opentext™

OpenText™ Documentum™ Content Management for Salesforce®

Installation Guide

This document explains how you can integrate Salesforce and OpenText Documentum CM for Salesforce.

EESADC250400-IGD-EN-01

OpenText™ Documentum™ Content Management for Salesforce®
Installation Guide

EESADC250400-IGD-EN-01
Rev.: 2025-Aug-29

This documentation has been created for OpenText™ Documentum™ Content Management for Salesforce® CE 25.4.
It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

Open Text Corporation

275 Frank Tompa Drive, Waterloo, Ontario, Canada, N2L 0A1

Tel: +1-519-888-7111
Toll Free Canada/USA: 1-800-499-6544 International: +800-4996-5440
Fax: +1-519-888-0677
Support: https://support.opentext.com
For more information, visit https://www.opentext.com

Table of Contents

Chapter 1

What is OpenText Documentum CM for Salesforce?

OpenText Documentum CM for Salesforce provides a 360-degree view for users to store and manage business critical documents and information. OpenText Documentum CM for Salesforce enriches the content management capabilities of OpenText™ Documentum™ Content Management bringing that information directly into Salesforce Sales and Service cloud and optimizing sales and customer service processes, creating a user experience like never before.

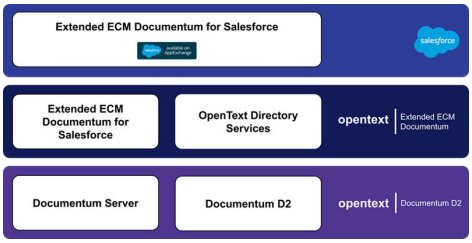


Figure 1-1: Solution components

The main systems for OpenText Documentum CM for Salesforce are OpenText Documentum CM and your Salesforce business application. OpenText Documentum CM and your business application are connected using the following components:

- OpenText Documentum CM for Salesforce components are installed in the business application system.
- OpenText Documentum CM for Salesforce components are installed on Content Server.
- Both systems are connected through Web Services.

Business workspaces

A *business workspace* in OpenText Documentum CM contains content that is relevant for a business object. From OpenText Documentum CM side, users can easily view the data of the enterprise application. From Salesforce, users can access OpenText Documentum CM items in the business workspace without leaving their application. To make full use of the OpenText Documentum CM functionality, business workspaces can be configured for OpenText Content Management.

Business relationships

OpenText Documentum CM for Salesforce provides tools to illustrate a relationship between business workspaces.

1.1 Related documentation

- Release Notes on OpenText My Support
- *OpenText Documentum Content Management for Salesforce - Configuration Guide (EESADC-CGD)*
- *OpenText Documentum Content Management for Salesforce - User Guide (EESADC-UGD)*

Part 1
Installing on Content Server

This part explains how you install the OpenText Content Management for Salesforce product on Content Server, how you define the basic settings, and how you import default configuration from the related Solution Accelerator.

Note: This part covers the details of OpenText Content Management for Salesforce installation on Content Server. The installation procedures of other OpenText products such as Archive Center, Directory Services (OTDS), or Content Server are not part of this guide. For detailed installation instructions, see the respective installation guides for the product, which are available on OpenText My Support.

Chapter 2

Installing on Content Server

2.1 Prerequisites

- Content Server, a Content Server database, and OpenText Directory Services (OTDS) are installed. For details, refer to *OpenText Content Management - Installation Guide (LLESCOR-IGD)*.
- As Salesforce is a cloud application, Content Server, Directory Services, and the associated web services *must* be accessible from outside the company firewall. In addition, the servers *must* be configured for HTTPS and use certificates from a Salesforce-approved Certificate Authority (CA). The list of approved CAs may be found at: https://developer.salesforce.com/page/Outbound_Messaging_SSL_CA_Certificates.
- Before starting the installation procedure, Lightning Experience *must* be enabled in Salesforce. For details, refer to "Setting up and activating Salesforce Lightning" on page 33.

2.2 Installing and configuring OpenText Content Management for Salesforce

Perform the following installation sequence:

1. Install OpenText Content Management as described in *OpenText Content Management - Installation Guide (LLESCOR-IGD)*. The OpenText Documentum CM for Salesforce module is installed as part of the Content Server installation.
2. Configure Salesforce as an external system on OpenText Content Management. See "Configuring Salesforce as an external system on Content Server" on page 11
3. Deploy web services. See "Deploying the web services" on page 15 .
4. Perform post installation tasks. See "Performing additional post-installation tasks" on page 17.
5. Install the base package. See "Installing the managed packages" on page 21.
6. Install the application or extension package. See "Installing the managed packages" on page 21.

2.3 Installing language packs on Content Server

This chapter describes how to install language packs on Content Server. The module installation packages and module support packages include the default language, which is English. Use the language packs to install other languages. For more information about available languages, see the Release Notes.

Language packages for support packages

If not stated otherwise, the language packs related to support packages are cumulative. They include merged language texts of the main version and of previous and current support packages.

To install a language pack:

1. Download the language packs from OpenText My Support. You can also obtain the language packs for support packages and other patches navigating through the **Patches** area.
2. Extract the files for the relevant modules in the Content Server root installation directory.
3. On the **OpenText Content Management Administration** page, go to **Base Settings - Language Configuration > Install Language Packs**.
4. On the **Install Language Packs** page, in the **Installable Content Server Language Packs** section, select **Install** for each language that you want to install, and then click **Install**.

   For more information about language packs, see **Help for this page** in the OpenText Content Management help.
5. Restart your servers when prompted.
6. Click **Continue**.

Chapter 3

Configuring Salesforce as an external system on Content Server

To connect a business application:

1. On the global menu, click **Enterprise > Enterprise Application Integration**, and then click **Connections to Business Applications (External Systems)**.
2. Click **Add Item > Business Application**.
3. Specify the parameters for your business application according to the list below.
4. Click **Add**.

Business Application ID

Define the logical name of the business application. The name must be unique and cannot be longer than 32 characters. This name is used when you select the business application in the business object type configuration. This name can be, for example, the name of the business application.

Connection Type

From the list, select **Documentum Salesforce Adapter** if Documentum is installed on Content Server.

> **Important**
>
> If you have selected `Default WebService Adapter` or `SFWebService` as Connection Type, you can choose between the authentication methods Basic and OAuth. For the other Connection Types, you can only use the Basic authentication.

Enabled

Select this option to enable the configuration.

> **Tip:** You can disable a configuration, for example if you created it only for testing and you do not want it to be used.

Comment

Enter a comment to give further information.

Base URL

Enter the common URL for accessing the business applications via a Web browser. You can use this base URL when configuring business object types on OpenText Content Management. The base URL is represented by the `$BaseURL$` variable for new business object types.

Classic mode base URL

You must use the Classic mode base URL, which is the one required by the Salesforce API. The Lightning mode base URL does not work here and cannot be used.

Application Server Endpoint

Specify the URL that will be called to obtain business object information.

The Endpoint URL should have the domain name.

Business application API version

Generally, the business application API version in the Base URL can be any currently supported by business application. In the example, the 61.0 portion can be replaced with any actual business application API version. If there is a breaking API change, see the Release Notes or it will be noted here.

Schema Version

Select the interface version.

Authentication Method

If you have selected `Default WebService Adapter` or `SFWebService` as Connection Type, you can choose between the authentication methods Basic and OAuth. For the other Connection Types, you can only use the Basic authentication.

Basic

This option is selected by default. The user must enter a username and a password.

- **User Name** – enter the user that is used to access business object type information in the business application.
- **Password** – specify the password of the defined user for the specified application server endpoint.

Note: With using basic authentication, OpenText strongly recommends that you use SSL at the web server. For information about importing certificates to the keystore, see "Importing root certificates for Secure Sockets Layer (SSL) connections" on page 17.

OAuth

Select this option to configure OAuth2 authentication. You must specify a token endpoint which is the URL of an authentication server. Authenticating against this authentication server with a client ID and a client secret, you obtain an access token which can then be used to authenticate against the application server.

- **OAuth Token Endpoint** – enter the URL of the authorization server that is used to acquire an access token.
- **OAuth Client ID** – enter the API Key created in the OAuth configuration.

- **OAuth Client Secret** – enter the private key you have generated in the OAuth configuration.
- **OAuth Request Type** – some SAP systems only support the basic authentication transport. Select the option suitable for your system:
  - **Basic** – select this option to send the OAuth parameter as basic authentication header.
  - **HTTP Body** – select this option to send the OAuth parameter within the request body.
- **OAuth Scope** – specify an OAuth Scope to restrict access to the application. OAuth 2.0 authentication supports Access Token Scopes to restrict access to certain subsets of the server resources. Note that this parameter is mandatory when using Azure Active Directory for authentication.

Test Connection

Click **Test** to perform a connection check to the specified business application. After a successful check, the message **Connection test was successful** is displayed next to the button. If the **Test** button is not active, you must first save the configuration. To save the configuration, click **Apply**.

Note: You can only test the connection after you have configured the SPI service in the business application accordingly and have saved the configuration.

Business Application Name

Enter localized names for the business application if required. For each available **Language**, enter the respective **Name**.

OpenText Documentum CM specific settings

On the **OpenText Documentum CM** tab, specify the parameters according to the list below:

OpenText Documentum CM Smart View URL

Provide the URL used to connect to OpenText Documentum CM Smart View. The general URL format is:

`http://<hostname>:<port>/D2-Smartview`

Repository

Provide the repository name which is used to store the documents. The repository name can be found in `dm_documentum_config.txt` file located in `C:\Documentum\dba`. Look for the `Name` attribute in the docbase details.

Resource Identifier

The resource id of the resource created for the OpenText Documentum CM server in OTDS.

Test Connection

Click **Test** to check the connection to OpenText Documentum CM Smart View with the specified repository.

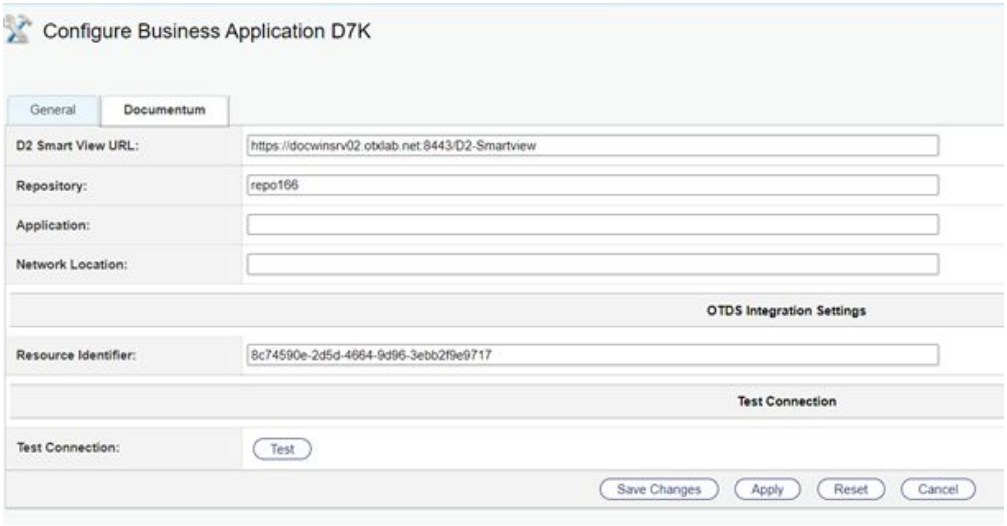


Figure 3-1: OpenText Documentum CM tab

Chapter 4

Deploying the web services

You must complete the following procedures to use OpenText Content Management with Salesforce:

- Deploy Content Management Web Services into the application server. See *OpenText Content Management - Installation Guide (LLESCOR-IGD)*.
- Deploy Content Management Content Web Services. See *OpenText Content Management - Installation Guide (LLESCOR-IGD)*.
- Configure host and port for Content Server in Tomcat. See *OpenText Content Management - Installation Guide (LLESCOR-IGD)*.

Chapter 5

Performing additional post-installation tasks

5.1 Importing root certificates for Secure Sockets Layer (SSL) connections

To secure communication between Content Server and the business application, OpenText strongly recommends that you use the Secure Sockets Layer (SSL) protocol. Install the certificates on the business application, the Tomcat server running the OpenText Content Management Web Services, and in the OpenText Content Management keystore. The OpenText Content Management keystore is located in *<Opentext home>*`/config/ecmlink-spi.cacerts`. It contains the common root certificates known from Java runtime.

Notes

- If you want to use self-signed certificates, you must import them into the following keystores:
  - OpenText Content Management keystore (*<Opentext home>*`\config\ecmlink-spi.cacerts`)
  - Content Server keystore (*<Opentext home>*`\jre\lib\security\cacerts`)
  - JRE keystore for the Tomcat server running the OpenText Content Management Web Services

  For more information about keystores in Tomcat, see the Tomcat documentation (http://tomcat.apache.org/tomcat-8.5-doc/ssl-howto.html).
- The certificate should be in Base64 format.

The following procedure describes how to import a certificate to the OpenText Content Management keystore `ecmlink-spi.cacerts`.

To import a certificate:

1. Open a command prompt window.
2. To list the certificates, run the following command:

   ```
   keytool -list -keystore <Opentext home>\config\ecmlink-spi.cacerts -storepass
   changeit
   ```

3. The key store password is `changeit`. To change the password, enter:

   ```
   keytool -storepasswd changeit -new <KeystorePassphrase> -keystore <Opentext home>
   \config\ecmlink-spi.cacerts
   ```

4. To add a certificate, run the following command:

```
<Java home>\bin\keytool -import
                      -alias <CertificateAlias>
                      -file <CertificateFile>
                      -keystore <Keystore>
                      -storepass <KeystorePassphrase>
```

Example:

```
C:\OPENTEXT\jre\bin\keytool
                         -import
                         -alias mycertificate
                         -file c:\temp\mycertificate.cer
                         -keystore c:\opentext\config\ecmlink-spi.cacerts
                         -storepass mypassword
```

5.2 Verifying the new package notification settings

When you install a 24.2 or later enabler, the **xECM_Custom_Notification** API is added in **Setup** > **Custom Notification Settings** through the post install scripts. This enables you to receive a notification when a new version of the enabler is available.

To ensure that you don't miss these notifications, verify if the **xECM_Custom_Notification** API is added to the **Custom Notification Settings** and also ensure that the Salesforce AppExchange URL (`https://appexchange.salesforce.com`) is added in **Org Setup** > **Remote Site Settings**.

Part 2
Installing on Salesforce

This part explains how you install the managed packages in Salesforce, how you define the basic settings, and how you import an out-of-the-box configuration from the related Solution Accelerator.

Chapter 6

Installing on Salesforce

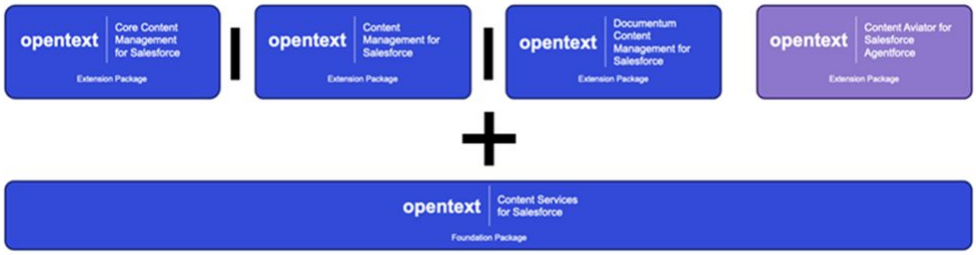
6.1 Release timeline

You can install and update all versions via System Center. For more information on packages, see the respective Release Notes.

Tip: Starting with version 22.4, the Enabler package was renamed from **OpenText Content Management for Salesforce** to **Content Services for Salesforce**. This base service package is the basis for repository specific application packages.

6.2 Installing the managed packages

In Salesforce, you first must install a base service package that contains the Enabler part of Content Services for Salesforce, and then an application package for the repository that you use as back end. Additionally, if you want OpenText Aviator integration with Salesforce Agentforce, then you must install the Aviator extension package too. The packages are provided on Salesforce.



These are the supported repositories and associated extension packages:

- **Core Content**: OpenText Core Content Management for Salesforce
- **Content Server**: OpenText Content Management for Salesforce
- **Documentum**: OpenText Documentum CM for Salesforce

To install the managed packages in Salesforce:

1. Sign in to your Salesforce organization as administrator.
2. On Salesforce AppExchange download and install the packages one at a time in the following order. You must install the base service package first to avoid dependency installation issues.
    a. **OpenText Content Services for Salesforce** (the base package)

b. **OpenText Content Aviator for Salesforce**

c. **OpenText Documentum CM for Salesforce** (the Documentum application package)

Note: For the URLs to use to install the managed packages, see the respective Release Notes.

3. When prompted, select **Install for Admins Only** (default) and click **Install**.
4. When installation is completed, click **Done**.

6.3 Importing translation files

The translation files are delivered in the `ExtendedECMforSalesforceTranslations.zip` file. The file contains language files for all supported languages. You can import all files at once or one file at a time as required.

To import language files:

1. Make sure that the language that you want to import is enabled. If not, enable it.
   a. Go to **Setup > Company Settings > Language Settings**.
   b. For the relevant languages, select the **Enable end-user languages** check box.
   c. Add the relevant languages from the **Available Languages** list to the **Displayed Languages**.
   d. Click **Save**.
2. Make sure that the language that you want to import is activated in the org. If not, activate it and assign it to the user who imports the package.
   a. Go to **Setup > User Interface > Translation Workbench > Translation Language Settings** and click **Add**.
   b. Select the language in the **Language** list. Already activated languages are not available in the list.

      Make sure that the **Activate** check box is selected.
   c. Search for the relevant users and move the respective language from the **Available** list to the **Selected** list.
   d. Click **Save**.
3. Go to **Setup > Translation Workbench > Import**.
4. Click **Browse** and navigate to the location where you have copied the translation files.
5. Select the language file that you want to import, for example `Source_Dutch.stf` and click **Import**.

   The file is imported.

Tip: In case of errors, check the log file.

6.4 Setting up permissions

There are two permission sets that you must assign to the respective users:

- **OpenText Content Services Admin Permission Set** for administrators

  Enables administrators to view apps, tabs, and objects of the OpenText administration screen.

- **OpenText Content Services Workspace Permission Set** for all non-administrative users and **Community users**.

  Enables users to work with OpenText workspaces.

- **OpenText Content Services Solution Accelerator Permission Set**

  Enables users to see OpenText Content Management widgets.

- **OpenText Content Services Aviator Permission Set**

  Enables users to work with Agentforce - Aviator integrations.

  Note: The **OpenText Content Services Aviator Permission Set** will be available only after you install the OpenText Content Aviator for Salesforce extension package.

To assign permission sets:

1. On the Salesforce page, click **Setup**.
2. Navigate to **Administration > Users > Permission Sets**, and click **OpenText Content Services Admin Permission Set**.
3. On the **Permission Set** page, click **Manage Assignments**.
4. On the **Assigned Users** page, click **Add Assignments**.
5. On the **Assign Users** page, select all relevant users that need administration permissions and click **Assign**.
6. On the **Assignment Summary** page, review the settings and click **Done**.
7. Repeat the steps to assign the non-administrative users to the **OpenText Content Services Workspace Permission Set** and optionally also the **OpenText Content Services Solution Accelerator Permission Set**.

Adding OpenText Content Management administrators later

If OpenText Content Management for Salesforce is installed only for administrators and you want to assign users who are not Salesforce administrators as OpenText Content Management administrators later, do one of the following to grant these users access to OpenText Content Management for Salesforce.

To grant access to OpenText Content Management for Salesforce to a profile:

1. On the Salesforce page, click **Setup**.
2. Navigate to **Administration > Users > Profiles**, and click the desired profile.
3. On the **Profile** page, click **Assigned Apps** or **Custom App Settings**, depending on your Org version.
4. Select the **Visible** check box for the **OpenText Content Management** application.

To grant access to OpenText Content Management for Salesforce to an individual user:

1. On the Salesforce page, click **Setup**.
2. Navigate to **Administration > Users > Permission Sets**, and for the **OpenText Content Services Admin Permission Set** click **Clone**.
3. On the **Permission Set** page, edit the new permission set, and then click **Save**.
4. Click the new permission set, select **Assigned Apps**. On the **Assigned Apps** page, click **Edit**.
5. From the **Available Apps** list, select OpenText Content Management and click **Add** to **Enabled Apps**. Click **Save**.
6. On the **Permission Set** page, click **Manage Assignments**.
7. On the **Assigned Users** page, click **Add Assignments**.
8. On the **Assigned Users** page, select all relevant users that need administration permissions. Click **Next** and verify the selected users. Click **Assign**.

6.5 Adding remote sites

You must add every `protocol://host:port` entry that is specified in the system configuration to Salesforce as a valid remote site, for example `https://sfdcdemo01.opentext.com:8443`. Salesforce will block requests to any site not authorized as a valid remote site.

Note: Any difference in protocol, host, or port requires a separate entry. For example, the entry `http://myhost.mycompany.com` will not work for `https:myhost.mycompany.com` or `http://myhost.mycompany.com:8080`. Each of these URLs would need a separate entry.

To add remote sites:

1. In the Salesforce operations, click **Setup**.
2. In the left sidebar, navigate to **Security > Remote Site Settings** and click **New Remote Site**.

3. On the **Remote Site Edit** page, enter name and URL and select the **Active** check box.
4. Click **Save**.
5. Repeat the steps for every remote site that you configured in the system configuration.

Chapter 7

Importing Salesforce configuration from the CRM Solution Accelerator configuration

The OpenText Content Management for Salesforce Solution Accelerator provides an out-of-the box configuration for Salesforce. Alternatively, you can also configure manually.

The Solution Accelerator is a reference implementation for the Salesforce integration. It consists of a predefined set of business objects that you import into Salesforce. You can deploy the Solution Accelerator to see an example of how the integration works, or as a starting point for your own configuration.

For the URL to download the solution accelerator ZIP file, see the Release Notes.

This ZIP file contains the following files:

`SalesforceFiles.zip`
Contains the `sa_configuration_crm_<version>` solution accelerator file to import into Salesforce.

`OpenText Documentum CM for Salesforce CRM Solution Accelerator <version>`
A URL to the Solution Accelerator import in the Salesforce AppExchange.

The Solution Accelerator

You can enhance your Salesforce, Service, Sales, and Marketing Cloud installations with OpenText Content Management for Salesforce (OpenText Content Management) functionality by implementing business workspaces and business relationships for Salesforce objects. This feature allows you to access and maintain documents and other unstructured content related to your Salesforce system in a repository workspace, easily accessible together with key related metadata from Salesforce on your screen. As a result, you get state-of-the art document management, collaboration, records management capabilities and much more, tightly integrated with Salesforce Clouds while at the same time providing enterprise access to this content via productivity tools like Microsoft Windows® and Microsoft® Office.

This Solution Accelerator illustrates one of many possible implementations that use business workspaces and business relationships to manage documents in Salesforce's Service, Sales, and Marketing Cloud applications.

This Solution Accelerator includes the following topics:

- Installation and reference configuration of OpenText Content Management for Salesforce for the following Salesforce Standard objects: Account, Campaign, Case, Contract, Lead, Opportunity, Order, Product, and Quote.

- Sample implementation of OpenText Content Management business workspaces and business relationships.

OpenText wants to improve continuously our Solution Accelerator and is very interested in your feedback. Please use the OTDN forum linked to each blueprint for giving OpenText and the whole OpenText Content Management community your feedback.

Important

Solution accelerators are provided "as is" to customers and partners at no additional cost. A solution accelerator is not part of any product and is excluded from product maintenance and support. OpenText asks for your understanding that Customer Support is unable to answer questions related to solution accelerators.

7.1 Enabling relevant objects

Before installing the Solution Accelerator, enable **Quotes**, **Quantity Schedules**, and **Revenue Schedules**.

To enable the objects:

1. In the Salesforce operations, click **Setup**.
2. In the left sidebar, navigate to **Feature Settings > Sales > Quotes > Quotes Settings**.
3. On the **Quote Settings** page, select **Enable Quotes**.
4. Click **Save**.
5. In the left sidebar, navigate to **Setup > Feature Settings > Sales > Products > Product Schedules Settings**.
6. Select the **Scheduling Enabled** check boxes for both **Quantity Schedules** and **Revenue Schedules**.

7.2 Installing the Solution Accelerator

The Solution Accelerator is an unmanaged package.

To install the Solution Accelerator:

1. Log on to your Salesforce organization as an Administrator user.
2. Copy the `OpenText Documentum CM for Salesforce CRM Solution Accelerator <version>` link that is provided in the ZIP file to a browser window, and open the link.
3. On the next screen, select **Do not install** and **Install for Admins Only** (default) and click **Install**.

4. When installation is completed, click **Done**.

7.3 Importing the configuration

You can use an exported configuration file to import the configuration to your system. The `sa_configuration_crm_<version>` configuration file contains the following for each supported Salesforce object:

- Triggers on the objects
- VisualForce and Lightning pages to display the business workspace widget
- Buttons for viewing each business workspace in a 'light box'
- OpenText sample page layouts containing the business workspace widget and light box button
- Property provider and related business workspaces configuration records for the sample configuration.

Alternatively, you can configure manually. For more information, see Section 4 "Manual configuration in Salesforce" in *OpenText Documentum Content Management for Salesforce - Configuration Guide (EESADC-CGD)*.

To import the configuration:

1. Copy the `sa_configuration_crm_<version>` file to your local client.
2. From the Salesforce App Launcher, select **OpenText Content Management** (classic UI) or **Content Services by OpenText** (Lightning UI).
3. Click the **Administration** tab.
4. In the navigation tree on the left, click **Import/Export**.
5. In the **Configuration Export/Import** section, click **Import XML Configuration**.
6. Browse for the configuration, select the import file, and click **Load File**.
7. In the **Import Options** area, choose from the following options:
   - To import the system configuration: In the **System Configurations** area, select the **Include System Configuration** check box. This is relevant if you exported the configuration from another system with the system configuration included and want to import it to the current system.
   - To import only specific Salesforce business objects: In the **Business Objects** area, clear the check boxes for business objects that you do not want to import. By default, all business objects are selected.
8. Click **Import**.

7.4 Reviewing business object types

After the import, review the business object types. The following business object types are imported:

- Account
- Campaign
- Case
- Contract
- Lead
- Opportunity
- Order
- Product
- Quote

To review the imported business object types:

1. From the **App Menu**, select **Content Services by OpenText**.
2. Click the **Business Object Types** tab.
3. Check that the imported business objects are listed correctly.

7.5 Assigning classic page layouts

Refer to the Release Notes for further information regarding support of classic UI.

7.6 Assigning lightning page layouts

For each of the business object types, assign a page layout to the relevant profiles.

To assign the lightning page layout to an object:

1. In the Salesforce operations, click **Setup**.
2. In the search field, type **Object Manager** and select the object that you want to configure, for example **Account**.
3. Click **Page Layouts** and then click **Page Layout Assignment**.
4. Click **Edit assignment** and select the profile that you want to assign the layout.
5. Assign the respective OpenText Lightning layout, for example **Account (OpenText Lightning) Layout**.

To assign the lightning page as org default:

1. In the Salesforce operations, click **User Interface > Lightning App Builder**.
2. For the appropriate lightning page, for example **OpenText Account Lightning Page**, click **Edit**.

3. Click **Activation**.
4. Click **Assign as Org Default**.
5. Click **Close**, and then click **Save**.

Chapter 8

Configuring the Solution Accelerator

In this chapter, different topics are specified that are important for using the Solution Accelerator. The following sections describe what needs to be configured as well as what components are needed from the Solution Accelerator.

8.1 Setting up and activating Salesforce Lightning

To set up Lightning, please refer to Salesforce documentation on enabling Lightning and MyDomain for your organization's requirements. There may be several considerations before you choose a specific path or configuration. Below are direct links to the Salesforce documentation to help:

- Set Up a My Domain Name (https://help.salesforce.com/articleView?id=domain_name_setup.htm&type=0)
- Turn on Lightning Experience for Your Org (https://help.salesforce.com/articleView?id=lex_enable_turn_on.htm&type=0)
- Navigate Lightning Experience and Setup trailhead (https://trailhead.salesforce.com/en/modules/lex_migration_whatsnew/units/lex_migration_whatsnew_nav_setup)

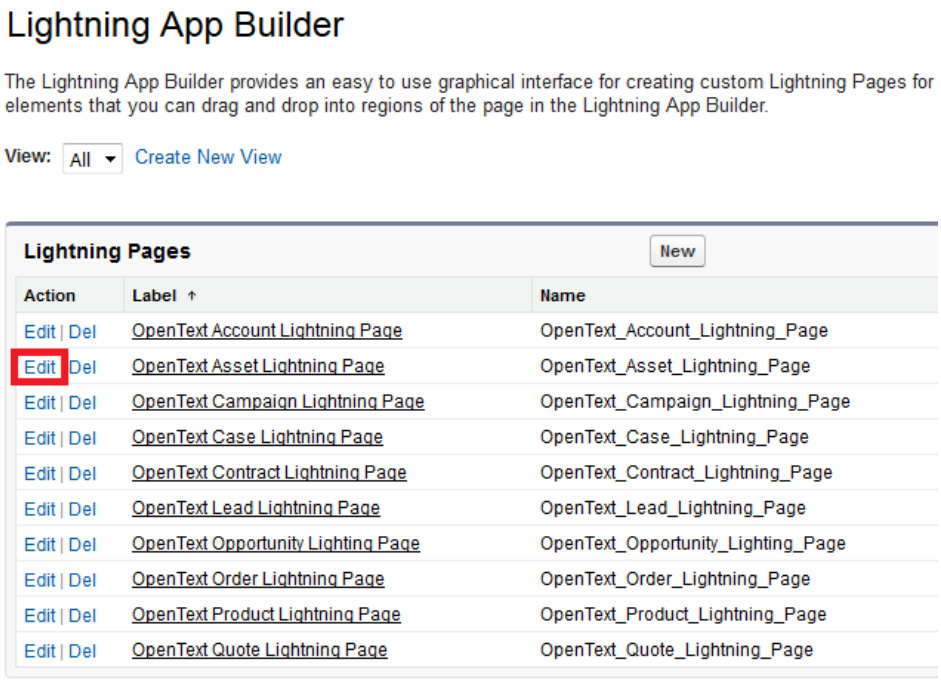
Note: Always check for the latest versions of OpenText Content Management for Salesforce Enabler and Solution Accelerator. For Salesforce's Lightning experience, OpenText Content Management for Salesforce Enabler version 1.94 or higher and Solution Accelerator 1.30 or higher is required.

As part of the setup, this version requires a domain to be specified as part of the configuration to properly install the Enabler and Solution Accelerator.

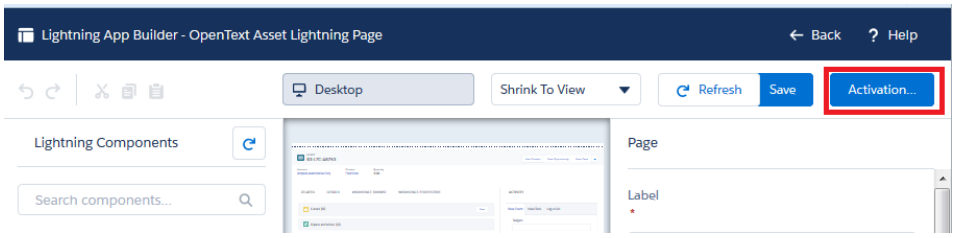
You must activate Lightning for each OpenText Lightning page.

To activate an OpenText Lightning page:

1. In the **Lightning App Builder** page, click **Edit** on any of the pages with OpenText <Object> Lighting Page.

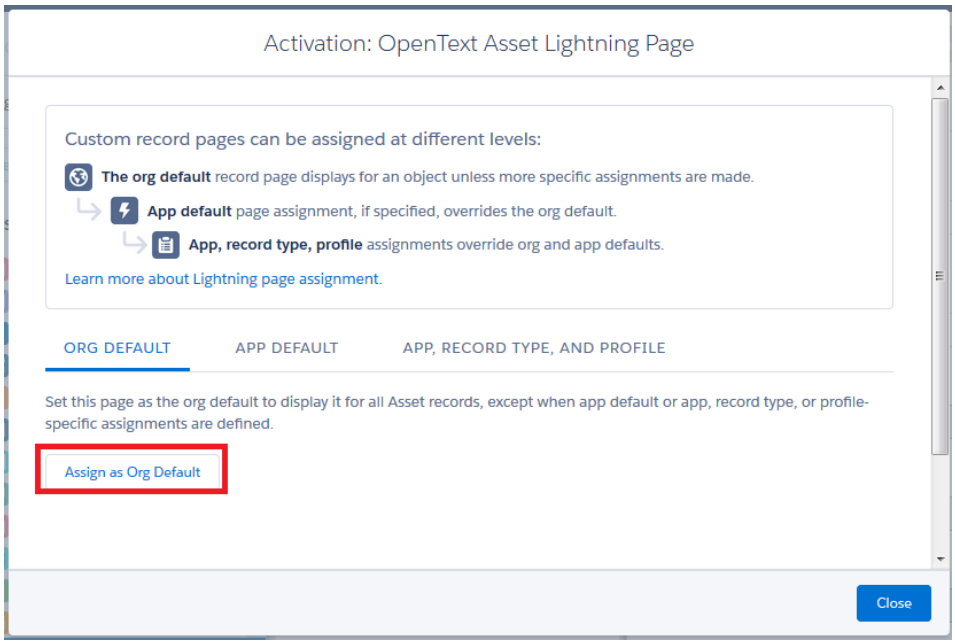


2. Click **Activation**.

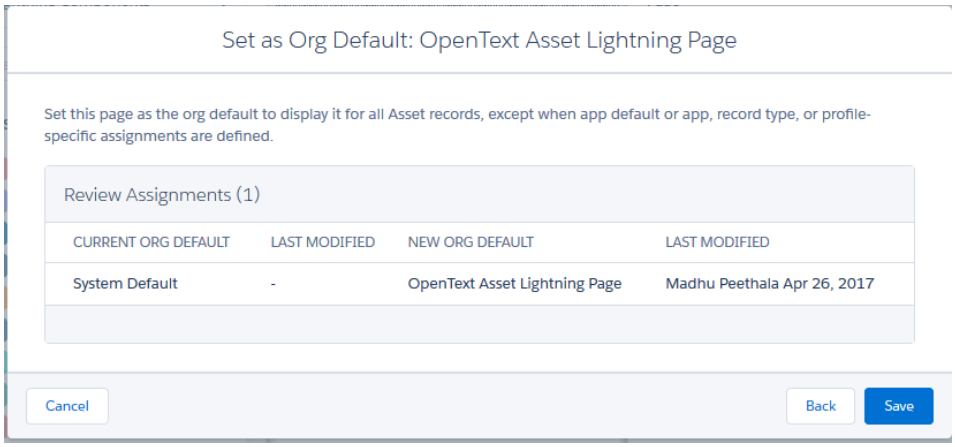


You may be shown the **No Data for this Object** dialog. Make appropriate selection, and click **OK**.

3. Click **Assign as Org Default**.

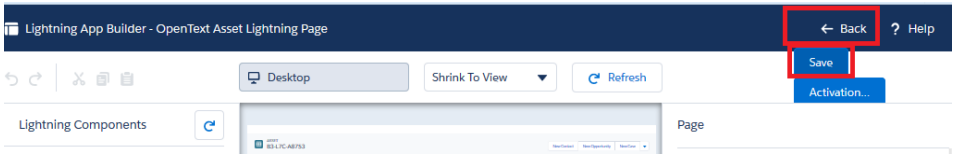


4. Click **Save**.



5. Click **Save** and then **Back** to complete the activation.

Note: You must activate each OpenText Lightning page.



6. Assign these pages to the appropriate user profiles.

8.2 Using trigger definitions

The Solution Accelerator is a specialized tool set designed to enhance the adoption and effectiveness of Content Services for Salesforce within organizations. It includes sample configurations, language packs, trigger classes, and other assets to swiftly tailor the product to specific business requirements.

OpenText recommends that you install the Solution Accelerator on a standalone Test or Sandbox system to review the sample configuration and incorporate relevant components into your development system.

The trigger classes serve as example code, and it is advised to integrate this sample code into your own custom trigger classes and embed them within your business logic. As a best practice, OpenText suggests that you encapsulate the OpenText trigger functionality within your business logic and trigger it only when a data field changes in Salesforce and synchronized as an attribute of a business workspace.

The following list outlines the components required from the Solution Accelerator based on the specific business scenario:

Table 8-1: Triggers

Salesforce Name	Salesforce Setup Location	Salesforce Object	Salesforce Sales & Service Cloud	Salesforce Financial Service Cloud	Notes
Global					
XECMFacade	Apex Classes		x		Façade and Test Suite classes are required for all scenarios.
XECMFacade FSC				x	
xecmCRMTriggersTestSuite			x		
xecmFSCTriggersTestSuite				x	
Workspace					
xecmAccount Trigger (1)	Apex Trigger	Account	x	x	
xecmCampaignTrigger		Campaign	x	x	
xecmCaseTrigger (1)		Case	x	x	
xecmContract Trigger		Contract	x	x	

Salesforce Name	Salesforce Setup Location	Salesforce Object	Salesforce Sales & Service Cloud	Salesforce Financial Service Cloud	Notes
xecmLeadTrigger (1)		Lead	x	x	
xecmOpportunityTrigger		Opportunity	x	x	
xecmOrderTrigger		Order	x	x	
xecmProductTrigger		Product2	x	x	
xecmQuoteTrigger		Quote	x	x	
xecmClaimTrigger		Claim		x	
xecmPolicyTrigger		Insurance Policy		x	
Native Attachment Sync					
xecmAttachmentTrigger	Apex Trigger		x	x	
xecmContentDocumentLinkTrigger			x	x	
xecmContentDocumentTrigger			x	x	
xecmContentVersionTrigger			x	x	
xecmNoteTrigger			x	x	
Chatter/Pulse Sync					
xecmFeedCommentTrigger	Apex Trigger		x	x	
xecmFeedItemTrigger			x	x	

(1) – Trigger supports the standard Salesforce Object Merge functionality in combination with OpenText Content Management or Core Content.

Part 3
Testing the installation

Chapter 9

Testing the installation

You can make quick verification of the Solution Accelerator installation and configuration using the procedures in the following sections.

Note: These procedures often refer to "the configured Salesforce objects" or some equivalent phrase. These refer to the Salesforceobjects configured into the product. The Solution Accelerator comes out of the box configured for the following Salesforce objects:

- Account
- Campaign
- Case
- Contract
- Lead
- Opportunity
- Order
- Product
- Quote

Depending on your particular configuration you may have a different set of objects; when performing the tests use the ones configured into your installation.

9.1 Running the reports

The product includes two reports: a configuration report to list the current configuration of the system and a diagnostic report to check for configuration errors. You can either run the report to display it on the screen or download it.

Configuration report

The configuration report is helpful in showing all the system's configurations in one view. It can also be helpful in identifying misconfigurations, detailing mappings, and self-documenting the integration.

Diagnostic report

The diagnostic report validates the extension package and system's configurations, including the machine access to all required services. If any configurations fail, the recommendations provided are helpful in identifying and resolving issues. Once issues are resolved, rerun the report to verify the corrections.

Note: If you are unable to open or work in an Org, OpenText recommends that you run a diagnostic report to validate if the feature is enabled and supported by your extension package. It also verifies if the users are synchronized.

To access the reports:

1. Log on to Salesforce as a user assigned the **OpenText Content Services Admin Permission Set**.
2. From the application list, select **Content Services by OpenText**.
3. Click the **Administration** tab.
4. In the navigation tree on the left, click **Reports**.
5. Click **Diagnostic Report** or **Configuration Report** to run and display the respective report.
6. Optional Click **Download** to download the report in .CSV format.

9.2 Initial configuration testing

The initial Salesforce configuration testing is to verify the configuration is capable of continuing with the rest of the tests.

9.2.1 Testing the page layouts

Testing the page layouts ensures that users who need to access Content Server workspaces can actually do so.

To verify the page layouts:

1. Identify the classes of users which should be able to access Content Server. These could be **System Administrator**, **Standard User** and **Marketing User**, for example.
2. Pick a representative user from each class.
3. For each user, log into Salesforce and go to the **Detail** page for each object.
4. On each detail page verify the **Workspace** button and the **OpenText Workspace** section appear on the page.

9.2.2 Troubleshooting page layouts

If the appropriate components do not appear on the page for an object or user you should check for the following:

1. Verify the correct page layout for the object has been assigned to the appropriate classes of users.
2. Verify the **Workspace** button and the **OpenText Workspace** section have been added to the page layouts.

9.3 Testing business workspace and sidebar widgets

A business workspace is a document management area in Content Server that holds all information related to a business object, for example documents, images and other objects, metadata, and workflows. It also provides Salesforce data and relationships to other Salesforce business objects.

9.3.1 Testing workspace creation

OpenText business workspaces are created in response to modifications of Salesforce records. When a Salesforce business object (record) is created or modified the business object's properties and relationships are sent to the repository where the corresponding workspace is created or updated and the properties are placed into category attributes.

To test workspace creation:

1. For each configured business object, for example Account, click **Edit** and then **Save**. You do not actually need to make changes to the record.
2. Verify the workspace appears in the **OpenText Workspace** section of the objects' detail pages. You may need to wait a few seconds and then refresh the page to give the background processing time to complete.
3. Click **Workspace** and verify the workspace appears in the light box display.
4. Display the categories for the workspace and verify the individual attributes are correctly populated with data from the Salesforce record.

9.3.2 Troubleshooting workspace creation

Business workspaces are not created

This is typically the most difficult scenario to troubleshoot due to the many conditions which can cause it. The first step should be to inspect the Salesforce logs:

To inspect the Salesforce logs:

1. Open the **Developer Console: Setup > Develop > Apex Classes > Developer Console**.
2. Close the initial dialog.
3. Edit and save one of the objects listed in the previous sections.

You should see several entries in the Logs tab of the developer console. If any of them have a `Failure` status those are the ones to start with. If no log has a `Failure` status, examine the log whose Operation is `FutureHandler`.

It is often easier to open the log in Raw format and copy the contents to a text editor. Inspect it for errors paying particular attention to records listed as `CALLOUT_REQUEST` and especially `CALLOUT_RESPONSE`. Consider the following possibilities:

- If there is no log with an Operation of `FutureHandler`, it is possible either that the triggers did not get placed on the Salesforce objects or that you are editing something other than the intended object.
- If callouts are timing out, it is possible the web service URLs are incorrect or that a firewall is blocking the requests from Salesforce.
- If you see Authentication errors in the response from Directory Services, check the OpenText Content Management user name and password.
- Verify that the external system ID is the same in both (Content Repository and Salesforce.
- Verify that the business object name is spelled identically in both Content Repository and Salesforce.
- If messages are returned stating the node could not be created, verify the Content Server user has permission to create workspaces, that the Enterprise Workspace folders are created with the correct names, and that the category attributes are long enough to hold the data from Salesforce.

Properties are not populated

This can be caused by several conditions. Check the following:

- Verify that there is data in the Salesforce record for that property. Empty properties are not displayed in the widget.
- Verify that the property name is spelled identically in both (Content Repository and Salesforce.
- Verify that the property has been mapped to the correct category and attribute.

9.4 Testing business relationships

Business relationships are based on existing relationships between Salesforce business objects (records). Before you can test business relationships you need to identify related Salesforce objects. For example, to test the relationship between **Opportunities** and **Products** you need to find an opportunity record and identify the product records to which it is related.

9.4.1 Creating business relationships

To create the business relationships in Content Server:

1. For each of the relationships identify Salesforce records on each end of the relationship.
2. Edit and save each record to ensure the workspaces have been created in Content Server.
3. Inspect the workspaces either through the light box display or directly in Content Server to verify the related business objects appear.

9.4.2 Troubleshooting business relationships

Troubleshooting business relationships is usually straight-forward. If they are not working consider the following possibilities:

- Verify that the business objects are actually related in Salesforce.
- Verify that the business relationships have been configured in Salesforce.
- Verify that the Related Items widget has been configured in the business object's Workspace Type in Content Server.
- Check the Salesforce log for any internal errors traversing the internal Salesforce object relations.

9.5 Testing the OpenText Content Management “jump back” feature

9.5.1 Testing the “jump back” feature

To test the “jump back” feature:

1. For each configured business object open a workspace for the object. You should see the object's link in the Workspace Reference widget.
2. Click the link; it should take you to the Salesforce page for that object.

9.5.2 Troubleshooting “jump back” feature

Consider the following when troubleshooting the “jump back” feature:

- If the Workspace Reference widget does not appear at all, verify it has been configured in the Workspace Type for the business object.
- Verify that the correct Display URL has been configured in the Business Object Type for the business object.

Part 4
Upgrading

Chapter 10

Upgrading versions

Notes

- Before you upgrade, you must install an application package for the repository that you use. These are the supported repositories and associated application packages:
  - **Content Server**: OpenText Content Management for Salesforce
  - **Core Content**: OpenText Core Content Management for Salesforce
  - **Documentum**: OpenText Documentum CM for Salesforce

  The Release Notes contain more information of the latest application package versions available that are compatible with your enabler version.
- When you upgrade the application package from 24.2 to any upper version, make sure to select the **Skip triggers execution and validation rules on asset files** check box in **Setup > General Settings**.

After an upgrade from a previous version of the OpenText Content Management for Salesforce application package, follow the procedures in the following sections to make sure it is working properly.

10.1 Checking related lists in Salesforce layouts

Make sure that for each **Business Object Type** defined in your system, you have the following in the **Related Lists** section:

- Business Object Properties
- Business Property Paths
- Business Property Groups
- Business Object Document Types
- Role Synchronization Entities

These are required for proper functioning. Any related lists that may exist from previous versions are not needed and can be removed.

10.2 Checking list values in Log Configuration object

Ensure the **Log Module** field in the **Log Configuration** object has the latest picklist values.

To add missing values:

1. From the Salesforce menu, select **Setup**. and enter the **Object Manager**.
2. Click **Log Configuration**, and go to the **Fields & Relationships** section.
3. Click **Log Module**, and navigate to the **Values** section.
4. Ensure the following values are in the list:

   All, Administration, BOType Resolver, Business Relationship, Dynamic SOQL, Inbound Calls, Outbound Calls, Native Attachments, Platform Cache, Property Provider, User Synchronization, Workspace Access, and Workspace Integration, and Scheduler.
5. Click **New** to add any missing values. Make sure the values are entered exactly as outlined and note spaces and letter case.

10.3 Checking list values in Schedule object

Ensure the **Schedule Type** field in the **Schedule** object has the latest picklist values.

To add missing values:

1. From the Salesforce menu, select **Setup**. and enter the **Object Manager**.
2. Click **Schedule**, and go to the **Fields & Relationships** section.
3. Click **Schedule Type**, and navigate to the **Values** section.
4. Ensure the following values are in the list:

   Workspace, Logging, NativeAttachment, GroupSynchronization, UserNameMappingSynchronization, and GroupCacheSynchronization.
5. Click **New** to add any missing values. Make sure the values are entered exactly as outlined and note spaces and letter case.

10.4 Checking list values in Content Document Node object

Ensure the **Content Type** field in the **Content Document Node** object has the latest picklist values.

To add missing values:

1. From the Salesforce menu, select **Setup**. and enter the **Object Manager**.
2. Click **Content Document Node**, and go to the **Fields & Relationships** section.
3. Click **Content Type**, and navigate to the **Values** section.
4. Ensure the following values are in the list:

   ATTACHMENT, FILE, and LINK.
5. Click **New** to add any missing values. Make sure the values are entered exactly as outlined and note spaces and letter case.

10.5 Checking list values in Business Process Schedule object

Ensure the **Delay Units** field in the **Business Process Schedule** object has the latest picklist values.

To add missing values:

1. From the Salesforce menu, select **Setup**. and enter the **Object Manager**.
2. Click **Business Process Schedule**, and go to the **Fields & Relationships** section.
3. Click **Delay Units**, and navigate to the **Values** section.
4. Ensure the following values are in the list:

   MINUTE, HOUR, and DAY.
5. Click **New** to add any missing values. Make sure the values are entered exactly as outlined and note spaces and letter case.

10.6 Changes to app names in App Manager

Follow this procedure while upgrading enabler version from 24.2 to any latest version.

Note: App names cannot be changed by default in Salesforce environment by upgrading it.

To change app names in App Manager:

1. Login to **Salesforce** as an **Admin user**.
2. Navigate to **Setup**, then in **Quick Find** search for **App Manager**.
3. On **Lightning Experience App Manager** page, click **Edit** on **OpenText Content Services** tab, where app type is **Lightning**.
    a. In **App Details and Branding** section, change **App Name** to **Content Services by OpenText**.
    b. Change **Description** to "OpenText Content Services for Salesforce streamlines the integration between Salesforce and OpenText, establishing a seamless connection between Salesforce and OpenText's Content Services platform, whether hosted in the cloud or on-premises."
    c. Click **Save**.
4. Click **Edit** on **OpenText Content Services** tab where app type is **Classic**.
    a. Change **App Name** to **Content Services by OpenText**.
    b. Change **Description** to "OpenText Content Services for Salesforce streamlines the integration between Salesforce and OpenText, establishing a seamless connection between Salesforce and OpenText's Content Services platform, whether hosted in the cloud or on-premises."
    c. In **Choose the Image Source for the Custom App Logo** section, click the **Insert an Image** button.
    d. Click **File Location** drop down and select **OpenText Logo**. Click the selected logo.
    e. Click **Save**.

10.7 Changes to cross-application workspaces functionality

The cross-application feature has been expanded to support cross-application workspaces from multiple external systems. Each Business Object Type may be configured for a different external system.

The following conditions must be met to create a reference to a cross-application workspace:

1. The global **Cross Application Workspace Enabled** check box must be selected on the **System Configuration** tab.
2. The **Cross Application Workspace** area of the **Business Object Type** configuration must have an **External System ID**, **Business Object Type**, and the name of the field holding the external Business object ID.

Previously, if these conditions were not met, a standalone workspace was created rather than a cross-application workspace; other than as noted below, OpenText remains compatible with this behavior. Note that *partial* configurations are not considered errors, but the diagnostic report will flag them as warnings, and the product will continue to create standalone workspaces.

If there is an external Business Object ID in the record and the workspace exists in the repository, the workspace will be updated with the information from Salesforce.

If either there is no Business Object ID in the record or the workspace does not exist in the repository, behavior is controlled by the **Create Workspace if Missing** check box. If the check box is selected, a standalone workspace will be created; this is the historical behavior.

If the check box is cleared, the record will be placed in the error queue. In the case of a missing Business Object ID, the record must be resubmitted manually once the Business Object ID is added to the record. In the case of a missing workspace, the record will automatically be periodically resubmitted as the products waits for the cross-application workspace to be created. This prevents from creating a standalone workspace, which will be orphaned when the cross-application workspace is finally created.

The upgrade process should set the cross-application configuration appropriately to preserve the existing behavior. However, to avoid confusion the administrator should review the Business Object Type configuration to ensure the following:

1. Either all the external system ID, external Business Object Type, and external Business Object ID field name fields are filled out or none of them are.
2. The **Create workspace if missing** check box is set as desired.

10.8 Saving system configurations by standard user license

If you want the Salesforce Standard user license to save system configurations in the Content Services by OpenText application, you must add the necessary permissions:

1. From the Salesforce menu, select **Setup**.
2. In the **Quick Find** box, search for **Permission Sets**.
3. Clone the **OpenText Content Services Admin** permission set to create an **OpenText Content Management Standard User** permission set.
4. Change the **Label**, **API Name**, and **Description** to desired values.
5. Open the new permission set and navigate to the **System** section.
6. Click **Systems Permissions** and click **Edit** near the top of the page
7. Select the check box for **Customize Application**.
8. Save the setting change. Confirm the additional dialog asking if you want to save these permissions with **Save**.
9. While on the permission set, click **Manage Assignment** at the top of page.
10. Click **Add Assignments** to add all desired users to the permission set.

10.9 Upgrading to SOQL editor Lightning component

A new Salesforce Object Query Language (SOQL) editor Lightning component has been added to the following tabs when in edit mode:

User Synchronization, Batch Content Upload, and Batch Workspace Creation.

This editor component replaces the previous manual filter box and allows for more intuitive user predicate creation and more secure coding practices.

Tip: The editor component does not upgrade your existing queries automatically. You must manually convert these queries to the component editor. To aid you in the conversion, you can use the **Show Legacy Filter** check box below the editor. Selecting the check box will display the previous filter conditions to help you recreate the filter.

10.10 Explicitly saving background jobs

The master schedulers do not seem to start when the system configuration is saved. Background jobs require an explicit **Save** to ensure that new parameters are set and the jobs are restarted according to the new values. If your master scheduler jobs are not working as expected, OpenText recommends that you explicitly save the background jobs.

To save the background jobs:

1. In the navigation tree on the left, click **System Configuration** > **Environment** > **Background Jobs**.
2. On the **Background Jobs** page, explicitly click **Save**.

10.11 Optimizing document and Chatter/Pulse migration

The content synchronization processes have been improved. To take advantage of the optimizations, the following triggers must be updated for content and Chatter/Pulse migrations. These trigger advancements are in the OpenText Content Management for Salesforce CRM Solution Accelerator 22.1:

- ContentDocumentTrigger
- ContentTriggerTrigger
- ContentDocumentLinkTrigger
- FeedItemTrigger
- FeedCommentTrigger

If you only upgrade the Salesforce side of the application, you will not get these new trigger codes. If new triggers are not in place, the documents are not migrated to Content Server immediately. You may need to run certain job processes for the document to be migrated. However, metadata update made to Business Workspace is immediate. The content IDs will be put onto the metadata queue as before, the new optimizations will be bypassed, and the previous process will proceed with its configured schedule. Therefore, OpenText recommends that you download and install the latest Solution Accelerator package to update the existing trigger definitions.

10.12 Hiding the Visualforce tabs

After an upgrade, the new version of the Visualforce tabs are available in the lightning interface. You must manually hide the old version of these tabs to exclude them from app search.

To hide the Visualforce tabs:

1. Log on to Salesforce.
2. Navigate to **Setup** > **Profiles** > **System Administrator**.
3. Click **Edit**.
4. Under **Custom Tab Settings**, select **Tab Hidden** for **Error Handler**, **Reporting**, and **Logging**.
5. Click **Save**.

10.13 Excluding custom objects from Salesforce search

You must clear the **Allow search** check box to exclude the custom objects from the Salesforce search index.

To exclude custom objects from Salesforce search:

1. Log on to Salesforce.
2. Navigate to **Setup** > **Object Manager** > **Batch Content Upload**.
3. Click **Edit**.
4. Under **Search Status**, clear the **Allow search** check box.
5. Repeat Step 3 and 4 for the below custom objects:
   - Business Process
   - Document Property Provider
   - Event Queue
   - Event Update Queue
   - Group Synchronization Entity
   - Role Synchronization Entity
   - Batch Workspace Creation
6. Click **Save**.

10.14 Removing previous jar files

After an upgrade, the previous versions of jar files remain along with the new versions. You must remove the old files manually.

To remove the previous jar files:

1. On the OpenText Content Management machine, navigate to `<drive>:<OPENTEXT_HOME>\module\salesforceinterface_16_2_4\ojlib`
2. Delete the duplicate and older version of the jar files:
   - force-wsc
   - commons-codec
   - httpclient
   - log4j-api
   - log4j-core
3. Restart the Content Server services.

Part 5
Uninstalling

Chapter 11

Uninstalling on Salesforce

11.1 Preparing to uninstall

1. Log on to Salesforce.

   Go to **Setup > Manage Users > Permission Sets**. For each of the OpenText permission sets do the following:

   a. Click the permission set label.

   b. Click **Manage Assignments**.

   c. Remove each assignment of the permission set.

   d. Delete the permission set.

2. Go to **Setup**. For the objects that you used for OpenText Content Management for Salesforce, do the following:

   a. Click **Page Layout**.

   b. Click **Page Layout Assignments**.

   c. Click **Edit Assignments** and remove the OpenText layouts from all profiles.

11.2 Uninstalling the Enabler and the Solution Accelerator

The Solution Accelerator package must be removed before the Enabler package.

To remove OpenText Content Management for Salesforce on Salesforce:

1. Remove anything that you added to Salesforce which refers to any of the OpenText Content Management for Salesforce components, for example page layouts.

2. Go to **Setup > Build > Installed Packages**.

3. Remove first the **OpenText Content Services Solution Accelerator** package.

4. Remove the **Content Management for Salesforce** package.

5. Remove **Content Services for Salesforce** package.