

EMC® Documentum® D2 Premium

Release 4.0

Administration Guide

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Introduction

- D2 is a solution composed of several applications :
 - A configuration layer dedicated to administrators : **D2 - Configuration**
 - A user interface to access content : **D2 - Client**
- It offers a configuration interface enabling the most complex rules to be set up without any development
- D2 is composed of a group of configurable modules enabling the user to configure all main solution features such as security models, classification pattern, properties dialogs, life cycles, Workflows, etc.
- This guide is dedicated to the setting of the solution with D2-Configuration

Note on the validation of values

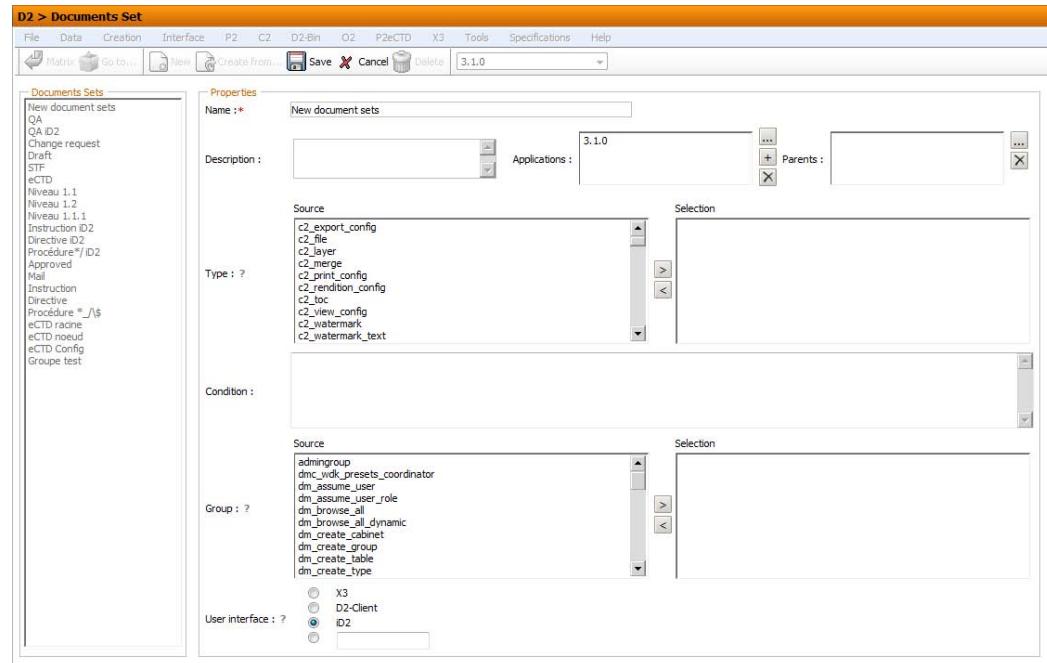
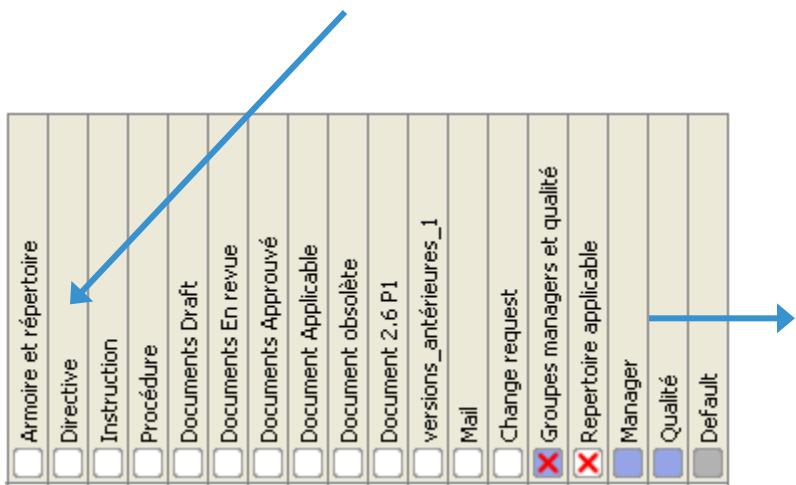
- To maintain the flexibility of D2, no validation of values is done on configuration side, assuming the input value correct.
- Therefore, make sure that all input values are consistent before saving each configuration module.
- So, check for example that:
 - Integer is used to define sizes (height, width...) (Properties module)
 - Existing placeholders or correctly formatted date are used (Default values module)
 - Negative signed numeric value is used to setup overdue days (Workflow modules)

Contexts

Contexts

- The context function makes it possible to gather sets of content or groups, in order to assign particular treatments to them (such as for example a specific autolink schema)
- These document sets are characterized by two criteria (types* and DQL queries)
- To access them,
Click a context in the configuration

matrix



* Mandatory

Creation of a context

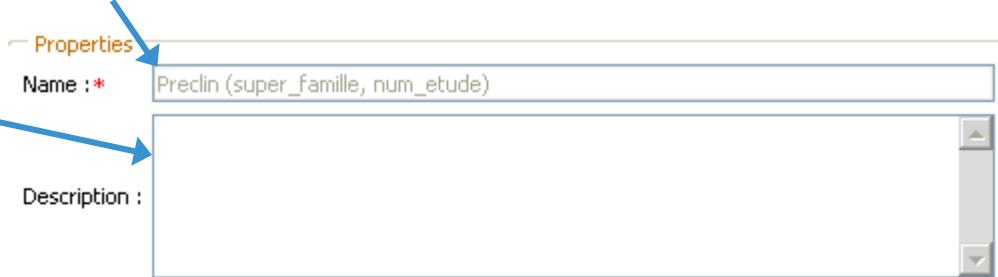
- Click  and enter the name

and the description

Properties

Name : * Preclin (super_famille, num_etude)

Description :



- Select a type *
- (you can repeat the operation to add several types)

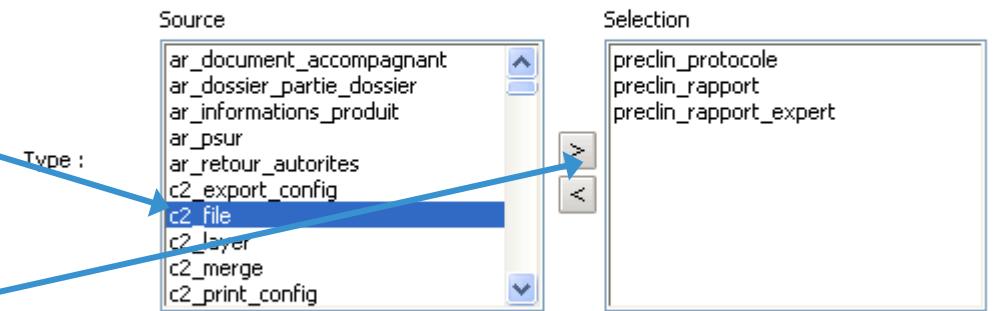
Type :

Source

ar_document_accompagnant
ar_dossier_partie_dossier
ar_informations_produit
ar_psur
ar_retour_autorites
c2_export_config
c2_file
c2_layer
c2_merge
c2_print_config

Selection

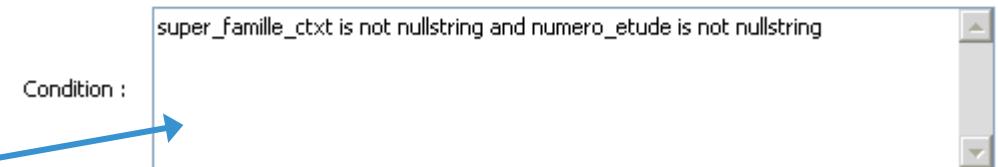
preclin_protocole
preclin_rapport
preclin_rapport_expert



- Click « > » to add it in the list

Condition :

super_famille_ctxt is not nullstring and numero_etude is not nullstring

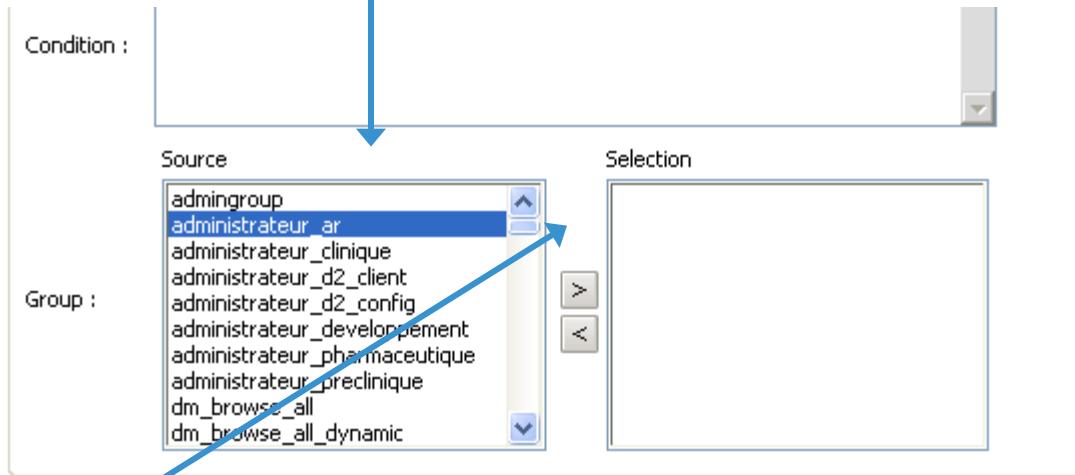


- Enter your condition (DQL query)

* Mandatory

Creation of a context

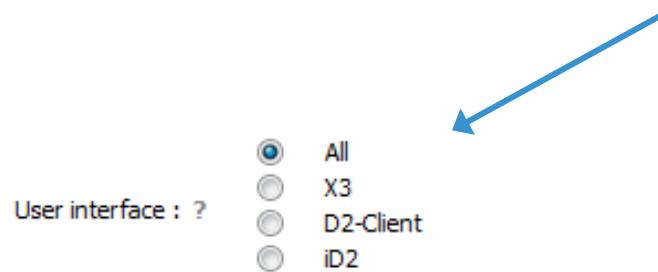
- Select a group (you can repeat the operation to add several groups)
- You can also select a group who can be for example, associated with a menu configuration (you can repeat to add more groups).



- Click « > » to add it in the list
- Click to save or on cancel ongoing modifications since the last save
- The final condition is:
Condition AND (Group_1 OR Group_2 OR ... Group_n)

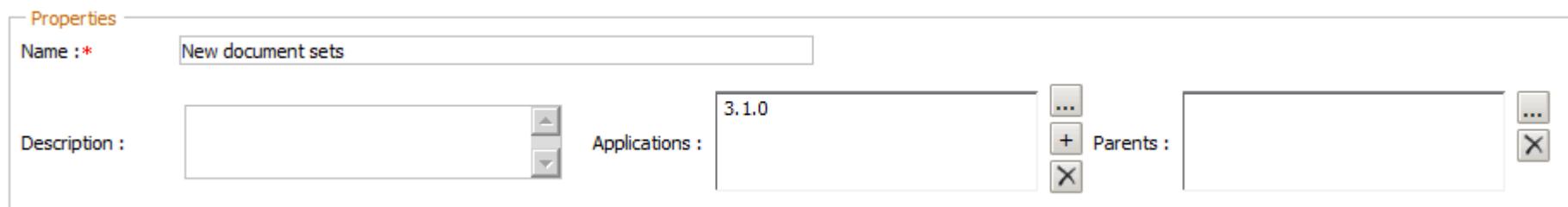
Documents set and user interface (Suite)

- Contexts allow also to define user interface.
- Thus, specific configurations of properties page can be associated to different objects based on the application used for browsing.
- You have the capability to choose one of the following user interfaces:



Contexts Tree

- To make easier the reading of configuration matrix, contexts can be organized using a multi-levels structured tree.
- To do so, go to child's context and add in « Parents » list the parent's name.



- « Parents » represent the next level, where the context will be contained.
- It is possible to add several « Parents » for a same « child ».
- You can add as many parents as levels in the tree.
- When Parents and childs are determined. The configuration matrix is changed. Contexts « racine » or « parents » display with an arrow.

Change of context

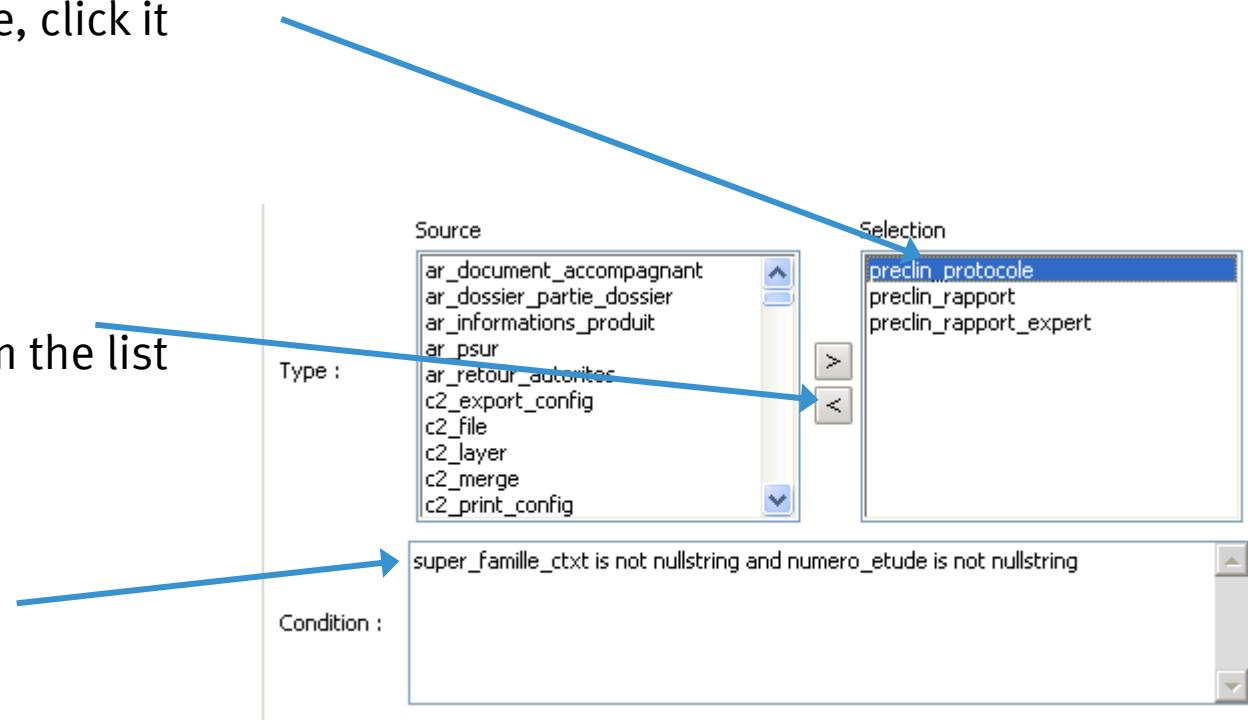
- To remove a type, click it

- Click « < »
to remove it from the list

- Modify
the condition

- You can also remove a group in the same way

- Click  to cancel the ongoing modifications since the last save



* Mandatory

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Context visualization

- Six types of icons inform you about the nature (type and/or group) of context

<input checked="" type="checkbox"/> Import ectd	<input checked="" type="checkbox"/> Test User	<input type="checkbox"/> D2 Notes	<input checked="" type="checkbox"/> subcontractor_spec_certificate_analysis_active	<input checked="" type="checkbox"/> subcontractor_spec_standard_certificates_active	<input checked="" type="checkbox"/> supplier_spec_doc_expiration_date	<input checked="" type="checkbox"/> supplier_spec_standard_certificate_expiration	<input checked="" type="checkbox"/> supplier_spec_certificate_analysis_active	<input checked="" type="checkbox"/> supplier_spec_standard_certificate_expiration	<input checked="" type="checkbox"/> supplier_spec_doc_active	<input type="checkbox"/> supplier_spec	<input checked="" type="checkbox"/> customer_spec	<input checked="" type="checkbox"/> customer_spec_active	<input checked="" type="checkbox"/> customer_spec_active_obsolete	<input checked="" type="checkbox"/> purchasing_contract_expiration_date	<input checked="" type="checkbox"/> purchasing_contract_last_date_for_interruption	<input checked="" type="checkbox"/> purchasing_contract_wo_effective_date	<input checked="" type="checkbox"/> purchasing_contract_active_obsolete	<input checked="" type="checkbox"/> purchasing_contract_superseded	<input type="checkbox"/> TEST	<input type="checkbox"/> purchasing_contract_set	<input checked="" type="checkbox"/> SDM_Confidential_document	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/> sdm_active	<input checked="" type="checkbox"/> sdm_draft	<input checked="" type="checkbox"/> sdm_obsolete	<input checked="" type="checkbox"/> SDM	<input checked="" type="checkbox"/> Folder	<input checked="" type="checkbox"/> P2 Application Root	<input checked="" type="checkbox"/> P2 Application Node	<input type="checkbox"/> Document Affaires	<input type="checkbox"/> Dossier Affaires	<input type="checkbox"/> dm_Folder	<input type="checkbox"/> Renault Doc	<input checked="" type="checkbox"/> Test Max Autolink	<input checked="" type="checkbox"/> Default
---	---	-----------------------------------	--	---	---	---	---	---	--	--	---	--	---	---	--	---	---	--	-------------------------------	--	---	----------------------------	---------------------------------------	---------------------------------------	--	---	--	---	--	---	---	--	---	------------------------------------	--------------------------------------	---	---

<input checked="" type="checkbox"/>	Type and group definition
<input checked="" type="checkbox"/>	One or several group(s)
<input type="checkbox"/>	One or several type(s)
<input checked="" type="checkbox"/>	A set with a type not marked (in use) in selected application
<input checked="" type="checkbox"/>	A set with a group not marked (in use) in selected application
<input checked="" type="checkbox"/>	A set with a group not marked (in use)
<input checked="" type="checkbox"/>	A set with a type not marked (in use)
<input checked="" type="checkbox"/>	A set with a type and group definition not marked (in use)

D2 Configuration matrix

D2 3.1 & 4.0

Main configuration matrix

- The main configuration matrix makes it possible to associate different settings to set of content :

- Auto naming models
- Security models
- Audit events
- Checkin configuration
- Checkout configuration
- List of properties inheritance
- bulk update
- autolink models
- Linked documents
- Rendition servers
- Properties dialogs



- Templates
- Workflows
- Mailing list
- Lifecycles
- Lifecycle batch
- Subscription
- Display filters
- Plug-in
- Menu
- Tools
- Query Form
- Searches



- The order of contexts(column on the top) is very important because the system goes through the configuration matrix from the left to the right hand side and selects the first one that matches

The configuration matrix

The configuration is performed by simply check mark, combining configuration elements with contexts

Configuration modules can be compressed and decompressed for readability.

Contexts can be tree structured

Tree of contexts

Configuration components

Reading order

Contexts

D2

Contexts	QA	QA ID2	Change request	STF	eCTD	Group1	Group2	Test Racine	Qualité	Mail	Groupe test	Default
Auto naming	○	○	○	○	○	✗	✗	✗	✗	✗	✗	✗
Property page	○	○	○	○	○	✗	✗	✗	✗	✗	✗	✗
Nouvel héritage												
Security	○	○										
Auto link	○	○	○	○	○							
MOD Default												
VD Documents draft												
LK Change request	○											
Checkin	○	○										
Checkout												
Lifecycle			○									

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Reading order

- You can organize contexts by moving them.
To do that, click (with the right button of the mouse) on the context to move
(the hand appears)

Préclinique	Clinique	Pharmaceutique	AR	Préclinique Draft	Préclinique En revue	Préclinique Approuvé Signé Pérимé	Clinique Draft	Clinique En revue	Clinique Approuvé Signé Pérимé	Pharmaceutique Draft	Pharmaceutique En revue	Pharmaceutique Approuvé Signé Pérимé	AR Draft	AR En revue	AR Approuvé Signé Pérимé	Décliné divers bibliothèque	
						Préclinique Approuvé Signé Pérимé							✓		✓		

- Maintain the click and move the column
- Drop it at the new position, column is moved

To set a configuration to a context

- To set a configuration to a context, search in the configuration matrix the cell that corresponds to the crossing of the desired configuration element and context
- To help you to find the corresponding crossin click a cell (with the right mouse button), maintain clicked and both corresponding ends will be changed to orange
- To select a configuration, double-click in the corresponding cell and it will be selected (checked)



	Armoire et répertoire	Directive	Instruction	Procédure	Documents Draft	Documents En revue	Documents Approuvé	Document Applicable
AN change_request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AN test CR intervalle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AN_General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FP Change request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FP Date application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FP Document défaut	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FP Document détaillé	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
FP Email O2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MAJ Procédure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HRT Général	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Browse a tree of contexts

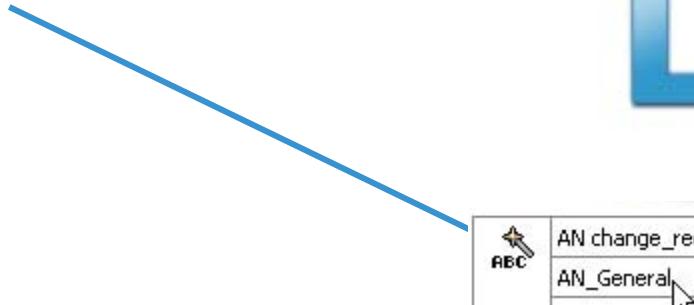
The screenshot shows the D2 software interface. At the top, there's a navigation bar with 'Root' and 'QA' buttons. Below it is a large 'D2' logo. The main area is titled 'Configuration elements'. A legend on the right defines symbols: a grey square for 'Contexts', a white square with a black border for 'Instruction', a white square with a black border and a downward arrow for 'Directive', a white square with a black border and a diagonal line for 'Procedure * \\$', and a grey square with a black border for 'Default'. The configuration matrix lists elements on the left and contexts at the top. Elements include Auto naming, Property page, Security, STF, PL P2, PL Default, PL CR, eCTD, MOD Default, VD Documents draft, LK Change request, Checkin, Checkout, Lifecycle, Workflow, and New skin. Symbols in the matrix indicate specific configurations or status for each element-context combination.

	Contexts	Instruction	Directive	Procedure * \\$	Default
Auto naming					
Property page		○	○	○	
Security					
STF					
PL P2					✓
PL Default					
PL CR					
eCTD					
MOD Default					✓
VD Documents draft					
LK Change request				✓	
Checkin					
Checkout					
Lifecycle					○
Workflow					
New skin					

- The arrow under sets indicates tree of contexts.
- To access different levels click this symbol.
- When you browse a tree, a way enabling to locate the tree level displays above the configuration matrix.
- Through this way it is possible to go back in tree levels by clicking on the level.
- To refine matrix display, you can use filters.
- When several configurations are available for a module, compressed elements display into the tree.
- A simple check mark displays to specify module combination with context.
- A circle displays to represent a whole numbers of ticks for a set of modules.

To modify a configuration

- To modify a configuration, click it



D2

	Armoire et répertoire	Instruction	Procédure	test subscription	Documents Draft	Documents En revue	versions_antérieures_1	Document Applicable	Document obsolète	Documents Approuvé	Document 2.6 P1
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						

- You will be automatically put on it

D2 > Auto Naming

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete 3.1.0

Auto Namings

- AN eCTD
- AN Email
- AN general
- AN Mail attachments
- AN QA Docs
- AN STF

Properties

Name : * AN eCTD

Description :

Applications : 3.1.0

Naming

Properties : object_name

Generate the document name for each property modification :

Regenerate on new version :

Property name : *

Auto naming template : *

C6_ "r_creation_date" _"0000" yyyy

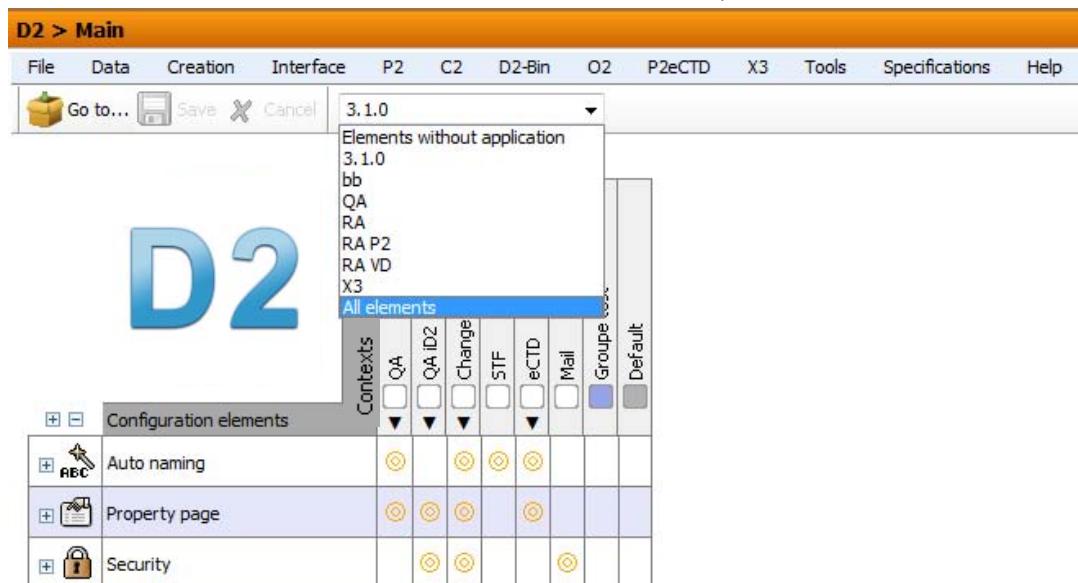
Counter value : 2

Counter depends on template properties :

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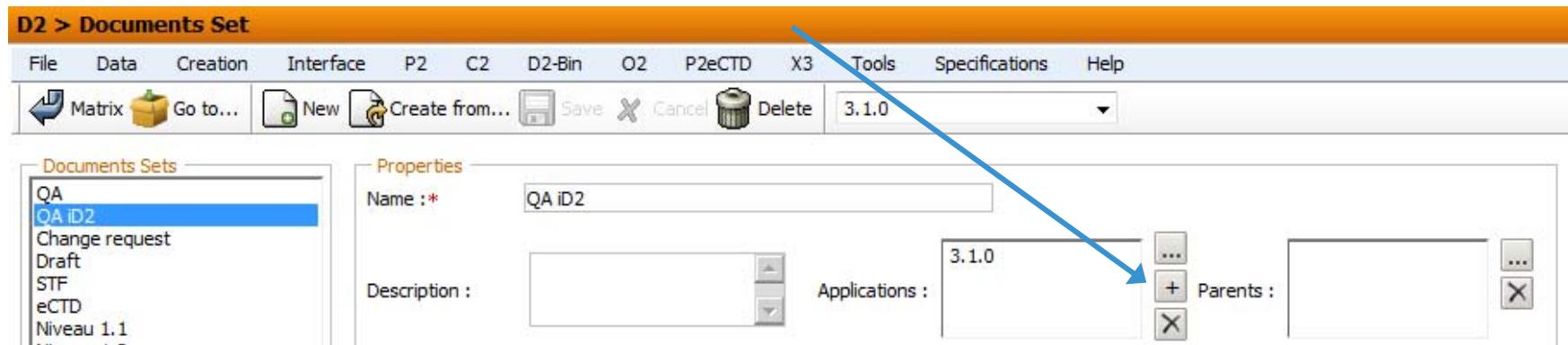
Application filters

- D2 configuration makes it possible to manage display filters by application
- To make easier configuration matrix reading, you can group contexts and their configurations combined in applications.
- Then, you can view through the configuration filter, only one application in the main matrix and modules.
- You can group contexts and associated configurations in order to display only one application in the configuration matrix.
- You can select « *All elements* » to view them all or only one

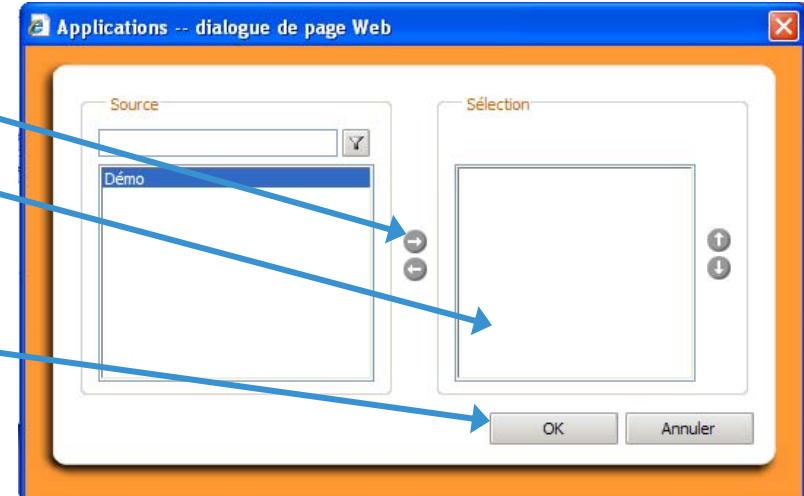


Application filters

- Applications are defined into the contexts and into each configuration done
- To add an application, click « ... »

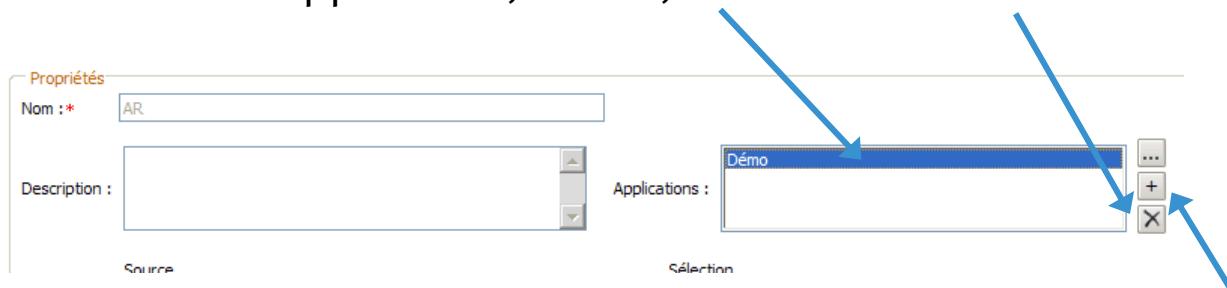


- Then select the application and click the right hand side arrow to add it in the list of applications
- Click « OK »

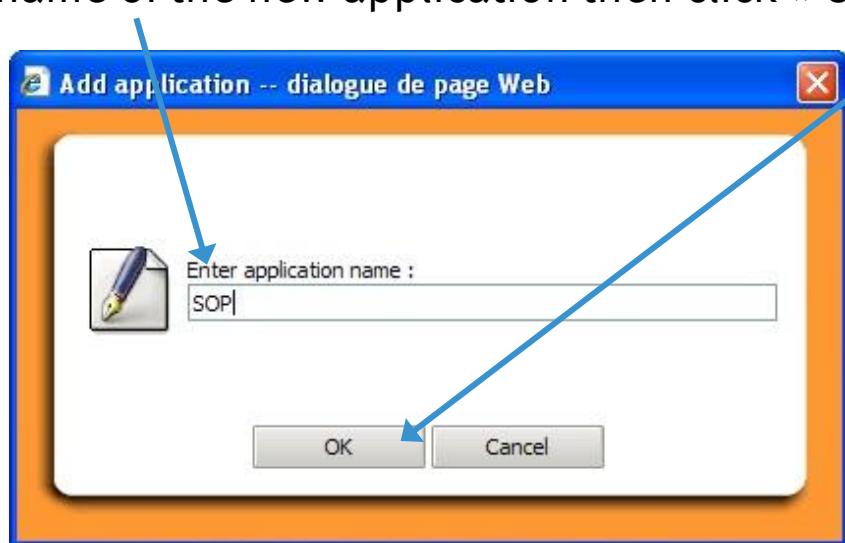


Application filters

- To remove an application, click it, then on « x »

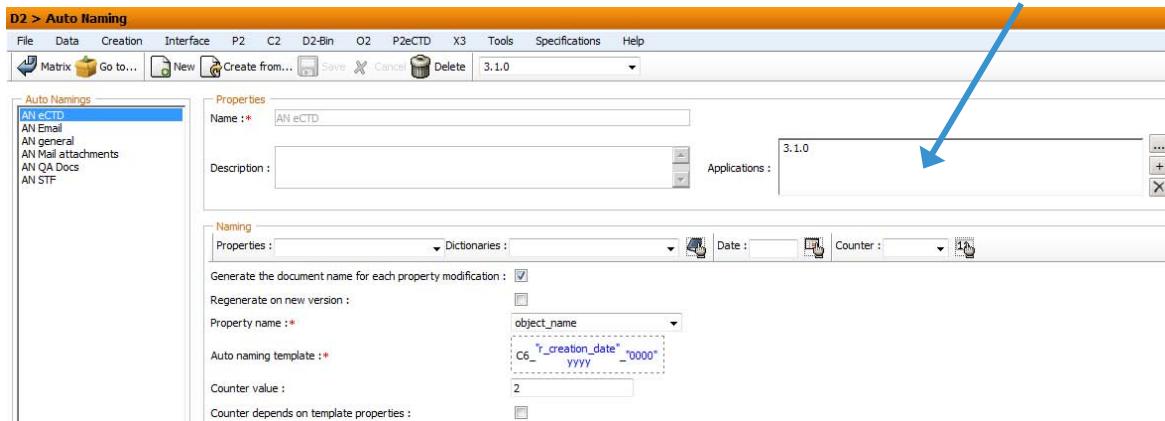


- To create a new application and add it in the list, click « + »
- Enter the name of the new application then click « OK »

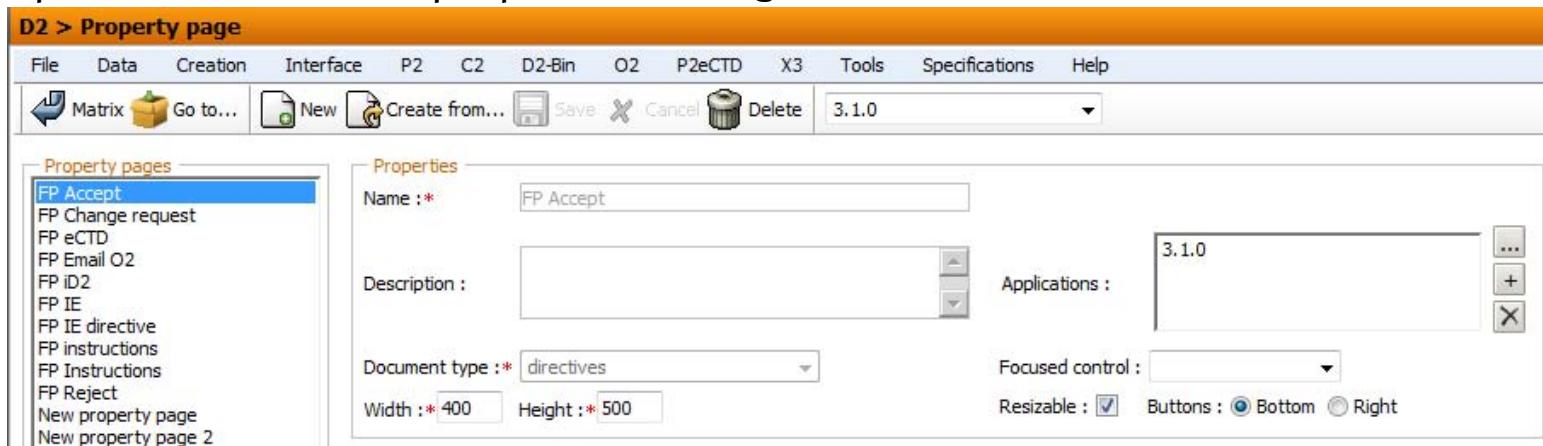


Application filters

- You can define an application on contexts and all configuration modules
- Example of screen of the autolink configuration module



- Example of screen of the properties dialog module



General Configuration

Main Menu

File Data Creation Interface C2 P2 P2eCTD X3 Tools Help

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Dictionary and taxonomy

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Dictionaries

- A dictionary is a set of values. Each value can be translated in several languages and can have several aliases.
- Dictionaries are used to :
 - Assist the user in the choice of a value for a property
 - Generate automatic autolink patterns
 - Create taxonomies by linking several dictionaries, in order to organize values in hierarchy
 - Create register table

Dictionaries creation screen

D2 > Dictionary

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete Import... Export... Save dictionary Restore dictionary Update database Elements without application

Dictionaries

Properties

Name :* Activity

Description :

Applications :

Versioned dictionary :

Groups Labels

Administration group : admingroup

Search Dictionary available for the group :

Manual sort :

Create a registered table :

DQL dictionary :

Languages Alias

Add language Remove language Remove value

Key	French	English
AUT	Autorités	Authorities
INFO	Information	Information
MAA	AMM	MAA
SAFETY	Sécurité	Safety

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To create a new dictionary

- Click  enter, in the following form, dictionary name. You can add it description and/or application

Properties

Name :*	Cible
Description :	
Applications :	
<input type="button" value="..."/> <input type="button" value="+"/> <input type="button" value="X"/>	
<input checked="" type="radio"/> Groups <input type="radio"/> Labels	
Administration group :	
Search Dictionary available for the group :	

- You can set up an admin group and make the dictionary available for searches for a group

- In the second tabsheet, enter the labels (english and french) which will appear in the creation matrix if the dictionary is used for creating content

Groups Labels

Label fr :	
Label en :	

Manual sort :
DQL dictionary :

Languages Alias

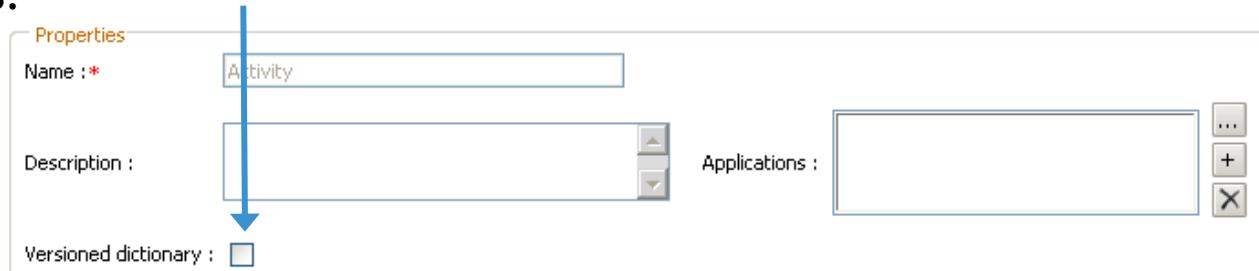
Add language	Remove language	Remove value
	Key	French
<input checked="" type="checkbox"/>	labo	Laboratoire
<input checked="" type="checkbox"/>	pharma	Pharmacie



Dictionary name does not contain '/' character used for taxonomies.

Versioning a values dictionary

- To keep all changes made to dictionaries, D2 allows you versioning of your values list. To do this, check the following box. So, the dictionary will be versioned when each record occurs.



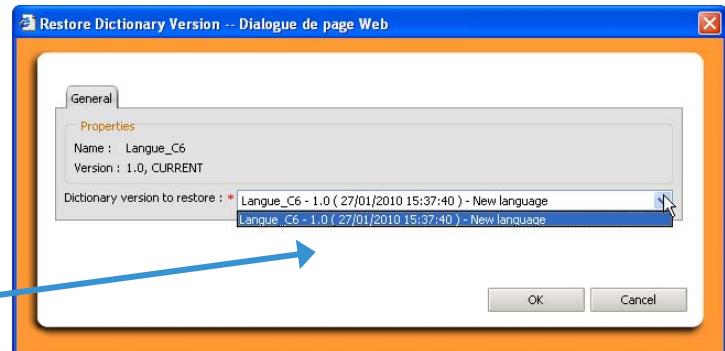
- It is possible to manually create versions using the button « Save dictionary ».



- A dialog box opens, allowing you to select the version. You can also add a description.



- You have the ability to restore a dictionary from an existing version.
- Click →



To create a new dictionary

- The value will be moved up in the list

	Key	French	English
<input checked="" type="checkbox"/>	Autre_10	Autre produit 10	Other product 10
<input checked="" type="checkbox"/>	Autre_1	Autre produit 1	Other product 1

- To move down a value, click the arrow
- Select tab « languages » or « alias » as desired

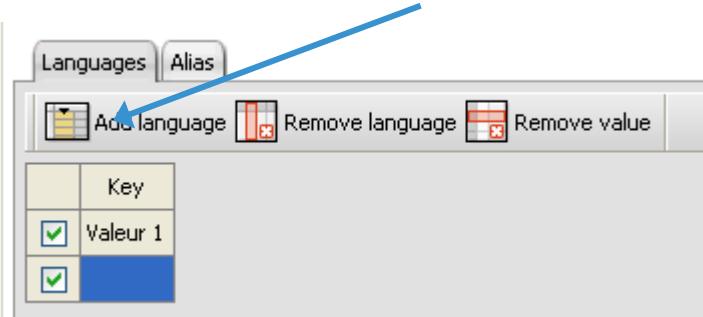
Key	Value
Autre_10	

- Enter the value in the column key (a key entered in a tab will be automatically created in the other tab)
- A new line will be automatically added to enter a new value

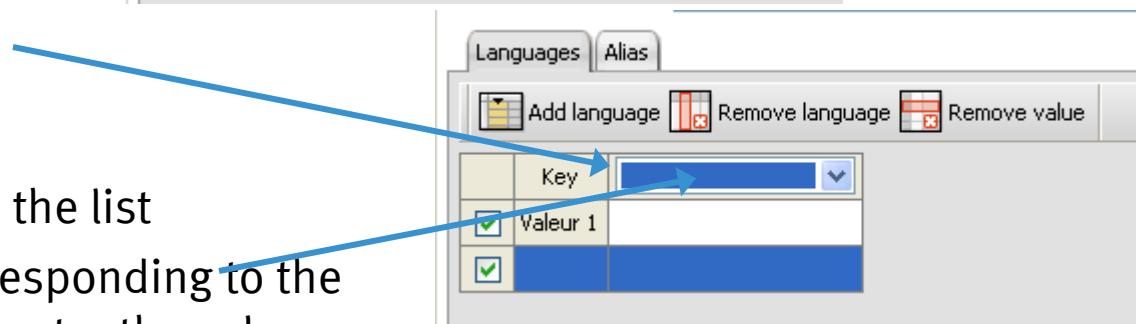
Key	Value
Valeur 1	

To create a language

- To add a new language, click « Add language »

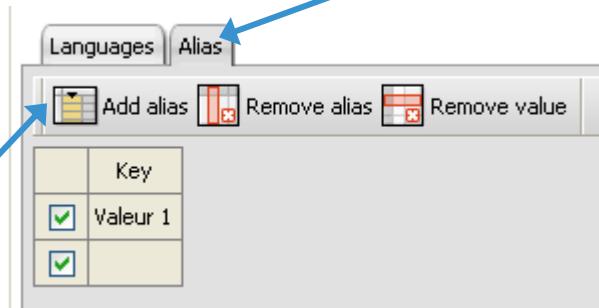


- To add a new column

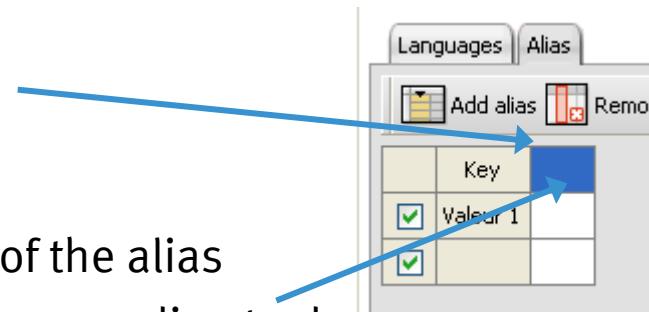


To create an alias

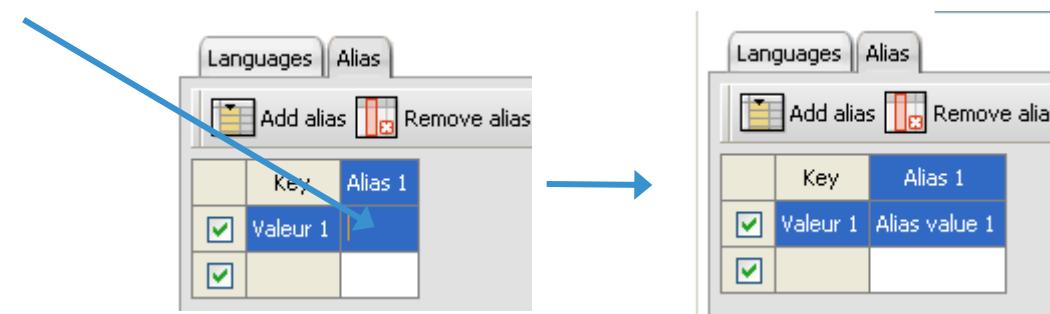
- To add a new alias click the tab « Alias »



- Then on « Add alias » to add a new column

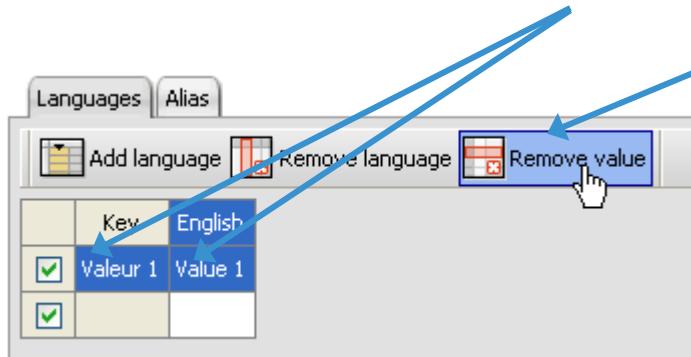


- Then enter the name of the alias
- Then click the cell corresponding to desired alias and enter the value



To remove a value

- To remove a value, select a cell in the line of the value to remove.
Then click « Remove value »

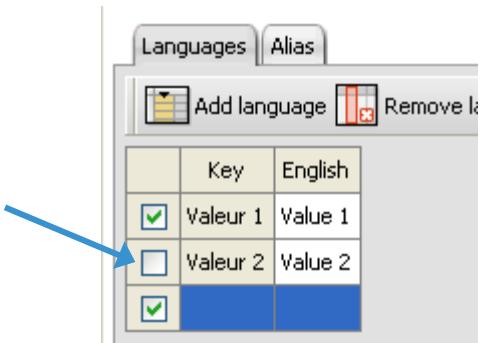


- The following message will appear
Click « Ok » and the value will be removed

You cannot remove a value used in a taxonomy.

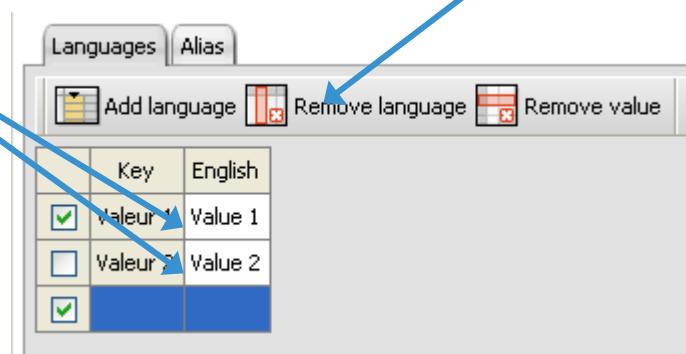


To remove this value from the choice list of properties,
you have to de validate it by checking off the box in the
first column

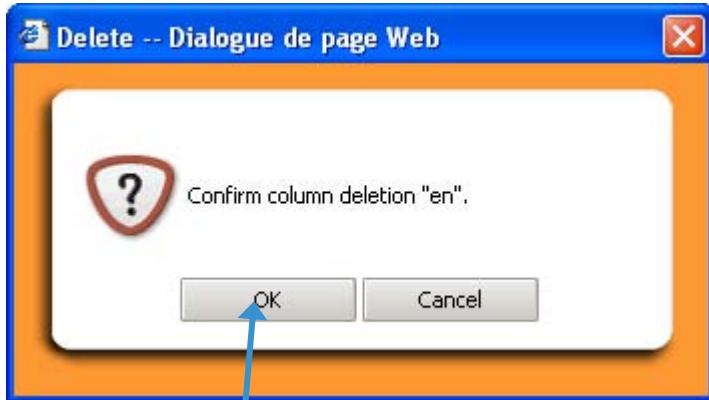


To remove a language

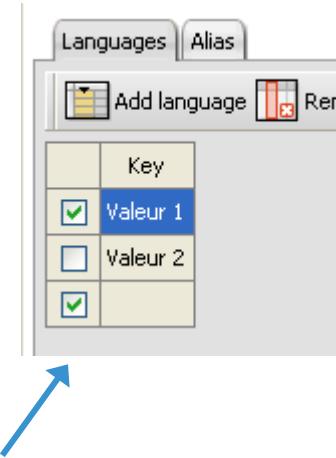
- To remove a language, click a cell of the column of the language to remove.
Then click « Remove language »



- The following message will appear

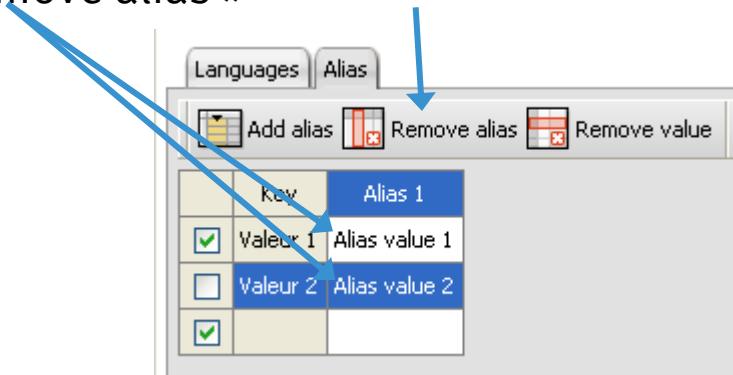


- Click « Ok » and the language will be removed



To remove an alias

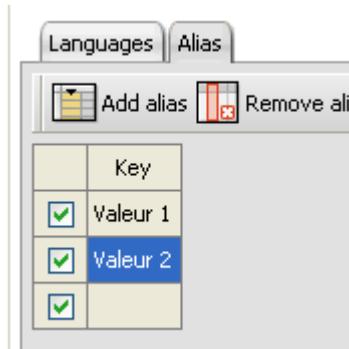
- To remove an alias, click a cell of the column of the alias to remove. Then click « Remove alias »



- The following message will appear



- Click « Ok » and the alias will be removed



To create a DQL dictionary

- To enable DQL dictionary creation, check the following checkbox

DQL dictionary : Dictionary caching : ?

select object_name as name, object_name, title from dm_cabinet where object_name like '\$value(object_name)'

DQL query : ?

- You can use the following when typing a DQL query:

-'**as name**' after an key attribute

-'**as is_enabled**' to enable or disable boolean properties

-'**as mon_alias**' to create a different label from the default attribute label

-'**as label_en/fr**' to translate values

-'**\$value()**' into the WHERE to refine the result

- To optimize the application performance, you can setup a cache for DQL dictionary.

DQL dictionary : Dictionary caching : ?

select object_name as name, object_name, title from dm_cabinet where object_name like '\$value(object_name)'

DQL query : ?

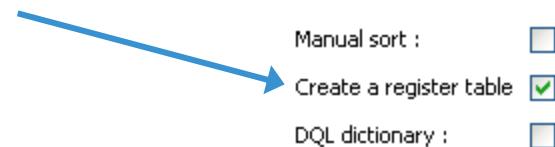
When you check 'dictionary caching', performances will be greatly enhanced.
However, dictionary will only be updated on application server restarting or on cache refreshing.



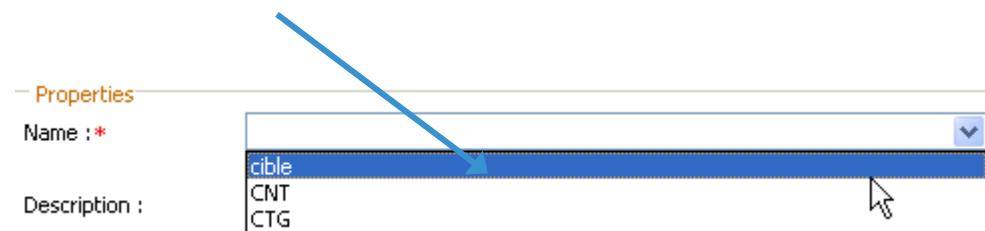
The dictionary will be updated when the server reboot or when cache is manually refreshed

To create a register table

- You can also, from this module, create an external table based on values contained in a dictionary.
- To do this, check the following box into a dictionary configuration:

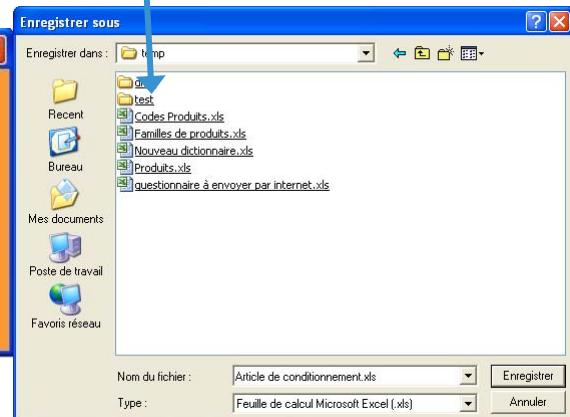


- Then, save changes:
- So, the dictionary is available in the management module of external tables.
- To use it as an external table, select it in the list of names.

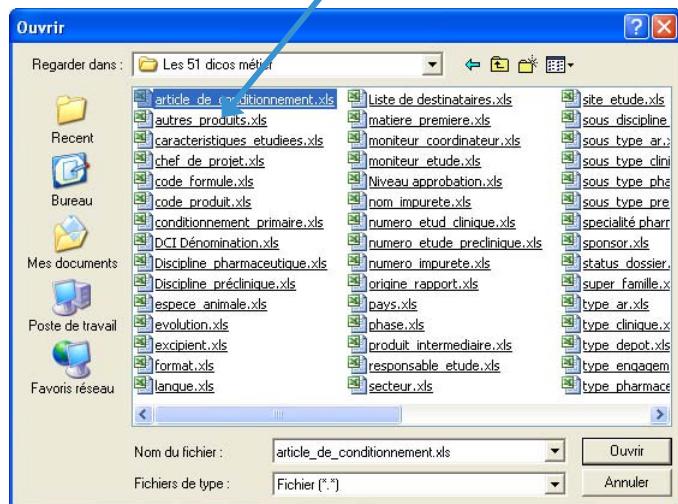


To Import / Export a dictionary

- To export a dictionary, click export. Select the format, then the target



- To import a dictionary, click import, select the file to import then select the import type (append or overwrite)



To update the repository after dictionary modification

- When you change the value of an alias (or language) of a dictionary, the properties that use this value will be automatically updated, but you need to run the autolink method to move content that has been located with a path using this value
- This can be automatically done by clicking on the button «update repository»



- This will execute the update job planned in the repository to move the content according to the changes done

Taxonomies

- Taxonomies make it possible to link between several dictionaries to make hierarchies of values and to allow users to select values through different linked lists

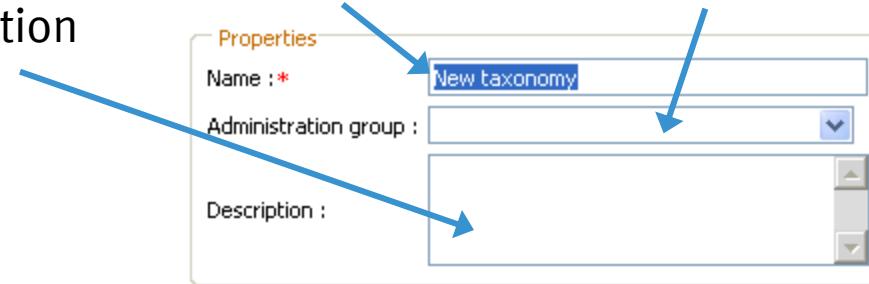
The screenshot shows the D2 > Taxonomy application interface. The top menu bar includes File, Data, Creation, Interface, P2, C2, D2-Bin, O2, P2eCTD, X3, Tools, Specifications, and Help. Below the menu is a toolbar with icons for Matrix, Go to..., New, Create from..., Save, Cancel, Delete, Import..., Export..., Save taxonomy, and Restore taxonomy. A dropdown menu 'Elements without application' is also present.

The main area is divided into several sections:

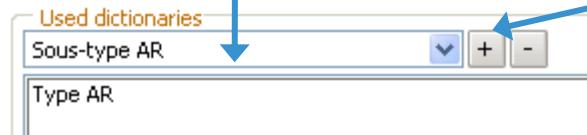
- Taxonomies:** A list of taxonomy entries including "CONF Type produit / Autres produits", "DCI Dénomination / Spécialité pha", "ich-stf-2_2_category", "ich-stf-2_2_file-tag", "ich-stf-2_2_property", "Nom impureté / Numéro impureté", "Produit / DCI Dénomination / Supe", "Produit / Formule", "RA Document Rules", and "Type / Sous-type AR".
- Properties:** Fields for Name (set to "CONF Type produit / Autres produits"), Administration group (set to "administrators_d2_config"), Description, Applications, and Versioned taxonomy.
- Taxonomy values:** A tree view showing the structure of the taxonomy. The root node is "CONF Type produit / Autres produits", which branches into numbered nodes (1 through 37) and then into "Autre_x" entries (e.g., Autre_1 through Autre_37).
- Used dictionaries:** A list containing "CONF Types produits" and "Autres produits".
- Dictionary values:** A large empty container area.

To create a new taxonomy

- Click  then enter the name, the administration group and the description

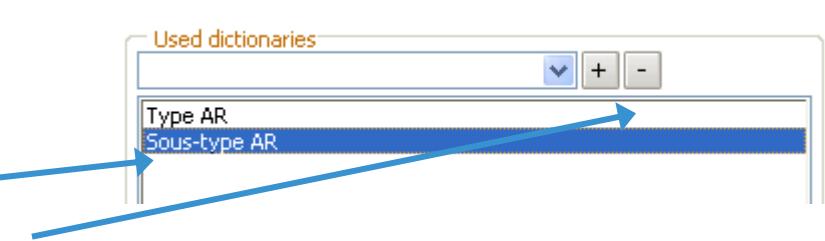


- Select a dictionary in the list and click the button «+» to add it in the list



- You can add as many level as necessary

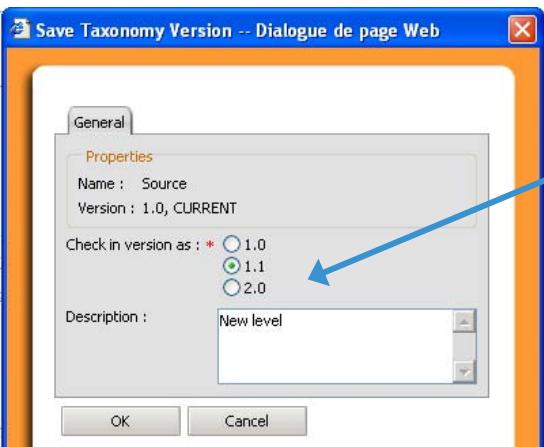
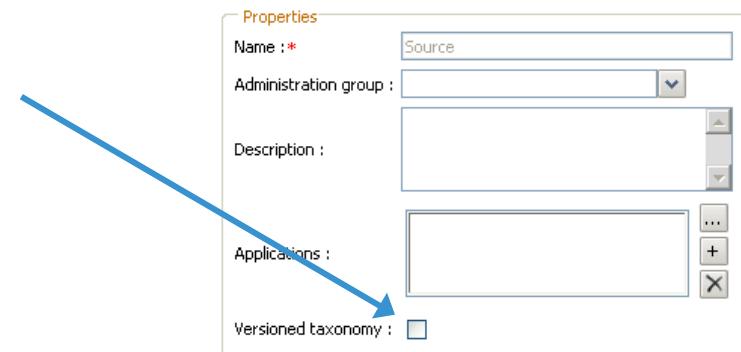
- To remove a level, select the level to remove then click the button «-»



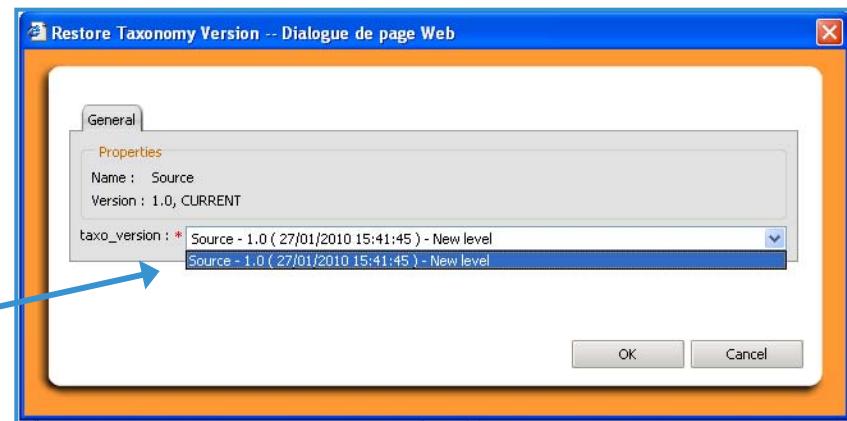
You can remove only the last level

Versioning a taxonomy

- To keep all changes made on taxonomies, D2 allows you versioning of your values list.
To do this, check the following box
- Make changes on the structure and save the taxonomy



- A dialog box opens allowing you to select the version. You can also add a description.



- You have the ability to restore a dictionary from an existing version.
- Click on

To create a new taxonomy

- Once the levels selected, you can organize the data in the tree. Click the level on which you want to add values
 - The dictionary of the lower level is automatically selected
 - Select the value to add and click the button «»»
-
- The screenshot shows a software interface for creating a new taxonomy. On the left, there's a 'Properties' panel with fields for 'Name' (Type / Sous-type AR), 'Administration group' (administrateur_ar), and 'Description'. Below it is a 'Used dictionaries' panel containing 'Type AR', 'Sous-type AR', and 'Secteur'. At the bottom is a 'Dictionary values' panel listing items like 'AMPLIATION_AMM', 'BORDEREAU_REDEVANCE', etc., with a '»»»' button to the right. A blue arrow points from the text 'Click the level on which you want to add values' to the 'Dictionary values' panel. Another blue arrow points from the text 'The dictionary of the lower level is automatically selected' to the 'Used dictionaries' panel. A third blue arrow points from the text 'Select the value to add and click the button «»»' to the 'Dictionary values' panel.
- | Taxonomy values | |
|---------------------------|--------------------------|
| Type / Sous-type AR | ar_document_accompagnant |
| | AUTO_OUVERT |
| | 1 |
| | AUTRES_DOCU |
| | 1 |
| | BULLETIN_ANALYSE |
| | 1 |
| | CERTIF_BPF |
| | 1 |
| | CHEQUE |
| | 1 |
| | DOC_REDIGE_AR |
| | 1 |
| | DONNEES_ADMIN |
| | 1 |
| | PROFIL_PRODUIT |
| | 1 |
| ar_dossier_partie_dossier | DOSSIER_ASSEMBLE |
| | 1 |
| | DOSSIER_SUIVI |
| | 1 |
| | MODULE_1 |

To modify a taxonomy

- Click the taxonomy to modify in the window « Taxonomies »

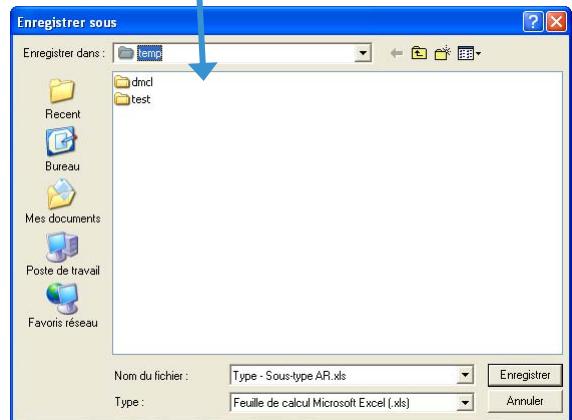
The screenshot shows the 'Taxonomies' window with the following interface elements:

- Taxonomies** list: A tree view of taxonomies. One item, "Type / Sous-type AR", is selected and highlighted in blue.
- Properties** panel:
 - Name : *
 - Administration group :
 - Description :
- Used dictionaries** panel:
 - A dropdown menu with a '+' and '-' button.
 - A list box containing "Type AR", "Sous-type AR", and "Secteur".
- Dictionary values** panel:
 - A list box containing "2", "3", "4", and "N.A."
 - Two buttons: '>' and '<'.
- Taxonomy values** tree view:
 - Type / Sous-type AR
 - ar_document_accompagnant
 - AUTO_OUVERT
 - 1
 - AUTRES_DOCU
 - 1
 - BULLETIN_ANALYSE
 - 1
 - CERTIF_BPF
 - 1
 - CHEQUE
 - 1
 - DOC_REDIGE_AR
 - 1
 - DONNEES_ADMIN
 - 1
 - PROFIL_PRODUIT
 - 1
 - ar_dossier_partie_dossier
 - DOSSIER_ASSEMBLE
 - 1
 - DOSSIER_SUIVI
 - 1
 - MODULE_1
 - 1

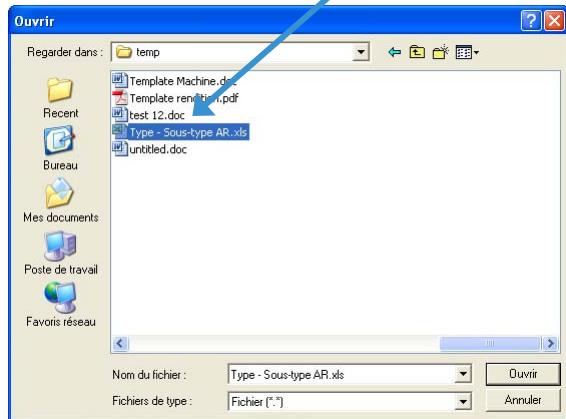
- To remove a value, select it and click the button «<<»
⚠ This action remove all values of the lower levels
- Click to cancel ongoing modifications since the last save
or on to save them

To Import / Export a taxonomy

- To export a taxonomy, click Export then select the target



- To import a taxonomy, click Import, select the file to import, then click "OK" to confirm



Registered table

EMC²

Registered table

- From this module form, you can manage registered tables from Documentum

D2 > Registered table

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete Import... Export... Elements without application

Registered tables banksubtypes

Name :* banksubtypes

Description :

Administration group :

Help on Date format : ?

Applications :

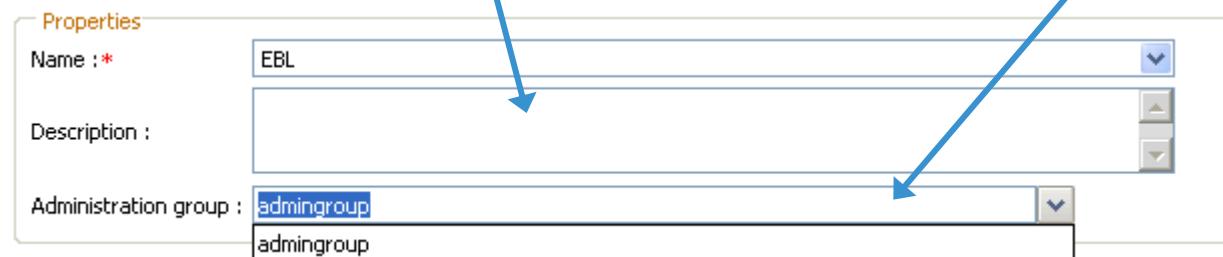
name	is_enabled	folder1
Agenda	1	Meeting - seminar documents
Analysis	1	
Back-to-office report	1	
Briefing document	1	
Business plan - Objective	1	
Change request release checklist	1	Documentation
Code of conduct	1	
Credential Checking Report	1	
Custodian agreement	1	Contracts and agreements
E-mail	1	Correspondence
Engagement letter	1	Contracts and agreements
Fax	1	Correspondence
Functional specification	1	Documentation
GMRA master agreement	1	Contracts and agreements
Guarantee	1	Contracts and agreements
Headquarters Agreement	1	Contracts and agreements
Host Country Agreement	1	Contracts and agreements
ISDA master agreement	1	Contracts and agreements

Registered table

- From the Name field, select a registered table to save into D2



- You can add a description and modify the administration group of the table

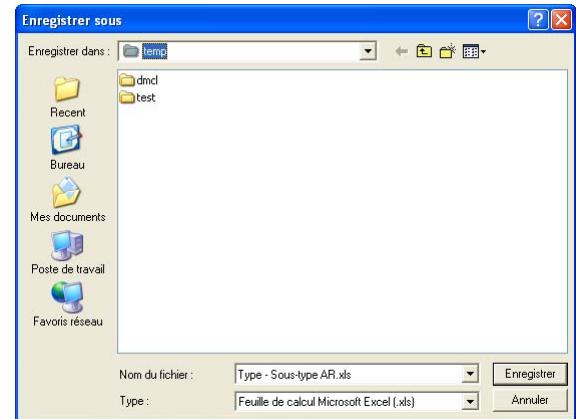


- Content from the selected table displays in a table grid. You can modify the values and delete rows from the table

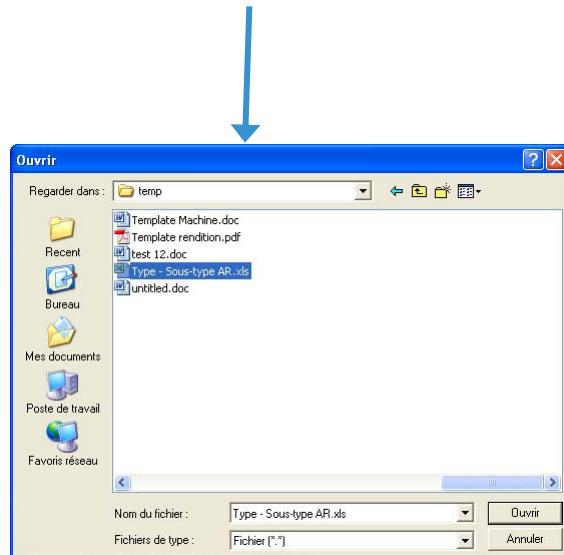
product	nomforgal	dosage	datcre	visacré	datmod	visamod
500524	Tablet	500MG	05/06/2007 18:26:19	NTR_CB		
500551	Granules for oral suspension		15/04/2003 19:55:54	CEDRES		
500551	Sachet	500MG	06/06/2007 16:22:58	NTR_CB		

To import / export a registered table

- Export a table to modify it from your local computer



- Once changed, you can import back into D2-Config the content of the table. Click import, select the file to import then confirm the import



Import/ Creation matrix content integration process

EMC²

The creation matrix

- The creation matrix makes it possible to define the type content to create, depending on a set of values entered by the user, during the creation process of a new document.
 - Several matrix can be created and affected depending on user groups. All matrix where criteria match will be applied.
 - The possible values of matrix come from dictionaries and can be saved in properties
 - Each line of a matrix defines for the document to create:
 - Its type*
 - Its associated property screen *
 - Its starting number of version *
 - Its properties inheritance
 - Its default value template
 - Its associated lifecycle
 - A workflow
- * mandatory

Creation matrix screen

D2 > Creation matrix

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete Add column 3.1.0

Matrix

New matrix Lié change_request

Creation Matrix

Name :* New matrix

Description :

Label fr : Qualité

Label en : Quality

Available for : Create Users group : test310_1

Hide inheritance tab

Default options

Properties inheritance : Content inheritance : VD structure inheritance :

Dictionary :

Type_i	Type	O2 config	Property pages	Version	Inheritance	Default values template	Lifecycle	Workflow
directives	directives	O2 Default	FP IE	1.0		3.1.0	QA LifeCycle	Test WF
instructions	instructions	O2 Default	FP IE	1.0		3.1.0	QA LifeCycle	Test WF
procedures	procedures	O2 Default	FP IE	1.0		3.1.0	QA LifeCycle	Test WF

- - +

EMC²

To create a new creation matrix

- Click  then enter the name, a description and a label

Creation Matrix

Name :*	New matrix
Details :	<input type="text"/>
Label fr :	<input type="text"/>
Label en :	<input type="text"/>

Up/Down arrows for label selection.

- Dans In the combo, select the operating mode of the matrix (Creation et/ou import, linked document)

Available for :	<input style="border: 1px solid blue; padding: 2px 10px; background-color: white; color: blue; font-weight: bold; font-size: small;" type="button" value="Create & import"/>	Users group :	<input type="text" value="test310_1"/>
-----------------	--	---------------	--

- Select the associate user group. If the matrix is only dedicated to linked documents, check the box and it will not appear anymore in the document creation window

* Mandatory

EMC²

Create a new creation matrix

- You can choose to remove the « Inheritance » tab from the matrix in order to accelerate to creation/import process.
 - In that case any inheritance could be applied to the document creation or import
 - To do so, check the following box
- [Hide inheritance tab :](#)
- When the « inheritance » is enabled, you can select default options by clicking or not on corresponding checkboxes.
 - These options set by default may be changed by the user when creation process.

Default options			
Properties inheritance :	<input checked="" type="checkbox"/>	Content inheritance :	<input checked="" type="checkbox"/>
VD structure inheritance :	<input checked="" type="checkbox"/>		

To create a new creation matrix

- Select the dictionary* that will define the values

Dictionary :	Type_1	X	Type	O2 config	Property pages	Version	Inheritance	Default values template	Lifecycle	Workflow	-	-	-	+
Properties :														
directives	directives	O2 Default	FP IE		1.0			3.1.0	QA LifeCycle	Test WF				
instructions	instructions	O2 Default	FP IE		1.0			3.1.0	QA LifeCycle	Test WF				
procedures	procedures	O2 Default	FP IE		1.0			3.1.0	QA LifeCycle	Test WF				

- Select the property that will store the values (if needed)
- Select other values of the line : Values*, Type*, Properties dialogs*, Version*, Properties inheritance, Default value template, Lifecycle, Workflow
- For the version, it makes it possible to enter a version label ex : 1.0,Draft
- All these configurations will be applied on the document at its creation or import
- The initial selected state of the lifecycle makes it possible to set the a_status but it does not execute the configured actions of the state

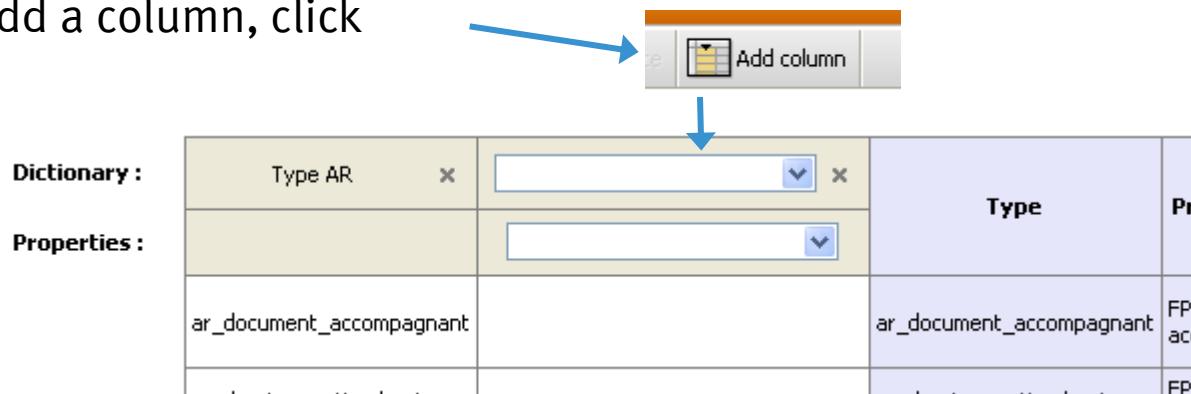


Properties parts of the default value template are not initialized, if they are not included into the property page for the corresponding object type. For them to be taken into account while remaining invisible to the user, these properties must be included and hidden into the property page.

* Mandatory

To create a new creation matrix

- To add a column, click



A screenshot of a software interface for creating a new creation matrix. On the left, there are two sections: 'Dictionary:' and 'Properties:'. The 'Dictionary:' section contains a table with one row, where the first column is 'Type AR' and the second column is a dropdown menu. The 'Properties:' section contains a table with three rows, where the first row has columns 'Type' and 'Properties', and the second and third rows have columns 'ar_document_accompagnant' and 'FPR acc...'. A tooltip with the text 'Add column' and a grid icon is shown above the second column of the 'Properties:' table.

Dictionary :	Type AR		
Properties :		Type	Properties
	ar_document_accompagnant		FPR acc...
			FPR acc...
			FPR acc...

- To add a new line, click « + »



A screenshot of a software interface for creating a new creation matrix. On the left, there are two sections: 'Dictionary:' and 'Properties:'. The 'Properties:' section contains a table with six columns: 'Type', 'Property dialogs', 'Version', 'Inheritance', and 'Lifecycle'. The first row has values 'ar_retour_autorites', 'ar_retour_autorites', 'FPR AR Retour Autorités', '0.1', 'HRT ar retour autorites', and 'CDV G2D2'. To the right of the table are two buttons: a minus sign '-' and a plus sign '+'. A blue arrow points from the text 'To add a new line, click « + »' to the plus sign button.

Dictionary :	Type AR	Type	Property dialogs	Version	Inheritance	Lifecycle
Properties :	ar_retour_autorites	ar_retour_autorites	FPR AR Retour Autorités	0.1	HRT ar retour autorites	CDV G2D2
	-	+				

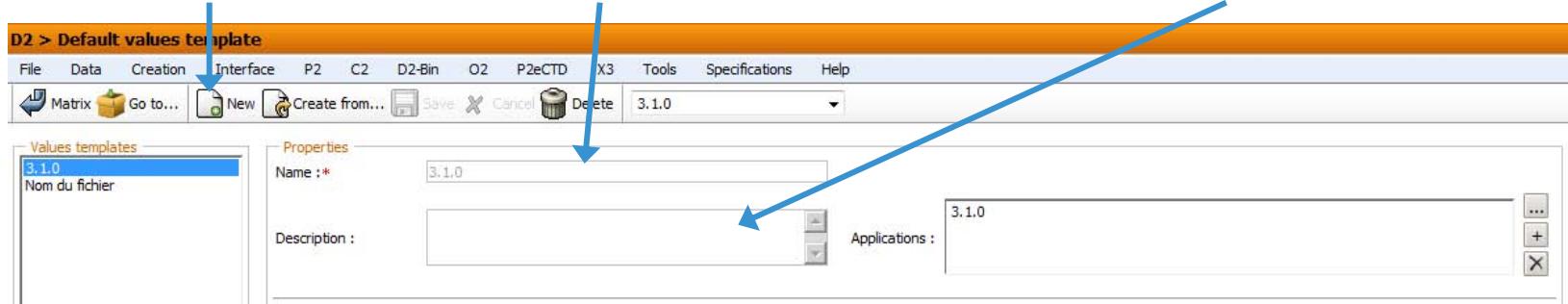
- Click  to save the matrix
- Click  to cancel ongoing modifications since the last save

Default values template

EMC²

To create a new default values template

- The default value templates makes it possible to define a starting value for properties at time of a document creation
- Click new, then enter a name to the template and a description



- Then select a property in the list and enter its default value

Attributes*	Default values
annee_publication	1999

Arrows point to the "annee_publication" attribute in the first column and the "1999" value in the second column. There is also an arrow pointing to the plus sign (+) button in the bottom right corner of the table.

- To add a new one, click « + »
- To remove a value, click it then click « x »
- You can use the key words « \$USER » to select the connected user, « \$TODAY » for the date of the day, \$NOW for the date and hour, \$ALIAS for the alias and \$dqlvalue("⟨DQL⟩") for a DQL query

Default values template and imported files

- When content export, if you use the \$FILENAME in a default value template, you will be able to store the file name into a property other than « object_name ».

Properties*	Default values ?	
title	\$FILENAME	+ x

- Then, it will be necessary to combine this template with a matrix of content import and/or matrix of content creation.
- Into D2-client, when document import, the name of imported file will be stored into the property specified in the template.

Mail attachment

EMC²

Mail attachment configuration

- Within this module, it is possible to control e-mail import. Thus, you can allow whether or not, import of attachments and also specify different rendition formats.
- To import attachments, check the following box.
- Also, you can choose to maintain the original format.
- And/or to associate it with an additional rendition checking on the following box.

Options list of import mails attachments

Import attachments:

Keep initial mail format:

- In this case, it will be necessary to specify
- You can also choose to store whether or not, the attachments when creating a new rendition.
- In case they are stored, specify if needed, formats to exclude.

Excluded attachment document format : Formats in database :

- a-LAW Sound
- Acrobat PDF
- Acrobat PDF
- Acrobat PDF Text
- Acrobat XPDF
- Active Server Pages (.asp)
- Advanced Binary Presentation
- Advanced Streaming File
- Advanced Streaming Metatile
- AIFF Sound

Excluded formats :

- [Empty list]

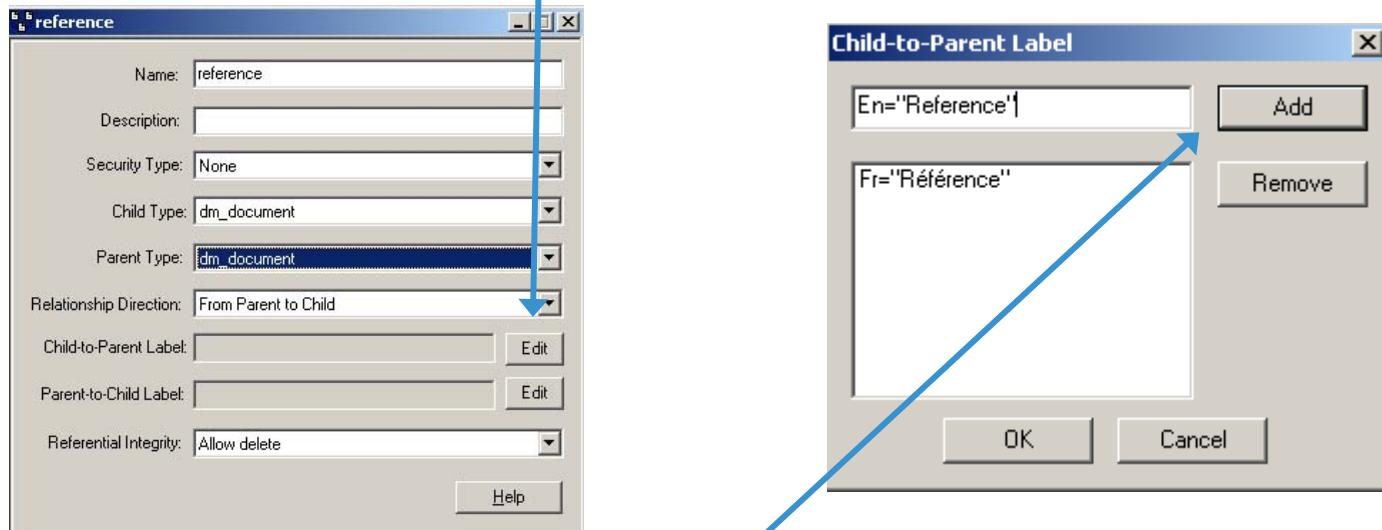
- To enable this con
and associated with the email import matrix, as well as its contexts.

Relations

EMC²

Relations

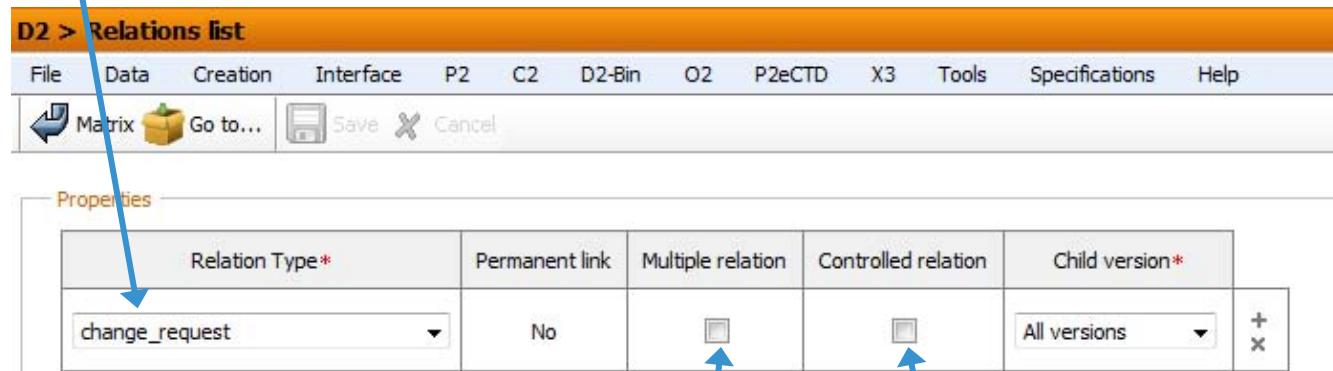
- Relations are created within Documentum Application Builder.
- To add labels to relations in various locals, select the relation way of the relation, and then, valid its label:



- Enter the label to use in each language, according the following process :
Local="Label"
- Add labels for the two relations types and check in the DocApp.
- Relations labels are considered in D2, while properties display.

Relations

- The relation screen allows you to select relations that will be proposed to users
- Select a relation in the list



- If it is a multiple one (one -> many), check the box
- If you want to forbid its removal or its creation outside of the properties dialog (controlled relation), check the box

Relation Type*	Permanent link	Multiple relation	Controlled relation	Child version*
liste_de_destinataires	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	All versions
code_dossier	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	All versions

To add a relation,
click « + »

To remove a relation,
click « X »

Relations

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

The screenshot shows the 'D2 > Relations list' interface. In the top navigation bar, the 'Properties' tab is selected. Below it, a table displays properties for a relation type. The first column is 'Relation Type*', containing 'change_request'. The second column is 'Permanent link', with the value 'No'. The third column is 'Multiple relation', with an unchecked checkbox. The fourth column is 'Controlled relation', with an unchecked checkbox. The fifth column is 'Child version*', which has a dropdown menu set to 'All versions'. There are also '+' and '-' buttons next to the dropdown.

Relation Type*	Permanent link	Multiple relation	Controlled relation	Child version*
change_request	No	<input type="checkbox"/>	<input type="checkbox"/>	All versions

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 :

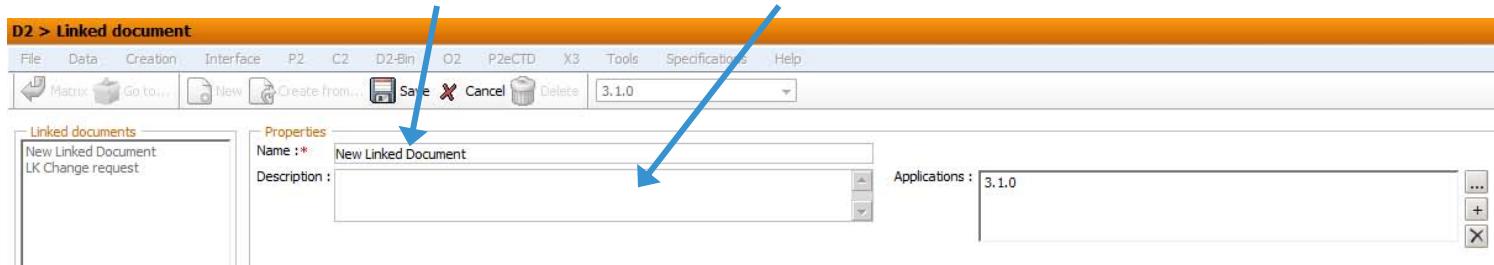
- « All versions » : each version of the child document will be linked to the parent document
- « Current » : only the current version of the child document will be linked
- « Unique version » : only the child document version used during the creation of the relation will be linked, the previous versions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

Relations

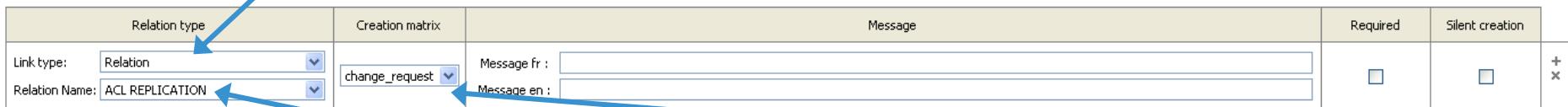
- In addition to the parameter setting carried out via “Permanent link” and “Child version”, the management of the versions is facilitated by two display filters available into D2-Client :
 - In the case of a parent document having a relation towards multiple versions of a child document (Child version = « 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 make 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

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*



Relation type	Creation matrix	Message	Required	Silent creation
Link type: Relation	change_request	Message fr : <input type="text"/> Message en : <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relation Name: ACL REPLICATION			<input type="checkbox"/>	<input type="checkbox"/>

- 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 « + »

Mail

EMC²

To configure a mail server

- Protocol to send emails / check for SSL
- Name of email server
- Port to send emails
- Account / password for user who will send emails
- Address / name for sending email
- Reception Protocol for emails/ SSL
- Name of email server
- Reception port for emails
- Account and password for account that will accept tasks
- Account and password for account that will reject tasks

D2 > Mail configuration

Mail server

Protocol :	smtp	Using SSL :	<input type="checkbox"/>
Server :	C6	Port :	<input type="text"/> (not necessary if the used port is 25)
Login :	dmadmin	From address :	<input type="text"/>
Password :	*****	From name :	<input type="text"/>

Mail reception server

Protocol :	pop3	Using SSL :	<input type="checkbox"/>
Server :	C6	Port :	<input type="text"/> (not necessary if the used port is 110)

Accepted task account

Login :	accept
Password :	*****

Rejected task account

Login :	reject
Password :	*****

To configure a mail server : external task

- If you used workflows, you can also manage emails sending for external tasks.
- An email can be sent to the user in case of assigned task issue, (as mentioned in the label below).

- Administration of errors into external task inbox

Send back mail on task error :

(Send back a mail to sender if the task associated to the mail is not found. We do not recommend to activate this option if you use Lotus Domino Server or if you have problem of duplicate mail into the inbox)

Active mail history :

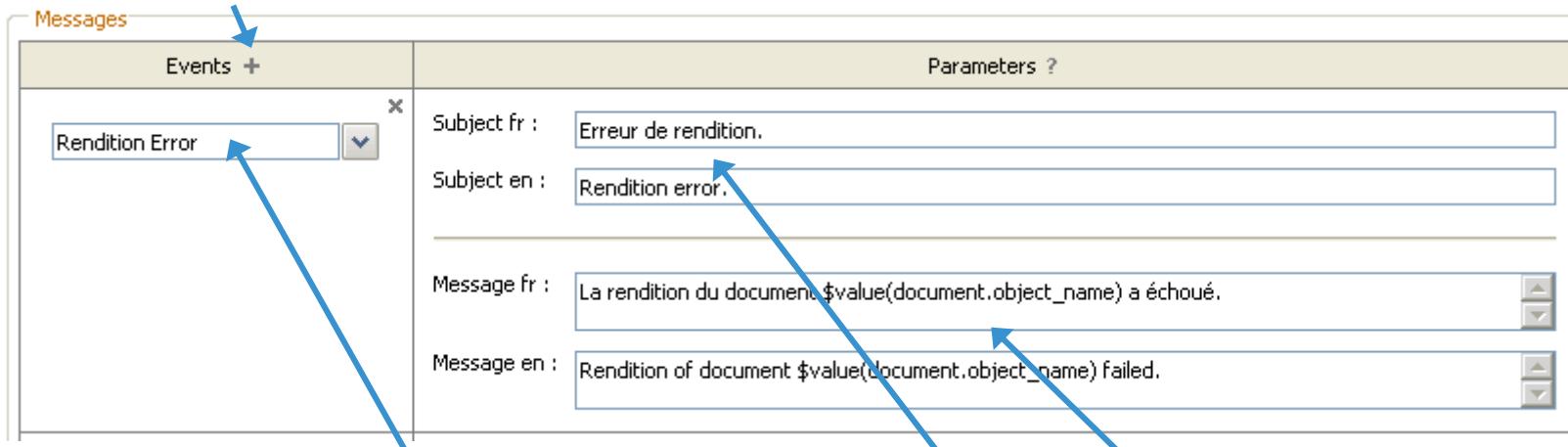
(If you have errors of duplicate mail into the inbox and you have activated the option above, you must turn on this option)

- In case of error, if you choose to send back an email, you can enable an historic to view all emails including duplicates ones.

To configure messages of events associated to emails

- It is possible to change the default messages associated to events sent by emails

To do that, always on the mail server configuration,
click « + » to add an event



- Select the desired event and enter the new subject / message
- You can use \$value to re use settings from :
 - \$value(document.property_name) for a property of a document
 - \$value(task.subject) or \$value(task.message) for subject/message of the task
 - inbox to insert a clickable link towards the inbox
 - Click here to insert a clickable link towards the inbox document

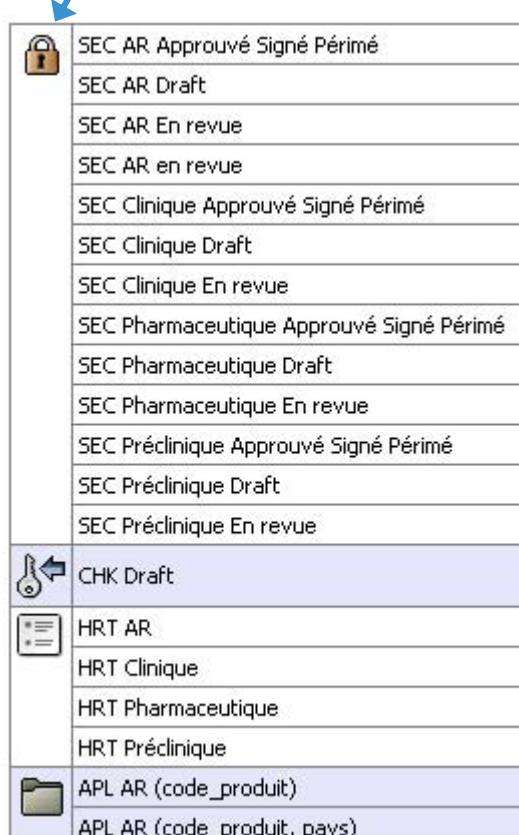
Configuration modules

D2 4.0

Configuration screen for the repository

- The configuration layer allows your business rules to be implemented in the document database by the simple setting up of:
 - Value dictionaries
 - Autolink patterns
 - Creation rules for your different document types
 - Properties dialogs
 - Dynamic security models
 - Lifecycles
 - Workflows
- Configuration is carried out using screens and needs no developer skills. The configuration is exportable or can be saved (and versioned) in the repository in order to be :
 - Imported again later
 - Archived
 - Imported in a new repository (ex: from test to production)
- Only document types and relations have to be done into Documentum Application Builder

To create a configuration

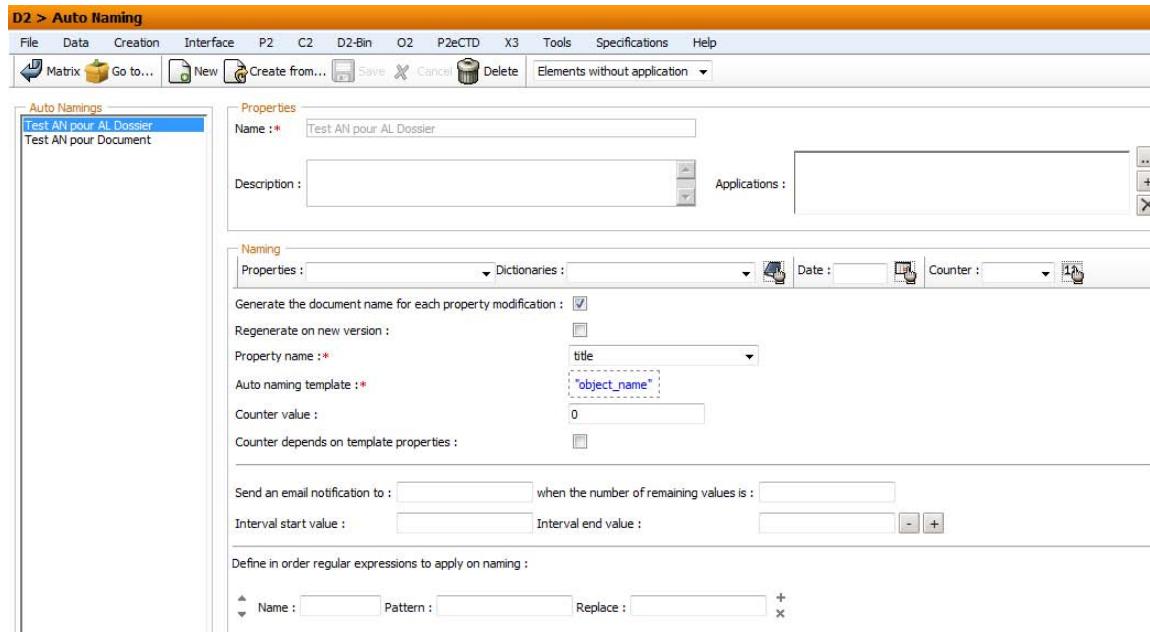
- To create a new configuration, click the corresponding icon or on the following button
- You will be automatically put on the screen of the desired configuration
- The possible icons are:
 - Security models
 - Audit events
 - Checkin configuration
 - Checkout configuration
 - List of properties inheritance
 - Lifecycles
 - autolink models
 - Linked documents
 - Automatic auto naming models
 - Rendition servers
 - Properties dialogs
 - Templates
 - Workflows
 - Mailing list
 - Lifecycle batch

Auto naming and Autolink

EMC²

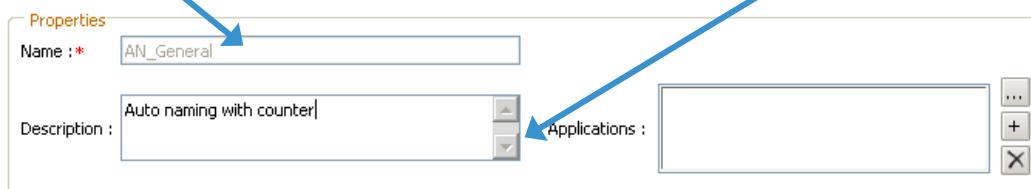
Auto naming

- The auto naming makes it possible to fill in automatically a property (by example object_name)
- The auto-naming can includes several components : properties values, date, counter, constant text.
- If you insert a counter, you can define the starting value of it, as well as multiple ranges of values to be used
- These auto naming rules are applied to contexts

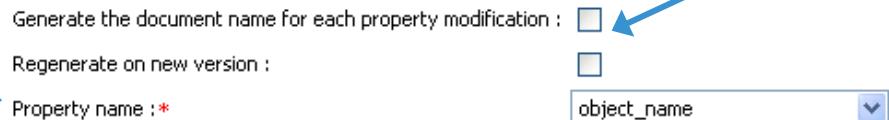


To create an auto naming rule

- Enter the name of the new rule and its description



- Select the property to fill and check the box to generate it at each saving



- The attribute can be also regenerated at each new version of document
- To add the value of a property, select it in the list

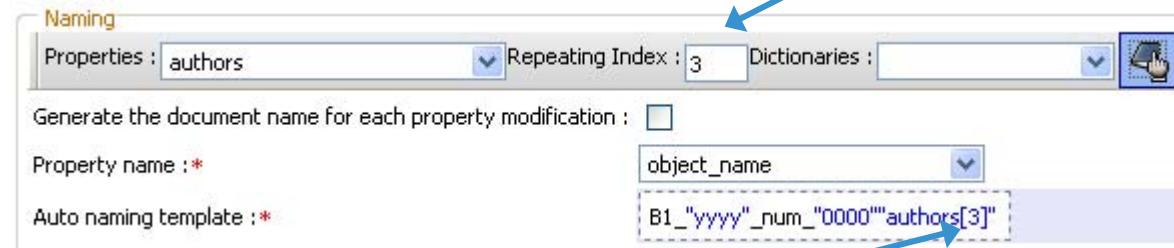


- Then select a dictionary and a language or an alias
- Click the hand to insert the value of the property in the rule

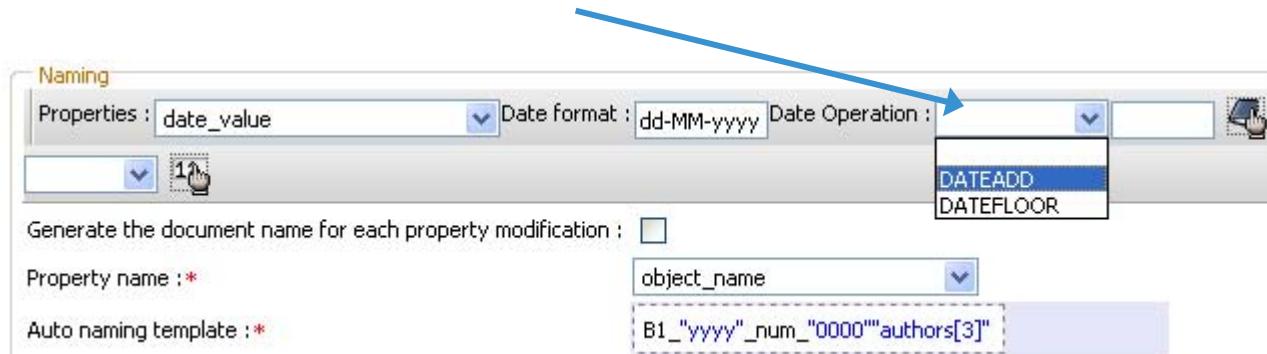


To create an auto naming rule

- You can in case of repeating properties, choose the index position of the value to use for the naming



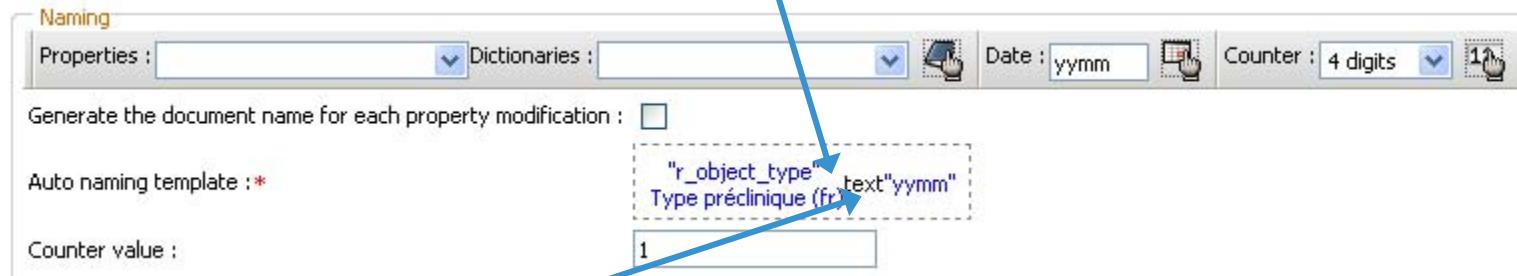
- The placeholder shows you the input index value between brackets in the template
- It is also possible to use date functions, as in DQL in the template for auto naming



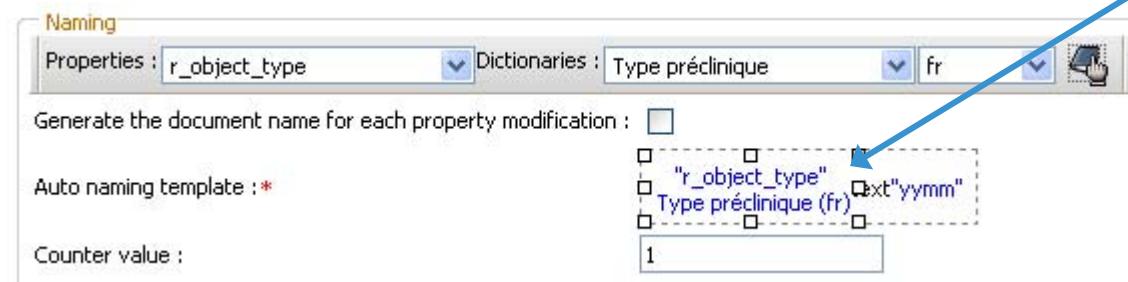
- DATEADD: {year|month|week|day}, followed by an 'integer' value
- DATEFLOOR: {year|month|day}

To create an auto naming rule

- To insert constant text, select the position where the text has to be inserted with the mouse directly into the template



- Then enter the text
- To remove a property or a counter or a date or some constant text, select it with the mouse



- Then click « del » on the keyboard

To create an auto naming rule

- D2 makes it possible to generate a count by set of key values of the properties of the template
- By example to generate a count by subset of (type, subtype), check the box

Generate the document name for each property modification :

Property name :*

Auto naming template :* "sous_type"
Type AR (fr) - Sous-type AR (fr)

Counter value :

Counter depends on template properties :

- The previous template will generate the following count values depending on values of properties type and subtype :

type	Sub type	count
AR	doc_1	1
PSUR	doc_1	1
PSUR	doc_2	1
PSUR	doc_1	2
PSUR	doc_1	3
AR	doc_2	1
AR	doc_2	2
AR	doc_1	2

To create an auto naming rule

- You can, if you have inserted a counter, define ranges of values to be used

Send an email notification to :	cm@c6.com	when the number of remaining values is :	10
Interval start value :	100	Interval end value :	500
Interval start value :	600	Interval end value :	800

- You can define an email address that will be used to send an email

Send an email notification to :	cm@c6.com	when the number of remaining values is :	10
Interval start value :	100	Interval end value :	500
Interval start value :	600	Interval end value :	800

- when the number of remaining values will reach this value
- Click « + » to add a range and on « - » to remove one

Autolink

- The autolink makes it possible to automatically place your content according to the contexts on which they belongs
- To do so, you can configure several autolink templates corresponding to the various sets. These templates will be able to have several placements and in this case, the document which would be put in first, will be linked to the other ones
- Each placement is a path in the repository. If the path does not exist, the folders will be automatically created
- If several templates match with a document, only the first one found will be applied. This order can be set up in the main configuration matrix
- D2 makes it possible to check two autolink templates for the same context

Autolink screen

D2 > Auto link

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete 3.1.0

Auto links

eCTD
PL CR
PL Default
PL P2
STF

Properties

Name : * eCTD

Description :

Label for undefined property : Undefined

No empty folder on the extremity :

Link only the first value of the repeating properties :

Link repeating properties between themselves :

Link all versions to current version folders

Path

Properties : Dictionaries :

eCTD / + /

"t_creation_date"
YYYY

dm_cabinet dm_folder

/ SEC Générale SEC Générale

Home cabinet :

Define in order regular expressions to apply on directory names :

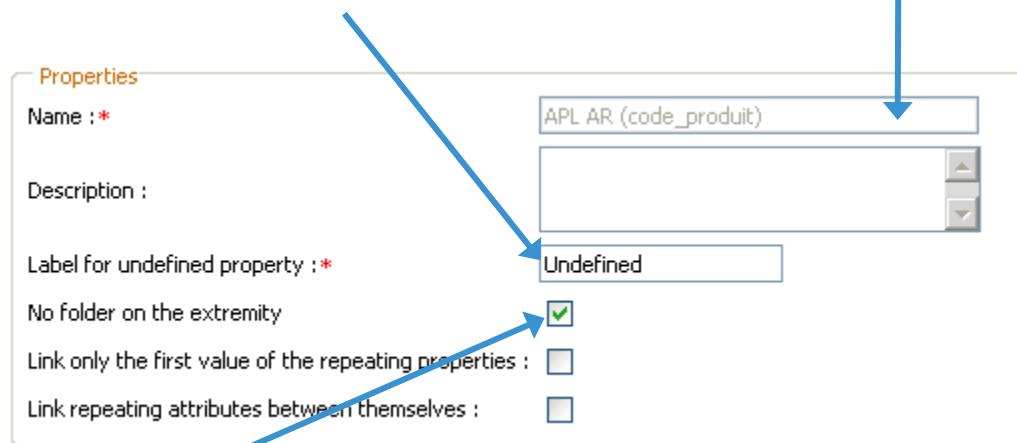
Name : Pattern : Replace :

The screenshot shows the 'Auto link' configuration interface. It includes a toolbar with standard file operations like Matrix, Go to..., New, Save, and Delete. The main area has tabs for 'Properties' and 'Path'. In 'Properties', fields are provided for Name (set to 'eCTD'), Description, and various checkboxes for linking undefined properties, empty folder extremities, repeating properties, and multiple versions. In 'Path', a hierarchical structure is defined: 'eCTD' at the root, followed by a folder named 't_creation_date' containing 'YYYY', then 'dm_cabinet' and 'dm_folder' sub-folders, and finally two 'SEC Générale' leaf nodes. A 'Home cabinet' checkbox is also present. Below the path tree, there's a section for defining regular expressions to apply on directory names, with fields for Name, Pattern, Replace, and an add/delete button.

To create an autolink template

- Click  then enter the name of the new autolink template
- Enter the name of the folder to be created if the property is not filled

*Ex : you have defined the path : /Property_1/Property_2/Property_3
If Property_1='A' Property_2='B' and Property_3 is not filled
the created path will be : /A/B/Undefined/Document*



- If you check this box and that the last property of the path is not filled, the folder will not be created and the document will be put in the upper folder

In the case of the example on the top the path will be: /A/B/Document

To create an autolink template

- The change of document properties can cause a change in the placement of the current version of the document.
 - Also, in order to move all versions of a document, into the new location of the repository, you must check the following box:

Label for undefined property :

Link only the first value of the repeating properties :

Link all versions to current version folders

- By checking this box, all versions af a same document will be moved into the same location as the current version of the document.
 - If the option is not activated only the current version will be moved when properties change. The others versions of the document remain positioned in their original location.

To create an autolink template

- The two other check boxes make it possible to manage « repeating » properties

Properties

Name :*	APL AR (code_produit)
Description :	
Label for undefined property :*	Undefined
No folder on the extremity	<input checked="" type="checkbox"/>
Link only the first value of the repeating properties :	<input type="checkbox"/>
Link repeating attributes between themselves :	<input type="checkbox"/>

- The following spreadsheet shows an example of the possible combinations

Property_1	Property_2	Property_3	No checked boxes	Check box 1 checked	check box 2 checked
A,B	C,D	E (Single)	/A/C/E /A/D/E /B/C/E /B/D/E	/A/C/E	/A/C/E /B/D/E
A,B	C,D	E (Repeating)	/A/C/E /A/C/Undefined /A/D/E /A/D/Undefined /B/C/E /B/C/Undefined /B/D/E /B/D/Undefined	/A/C/E	/A/C/E /B/D/Undefined

To create an autolink template

- Enter your paths
Select a property and eventually a dictionary, an alias or a language



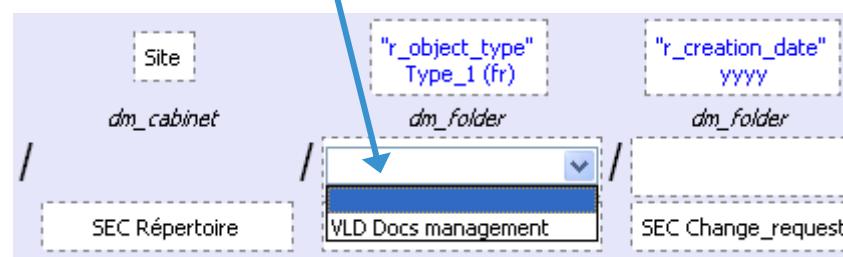
- Then click « the hand » to insert
- You can add a new property or some text.
Click the place where you want to insert it and enter some text



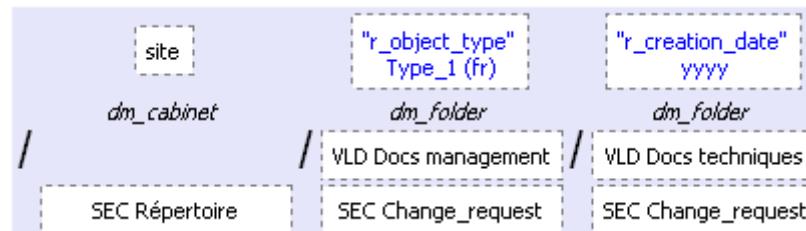
- or select another property and click again on the hand to insert it
- You can in case of repeating properties, choose the precise index position of the value to use for the naming, such as in auto naming.

To create an autolink template

- You can set up an association between existing default values from the different level on your autolink template.
- Place yourself on the right level where values must be added, then select the element to associate



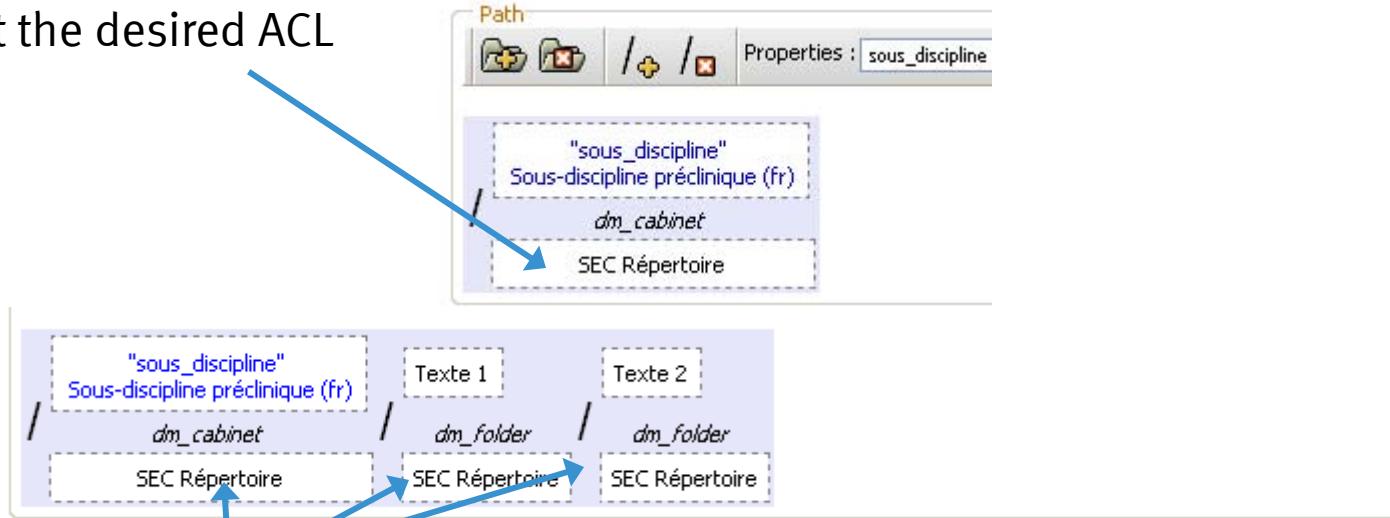
- Default values can be associated at every level of the tree directory



- While creating a document, these values will automatically increment into the properties of the elements

To create an autolink template

- You can select an ACL template for the security of this folder
Select the desired ACL



- You have to select one for every folder
- If you want to put it in a personal folder (your home cabinet), check the box

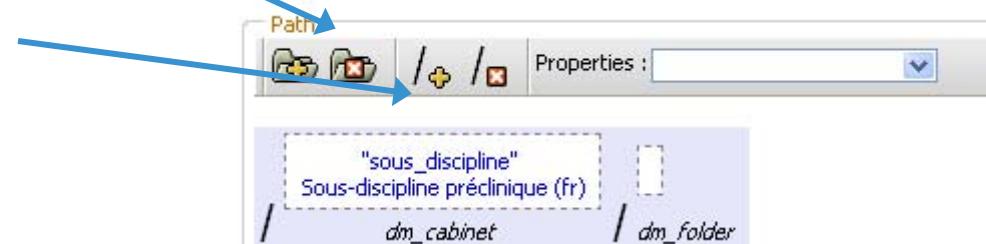


To create an autolink template

- To add a new folder click « /+ »



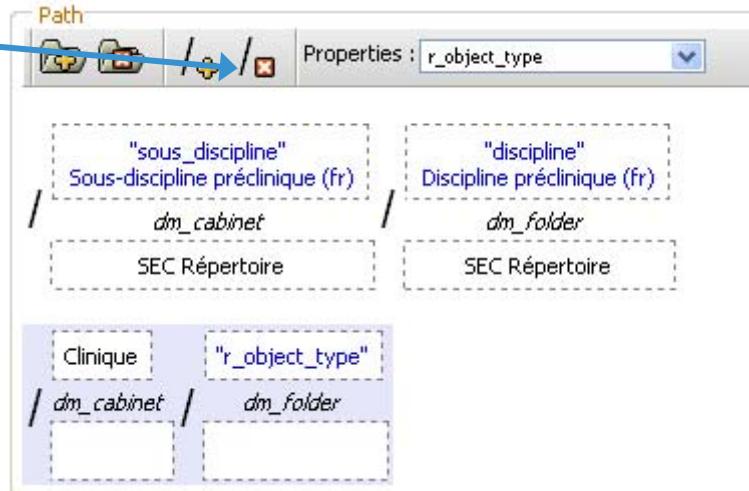
- To remove a folder click « /x » (remove the last one of the path)



- To add a new path « + »

- To remove a path, click one folder of the desired path and click « x »

Within the matrix combine the autolink with a context. It is preferable to select a set which does not contain filters on groups.



autolink and browsing optimization

- Depending on the client system configuration, it can be highly time-consuming to list a folder where the number of items exceed 1000 objects.
- To avoid any limitation due to this performance issue, we strongly advice you to use the D2 autolink module in such a way that the number of documents per folder is limited up to 500.

Autolink and Auto naming

- Regulars expressions can be created to control the auto naming or autolink output. They are chained actions on characters output,
- Put a name defining the action behind the expression.
- Enter one character or the expression (the pattern) to match in the input string for replacement
- And the replacement string

Define ordered regular expressions to apply on naming :

Name : <input type="text" value="underscore"/>	Pattern : <input type="text" value="_"/>	Replace : <input type="text" value="-"/>	<input type="button" value="+"/> <input type="button" value="x"/>
Name : <input type="text" value="type1"/>	Pattern : <input type="text" value="procedures"/>	Replace : <input type="text" value="Procédure"/>	<input type="button" value="+"/> <input type="button" value="x"/>

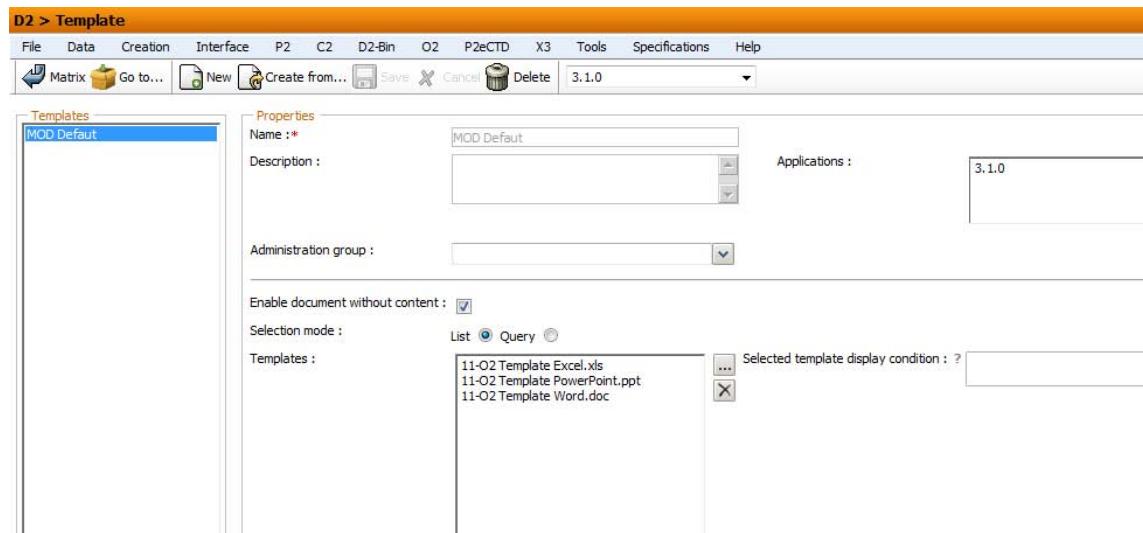
- Order, Add rules or Delete them using various icons.
- The position of the regular expressions definition can be essential to match and replace the string or character
- By example, you can remove all “_” from the output names generated from an auto naming or autolink template and convert it to an “-”, and continue.

Document template

EMC²

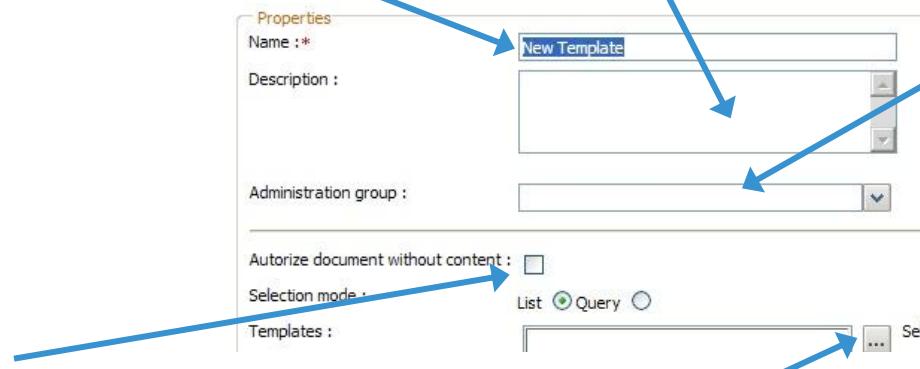
Template lists

- 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:

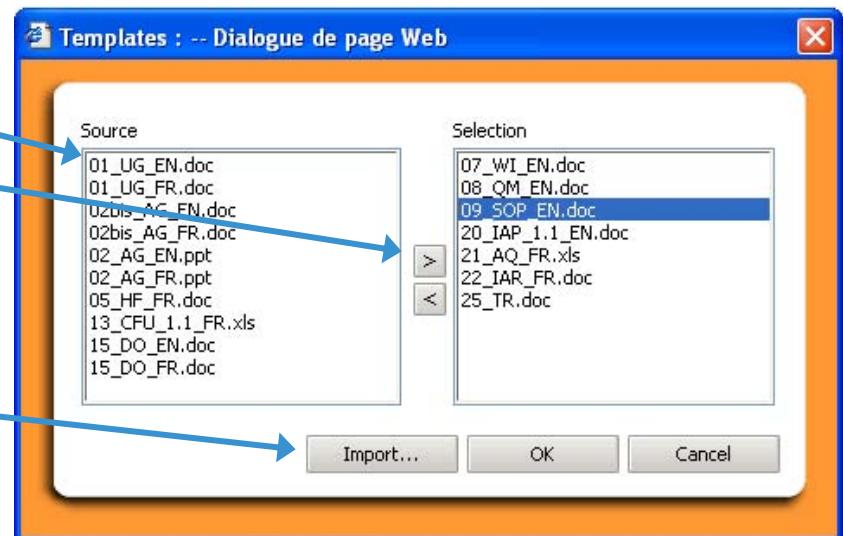


To create a template list

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

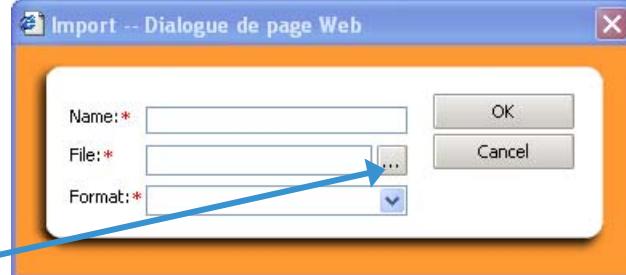
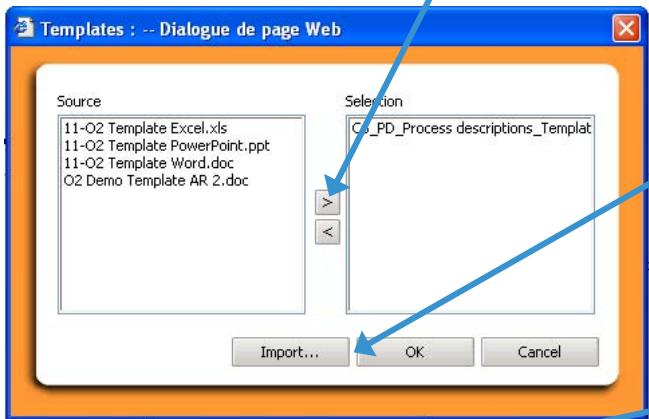


- Check the box if you authorize the document without content
- To add a template in the list, click « ... »
- Select a template
- Then click « > »
to add it in the list
- You can also import some
from your disk

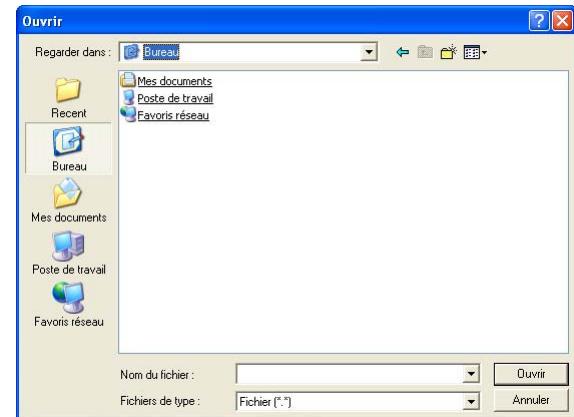
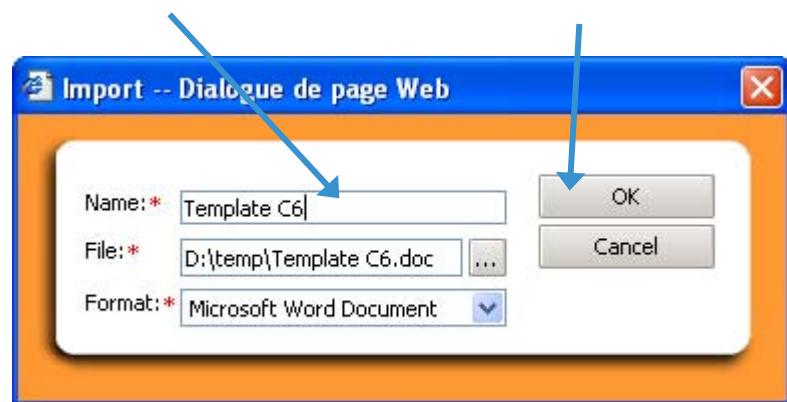


To create a template list

- Select one and click « > » or click « import »

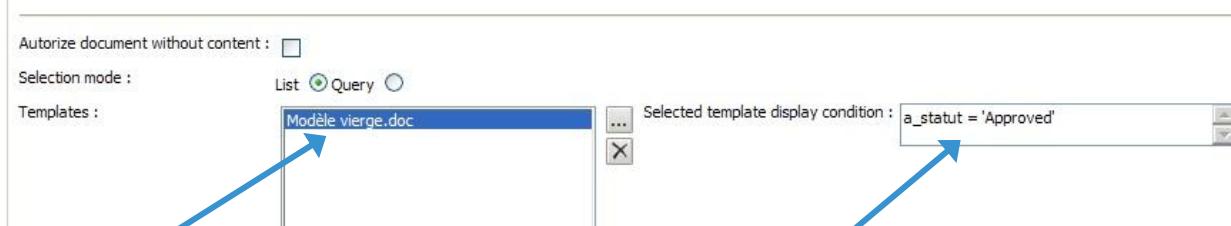


- Click « ... »
- Select the file to be imported
- Fill the name and click « OK » to add it to the list



To create a template list

- You can enter a condition (in DQL) on the display of the template



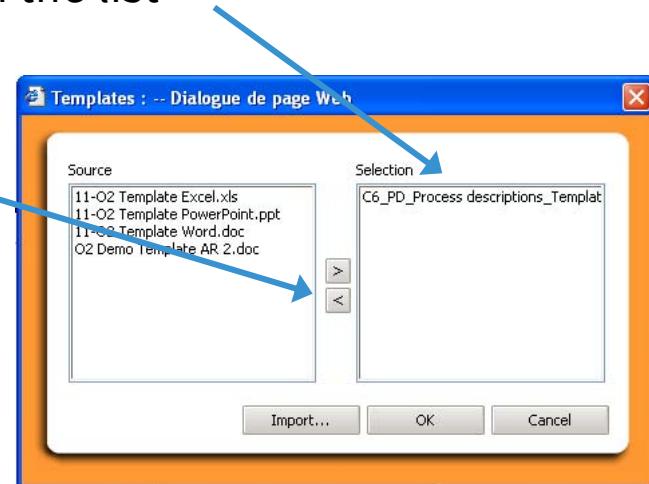
- Select the template to be able to enter the condition
- To use the value of a property of the selected document : \$value(a_statut)
- To remove a template from the list, Select it in the list
- Then click « < »
- Or select it in the list of the main screen

Administration group : administrateur_ar

Autorize document without content

Templates :

AR Linked document 2.doc
AR Linked document 3.doc
AR Linked document.doc
Modèle vierge.doc
Template In Vitro.doc



- And click « x »

To create a template list

- It is possible to use your own document template types in order to be able to manage lifecycle and workflow on them
- Check the box

Autorize document without content :

Selection mode : List Query

Qualification : ?

```
mes_templates where a_status = 'Approved'
```

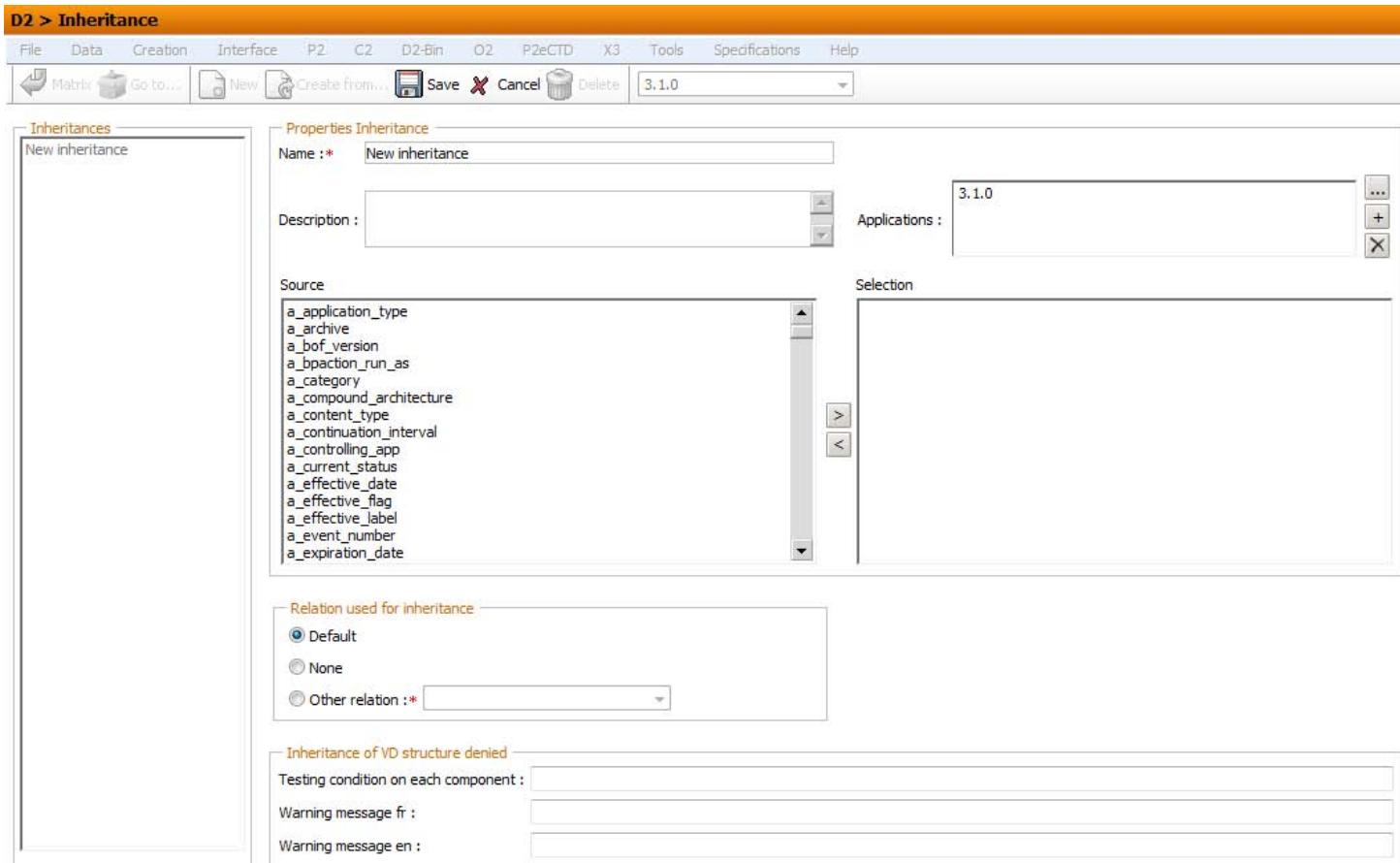
- Enter the condition
- The proposed list for the template selection will display the property 'object_name' of returned templates

Inheritance component

EMC²

Properties inheritance

- Some properties lists can be defined in order that a created document can inherit automatically some values from an existing document. These lists will be assigned to contexts.



To create a properties inheritance list

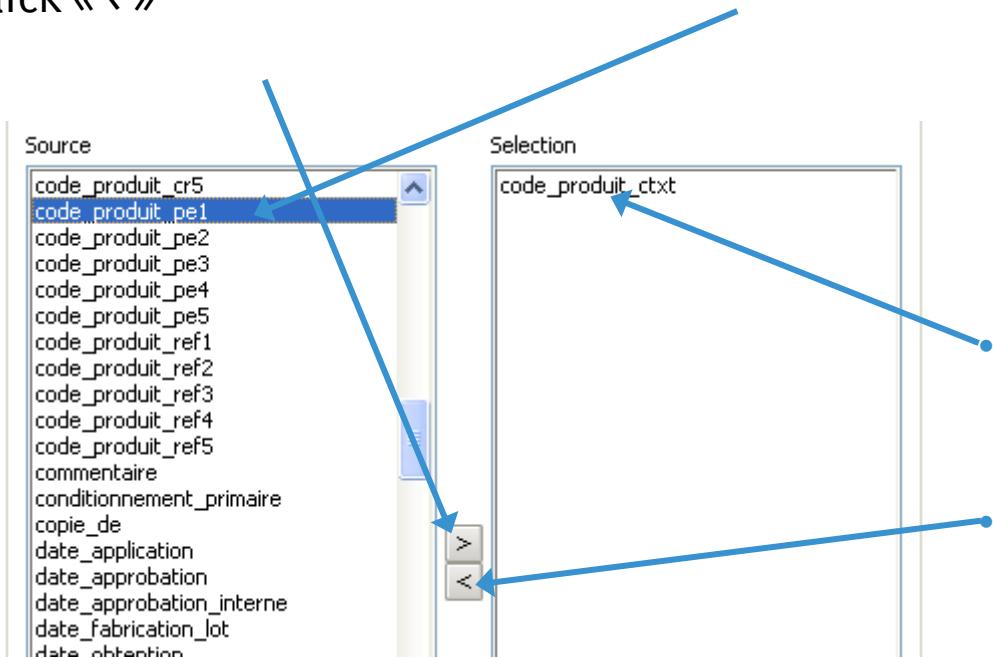
- Click  and enter the name and its description

Properties Inheritance

Name : *

Description :

- To add a property in the list, select it in the source list (or double-click it)
- Then click « < »



To remove one,
select it
in the selection list

Then click « < »
or double-click it

To create a properties inheritance list

- You can also select the relation type to use when relations set up:

- COPY_OF
- No relation
- Select a relation among existing ones



- The inheritance of a structure VD can be prohibited. To do this, it is only necessary to determine the condition to test on each component of the VD.

Inheritance of VD structure denied

Testing condition on each component : r_object_type like 'submit%'

Warning message fr :

Warning message en : Vous ne pouvez pas hériter de cette structure

- Then, add an informational message that appears when an inheritance is performed, within D2-client.

Searches

EMC²

Search

- This screen allows you to configure global search properties

D2 > Search

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... Save Cancel

Properties

Dictionary for type labels : Type_1 Alias/Locale : auto

admingroup
test300_1

Groups allowed to create public searches :

Search Engine

Maximum results returned by search (0 = unlimited) : * 0

Maximum number of asynchronous searches in a user session (0 = unlimited) : * 10

Enable full text search :

Quick search on all versions (default is CURRENT) :

Indexing engine choice : Documentum Fast Documentum xPlore OpenSearch Compatible

Xplore engine options

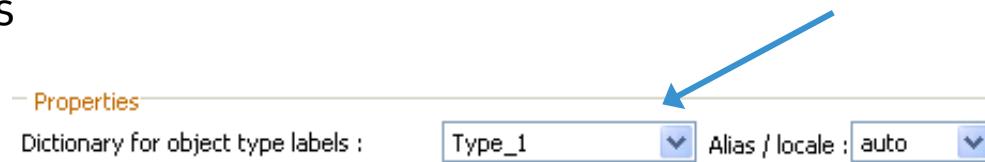
Use Xplore for all searches (even the one without full-text criteria) :

Enable Facets :

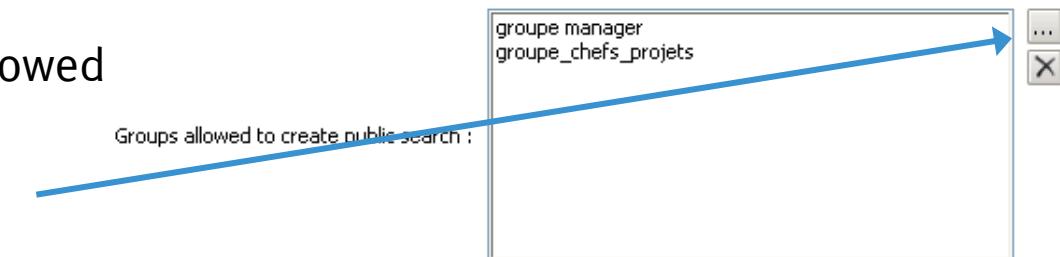
Maximum number of Facet : 5

Search

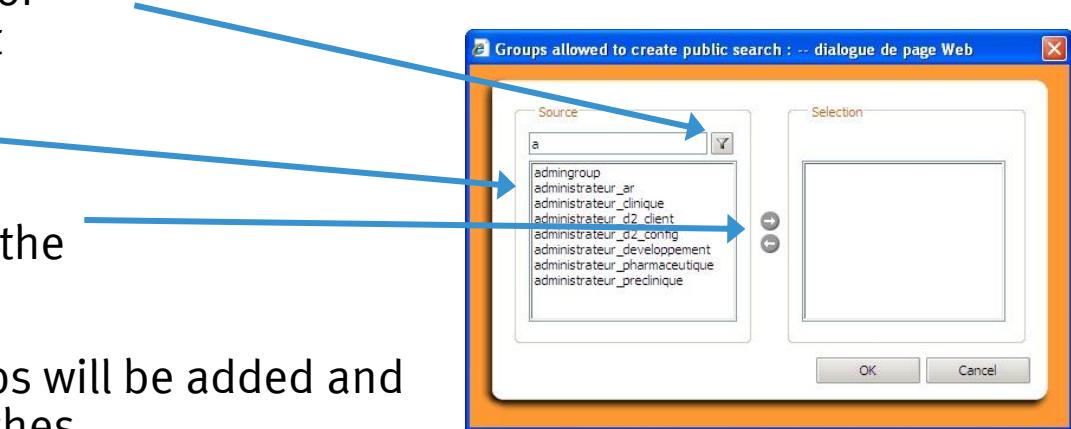
- Select a dictionary and set the alias or language to add specific labels to objects types



- You can set a list of groups allowed to save public searches
- Click « ... » to add groups

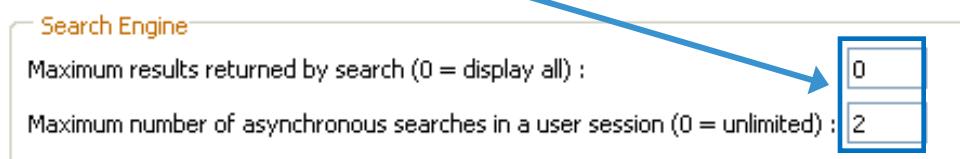


- Use the filter to refine the list of groups after inputting the first letters of it
- Select the desired groups
- Click the arrow to put them in the selection list
- Then click «Ok» and the groups will be added and allowed to create public searches



Search: Engine setting

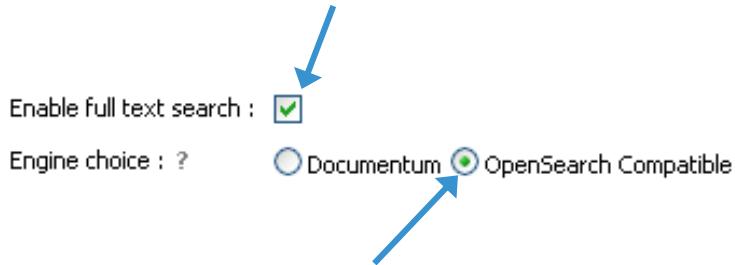
- You can restrict the number of returned results and asynchronous searches.
- To do so, input correct integer values to calibrate these features to your needs and optimizations.



- The number of asynchronous searches is by default restricted to:
 - 350 by repository
 - 1000 for all repositories
- This restriction can be modified in the folder dfc.properties. To do this, it is necessary to modify following parameters:
 - ***dfc.search.max_results = 1000***
 - ***dfc.search.max_results_per_source = 350***

Search: Engine setting

- Full text search engine can be activated or not



- In case of activation, you have 2 engines currently supported



Only one engine can be set up at a time, but OpenSearch options will be kept as, if de-activated for the Documentum full text. This way you will not lose your setting. Both engines are depending on an external engine installation.

Search: OpenSearch Search engine

- When OpenSearch compatible engine is selected, you will have to set up some more options
- Put the Search engine request URL (parameters can be defined directly)

— Search Engine Options

Search Engine URL : ?

HTTP Method :

Number of results by page : ?

- Select a HTTP method to pass your query: POST or GET
- It is possible, if you wish, to limit the number of results per page. Simply input an integer value in the following field
- For example, inputting ‘0’ value, no result will be displayed



This option will only be taken into account if you use the placeholder \$COUNTINDEX in your parameter list or in your URL

Search: OpenSearch Search engine

- To facilitate integration into D2, you have the ability to choose within configuration screen , Opensearch stylesheet for transformation (XSLT):

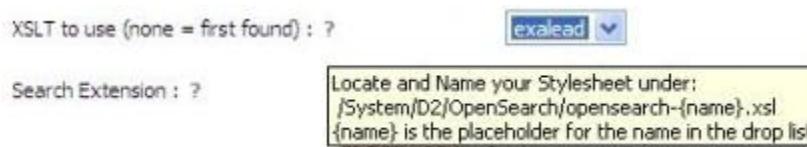
Armoire/System/D2/OpenSearch

- To modify these files, it is only necessary to select them into below cabinet. Also, it is possible to add stylesheet into repository.

- To be able to use them, stylesheets must be named properly as following:

opensearch-{nom}.xsl

- Once they are added, they are noticed as XSLT Opensearch and their (name) is listed into the combo of search configuration screen:



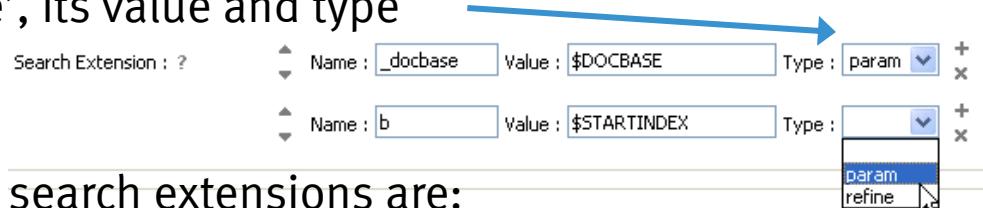
If the stylesheet of a registered configuration is deleted, it will be replaced by the first one found by the system.

Search: OpenSearch Search engine

- Search standard, OpenSearch allows you, when interoperability is an issue, to add “extensions” to the search engine URL request.
- These extensions are of two kind: **refine** and **param**. They give the ability to refine a search term and to add security parameters, for example.
- You can add as many parameters as necessary, move and delete are also possible using the respecting buttons
- To add an extension, input the ‘Name’, its value and type

Search Extension : ?

Name : <input type="text" value="docbase"/>	Value : <input type="text" value="\$DOCBASE"/>	Type : <input type="button" value="param"/>
Name : <input type="text" value="b"/>	Value : <input type="text" value="\$STARTINDEX"/>	Type : <input type="button" value="param"/>
<input type="button" value="refine"/>		

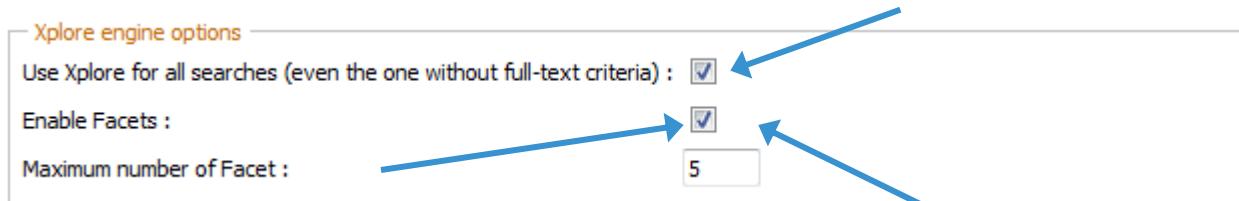


- The different alias available for these search extensions are:
 - **\$STARTINDEX**: defines the starting index value of the pagination module
 - **\$COUNTINDEX**: defines the number of result item per page
 - **\$USERGROUP**: resolves the list of group the connected user has
 - **\$USERTICKET**: Documentum ticket the connected user has
 - **\$DOCBASE**: Repository name resolution serving the content for the research

Please refer to the OpenSearch engine documentation, in order to know the best way to use efficiently the engine capability from D2.

Search: xPlore engine

- To access this option, xPlore engine must be associated to your D2 environment.
- xPlore can be used for all searches types (full text or advanced)
- If you do not select this box, xPlore will be used only for full text searches



- To activate facets display, this box must be checked. (available for D2 3.1 UI only)
- Moreover, it is possible to limit facets number to display into the repository browser, using this field.
- Then to complete your facets configuration, access the D2 search configuration module.
- For each selected property, you are able to specify if :
 - This attribute is used as facet and displayed into the repository browser
 - This Facet is launched by default with full text search

Use this property as Facet : Facet selected by default :

Query form

Query form can be defined to easier search on properties in D2-Client.

The screenshot shows the D2 Client interface with the title bar "D2 > Query form". The main window is divided into several sections:

- Properties:** A panel on the left containing "Query forms" and a single item "FORM Directive".
- Name :***: FORM Directive
- Description :**: (empty text area)
- Applications :**: (list box with a plus sign to add items)
- Label fr :**: Directive FR
- Label en :**: Directive EN
- Query / Form mapping:**
 - Property page :***: FP IE
 - Default value :**: 3.1.0
 - DQL :* ?**: select * from directives
 - Add mandatory attributes in hidden mode : ?**: (checkbox)
 - Add the user column preferences : ?**: (checkbox)
- Category:**
 - Path : ?**: /
 - Description : ?**: (empty text area)
 - Existing categories :** (list box containing "Public searches")

These forms can be then associated to contexts and put into categories.

Query form

- Fill in general properties and add labels

The screenshot shows a 'Properties' screen with the following fields:

- Name :* New search form
- Description :
- Label fr :
- Label en :
- Applications : (with a plus sign and minus sign button)

A blue arrow points from the 'Label fr' field to the 'Label fr' field in the slide text.

- Select the property page to display for your search
- D2 Config allows you to directly preview the page
- When you select the following checkbox, needed information for full display of main screen will be used at the request time. The preferences of columns will not be affected *
- You can add a default value configuration to automatically fill in the different attributes contained in page.
- Enter the DQL request using attributes of the properties file. Use the \$value() to retrieve the values of different attributes.

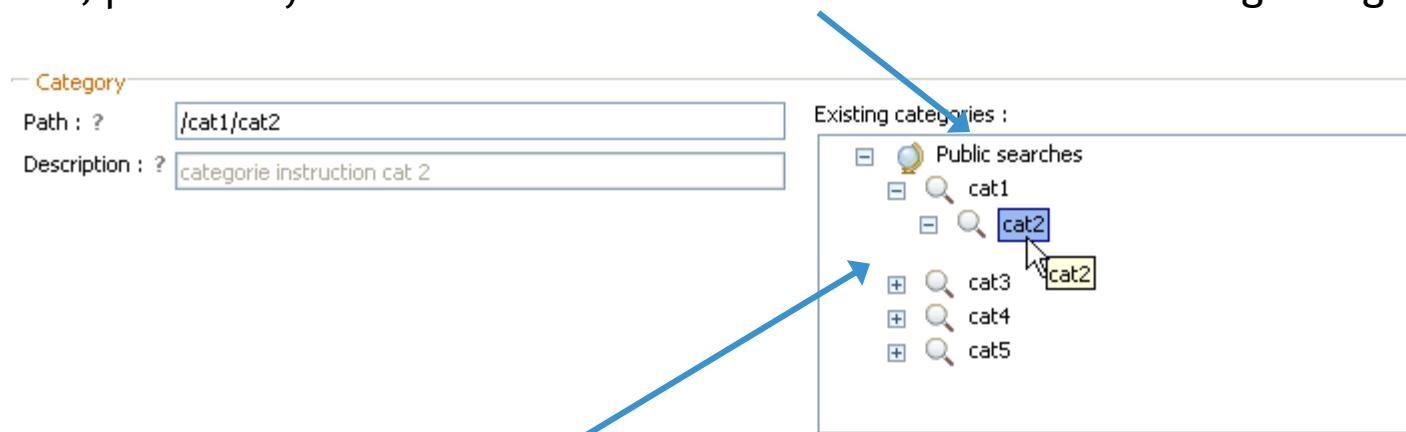


Add mandatory attributes in hidden mode : ?

Default value : VLD Docs management
DQL :* ?
select r_object_id,object_name,title from dm_document where title='\$value(title)'

Query form

- Query forms are « Public searches ». You can add them directly in or to categories in order to arrange them
- To do so, position yourself on « Public searches » or on the existing category.



- A list of existing categories is available. You can add a category to the root or as a sub-category of an other
- To create a category or a full path of categories, select your starting node and modify the path on the left pane (separate categories with « / »).
- Add a description to the new category only, in order to lead the user
- You can expand or collapse categories using the

Search Mapping

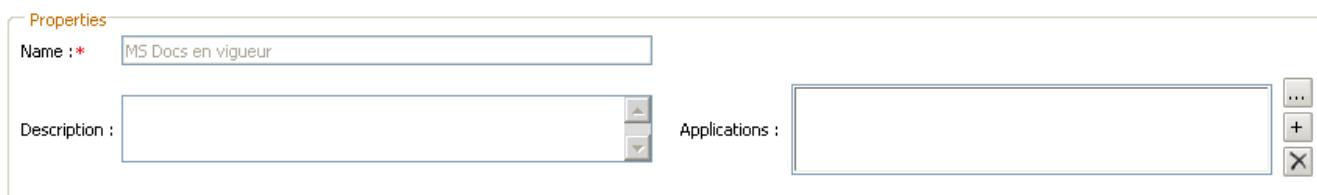
- This feature allows to define types and properties from the repository which will be enabled into the D2-Client advanced search screen. You can setup different search modules depending on the user group needs
- Begin with naming your object

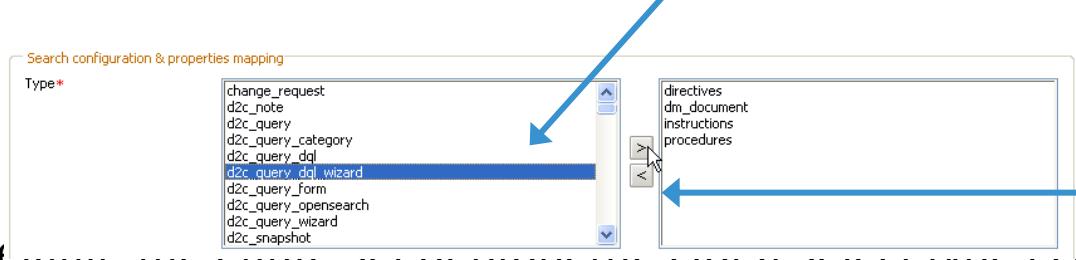
Properties

Name : * MS Docs en vigueur

Description :

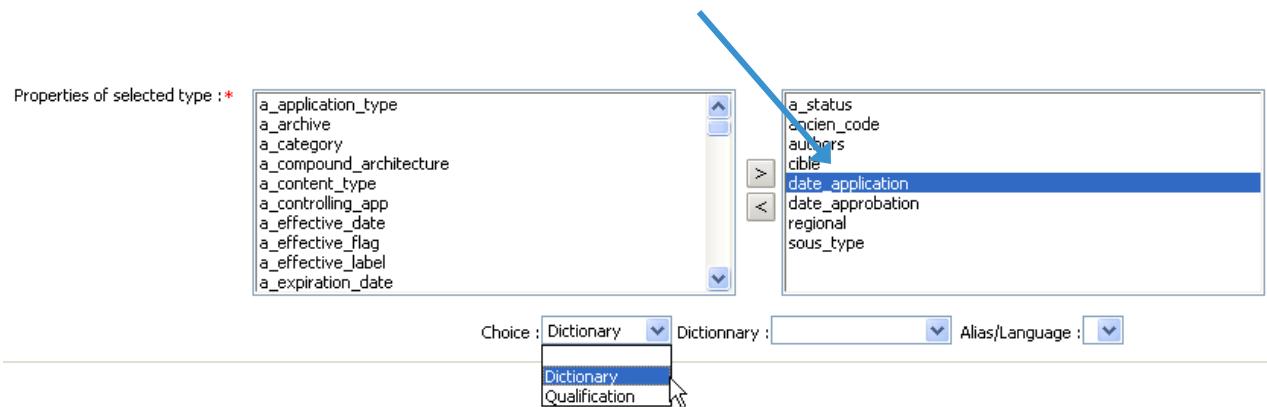
Applications :



- From the types list, then select types available and to be used into the search
 - By default, the entire set of properties for a selected type is added to the mapping. It is then possible to remove some of them using the arrows
- 
- Search configuration & properties mapping
- Type*
- change_request
d2c_note
d2c_query
d2c_query_category
d2c_query_dql
d2c_query_dql_wizard
d2c_query_form
d2c_query_opensearch
d2c_query_wizard
d2c_snapshot
- selected types
- directives
dm_document
instructions
procedures
- Properties of selected type : *
- a_application_type
a_archive
a_category
a_compound_architecture
a_content_type
a_controlling_app
a_effective_date
a_effective_flag
a_effective_label
a_expiration_date
- selected properties
- a_status
ancien_code
authors
cible
date_application
date_approval
regional
sous_type
- Use the arrows to add or remove items to/from the selection list.

Search Mapping

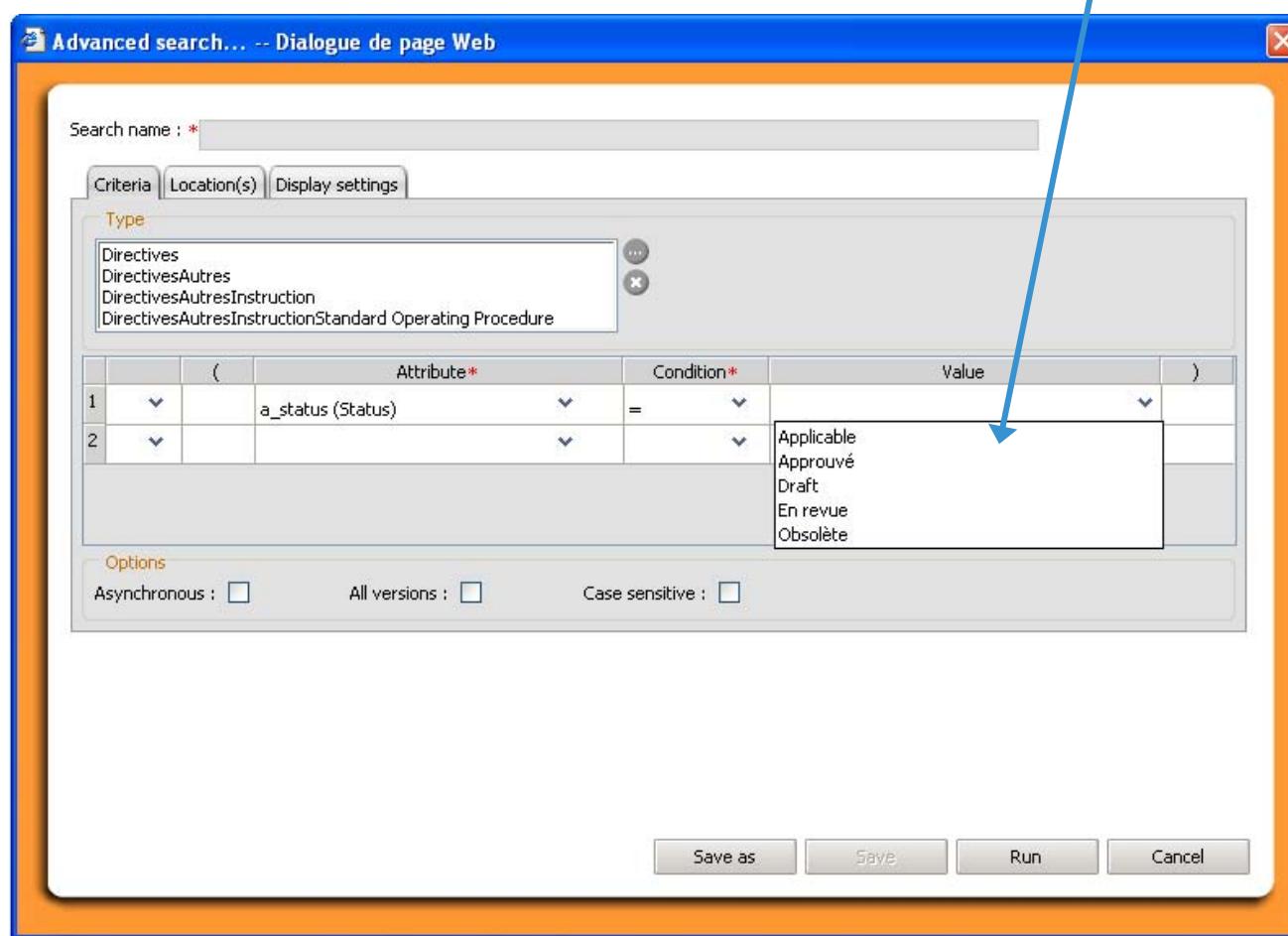
- The search mapping gives you also the ability to associate a value to each property using dictionaries or DQL qualification request.
- Select a property from the selection list



- You can then choose an combination type for the value using:
 - a dictionary and alias/ language
 - a DQL qualification
- Facets are also managed within this screen (cf:xPlore)

Search Mapping

Association is viewable in D2-Client into the advanced search window

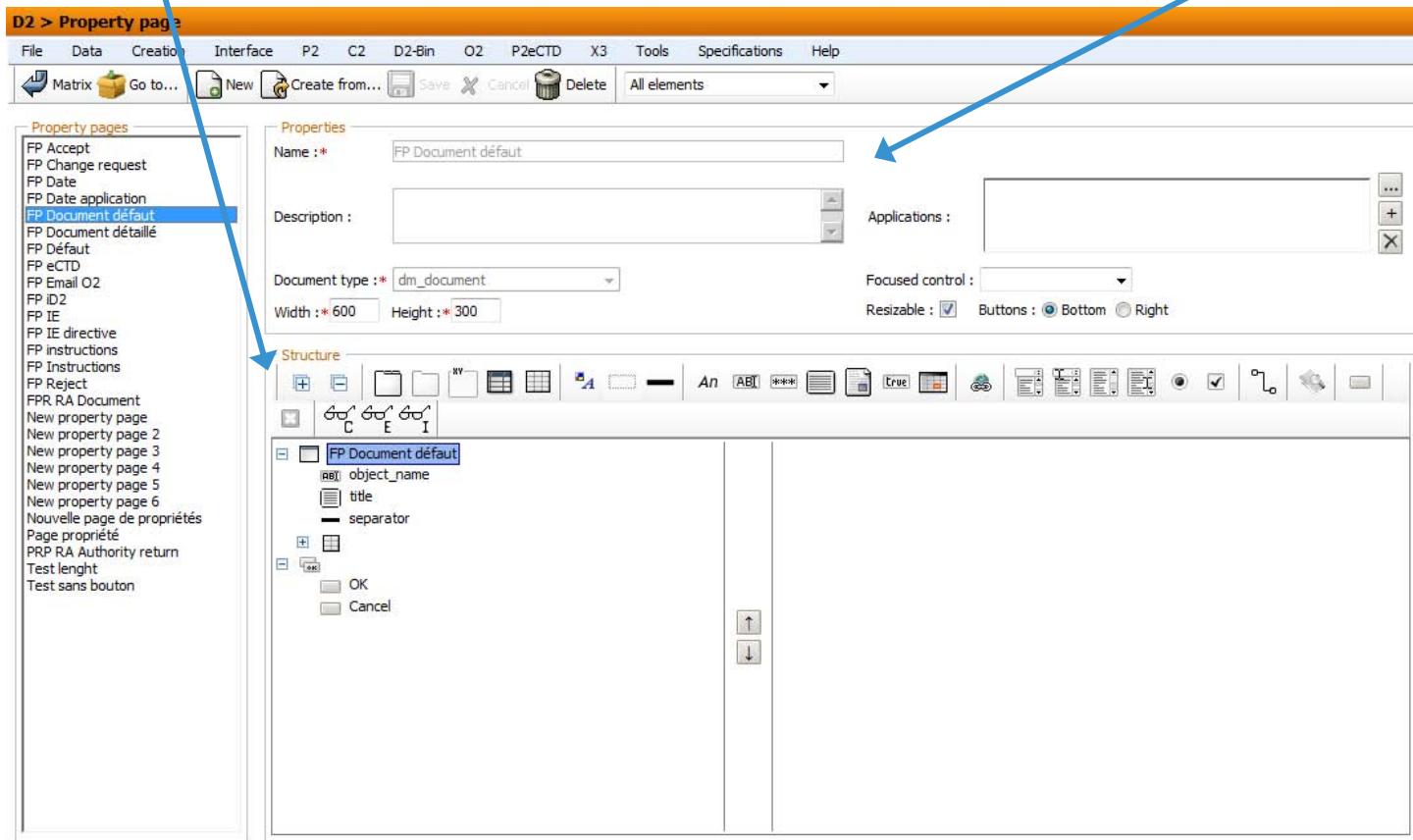


Properties page

EMC²

Properties dialogs

- Properties dialogs are created according to the document types and then associated to contexts
- They can be created from a blank dialog or by copying an existing one
- The creation screen is composed of two parts, one part for the properties of the dialogs and the other one for its structure



Properties dialogs

- A properties dialog is composed by different objects that make it possible to display document properties to which it refers:
 - *Label*
 - *Password Field (crypt)*
 - *Combo box (Editable Combo Box)*
 - *List field (Editable list field)*
 - *Text field or memo (multi lines)*
 - *Boolean or Check box or radio*
 - *Date*
 - *Relations*
- These objects are laid-out in objects allowing to organize them:
 - *Columns sets*
 - *Fieldset*
 - *Tabs*
 - *Grid*
 - *Separator*
 - *Blank field*
- All objects have their own configuration to define
 - Property to display or a field linked to a label
 - Visibility conditions
 - Enable conditions (read only or not)
 - Required conditions
- All objects are laid-out in a tree that represents the structure of the dialog
- The name in front of the property value will be the one entered in the property definition (with application builder). It can also be replaced by a specific label if needed.

Properties dialogs: properties and geometry

- Click  and enter the name of the new dialog and its description

Properties

Name :*	FPR AR Documents accompagnant	Focus arrow pointing to Name field
Description :	<input type="text"/>	Focus arrow pointing to Description field
Document type :*	ar_document_accompagnant	Focus arrow pointing to Document type dropdown
Width :*	800	Focus arrow pointing to Width input field
Height :*	630	Focus arrow pointing to Height input field
Focused control : title		Focus arrow pointing to Focused control dropdown
Resizable <input checked="" type="checkbox"/>		
Buttons : <input checked="" type="radio"/> Bottom <input type="radio"/> Right		

- Select the document type on which the dialog will be applied
- Enter the size of the dialog (integer),

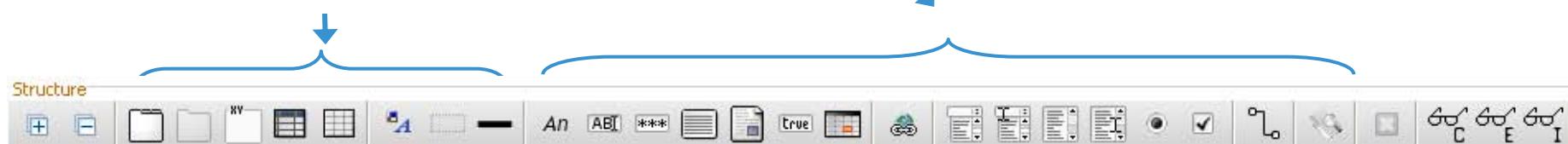
Description :	<input type="text"/>	
Document type :*	ar_document_accompagnant	
Width :*	800	Focus arrow pointing to Width input field
Height :*	630	Focus arrow pointing to Height input field
Focused control : title		Focus arrow pointing to Focused control dropdown
Resizable <input checked="" type="checkbox"/>		
Buttons : <input checked="" type="radio"/> Bottom <input type="radio"/> Right		Focus arrow pointing to Buttons radio buttons

Alphanumeric/ negative values are not supported in this field

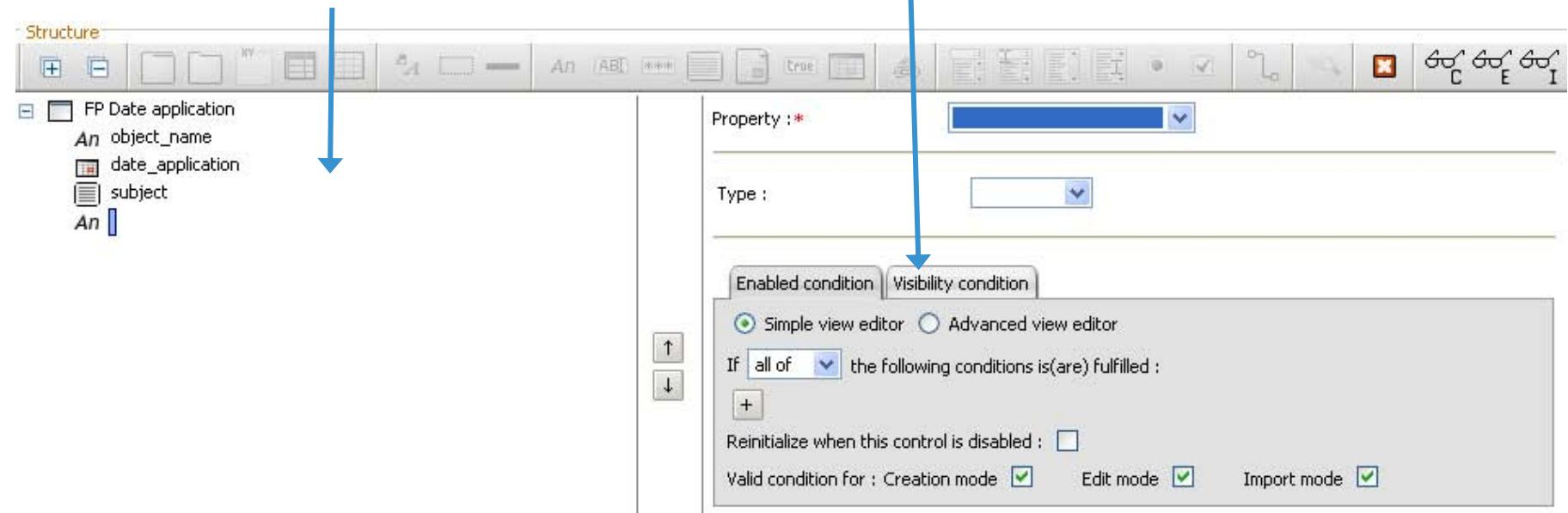
- Then the position of the buttons on the dialog, and the property that will have the focus when the dialog will be opened
- The symbol « * » means that the value is mandatory

To create a Properties dialogs: entering the structure

- Click the object to be inserted in the dialog in the selection bar
 - Object to display content properties*
 - Object to organize the dialog*



- The object is inserted in the tree and its configuration appears on the right hand side



To create a Properties dialog: custom labels

- It is possible, for each property component to use custom labels using this following fields



Label fr : Indication

Label en : Indication

- When custom label is added, it will be used to overwrite default values

A screenshot of a properties dialog with a yellow border. It contains three text input fields labeled 'Name', 'Title', and 'Authors'. Below each field is a small set of four circular buttons (ellipsis, X, up, down). At the bottom are three buttons: 'OK', 'Cancel', and 'Favorites'.

A screenshot of a properties dialog with a yellow border. The labels 'Name', 'Title', and 'Authors' have been replaced by 'Indication'. The layout is identical to the first dialog, with three text input fields, four circular buttons below each, and three buttons at the bottom: 'OK', 'Cancel', and 'Favorites'.

To create a Properties dialog: do not link to property

- Components linked to properties can be unlinked in order to use them as input help field
- To do it check following box and add a name as control identifier
- This control can be overwritten with custom label
- To use it as input help, associate it to a type
- Then create another control which will use it as filter
- For example « Os name » allows here, to list all repository logins. Complete user name will be displayed after « OS name » sorting into « User name » field

Do not link to property :

Control id : * util

Label fr : Nom OS

Label en : OS name

Load asynchronously :

Type : DQL

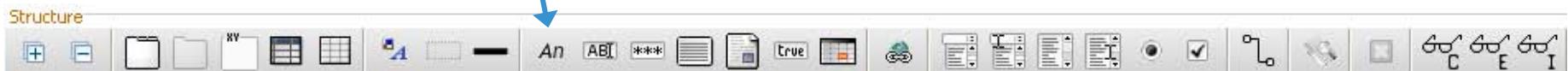
Query : select user_os_name from dm_user

OS name : user01

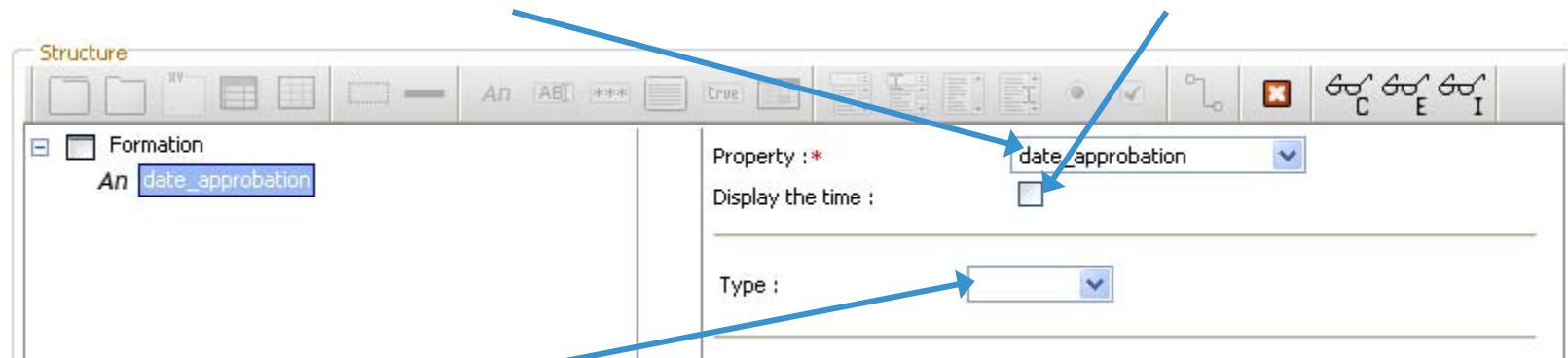
User name : User 01

To create a Properties dialogs: to insert a label

- Click the label icon and a label object will be added in the tree



- Select the desired property (click to display a date with the hours)



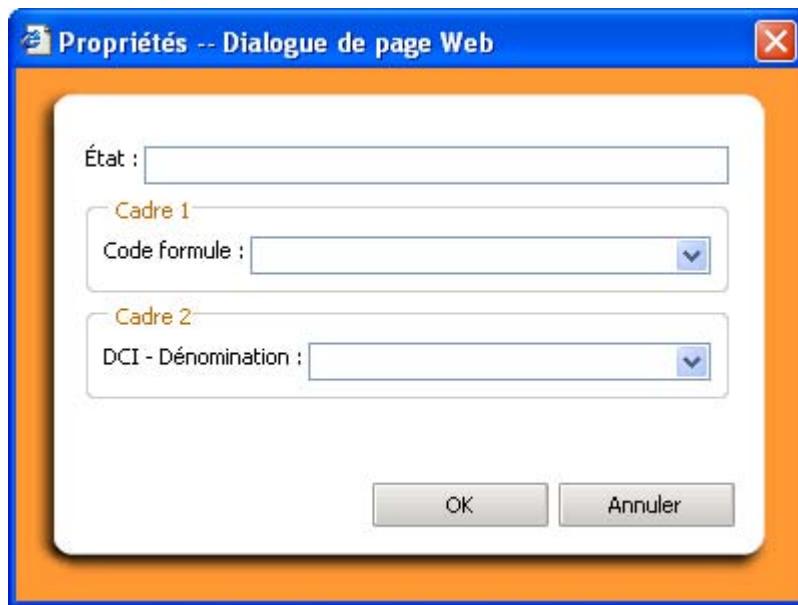
- Select dictionary if you want to use a dictionary to display different languages or aliases



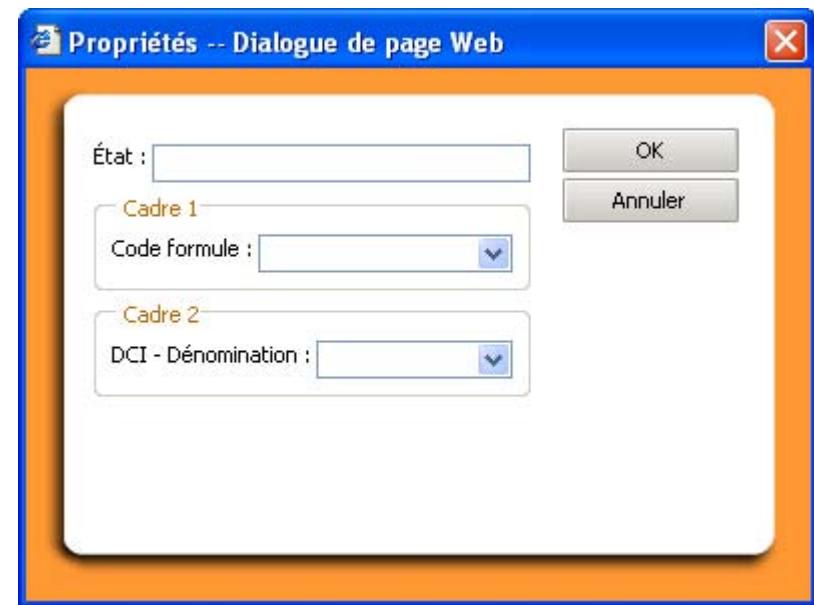
To create a Properties dialogs: to insert a label

You can, at any time, have a look to the properties dialog to see the result

- Dialog for import document
- Dialog for properties editing
- Dialog for document creation



Bottom buttons



Top buttons

Properties dialogs: to insert a comment field

(not linked to a property)

- Click the icon comment and a label object will be added in the tree



- Enter the label to display,
You can use the following placeholders:

\$value(property_name)
\$alias(alias_name_set.alias_name)

Label containing HTML:
Label fr :
Label en : This is a comment field

The properties dialog for a comment field includes fields for the HTML label, French label, and English label. It also includes styling options: Color (black), Size (8), Bold, Italic, and Underlined.

- Select the colour
- The font size
- Check the box to write in:
 - Bold
 - Italic
 - Underlined
- The remaining of the configuration is the same that the one of the label

Color :

Size :

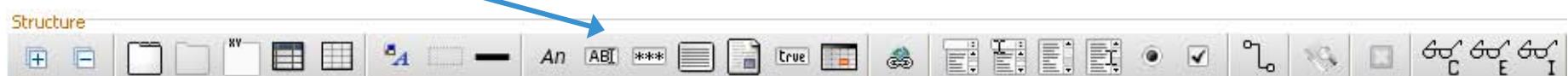
Bold :

Italic :

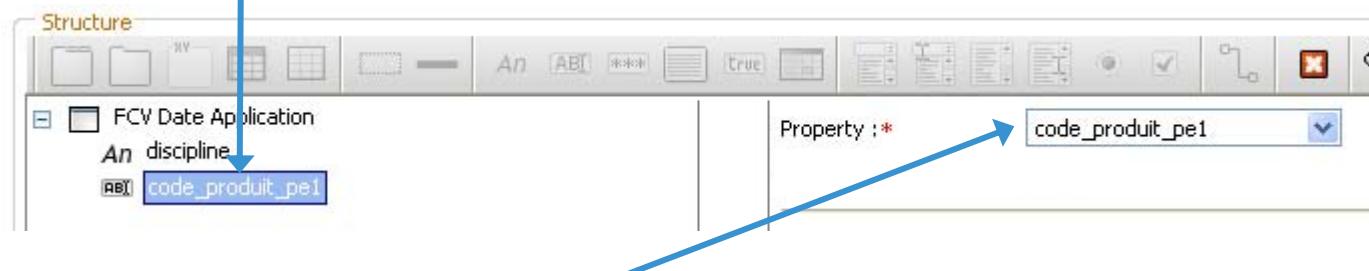
Underlined :

Properties dialogs: to insert a text field

- Click the tree, at the position where you want to insert it, and click the field text icon



- A text field will be added in the tree under the selected object

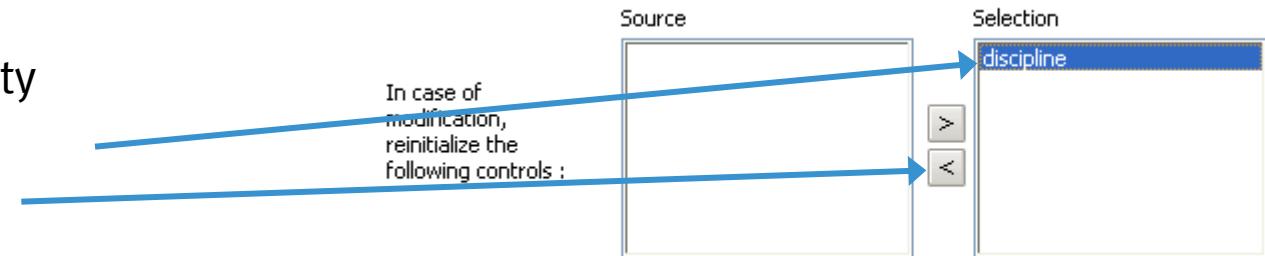
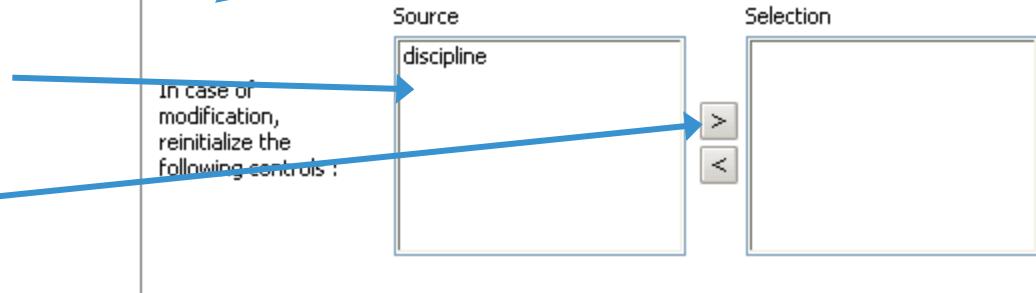
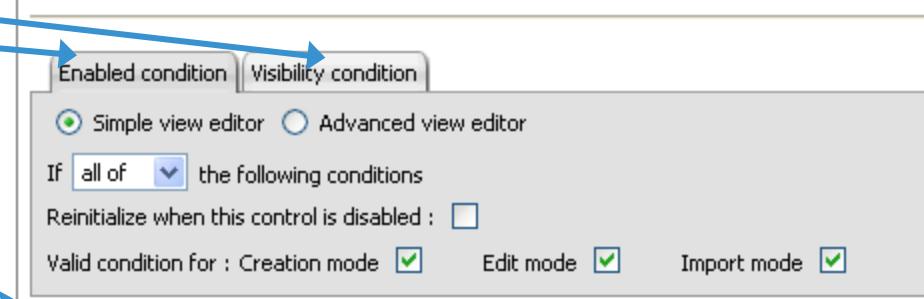


- Select the desired property
- To remove it, click it then on « x »



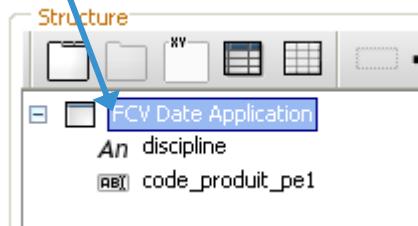
Properties dialogs: to insert a text field

- Enter the enable and visibility conditions like for the label object
- You can also define the properties to reinitialize if the selected property is modified (Set to blank these properties)
- Select property to reinitialize
- Click « > » to add it in the list (or double-click it)
- To remove a property from the list click it then click « < » or double-click it

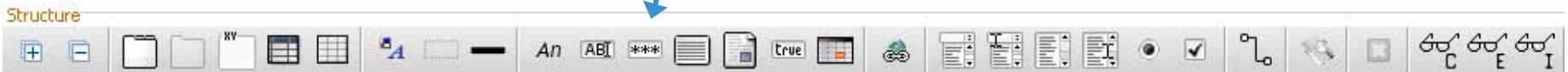


Properties dialogs: to insert a password field

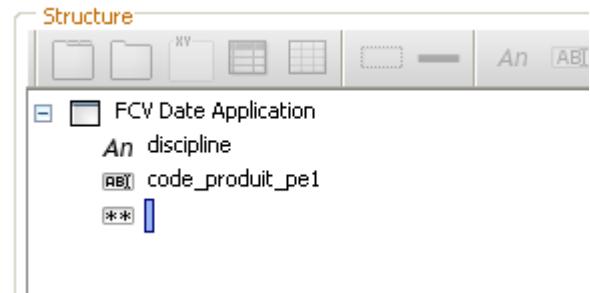
- A password field is a field where the text is crypt when displayed. It makes it possible to enter password
- Click the tree at the position where you want to insert it



- Click the password field icon

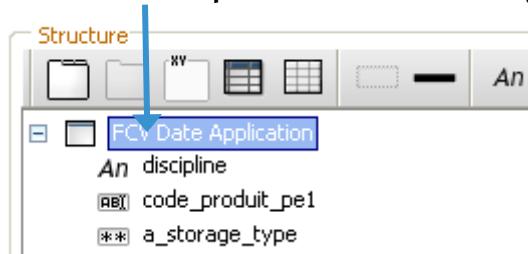


- It will be added at the end of the last object under the selection. In our case, at the end of the list
- The configuration is the same one than for the text field

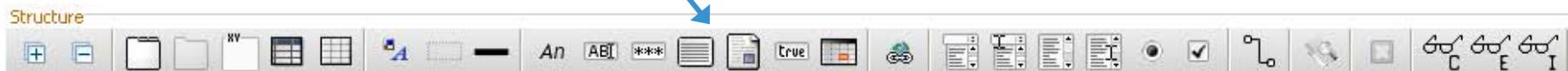


Properties dialogs: to insert a memo field

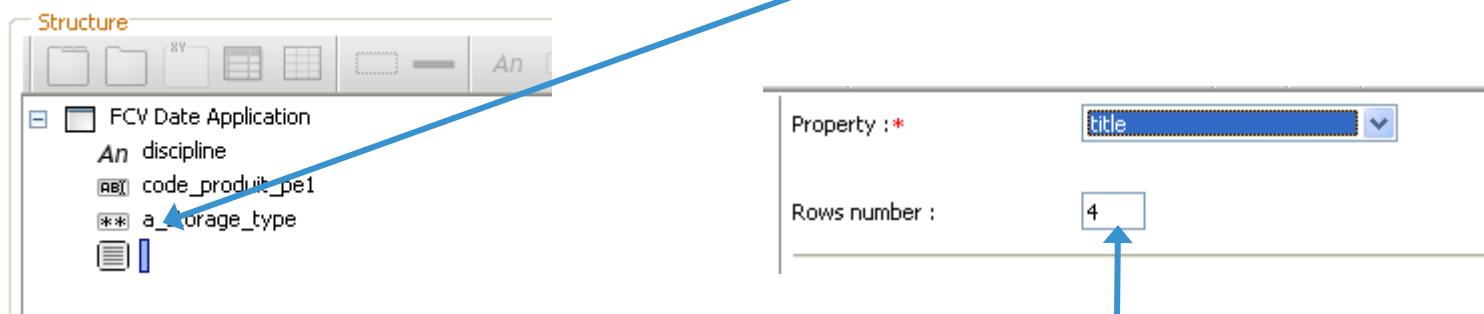
- A memo field is a text field with several lines
- Click the tree at the position where you want to insert it



- Click the memo field icon



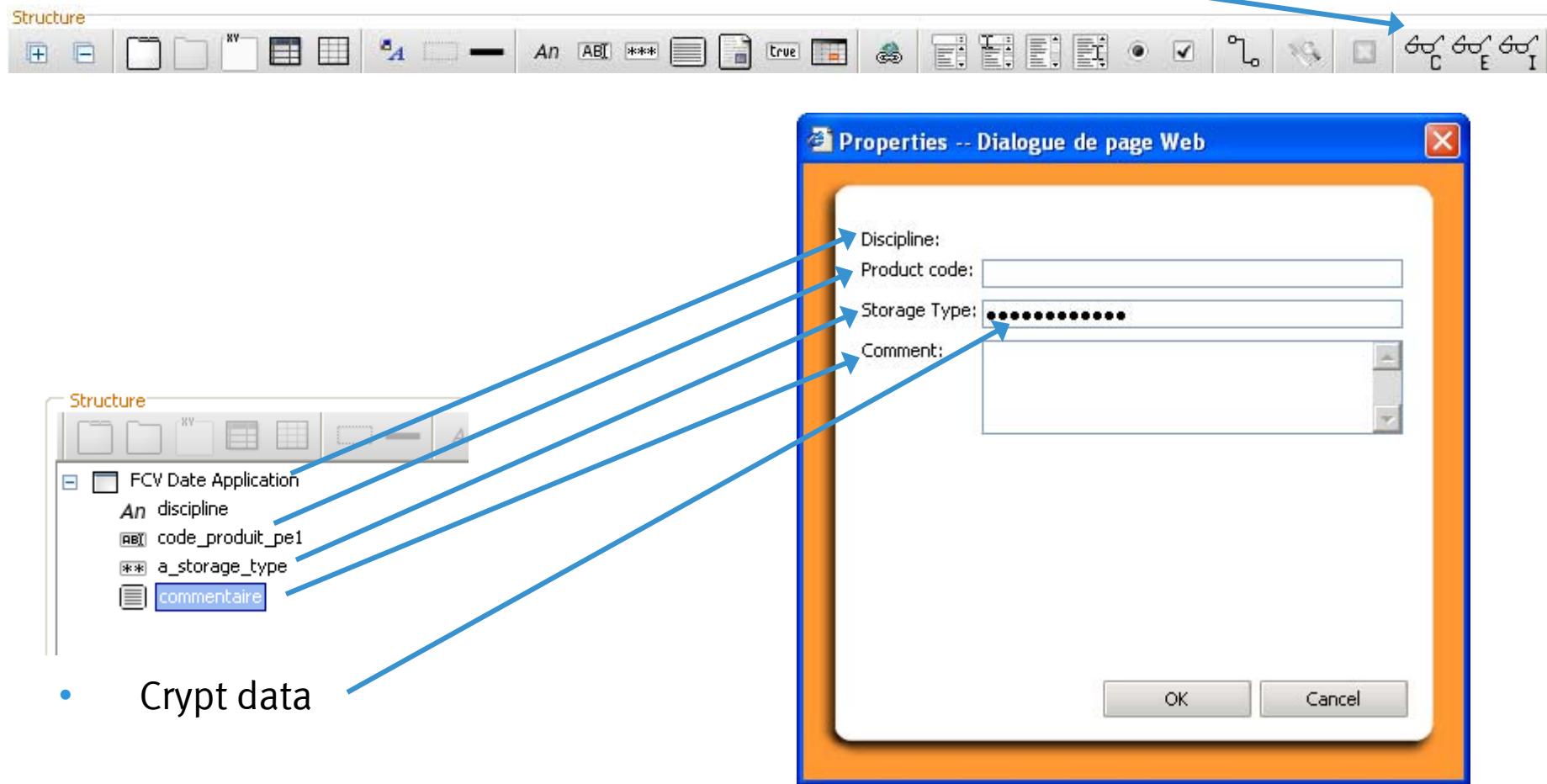
- It will be added at the end of the last object under the selection. In our case, at the end of the list



- The configuration is the same one than for the text field (+ number of lines)

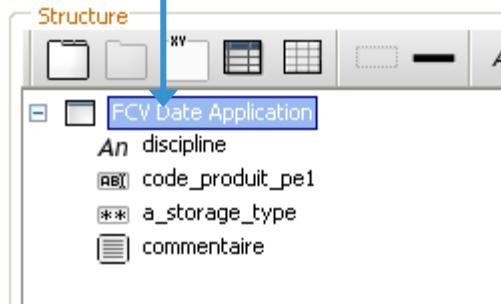
To preview the ongoing dialog

- Click preview to display the dialog

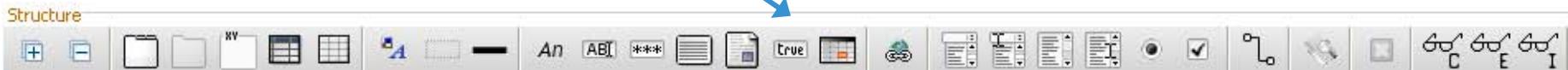


Properties dialogs: to insert boolean field

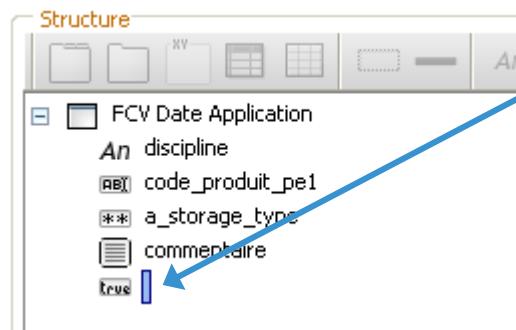
- Click the tree at the position where you want to insert it



- Click the Boolean field icon



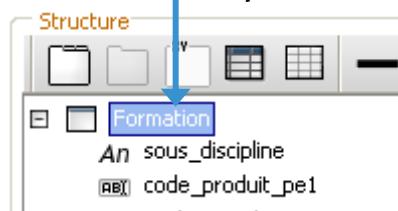
- It will be added at the end of the last object under the selection. In our case, at the end of the list



- The configuration is the same one than for the text field

Properties dialogs: to insert a date field

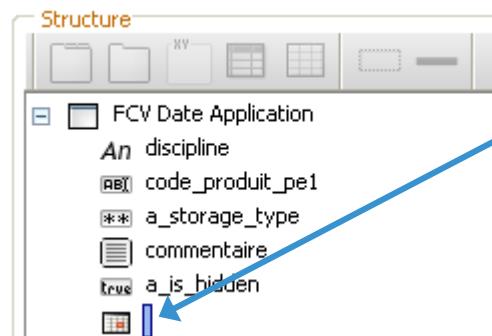
- Click the tree at the position where you want to insert it



- Click the date field icon



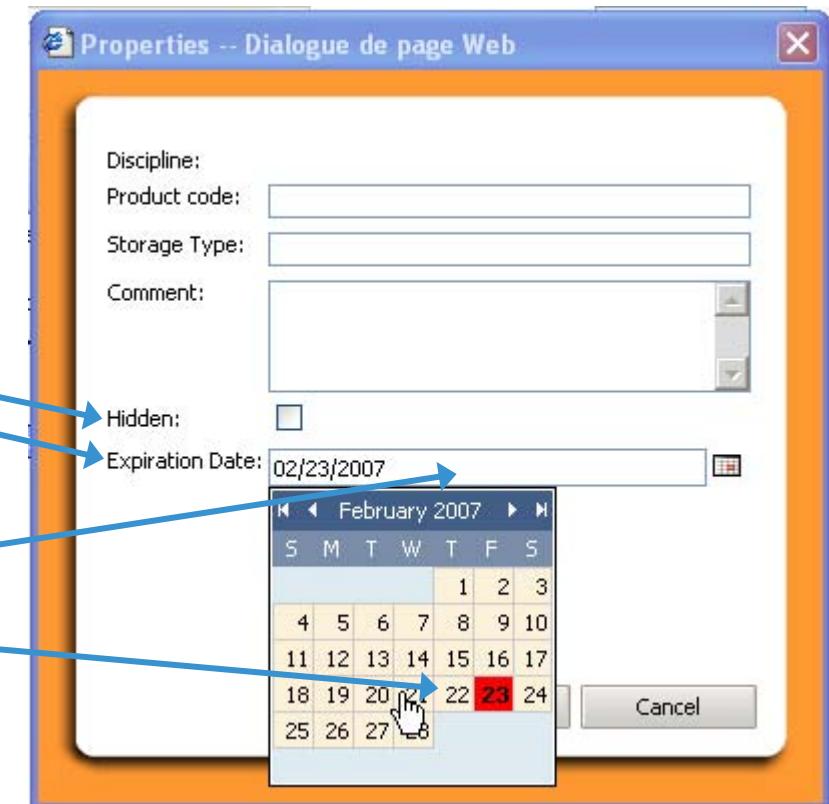
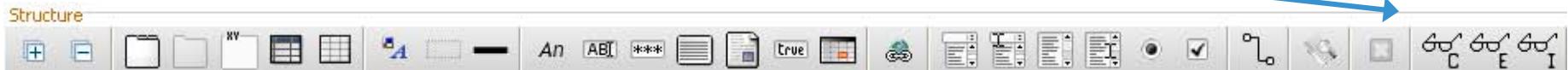
- It will be added at the end of the last object under the selection.
In our case, at the end of the list



- The configuration is the same one than for the text field

To preview the ongoing dialog

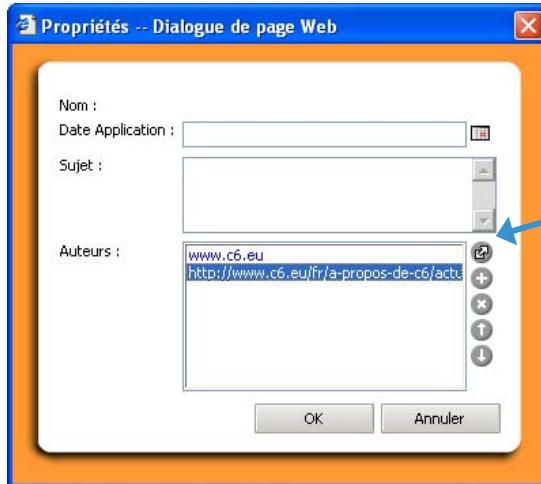
- Click the preview of the dialog



- Date selection

Properties dialogs : to insert a hypertext link

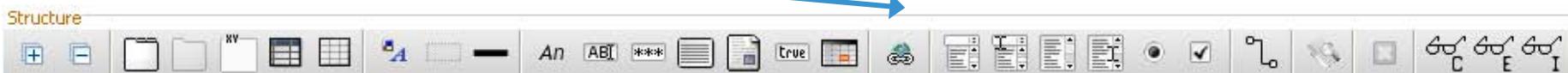
- Link to external resources can be displayed into properties pages of a document.
 - Click the following icon to add an hypertext link :
- 
- When you select a repeating attribute, the application proposes to select the method of opening links:
 - By double click URL
 - By click the button



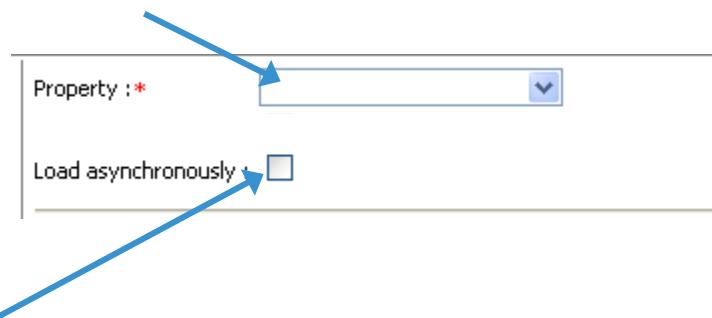
When the opening is performed using a button,
the double click will edit the selected link.

Properties dialogs: to insert a combo box

- Click the combo box icon and the object will be added in the tree. A combo box makes it possible to select a value in a list



- Select the desired property



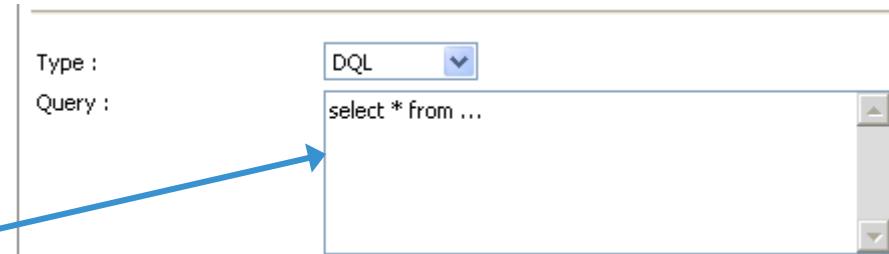
- Check the box if you want to get the values in asynchronous mode. The asynchronous mode is used to display a big number of values in a list, these values will be charged on click and using a filter, instead of at the opening of the dialog box. This makes it possible to limit the number of responses and to facilitate the search of a value in a big list

Properties dialogs: to insert a combo box

- And select how to get the values of the list:

DQL Query or Dictionary or Taxonomy

- If you select DQL



- Enter the DQL query here without « ; » at the end.
A syntax analysis will be done before saving the property in order to check its validity. You can save only if the syntax is correct.
The system will run the query and will return the result in the list of the combo box
- If you use the asynchronous mode, the DQL request must have the filter value \$value(filter), for example:
 - select user_name as name, user_name as label from dm_user where \$value(filter) order by 1
- To save a value and display a label, you have to use "as name" and "as label" like in the following example:
 - "select r_object_id as name, object_name as label from dm_document where ..."
 - "name" will be the saved value of the document and "label" the displayed one.

Properties dialogs: to insert a combo box

- To use the value of a property of the dialog use: \$value(property)
- The DQL request that returns the list of all users of the repository:
 - select user_name from dm_user where r_is_group = false order by 1
- In asynchronous mode, and to add a filter on "user_name", becomes :
 - select user_name as name, user_name as label from dm_user where r_is_group = false and \$value(filter) order by 1
- You do not need to add the special character "%" in the DQL request because it is done automatically

Properties dialogs: to insert a combo box

- If you select dictionary, the proposed values in the list will be the ones of the dictionary

A screenshot of a properties dialog window. At the top left, there is a label 'Type :'. To its right is a dropdown menu with the value 'Dictionary' selected. Below this, there is a label 'Dictionary :' followed by a dropdown menu containing the text 'Super famille'. Further down are labels 'Alias :' and 'Language :', each accompanied by a dropdown menu.

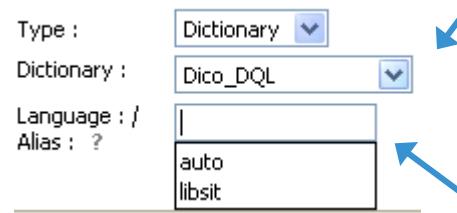
- Select the desired dictionary

A screenshot of a properties dialog window. The 'Type :' dropdown at the top left is set to 'Dictionary'. The 'Dictionary :' dropdown below it now contains the value 'Super famille'. The 'Alias :' and 'Language :' dropdowns are also visible below.

- Then if you want to display a language OR an alias instead of the key of the value

Properties dialogs: to insert a combo box

- With DQL dictionary you can customize label display from combo/list box controls.
- Select the dictionary, the list of available alias displays. The displayed alias matches the attribute's name 'as name' as defined in the DQL query for the dictionary.



- To customize your labels, you can use all the attributes from the query using the placeholder \$value() from the editable field Language/Alias.
- Thanks to the combining value/characters, you can play with the value labels which will display in the combo/list box on a property page.
- Attribute mapped to the name will use the 'name' and no more the initial default name value.
- For example: '\$value(name) - \$value(libsit) / 2009'

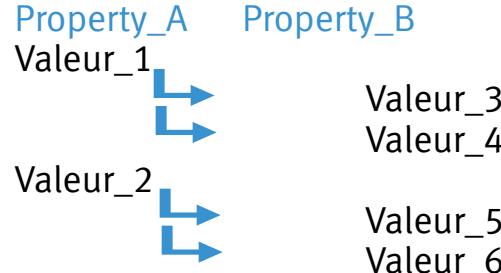


Properties dialogs: to insert a combo box

You can also select a taxonomy:

A taxonomy (see paragraph on [taxonomies](#) of this document) makes it possible to filter or to deduce one or several properties

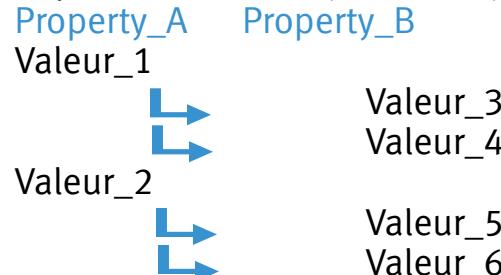
- Example of property filtering : [taxonomy_1](#) ([Property_A](#), [Property_B](#))



Choice of valeur_1 in [Property_A](#) will set Valeur_3 and Valeur_4 in [Property_B](#)

Choice of valeur_2 in [Property_A](#) will set Valeur_4 and Valeur_5 in [Property_B](#)

- Example of deducing by taxonomy : [taxonomy_2](#) ([Property_A](#), [Property_B](#))



Choice of valeur_3 in [Property_B](#) will set Valeur_1 in [Property_A](#)

Choice of valeur_4 in [Property_B](#) will set Valeur_1 in [Property_A](#)

Choice of valeur_5 in [Property_B](#) will set Valeur_2 in [Property_A](#)

Choice of valeur_6 in [Property_B](#) will set Valeur_2 in [Property_A](#)

Properties dialogs: to insert a combo box

- Select taxonomy and the desired taxonomy

A screenshot of a properties dialog with the following fields:

- Type : Taxonomy
- Taxonomy : Type / Sous-type AR
- Level : Sous-type AR
- Locale : en
- Alias : sous_type
- Previous Property : (empty)
- Next Property : sous_type

Blue arrows point from the text descriptions on the left to the corresponding dropdown or input fields.

- The level in the taxonomy of this property, and the language or alias to be displayed
- Select property to filter or to deduce

A screenshot of a properties dialog with the following fields:

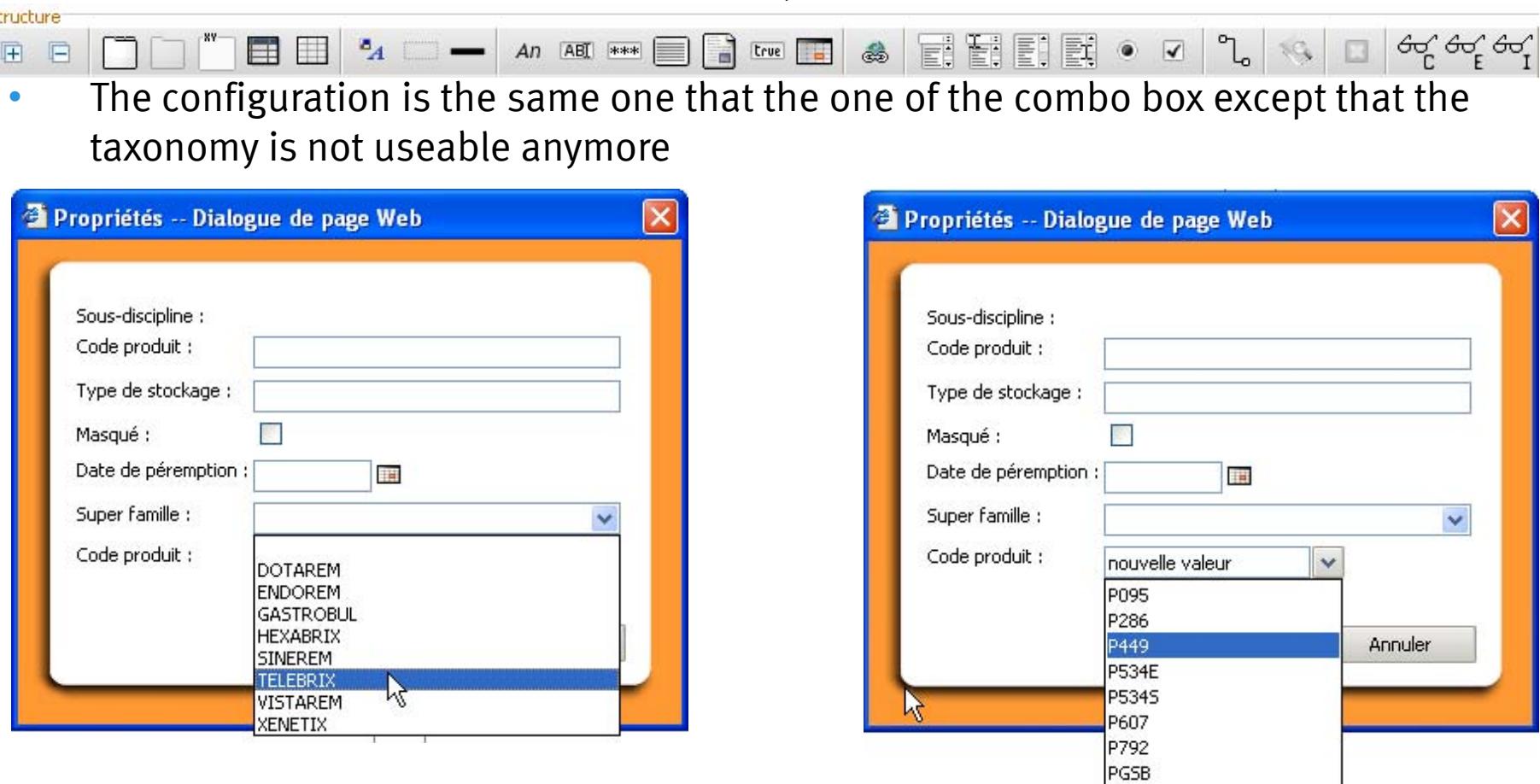
- Type : Taxonomie
- Taxonomie : Type / Sous-type AR
- Niveau : Type AR
- Locale : fr
- Alias : sous_type
- Permet de déduire les valeurs de : (empty)
- Permet de filtrer les valeurs de : sous_type

Blue arrows point from the text descriptions on the left to the corresponding dropdown or input fields.

- The enable and visibility conditions and the re init of the property is the same than the previous objects

Properties dialogs: combo box editable

- An editable combo box makes it possible to select a value in a list but also makes it possible to enter free text
Click the editable combo box and the object will be added in the tree
- The configuration is the same one that the one of the combo box except that the taxonomy is not useable anymore

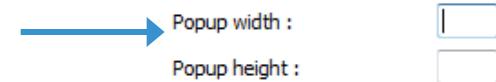
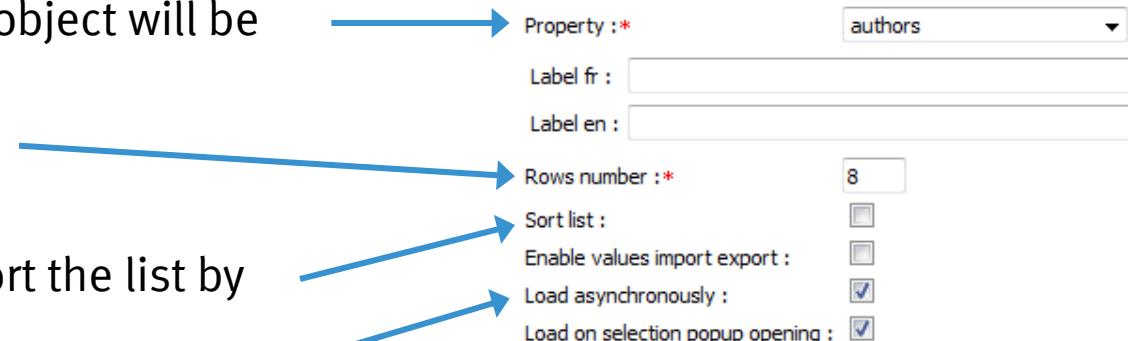


Properties dialogs: field list (or editable)

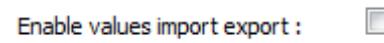
- A field list makes it possible to select several values in a list. The selected property must be of type « Repeating »



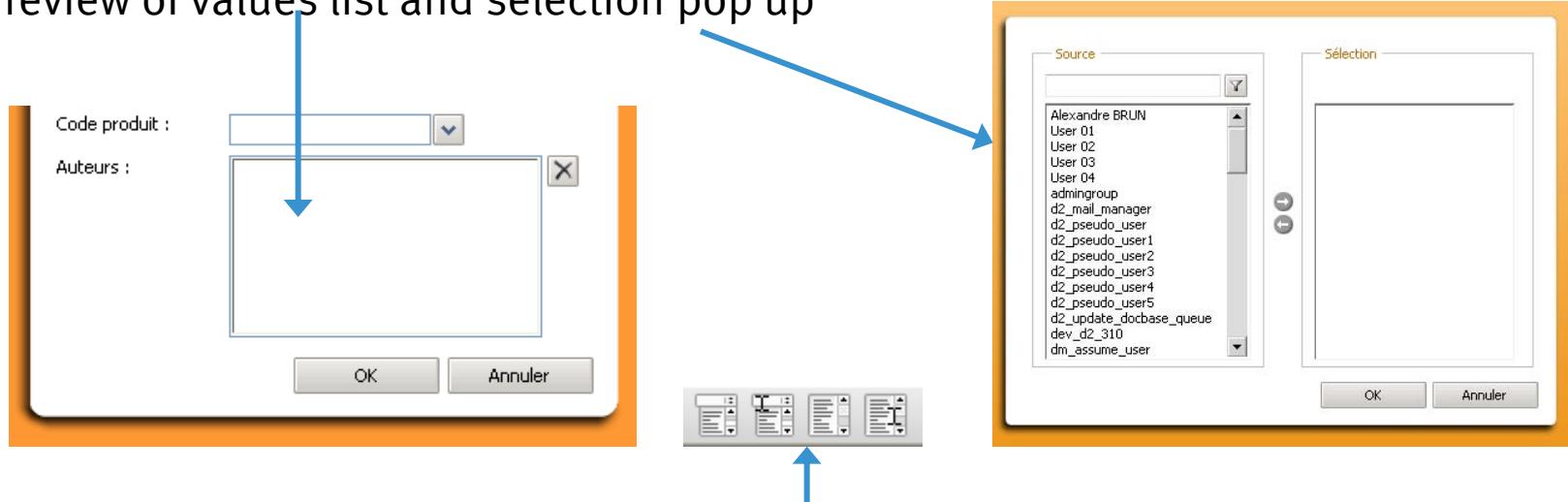
- Click the field list icon and the object will be added in the tree
- Define a rows number to use
- Check this box if you want to sort the list by alphabetical order
- It is possible to load values asynchronously into selection pop up. To do it check this box
- Thus, these values will be displayed when opening window. Otherwise, they will be loaded when « Enter » will be pushed on user keyboard.
- Custom sizes can also be entered for the selection pop up using the following fields:
- **If those fields are empty, default size will be apply on selection window**



Properties dialogs: field list (or editable)

- By checking this box, you can enable values import and export from .xls field.

Enable values import export :
- In the pop up of values selection, two buttons display enabling the launch of these functions.

Import ... Export ...
- The reminding on the configuration is the same than for the combo one except that the use of a taxonomy is no longer possible
- Preview of values list and selection pop up



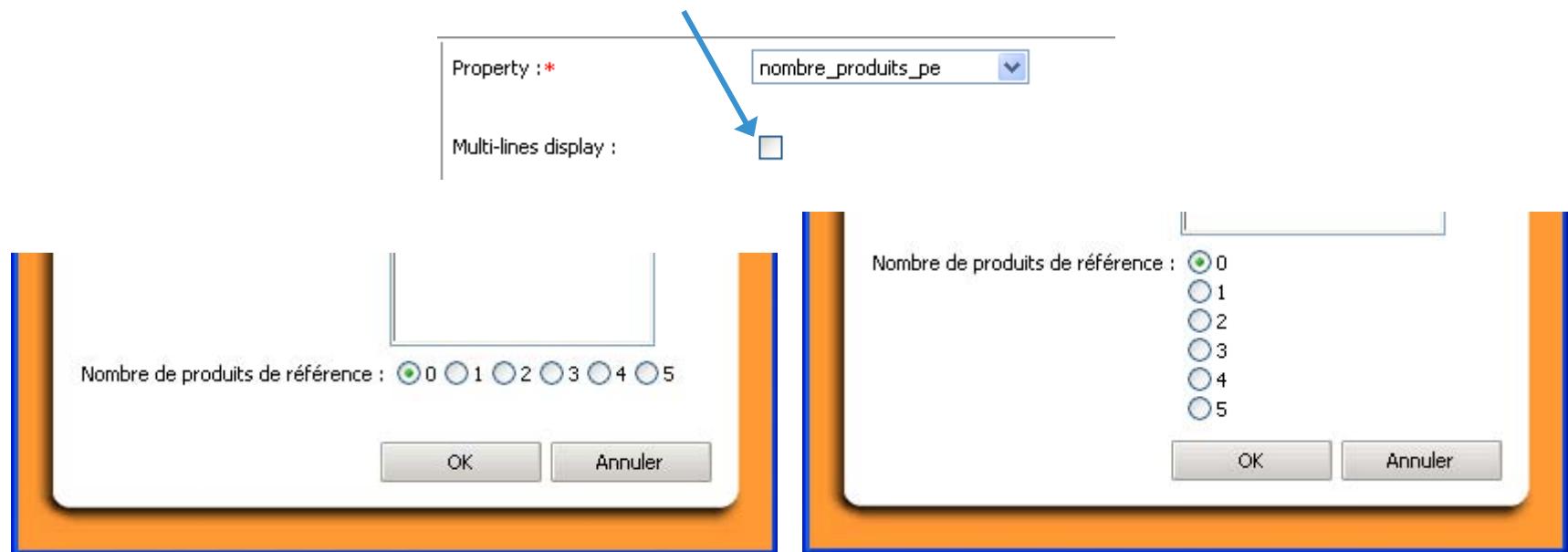
- The editable field list is the same one but allows you to add a free text value

Properties dialogs: to insert a radio field

- A radio field makes it possible to select a value in a list by a simple mouse click. Click the radio field icon



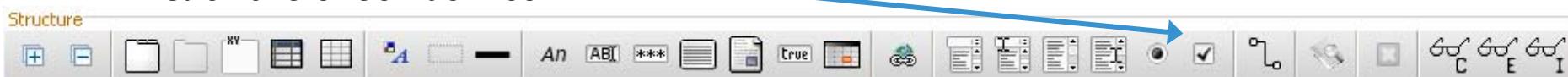
- You can select a multi line display instead of all the line in one (by default)



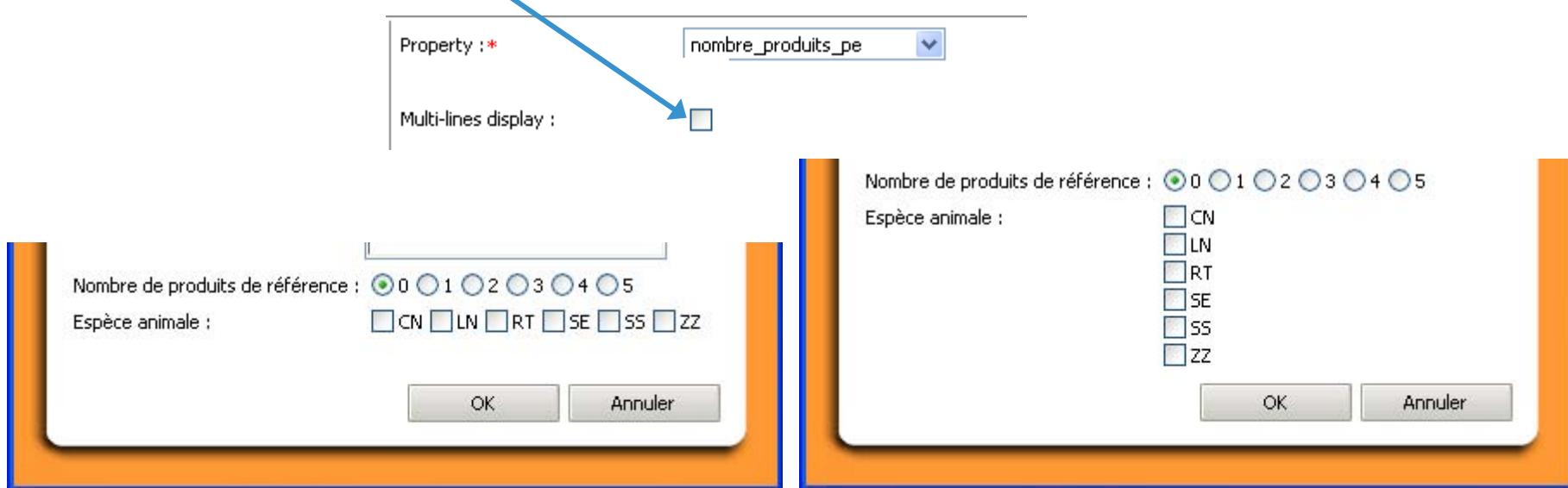
- Configuration is the same one tan for combo box except that the use of a taxonomy is no longer possible

Properties dialogs: to insert a check box

- A check box makes it possible to select a value in a list by a simple mouse click. Click the check box icon
The selected property must be of type « Repeating ».
Click the check box icon



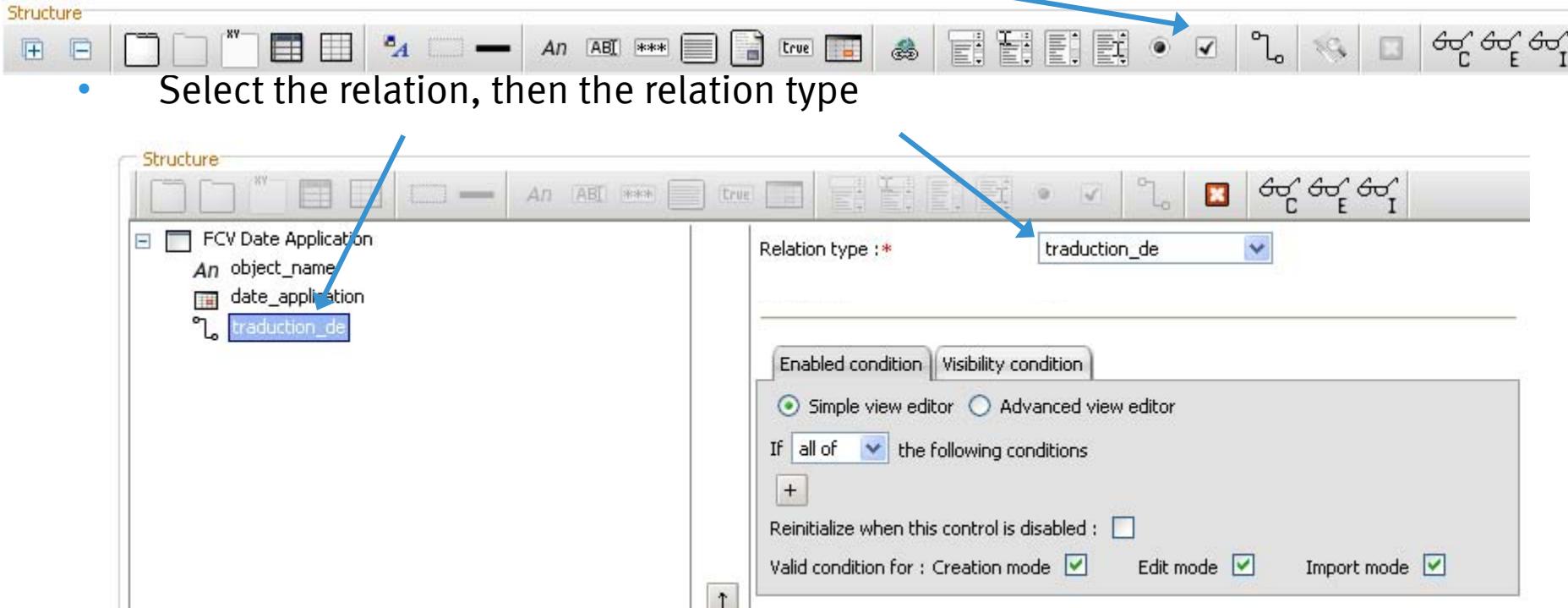
- You can select a multi line display instead of all the line in one (by default)



- Configuration is the same one tan for combo box except that the use of a taxonomy is no longer possible

Properties dialogs: to insert a relation

- A relation makes it possible to link, during the creation process, to one or several pieces of content to the created one
- Click the relation icon to insert one
- Select the relation, then the relation type



- The enable and visible conditions and the reinitialization of properties configurations are identical to the previous ones

Properties dialogs: Relation D2_COPY_OF

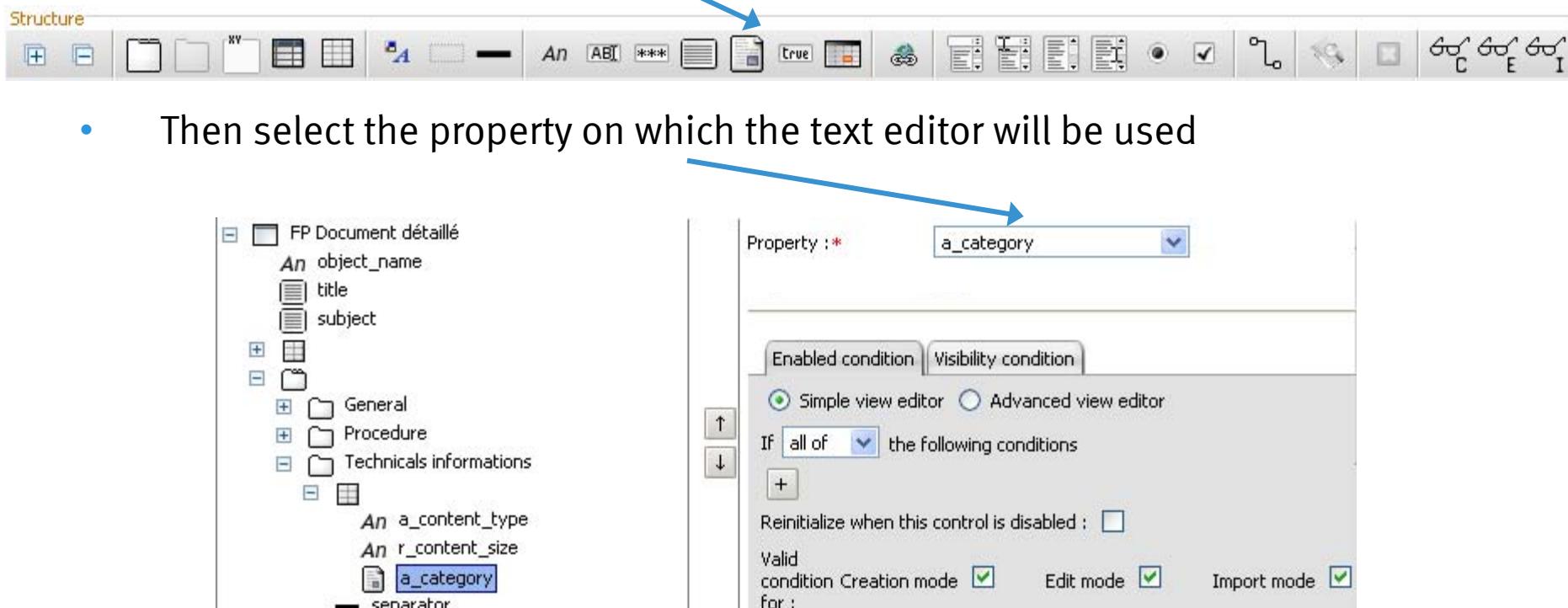
- A particular relation named D2_COPY_OF is automatically created by the system when a document is created by inheritance
- This relation can be visualized in a property dialog
- The description field in the detailed window, when you select relations, indicates if inheritance is :
 - From properties
 - From content
 - From structure
 - Or a combination of these three



Relation	Name	Description
Has as copy	AR_06_0030	Attributes
Is a copy of	AR_06_0028	Attributes

Properties dialogs: Rich text editor

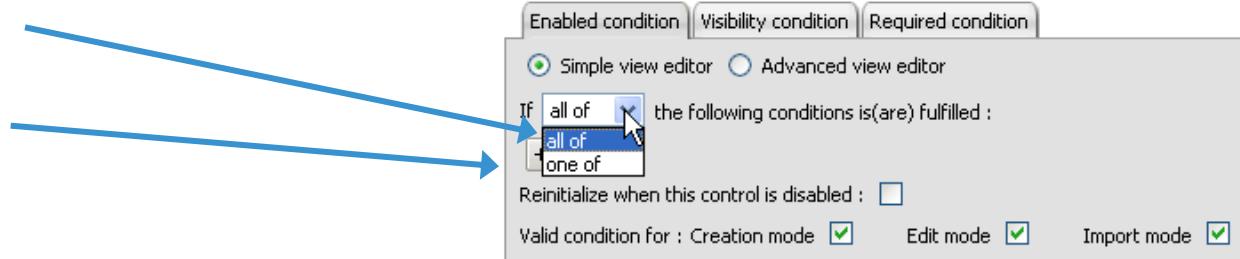
- The Rich text editor allows to input and format data in a property page thanks to tools for word.
- Click the Rich text editor icon to insert this functionality



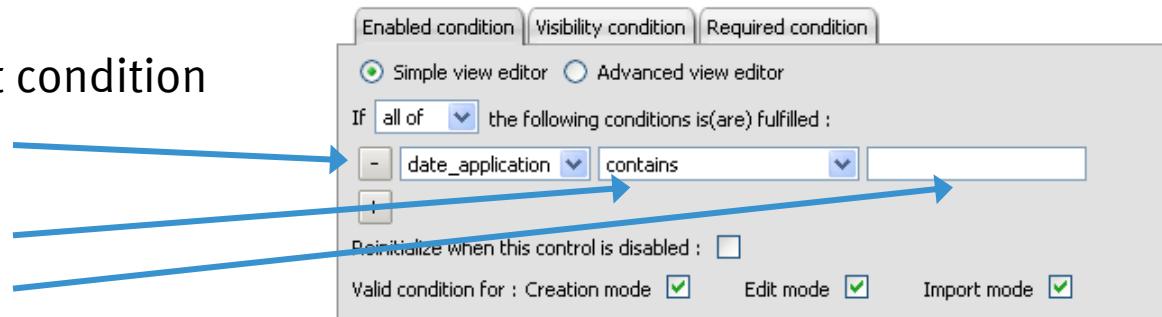
- You can add enabled/visibility and required conditions

To create a Properties dialogs: Conditions

- Conditions can be added to all controls in order to manage the display, the activation and the mandatory principles into properties sheets.
- By using the editors of conditions you can define whether the attribute is active or read-only.
- Select the simplified editor « Simple view editor » which will enable you to input a set of conditions.
- Then, select the operating value to use among various conditions:
 - All the : AND
 - At least one of : OR

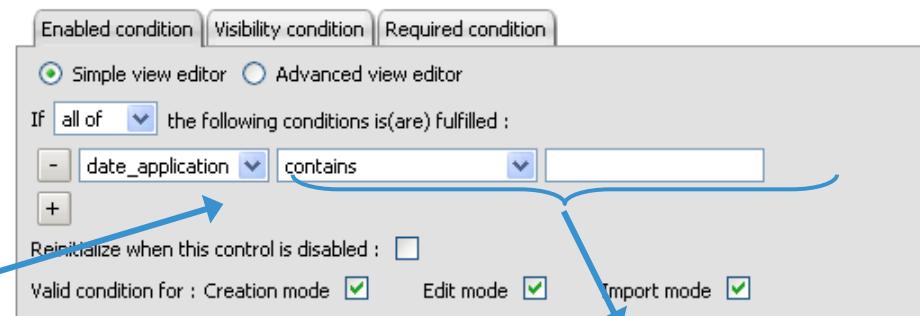


- Then click « + » to add the first condition
- Select the condition attribute
- Select the operator
- Enter the condition value



To create a Properties dialogs: Conditions

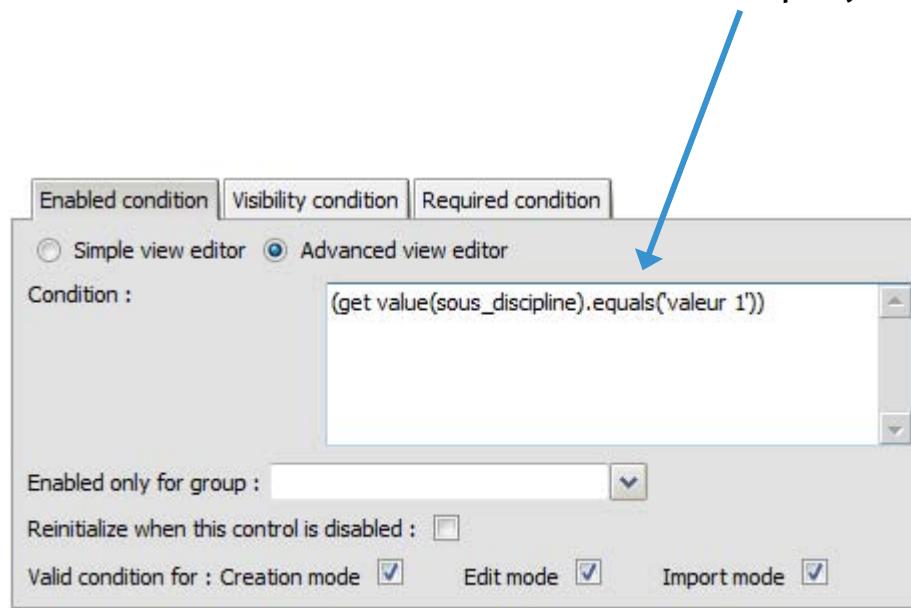
- If you want to add a condition click « + » and enter a new one
- If you want to delete it click « - »
- Check this box if you want the attribute value will be reinitialized when it is deactivated.



- Select modes affected by the validation of this condition by checking the boxes. There are three different display modes of the same sheet:
 - Creation : this mode is used when a new document is created.
 - Edition : this mode is used when a properties dialog of a document is created.
 - Import : this mode is used when document import in the base.
 - The attribute will be editable, wiewable and mandatory only if the mode box is checked and the condition verified. If there is no condition, the attribute will be activated on checked boxes mode and not display on others ones.

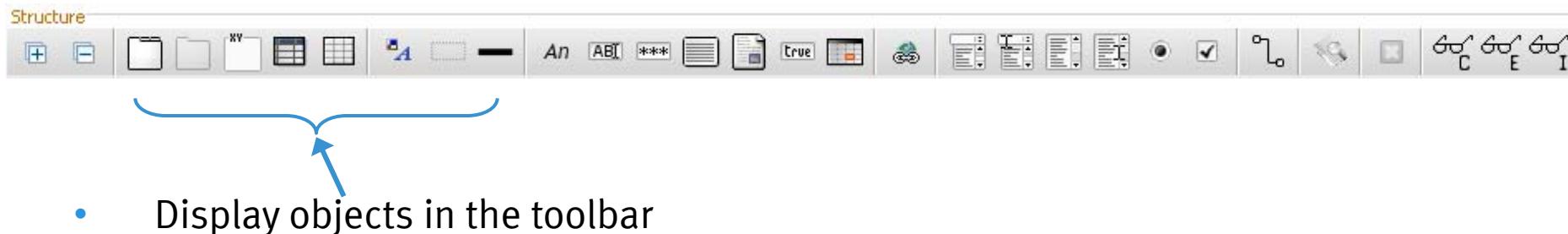
To create a Properties dialogs: Conditions

- The attribute can be modified, displayed or mandatory if the corresponding mode is checked and its condition is matched. If no condition is set, the attribute will be active on checked mode and not displayed for others.



Properties dialog display structure

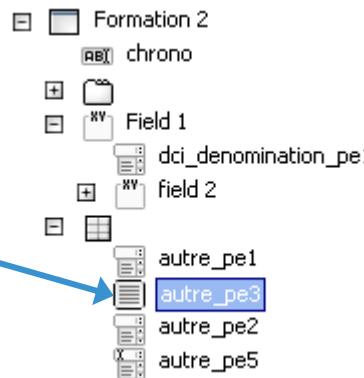
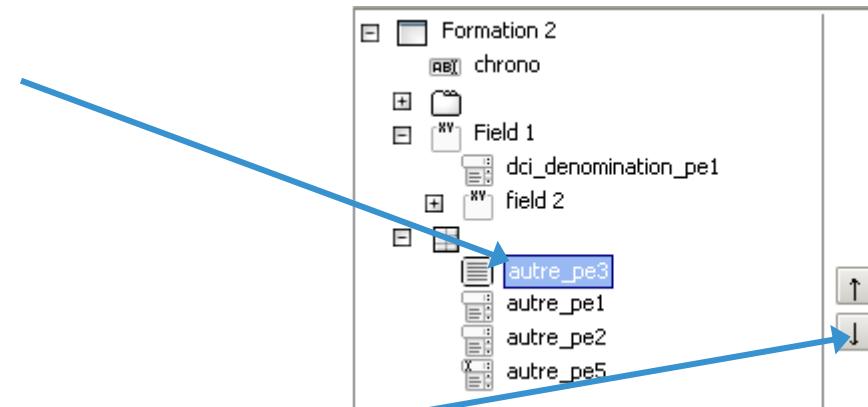
- In order to increase the legibility of the properties dialog, you can organize properties in objects
- Available objects are:
 - Tabs
 - Fieldsets
 - Grids
 - Columns
 - Blank objects
- You can also use a separator



Properties dialog display structure: to move an object

Click the object to move

- Click  to move it down in the tree
- Or on  to move it up



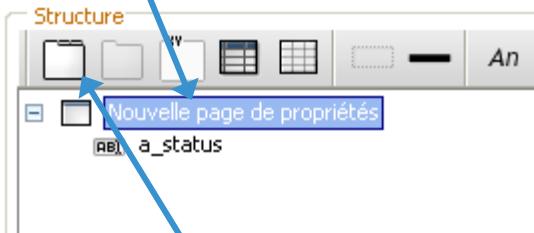
You can just move an object to the same level than itself in the tree with the arrows.



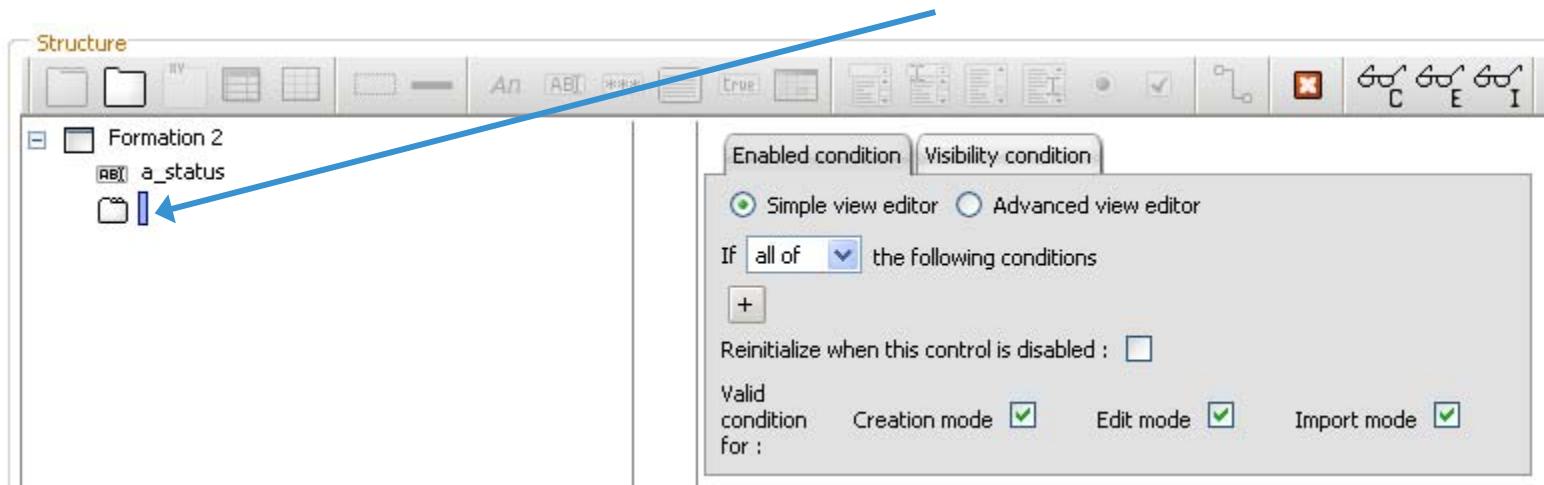
To move a property (or an object) into another object, use the drag and drop with the mouse

Properties dialog display structure: tabs

- Click the position of the tree where you want to insert it



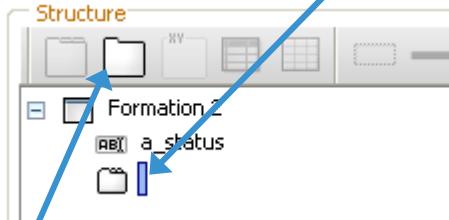
- Then click « Unit of tabs » and a set of tabs will be added in the tree



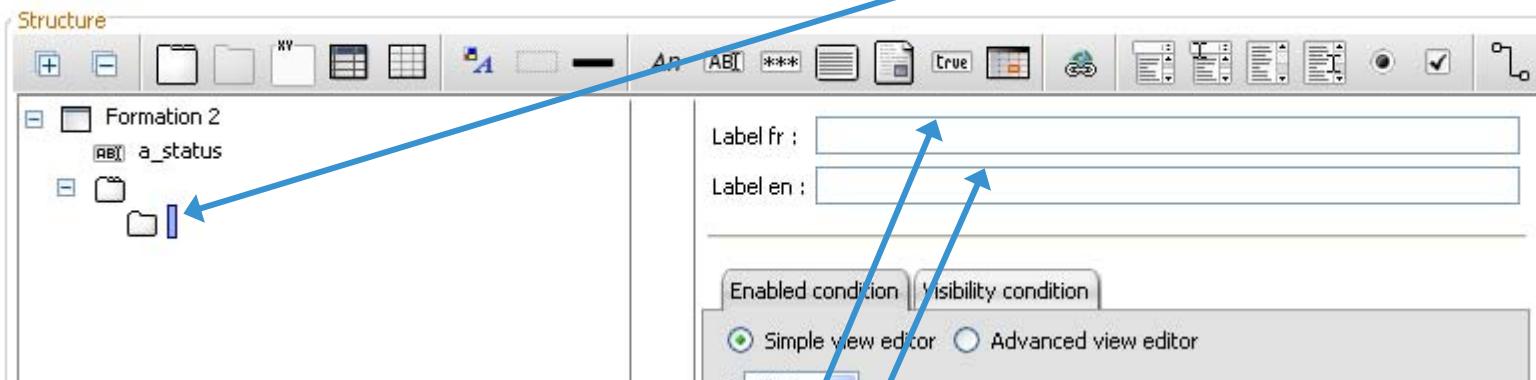
- Select enable and visibility conditions like for the other objects

Properties dialog display structure: tabs

- Once created, you can start to add tabs on it
You can only add tabs in a unit of tabs
Click in the tree on the object « Unit of tabs » already inserted



- Then click the tab object to insert the first tab



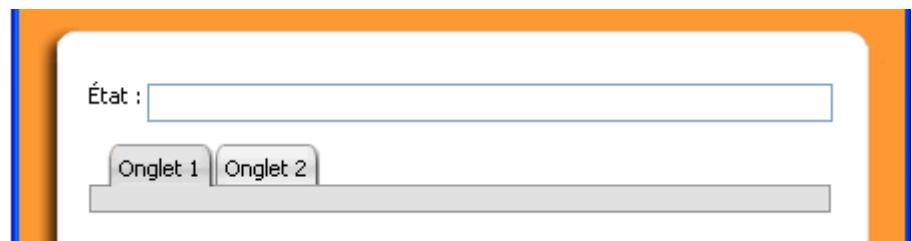
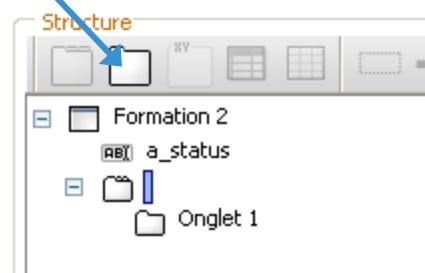
- Enter the name of the tab in All languages
- The enable and visible conditions and the reinitialization of properties configurations are identical to the previous ones

Properties dialog display structure: tabs

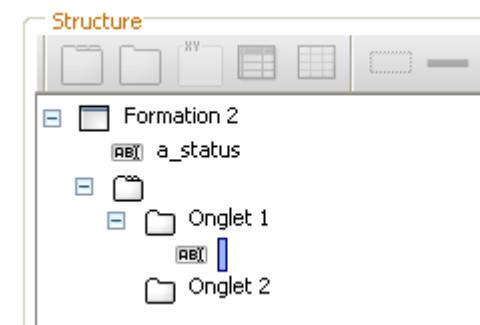
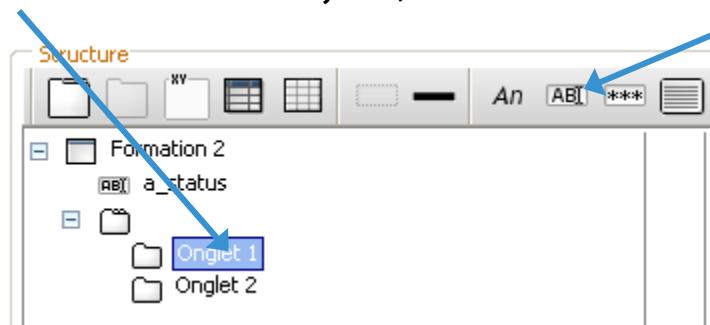
- The first tab is created



- You can create another one by selecting the unit of tabs then on tab



- Or you can add an object inside by selecting the tab object in which you want to insert the new object, then click the object to insert.

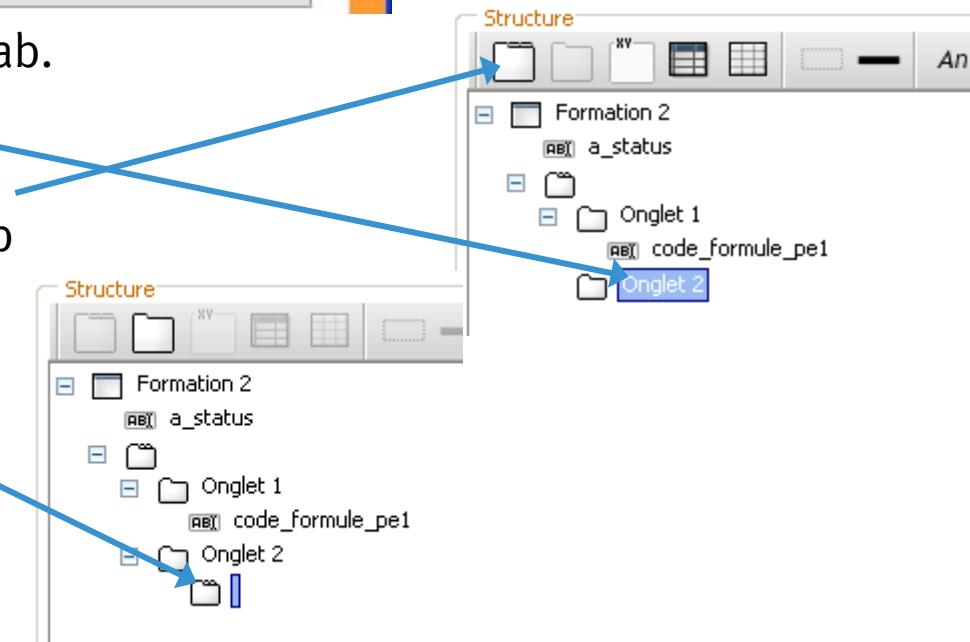


Properties dialog display structure: tabs

- The object is inserted in the tab

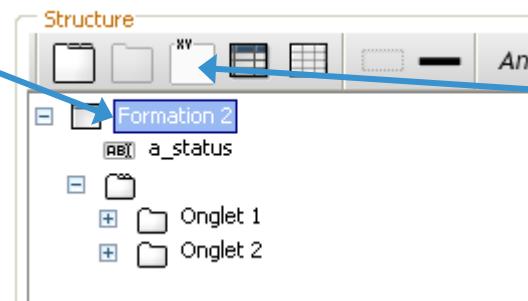


- You can also add unit of tabs in a tab.
To do that, click a tab
then on the object « unit of tabs »
- The unit of tab is inserted in the tab

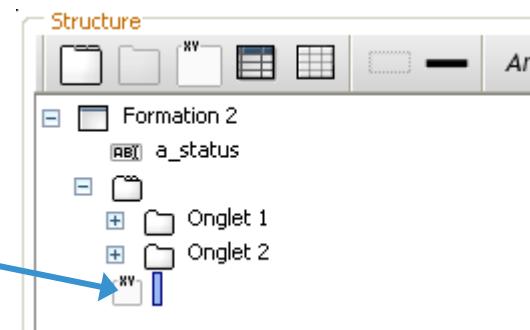


Properties dialog display structure: fieldsets

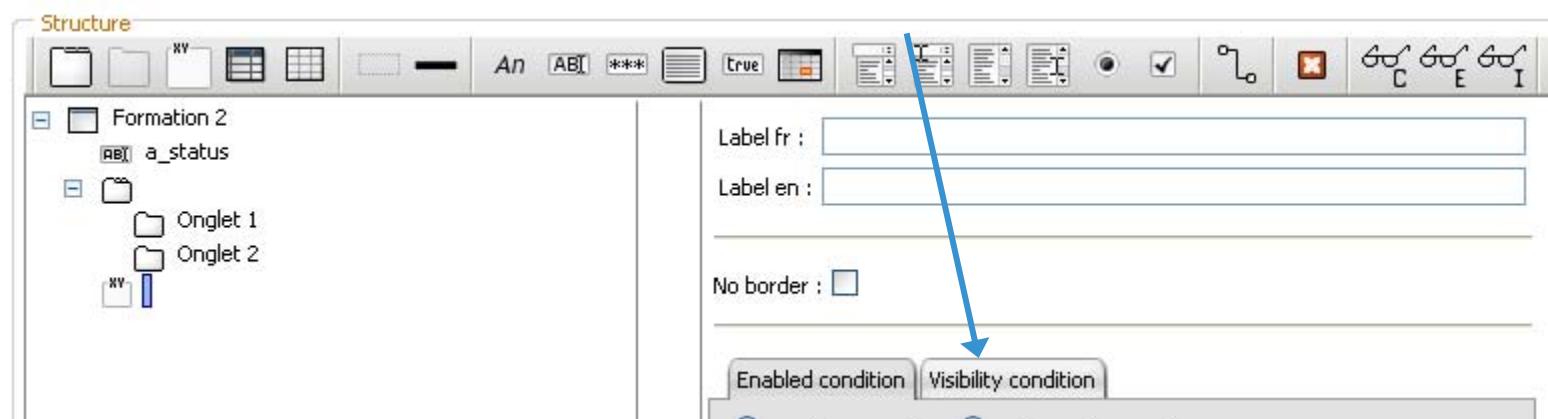
- Click the position of the tree where you want to insert it



- Click thefieldset icon

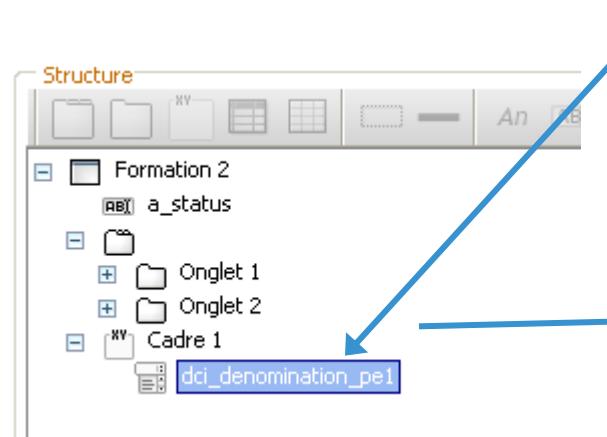


- It will be added at the end of the list of the selected level
- Enter the labels and the enable and visibility conditions



Properties dialog display structure: fieldsets

- Click it and insert an object inside



État : [Text Input]

Onglet 1 Onglet 2

Code formule : [Text Input]

Cadre 1

DCI - Dénomination : [Dropdown Menu]

Propriétés -- Dialogue de page Web

État : [Text Input]

Onglet 1 Onglet 2

Code formule : [Text Input]

Cadre 1

DCI - Dénomination : [Dropdown Menu]

Cadre 2

Autre : [Dropdown Menu]

Properties dialog display structure: grids

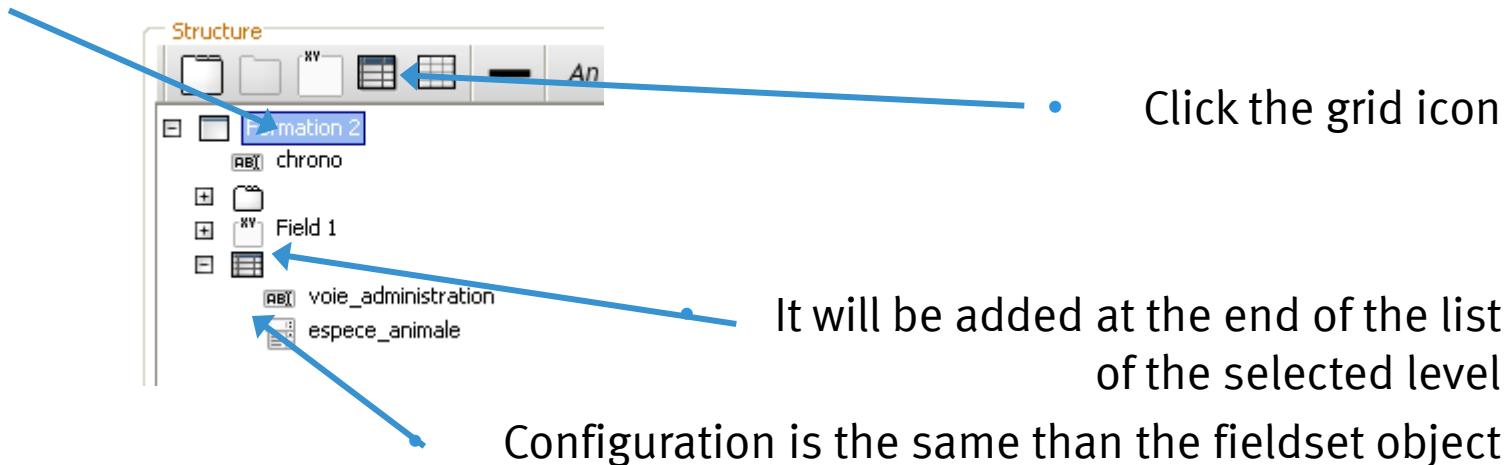
- Grid object make it possible to display properties in a grid in order to fill them together
- If you want to fill for example, for the same document and for all its modules :
 - *The module name*
 - *The creator name*
 - *The place of creation*
 - *The creation date*
- You can enter these in a grid

Module	Name	Place	Date
Module 1	Name 1	Place 1	11/08/2005
Module 2	Name 2	Place 2	18/08/2005
Module 3	Name 3	Place 3	25/08/2005

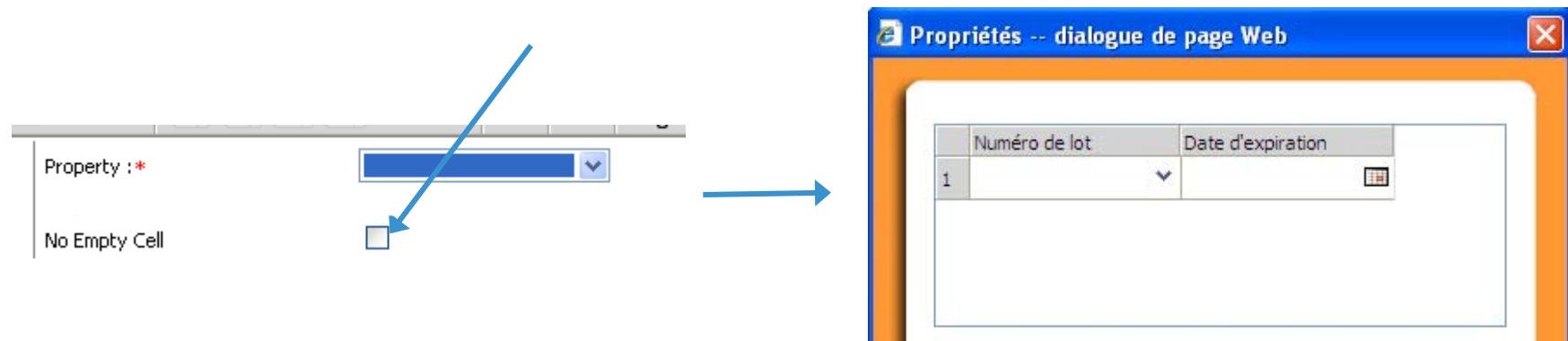
- The properties values will be :
 - Module : Module 1, Module 2, Module 3
 - Name : Name 1, Name 2, Name 3
 - Place : Place 1, Place 2, Place 3
 - Date : 11/08/2005, 18/08/2005, 25/08/2005

Properties dialog display structure: grids

- Click the position of the tree where you want to insert it

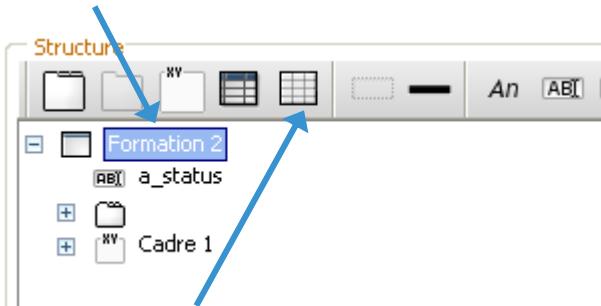


- The objects in the grid will have one more check box to deny empty cells

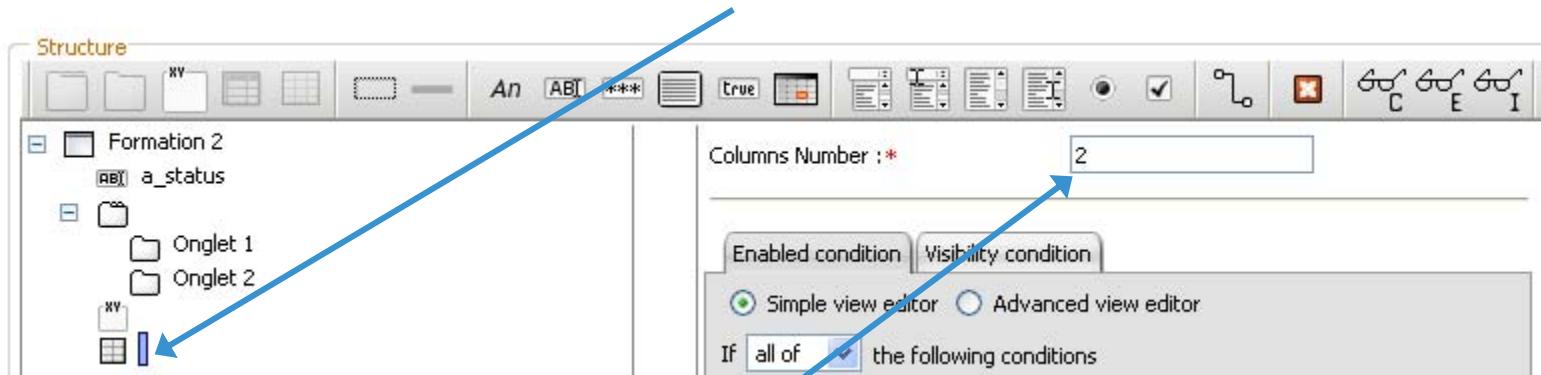


Properties dialog display structure: columns set

- A set of columns makes it possible to display several objects on the same line
- Click the position of the tree where you want to insert it



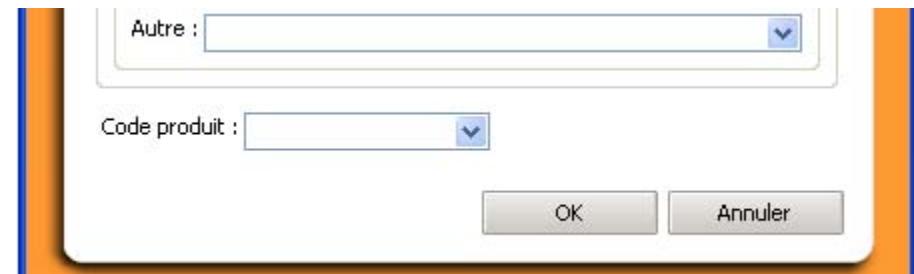
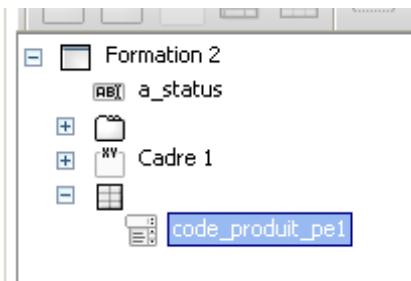
- Click set of columns to insert the object



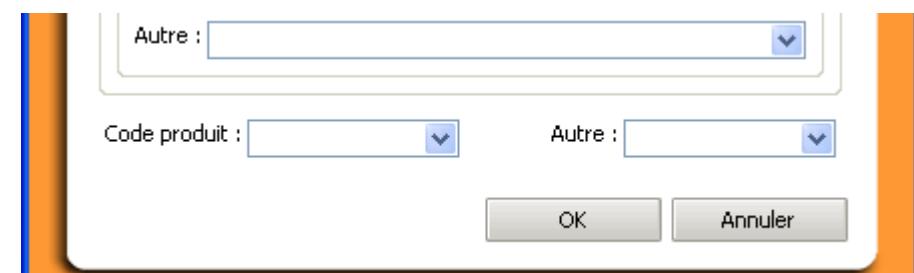
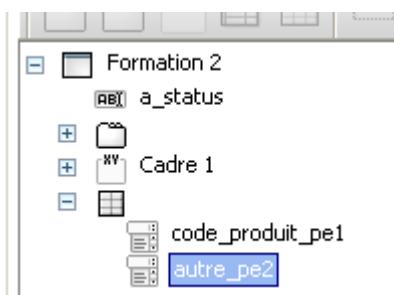
- Select the desired number of columns

Properties dialog display structure: columns set

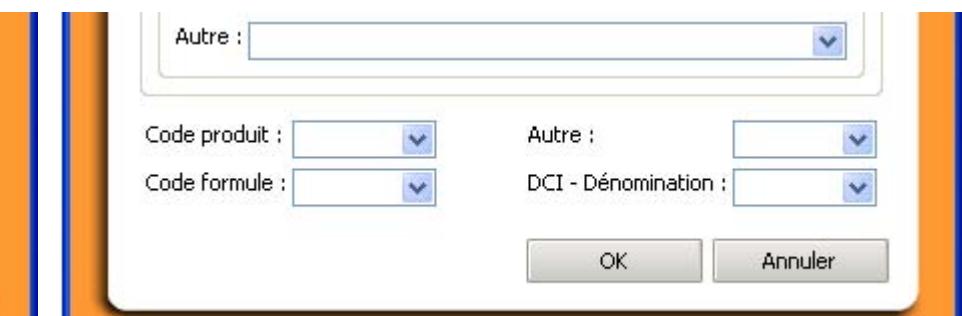
- Click the grid object and insert some objects inside



- 1 object

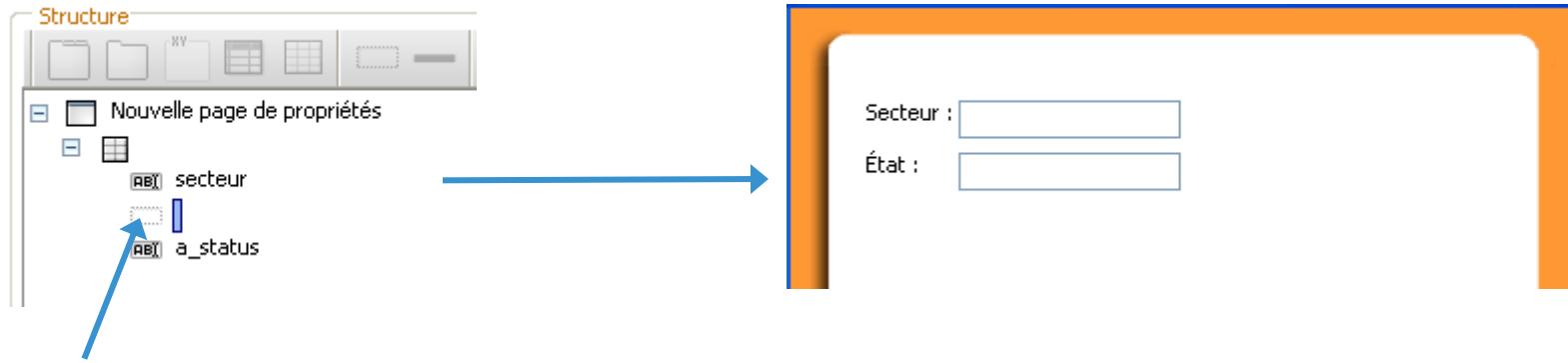


- 2 objects



Properties dialog display structure: columns set

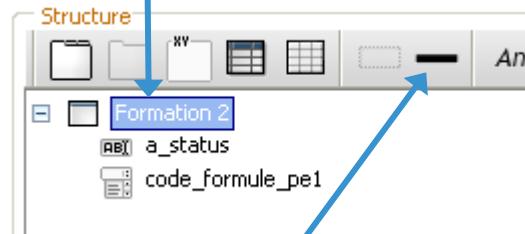
- You can insert a blank object in a column in order to have just one object in the line but that will not have the complete width of the property dialog



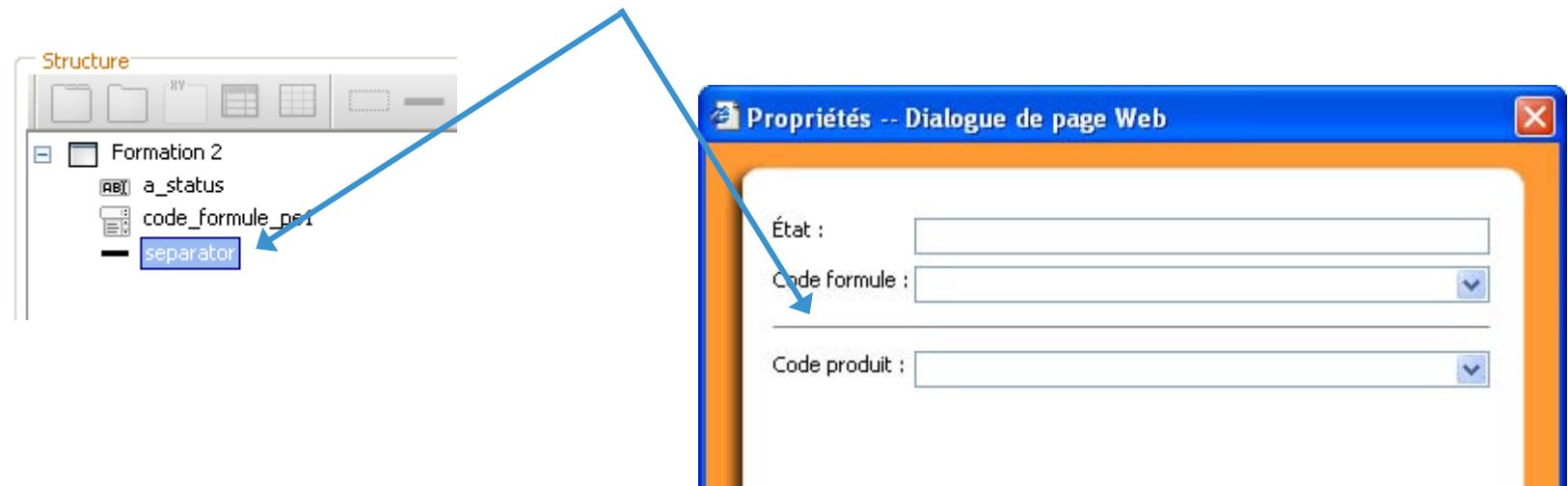
Blank object

Properties dialog display structure: separators

- Click the grid object and insert some objects inside

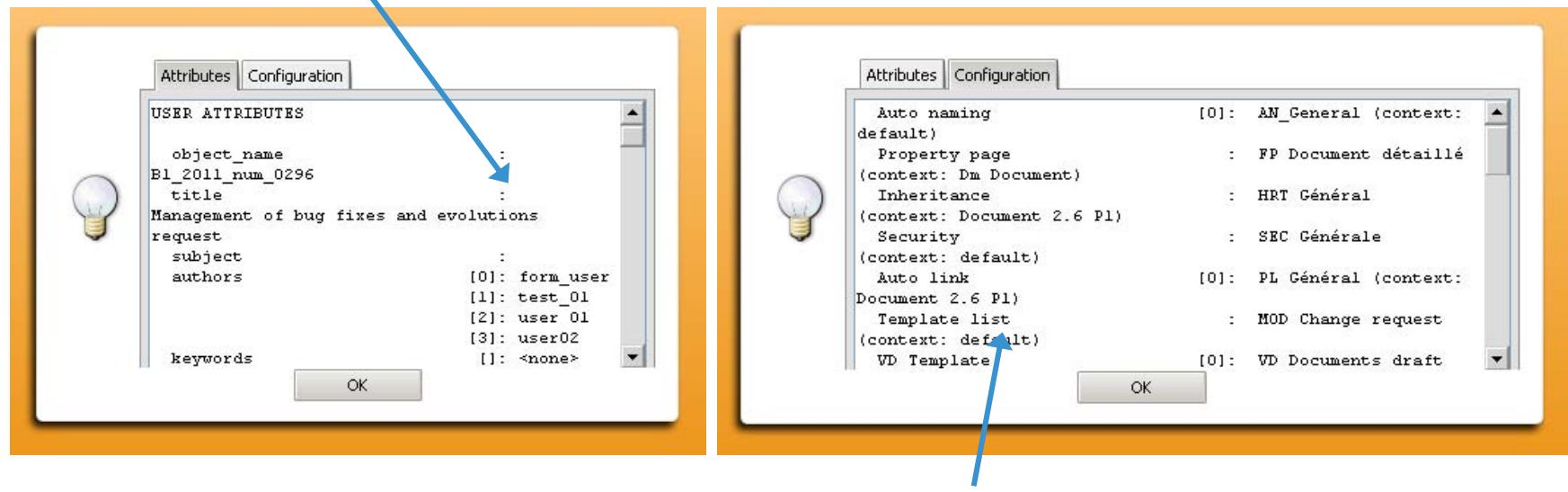


- Click the separator icon to insert it



Dump window and properties

- All the attributes linked to a repository object can be displayed using the following shortcut:
Ctrl + Alt + D
- All content properties can be viewed within this window including those which are not in the properties page. It is the case, for example, for the « r_object_id » and the others technical attributes



- Moreover, document configurations are also displayed into this page in order to quickly identify associated module and edit them if necessary.

Uniqueness Check

EMC²

Uniqueness Check

Within this screen it will be possible to control the uniqueness of your content, thanks to DQL qualification.

The screenshot shows a software interface titled "D2 > Uniqueness check". The top menu bar includes File, Data, Creation, Interface, P2, C2, D2-Bin, O2, P2eCTD, X3, Tools, Specifications, and Help. Below the menu is a toolbar with icons for Matrix, Go to..., New, Create from..., Save, Cancel, Delete, and a dropdown for "All elements".

The main area is titled "Properties" and contains the following fields:

- Name : * UN Default
- Description : (empty)
- Applications : 3.1.0
- Qualification* ?
dm_document where object_name='\\$value(object_name)'
- Message ?
Message fr : (empty)
Message en : (empty)

A sidebar on the left lists "Uniqueness checks" with "UN Default" selected. There are also buttons for + and x in the applications section.

Uniqueness Check

- Add a name, a description and eventually an application

The screenshot shows a 'Properties' section with three fields: 'Name : *' containing 'Test language_code directives', 'Description :', and 'Applications :'. There are blue arrows pointing from the first two list items to the 'Name' and 'Description' fields respectively.

- Then, input a DQL qualification as indicated below. You can use the « \$value » in this request as well as in messages which are associated with.

The screenshot shows a 'Qualification' table with two rows. Each row has a 'Qualification' field (containing DQL queries) and a 'Message' field (containing translated error messages). A blue arrow points from the second list item to the first row of the table.

Qualification* ?	Message ?
Qualification : directives where language_code='\\$value(language_code)' and sous_type='\\$value(sous_type)'	Message fr : Une directive '\$value(sous_type.Sous_type.fr)' existe déjà pour la langue \\$value(language_code.Langue.fr) Message en : A directive '\$value(sous_type.Sous_type.en)' already exists for the language \\$value(language_code.Langue.en)
Qualification : directives where title='\\$value(title)'	Message fr : Une directive existe déjà pour le titre \\$value(title) Message en : A directive already exists for the title \\$value(title)

- Then associate this uniqueness configuration to contexts into the configuration matrix. It is a multi check box and it can be associated with document type.
- This configuration will be taken into account when backup and modification of document properties.

Security

EMC²

Security models

- Security models make it possible to define dynamic ACLs that will be affected to contexts

The screenshot shows the D2 > Security interface with the following details:

Properties:

- Name : * SEC Générale
- Description :
- Applications : 3.1.0

Identifier: A blue arrow points from the 'Identifier' label to the 'Identifier' column in the table.

Conditions: A blue arrow points from the 'Conditions' label to the 'Conditions' column in the table.

Table Data:

Identifier	Conditions	Permissions
dm_world	+ Default	2-Browse
dm_owner	+ Default	7-Delete
authors	+ Default	6-Write
test310_1	+ a_status = Draft	6-Write
	+ Default	3-Read

Permissions Column:

- Change State
- Change Owner
- Change Permit
- Delete Object
- Change Folder Links
- Change Location
- Execute Proc

Identifiers, conditions and rights

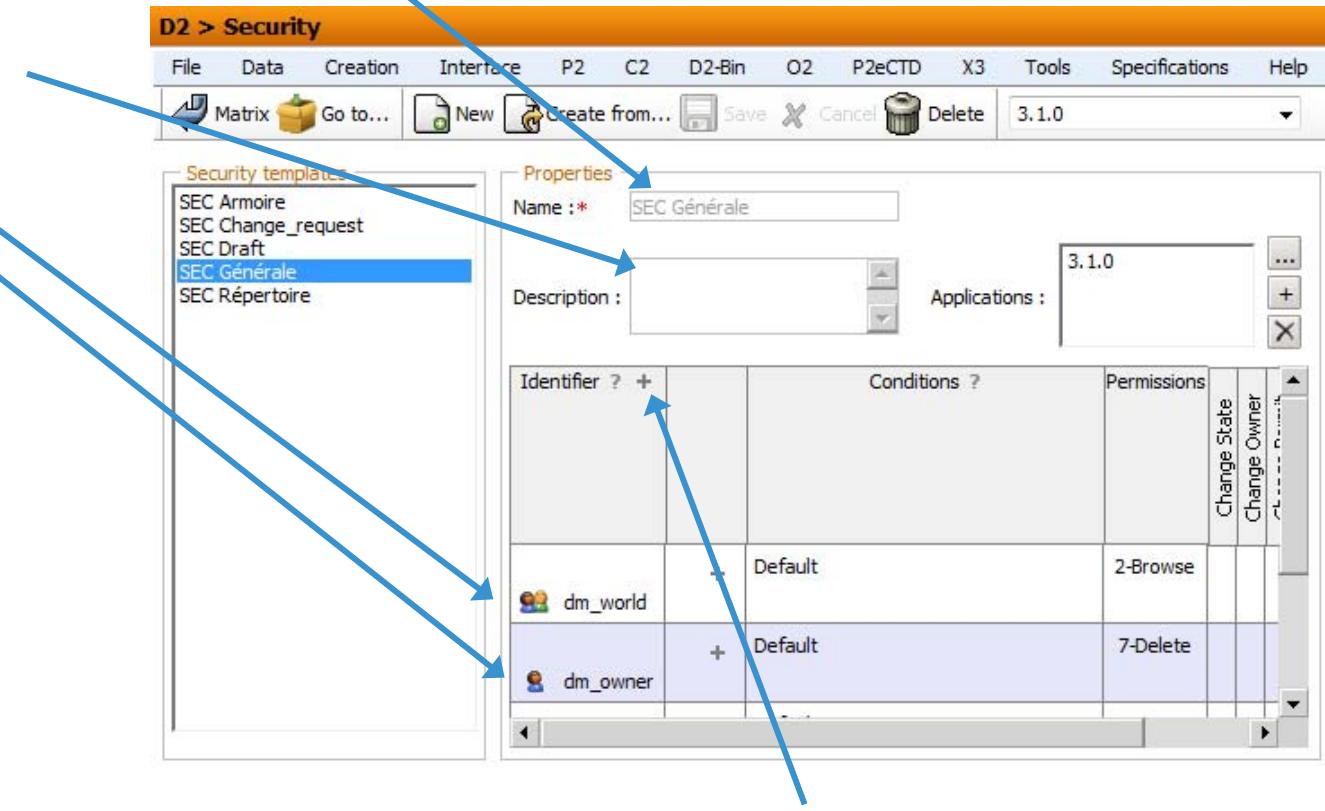
- You can configure several security models corresponding to the different contexts.
These models include a list of conditions according to following identifiers:
 - Given users
 - User groups
 - Properties
- Several conditions can be set to a user, a group or a property
- If several conditions match, the first one in the order of the list is applied
- It makes it possible to define three particular security models which allow to inherit rights of the creation folder, user or type.

To create a security model

- Click  and enter the name of the new security model

- Its description

- Both identifiers
dm_world
dm_owner
are mandatory



- To add a new identifier, click « + » and it will be added at the end of the list

To create a new identifier of a security model

- Select in the list the value of the identifier

A user
A group
A property

Identifier +	Conditions	Permissions	Change State	Change Owner	Change Permit	Change Location	Execute Proc
dm_world	+	Default 1-None					
dm_owner	+	Default 1-None					
x	+	Default 1-None					

- To remove a property, click « x »
- To merge text and property content for a DQL request: \$DQL('dql request') to merge two properties \$value(country)\$value(project)

The dialog box contains three dropdown menus. The top two dropdowns are empty. The bottom dropdown contains the text: grp_\$value(pays).

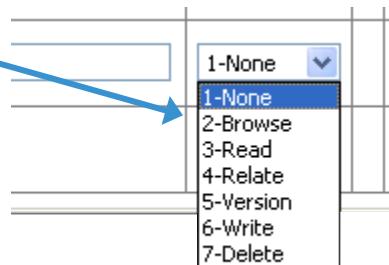
To create conditions for the new identifier

- Select the property of the condition

Identifier +	Conditions	Permissions	Change State	Change Owner	Change Permit	Change Location	Execute Proc
dm_world	Default	1-None					
dm_owner	Default	1-None					
x	<input type="button" value="a_application_type ="/> <input type="text"/>	1-None					

- Select the condition , its value and its rights

Rights list



To create conditions for the new identifier

- To add a new condition click « + » and a new condition will be added below this one

Identifier +	Conditions	Permissions	Change State	Change Owner	Change Permit	Change Location	Execute Proc
dm_world	+ Default	1-None					
dm_owner	+ Default	1-None					
administrateur_ar	+ sous_type = PARTIE_3 + a_application_type = <input type="text"/> + Default	4-Relate 1-None 1-None					

- To remove a condition click « x »
- The « Default » condition cannot be removed and will be taking into account if no one else matches

Conditions order for a new identifier

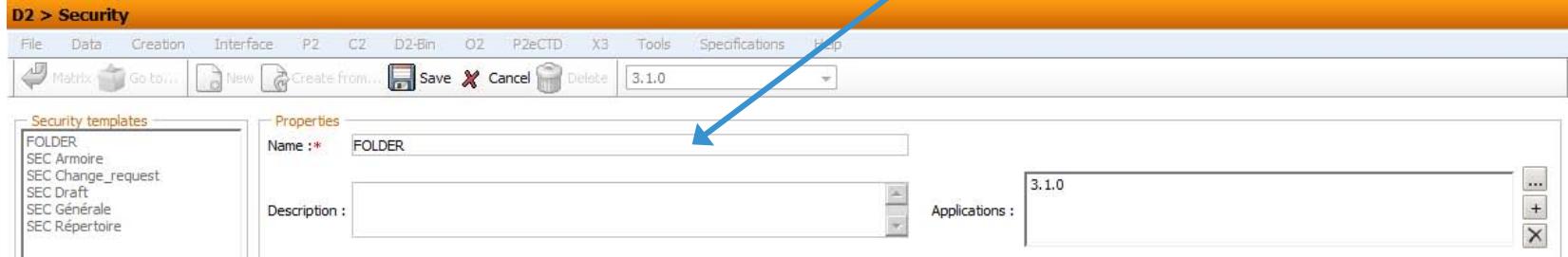
- Conditions order is important because the system applies the first one that matches
- To move a condition down, click

Identifier +	Conditions	Permissions	Change State	Change Owner	Change Permit	Change Location	Execute Proc
dm_world	+ Default	1-None					
dm_owner	+ Default	1-None					
<input type="button" value="x"/>	<input type="button" value="+"/> <input type="button" value="▼"/> <input type="button" value="x"/> sous_type = PARTIE_3	4-Relate					
<input type="button" value="x"/> <input type="button" value="+"/> <input type="button" value="▼"/> <input type="button" value="x"/> administrateur_ar	<input type="button" value="+"/> <input type="button" value="▼"/> <input type="button" value="x"/> a_application_type =	1-None					
	+ Default	1-None					

- To move a condition up click

Rights inheritance

- To inherit rights of the creation folder, enter « FOLDER » as name of the model



- Save it, then check this security model for a context. All content of this context will be created with the ACL of the creation folder
- This system is the same one for the inheritance of the rights of the user or the document type entering « USER » or « TYPE » as name of the security model.



In order that security is properly implemented, it is necessary to not associate the module with a set of content containing filters on groups.

Minimum rights for an action on content / folders

- In order to be able to create, modify, copy content, minimum rights for the user and the « super user » are required
- These rights are summarized in the following tables :

Repository type		Creation of folder / document		Removal	
		Parent folder	Object	Parent folder	Object
Without "folder security"	Super user	none		none	delete
	user	browse		browse	delete
With "folder security"	Super user	write		write	delete
	user	write		write	delete

Repository type		Cut / Paste (Move)			Copy / Paste (Duplicate)		
		Parent folder	Destination folder	Object	Parent folder	Destination folder	Object
Without "folder security"	Super user	none	none	write	none	none	read
	user	browse	browse	write	browse	browse	read
With "folder security"	Super user	write	write	write	read	write	read
	user	write	write	write	read	write	read

To modify a security model

- If you want to modify a security model, this will have consequences on the new created content but also on the ACL of the content already created with this model before changes
- Modifications with repercussions on all content already created
 - Modify the security model and do not modify the configuration matrix
 - The new model will be applied to all new created content
 - The system will run a job in background to modify all the ACL of previously created content
- Modifications without repercussions on all content already created except if they are modified manually
 - Copy the security model on another name and modify it
 - Check off the model in the configuration matrix for the desired set of content and check on the new security model
 - The new model will be applied on all new created content
 - The new model will be applied to old document (created before the model modification) if you save it, change one of its properties or check it in

To modify a security model

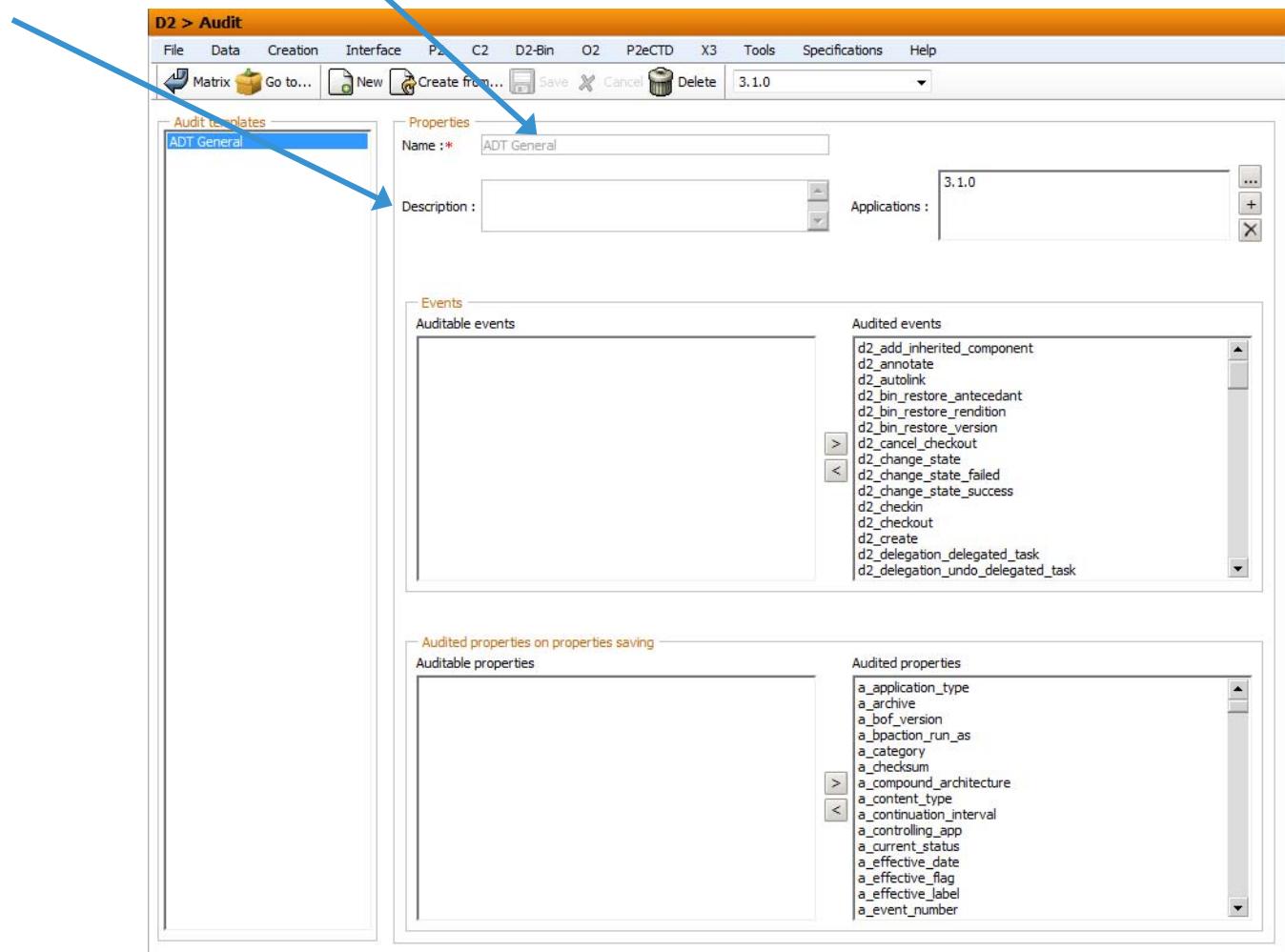
- Modifications without repercussions on already created content
 - Copy the security model on another name and modify it
 - Create a new context of content identical to the one on which you add this model applied and add the condition `r_creation_date > 'date of the day'` to identify the new content that will be created for this set
 - Put this context just before the existing one in the creation matrix
 - Check on the new security model for this new context
 - The new model will be applied for each new created content
 - The old model will be kept on the old content (created before the model modification) even if they are modified

Audit

EMC²

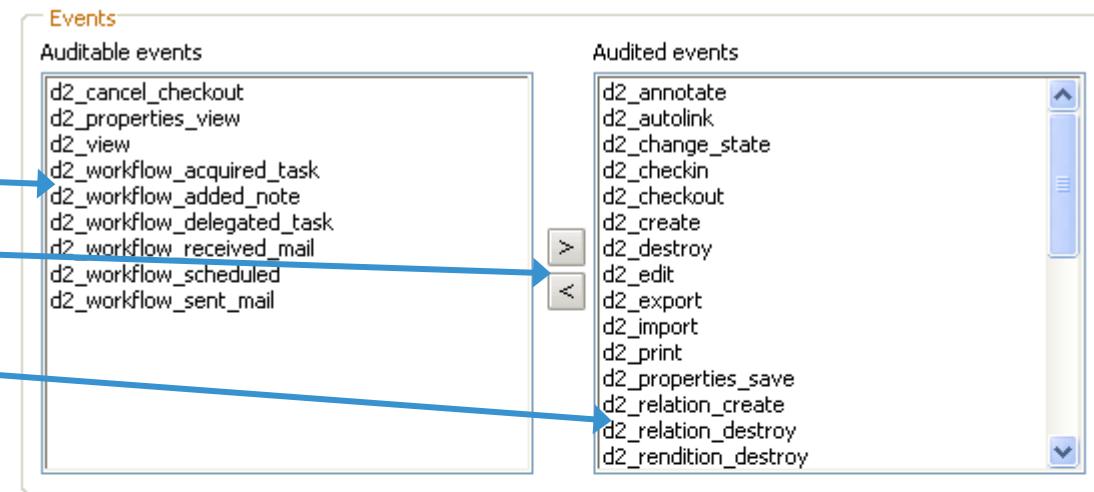
Audit

- You can configure the audit events
- Click  and enter the name of the new audit configuration and its description

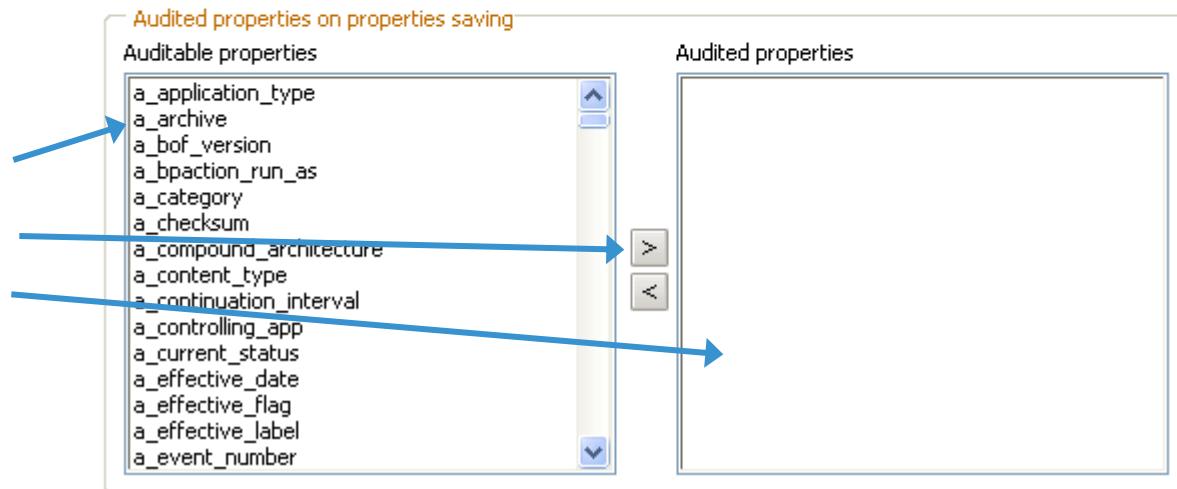


Audit

- Select an event to audit in the list
- Click « > » to add it in the list of events to be audited
- You can add several



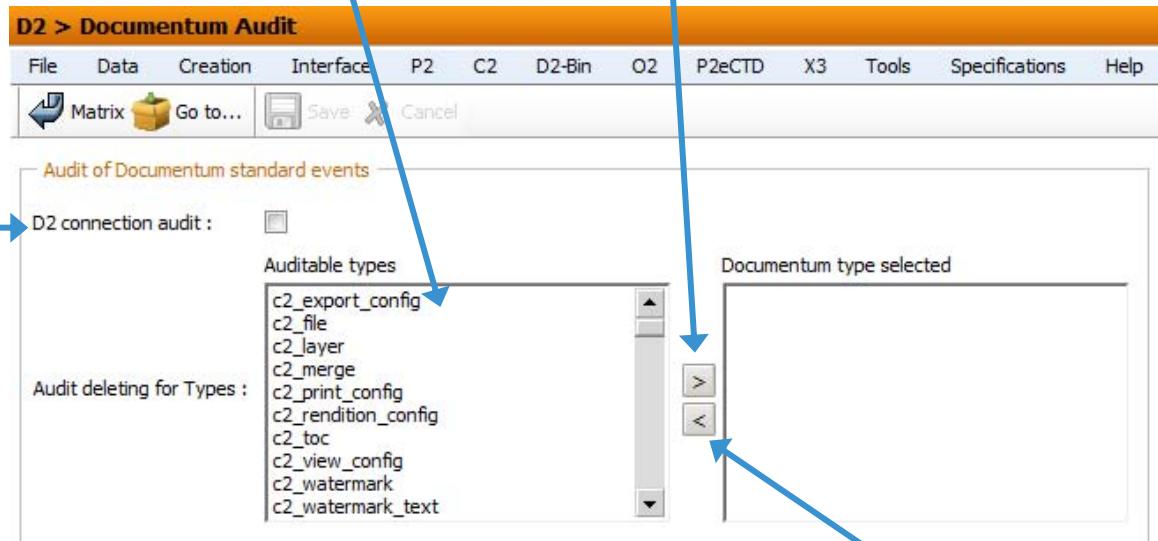
- Select a property to be audited in the list
- Click « > » to add it in the list to be audited
- Click Enregistrer to save



Audit the remove 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



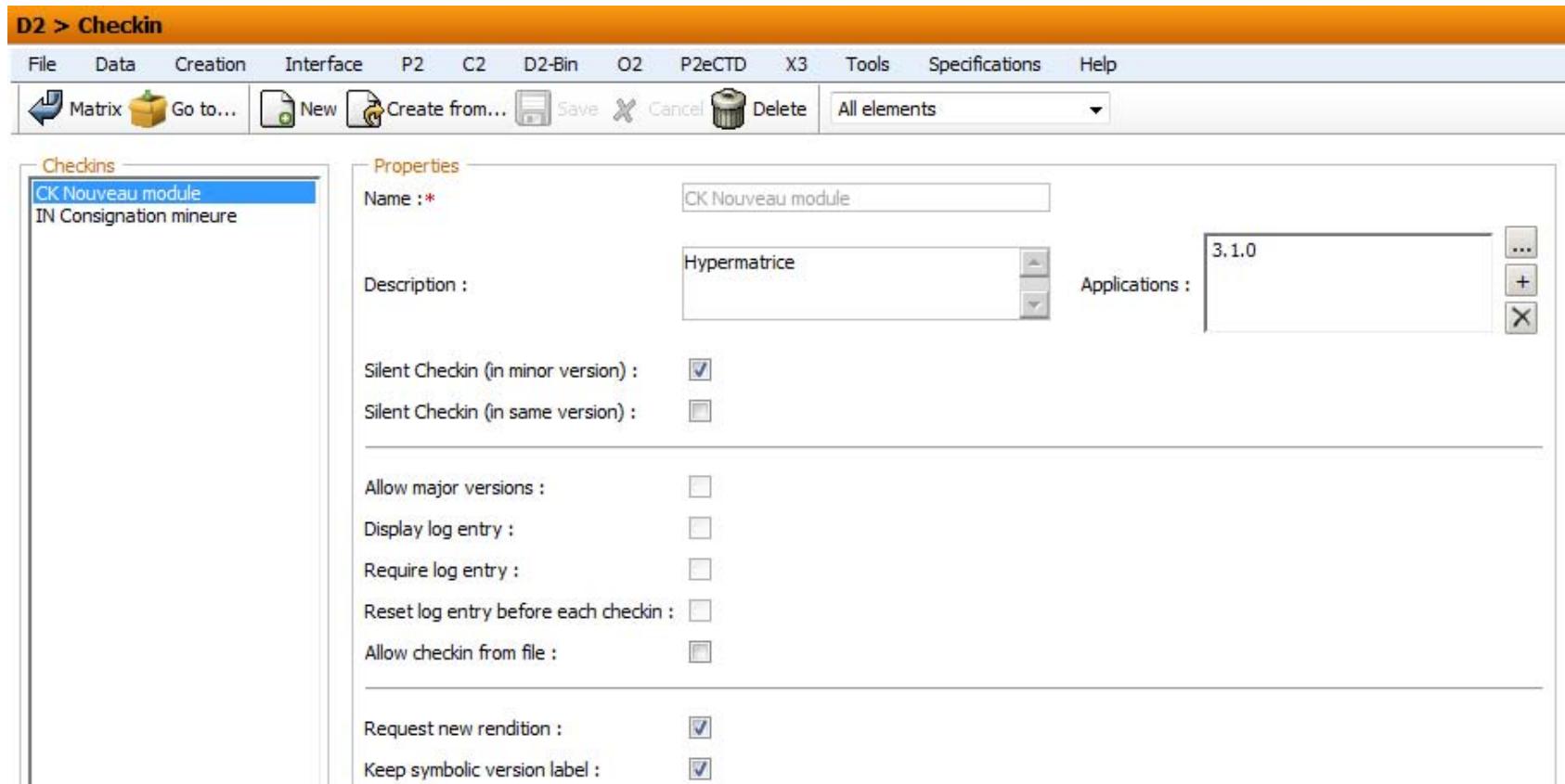
- To remove one, click it in the right hand side list and then on « < »

Checkin and Checkout

EMC²

Checkin

- You can configure several settings of checkin that you will affect to context
- The configuration screen for checkin is the following:



To create a new Checkin configuration

- Click  and enter its name and description

Properties

Name :*	New checkin
Description :	<input type="text"/>
Silent Checkin (in minor version) :	<input type="checkbox"/>
Silent Checkin (in same version) :	<input type="checkbox"/>

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

- | | | |
|---------------------------|--------------------------|--|
| Allow major versions : | <input type="checkbox"/> | Check this box to authorize checkin in major version |
| Display log entry : | <input type="checkbox"/> | Check this box to use checkin description. Display the property « log entry » to fill it |
| Require log entry : | <input type="checkbox"/> | Check this box to make the checkin description mandatory |
| Allow checkin from file : | <input type="checkbox"/> | Check this box to authorize the checkin from file |
| Request new rendition : | <input type="checkbox"/> | Check this box to request a new rendition |

- Check this box to request a new rendition

Checkout

- You can configure several checkout settings that you will apply to different context
- The configuration screen for checkout is the following:

The screenshot shows the 'Checkout' configuration interface in a software application. The top navigation bar includes 'File', 'Data', 'Creation', 'Interface', 'Tools', and 'Help'. Below the bar, there are standard file operations: Matrix, Go to..., New, Create from..., Save, Cancel, Delete, and a dropdown menu set to '3.1.0'. On the left, a sidebar titled 'Checkouts' lists items: 'OUT Document_applicable' (selected) and 'OUT Version_antérieure'. The main panel is titled 'Properties' for 'OUT Document_applicable'. It contains the following fields:

- Name :** OUT Document_applicable
- Description :** (empty text area)
- Applications :** 3.1.0 (with a '+' button to add more)
- Allow checkout :**

Below these, under the 'Message' section, there are two warning message sections: one for French ('Fr') and one for English ('En'). Both sections have a 'Warning message' checkbox () and a message text area:

- Fr :** Ce document est 'Applicable', en le modifiant vous le soumettez de nouveau à un circuit de validation
- En :** Ce document est 'Applicable', en le modifiant vous le soumettez de nouveau à un circuit de validation

At the bottom, under 'Xml Applications', there are two checkboxes:

- Checkout range :** All, root and descendants
- Checkout support documents as well :**

To create a new Checkout configuration

- Click  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

- Enter the message :

- In French
- In English

- Click  to save

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 ?

Warning message En :

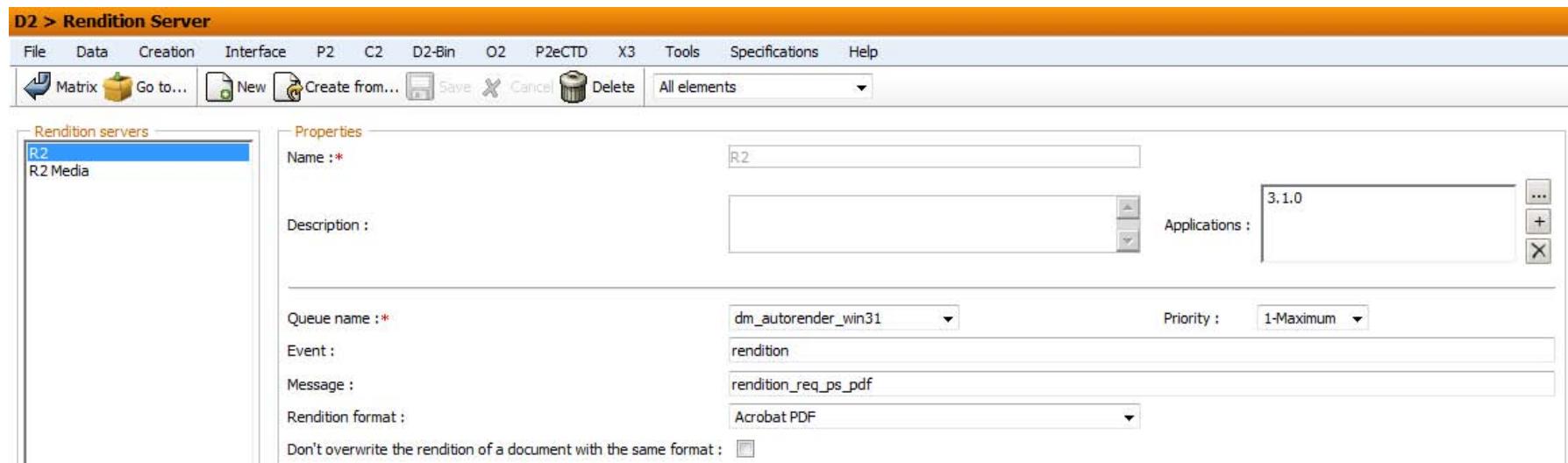
Warning, this document is
approved.
Creating a new version
of this document could generate an inconsistency
if it is used in some virtual documents.
 Would
you like to continue ?

Rendition

EMC²

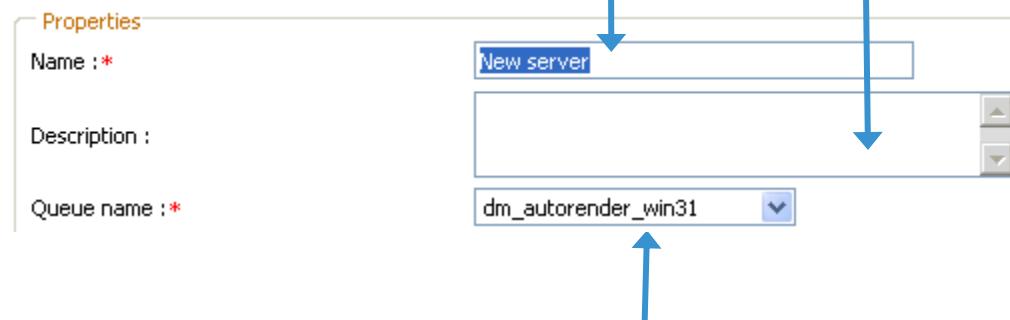
Rendition servers

- You can configure several rendition servers that you will apply to different context
- The configuration screen of rendition servers is as following:

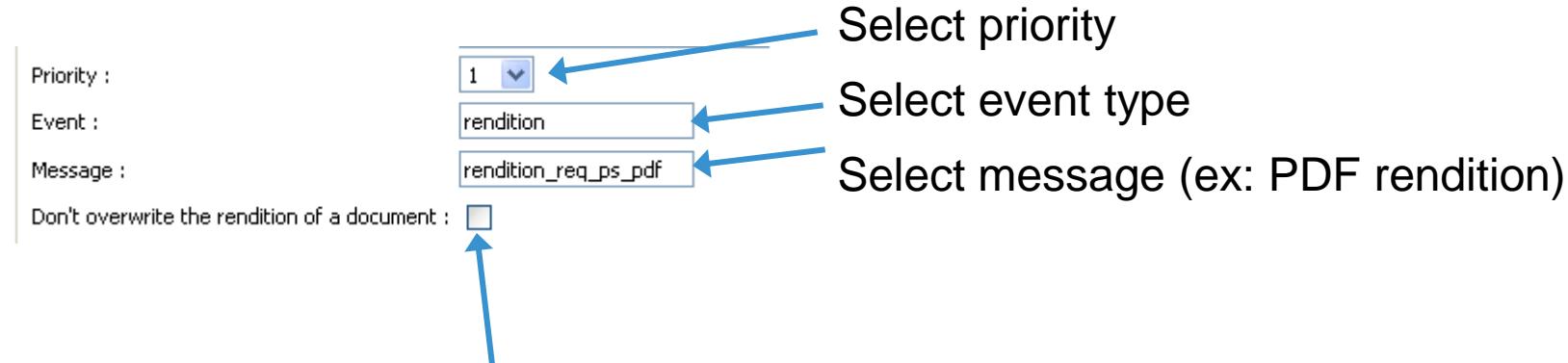


To create a new rendition server

- Click  and enter its name and description



- Select the desired queue for the server



The screenshot shows a configuration dialog box with the following fields and options:

- Priority :
- Event :
- Message :
- Don't overwrite the rendition of a document :

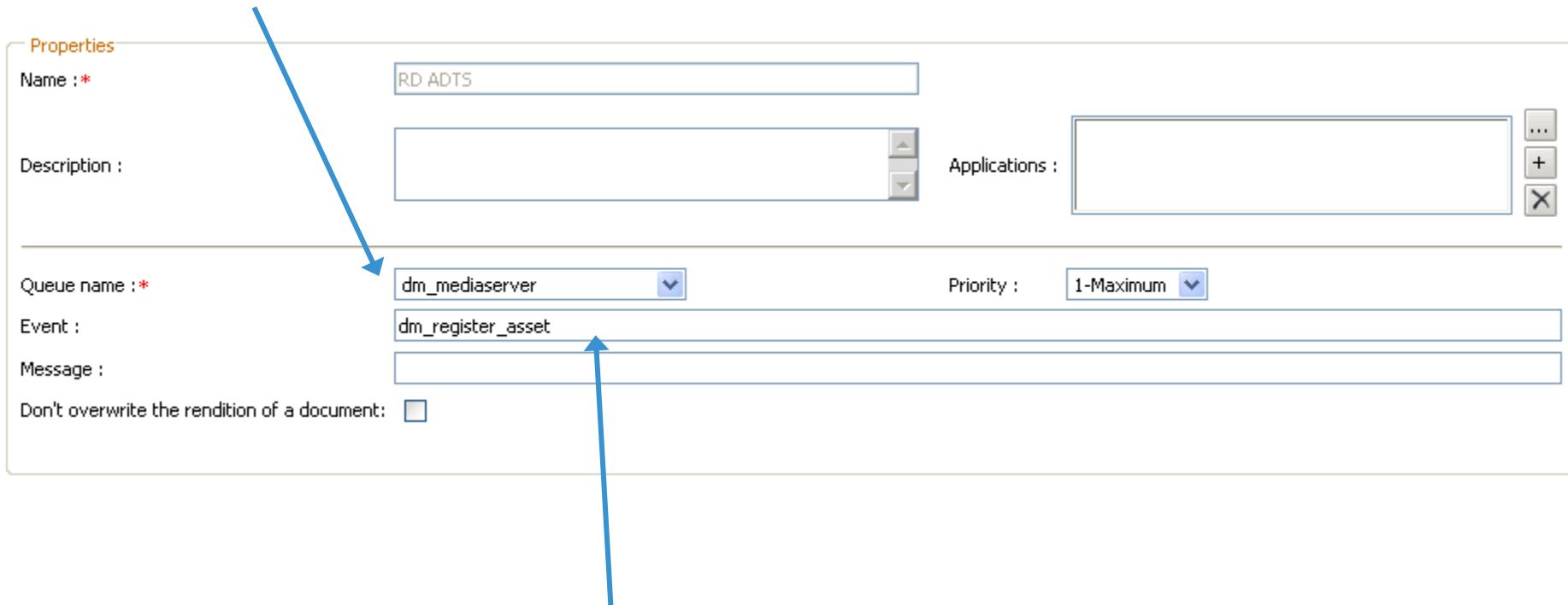
Blue arrows point from the list items to the corresponding fields in the dialog box, with labels indicating the selection process:

- Select priority
- Select event type
- Select message (ex: PDF rendition)

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

To create an ADTS rendition server

- An ADTS rendition server must be configured to use the thumbnail view mode
- Select the queue: dm_mediavserver



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

Mailing

EMC²

To configure mailing lists for sending mail job

- D2 includes a job to send mails mailing list configuration done in the main configuration matrix

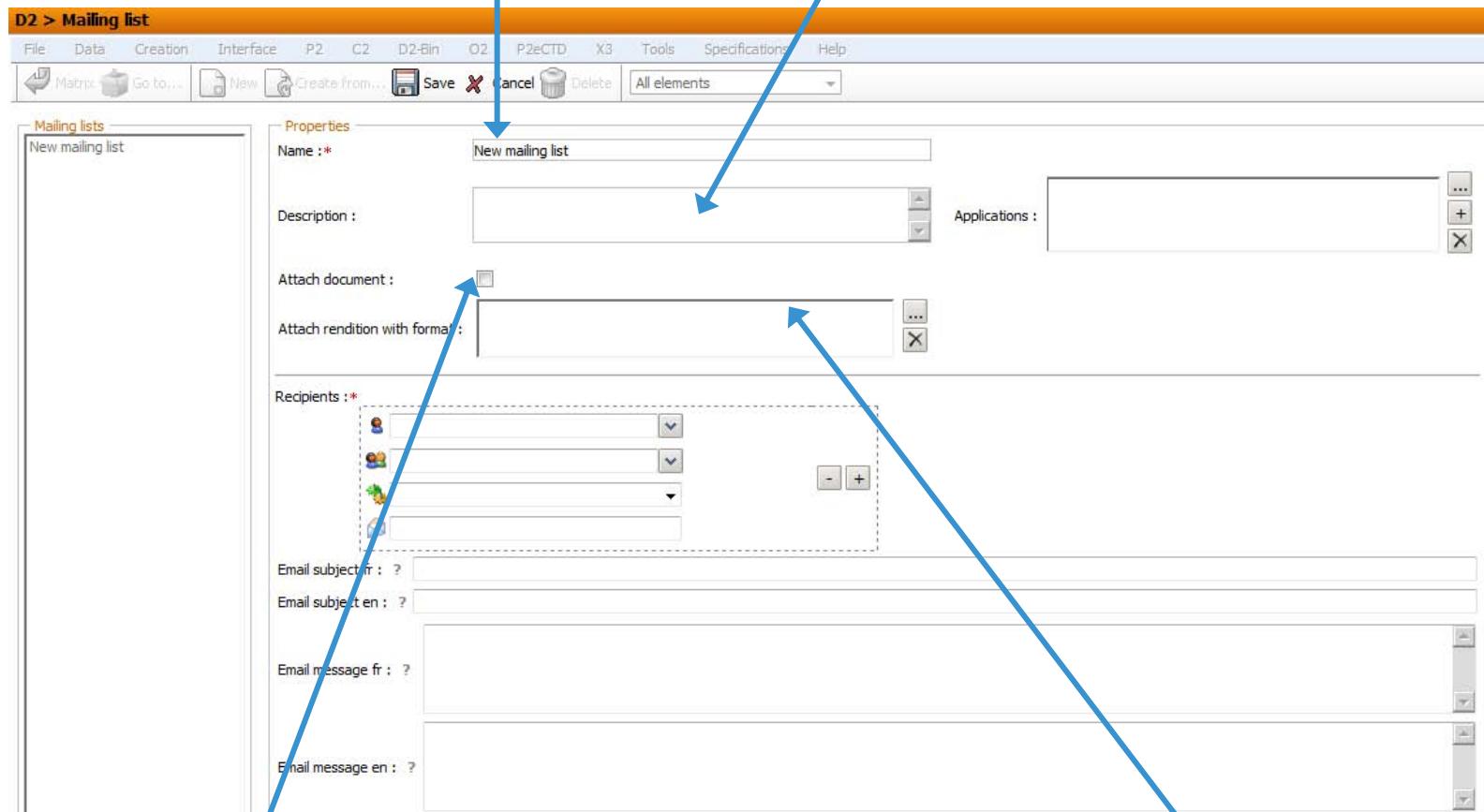


Armoire et répertoire	Directive	Instruction	Procédure	test subscription	Documents Draft	Documents En revue	versions antérieures_1	Document Applicable	Document obsolète	Documents Approuvé	Document 2.6 P1	Mail	Change request	Groupe manager	Groupe qualité	Groupes managers et qualité	Répertoire applicable	Default
Nouvelle configuration de recherche																		
Nouvelle configuration de recherche sur DQL																		
	New query form																	
	Nouveau formulaire de recherche																	
	AT Workflow																	
	Nouveau modèle d'audit																	
	RD ADTS																	
	RD PDF																	
	ML Document obsolète																	
	AB Annotations_applicable																	
	AB Modification																	

- When the job is triggered, it applies all mailing lists to the selected contexts
- ex: in the example, it will send an email to each user configured in the mailing list 1 for each document that match the context « AR Approved ou Signed »

To configure mailing lists for sending mail job

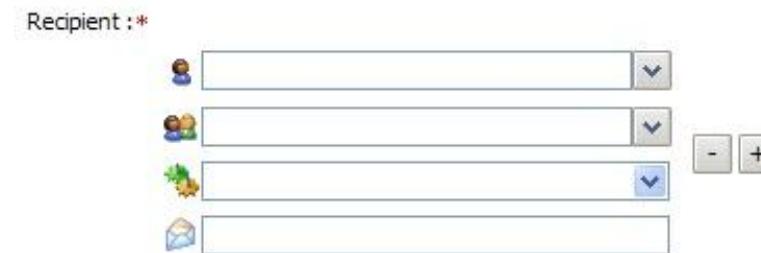
- To configure a new mailing list, click  in the configuration matrix
- Enter the mailing list name and its description



- Check the box if you want to join the document (or a rendition)

To configure mailing lists for sending mail job

- Then choose a recipient in the list
or a group
or the content of a property
or enter an email address
- Click « + » to add one
- Then select another recipient
- To remove one, click « - »
- Enter the subject of the email (in installed languages)



- Then the object of mail
- The mail will be sent to users in the language of their preferences (specified in D2-Client options)

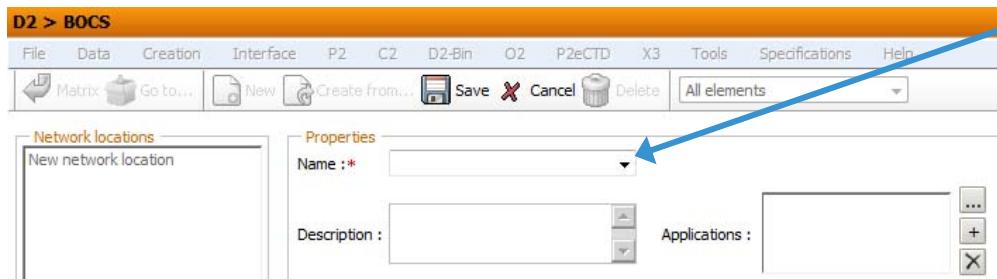
A screenshot of a software interface showing two language options for a mail object. On the left, there are two sections: "Mail object fr :" and "Mail object en :". The "Mail object fr :" section contains the text "Le document \$value(object_name) a été validé : Cliquez ici pour allez sur le document ". A blue arrow points from the text in this section to the "Mail object fr :" label. The "Mail object en :" section contains the text "The document \$value(object_name) has been validated: Cliquez ici pour allez sur le document ".

BOCS

EMC²

To manage BOCS

- After the installation and configuration of the BOCS elements, configure your BOCS into D2-Client.
 - A list of available BOCS displays in the combo-box « Name »



- Make the association into the configuration matrix between the contexts and the Bocs configuration saved
 - Content from the repository and part of the content sets marked will be associated to BOCS and to user networks

BOCS are supported only
synchronous write

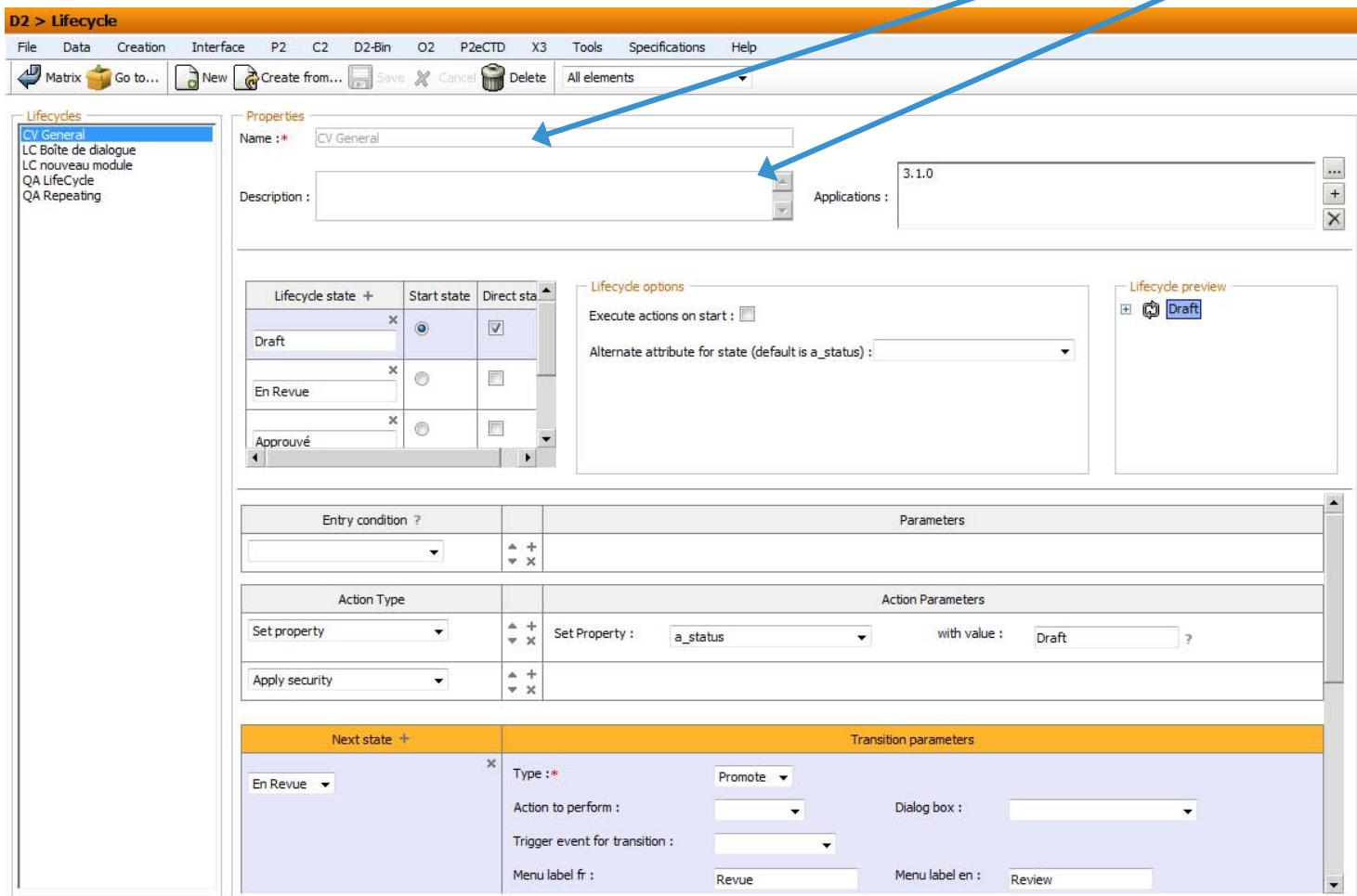
Lifecycles

Lifecycles

- A lifecycle can be represented by a set of states linked together by transitions.
For each state you can configure:
 - Entry conditions in the state
 - Condition on property
 - Condition on virtual document
 - Condition on permissions
 - Condition on the belonging to a group
 - Condition on linked content
 - Actions to execute when going to the next step :
 - To fill a property
 - To apply the state to components of the VD
 - To create a new version
 - To remove the version
 - To apply auto naming
 - To apply security
 - To request a rendition
 - To take snapshot
 - To work off-line
 - To apply method
 - To send mail
 - To apply autolink
 - To change linked document state
 - To change previous version state
 - The next steps with transitions settings towards these states:
 - Action to execute during the transition towards these states
 - Event starting the transition
 - Label of the menu in D2
 - Messages

To create a lifecycle

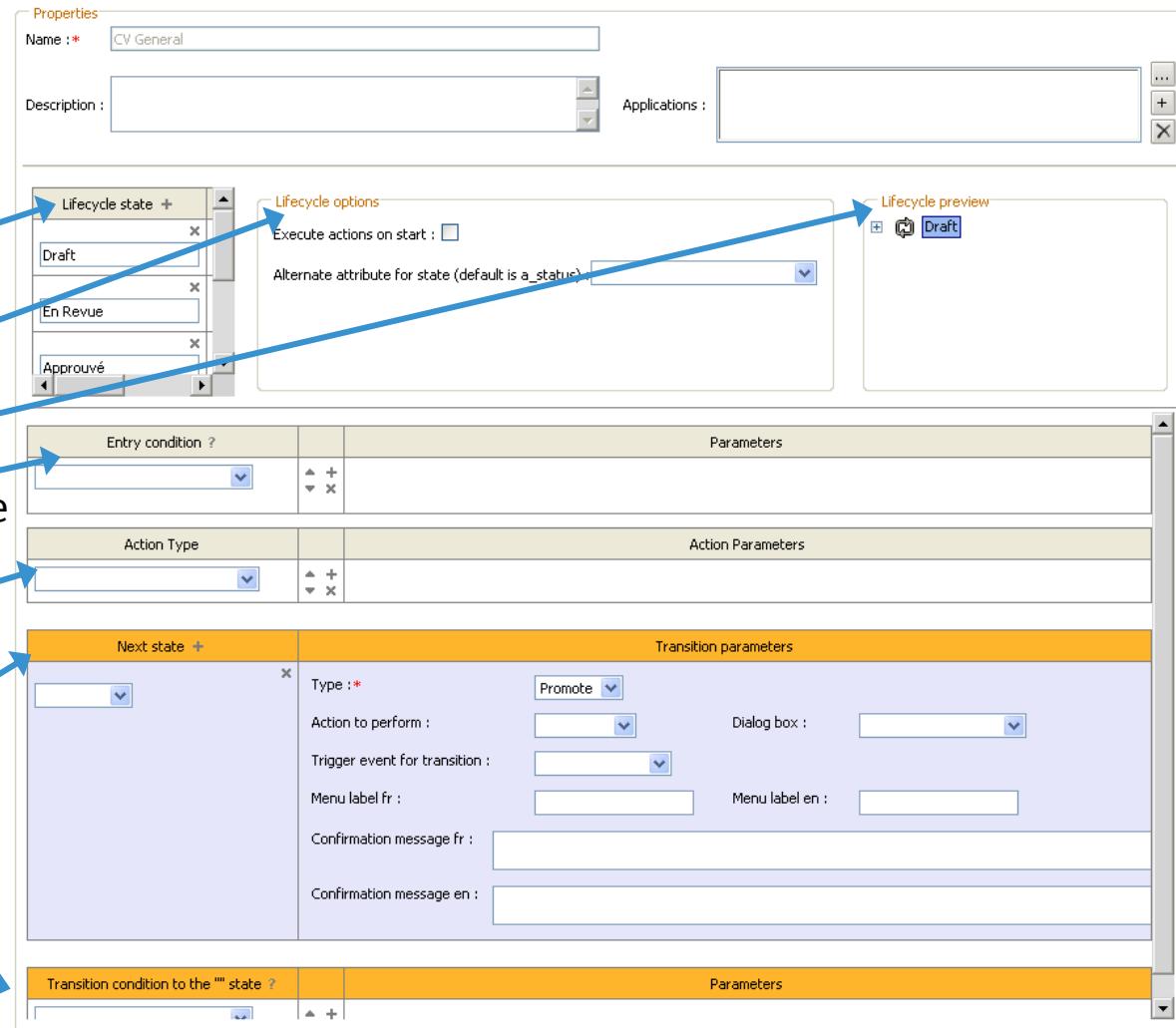
- Several lifecycles can be created and applied to context in the general configuration matrix
- To create a new lifecycle click  and enter the name and description



To create a lifecycle

Lifecycle configuration screen:

- Lifecycle name
- States list
- Lifecycle options
- States sequences
- Entry conditions in the state
- Actions in the state
- Listing of following states
- Entry conditions in the following states

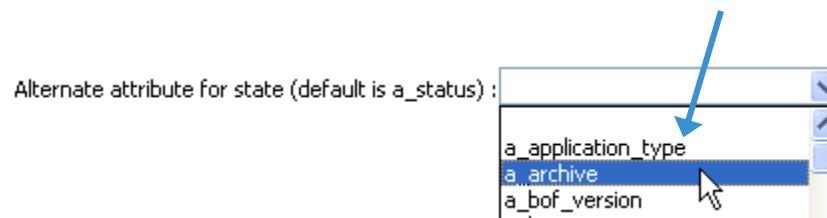


To create a lifecycle

- Within the option area, you can choose to initiate the actions related to the lifecycle from the starting up. To do this, check the following box:



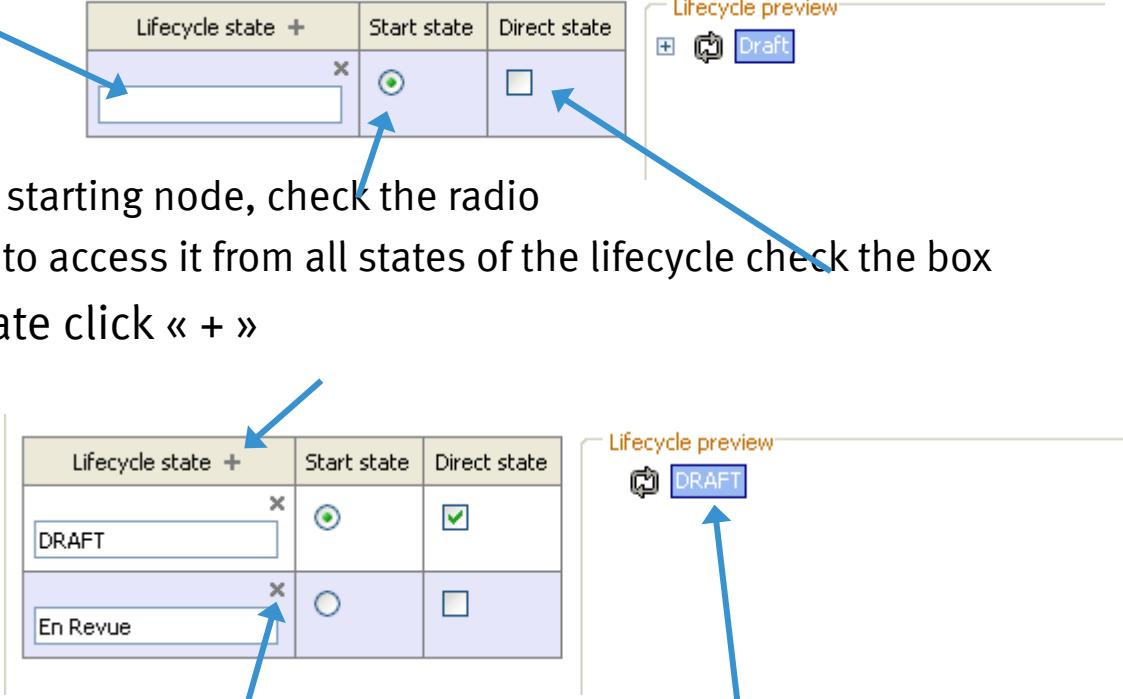
- A different property than « a_status » can be also used to manage document state
- Select from the drop-down menu the attribute to use:



- By default if this combo is empty, the property « a-status » will be used to store the value of this state.

To create states in a lifecycle

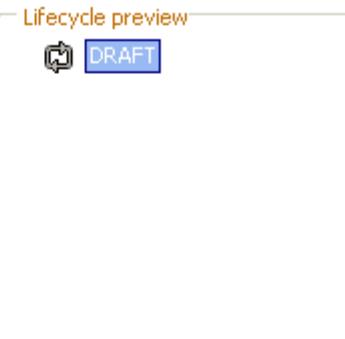
- Enter the different states of the lifecycle
 - State name
 - If the state is a starting node, check the radio
 - If it is possible to access it from all states of the lifecycle check the box
- To add a new state click « + »

- 
- To remove one click « x »
 - Once added and linked to the first one, the state appears in the left hand window

To create states in a lifecycle

- Click the state to be configured (background will appear in blue)

Lifecycle state +	Start state	Direct state
DRAFT	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
In Revue	<input type="radio"/>	<input type="checkbox"/>
Approved	<input type="radio"/>	<input type="checkbox"/>



- Choose an entry condition in the list

Entry condition +

- Condition on property
- Condition on property (selected)
- Condition VD children
- Condition permission
- Condition on group
- Condition on linked document
- Condition on rendition
- Condition check by Method

Parameters

r_version_label equals CURRENT

Message failed fr : Vous devez sélectionner la version courante.

Message failed en : You must select the current version.

Action Parameters

Set Property : a_status with value : Draft

Entry conditions in a lifecycle state

- Settings of the condition appear in the left hand side window
- You can add some with « + » or remove some with « x »
- For a condition on a property :
 - Select the property

Entry condition +		Parameters	
<input type="button" value="Condition on property"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Message failed fr :		
	Message failed en :		

- Then the operator and de desired property value

Entry condition +		Parameters	
<input type="button" value="Condition on property"/>	<input type="text"/> r_object_type	<input type="text"/> equals	<input type="text"/> Type_1
	Message failed fr :		
	Message failed en :		

- Enter the error message if condition id false

Entry conditions in a lifecycle state

- For a condition on a virtual document :
 - Select a state and the entry conditions of this state will have to be verified on all components of the VD

Entry condition +		Parameters
Condition VD childs	x	<p>Target state of VD children : <input type="button" value="▼"/></p> <p>Filter :</p> <p>Message failed fr :</p> <p>Message failed en :</p>

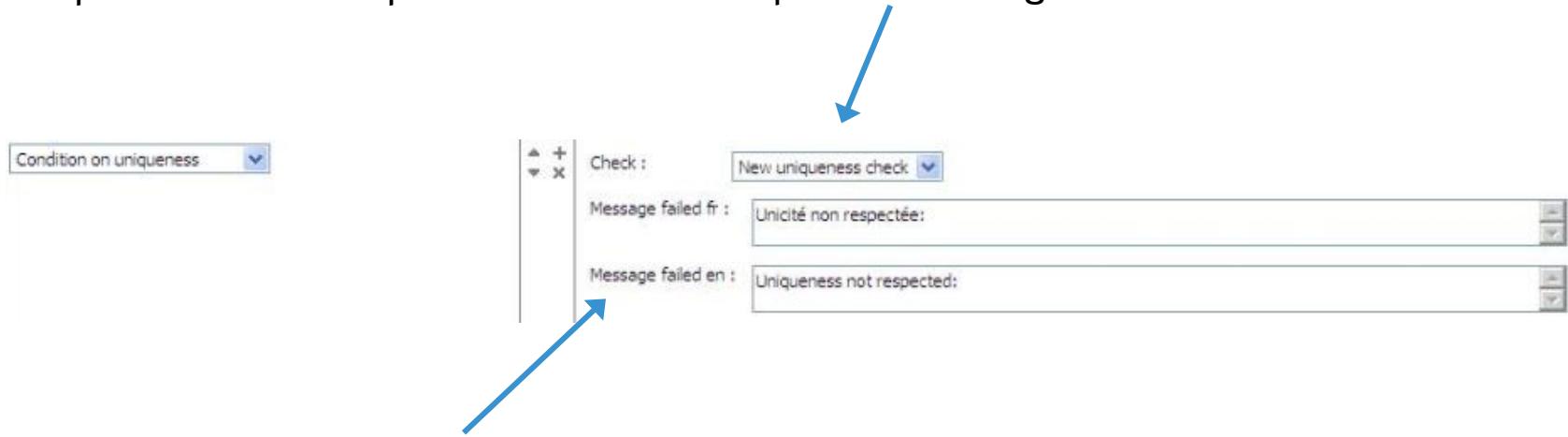
- You can also enter a filter (DQL request) that will make it possible to remove some components of the VD
- You can also enter an error message if the condition is false
- For a condition on a permission:
 - Select the minimum right to enter the state

Entry condition +		Parameters
Condition permission	x	<p>Minimal Permit : <input type="button" value="▼"/></p> <p>Message failed fr :</p> <p>Message failed en :</p>

- And the error message

Entry conditions in a lifecycle state

- It is possible to set up a selection on uniqueness configuration of a document.



- Add an error message if the condition is not checked.

Entry conditions in a lifecycle state

- For a condition of belonging to a group
 - Select the property containing the group and its dictionary and alias (if controlled)

Entry condition +	Parameters
Condition on group	<p>Property containing the group : <input type="text"/></p> <p>Dictionary : <input type="text"/></p> <p>Message failed fr : <input type="text"/></p> <p>Message failed en : <input type="text"/></p> <p>Alias : <input type="text"/></p>

- Then the error message
- For condition on a linked document
 - Select the relation and its way

Entry condition +	Parameters
Condition on linked document	<p>Relation name : <input type="text"/> D2_COPY_OF</p> <p>Relation direction : <input type="text"/> From parent to child</p> <p>Lifecycle : <input type="text"/> CDV Global</p> <p>Lifecycle state : <input type="text"/> Draft</p> <p>Message failed fr : <input type="text"/></p> <p>Message failed en : <input type="text"/></p>

- A lifecycle, the desired state and an error message if the condition is not verified

Entry conditions in a lifecycle state

- For condition on the existence of a rendition
 - Select the rendition format that must exist

Entry condition +		Parameters
Condition on rendition	x	<p>Rendition format : <input type="text" value="Acrobat PDF"/></p> <p>Message failed fr : <input type="text"/></p> <p>Message failed en : <input type="text"/></p>

- Then the error message
- For a condition on a method
 - Select the method to run and its parameters

Entry condition +		Parameters
Condition check by Method	x	<p>Method : <input type="text" value="C2RenditionMethod"/></p> <p>Extra arguments : <input type="text"/> ?</p> <p>Message failed fr : <input type="text"/></p> <p>Message failed en : <input type="text"/></p>

- Then the associated error message

To configure actions of lifecycle states

- Settings of action appear in the left hand side
- To fill a property:
 - Select the property, then the value to set (help for key words)

Action Type +	Action Parameters		
Set property	Set Attribute :	with value :	?

- To apply a state to VD children
 - To apply actions of a state to VD children, select this state (avoid some actions)

Action Type +	Action Parameters	
Action on VD children	State to apply to VD children :	Don not execute following actions :

- To create a new version
 - To change the document version, select the version type

Action Type +	Action Parameters	
Make new version	Version type :	Major Minor

To configure actions of lifecycle states

- To remove a version :
 - You can authorize to remove the annotated versions, check the box

Action Type +	Action Parameters
Destroy version	<p>Authorize destruction of annotated document : <input type="checkbox"/></p> <p>Filter :</p>

- You can apply a filer (DQL Request)
- To apply security, select this action in the list

Action Type +	Action Parameters
Apply security	

- To request a rendition, select this action in the list

Action Type +	Action Parameters
Rendition request	

- To work off-line (export the document), select this action in the list

Action Type +	Action Parameters
Work offline	

To configure actions of lifecycle states

- To take a snapshot, select this action and enter the title

Action Type +	Action Parameters
Snapshot	Snapshot title fr : Snapshot title en : Name of snapshot

- To apply auto naming

Action Type +	Action Parameters
Apply autonaming	

- To apply a method, select it in the list

Action Type +	Action Parameters
Apply method	Method : C2RenditionMethod Extra arguments :

- Then the settings of the method

- To send an email, select a « mailing list » configuration (done in the configuration matrix)

Action Type +	Action Parameters
Send mail	Mailing list : Mailing list 1

To configure actions of lifecycle states

- To apply autolink

Action Type +	Action Parameters
Apply autolink	

- To change linked document state, select the relation that linked them

Action Type	Action Parameters		
Change linked document state	Relation name :	reference	Relation direction :
	Lifecycle :	CV Qualité	from child to parent
			Lifecycle state :
			Applicable

- Then the lifecycle associated to the linked document and the target state (make it possible for example to set the linked document status to « Approved » when the status of the document is set to « Approved »)
- To change the state of previous versions, select new state and filter

Action Type	Action Parameters		
Change other versions state	State :	State 1	Filter : ? a_status='ACTIVE'

(This example make it possible to change the state of all previous versions that were Approved to Obsolete)

To configure actions of lifecycle states

- To fill a repeating
 - Select the property, the filling mode and the value to be set
 - You can choose to keep whether or not duplicate values when properties filling up
- To « Mark » a version label (Same for UnMark)
 - Enter the value to be set
- To send the document in a Workflow
 - Select the Workflow configuration and a name for it
 - You can add a note to the Workflow
- Use the following action to copy the values of an attribute to another one



To configure actions of lifecycle states

- D2 makes it possible to change the order of processes
- To move up an action, click the arrow

Action Type		Action Parameters		
Set property	▲ +	Set Property :	a_status	with value : Draft ?
Set property	▲ +	Set Property :	a_special_app	with value : ?
Set property	▲ +	Set Property :	approbateur	with value : ?
Set property	▲ +	Set Property :	date_approbation	with value : ?

- The action will be moved up of one step

Action Type		Action Parameters		
Set property	▲ +	Set Property :	a_special_app	with value : ?
Set property	▲ +	Set Property :	a_status	with value : Draft ?
Set property	▲ +	Set Property :	approbateur	with value : ?
Set property	▲ +	Set Property :	date_approbation	with value : ?

- To move down an action, click the other arrow
- Lifecycle actions are performed within administrator session like users and groups creation process

To create next states of a lifecycle state

- Click the state to configure (background will appear in blue)

Lifecycle preview

DRAFT

Lifecycle state +	Start state	Direct state
DRAFT	●	✓
In Revue	○	□
Approved	○	□

- Choose one of the next state in the list of defined states

Next state +

Approved

DRAFT

In Revue

Transition parameters

Type : * Promote

Action to perform :

Trigger event for transition :

Label fr : Label en :

Confirmation message fr :

Confirmation message en :

- You can add some with « + » or remove some with « X »

To create next states of a lifecycle state

- Once the next state selected, and the type (Promote, demote, suspend)

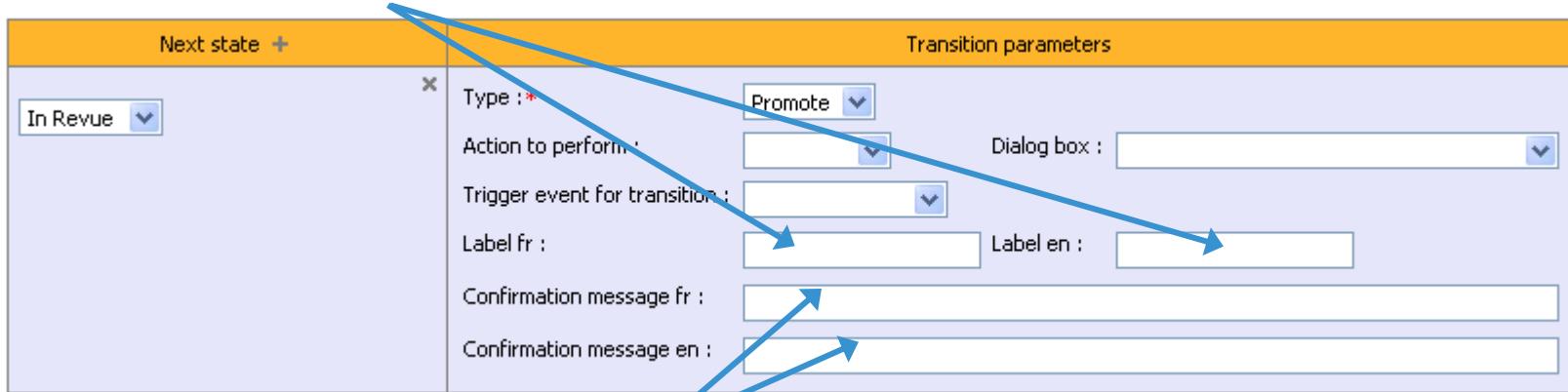
Next state +	Transition parameters
In Revue	Type : * Promote Action to perform : Trigger event for transition : Label fr : Confirmation message fr : Confirmation message en :

- Select the type of action to perform during the transition towards this state and the dialog box to display
 - Checkin() : check-in the document
 - ExportFile() : export the document
 - InsertPDF() : insert a PDF inside the rendition
- You can add a properties page which will be displayed at the time of action performing. It can allow for example the adding of new values to document properties
- Select the event that will triggered the transition (check in, cancel checkout)

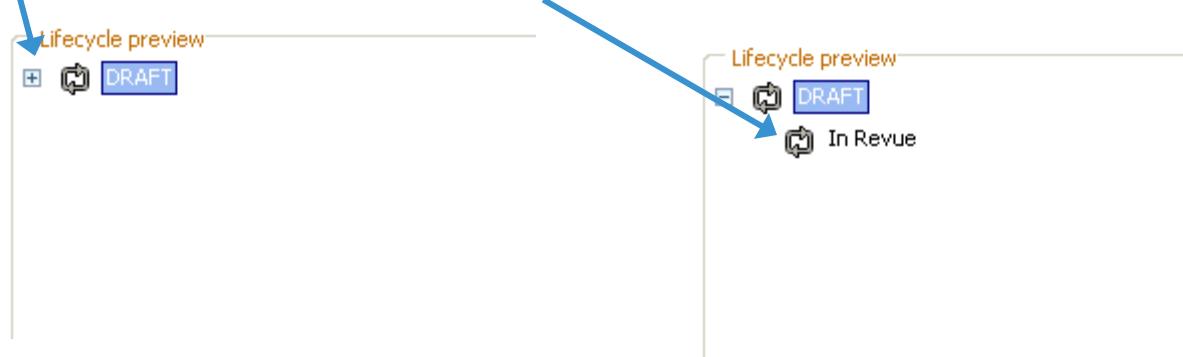
Next state +	Transition parameters
In Revue	Type : * Promote Action to perform : Trigger event for transition : Label fr : Confirmation message fr : Confirmation message en :

To create next states of a lifecycle state

- Enter the menu label that will trigger the transition



- Then the warning message
- You can add some with « + » or remove some with « X »
- The next states appear in the lifecycle visualization window
(click « + » the make them appear)



Transition conditions towards a lifecycle state

- Select the next state to which the conditions will be applied (blue)

Next state +	Transition parameters
In Revue	Type :* Promote Action to perform : Trigger event for transition : Label fr : Label en : Confirmation message fr : Confirmation message en :
Approved	Type :* Promote Action to perform : Trigger event for transition : Label fr : Label en :

- Then select the transition conditions (see configuration for entry conditions of a state)

Transition condition to the "In Revue" state +	Parameters
Condition on property	
Condition VD childs	
Condition permission	
Condition on group	
Condition on linked document	

Batch Lifecycle

EMC²

To Configure Batches for states changes

- D2 makes it possible to automatically change the state of several types of content by batch

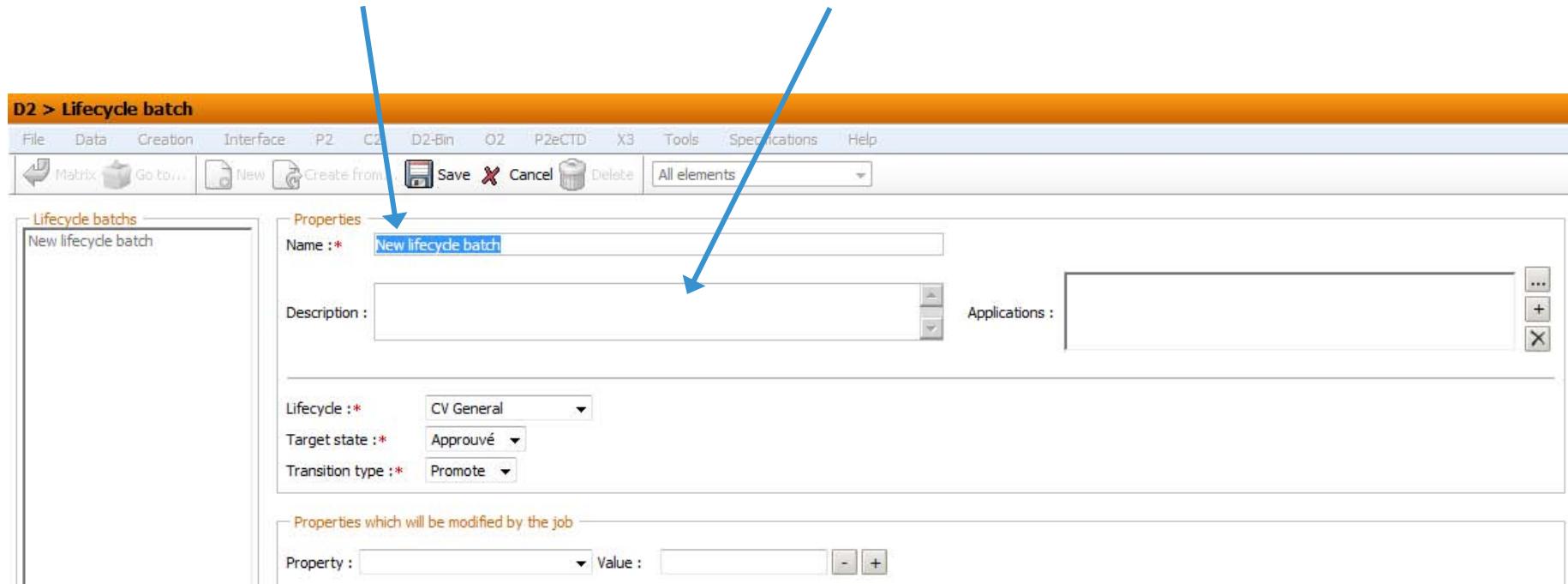


	IN Majeur	OUT Document_applicable	OUT Version_anterieure	CV General	BH Obsolète	New workflow	WK Signature	Armoire et répertoire	Directive	Instruction	Procédure	test subscription	Documents Draft	Documents En revue	versions_antérieures_1	Document Applicable	Document obsolète	Documents Approuvé	Document 2.6 R1	Mail	Change request	Groupe manager	Groupe qualité	Groupes managers et qualité	Répertoire applicable	Default
								<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							

- When the batch is triggered, it applies all changes of states to the selected context

To Configure Batches for states changes

- To configure a new batch to change states of content, click  in the main matrix
- Enter the name of the batch and its description



To Configure Batches for states changes

- The life cycle and the state desired and the type of transition

A screenshot of a configuration interface. It shows three dropdown menus: 'Lifecycle :*' with 'CDV Global' selected, 'Target state :*' with 'Périmé' selected, and 'Condition type :*' with 'Suspend' selected. Blue arrows point from the text descriptions in the list above to each of these three dropdowns.

- You can also define new values for properties
Select the property and the value that it should take after the state has changed

A screenshot of a configuration interface. It shows an 'Attribute' dropdown set to 'title' and a 'Value' input field containing 'State changed by batch'. To the right of the value field are two buttons: a minus sign '-' and a plus sign '+'. Blue arrows point from the text descriptions in the list above to the 'Attribute' dropdown and the 'Value' input field.

- To remove one, click « - »
- To add one, click « + »

Workflows

To configure a workflow

- D2 makes it possible to configure workflows that have been drawn in Documentum Workflow Manager (DWM)
- To configure a Workflow, you must first create it in DWM
- You have to do at least:
 - To draw the task
 - To draw the flow
 - To configure the tasks name
 - To configure aliases for recipients of workflow
 - To configure triggers and transitions
 - To configure delegation if necessary
 - **You do not have to configure the electronic signature**
- You have to save and install it after
- Once this step done, you can configure it in D2-Config workflow configuration screen

Pre-requisites

- Designed workflows with DWM must have:
 - A single package: you must have the same package from start to end
 - Users defined when workflow is underway if you use alias. Other aliases management are not supported
- BPM is supported by D2. Workflows, drawned in Process Builder with the same perimeter as Workflow Manager, can be integrated and performed in D2.

To configure a workflow

- Workflows configuration screen

D2 > Workflow

File Data Creation Interface P2 C2 D2-Bin O2 P2eCTD X3 Tools Specifications Help

Matrix Go to... New Create from... Save Cancel Delete All elements

Workflow List

- Test LC
- Test WF
- Test WF Seq Simple
- WK Boîte de dialogue
- Wk dialog box
- WK LC
- WK Signature
- WK Test nouveau module
- WK Validation

Properties

Name : * Test LC

Workflow label fr : Test LC

Workflow label en : Test LC

Description :

Workflow template : * Workflowtest Applications :

View

Workflow entry conditions

Entry condition ?	Parameters
<input style="width: 150px; height: 20px;" type="button" value="▼"/>	<input style="margin-right: 10px;" type="button" value="▲"/> <input style="margin-right: 10px;" type="button" value="+"/> <input style="margin-right: 10px;" type="button" value="▼"/> <input style="" type="button" value="X"/>

Abort Workflow options

Target state of documents on abort :

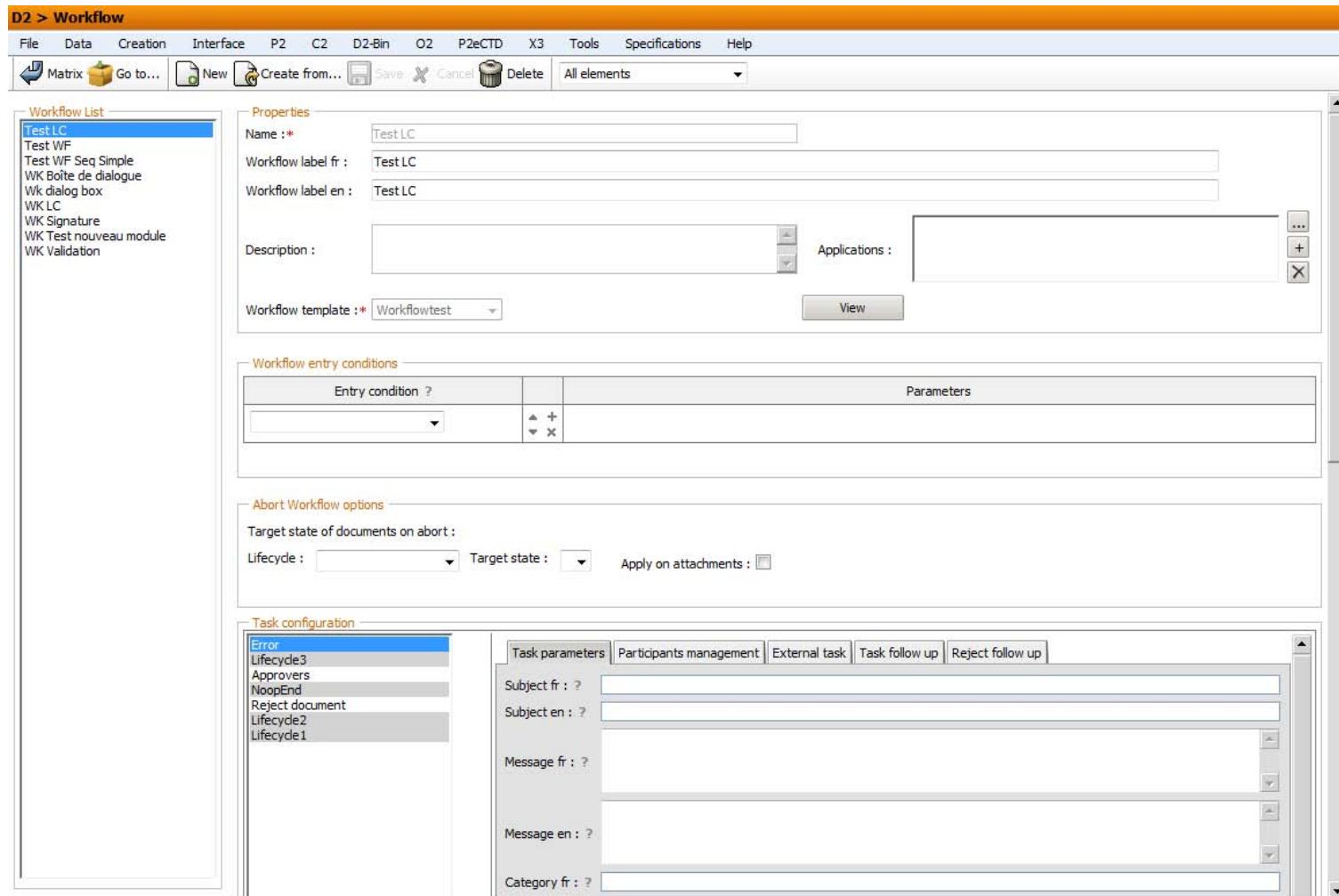
Lifecycle : Target state : Apply on attachments :

Task configuration

Error Lifecyde3 Approvers NoopEnd Reject document Lifecyde2 Lifecyde1

Task parameters Participants management External task Task follow up Reject follow up

Subject fr :
Subject en :
Message fr :
Message en :
Category fr :



To configure a workflow

- Click « new »
 - Enter the workflow name
 - Its label
 - Its description
 - Choose the workflow template
(Done in DWM)

Properties

Name :*	Workflow N1
Workflow label fr :	
Workflow label en :	Demo workflow
Description :	Workflow for demo
Workflow template :*	<input type="button" value="View"/> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> Workflow simple BC 2 workflow1 </div>
Workflow entry condit	<input type="button" value="Entry condition +"/>

- Enter the entry conditions in the workflow
 - Condition on a property, select the property, the operator and the value

Workflow entry conditions

Entry condition +	Parameters		
<input style="border: 1px solid #ccc; padding: 2px 5px; width: 150px; height: 20px;" type="button" value="Condition on property"/> x	<input style="width: 200px;" type="text" value="r_lock_owner"/>	<input style="width: 200px;" type="text" value="equals"/>	<input style="width: 200px;" type="text"/>
	Message failed fr :	<input style="width: 200px;" type="text"/>	
	Message failed en :	<input style="width: 200px;" type="text"/>	
	The document must not be locked to be sent in the workflow		

- Then enter the error messages if entry condition is false

To configure a workflow : Entry conditions

- Condition on the permissions of the document, select the minimal permission

Workflow entry conditions

Entry condition +	Parameters
Condition permission	Minimal Permit : 5-Version Message failed fr : Message failed en : You do not have the correct permission on this document

- Enter the error messages if the condition is false
- Condition on the belonging to a group, select the property containing the group name

Workflow entry conditions

Entry condition +	Parameters
Condition on group	Property containing the group : Groupe_du_doc Dictionary : Chef projet Message failed fr : Message failed en : You do not belong to the correct group

To configure a workflow : Entry conditions

- Condition on the existence of a rendition of the document, select the format of the rendition

Workflow entry conditons

Entry condition +	Parameters
Condition on rendition	Rendition format : Acrobat PDF Message failed fr : Message failed en :

- Then select the error message(s) if the condition if false
- Condition verified by a method, select the method and its arguments

Workflow entry conditons

Entry condition +	Parameters
Condition check by Method	Method : C2RenditionMethod Extra arguments : Message failed fr : Message failed en :

- Then select the error message(s) if the condition if false

To configure a workflow : Entry conditions

- For an input condition on document uniqueness, select the configuration name

Condition on uniqueness

Check : New uniqueness check

Message failed fr : Unicité non respectée ;

Message failed en : Uniqueness not respected ;

- To add a condition, click « + »

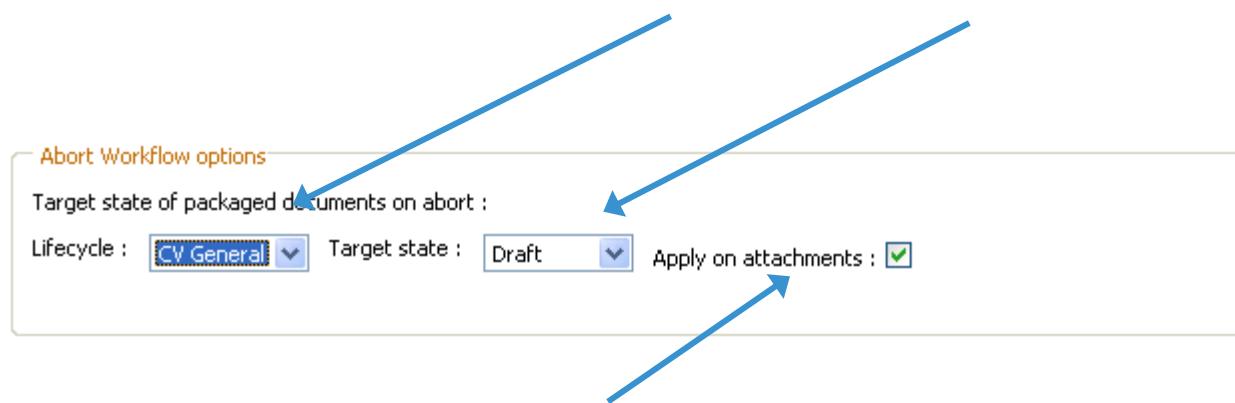
Workflow entry conditions

Entry condition +	Parameters
Condition on group	Property containing the group : Groupe_du_doc Dictionary : Chef projet Alias : Message failed fr : Message failed en : You do not belong to the correct group
Condition on property	r_object_type : equals Message failed fr : Message failed en :

- To remove a condition, click « x »

To configure a workflow : Abort Workflow options

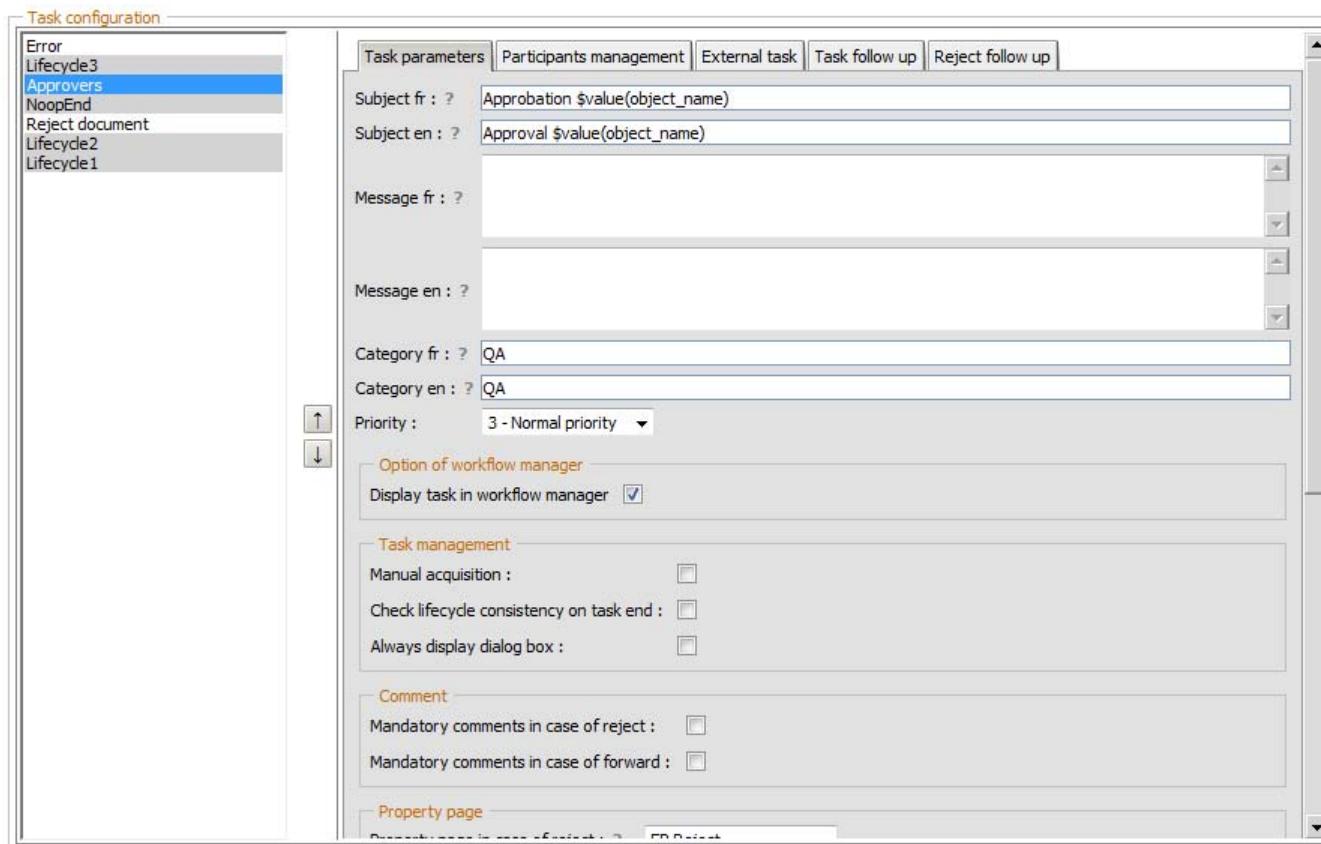
- D2 enables to configure the target state of content in case of workflow manual abort.
- The abort can be made when manual task or within the workflow management window (workflow manager).
- Select in the options, the lifecycle and target state to use in case of abort.



- By checking this box, you can also checkin this state to workflow associated content.

To configure a workflow : tasks

- Select the task to configure in the tasks list
 - Manual tasks (blank)
 - System tasks (Grey)



- Display of tasks order in the Workflow Manager can be changed using arrow keys.

To configure a workflow: Manual tasks

- Under “Task parameters” tab, fill in the manual task subject field (use \$value place holder for dynamic name)

The screenshot shows the 'Task parameters' tab of a workflow configuration interface. It includes fields for Subject (in French and English), Message (in French and English), and a note. A blue arrow points from the text '\$value(object_name)' in the 'Subject fr' field to the explanatory text at the bottom of the interface.

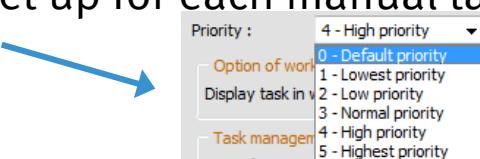
Subject fr : ?	Rédaction du document \$value(object_name)
Subject en : ?	Document \$value(object_name) authoring
Subject de : ?	
Message fr : ?	Merci de compléter le document.
Message en : ?	Thanks to author the document.

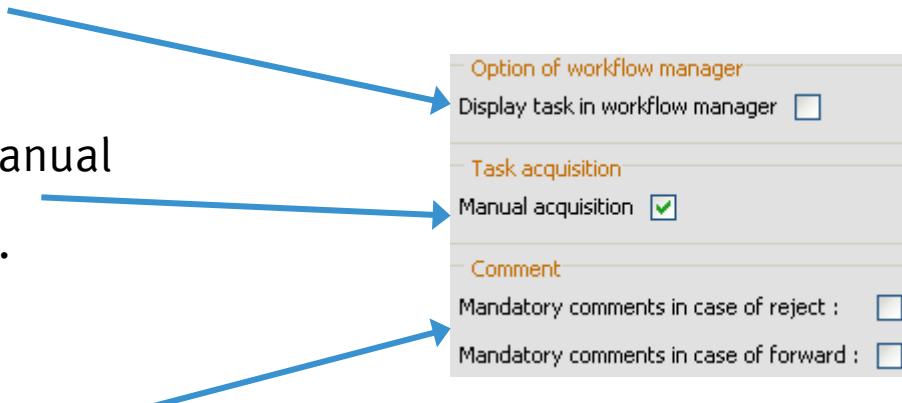
- Task autolink can be set up to classify user's inbox using this screen
- To do so, add a directory path for each application language
- Properties of document associated with this task can be used under this classification using the following joker:
\$value(object_name.nomdictionnaire.alias)

The screenshot shows the 'Category' section of the 'Task parameters' tab. It includes fields for Category (in French and English), Priority, and a note about Jokers. A blue arrow points from the explanatory text in the 'Priority' note to the joker placeholder '\$value(object_name.nomdictionnaire.alias)'.

Category fr : ?	Ecriture/\$value(sous_type.Sous-type1.fr)/\$value(owner_name)
Category en : ?	Writing/\$value(sous_type.Sous-type1.en)/\$value(owner_name)
Category de : ?	
Priority :	Jokers: \$value(<property>): Task document(s) property Example: \$value(object_name) \$alias(alias.asset.alias)
Option of workflow manager	
Display task in workflow manager <input type="checkbox"/>	

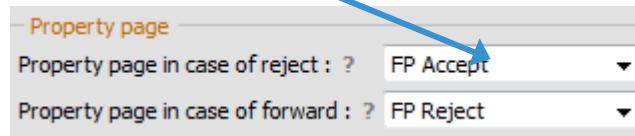
To configure a workflow: Manual tasks

- A priority level (0 to 5) can be set up for each manual task using the following list:
- These levels of processing are set up by default once the workflow has started. They are displayed into the user's inbox with their associated colors (c.f Theme configuration module)
- Workflow performers can modify later those levels from their own inbox.
- It is possible to display or hide every manual task in D2-Client workflow manager using this box

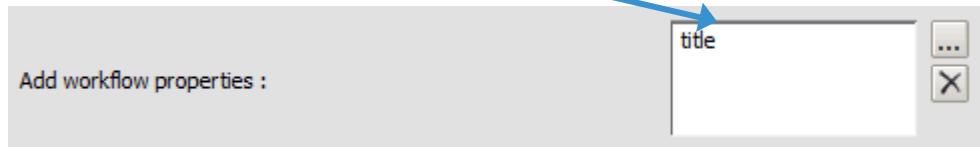
- Select this box to enable manual acquisition of the task in a multirecipient task process.
- Check the box if in case of reject or forward, you require a mandatory comment.

To configure a workflow: Manual tasks

- Properties pages can be added for each manual steps of the workflow, in order to provide additional information to the document being validated.
- These windows display when manual tasks validation or rejection. To do this, select properties pages to use in the combos below:



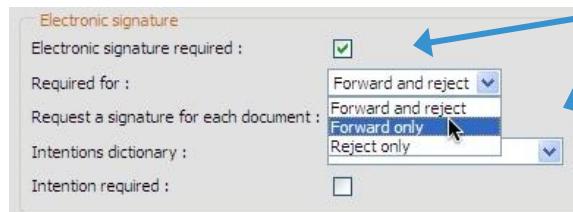
- Information included in this properties page will be maintained throughout the validation in the intermediate boxes, as well as in workflow tracker.
- It is also possible to transfer these values into main properties pages of document by combining it with life-cycle.
- To do this, add for each system task of life-cycle, additional properties to be transferred.



- If you require those properties to be transferred in case of task « Rejection », it is necessary to add « Apply settings » in the life-cycle module.

To configure a workflow : manual tasks

- Check the box if you require an electronic signature to end the task

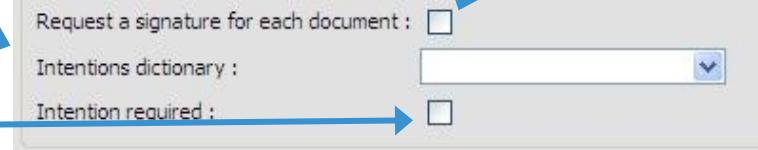


Select the case that required the signature

- Check the box if you require a signature for each appendix document

- Select the dictionary of intentions

- Check the box if you require to set up the intention to be mandatory



- D2 enables manual tasks audit. To add additional audit information on the signature, you can complete this field using:

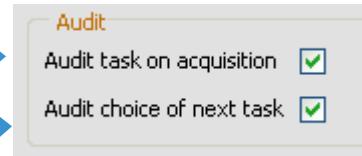
- Fixed value
- « \$value »
- « \$dqlvalue »



- You can also audit:

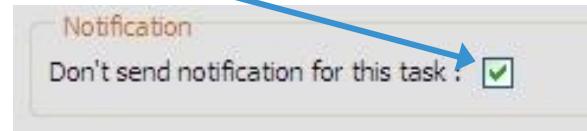
- The task opening

- The choice of next task



To configure a workflow : manual tasks

- If you do not want notification for this task, check the box



- Then, click « Performers management»

- Alias of task performer

- Check if you want to be able to add a task when the workflow is ongoing

- Select in the list the performers who could be changed during this task. Click one and then on «»»

- If you have authorized delegation, select the type of user list to propose (here DQL)

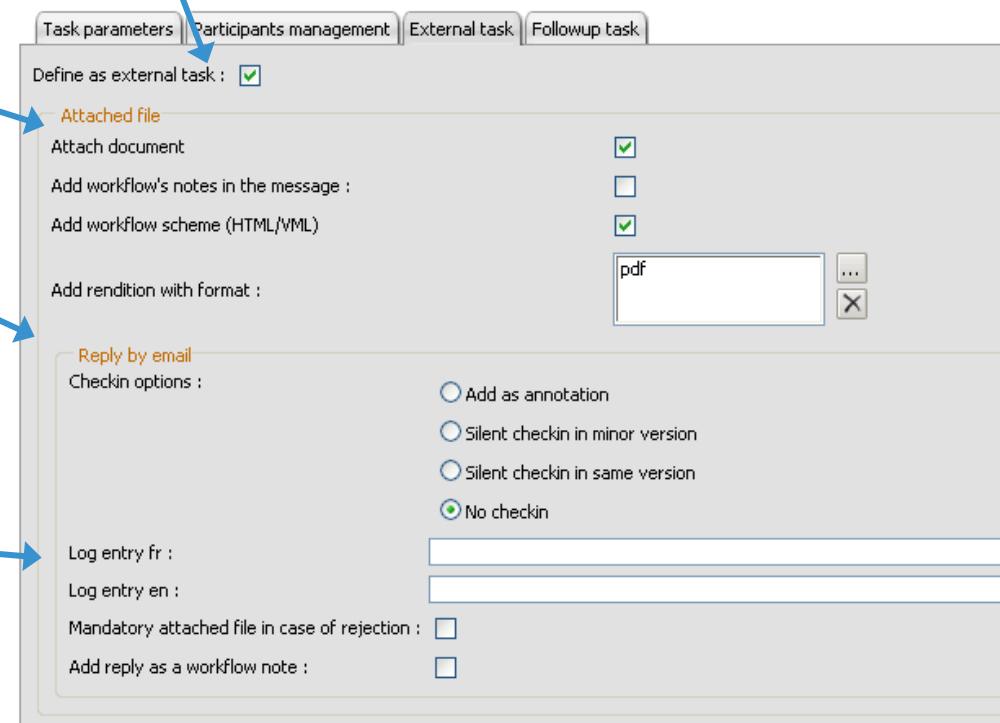
- Enter the DQL

- To use properties values: \$value([attribut])

The screenshot shows the 'Participants management' tab of a workflow configuration dialog. It includes fields for 'Task participant' (set to 'Groupe_revue'), a checkbox for 'Can add or remove a task when the activity is running' (unchecked), and sections for 'Participants available' and 'Participants modifiable'. The 'Participants available' section lists 'Groupe de validation diffusion', 'Groupe_validation', 'Liste_de_diffusion', 'Redacteur', and 'Revue_externe'. The 'Participants modifiable' section contains 'Groupe_revue'. There is also a 'Required' checkbox (unchecked). Below these, there is a section for 'List of users allowed for delegation' with a dropdown 'Type:' set to 'DQL' and a 'Query:' input field.

To configure a workflow : manual tasks

- If you select a dictionary click « Dictionary » then choose the dictionary within the following list
- If the task is an external task (email will be used), click « external task », then check the box
- Attached files :
 - Document
 - Workflow notes
 - Workflow schema
 - Renditions
- (click « ... » to select)
- Select the check-in mode of the response document*
- The document can be checked-in as annotations. It could be used when office folder comparison.
- Enter the « Log Entry »
- Make mandatory the attached file in case of rejection
- Add the mail content as workflow note



To configure a workflow : Manual task follow up

- It is possible to set up a limited time period for the workflow's manual task execution. Access the tab "Follow-up task"
- Adding a limited time period allows to compute notification events that will be sent to performers before and after the end of the task.
- Input the number of days before the end of the task
- The notification event will be sent before the end of the task.
- When you input a negative integer, the message will be sent once the scheduled task is over.
- For example, the value "2" input allows to send a notification two days before the end of the due date of the task. "-1" notify the performer one day after the task has expired.
- Specify who will receive the message:
 - Supervisor
 - Task owner
 - Other: You can use in this field :
\$value \$alias \$dqlvalue \$alias
- When sending the notification, an action can be launched:
 - Validation, Cancelation, Delegation, task execution, Workflow abort

Task duration in days : 0

Parameters

Remaining days before the end of task : [input field]

Notification recipients

Supervisor:

Task owner:

Other:

Action: [dropdown menu]

Task follow up | Reject follow up

Messages

Subject fr : ? [input field]

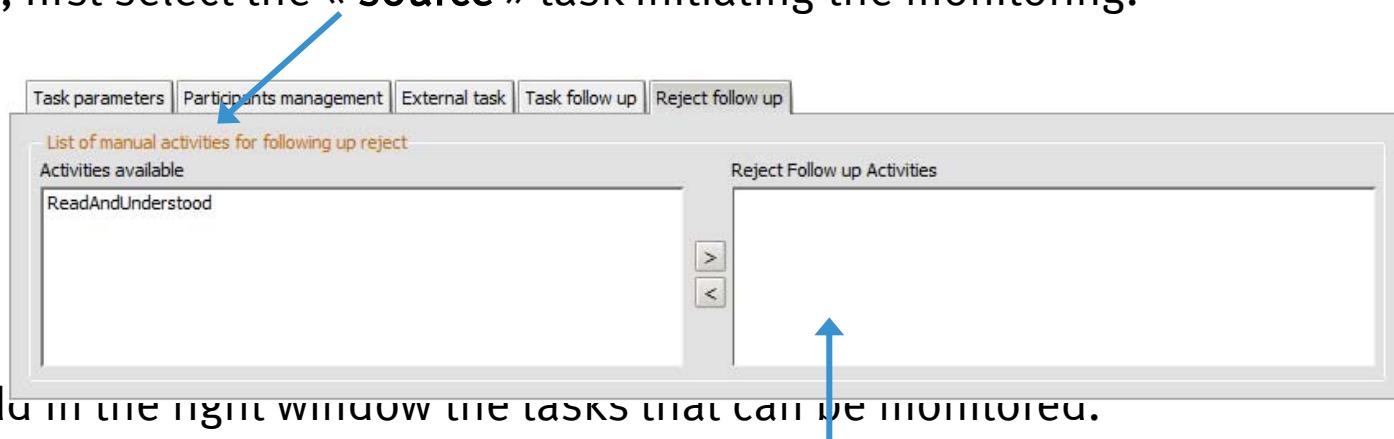
Subject en : ? [input field]

Message fr : ? [input field]

Message en : ? [input field]

To configure a workflow : Manual task reject

- From this tab, you can establish a monitoring setup to follow the rejected tasks of a workflow.
- From now on, this setting will allow the user to view, from any of these manual steps, whether incoming tasks were already sent (and rejected) or not to this workflow
- To do so, first select the « source » task initiating the monitoring.



- Then, add in the right window the tasks that can be monitored.
- The follow-up of all manual tasks can be performed during the different validation steps of the workflow.
- Once this setting is implemented, the user will be able to view, under the Inbox window and with the "source" activities, if one or several incoming tasks have been rejected.

To configure a workflow : system tasks

- For an system task, enter the labels

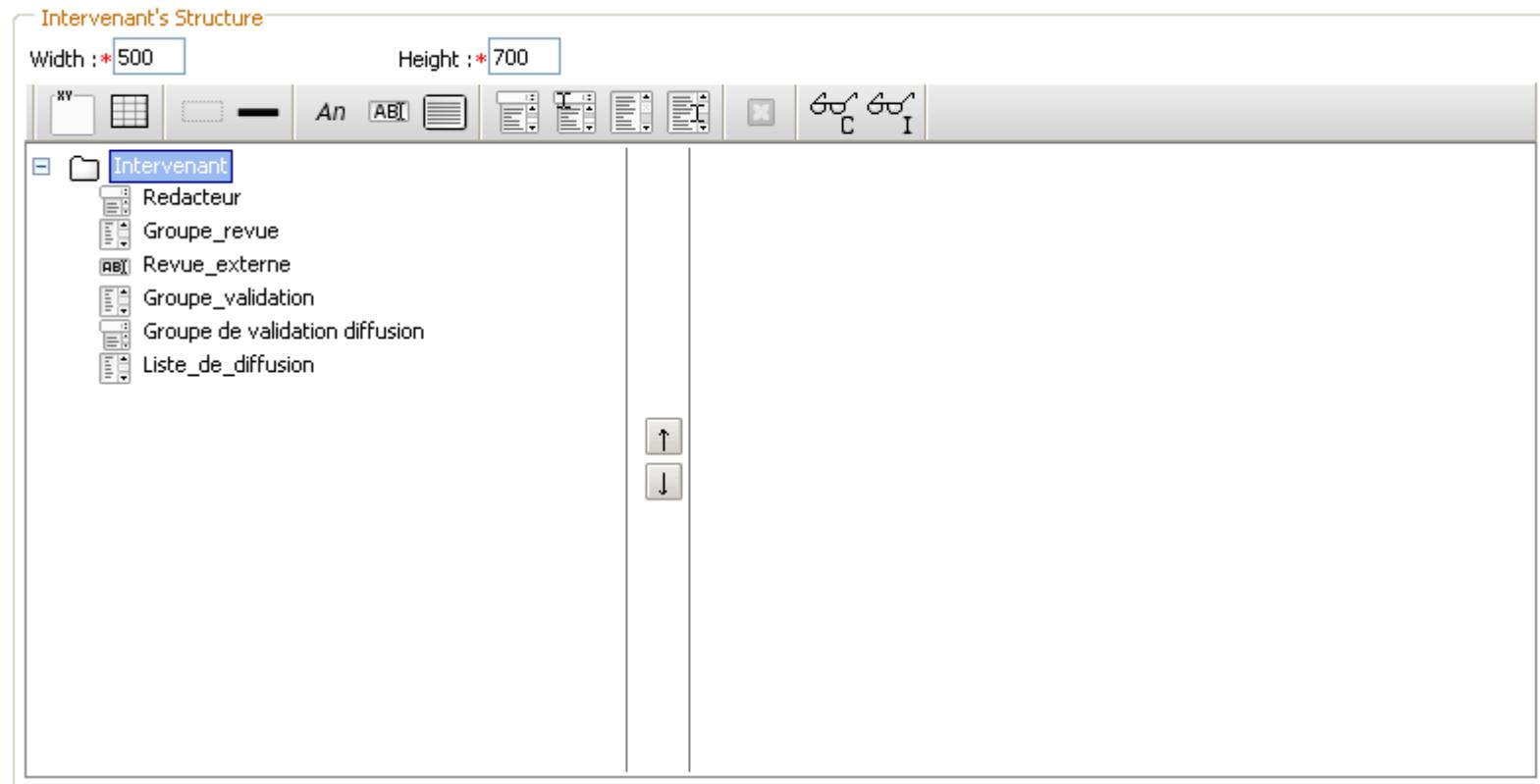
Task parameters

Label fr :	<input type="text"/>
Label en :	<input type="text"/>
Transition type :*	<input type="button" value="Demote"/>
Lifecycle :	<input type="button" value="CDV G2D2"/>
Target state :	<input type="button" value="Draft"/>

- Transition type :
 - Promote
 - Demote
 - Suspend
 - Resume
- Associated lifecycle
- Target state (of lifecycle) for the task

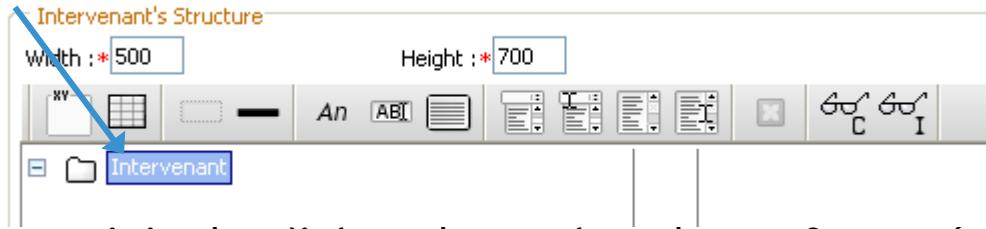
To configure a workflow : Performers list

- To create a template with the performers list to be filled at the starting of the workflow or during task execution, you have to create a properties dialog with the following screen:

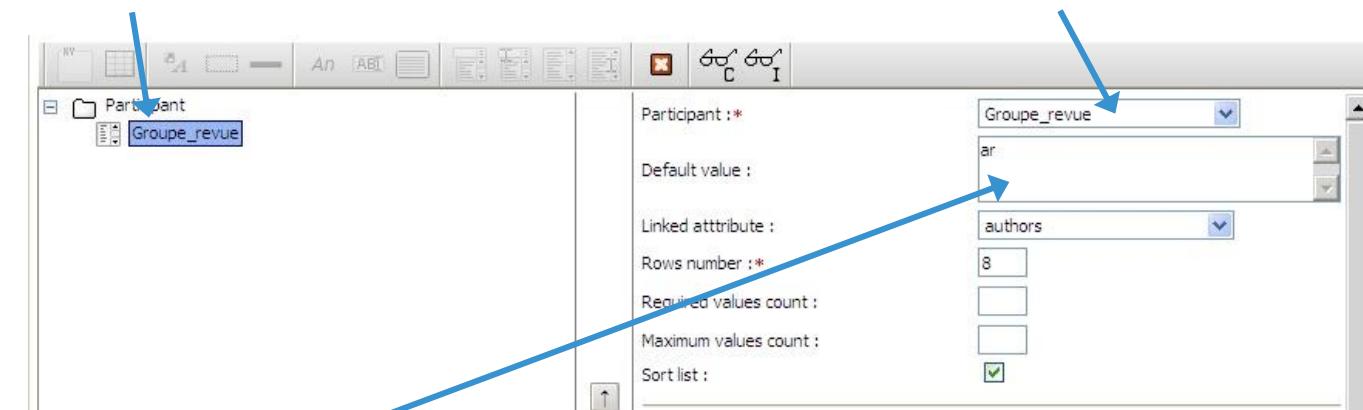


To configure a workflow : Performers list

- The process is the same one than for a properties dialog, click « Performers's structure » then on one of the following object:



- To insert it in the dialog, then select the performer (alias)



- You can add a default value or use key words:
 - \$value([attribut]) : value of a property
 - \$USER : current user
 - \$dqlvalue("[DQL]") : DQL request
 - It is also possible to combine between them or with static others values

To configure a workflow : Performers list

- “List” or “Editable list” input type elements allow you to enable the recipient list import or export when starting a workflow from D2-Client.

Participant :*

Default value :

Linked attribute :

Rows number :* 8

Required values count :

Maximum values count :

Sort list :

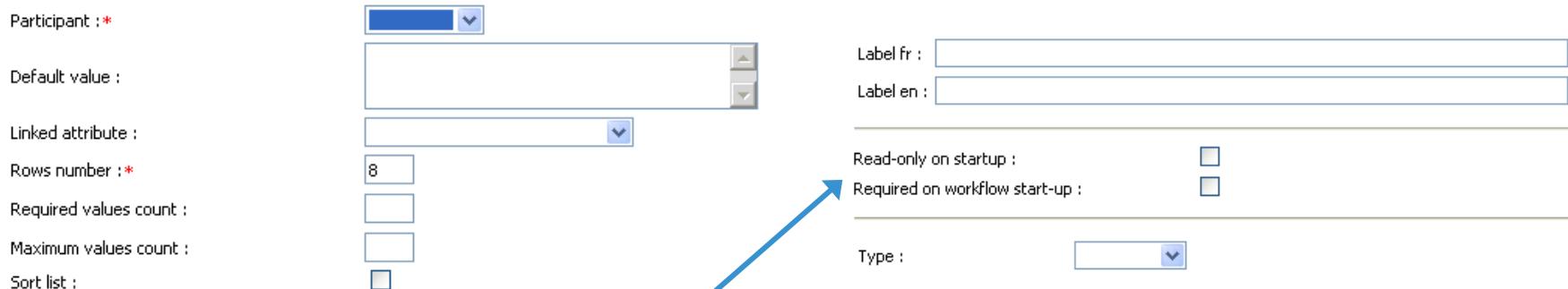
Label fr : _____

Label en : _____

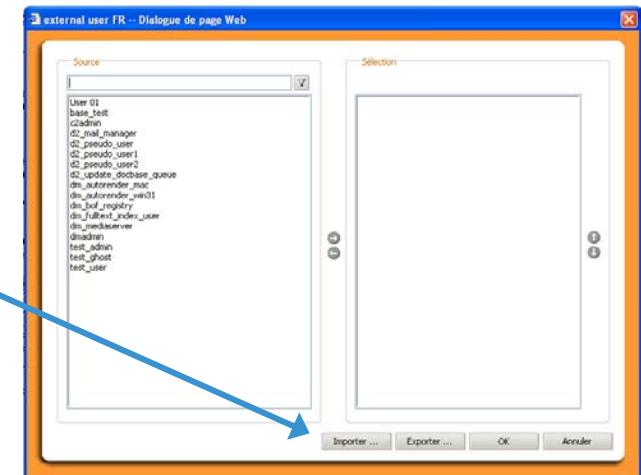
Read-only on startup :

Required on workflow start-up :

Type : _____



- To do so, check the corresponding box to enable this functionality.
- The activation will display from the “recipient list” display, the two buttons for importing and exporting the complete list of performer.



To configure a workflow : Performers list

- You can define a property which will be updated if the performer is modified during the workflow

The screenshot shows a configuration panel for a 'Performers list' property. On the left, there are several configuration options:

- Participant :*
- Default value :
- Linked attribute :
- Rows number :*
- Required values count :
- Maximum values count :
- Sort list :

On the right, there is a dropdown menu labeled 'Groupe_revue' containing the value 'ar'. Below it is another dropdown menu labeled 'authors' with the value '8' selected. At the bottom of the list, there is a checked checkbox.

- If performer is a group of people, you can define the number of line for users entering
- You can set the number of mandatory performers or the maximum authorized
- Check the box if you want to sort the list of performers

The screenshot shows a configuration panel with two label fields:

- Label fr : Groupe de revue
- Label en : Group of review

- Enter the label for the object

To configure a workflow : Performers list

- If you want to disable this value at the starting of the workflow, check this box

Read-only on startup :

Required on workflow start-up :

- If you want to make this performer mandatory at the starting of the workflow, check the box
- Select the type of available performers list for delegation (DQL, Dictionary, Taxonomy)

Type : DQL

Query :

```
select user_name from dm_user where r_is_group = False order by 1
```

- If you select DQL, enter the request. Key word : \$value([attribut])
- If you select dictionary,
Select the desired dictionary
The alias
or language

Type : Dictionary

Dictionary : Chef projet

Alias :

Language : en

To configure a workflow : Performers list

- If you select Taxonomy,

Select the desired taxonomy
The level of the taxonomy
The alias or language

Type :	Taxonomy
Taxonomy :	Discipline / Sous-discipline préclinique
Level :	Sous-discipline préclinique
Locale :	
Alias :	
Previous Property :	Groupe_revue
Next Property :	

The performer (alias) to deduct
or to Filter

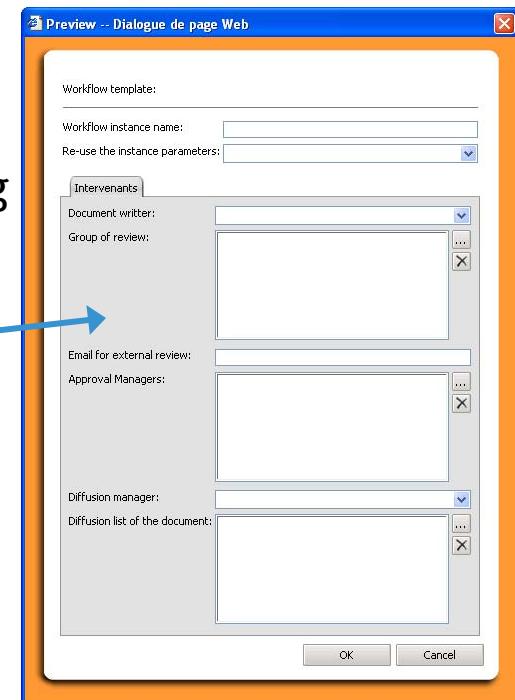
- You can preview at any time the result of the dialog

Intervenant's Structure

Width : * 500 Height : * 700

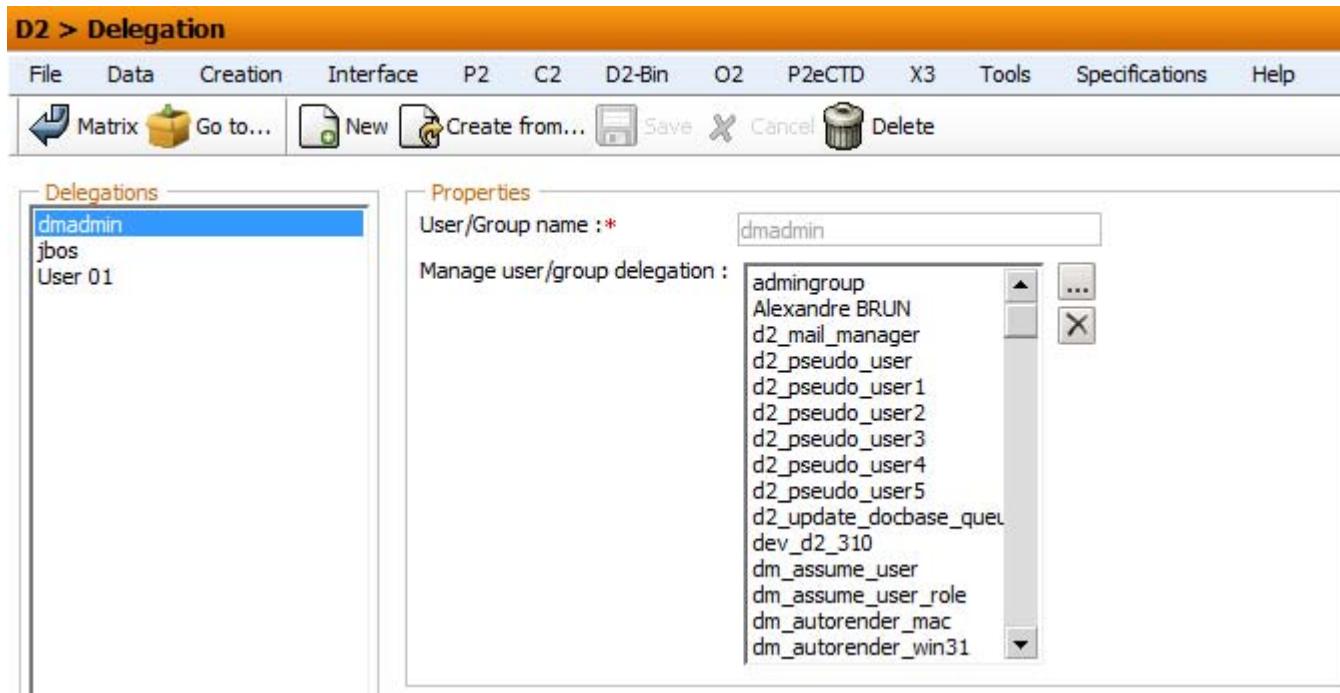
Intervenant

- Redacteur
- Groupe_revue
- Revue_externe
- Groupe_validation
- Groupe de validation diffusion
- Liste_de_diffusion



Workflow : To plan a delegation

- You can define authorisations for the delegation of one performer
- The configuration screen is the following

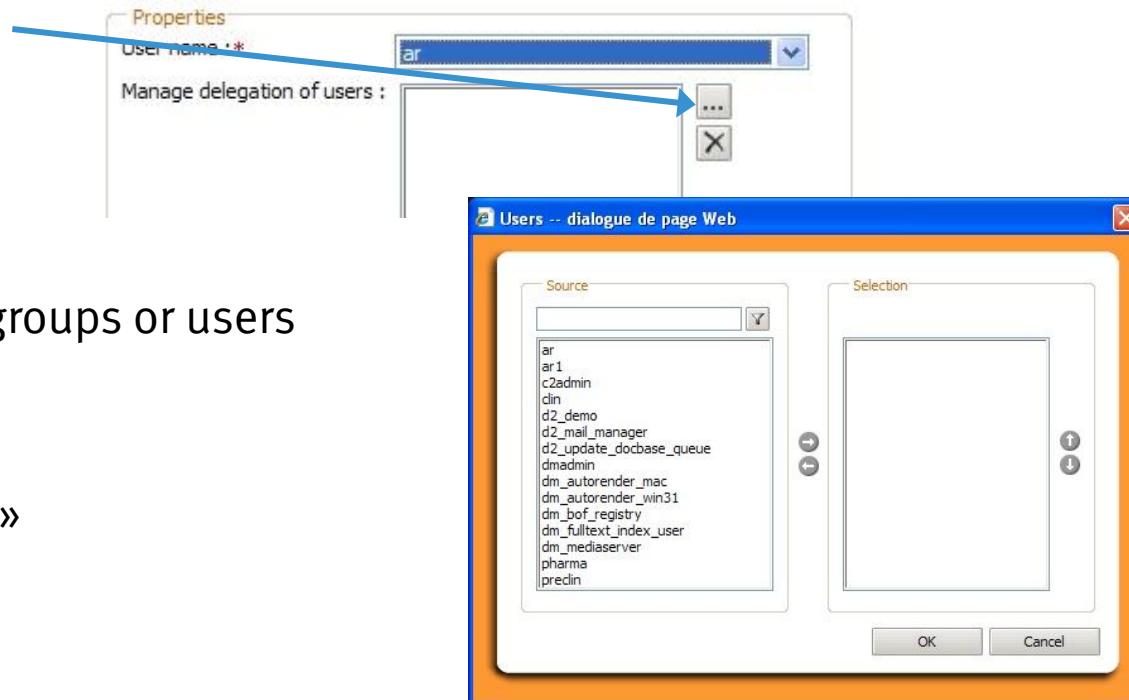


Workflow : To plan a delegation

- Click the icon « new », then select a user in the list



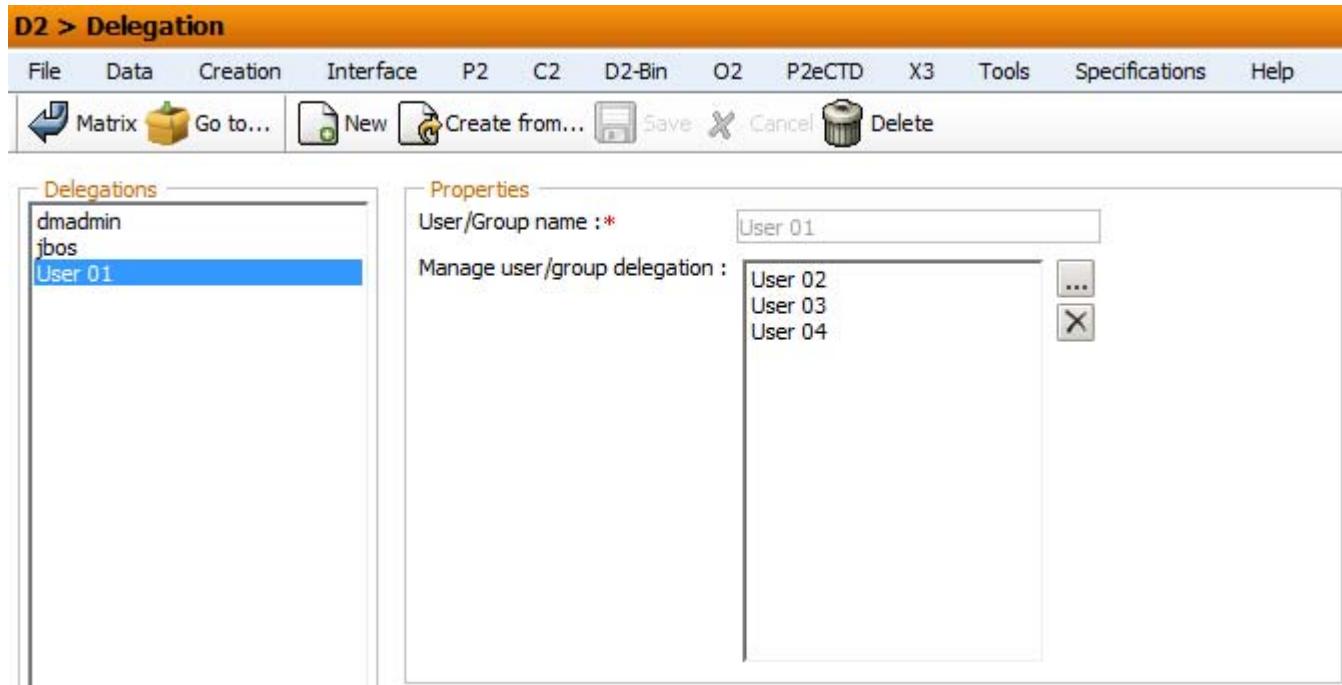
- Click « ... »



- You can select groups or users
- To add a user click « > »
- Then click « OK »

Workflow : To plan a delegation

- In this example, the user « User 01 » will be able to plan a tasks delegation for himself and for the users « User 02 » « User 03 » and « User 04 » .

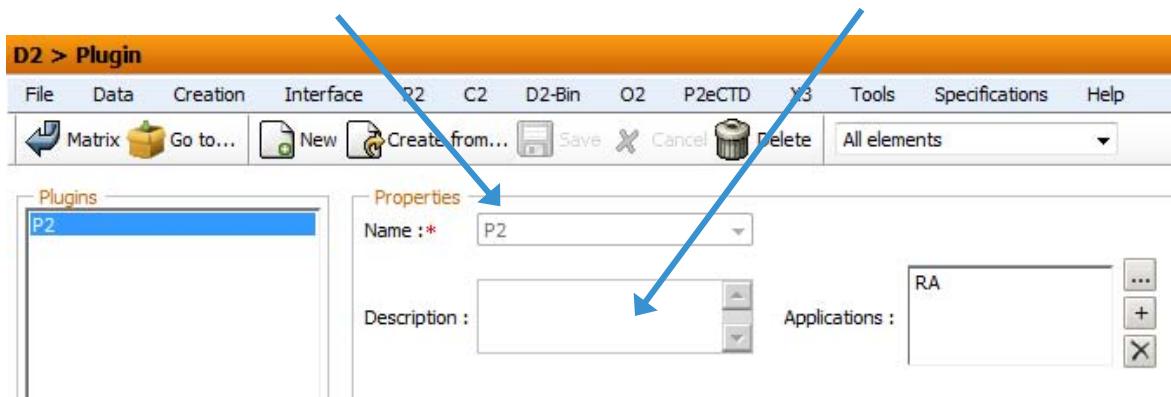


Plug-in

EMC²

Plug-in

- The use of a plug-in can be limited to a context
- To do that, create a new plug-in configuration
- Select the plug-in in the list then a description

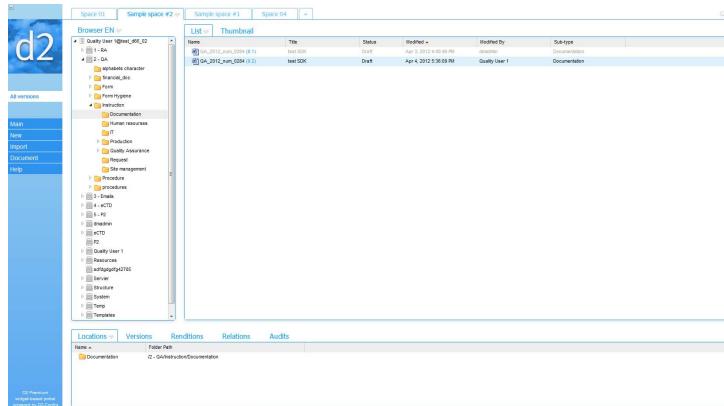


- Save it and check the content sets for which it must be used in the general configuration matrix
- A plug-in that does not appear in the list will always be executed
- A plug-in that appears in the list but that has no content set checked will never be executed

	O2 controlled documents	C2 approved ctrl docs	C2 controlled documents	AR (no code)	AR	Sigés	Empruntés	Validé	Archivé
Global									
batch peremption									
WF Validation								✓	
ADI Complet								✓	
RDT Approuvés signés									✓
RDT Standard									
EML Info Approbation									
Checkin									
Draft									
C2									✓

User Interface Configuration

D2 4.0



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D2 4.0: A new generation User 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.

Themes

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Themes: 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.

The screenshot shows the D2 Theme configuration interface. On the left, a sidebar lists themes: Blue (selected), EMC, Gray, and Pink. The main area displays the properties for the 'Blue' theme, including:

- Properties:**
 - Name : * Blue
 - Description :
 - Applications :
- Label fr : * Bleu**
- Label en : * Blue**
- Label pt : * blue**
- Label ja : * blue**
- Header color:** Background color : (blue swatch)
- Tab colors:**
 - Title color : (dark blue swatch)
 - Border color : (light blue swatch)
- Widget colors:**
 - Active tab background color : (blue swatch)
 - Inactive tab background color : (gray swatch)
 - Apply to text :
 - Border color : (light gray swatch)
 - Selected element color : (blue swatch)
 - Deselected element color : (black swatch)
- Background colors:**
 - Plain color : Choose your color : (color picker)
 - Gradient color : Starting color : (color picker), Ending color : (color picker)
 - Textured background : Choose your texture : (texture picker)

Preview: A right-hand panel shows a preview of the D2 user interface with the 'Blue' theme applied. The interface includes a blue header with the 'D2' logo, a blue sidebar with 'MENU 1', 'MENU 2', and 'MENU 3', and a main workspace with four widgets labeled 'Widget 1', 'Widget 2', 'Widget 3', and 'Widget 4'. The selected item in the sidebar ('Item 3') is highlighted in blue.

Themes: 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

Properties

Name : * Blue

Description :

Applications : X3

Label fr : * Bleu

Label en : * Blue

- 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

Header color

Background color :

Tab colors

Title color :

Border color :

Widget colors

Active tab background color :

Inactive tab background color :

Apply to text :

Border color :

Selected element color :

Deselected element color :

Background colors

Plain color :

Choose your color :

Gradient color :

Starting color :

Ending color :

Textured background :

Choose your texture :

Themes: 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



– Header color –

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



– Tab colors –

Title color :



- And then the one of the border

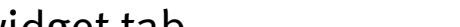


Border color :



- With **Widget colors** fieldset choose the color of:

- The background of current widget tab



– Widget colors –

Active tab background color :



- And also the one of inactive tab (not selected)



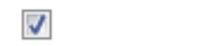
Inactive tab background color :



- When you check this box background color is applied on widget title



Apply to text :



- You can also define a color of widget border



Border color :

- The theme of the selection is also customizable for:

- Selected element



Selected element color :



- Deselected element



Deselected element color :

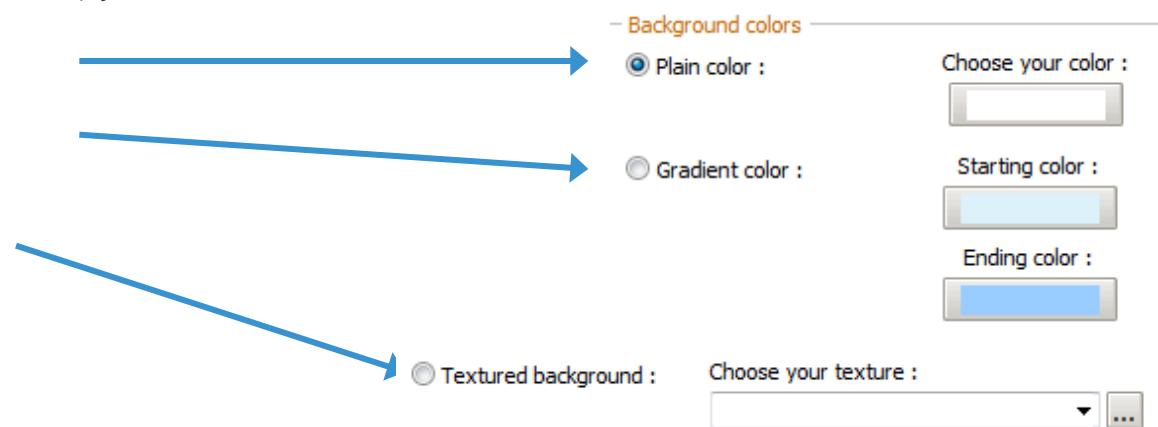


Themes: Create a theme configuration

- The Background color fieldset 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.

Themes: 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.

Workspace

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To configure workspace structure

- This module allows you to import and configure browsing workspace of the user interface.

The screenshot shows the X3 workspace configuration interface. The top navigation bar includes links for Fichier, Données, Création, Interface, P2, O2, D2-RPS, C2, D2-Bin, P2eCTD, X3, Outils, Spécifications, and a help icon. Below the navigation is a toolbar with icons for Matrice, Aller vers..., Nouveau, Crée à partir de..., Enregistrer, Annuler, Supprimer, and a dropdown menu for 'Tous les éléments'. On the left, a sidebar titled 'Espaces' lists various workspace types: Blue preview space, Classic space, Dark developer space, Developer space, Full Space, Preview space, Simple space, Vertical space, Web space (which is selected and highlighted in blue), and Workflow Space. The main panel displays the properties for the 'Web space'. The 'Propriétés' tab is active, showing fields for Nom (Name) set to 'Web space', Description (Description) as an empty text area, Applications (Applications) with 'X3' listed, and several language labels and descriptions. Below these are fields for 'Fichier de structure d'espace' (Space structure file) and 'Fichier d'aperçu' (Preview file), both currently set to 'Web space'. A preview image of the workspace structure is shown, featuring the X3 logo and various application icons. At the bottom, there is a 'Apparence par défaut' (Default appearance) dropdown set to 'Orange and white'.

Workspace: Design a 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).

Workspace: Design a structure

- Here are some workspaces samples and their reference schema (XML and XSD files):
 - SpaceSchema.xsd
 - SpaceSample01.xml
 - SpaceSample02.xml
 - SpaceSample03.xml
 - SpaceSample04.xml

Workspace: General design of a structure

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

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

Workspace: 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 these 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.

Workspace: Components 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.

Preview: Components Locations

West

No preview available

North

Center

East

South

Locations Versions Renditions Relations Audits

Nom Chemin de dossier

d2 Premium
web-based portal
powered by D2-Config

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 (N for North, see previous slide) *
 - 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.

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 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>
</root>
```

Space 01: Border layout container

The screenshot displays a D2 Premium widget-based portal interface. A dashed blue border highlights the main content area, which is organized into four quadrants:

- North (Top Left):** A sidebar titled "Espace 01" containing navigation links: All versions, Main, New, import, Document, and Help.
- South (Bottom Left):** A footer bar with links: Versions, Renditions, Relations, and Audits.
- East (Right Side):** A "Locations" panel showing a single folder entry: "Form Hygiene" under the path "/2 - QA/Form Hygiene".
- West (Left Side):** A "Browser EN" panel listing various user accounts and system categories. The "Form Hygiene" category is currently selected.
- Center (Main Content Area):** A "Thumbnail" view table showing three items: Documentation, IT, and Quality control. The table includes columns for Name, Title, Status, Modified, and Modified By.

Name	Title	Status	Modified	Modified By
Documentation			Feb 24, 2012 10:33:20 AM	dmadmin
IT			Apr 4, 2012 7:45:52 PM	dmadmin
Quality control			Feb 24, 2012 10:39:23 AM	dmadmin

Workspace: Tab container

- This layout is under the form of a horizontal layout with tab items organized horizontally.
- “Content” node
 - One and only one “Content” node for the tab 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 constraint directly by its parent container.

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

Space 02: Tab container

- An example of a workspace structure with tabs (Sample02)

```
<?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>
</root>
```

Space 02: Tab container

- Preview of a workspace structure with tabs (Sample02)

The screenshot shows a D2 Premium workspace interface with a sidebar and several tabs at the top.

Top Tabs: Space 01, Sample space #2, Sample space #1, Space 04, +, Search icon.

Left Sidebar: d2 logo, All versions, Main, New, Import, Document, Help.

Content Area: A large tabbed container with a dashed blue border. The active tab is "List". Inside the tab, there is a table showing two items:

Name	Title	Status	Modified	Modified By	Sub-type
QA_2012_num_0284 (0.1)	test SDK	Draft	Apr 3, 2012 4:40:46 PM	dadmin	Documentation
QA_2012_num_0284 (0.2)	test SDK	Draft	Apr 4, 2012 5:36:09 PM	Quality User 1	Documentation

Bottom Tabs: Locations, Versions, Renditions, Relations, Audits.

Bottom Footer: D2 Premium widget-based portal powered by D2-Config.

Text Overlay: Tabs

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>
```

Space 03: Accordion container

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

```
<?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>
```

Space 03: Accordion container

- Preview of an accordion container (Sample03)

The screenshot shows a D2 Premium portal interface with the following components:

- Header:** Space 01, Sample space #2, Sample space #1, Space 04, +, Search icon.
- Left Sidebar:** d2 logo, All versions, Main (selected), New, Import, Document, Help.
- Content Area:**
 - Browser EN:** A tree view of content items under "4 - eCTD".
 - List View:** A table showing a list of items with columns: Name, Title, Status, Modified, Modified By.
 - Thumbnail View:** A grid of thumbnail images corresponding to the list items.
 - Locations:** A table showing a single item: Name (4 - eCTD) and Folder Path (/4 - eCTD).
- Bottom Navigation:** Page navigation (1 of 2), search icon, displaying 1-20 of 38.

A dashed blue box highlights the "Locations" section and the right sidebar.

Accordion: The word "Accordion" is displayed in the right sidebar area.

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 <>

Space 04: Horizontal container XML

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

```
<?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>
```

Space 04: Horizontal container Preview

- Multiple previews of horizontal containers (Sample04)

The screenshot shows the D2 Premium portal interface with a blue header bar containing tabs: Space 01, Sample space #2, Sample space #1, Space 04 (selected), and a plus sign. Below the header is a navigation bar with links: All versions, Main, New, Import, Document, Help, and a search bar.

The main content area is divided into two horizontal containers, each with a dashed border:

- Horizontal (1):** This container contains:
 - A left sidebar titled "Browser EN" showing a tree view of "Form" and "Form Hygiene" sections.
 - A central "List View" table with columns: Name, Title, Status, Modified, and Modified By. It lists several items, including "QA_2011_num_0252 (0.1)" and "QA_2012_num_0270 (0.1)".
 - A right panel titled "Preview" with the message "No preview available".
- Horizontal (2):** This container contains:
 - A left sidebar titled "Task folders" showing a tree view of "Tasks (12)" under "QA Tâches de validation" and "QA Validation Tasks (12)".
 - A right panel titled "Tasks" with a list of subjects, each with a small icon and text:
 - Document "QA_2012_num_0269" authoring
 - Document "QA_2012_num_0282" authoring
 - Document "QA_2012_num_0284" authoring
 - Document "QA_2012_num_0285" authoring
 - Document "QA_2012_num_0286" authoring
 - Document "QA_2012_num_0287" authoring
 - Document "QA_2012_num_0288" authoring
 - Document "QA_2012_num_0289" authoring

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Workspace: Vertical Container

- This container is for widgets or any others 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 vertical container enter the name on the configuration name in **<widget config>**
 - <vertical-container>
 - <content>
 - <widget config="taskfolders"/>
 - <widget config="tasks"/>
 - </content>
 - <vertical-container>
 - <content>
 - + <horizontal-container>
 - + <accordion-container>
 - + <horizontal-container>
 - </content>
 - </vertical-container>

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

Space 04: Vertical container XML

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

```
<?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

- Preview of XML vertical container (Sample04)

The screenshot shows a D2 Premium portal interface with a vertical container preview for Space 04. The top navigation bar includes tabs for Space 01, Sample space #2, Sample space #1, Space 04, and a search bar. The left sidebar has links for All versions, Main, New, Import, Document, and Help.

The main content area is divided into several vertical containers:

- Left Column:** A tree view under "Browser EN" showing categories like Form, Documentation, IT, Quality control, ectd-hr_components, ectdv333_sample (1)_components, Form Hygiene, and Instruction/Procedure.
- Properties:** A table listing properties such as Name, Title, Status, Modified, and Modified By.
- Favorites:** A list of favorite items including D2-Solution, hu-cover-letter, Labelling_2011_00420, QA_2011_num_0215, and QA_2011_num_0252.
- Search:** A search bar.
- Locations:** A table showing folder paths.
- Versions:** A table showing document versions.

The central area contains a "List View" table and a "Preview" section:

- List View:** A table showing documents with columns for Name and Title. One document, QA_2012_num_0268, is selected and labeled "Test".
- Preview:** A large empty box with the message "No preview available".

The right side of the interface includes:

- Task folders:** A list of tasks under "Tasks (12)".
- Task attachments:** A list of attachments.
- Task notes:** A list of notes.
- Tasks:** A list of tasks under "Subject".

Workspace: To configure a module

- When XML files are defined, access the Workspace module using Widgets View menu or configuration matrix.
- Enter the General Properties of module: Name, Description , Application

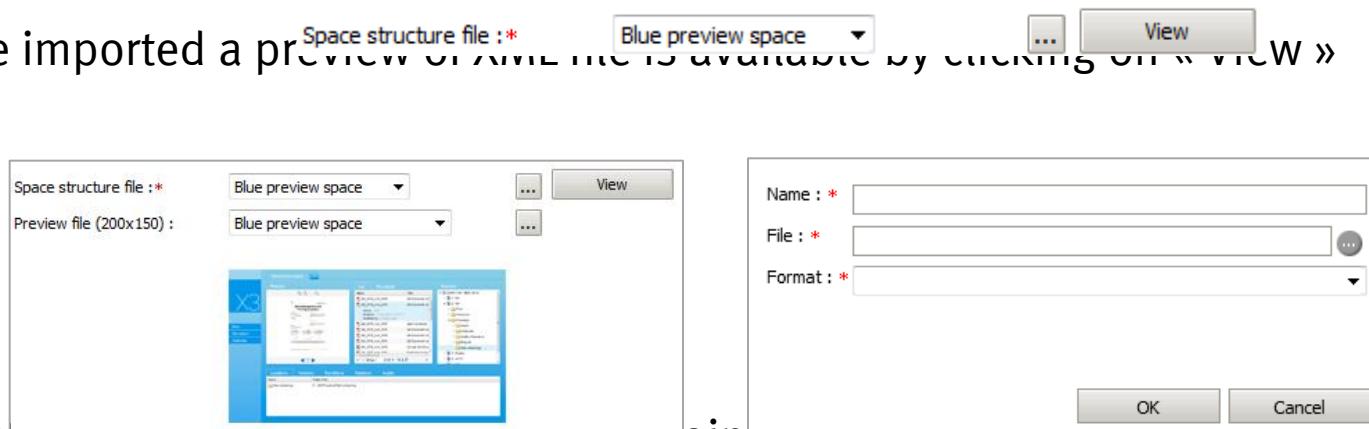
The screenshot shows the 'Properties' section of a workspace configuration. It includes fields for 'Name' (containing 'Blue preview space'), 'Description' (empty), and 'Applications' (containing 'X3'). There are also standard UI controls like a toolbar with a plus sign and a delete button.

- Enter label and description for each application languages. These information will appear in the workspaces gallery of user.

The screenshot shows language-specific configuration fields for a workspace module. It includes:
Label fr :* Espace prévisualisation bleu
Label en :* Blue preview space
Description fr :* Espace standard avec arborescence, liste et onglets d'informations.
Description en :* Classic space with tree, list view and information tabs included.

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 above.
- 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.

Widgets

D2 4.0

EMC²

Widget: Overview

- 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.

Widget: Create widgets module

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

The screenshot shows the 'X3 > Widget' interface. The top menu bar includes File, Data, Creation, Interface, C2, P2, P2eCTD, X3, Tools, and Help. Below the menu is a toolbar with icons for Matrix, Go to..., New, Create from..., Save, Cancel, Delete, and All elements. A sidebar on the left lists various 'Widgets' such as quicksearch, relations, renditions, search, taskattachment, taskdetails, taskfolders, tasknotes, taskperformers, tasks, testopenajax, todo, users, vd, versions, weather, X3 - Audit, X3 - CenterStage browser, X3 - CenterStage comments, X3 - Check Out Document, X3 - Database browser, X3 - Doclist, X3 - Dump, X3 - Favorites, X3 - Hub, X3 - Locations, X3 - Predefined search, X3 - Preview, and X3 - Properties. The 'X3 - Properties' item is currently selected and highlighted with a blue border. The main workspace is titled 'Properties' and contains fields for Name (* X3 - Properties), Description, Applications (X3), Label fr (Properties), Description fr (Properties dialog), Label en (Properties), Description en (Properties dialog), Label pt (Properties), Description pt (Properties dialog), Label ja (Properties), Description ja (Properties dialog), Widget type (* PropertiesWidget), and Preview file (200x150). There is also a preview window showing a small thumbnail of the widget.

Widget: Create widgets module

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

Name : audits

Description :

Applications : X3

[...]

[+]

[X]

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

Label fr :	Docbase browser	Description fr :	Docbase browser
Label en :	Docbase browser	Description en :	Docbase browser

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

Widget type :* BrowserWidget

Preview file (200x150) :

- 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.

Widget: 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.



The table shows the configuration elements for the 'QA Quality group' context. The 'checkoutdocument' element is highlighted with a yellow background, and a cursor icon is pointing at the checkbox for the 'Default' context.

Configuration elements	QA Quality group	Default
c6	✓	✓
calendar	✓	✓
centerstage	✓	✓
centerstage comments	✓	✓
centerstagecomments	✓	✓
checkoutdocument	✓	✓
docgallery	✓	✓

Widget: External Widget

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



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

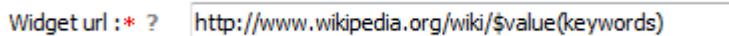
Widget url : * ? <input type="text" value="\$GADGET_SERVER/gadgets/ifr?url=\$GADGET_SERVER/"/>	Communication channel :
	<input type="text" value="X3_SHOW_DOCUMENT"/>

- 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 : * ?

- WARNING:** To use the Gadgets, you must imperatively have filled the URL of your Gadget server in Widget View options.

Widget: 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.

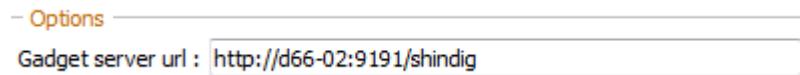
Communication channel :
or :

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.

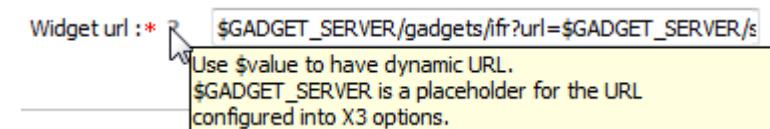
Widget: External Widget

- 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



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



- 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.

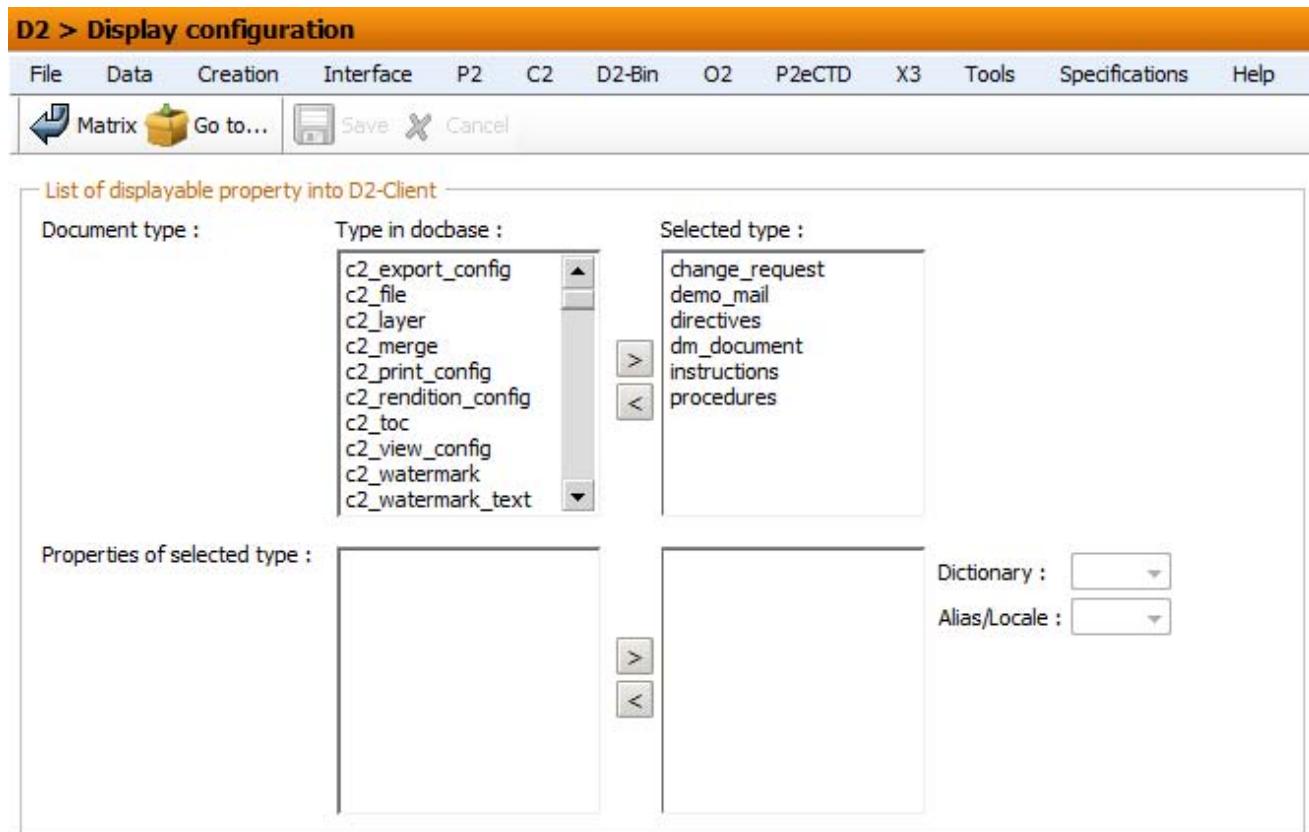
Global Display configuration

D2 3.1 et 4.0

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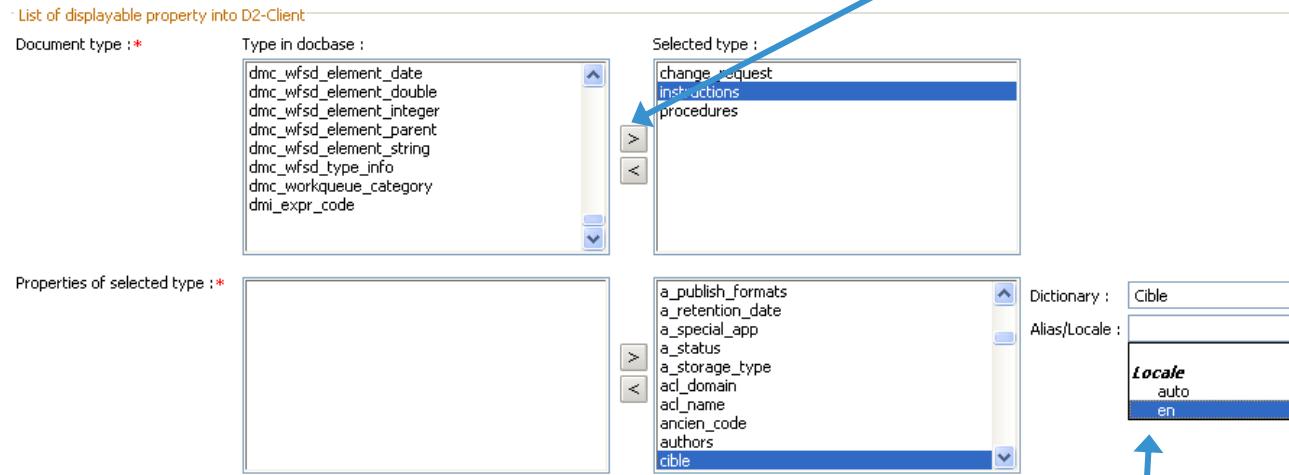
Display configuration

- By default, the entire type and property list from the repository is available for the user interface. Within D2, you can customize the display making available or not, some of these type or property.
- You can also map a dictionary value for the selected properties.



Display configuration

- Select types to add, then their properties. Use the arrow to add or remove items from the selection list



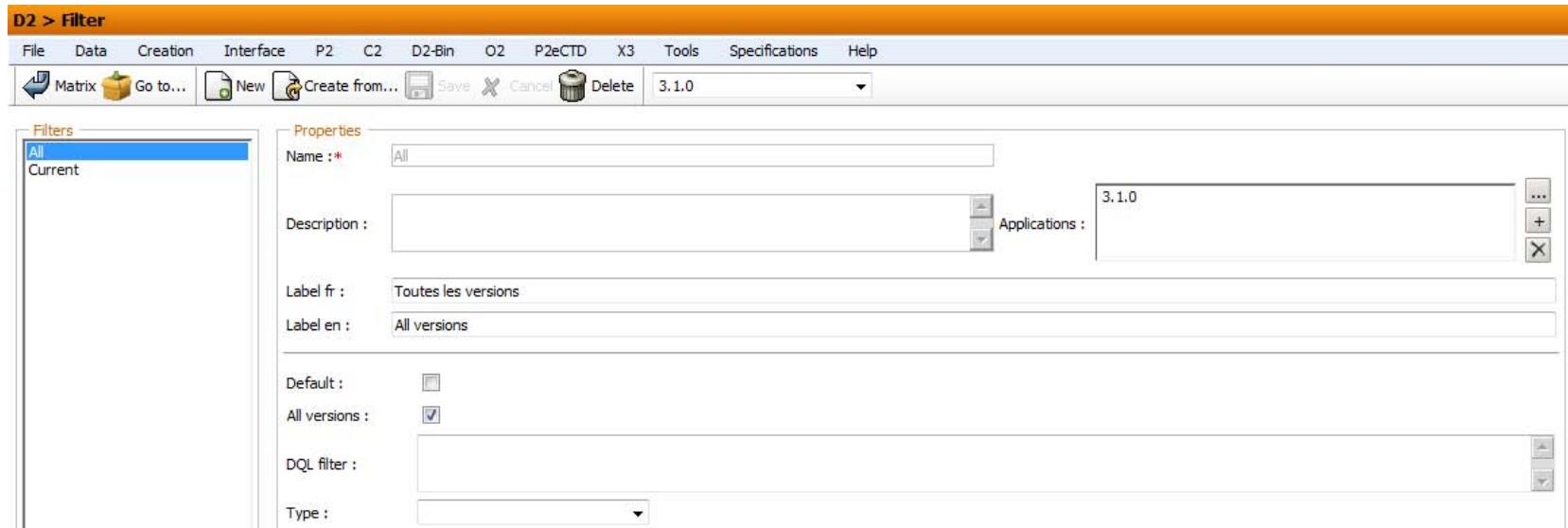
- The property mapping is also available for the resolution of values when displayed in the columns.
- Select the property to map, then the dictionary and alias/language.
- Once the display configuration valid, the values set for the user interface columns and mapped are resolved with the corresponding dictionary value.

Filters

EMC²

Display filters

- D2 makes it possible to define display filters different from the two default ones which are: « **Current version** » and « **All versions** »
- To define a new filter, click the icon  the configuration matrix



Display filters

- Enter the filter name and description
- Enter the label which will appear in the filter selection
- Check the box if the filter is the default
- Check the box if you want to display all versions

Properties

Name : * Draft

Description : All document in DRAFT status

Label fr : Draft

Label en : Draft

Default :

All versions :

DQL filter : a_status = 'Draft'

- Enter the DQL request defining the filter
- Refine this filter by specifying the object type which is applied to.

Type :

procedures

controlled_document

d2c_note

d2c_query

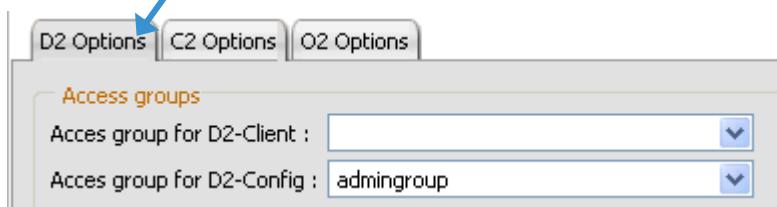
d2c_query_category

- Check this configuration for the « Default » context to apply this filter to everyone and on all folders
- You can also define a context based on a folder or a group of users to reduce the perimeter of the filter

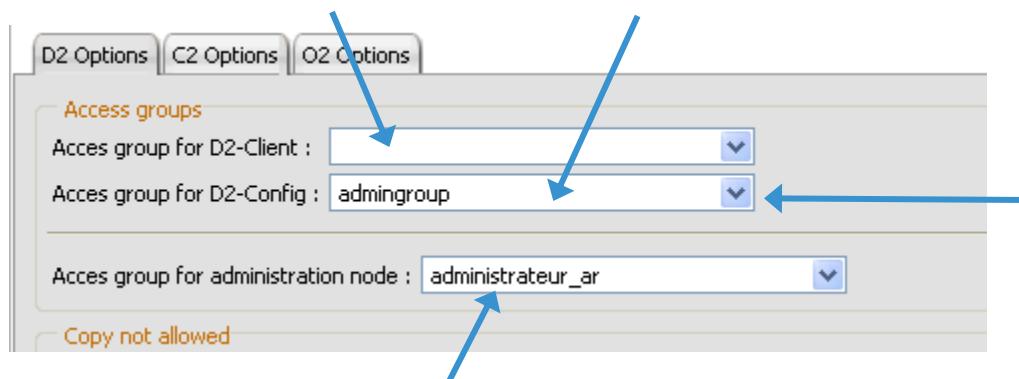
D2 Tools

Administration groups

- Administration groups of dictionaries, taxonomies, and template lists can be filled in the « Options » screen
- Select “D2 Options”



- Access group to D2-Client and to D2-Config (all if empty)



- Access group to the administration node in the D2-Client

Did you migrate from an earlier version?

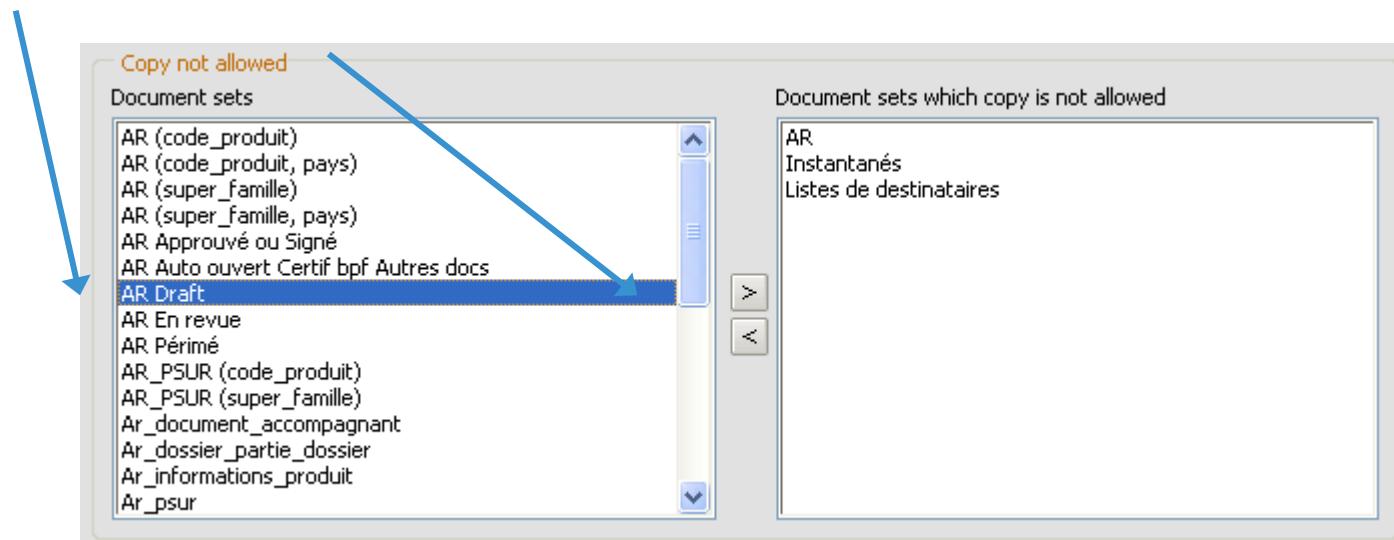
You can henceforth manage D2-Config with administrators other than “dmadmin”

In D2 Options, select an administration group and save configuration.

The ACL are then computed again. Only users in the selected group can access and manage D2-Config

To denied documents copy

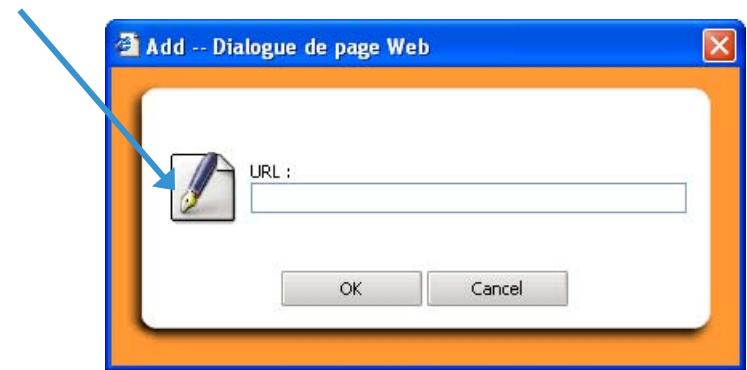
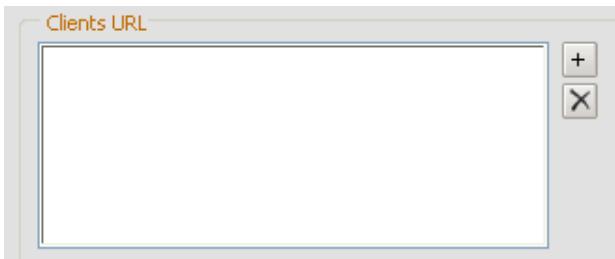
- Some content must not be copied, for example, content where the « object_name » is auto named with a counter (this will remove the unicity of it)
- This is configurable in the « Options » screen
- Click the context where copy must be denied then on « > » to add it in the list



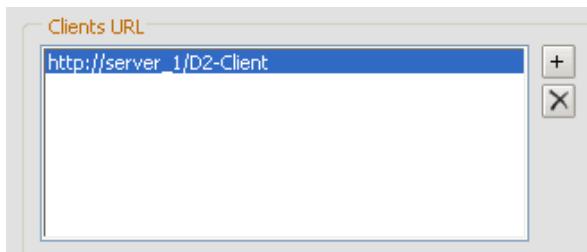
- To remove one, CLICK IT IN THE LEFT hand side list then on « < »

To use several application servers

- If you want to use several application servers, you have to enter the list in the « Options » screen in order to make it possible to push the configuration modifications done in D2-Config towards the other D2-Client servers
- Click « + » to add a server, and enter its URL



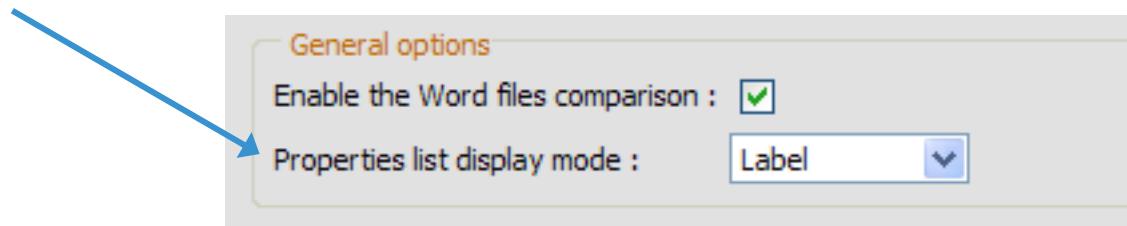
- To remove one, select it and click « x »



- This feature is useful to refresh automatically caches of application servers for example when you edit C2 configurations.

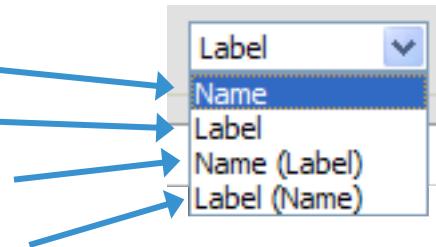
Properties labels

- D2 makes it possible to define the display mode for properties
- In general options, you can select the display mode for properties



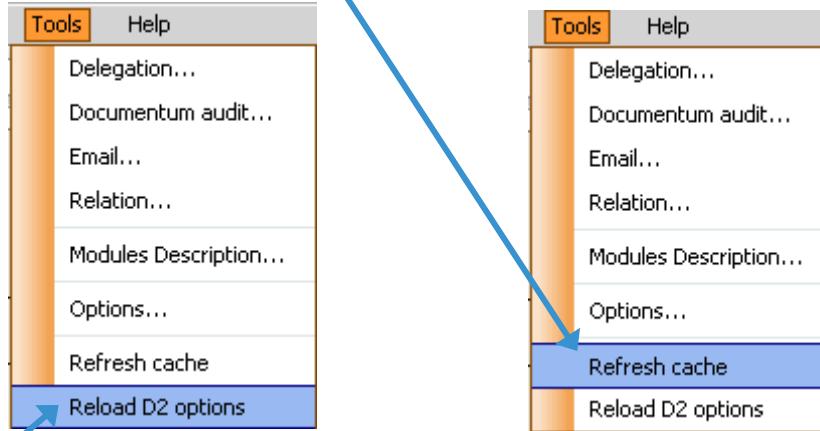
- The different options are:

- Name only
- Label only
- Name following by label
- Label following by name



Tools

- D2 2.6 release adds two new features to the menubar « Tools »
- The first is a « Refresh cache » capability to rebuild the cache normally done when the server starts, accessible from the administration interface.



- The second is a « Refresh cache », which rebuilds the cache normally done when the server starts, accessible from the administration interface.
- The second is a « Reload D2 options », which reloads the D2-Config.properties. After editing this files, go directly to this option, you do not need to restart your application server anymore.
- D2 options are then reloaded, and Logging configuration for D2-Config as well.

Monitoring window

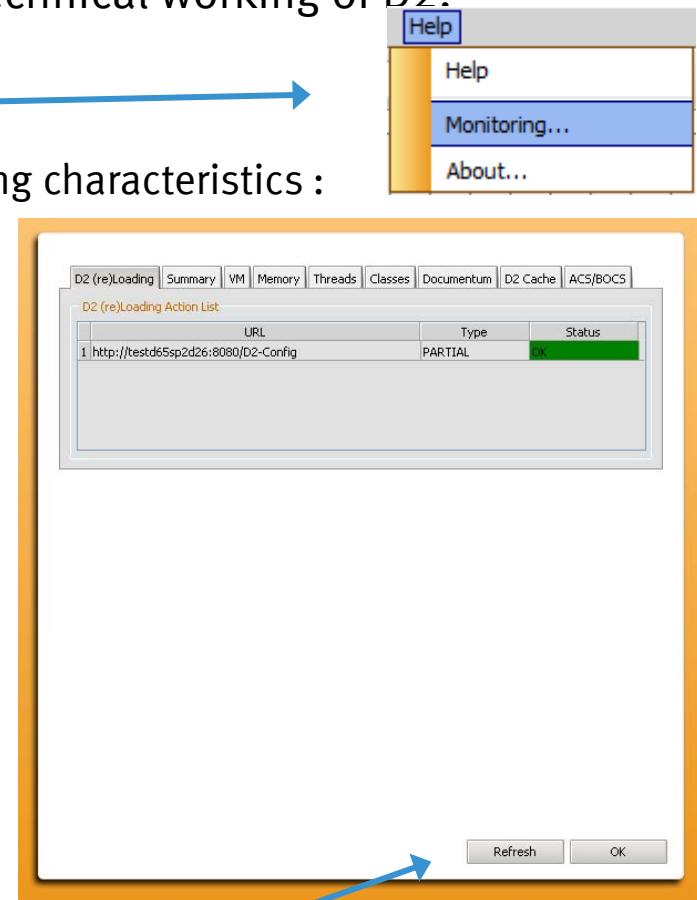
Monitoring window

It is possible from D2-Config interface, to supervise the technical working of D2.

This dialog box is available from « ? » menu.

It contains many tabsheets allowing the display of this following characteristics :

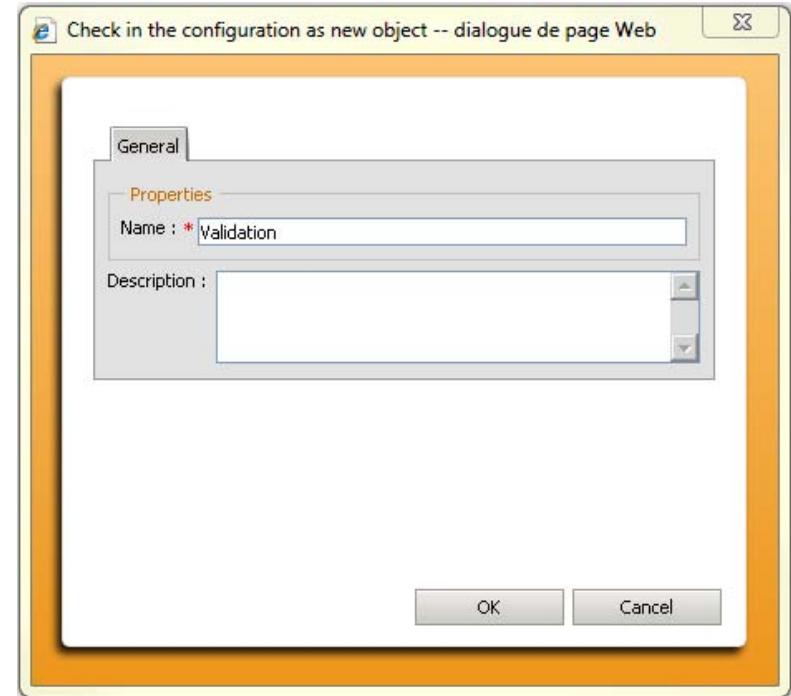
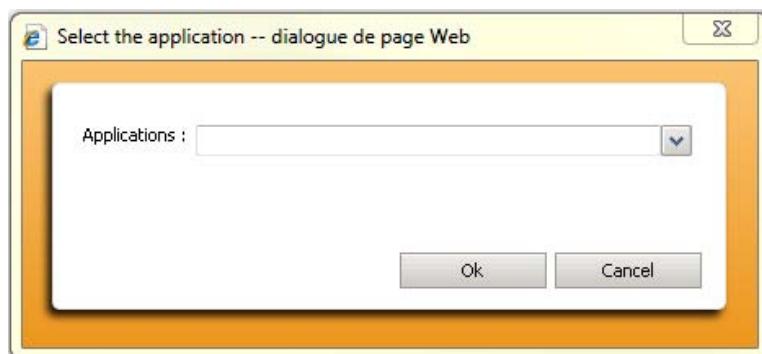
- **D2 reloading:** state of D2 on application servers and checking URL
- **Informations about the JVM executing D2:**
 - *Summary:* on operating system
 - *VM:* on virtual machine
 - *Memory:* on various memory status
 - *Threads:* on Java processes
 - *Classes:* on various classes way
- **Information about active sessions and Documentum resources.**
- **D2 Cache:** number of cache in use with all statistical information
- **ACS et BOCS:** URL status of ACS and BOCS configured with DA.
- **By clicking on this button, you can refresh all monitored data information.**



Configuration management

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* ».

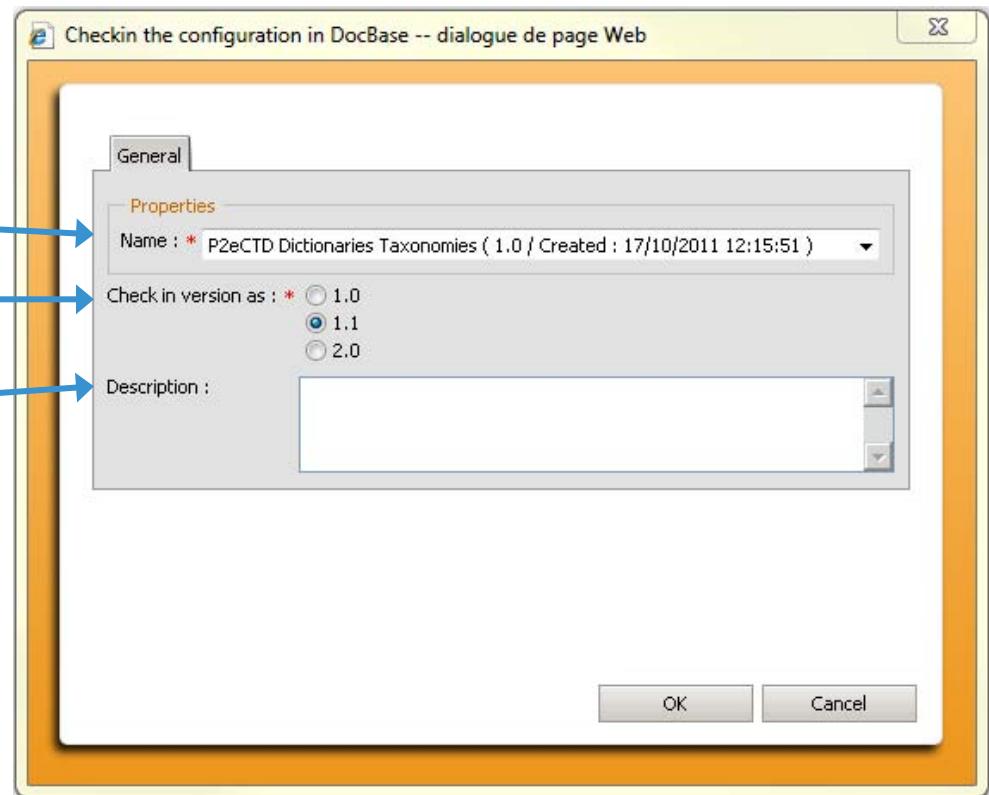
Configuration backup

EMC²

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

To backup a configuration

- To view the version number of the ongoing configuration
- Informations about *Solution* and *System* are displaying into two tabsheets

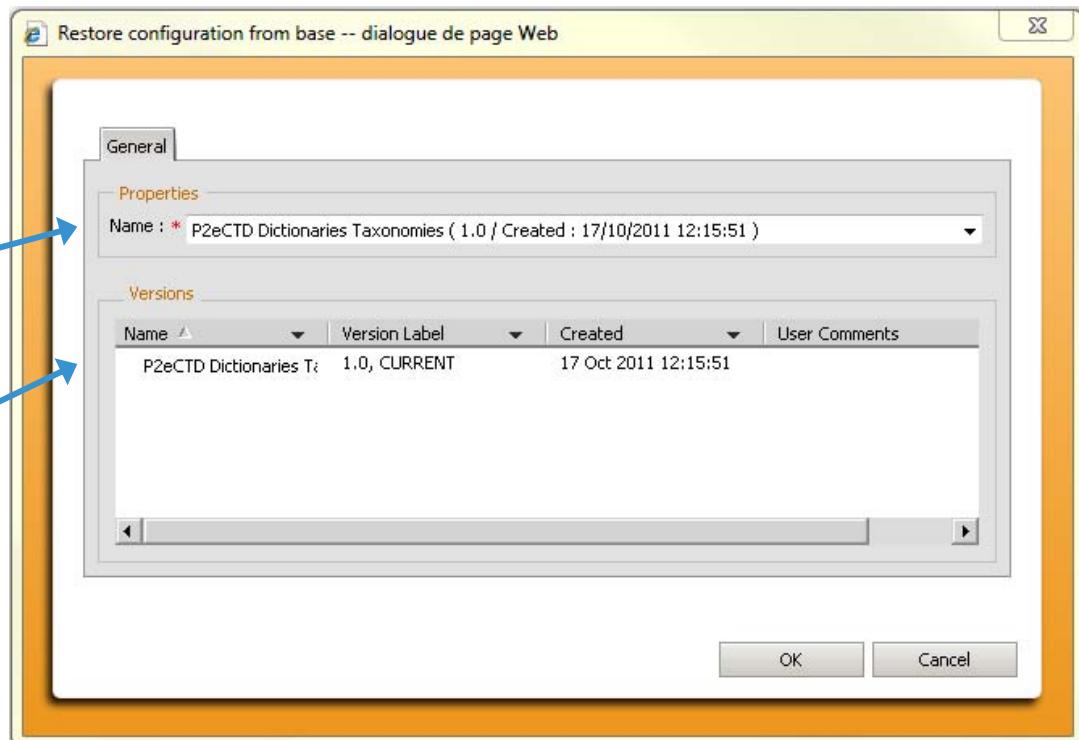
Configuration restoration

EMC²

To restore a configuration

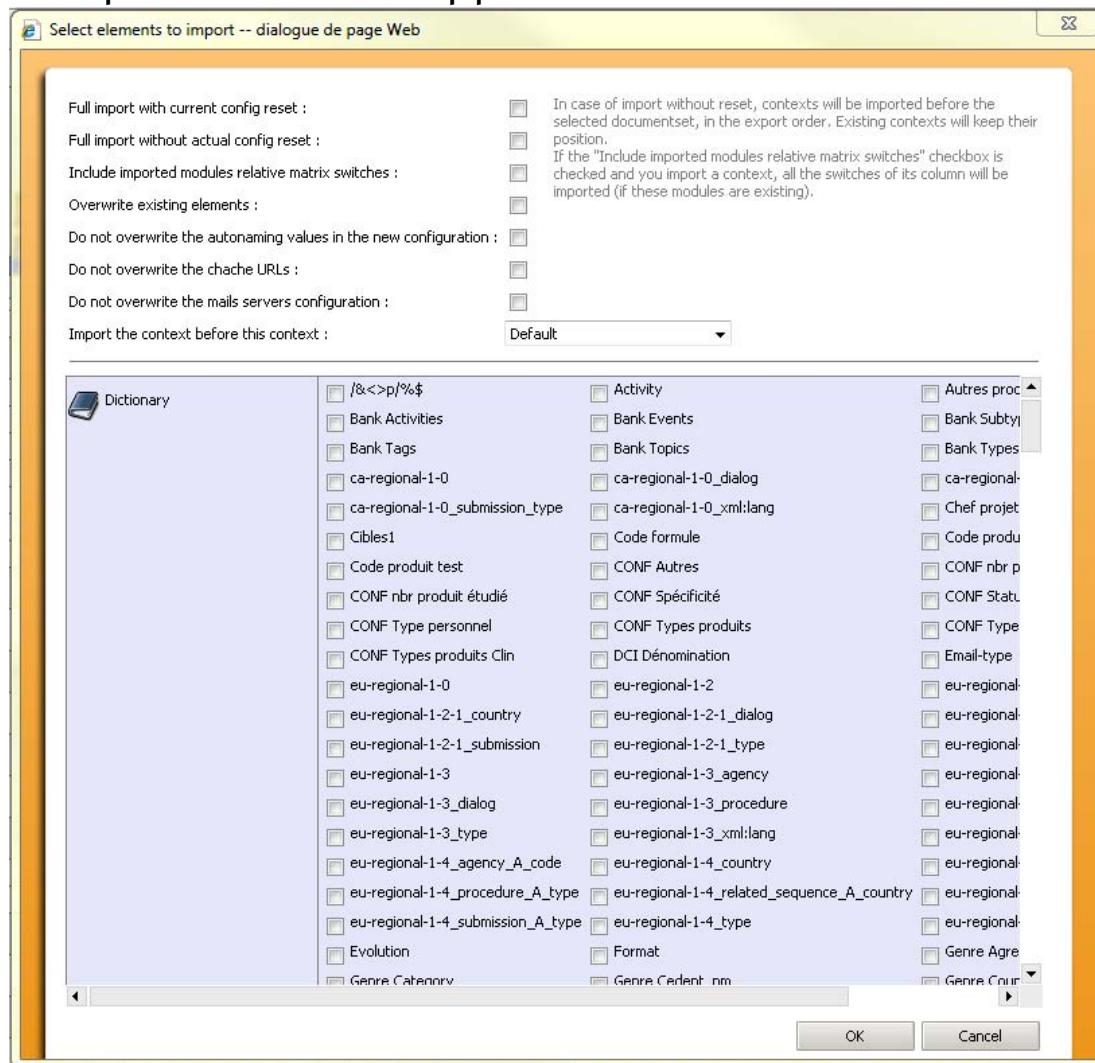
- To restore a configuration from the repository

- 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 :

In case of import without reset, contexts will be imported before the selected documentset, in the export order. Existing contexts will keep their position.

Full import without actual config reset :

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).

Include imported modules relative matrix switches :

Overwrite existing elements :

Do not overwrite the autonaming values in the new configuration :

- ~~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 :

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).

Overwrite existing elements :

Do not overwrite the autonaming values in the new configuration :

Do not overwrite the cache URLs :

- The ~~checkboxes of the column for the existing modules~~

s of

To restore a configuration

- To erase existing elements by imported ones, check the box. They will keep their position

Full import with current config reset :

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).

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

- Check the box if you want to keep the existing values of auto naming counts
- You can keep URLs caches of the current configuration (Tools menu)

Do not overwrite the cache URLs :

Do not overwrite the mails servers configuration :

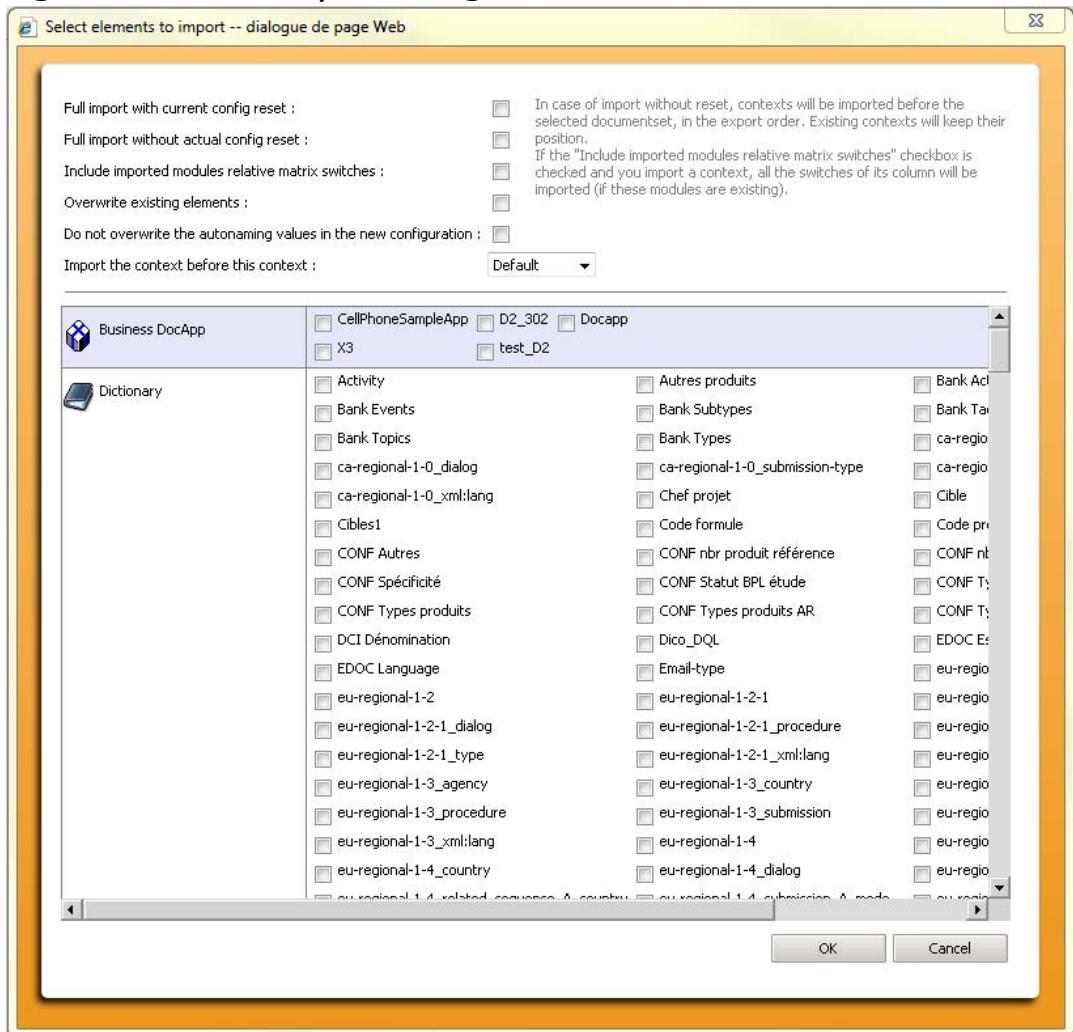
- And server mail setting (Tools Menu)
- It is possible to select location into configuration matrix of imported contexts.

Import the context before this context :

Default 

To restore a configuration

- In the case of a selective import of a part of the configuration, select the modules to import by clicking in the corresponding check boxes



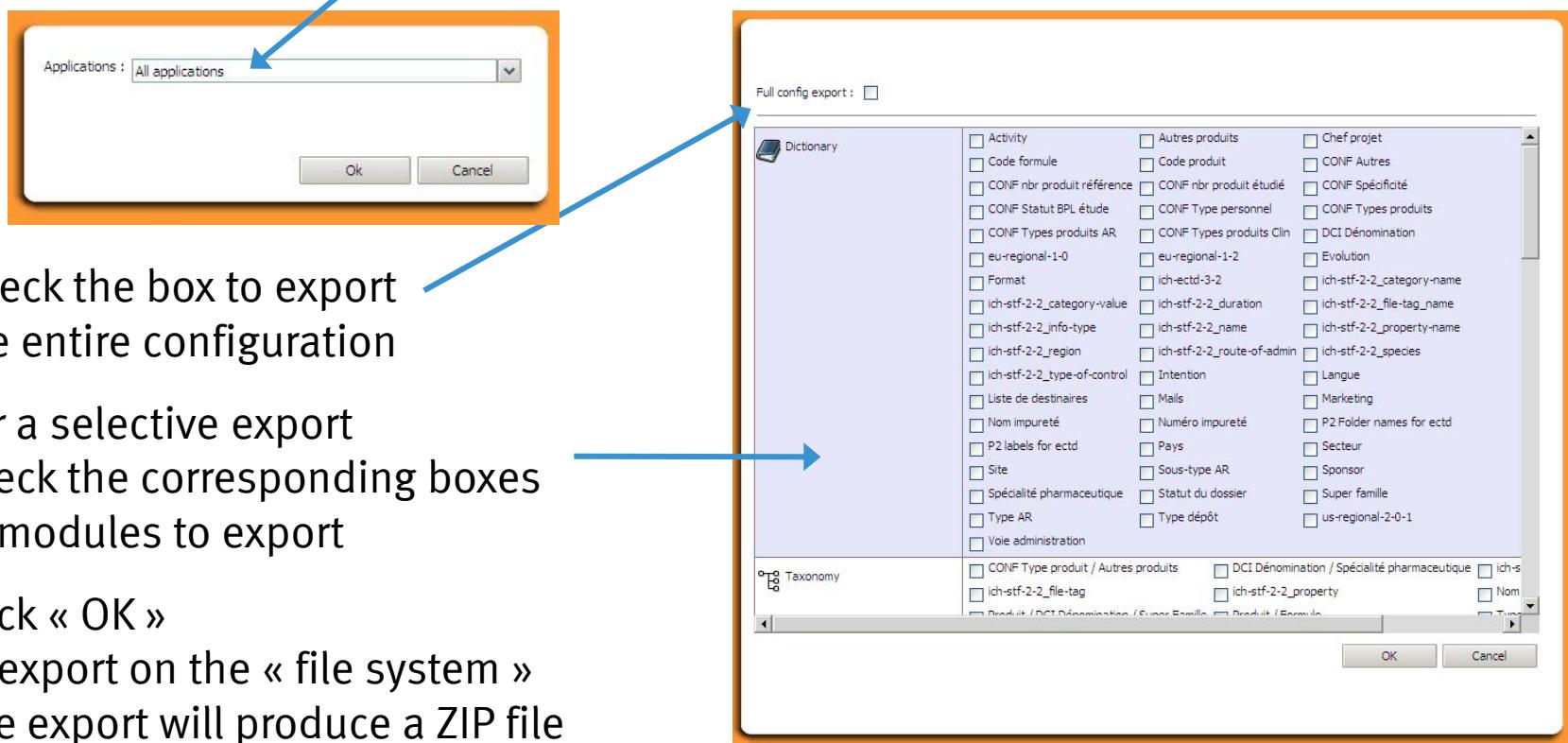
- Click « OK »
to import
the configuration

Configuration export

EMC²

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 »



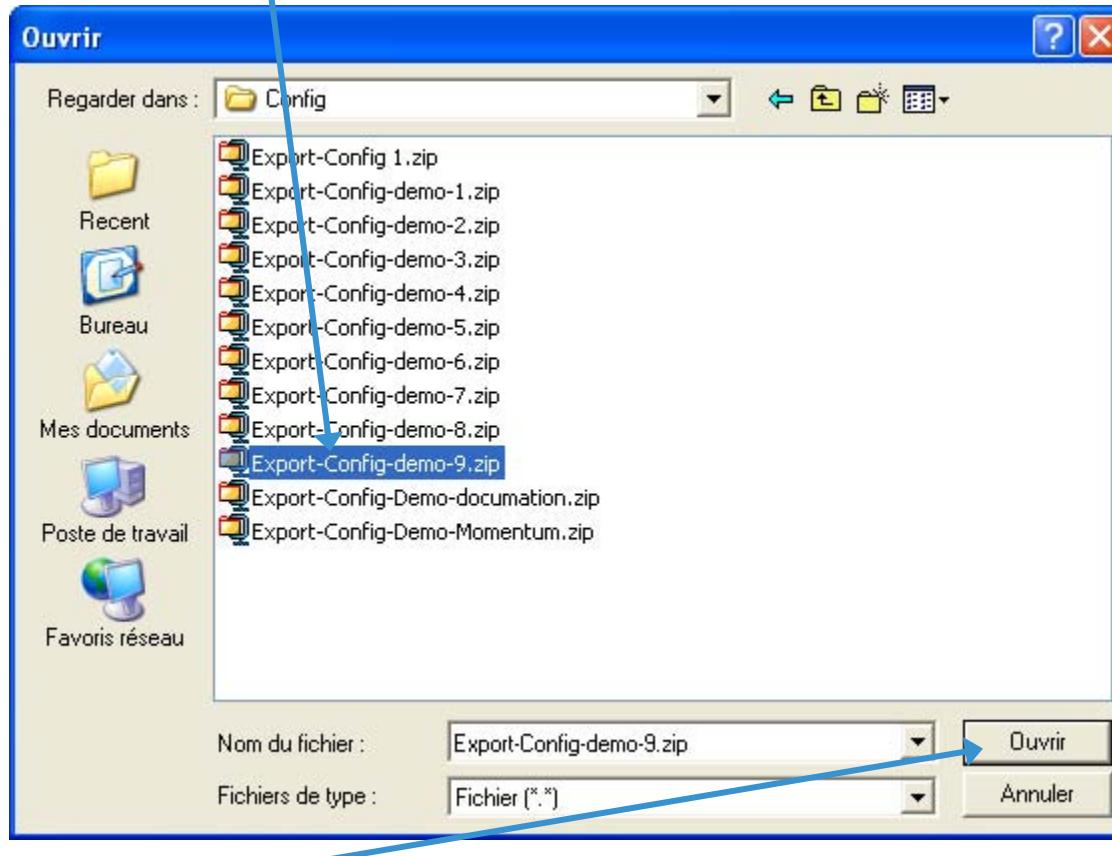
- Check the box to export the entire configuration
- For a selective export check the corresponding boxes to modules to export
- Click « OK » to export on the « file system »
The export will produce a ZIP file

Configuration import

EMC²

To import a configuration

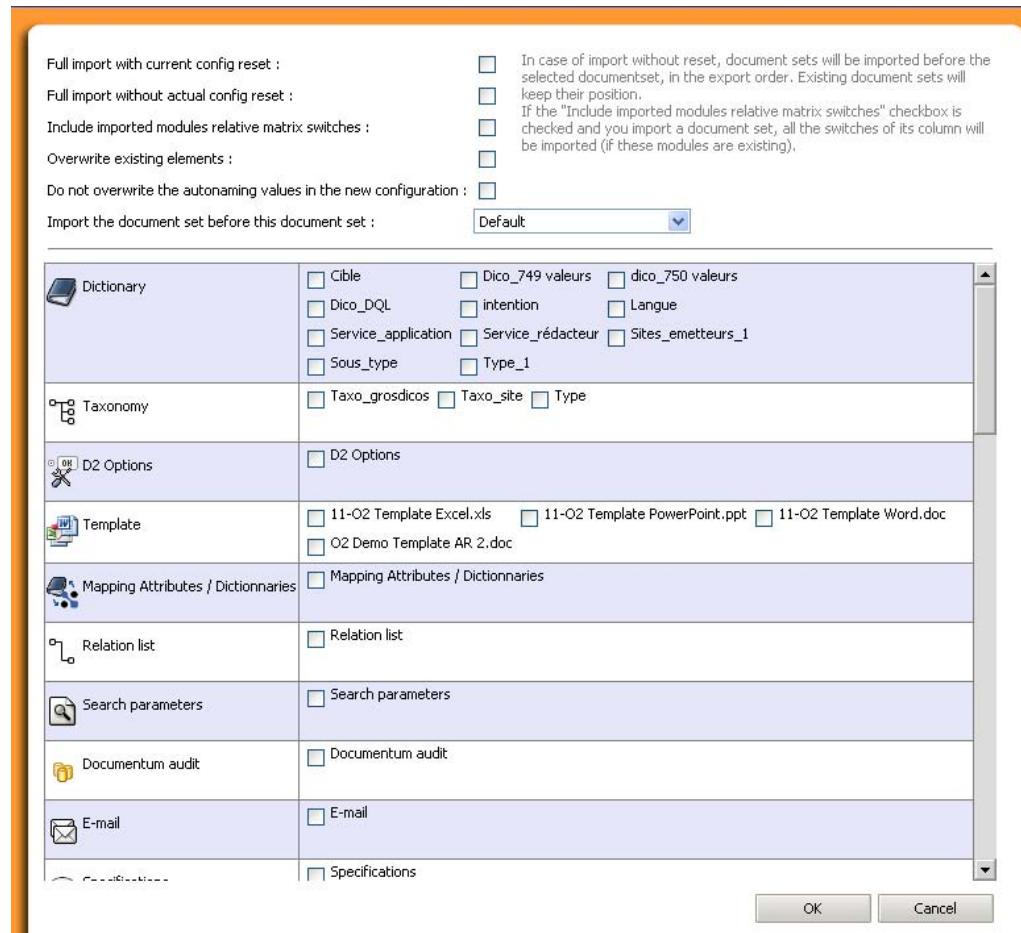
- To import a configuration from the « file system »
- Select the configuration file (ZIP file) to import



- Then click « Open » to import the configuration

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 xxxxxxx] [-docbase docbase_name] [-config_file file_config_path] [-full_import true|false] [-reset true|false] [optional parameters] [modules list]`
- Classpath must 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)

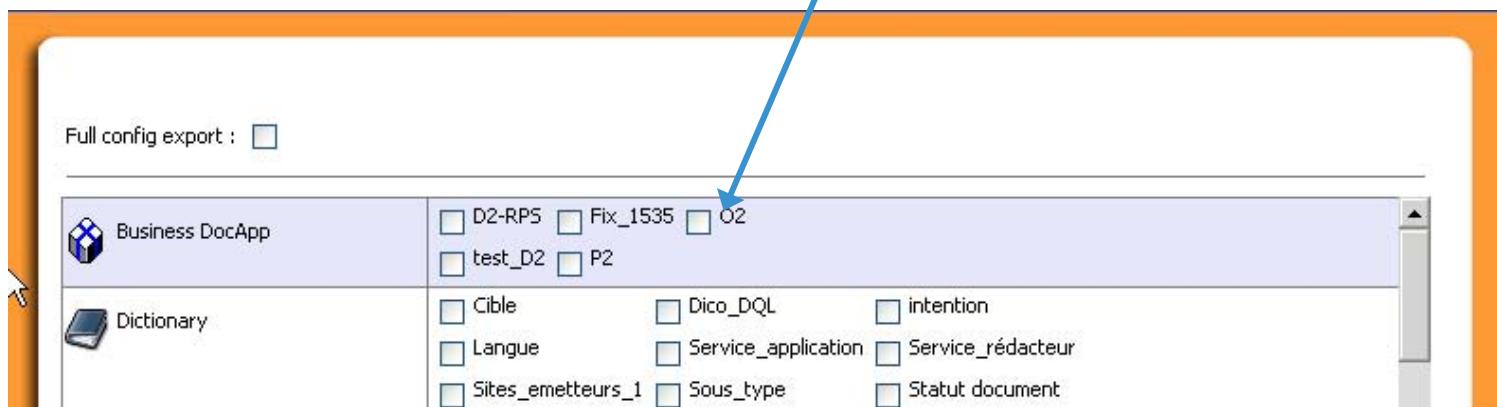
- Following parameters are useful into command line:
 - Required:
 - login : repository connection login
 - password : repository connection password
 - docbase : repository name
 - config_file : configuration file
 - full_import : full or custom import
 - reset : reset of the existing configuration
 - 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.

DocApp export/ import

EMC²

To export and import DocApp

- You can export and import the functional DocApp contained in the repository in same time as configurations.
- To do this, check the elements concerned into the export or import window of configuration.



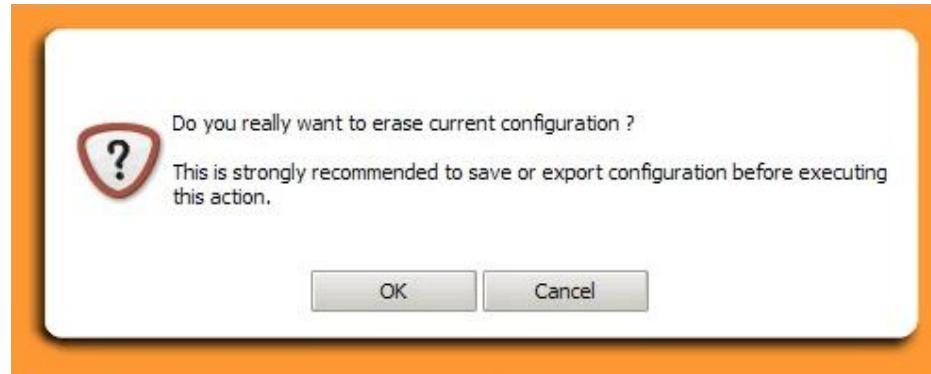
- This feature enables export of all DocApp created manually using Documentum Application Builder.
- Only third-party DocApps are affected by this process of import/export.

The DocApp import/export is only available if the DDS.Jar has been added to D2 Config library (Cf IG_D2_3.0.0_EN).

In addition, this functionality is not handled for DocApp managing pre and post processes.

To reset a configuration

- To reset a configuration



- Click « OK »
- ⚠** This will fully remove the ongoing configuration

Appendices

Appendix

- Appendix 1 : Dates format
- Appendix 2 : Jobs
- Appendix 3 : Actions in menu
- Appendix 4 : List of reserved words
- Appendix 5 : List of widgets
- Appendix 6 : List of communication channels
- Appendix 7 :

Appendix 1 : Dates format

Date and Time Patterns

- Date and time formats are specified by *date and time pattern* strings. Within date and time pattern strings, unquoted letters from 'A' to 'Z' and from 'a' to 'z' are interpreted as pattern letters representing the components of a date or time string. Text can be quoted using single quotes ('') to avoid interpretation. "''' represents a single quote. All other characters are not interpreted; they're simply copied into the output string during formatting or matched against the input string during parsing.
- The following pattern letters are defined (all other characters from 'A' to 'Z' and from 'a' to 'z' are reserved):

Letter	Date or Time Component	Presentation	Examples
G	Era designator	Text	AD
y	Year	Year	1996; 96
M	Month in year	Month	July; Jul; 07
w	Week in year	Number	27
W	Week in month	Number	2
d	Day in year	Number	189
a	Day in month	Number	10
F	Day of week in month	Number	2
E	Day in week	Text	Tuesday; Tue
a	Am/pm marker	Text	PM
H	Hour in day (0-23)	Number	0
k	Hour in day (1-24)	Number	24
K	Hour in am/pm (0-11)	Number	0
h	Hour in am/pm (1-12)	Number	12
m	Minute in hour	Number	30
s	Second in minute	Number	55
S	Millisecond	Number	978
z	Time zone	General time zone	Pacific Standard Time; PST; GMT-08:00
z	Time zone	RFC 822 time zone	-0800

Appendix 1 : Dates format

- **Text:** For formatting, if the number of pattern letters is 4 or more, the full form is used; otherwise a short or abbreviated form is used if available. For parsing, both forms are accepted, independent of the number of pattern letters.
- **Number:** For formatting, the number of pattern letters is the minimum number of digits, and shorter numbers are zero-padded to this amount. For parsing, the number of pattern letters is ignored unless it's needed to separate two adjacent fields.
- **Year:** For formatting, if the number of pattern letters is 2, the year is truncated to 2 digits; otherwise it is interpreted as a number. For parsing, if the number of pattern letters is more than 2, the year is interpreted literally, regardless of the number of digits. So using the pattern "MM/dd/yyyy", "01/11/12" parses to Jan 11, 12 A.D.
- For parsing with the abbreviated year pattern ("y" or "yy"), SimpleDateFormat must interpret the abbreviated year relative to some century. It does this by adjusting dates to be within 80 years before and 20 years after the time the SimpleDateFormat instance is created. For example, using a pattern of "MM/dd/yy" and a SimpleDateFormat instance created on Jan 1, 1997, the string "01/11/12" would be interpreted as Jan 11, 2012 while the string "05/04/64" would be interpreted as May 4, 1964. During parsing, only strings consisting of exactly two digits, as defined by [Character.isDigit\(char\)](#), will be parsed into the default century. Any other numeric string, such as a one digit string, a three or more digit string, or a two digit string that isn't all digits (for example, "-1"), is interpreted literally. So "01/02/3" or "01/02/003" are parsed, using the same pattern, as Jan 2, 3 AD. Likewise, "01/02/-3" is parsed as Jan 2, 4 BC.
- **Month:** If the number of pattern letters is 3 or more, the month is interpreted as text; otherwise, it is interpreted as a number.

Appendix 1 : Dates format

- **General time zone:** Time zones are interpreted as text if they have names. For time zones representing a GMT offset value, the following syntax is used: *GMTOffsetTimeZone: GMT Sign Hours : Minutes Sign: one of + - Hours: Digit Digit Digit Minutes: Digit Digit Digit*: one of 0 1 2 3 4 5 6 7 8 9 *Hours* must be between 0 and 23, and *Minutes* must be between 00 and 59. The format is locale independent and digits must be taken from the Basic Latin block of the Unicode standard. For parsing, RFC 822 time zones are also accepted.
- **RFC 822 time zone:** For formatting, the RFC 822 4-digit time zone format is used: *RFC822TimeZone: Sign TwoDigitHours Minutes TwoDigitHours: Digit DigitTwoDigitHours* must be between 00 and 23. Other definitions are as for general time zones.
- **Examples**
- The following examples show how date and time patterns are interpreted in the U.S. locale. The given date and time are 2001-07-04 12:08:56 local time in the U.S. Pacific Time time zone.

Date and Time Pattern	Result
"yyyy.MM.dd G 'at' HH:mm:ss z"	2001.07.04 AD at 12:08:56 PDT
"EEE, MMM d, ''yy"	Wed, Jul 4, '01
"h:mm a"	12:08 PM
"hh 'o''clock' a, zzzz"	12 o'clock PM, Pacific Daylight Time
"K:mm a, z"	0:08 PM, PDT
"yyyyy.MMMMMdd GG hh:mm aaa"	02001.July.04 AD 12:08 PM
"EEE, d MMM yyyy HH:mm:ss z"	Wed, 4 Jul 2001 12:08:56 -0700
"yyMMddHHmmssZ"	010704120856-0700

Appendix 2 : Jobs

Several jobs are available in the D2 Solution :

D2ImportDictionary

- This job makes it possible to import, or to update, dictionaries from Excel or csv files
- Job parameters:
 - folder: Path of folders where are located the Excel or csv files
folders must be separated by comma
(Paths must be valid on the content server)
 - separator: separation character for csv
 - overwrite: makes it possible to erase the dictionary
 - sorted: makes it possible to sort the dictionary
 - update: makes it possible to add the imported dictionary to the list of dictionary of the job that update the autolinks
(The update autolink job will run the autolink to take into account the dictionaries modifications)
- Frequency: 1/Day
- State: Inactive

Appendix 2 : Jobs

D2JobImportTaxonomy

- This job makes it possible to import, or to update, taxonomies from Excel or csv files
- Job parameters:
 - folder: Path of folders where are located the Excel or csv files
folders must be separated by comma
(Paths must be valid on the content server)
 - separator: separation character for csv
- Frequency: 1/Day
- State: Inactive

Appendix 2 : Jobs

D2CreateRendition

- This job makes it possible to request a rendition of a document, or of the document and its components if it is a virtual document
- Job parameters:
 - id: ID of target document

Appendix 2 : Jobs

D2JobImportMassCreate

- This job makes it possible to import and fill in massively content with their Documentum properties from XML files (linked to each file)
- Job parameters:
 - folder: Path where are located files to import. Each document should have an XML file with the exact same name (file ext. changes). (Path must be valid on the content server)
 - imported_file_folder: (opt) folder for succeed imported files. By default, an « *imported_files* » folder will be made under the source folder.
 - createconfig: (opt) the creation config object_name to use. By default, « r_object_type» property must be found into XML files.
 - args: (opt) used with « *createconfig* », for values, coma separated (,) to compute the create config line to use.
 - async: (default → false) async creation
 - naming: (default → true) When it has the value “True” the naming is applied when the creation process otherwise, it will used when properties are regenerated.
 - unicity (default → true) When it has the value “False” the control upon the naming is desactivating despite the current configuration.
- Frequency: 1/Day
- State: Inactive

Appendix 2 : Jobs

D2JobImportMassCreate (2)

- Properties XML files must be made up as following :



- Imported content in the repository must be associated to an XML file including the file name of the imported document (in a case of content with contents).
- The XML file **filename-meta.xml** enables import of XML contents as well as, their meta-data. It also offers the ability to fill-up properties of an empty document, while it is not associated to any document.

Appendix 2 : Jobs

D2JobCoreDeQueue

This job allows to apply D2CoreMethod on the objects located into d2c_mass_create_queue table

- Job parameters :
 - **-scan_queue** (default → true): launch scan queue
 - **-naming**: When it has the value “True”, the naming is applied when the queue is scanned
 - **-create**: simulation of the document creation to launch naming
- Frequency : 1/Day
- State : Active

Appendix 2 : Jobs

D2JobDocbaseUpdate

- This job makes it possible to automatically update autolink, following the modification of a dictionary
- Update requests are posted in the queue “d2_update_docbase_queue”
- Job parameters:
 - None
- Frequency: 1/Day
- State: Active

Appendix 2 : Jobs

D2JobLifecycleBatch

- This job makes it possible to automatically change the state of content
- Content to manage are detected with the configuration matrix of D2-Configuration. The job browses all configurations and applies the batch on the identified content
- Job parameters:
 - None
- Frequency: 1/Day
- State: Active

Appendix 2 : Jobs

D2JobMailing

- This job makes it possible the automatic sending of emails
- Content to manage are detected with the configuration matrix of D2-Configuration. The job browses all configurations and sends an email for each document that matches the concerned context. Detection of sent emails is managed by unicity of {document ID / Category name / Configuration name} into “d2c_mailing_audit” table.
- Job parameters:
 - None
- Frequency: 1/Day
- State: Active

Appendix 2 : Jobs

D2JobRemoveEmptyFolder

- This job makes it possible to clean the repository by removing empty folders
- These empty folders can eventually appeared following a change with autolinks
- Job parameters:
 - -paths : List of paths in the repository separated by a comma (ex : « -paths /AR,/Clinic »). Each path is scanned in depth.
 - -parameters: Specifies the dm_folder sub_type to delete. The default value is “dm_folder”
- Frequency: 1/Day
- State: Inactive

Appendix 2 : Jobs

D2JobWFCleanerWorkflows

- This job makes it possible to clean the dynamic configurations of D2 workflows
- It makes possible to clean groups and aliases created dynamically by D2 workflows. The job scans all “d2_workflow_tracker” whose state are “ongoing” and cleans data of those where associated workflow has ended. Once cleaned, the “d2_workflow_tracker” changes to the “ended” state
- Job parameters:
 - None
- Frequency: 1/Day
- State: Active

Appendix 2 : Jobs

D2JobWFLaunchScheduledWorkflows

- This job makes it possible to launch planned D2 workflows
- When a document is launched with a D2 workflow, it is possible to plan its sending. The job scans all “d2c_workflow_tracker” whose state are « waiting » and launches workflows where the sending date is higher or equal to the date of the day. The launching is done with the user that has initiated the planning. Once sent, the “d2c_workflow_tracker” change to « ongoing » state.
- Job parameters:
 - None
- Frequency: 1/Day
- State: Active

Appendix 2 : Jobs

D2JobWFReceiveTaskMail

- This job makes it possible to receive responses from external tasks by email
- Configuration is done through the main configuration of emails in D2 as well as that of D2 workflows. The job scans the emails accounts, recovers messages and extract from it the job identification of the task. The workflow task in waiting of treatment is managed by the user “d2_mail_manager”. It is then either accepted or rejected depending on the receiving account.
- Job parameters:
 - None
- Frequency: every 15 minutes
- State: Active

Appendix 2 : Jobs

D2JobWFSendTaskMail

- This job makes it possible to send external tasks by email
- Configuration is done through the main configuration of emails in D2 as well as that of D2 workflows. The job scans the emails accounts, recovers messages and extract from it the job identification of the task. The workflow task in waiting of treatment is managed by the “user d2_mail_manager”. It is then either accepted or rejected depending on the receiving account
- Job parameters:
 - None
- Frequency: every 15 minutes
- State: Active

Appendix 2 : Jobs

D2JobWFWorkflowsNotifications

- This job makes it possible to send notification when a D2 workflow has not ended after the ended planned date
- When a document is launched in a D2 workflow, it is possible to specify the estimated ended date. The job scans all “d2c_workflow_tracker” whose state are « ongoing » and send a notification (event “d2_workflow_not_finished”) to the sender if the workflow has not ended and that the estimated ended date is exceeded. The notification will be sent at each execution of the job as long as the workflow is not ended
- Job parameters:
 - None
- Frequency: 1/Day
- State: Active

Appendix 2 : Jobs

D2JobWFCleanPopHistory (Specific to Domino server)

- This job allows you to automatically clean up the email history table (d2_wf_pop_history) history) and alert administrators of possible bugs in the “reject” and “accept” inbox messages.
- Job parameters:
 - **-month_offset** = to specify how many months emails need to be deleted
 - **-full_purge** = if *true*, all mails will be deleted including those that are flagged as representing a possible problem.
- Frequency : on demand (1/Month)
- State : Active

Appendix 2 : Jobs

D2JobDelegation

- This job makes it possible delegation (and cancelling delegation) as an system tasks
- When a delegation is configured into D2-Client, all pending tasks for the concerned user are automatically delegated when the current date lies between the starting date and the end date of the planned delegation. If the delegation is no longer valid, tasks which have been delegated are sent toward the final initial user
- Job parameters:
 - None
- Frequency: 1/Hour
- State: Active

Appendix 2 : Jobs

D2JobClean

- In order to delete dm_acl objects non used and created within D2
- To clean unused original annotations
- Job parameters:
 - clean_native_note (default → true): Default cleaning original annotations is enabled
- Frequency : 1/Day
- State : Actif

Appendix 2 : Jobs

D2JobCore

- This job enables to re-apply D2 configurations on existing objects
- Job parameters:
 - dql_filter select r_object_id from dm_document: to select related objects to the job
 - create (défaut→false): by default, it is not applied at the creation time
 - naming (défaut→true): the naming is applied to the creation (if create=*true* is selected) otherwise, it will be used for regenerating properties.
 - autolink (défaut→true): the autolink will be used for properties regeneration
 - security (défaut→true): the job is applied on the job security
 - apply_for_vd (défaut→false): the job is also applied on childs
- Frequency : 1/Day
- State : Inactive

Appendix 2 : Jobs

D2JobSubscription

- This job manage notification events made on any content.
- It processes items from *d2_subscription_queue* table in order to send
 - emails for subscribed topics on content to corresponding subscribers. Only events configured through the subscription module will be processed.
 - If the « *differed notification* » is checked for the subscription module, no email are sent, but the notification is delegated to the D2JobSubscriptionSendMail process (item is moved to the *d2_subscription_audit* table).
- Job parameters:
 - None
- Frequency : Every 5 minutes
- State : Active

Appendix 2 : Jobs

D2JobSubscriptionSendMail

- This job processes differed subscription configurations._Notification events made on any content, where user did subscribe specifically on document, will be grouped into one email sent to the subscribers mailbox
- It is launched only if the "notification differed" option is checked onto the subscription configuration module
- It treats only objects located into *d2c_subscription_audit* table
- Job parameters:
 - None
- Frequency : 1/Day
- State : Active

Appendix 3 : Actions in menus

launchIE(sType, sUrl, sFeatures, bUseAdmin)

- Parameters beginning with a "s" are of String type. They must be set between single quotes
- Parameters beginning with a "b" are of Boolean type. Possible values are true or false

- **sType:** 'modal', 'modeless' or 'window'
- **sUrl:** Url to be opened in a new window

The following parameters are added to the url

docbase: Current repository name

adminlogin: Documentum administrator's name (normally dmadmin)

adminticket: Ticket for an administrator's connection

login: Current user login

ticket: Ticket for current user

domain: Domain name

id: Id's list selected separated by a coma

- **bUseAdmin :**

Add parameters adminlogin and adminticket to the url

- To open a simple IE window, write :

```
launchIE('window','http://www.emc.com,'height=600  
,width=800,resizable=yes,status=yes,toolbar=yes  
,location=yes,directories=yes,menubar=yes')
```

- **sFeatures:**

For "modal" and "modeless":

dialogHeight: sHeight Sets the height of the dialog window.

dialogLeft: sXPos Sets the left position of the dialog window relative to the upper-left corner of the desktop.

dialogTop: sYPos Sets the top position of the dialog window relative to the upper-left corner of the desktop.

dialogWidth: sWidth Sets the width of the dialog window .

center: { yes | no | 1 | 0 | on | off } Specifies whether to center the dialog window within the desktop. The default is yes.

Example:

```
dialogHeight:400px;dialogWidth:400px;edge:raised:center:yes;  
help:no;resizable:true;status:no
```

For "window":

directories: yes/no display or not navigation buttons

location: yes/no display or not address bar

menubar: yes/no display or not menu bar (file, edition, ...)

resizable: yes/no define if window's size is modifiable or not

scrollbars: yes/no display or not scroll bar

status: yes/no display or not state bar

toolbar: yes/no display or not tool bar

width: width (in pixels) define width

height: height (in pixels) define height

Example: height=200,width=400,status=yes,toolbar=no

Appendix 3 : Actions in menus

launchApp(sPath, bIsBlocking, bUseAdmin, bNeedOtherSelection)

- Parameters beginning by a "s" are from type strings. They must be passed between single quotes
- Parameters beginning by a "b" are from type Boolean. Possible values are true or false
 - **sPath:** path of the executable of the application to be launched. Do not forget to double the \ in the path
 - **bIsBlocking:** Boolean indicating if the launched application will be blocked D2
 - **bUseAdmin:** Boolean indicating if an administrator's session has to be used
 - **bNeedOtherSelection:** Boolean allowing the opening of a document browser to set a second selection in the repository

Example of function :*launchApp('c:\\Documentum\\Checkout\\Laborantum\\Copy_Struct.exe',
true,false,true)*

For security reasons this function can only be used if the option **canUseAdminInLaunchApp** is enabled in D2-Client properties file.

Appendix 3 : Actions in menus

To launch a method, only once, on all selected Documentum objects.

launchMethod(sMethodName, bRefresh, sParameters, bLaunchAsync)

The list of object ids is in the parameter selectedIds

To launch a method on each selected documentum object:

function launchMethodOnEachIds(sMethodName, bRefresh, sParameters, bLaunchAsync)

Object id is in the parameter id

Parameters:

- Parameters beginning by a "s" are from type strings. They must be passed between single quotes
- Parameters beginning by a "b" are from type Boolean. Possible values are true or false
 - **sMethodName** : Method name
 - **bRefresh** : refresh D2-Client after the method
 - **sParameters** : parameter list (EX : parameter1=xxx¶meter2=yyy)
 - **bLaunchAsync** : Asynchronous launch.

Appendix 4 : List of reserved words

The following names should not be used into Object or Relation definition (Documentum Application Builder) unless you do not intend to use them into D2 property pages:

- abstract
- boolean
- break
- byte
- case
- catch
- char
- class
- const
- continue
- default
- delete
- do
- double
- else
- export
- extends
- false
- final
- finally
- float
- for
- function
- goto
- if
- implements
- import
- in
- instanceof
- int
- long
- native
- new
- null
- package
- private
- protected
- public
- return
- short
- static
- super
- switch
- synchronized
- this
- throw
- throws
- transient
- true
- try
- typeof
- var
- void
- while
- with

Appendix 5: Internal widgets of Browsing

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

Appendix 5: Internal widgets of Datas

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

Appendix 5: Internal widgets of 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 <i>Similar to D2 3.1 → Details Retention</i>
DetailsMarkupWidget	Shows retention mark-up applied to the selected document <i>Similar to D2 3.1 → Details Mark-up</i>

Appendix 5: Internal widgets of Search

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

Appendix 5: Internal widgets of 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

Appendix 6: Widgets Communication channels

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...)

Appendix 6: Widgets Communication channels

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		

Appendix 6: Widgets Communication channels

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)

Appendix 6: Widgets Communication channels

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

Appendix 6: Widgets Communication channels

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)

Appendix 7: Session timeout and cookie

- The duration of validity for the session cookie is controlled by the *uid.session.cookie.timeout* setting in :

X3/WEB-INF/classes/settings.properties

- The following value is the number of seconds that the "ctx_uid" session cookie is valid after it is created when a user closes a browser tab or window or refreshes or navigates away from a D2 page.
- The absence of this setting or giving it a value of zero will force all users to log in again in each of these cases and thus ensures compliance with the FDA industry's "21 CFR Part 11" certification.
- In the following case, the value set correspond to one minute:

uid.session.cookie.timeout = 60