Details Location*
DetailsRelationsWidget	Displays linked files of selected document *Similar to D2 3.1 → Details Location*
DetailsAuditWidget	Lists all events related to selected document *Similar to D2 3.1 → Details Audit*
DetailsVersionsWidget	Shows all versions of the selected document *Similar to D2 3.1 → Details Versions*
DumpWidget	Diplays the Dump of the selected document

GOLOKA SOFTWARE
conscious value

D2 Internal Widgets for Product/Plugin

Widgets	Description
CenterStageWidget	Enables browsing of CenterStage spaces
CenterstageCommentsWidgets	Displays comments added to content selected in the CenterStage browser widget
DetailsRetentionWidget	Shows retention policies applied to the selected document *Similar to D2 3.1 → Details Retention*
DetailsMarkupWidget	Shows retention mark-up applied to the selected document *Similar to D2 3.1 → Details Mark-up*

GOLOKA SOFTWARE
conscious value

D2 Internal Widgets for Search

Widgets	Description
QuickSearchWidget	Performs search in the current workspace linked to repository *Similar to D2 3.1 Quick Search*
SearchWidget	Performs search saved by an administrator or by an user with D2 3.1 *Similar to D2 3.1 Search node*

GOLOKA SOFTWARE
conscious value

D2 Internal Widgets for Workflow

Widgets	Description
TasksWidget	Lists all currents tasks of the user
TasksAttachmentWidget	Displays attachments related to the document of workflow
TasksDetailsWidget	Describes workflow task (read only widget)
TasksFoldersWidget	Displays tree of tasks inbox
TasksNotesWidget	Displays the notes related to the document of workflow
TasksPerformersWidget	Displays all performers of the selected task

GOLOKA SOFTWARE
conscious value

D2 Widgets Communication Channel

General events			
Search User	Not used	**Show VD**	Request the display of VD with « Display » context menu
Search document	Informs that a search is in progress with QuickSearch or predefined Search widgets	**Show Folder**	Folders and cabinets selection
Show document	Informs that a document has been selected Request a document display	**Dump**	Request the display of a document DUMP
Refresh document	Request the refres of a document when a modification is done (properties, content...)	Pubsub Logs	Not used
Locate	Request document, cabinet or folder location	Copy Paste	Not used
Locate task	Request Task Location	Change URL	For External Widget Not used
Locate search	Request Search Location	**Show Dialog**	Informs that a dialog box will appear Request the display of dialog box (warning, properties...)

GOLOKA SOFTWARE
conscious value

D2 Widgets Communication Channel

General events			
Action Dialog	Not used	**Select objects**	Informs of content multiselection
Destroyed ID	Informs that object id has been destroyed	**Checkout state changed**	Informs that checkout state of document has changed
Created parent ID	End of creation/import process for object location	**Refresh favorites**	Informs that objects favorites have changed (added, removed) Request a Favorites Refresh
Change Filter	Informs that sidebar filter has been changed	**Focus widget**	Informs where current focus is located
Change preference	Informs that user preferences has been edited	**Reload preference**	Request a preferences reloading in the current workspace. For example, when a date format is edited in Widget View options.
Execute simple action	Not used		

GOLOKA SOFTWARE
conscious value

D2 Widgets Communication Channel

Tasks events	
Show task	Request a task display Informs that a task has been selected
Show task folder	Request the display of a task folder Informs that a task folder has been selected
Show task note	Request the display of a task note Informs that a task note has been selected
Task read state changed	Request a change of task state Informs that the state of a task has changed Read/ Unread
Task priority changed	« Change task priority » with context menu of tasks widget
Task processed	Request to perform an action on a user task: « Accept », « Reject », « Delegate », « Acquire » (tasks widget)

GOLOKA SOFTWARE
conscious value

D2 Widgets Communication Channel

Transfer events	
Download View ID	Request a document view with « Display » menu or double-click
Download Edit ID	Request a document edition with « Edit » menus
Download Checkout ID	Request a document checkout with « Checkout »menus
Download Print ID	Request a document print with « Print »menu
Export URL	Request a document(s) export with « Export » menus from widgets containing a list
Import File	Not used

GOLOKA SOFTWARE
conscious value

D2 Widgets Communication Channel

Portal events	
Reload Space	Requests a refresh of portal workspace
Disconnect	Not used
Fullscreen	Requests the fullscreen display of a widget by double click its tab
Session restore	Not used
Copy locator	Request the « Copy (of a document) link to clipboard » from context menu all widgets with a list
Widget initialize	Indicates the widget ready for an event reception (case of auto-locate with copied link)

GOLOKA SOFTWARE
conscious value

Create a Theme Configuration

- The theme color of the D2 user interface is customizable and allows to define the colors of background, logo, borders, and more.
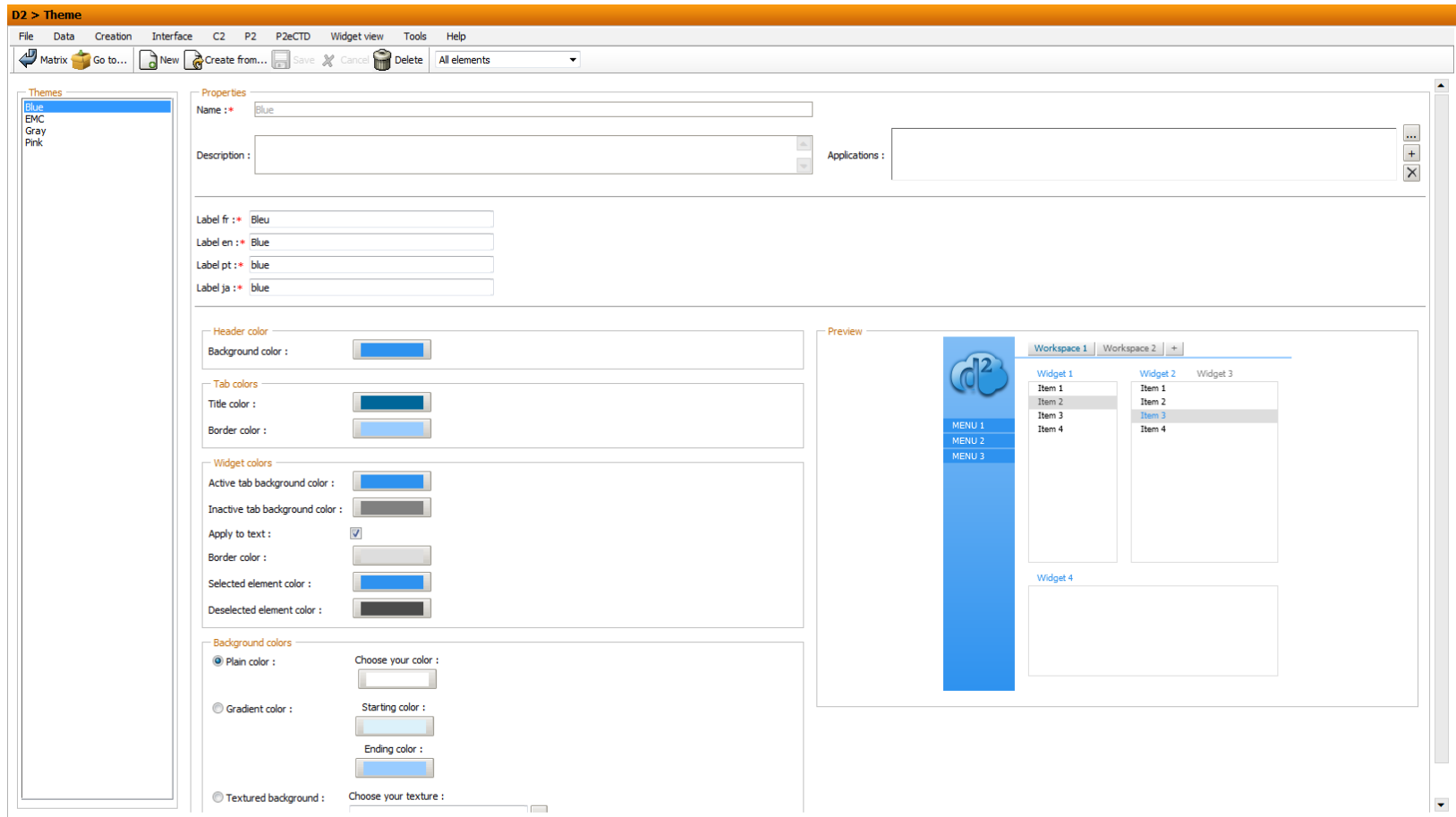
Create a Theme Configuration

- To create a new theme, access the module via the configuration matrix or Widget View menu.

- •Populate general properties of module: Name, Description, Applications

- Enter a label for each language of application. This last will be displayed in the theme gallery of user interface.

- Define the colors of the following elements:

  – Header (menu)

  – Tabs

  – Widgets

  – Backgrounds

GOLOKA SOFTWARE
conscious value

Create a Theme Configuration

- The header is the menu area which can be located at the top or on the left side of portal.

- Select a background color

- (This color will be used for the highlighting of steps during creation and import processes)

- Tab color allows to custom color of workspace area
  - Select the color of tab title
  - And then the one of the border

- With Widget colors field set choose the color of:
  - The background of current widget tab
  - And also the one of inactive tab (not selected)
  - When you check this box background color is applied on widget title
  - You can also define a color of widget border
  - The theme of the selection is also customizable for:
    - Selected element
    - Deselected element

GOLOKA SOFTWARE
conscious value

Create a Theme Configuration

- The header is the menu area which can be located at the top or on the left side of portal.

- Select a background color

- (This color will be used for the highlighting of steps during creation and import processes)

- Tab color allows to custom color of workspace area
  - Select the color of tab title
  - And then the one of the border

- With Widget colors field set choose the color of:
  - The background of current widget tab
  - And also the one of inactive tab (not selected)
  - When you check this box background color is applied on widget title
  - You can also define a color of widget border
  - The theme of the selection is also customizable for:
    - Selected element
    - Deselected element

Create a Theme Configuration

- The Background color field set allows to custom the background of a workspace.

- To do this, you can define three types of background:

    - With a plain color OR

    - With a gradient color OR

    - With a textured file

- For each background, you can apply a white background color on dialog boxes by ticked this option

- So, when this box is enabled, properties pages, creation/ import matrixes will be displayed in UI with a white background.

Create a Theme Configuration

- The preview window enables the general display of theme in User Interface.

- It is possible to display the set of colors of D2 UI such as fonts, borders, and

  backgrounds.

To Configure workspace Structure

- With this you will be able to import and configure browsing workspace of the user interface..

Workspace Design Structure

- Workspaces are "defined areas" which allow optimized browsing of the user interface and allow you to more easily manage workflow.

- These "browsing areas" are designed using an XML file, based on an XSD structure (provided with the release).

- To create a workspace module configuration, set up the XML defining the workspace structure.

- The XSD allows you to validate only the XML structure, which means it cannot be used to check the consistency of workspace structure display.

- For example, it does not control the presence of the data and the content node in the border layout container (see next chapter for more understanding).

GOLOKA SOFTWARE
conscious value

Workspace Design Structure

- Here are some workspaces samples and their reference schema (XML and XSD files):

  - SpaceSchema.xsd

  - SpaceSample01.xml

  - SpaceSample02.xml

  - SpaceSample03.xml

  - SpaceSample04.xml

GOLOKA SOFTWARE
conscious value

General Design of a Structure

- The XML workspace structure file must contain the following object:

```xml
<?xml version="1.0" encoding="UTF-8"?>
- <root xsi:noNamespaceSchemaLocation="SpaceSchema.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    - <space>
        + <border-layout-container>
      </space>
  </root>
```

- There must be only one <root> tag at the beginning of the file.

- The <root> tag must contain:

  - One <space> tag allowing to add the following containers:

  - One <border-layout-container> is included in this <space> tag. It can be

    compounded by the following containers:

    - Border layout container

    - Tab container

    - Accordion container

    - Vertical and horizontal containers

General Design of a Structure

- Each of these containers may contain itself others containers or widgets.

- (Example: Border layout can contain in one of its area a Tab container, the Tab container itself containing 2 widgets, i.e. 2 tabs)

- The following list contains the containers and for each and possible sub components:

  – **Border layout container: any containers and/or widgets**

  – **Tab container: widgets only**

  – **Accordion container: widgets only**

  – **Vertical & Horizontal containers: any containers and/or widgets**

- More details about the composition of theses containers are explained in the following slides.

- **Note that all these "tags" elements could be named "node" to define the XML structure of a workspace.**

GOLOKA SOFTWARE
conscious value

Workspace: Component Locations

- **"Border layout container"** is the main frame of a workspace.

- It allows to add component such as "container" and/or "widget" and defines the location in the frame.

- To define the content location of a sub component, you can use the following region values:

  - North : Top of the container

  - South : Bottom of the container

  - East : Right side of container

  - West : Left side of container

  - Center : middle of container

- For each region, you can enable or disable region resize. You can also define or not maximal and minimal size when region resize is enabled.

GOLOKA SOFTWARE
conscious value

Preview: Component Locations

GOLOKA SOFTWARE
conscious value

Workspace: Border Layout Container

This "Border layout" node must contain the following tags/nodes:

- **"Data" node:**

  – This node is only used for this type of container. It allows to define location and size of each container elements.

  – **Available attribute for location:**

    - **layoutregion** followed by a location value: **N,S,E,W** or **C**

  – **Available attributes for size:**

    They allow to define and/or limit the size for the container

    - **size** is used to defined the container default size. Two kind of size are possible and automatically detected:

      – If value > 0 : absolute size in pixel. [100 for West = 100px large]

      – If value < 0 : relative size in %. [0,5 for West => 0,5% i.e. half of the window]

    - **maxSize** and **minSize** followed by a numeric value. [see above]

    - **split** followed by TRUE or FALSE, respectively enabled or disabled resizing When split is TRUE, **minSize/maxSize** attributes have to be defined.

GOLOKA SOFTWARE
conscious value

Workspace: Border Layout Container

"Content" node

- The number of "content" nodes must match the number of "data" nodes.

- This node allows to define in <widget config> tag the elements which will be used in the container: widget or container

- If the element is a widget, you must specify the name of the widget module, from the configuration

- If the element is a container, the name of the container must be specified in this tag.

- Note that the number of "content" elements is limited to 5 for display reasons.

```
- <border-layout-container>
    - <data>
         <border-layout-data split="true" layoutregion="CENTER"/>
         <border-layout-data split="true" layoutregion="EAST" maxSize="500" minSize="150" size="480"/>
         <border-layout-data split="true" layoutregion="WEST" maxSize="500" minSize="150" size="260"/>
      </data>
    - <content>
        - <tab-container>
            - <content>
                 <widget config="doclist"/>
                 <widget config="docgallery"/>
              </content>
          </tab-container>
        + <border-layout-container>
          <widget config="browser"/>
      </content>
  </border-layout-container>
```

Space 01: Border Layout Container

An example of a workspace structure containing a border layout (Sample01)

```xml
<?xml version="1.0" encoding="UTF-8"?>
<root xsi:noNamespaceSchemaLocation="SpaceSchema.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <space>
    <border-layout-container>
      <data>
        <border-layout-data split="true" layoutregion="CENTER"/>
        <border-layout-data split="true" layoutregion="EAST" maxSize="500" minSize="150" size="480"/>
        <border-layout-data split="true" layoutregion="WEST" maxSize="500" minSize="150" size="260"/>
      </data>
      <content>
        <tab-container>
          <content>
            <widget config="doclist"/>
            <widget config="docgallery"/>
          </content>
        </tab-container>
        <border-layout-container>
          <data>
            <border-layout-data split="false" layoutregion="NORTH" maxSize="100" minSize="100" size="100"/>
            <border-layout-data split="false" layoutregion="CENTER"/>
          </data>
          <content>
            <widget config="quicksearch"/>
            <accordion-container>
              <content>
                <widget config="locations"/>
                <widget config="versions"/>
                <widget config="renditions"/>
                <widget config="relations"/>
                <widget config="audits"/>
              </content>
            </accordion-container>
          </content>
        </border-layout-container>
        <widget config="browser"/>
      </content>
    </border-layout-container>
  </space>
```

GOLOKA SOFTWARE
conscious value

Space 02: Border Layout Container

Workspace: Tab Container

- This layout is under the form of an accordion layout, it is a tab layout displayed vertically.

- **"Content" node**

    - One and one only "Content" node for the accordion layout must be defined

    - To add widgets in this layout enter the name of the widget configuration in <widget Config>

    - The number of widgets is unlimited. It is possible to add as many widgets as needed

    - No size constraint has to be specified for this container. The size will be constrained directly by its parent container.

```
- <tab-container>
    - <content>
          <widget config="doclist"/>
          <widget config="docgallery"/>
      </content>
  </tab-container>
```

GOLOKA SOFTWARE
conscious value

Space 02: Tab Container

- Preview of a workspace structure with tabs (Sample02)

Workspace: Accordion Container

- This layout is under the form of an accordion layout, it is a tab layout displayed vertically.

- **"Content" node**

  - One and one only "Content" node for the accordion layout must be defined

  - To add widgets in this layout enter the name of the widget configuration in <widget Config>

  - The number of widgets is unlimited. It is possible to add as many widgets as needed

  - No size constraint has to be specified for this container. The size will be constrained directly by its parent container.

```
- <accordion-container>
    - <content>
          <widget config="locations"/>
          <widget config="versions"/>
          <widget config="renditions"/>
          <widget config="relations"/>
          <widget config="audits"/>
      </content>
  </accordion-container>
</content>
```

GOLOKA SOFTWARE
conscious value

Space 03: Accordion Container

- An example of a workspace structure with an accordion (Sample03)

```xml
<?xml version="1.0" encoding="UTF-8"?>
<root xsi:noNamespaceSchemaLocation="SpaceSchema.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <space skin="Red" label="Sample space #1">
        <border-layout-container>
            <data>
                <border-layout-data split="true" layoutregion="CENTER"/>
                <border-layout-data split="true" layoutregion="EAST" maxSize="500" minSize="150" size="480"/>
                <border-layout-data split="true" layoutregion="WEST" maxSize="500" minSize="150" size="260"/>
            </data>
            <content>
                <tab-container>
                    <content>
                        <widget config="doclist"/>
                        <widget config="docgallery"/>
                    </content>
                </tab-container>
                <accordion-container>
                    <content>
                        <widget config="locations"/>
                        <widget config="versions"/>
                        <widget config="renditions"/>
                        <widget config="relations"/>
                        <widget config="audits"/>
                    </content>
                </accordion-container>
                <widget config="browser"/>
            </content>
        </border-layout-container>
    </space>
</root>
```

GOLOKA SOFTWARE
conscious value

Space 03: Accordion Container

- Preview of an accordion container (Sample03)

Workspace: Horizontal Container

- This container is for widgets or any other containers. It spreads elements horizontally and equally.

- The rendered display is inverted to the content structure, i.e. an horizontal layout will display its content vertically.

- **"Content" node**

  - Resizing is disabled.

  - To add a widget in an horizontal layout enter the name on the configuration name in <widget config>

```
- <horizontal-container>
   - <content>
        <widget config="browser"/>
        <widget config="doclist"/>
     </content>
  </horizontal-container>
```

```
- <horizontal-container>
   - <content>
        + <vertical-container>
        + <border-layout-container>
     </content>
  </horizontal-container>
```

  - To add a container enter the name of the container between <>

GOLOKA SOFTWARE
conscious value

Space 04: Horizontal Container

- An example of a workspace structure with horizontal containers (Sample04)

```xml
<?xml version="1.0" encoding="UTF-8"?>
<root xsi:noNamespaceSchemaLocation="SpaceSchema.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <space>
    <border-layout-container>
      <data>
        <border-layout-data split="true" layoutregion="CENTER"/>
      </data>
      <content>
        <horizontal-container>
          <content>
            + <vertical-container>
            <border-layout-container>
              <data>
                <border-layout-data split="true" layoutregion="CENTER"/>
                <border-layout-data split="true" layoutregion="SOUTH" size="0.5" maxSize="500" minSize="50"/>
              </data>
              <content>
                <widget config="preview"/>
                <horizontal-container>
                  <content>
                    <vertical-container>
                      <content>
                        <widget config="taskfolders"/>
                        <widget config="tasks"/>
                      </content>
                    </vertical-container>
                    <tab-container>
                      <content>
                        <widget config="taskattachment"/>
                        <widget config="tasknotes"/>
                        <widget config="taskperformers"/>
                        <widget config="taskdetails"/>
                      </content>
                    </tab-container>
                  </content>
                </horizontal-container>
              </content>
            </border-layout-container>
          </content>
        </horizontal-container>
      </content>
    </border-layout-container>
  </space>
</root>
```

GOLOKA SOFTWARE
conscious value

Space 04: Horizontal Container Preview

- Multiple previews of horizontal containers (Sample04)

Workspace: Vertical Container

- This container is for widgets or any other containers. It spreads elements vertically and equally.

- The rendered display is inverted to the content structure, i.e. an vertical layout will display its content horizontally.

- **"Content" node**

  - Resizing is disabled.

  - To add a widget in an horizontal layout enter the name on the configuration name in <widget config>

```
- <vertical-container>
   - <content>
        <widget config="taskfolders"/>
        <widget config="tasks"/>
     </content>
  </vertical-container>
```

```
- <vertical-container>
   - <content>
        + <horizontal-container>
        + <accordion-container>
        + <horizontal-container>
     </content>
  </vertical-container>
```

  - To add a container enter the name of the container between <>

GOLOKA SOFTWARE
conscious value

Space 04: Vertical Container

- An example of a workspace structure with vertical container (Sample04)

```xml
<?xml version="1.0" encoding="UTF-8"?>
<root xsi:noNamespaceSchemaLocation="SpaceSchema.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <space>
    <border-layout-container>
      <data>
        <border-layout-data split="true" layoutregion="CENTER"/>
      </data>
      <content>
        <horizontal-container>
          <content>
            <vertical-container>
              <content>
                <horizontal-container>
                  <content>
                    <widget config="browser"/>
                    <widget config="doclist"/>
                  </content>
                </horizontal-container>
                <accordion-container>
                  <content>
                    <widget config="properties"/>
                    <widget config="favorites"/>
                    <widget config="search"/>
                  </content>
                </accordion-container>
                <horizontal-container>
                  <content>
                    <widget config="locations"/>
                    <tab-container>
                      <content>
                        <widget config="versions"/>
                        <widget config="renditions"/>
                        <widget config="relations"/>
                        <widget config="audits"/>
                      </content>
                    </tab-container>
                  </content>
                </horizontal-container>
              </content>
            </vertical-container>
            <border-layout-container>
          </content>
        </horizontal-container>
      </content>
    </border-layout-container>
  </space>
</root>
```

Space 04: Vertical Container Preview

- An example of a workspace structure with vertical container (Sample04)

Workspace: To Configure a Module

- Import the XML file of the workspace structure. Make sure that it contains all required nodes defined previously.

- To display properly in the user interface, it has to correspond with the rules of XSD file.

- To do so, click the following import button:

- Once imported a preview of XML file is available by clicking on « View »

- A picture preview can be added to ongoing space. This preview will appear in the space gallery of user.

- The preview file has to respect the following constraints:

  - Size: 200*150

  - Format: JPEG or PNG

Workspace: To Configure a Module

- You can bind a default theme to this workspace. It will be applied when the workspace is loaded into the user gallery.

- This item is to be chosen among existing theme configurations.

- Select a theme module in the combo list below.

Default skin :   Blue ▼

- If no configuration is defined or if user is not allowed to display the selected configuration, a default theme will be applied at the time of workspace selection into user workspace gallery.

- This default theme is defined in the style sheets of the application.

- When the configuration of workspace is done, save it and associate it with a user's context through D2 configuration matrix.

- The workspace will be available in the gallery of each user.

D2 – General Design of a Structure

GOLOKA SOFTWARE
conscious value

D2 Basic Configuring for Content

GOLOKA SOFTWARE
conscious value

D2 – Additional Content Creation

D2 – Configuration for Document

GOLOKA SOFTWARE
conscious value

Module Topics

✓ Check-in

✓ Checkout

✓ Audit

✓ Renditions

✓ Relations

✓ Subscriptions

GOLOKA SOFTWARE
conscious value

CheckIn

- You can configure several settings of check-in that you will affect to context

- The configuration screen for check-in is the following:

To create a new Checkin configuration

- Click and enter its name and description

Properties	
Name : *	New checkin
Description :	
Silent Checkin (in minor version) : ☐	
Silent Checkin (in same version) : ☐	

- Check these boxes for a silent Checkin of minor or identical versions. The Checkin will be done automatically in background

Allow major versions : ☐	Check this box to authorize checkin in major version
Display log entry : ☐	Check this box to use checkin description. Display the property « log entry » to fill it
Require log entry : ☐	Check this box to make the checkin description mandatory
Allow checkin from file : ☐	Check this box to authorize the checkin from file
Request new rendition : ☐	
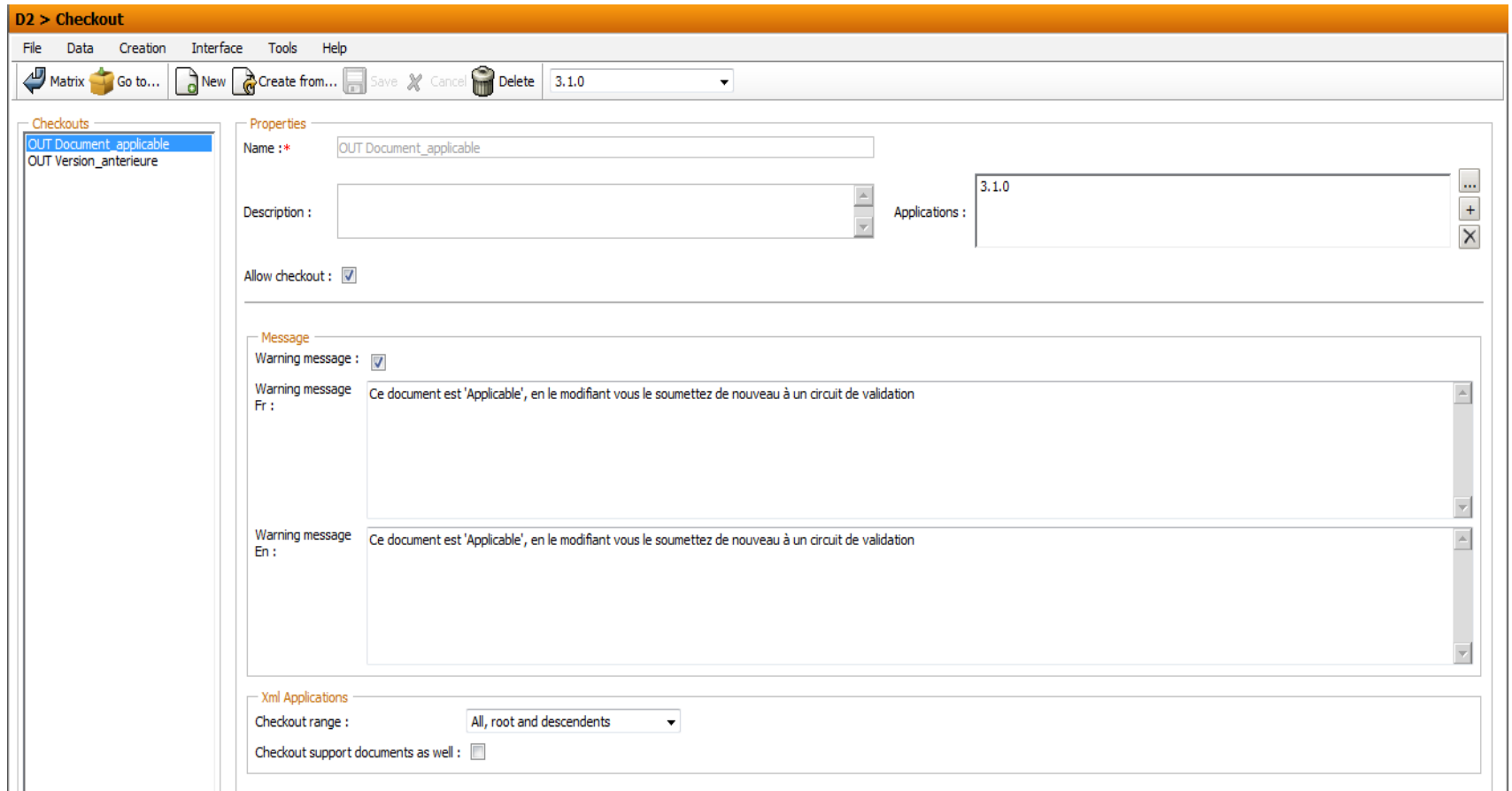
- Check this box to request a new rendition

GOLOKA SOFTWARE
conscious value

1

Checkout

- You can configure several checkout settings that you will apply to different context

- The configuration screen for checkout is the following:

To create a new Checkout configuration

- Click [icon] and enter its name and description

Properties
Name :* OUT Alerte Approuvés VD
Description :
Allow checkout : ☑

- Check this box if you want to authorize content checkout
- Check this box if you want to put a message before the checkout

Warning message : ☑

Warning message Fr : **Attention**, ce document est **approuvé.** Créer une version de ce document risque de générer une incohérence s'il est actuellement utilisé dans des documents virtuels. Voulez vous quand même continuer ?

- Enter the message :
  - In French
  - In English

Warning message En : **Warning**, this document is **approved.** Creating a new version of this document could generate an inconsistency if it is used in some virtual documents. Would you like to continue ?

- Click [icon] to save

Audit

- You can configure the audit events
- Click ![icon] and enter the name of the new audit configuration and its description
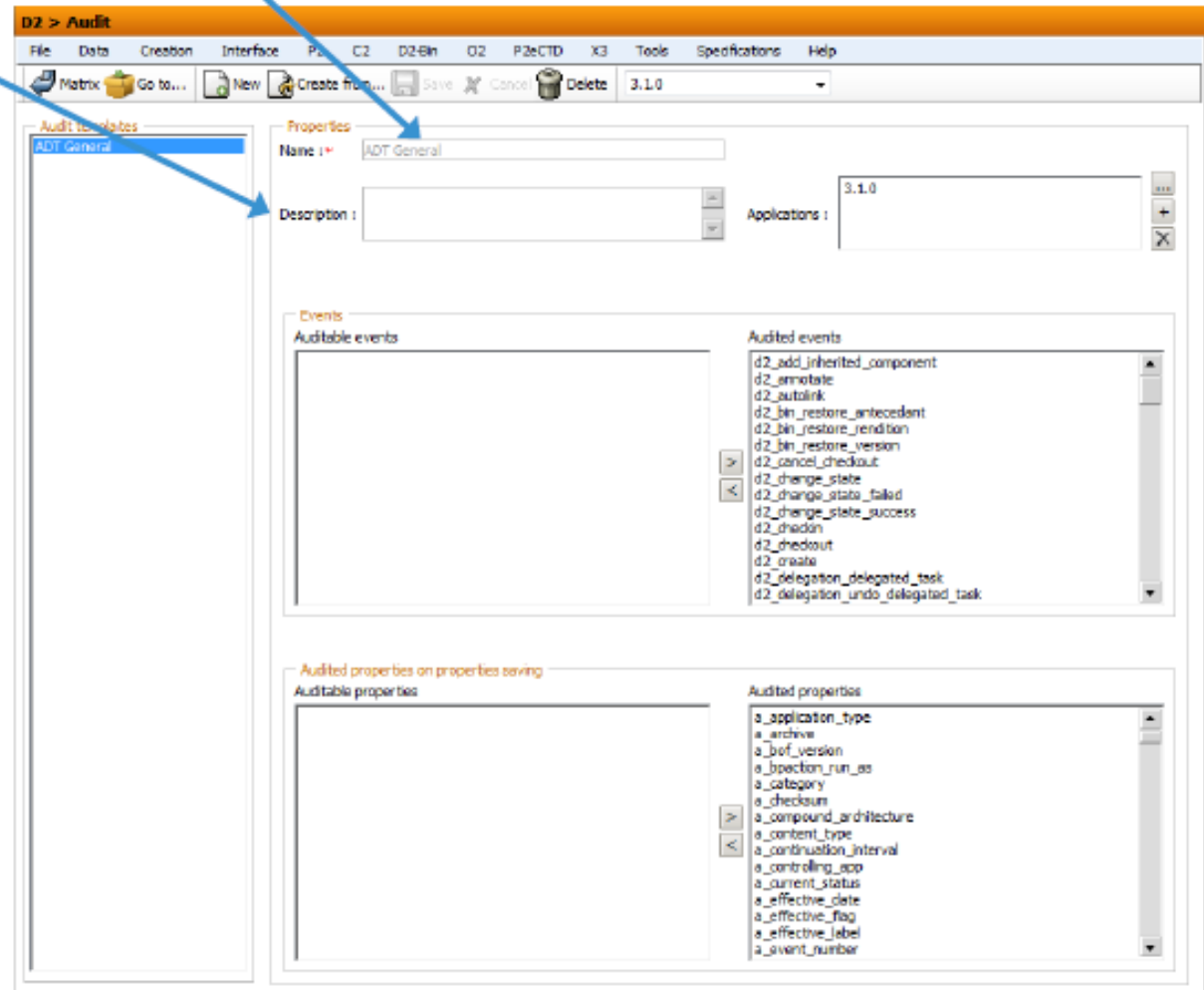
Audit

- Select an event to audit in the list
- Click « › » to add it in the list of events to be audited
- You can add several
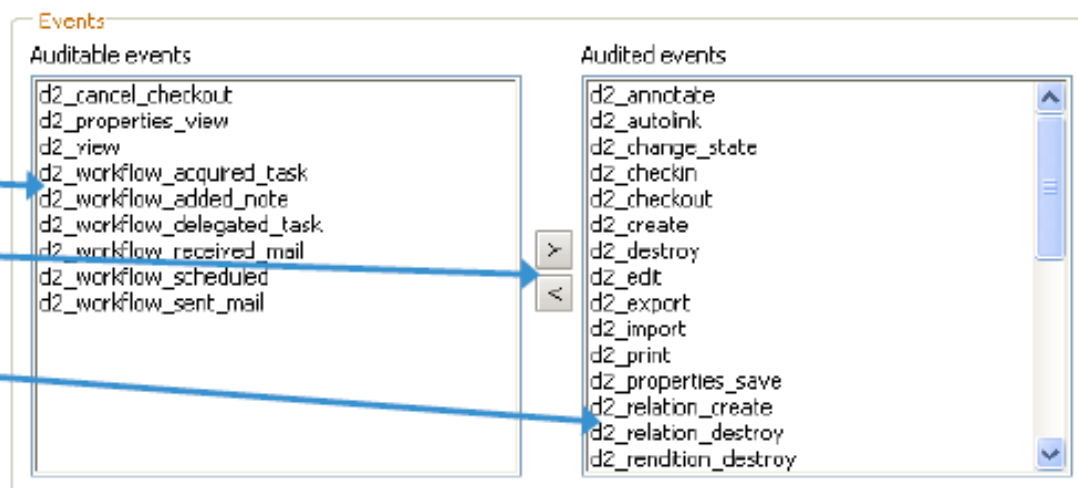
- Select a property to be audited in the list
- Click « › » to add it in the list to be audited
- Click [Enregistrer] to save

GOLOKA SOFTWARE
conscious value
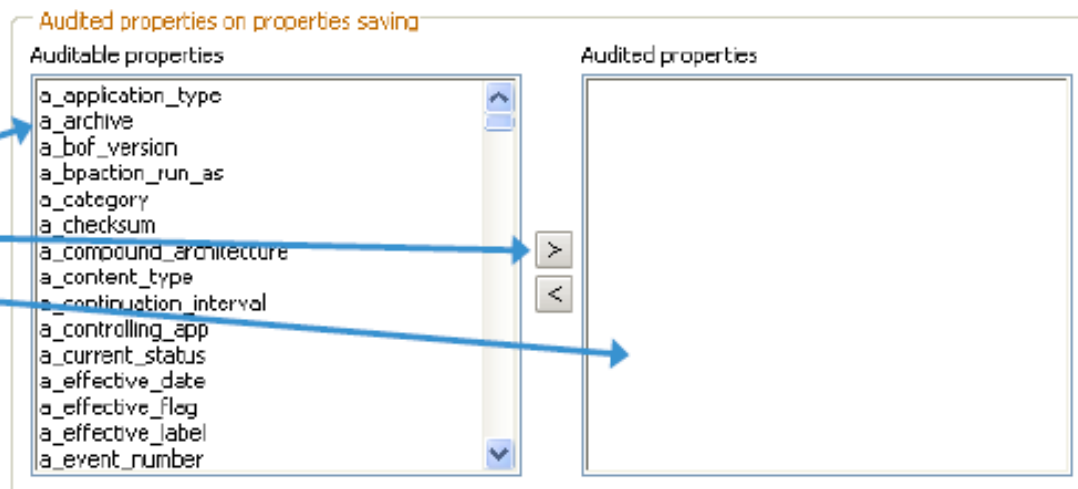
Remove the Audit Event

- You can also audit the removal of some content types

- Select types to be audited in the list and click « › » to add them in the list

- To audit the connection, check the box
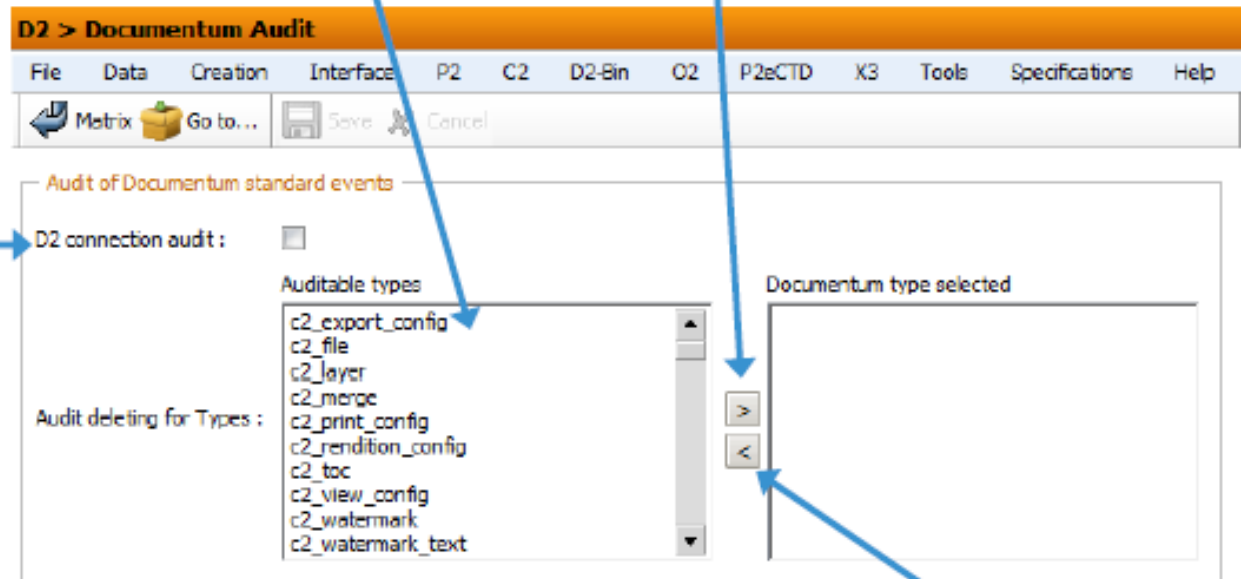
- To remove one, click it in the right hand side list and then on « ‹ »

GOLOKA SOFTWARE
conscious value

Rendition

- You can configure several rendition servers that you will apply to different context

- The configuration screen of rendition servers is as following:

To create a new Rendition Server

- Click 📄 and enter its name and description

Properties

Name : *	New server
Description :	
Queue name : *	dm_autorender_win31 ▾

- Select the desired queue for the server

Priority :	1 ▾	Select priority
Event :	rendition	Select event type
Message :	rendition_req_ps_pdf	Select message (ex: PDF rendition)
Don't overwrite the rendition of a document :	☐	

- Check this box if you do not want to overwrite the rendition of a document that has already one

GOLOKA SOFTWARE
conscious value

To create an ADTS rendition server

- An ADTS rendition server must be configured to use the thumbnail view mode

- Select the queue: dm_mediaserver

- And fill up the event with: dm_register_asset
- Do not add a message.

GOLOKA SOFTWARE
conscious value

To create an ADTS rendition server

- An ADTS rendition server must be configured to use the thumbnail view mode

- Select the queue: dm_mediaserver

Properties
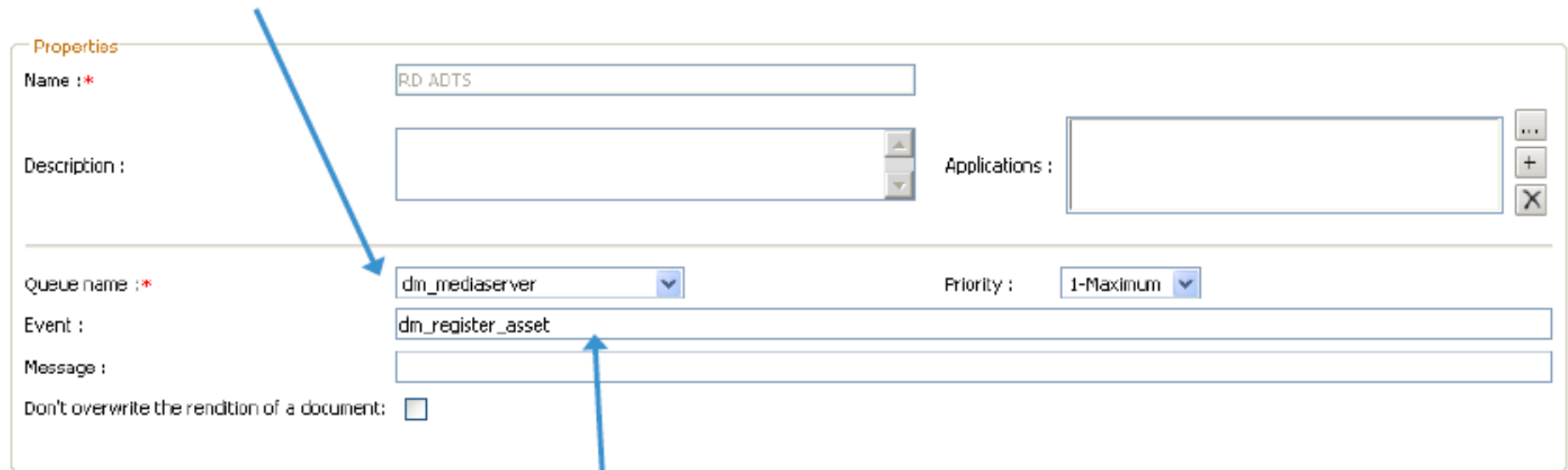
Name :*	R.D ADTS
Description :	
Applications :	
Queue name :*	dm_mediaserver	Priority :	1-Maximum
Event :	dm_register_asset
Message :	
Don't overwrite the rendition of a document:	☐

- And fill up the event with: dm_register_asset
- Do not add a message.

GOLOKA SOFTWARE
conscious value

Relations

The way in which the relations follow the various versions of linked documents is controlled on two levels:

The information « Permanent link» indicate the value of the property « permanent_link » of type of relation, such as it was created in the repository.

« Yes » means that each new version of the parent document of the relation involves the creation of a new relation, from the new version, towards the child document.

The combo box «Child version» allows you to set up the behaviour of the relation in case of a new version of the child document :

- « All versions » : each version of the child document will be linked to the parent document
- « Current » : only the current version of the child document will be linked
- « Unique version » : only the child document version used during the creation of the relation will be linked, the previous versions or the latest ones will not be linked
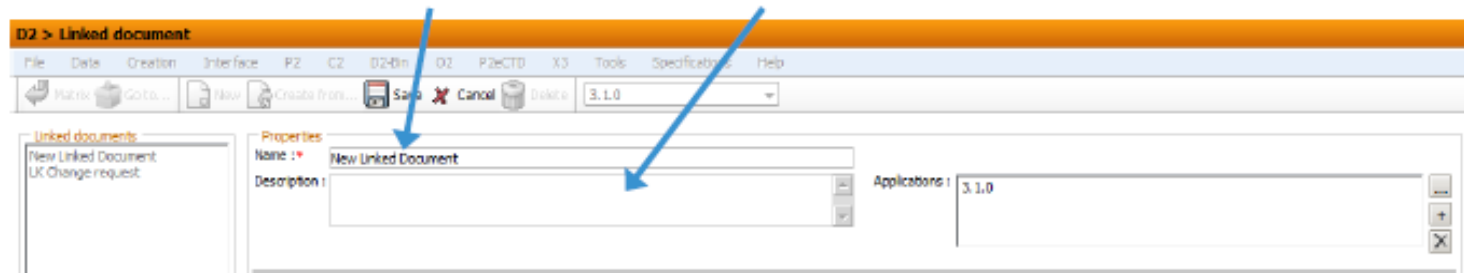
GOLOKA SOFTWARE
conscious value

1

Relations

- In addition to the parameter setting carried out via "Permanent link" and "Child version", the management of the versions is facilitated by two display filters available into D2-Client :

  - In the case of a parent document having a relation towards multiple versions of a child document (Child version = « All versions »), only one relation will appear on the tab « Relations » of the window « Details », during the selection of the parent, so as to not charge the display and disturb the user

  - Conversely, in the case of a child document having several relations towards several versions of a parent document (Permanent link = « Yes »), only one relation will be displayed during the child selection

  - In both cases, document manipulation in the mode « Display all versions » will makes it possible to check that all versions of the content are really linked as the setting specifies it

- Once the setting of the relations done, click on ⬚ to save or on ⬚ to cancel ongoing modifications since the last save

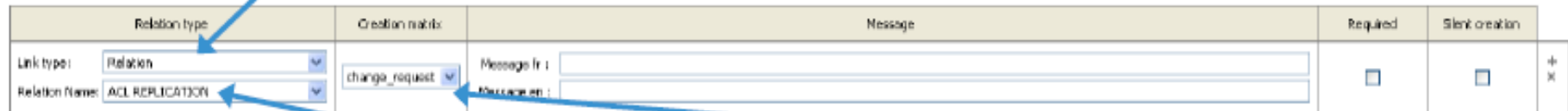**GOLOKA SOFTWARE**
conscious value

Linked Documents

- Linked documents make it possible to create one or several other documents during the creation process, and to link them to the created one

- The new documents will be created according to the settings of the creation matrix

- Click and enter the name and the description of the module

- Select the link type to use: *Relation, VD or Relation and VD*

- If the link is a relation decide the one to apply and the corresponding creation matrix that defines the document to be created

- Enter the message that will appear before creating the document

- To make the creation of the document mandatory, check the box
  To add another document to the list, click the button « + »

GOLOKA SOFTWARE
conscious value

Subscription

- D2 makes it possible to subscribe to a document or a topic (context) to be notified of events.

- To use these two functions, you must create a new subscription, click on the icon in the configuration matrix

- This configuration could be associated to documents or users context.
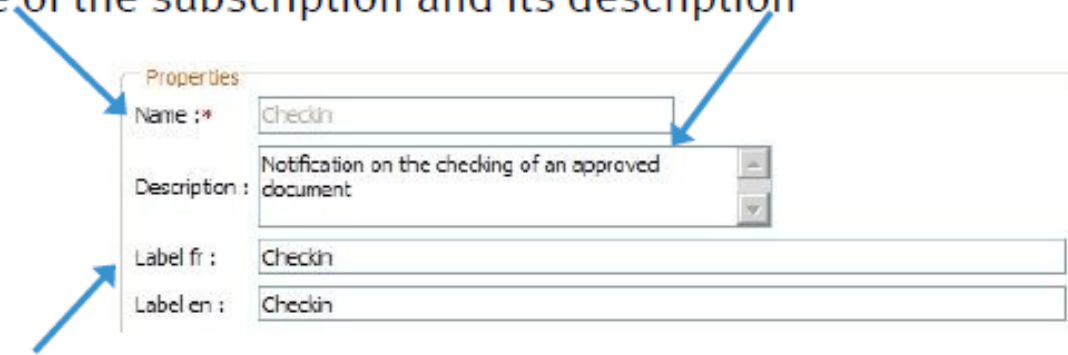
To Configure a Subscription

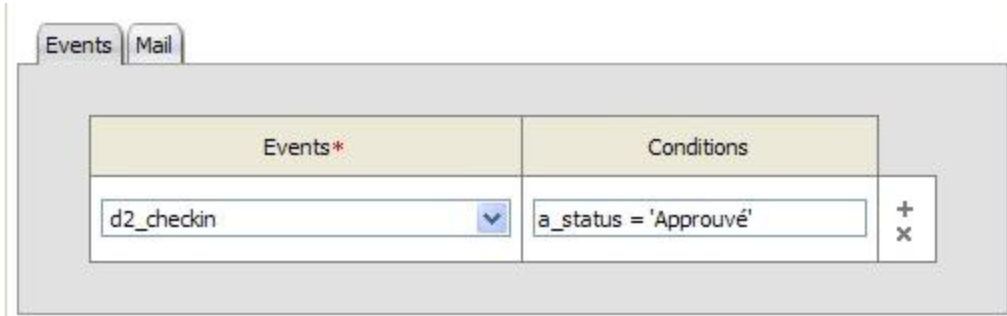- Enter the name of the subscription and its description

- Enter the label that will appear in the subscription selection list
- You can differ events notifications to group mails sending to all subscribers.

- So, users will not be notified anymore about each subscription event. Notification will be done later, for all events of a subscription configuration.

- The frequency of this notification has to be set up with D2JobSubscriptionSendMail job.

To Configure a Subscription

- Choose the event to audit in the list

- You can reduce the scope of the event to a context by using a DQL request

- You can add other events by clicking on « + »

- Or to remove one by clicking on « x »

To Configure a Subscription

- Click on Mail to define the parameters of the notification

- Check the box to join the document to the message

- You can also join a rendition Choose the format

- Enter the subject of the message

- Then add the text of the message

- To customize email formatting, use HTML content and jokers as specified in the following slide

To Configure a Subscription

- It could be useful for you, especially for differed notifications, to use **$foreachdoc{}** jokers in the mail content.

- Thanks to it, attributes values could be matched themselves

- To do so, others jokers as **$value()** must be associated to it

   **$foreachdoc{$value(title),$value(r_modifier)}**

- Then, check this configuration to the « Default » context to make this subscription available for everyone.

- You can also specify a context based on a type of document or on a group of users to reduce the scope of this subscription.

GOLOKA SOFTWARE
conscious value

1

To Backup a Configuration

- It is possible, at any time, to backup in the repository the ongoing configuration or an application. This backup includes the configuration itself but also the templates

- Select « Check in as new object » for the first backup (or to create a new configuration)

- Select an application or « All applications »
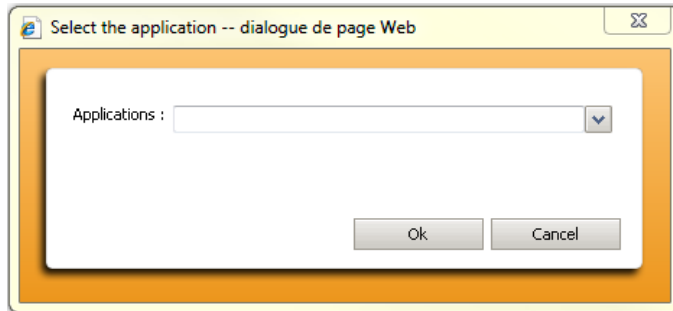
- Enter the name of the configuration

- Enter the description of the configuration

- Click « Ok ».

GOLOKA SOFTWARE
conscious value
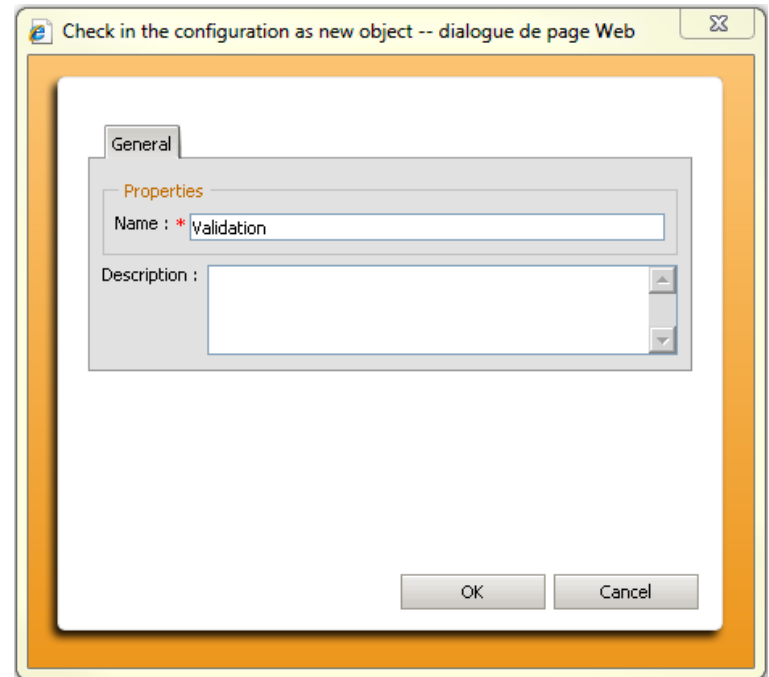
To Backup a Configuration

- To backup a new version of the ongoing configuration, click «Check in configuration in base »

- You can modify the name
- Select the version

- And a description
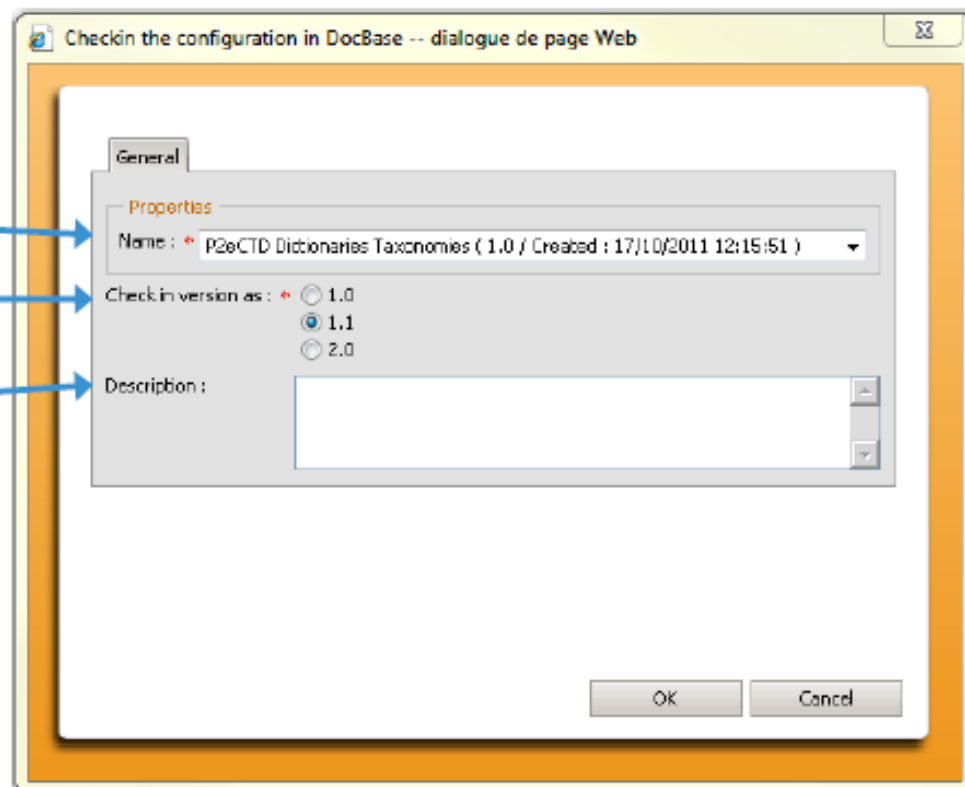
- Click « OK » to create a new version of the configuration

GOLOKA SOFTWARE
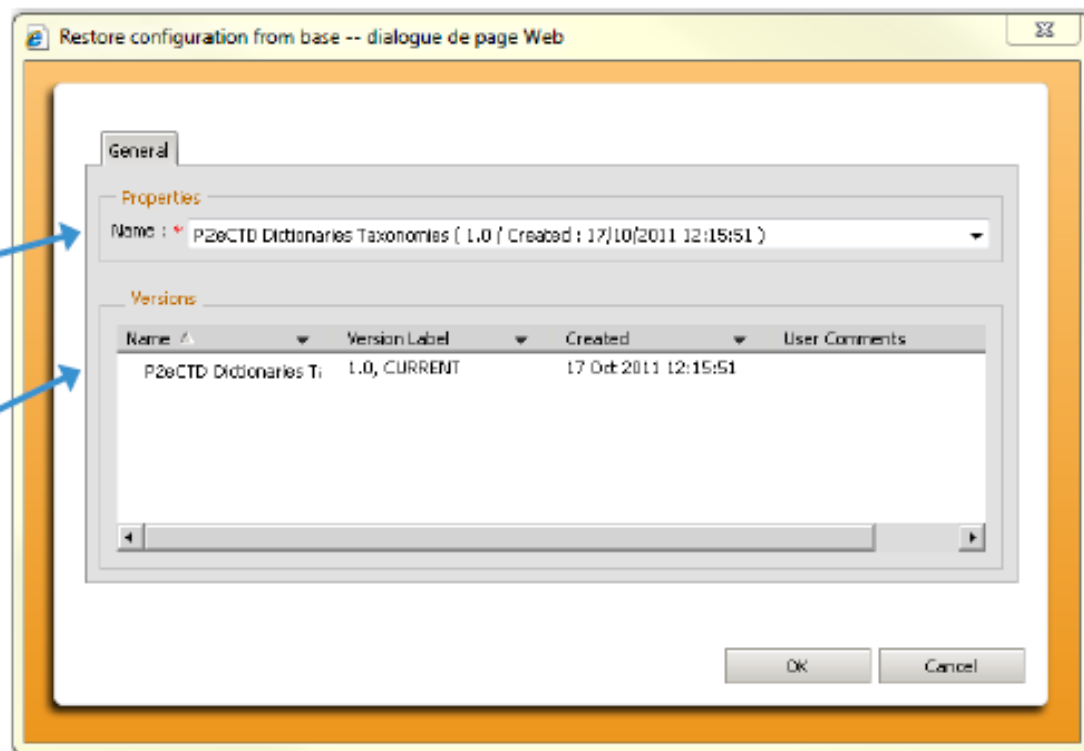conscious value

To restore a configuration

- To restore a configuration from the repository
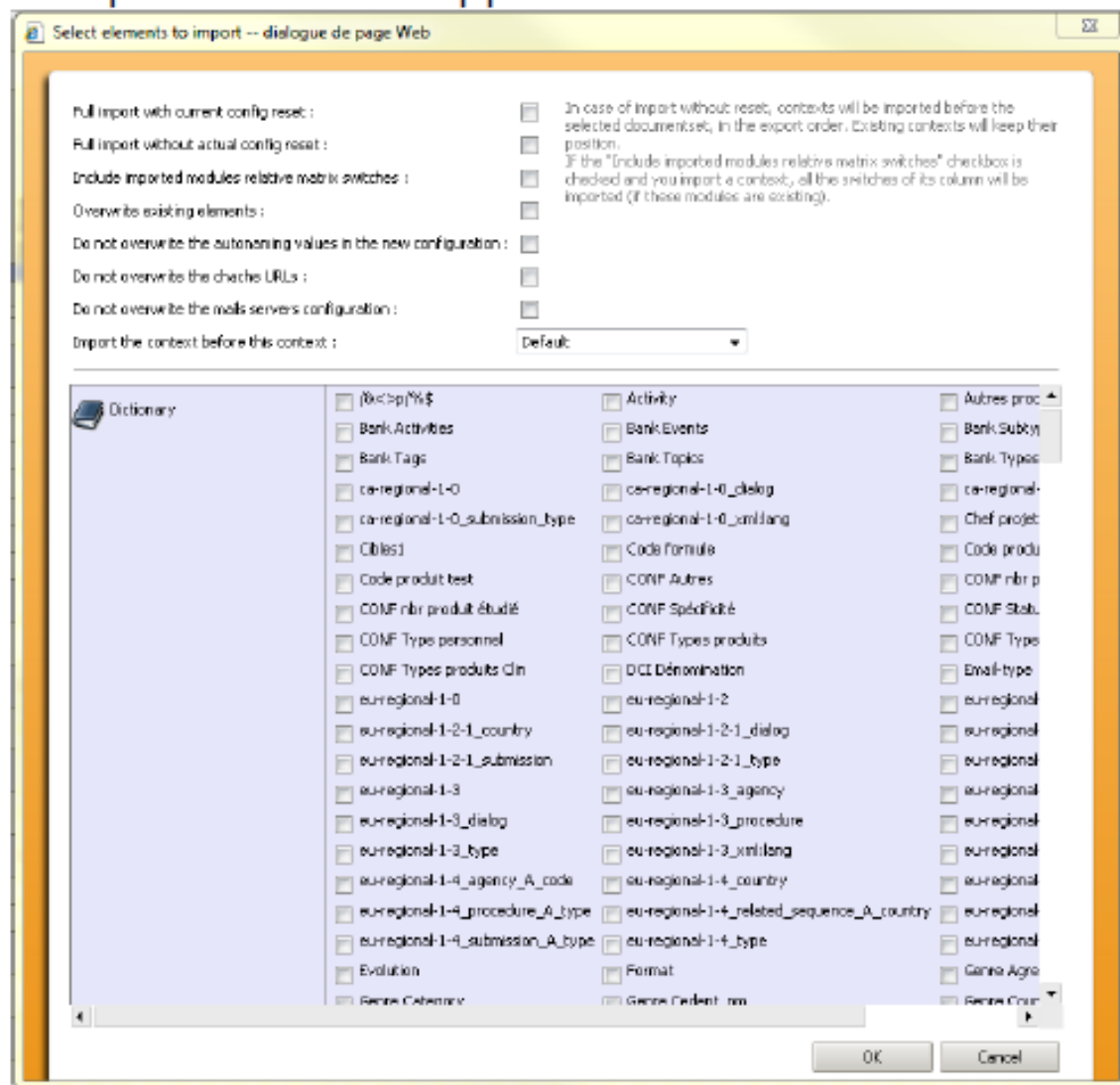

- Select a configuration

- Then the desired version

- Click « OK »

To restore a configuration

- The selective import screen will appear

To restore a configuration

- To import the entire configuration and erase the ongoing configuration, check the box

Full import with current config reset :

Full import without actual config reset :

Include imported modules relative matrix switches :

Overwrite existing elements :

Do not overwrite the autonaming values in the new configuration :

In case of import without reset, contexts will be imported before the selected documentset, in the export order. Existing contexts will keep their position.
If the 'Include imported modules relative matrix switches" checkbox is checked and you import a context, all the switches of its column will be imported (if these modules are existing).

- Check the box to import the entire configuration without erasing the ongoing configuration.

- If you want to import the checks of the configuration matrix, check the box

Include imported modules relative matrix switches :

Overwrite existing elements :

Do not overwrite the autonaming values in the new configuration :

Do not overwrite the chache URLs :

If the 'Include imported modules relative matrix switches" checkbox is checked and you import a context, all the switches of its column will be imported (if these modules are existing).

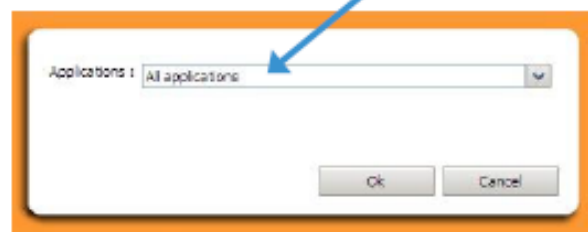- The   s of the column for the existing modules

To export a configuration

- It is possible, at any time, to export on the "file system"
  the ongoing configuration or an application.
  This export includes the configuration, or the application, itself but also the templates.

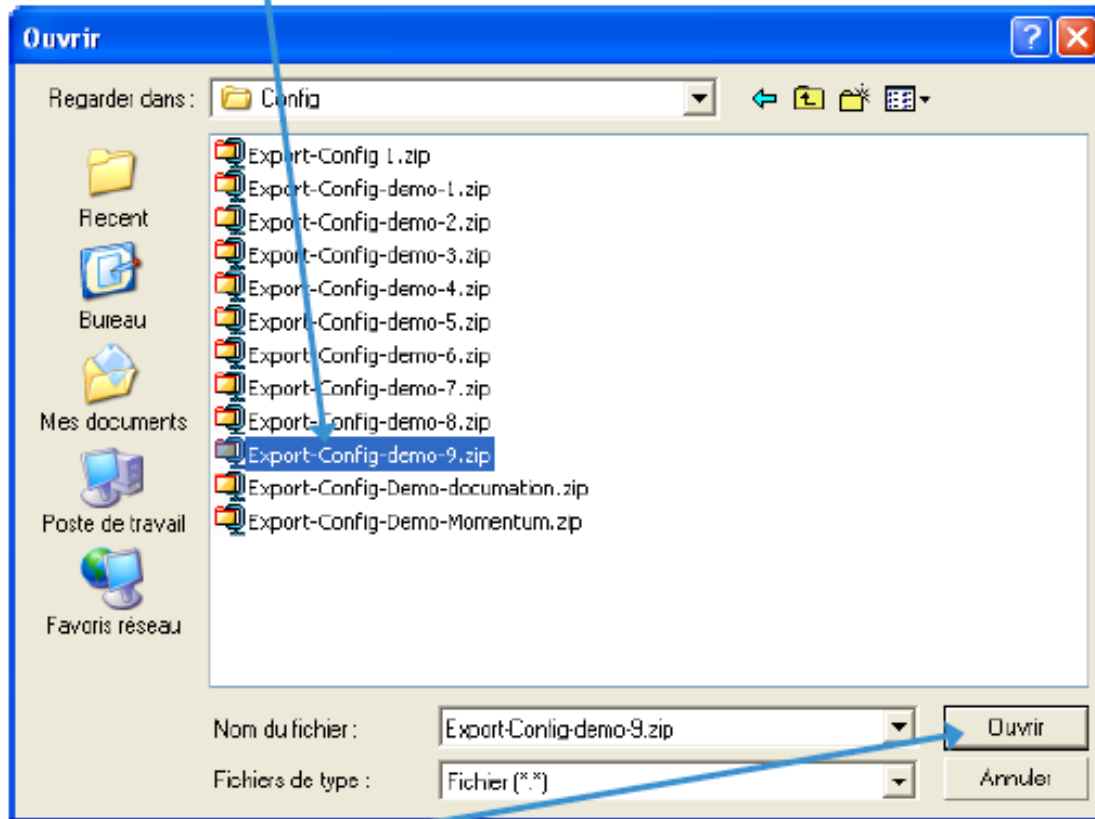- Select first the application or « All applications »

- Check the box to export
  the entire configuration

- For a selective export
  check the corresponding boxes
  to modules to export

- Click « OK »
  to export on the « file system »
  The export will produce a ZIP file

GOLOKA SOFTWARE
conscious value
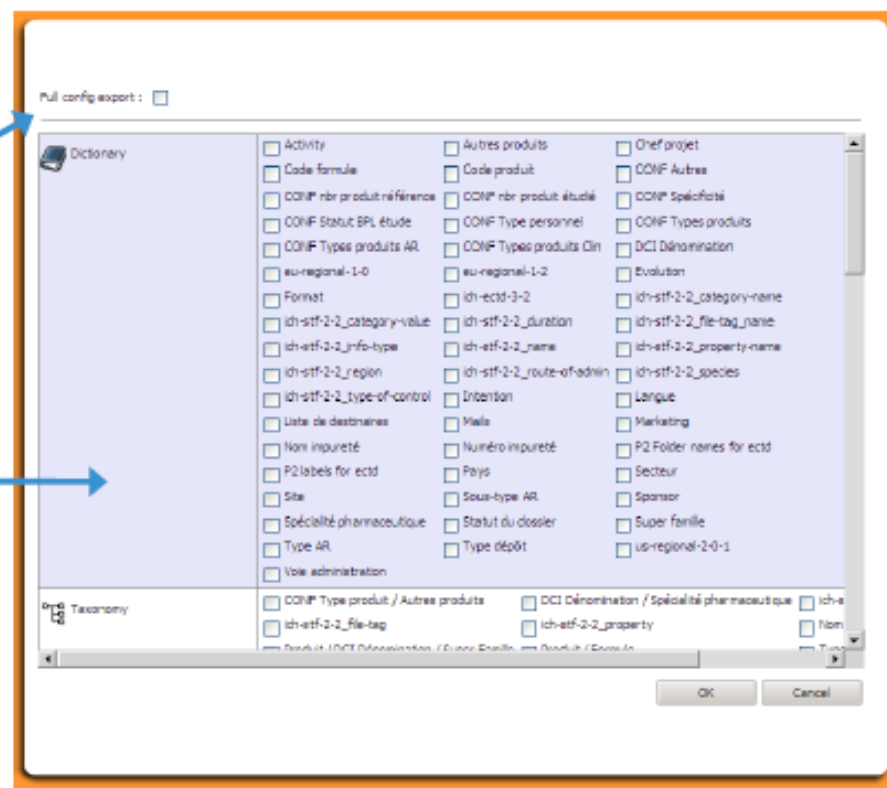
To import a configuration

- To import a configuration from the « file system »
- Select the configuration file (ZIP file) to import

- Then click « Open » to import the configuration

GOLOKA SOFTWARE
conscious value

To import a configuration

- The selective import screen will appear. It is the same behavior than the one of the restore function

You can import an old configuration saved from an older version of D2

Non existing elements, from previous versions (ex: query forms, menus, toolbars…) will be created.

Your old configuration will be upgraded.

The new elements will be automatically checked into the configuration matrix

To import a configuration (Command line)

- Configuration import could be launch without using administration interface.

- To do so, open DOS or Linux console and launch the following line (as explained later):

  java -cp [classpath] eu.c6.d2.api.config.batch.D2ConfigImport [-login login_name] [-password xxxxxx] [-docbase docbase_name] [-config_file file_config_path] [-full_import true|false] [-reset true|false] [optional parameters] [modules list]

- Classpath mus contain:
  - D2 libraries
  - DFC libraries
  - dfc.properties file

- These libraries are located into installation folders of JMS or D2 WebApps.

- Here are some examples of commands used for:
  - Partial import

    java eu.c6.d2.api.config.batch.D2ConfigImport -login dmadmin -password xxxxxxxx -docbase dev_d66_c6 -config_file C:\temp\FullExport-Config.zip -full_import false -reset false -keep_url_cache true -keep_mail_server true -d2_documentset "documentSet name" -d2_workflow_config "workflow config name 1|workflow config name 2|workflow config name 3 »

  - Complete import

    java eu.c6.d2.api.config.batch.D2ConfigImport -login dmadmin -password xxxxxxxx -docbase dev_d66_c6 -config_file C:\temp\FullExport-Config.zip -full_import true -reset true -keep_url_cache true -keep_mail_server true

GOLOKA SOFTWARE
conscious value

To import a configuration (Command line)

- Configuration import could be launch without using administration interface.

- To do so, open DOS or Linux console and launch the following line (as explained later):

java -cp [classpath] eu.c6.d2.api.config.batch.D2ConfigImport [-login login_name] [-password xxxxxx] [-docbase docbase_name] [-config_file file_config_path] [-full_import true|false] [-reset true|false] [optional parameters] [modules list]

- Classpath mus contain:
  - D2 libraries
  - DFC libraries
  - dfc.properties file

- These libraries are located into installation folders of JMS or D2 WebApps.

- Here are some examples of commands used for:
  - Partial import

    java eu.c6.d2.api.config.batch.D2ConfigImport -login dmadmin -password xxxxxxxx -docbase dev_d66_c6 -config_file C:\temp\FullExport-Config.zip -full_import false -reset false -keep_url_cache true -keep_mail_server true -d2_documentset "documentSet name" -d2_workflow_config "workflow config name 1|workflow config name 2|workflow config name 3 »

  - Complete import

    java eu.c6.d2.api.config.batch.D2ConfigImport -login dmadmin -password xxxxxxxx -docbase dev_d66_c6 -config_file C:\temp\FullExport-Config.zip -full_import true -reset true -keep_url_cache true -keep_mail_server true

To import a configuration (Command line)

- Following parameters are useful into command line:

  - Required:
    - login : repository connection login
    - password : repository connection password
    - docbase : repository name
    - config_file : configuration file
    - full_import : full or custom import
    - reset : reset of the existing configuration

  - Optional:
    - overwrite true|false : overwrite existing configuration (default: false)
    - keep_naming_counter true|false : keep naming counter (default: false)
    - keep_url_cache true|false : keep cache URLS values (default: false)
    - keep_mail_server true|false : keep mail servers configuration(default: false)
    - help : Show this message.

GOLOKA SOFTWARE
conscious value

Reset a Configuration

- To reset a configuration
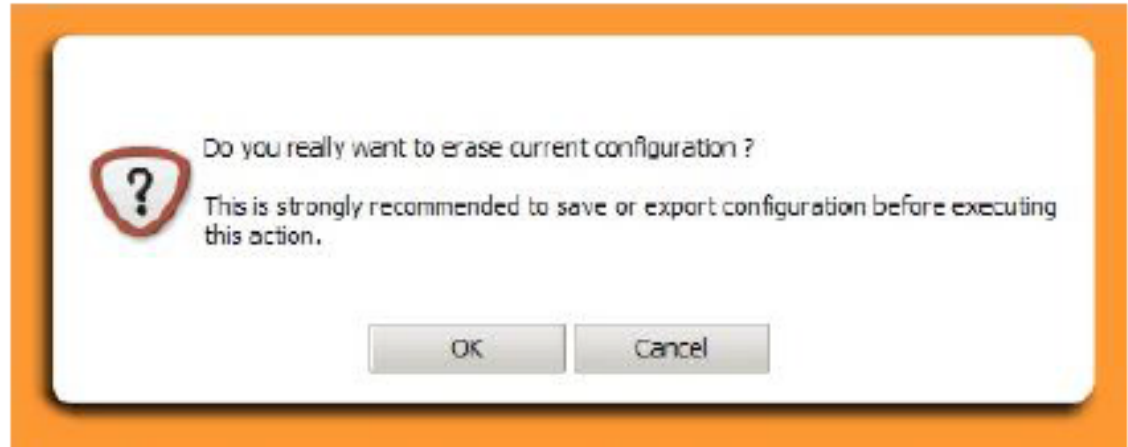
- Click « OK »
- ⚠ This will fully remove the ongoing configuration

D2 – Advanced Property Pages

- ✓ Template Lists

- ✓ Security Templates

- ✓ Auto Naming

- ✓ Auto Linking

- ✓ Linked Documents

GOLOKA SOFTWARE
conscious value

D2 Template Lists

- Document template lists can be created in order to be assigned to contexts. These templates are proposed at the end of the content creation process

- Each list owns a configurable administration group that makes it possible to define users authorized to modify them

- Lists are also visible in D2-Client by users being part of the access group of the administration access in order to be able to modify them without going through D2-Config application

- The configuration screen of the template lists is the following:

Template Lists

Click 🗋 , Enter the name, its description and the administration group

Properties
Name :* `New Template`
Description :
Administration group :

Autorize document without content : ☐
Selection mode : List ⦿ Query ○
Templates : [ ] ... Sele

- Check the box if you authorize the document without content
- To add a template in the list, click « … »
- Select a template
- Then click « > »
  to add it in the list

- You can also import some
  from your disk
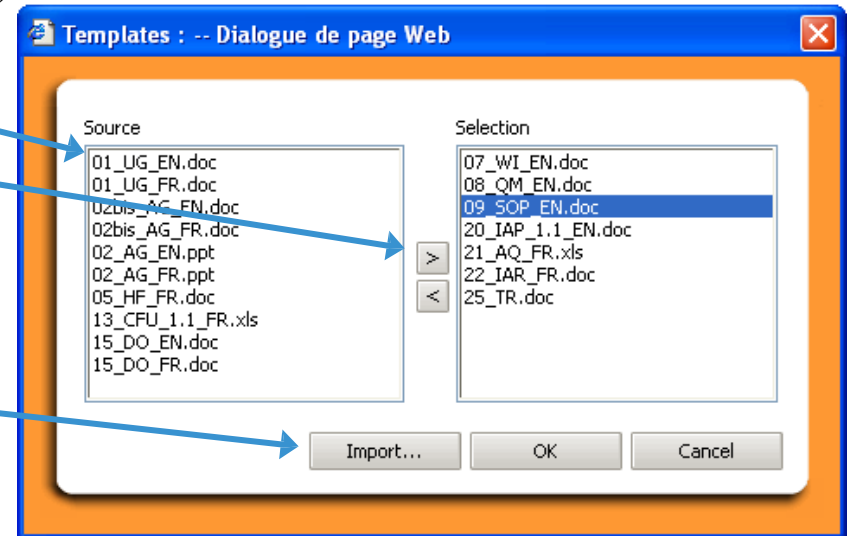
Templates : -- Dialogue de page Web

Source
- 01_UG_EN.doc
- 01_UG_FR.doc
- 02bis_AG_EN.doc
- 02bis_AG_FR.doc
- 02_AG_EN.ppt
- 02_AG_FR.ppt
- 05_HF_FR.doc
- 13_CFU_1.1_FR.xls
- 15_DO_EN.doc
- 15_DO_FR.doc

Selection
- 07_WI_EN.doc
- 08_QM_EN.doc
- 09_SOP_EN.doc
- 20_IAP_1.1_EN.doc
- 21_AQ_FR.xls
- 22_IAR_FR.doc
- 25_TR.doc

> <

Import... OK Cancel

D2 – Advanced Property Pages

- ✓ Template Lists

- ✓ Security Templates

- ✓ Auto Naming

- ✓ Auto Linking

- ✓ Linked Documents

GOLOKA SOFTWARE
conscious value

D2 Lifecycle Configuration

- ✓ Lifecycles Overview

- ✓ D2 Lifecycles

- ✓ State Configuration

- ✓ Condition Configurations

- ✓ Dialog Box Configuration

- ✓ Automatic Transition Configuration

GOLOKA SOFTWARE
conscious value

Lifecycle Overview

Module Objectives

✓ Describe D2 Lifecycle

✓ Configuring a Lifecycle

    ✓ Define States

    ✓ Define lifecycle actions

    ✓ Define state entry conditions

    ✓ Define transition conditions

    ✓ Configure an automatic dialog prompt

GOLOKA SOFTWARE
conscious value

D2 Lifecycles

Lifecycle can be configured and applied to Document in D2 to:

- ✓ Track the state of a Document

- ✓ Perform automatic actions

- ✓ Enforce Business rules and conditions

Lifecycle configured in D2-Config are propitiatory to D2 Applications.

- ✓ Not accessible outside the D2-Client

- ✓ Not stored as dm_policy objects

- ✓ Functionality similar to Documentum LIfecycles

- ✓ Integrated into D2 applications configuration for easy portability

GOLOKA SOFTWARE
conscious value

Business Scenario Requirement

Business Scenario Requirements

- ✓ The business requirements that we are configuring for the Quality Management applications are :

- ✓ A lifecycle is automatic applied to every newly created document

- ✓ The lifecycle consists of five linear states: Draft, Review, Pending, Effective and Obsolete

- ✓ A Documents current lifecycle state is visible in the D2-Client work area.

- ✓ A Documents permissions are automatically changed on promotion and demotion

- ✓ A Document cannot be promoted if it is checked out

- ✓ Document in the Review, Pending, and Effective states are returned to the Draft state when they are modified.

Business Scenario Config Steps

The Quality Management Application Requires the following configuration to meet the requirements:

1. Lifecycle

   ✓ Define states, transition conditions and actions

2. Security Template for each lifecycle state

3. Document Set for each lifecycle state.

   ✓ Enable D2 to identify the correct security configuration.

4. Property page

   ✓ To prompt user for effective date