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OpenText™ Documentum™ Content Management for Engineering

Integration Guide

Integrate OpenText Documentum CM for Engineering with OpenText Core Collaboration for Engineering and Brava.

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OpenText™ Documentum™ Content Management for Engineering Integration Guide

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Chapter 1

Introduction

The OpenText Documentum CM for Engineering integration guide provides instructions for integrating Brava, Blazon, and other third party products with OpenText Documentum CM for Engineering.

1.1 Reviewing System Requirements for Brava and Blazon

Verify if the servers and computers meet the system requirements listed in the following documents:

- *OpenText Documentum Content Management (CM) for Engineering 25.4 Release Notes*
- *Brava Enterprise for D2 Administrator's Guide*
- *Blazon Enterprise Administration Guide*

Chapter 2

Integrating Brava

You can use OpenText Documentum CM for Engineering and Brava in a single interface to view and annotate documents. The integrated solution provides contextual and visual asset information and task management in a combined view.

Test content

Note: Brava Enterprise Viewer and Blazon (comment burn-in) is supported only in on-premises environment.

2.1 Integrating Brava Enterprise Viewer and Blazon in OpenText Documentum CM for Engineering

Brava features are:

- Pre-create Brava viewer widget for viewing content.
- Contains customized servlet to ensure that the HTML viewer will:
  - Pre-load markups for review when opening document in viewer.
  - Pre-default markup file name on save.
  - Restrict markup consolidation to consolidator role.
  - Create annotated PDF with markups as comment while sending project transmittal. (Blazon required for this task.)

2.2 Enabling annotated PDF with markup using Blazon

The comment package generation uses Blazon to create PDF renditions for transmittal documents.

OpenText Documentum CM for Engineering can create annotated PDF with markup as comments while sending transmittals or supplier document schedule. You can enable this option by configuring the Blazon server in the client configuration dictionary.

Update the dictionary as described in the following table:

Table 2-1: Enabling annotated PDF

Dictionary	Description
Name	Transmittal Comment Config
Key	Comment Config
Use the following alias: URL	You can use a Blazon base URL. For example: http://blazonServer:8090/QueueServer/push.aspx
Time Out	Maximum time (in milliseconds) till when the transmittal processor waits for PDF rendition by Blazon, after the timeout method throws an exception.
Source Location	The source documents will be exported to this root folder. The folder must be accessible by Method and Blazon server. For example: `\\BlazonHostname\BlazonDirs`
Publish Location	The generated PDF can be saved in this folder. The folder must be accessible by Method and Blazon server. For example: `\\BlazonHostname\BlazonDirs` You can use the same as source location unless you use Unix and Windows for OpenText Documentum CM server and Blazon server.
Implementation Class	For Blazon integration, you must use `com.documentum.epfma.transmittals.sheets.blazon.AnnotatedDocumentGenerator`

Dictionary	Description
Version Filter • CURRENT • REVISION • ALL • CONSOLIDATOR • CONSOLIDATOR_ALL	Defines markups defined against which versions of the document are used while burning the annotated PDF. Possible values are: • Retrieves all markups related to CURRENT version of the document while generating the annotated PDF. • Includes all markups related to all versions of the document whose eif_revision value is same as the eif_revision value of the version being processed. This covers all Revision markups. • Includes all markups related to all versions of the document while generating the annotated PDF. • This is a default state. This includes the consolidators owned markup only in the current version. If consolidator markup file is not found then it automatically includes all markup in current version. • Includes the consolidators owned markup in ALL versions. If consolidator markup file is not found then it automatically includes all markups in ALL version.

Chapter 3

Configuring OpenText™ Content Management for SAP Solutions

3.1 Deploying OpenText Content Management

Note: Before you deploy OpenText Content Management, you make sure that the steps documented in *OpenText Documentum Content Management (CM) for Engineering Cloud Deployment Guide* is completed.

To deploy OpenText Content Management components, see *OpenText Content Management for SAP Solutions - Installation and Upgrade Guide (ERLK-IGD)*.

3.2 Post-deployment

3.2.1 Setting up OpenText Directory Services

1. Access the OpenText Directory Services (OTDS) admin website `<D2Ingress URL>/otds-admin` with the `admin` as the user name and the value of the password you specified in the OTDS helm chart's `values.yaml`.
2. Click **Resources**.
3. Select **cs**.
4. Click **Actions**.
5. On the **Impersonation Settings** page, select **Allow this resource to impersonate users**.
6. From the web administration menu, click **Access Roles**.
7. From your access role's **Actions** menu, click **View Access Role Details**.
8. Add OpenText Documentum CM partition.
9. Click **Save**.
10. Select the **Resources** tab.

    Consolidate the OpenText Content Management and OpenText Documentum CM resources.

3.2.2 Setting up license in OpenText Directory Services

1. Access the OTDS admin website `<D2Ingress URL>/otds-admin` with the `admin` as the user name and the value of the password you specified in the OTDS helm chart's `values.yaml`.
2. Click **License Keys**.
3. Select Content Server license, click **Actions** and select **Add License Key** and provide Content Server licence.

   Click **Add** to create a new license details, if you are unable to locate the Content Server licence.
4. Follow the same steps for the **ObjectImporter** and **WebReports** license details.

3.3 Configuring SAP

Refer to the *OpenText Content Management for SAP Solutions - Installation and Upgrade Guide (ERLK-IGD)* guide and configure the following tasks:

- Exporting the SAP PSE certificate for the SAP authentication handler
- Creating HTTP connections in the SAP system
- Creating logical ports using HTTP connections in the SAP system
- Configuring the SPI service
- Maintaining Extended ECM connections

3.4 Configuring parameters in OTCS

You can configure the following parameters to connect OpenText Documentum CM for Engineering with SAP solutions to create the required business workspaces.

3.4.1 Enabling an user with admin privileges

1. Log in to the OTCS website with admin credentials. For example, **<OTCS Ingress URL>/cs/cs**
2. Navigate to **Enterprise** >**User and Groups**.
3. Search for a user.
4. Click **Edit**.
5. In **Privileges**, select **System administration rights**.
6. Click **Apply**.
7. In **Department**, select **Business administrators**.
8. Click **Update**.

3.4.2 Configuring security parameter

1. Log in to the OTCS website with admin credentials. For example, **<OTCS Ingress URL>/cs/cs**
2. Click **Admin** and select **Content Server Administration**.
3. Search and select **Security Parameters**.
4. Perform the following:
   a. For Log-In Requests Methods, select **Allow log-in via HTTP GET request**.
   b. For Frame Embedding, select **Allow iFrame Embedding**.
   c. In Referring Websites, make sure that you have ***.otxlab.net** as trusted website.
   d. In Cross-Domain, make sure that you have ***.otxlab.net** as trusted domains.
5. Click **Save**.
6. Click **Continue**.

3.4.3 Configuring connections to external systems

1. Log in to the OTCS website with admin credentials. For example, **<OTCS Ingress URL>/cs/cs**
2. Click **Extended ECM** and select **Configure Connections to External Systems**.
3. Click **Add External System**.
4. Perform the following:

Table 3-1: Connection parameters

Parameter	Description
Logical External System Name	Define the logical name of the external system. The name must be unique. It must not be longer than 32 characters. This name is used when you select the external system in the business object type configuration. For example, the name of the SAP system.
Connection Type	Select the required connection type.
Enabled	Select to enable the configuration.
Comment	Type the required comment.

Parameter	Description
Base URL	Common URL for accessing applications by using a Web browser. You can use this base URL when configuring business object types on Content Server. The base URL is represented by the `$BaseURL$` variable for new business object types.
Application Server Web Service Endpoint	Specify the URL to retrieve the business object information.
Schema Version	Select the required interface version.
User Name	Type the user name that can be used to access the business object type information from the external system.
Password	Specify the password.
Test Connection	Click **Test** to verify the connection to the external system. You may notice **Connection test to <Logical External System Name> was successful** message appears.

5. Click **Documentum** and type the required details. The resource identifier is from OTDS which is created as part of "Setting up OpenText Directory Services" on page 11.

6. Click **Save**.

3.4.4 Importing transport packages in xECM

To create SAP workspaces in OpenText Documentum CM for Engineering, perform the following steps to import the configurations:

Note: The transport package is provided for reference purpose. You can use these configurations to connect to OpenText Documentum CM for Engineering or create new configurations.

1. Download the OpenText Documentum CM for Engineering SAP related transport package from *My Support*. The name of the transport package is `ao_sap_tp.zip`.

2. Log in to the OTCS website with admin credentials. For example, **<OTCS Ingress URL>/cs/cs**.

3. Navigate to **Enterprises** > **Transport Warehouse**.

4. Click **Transport Packages**.

5. Click **Add Item**.

6. Select **Transport Package**.

7. In the **Add: Transport Package** dialog box, type transport package name.
8. Select the downloaded transport package.
9. Click **Add**.

   The transport package is added.
10. Select the transport package and select **Unpack to Workbench**.
11. Click **Create New**.

    a. In **Add: Workbench**, type the name of the workbench.

    b. Click **Add**.

    c. Click **Unpack**.

    d. A new workbench is created in the transport packages.
12. Select workbench folder and click **Deploy Workbench**.

    If **Cannot deploy Item** appears as the error message, then select the artifact and make necessary changes.
13. Click **Edit** and assign the required value.

    Note: An error message may appear even if the parent name is the same. You can ignore or click **Edit and Save**.
14. After the **OK to deploy** message appears for all artifacts, click **Deploy**.
15. Navigate to **Enterprise** to verify all the artifacts.
16. To ensure that the OpenText Documentum CM repository and property mappings are configured to Business object type:

    a. Navigate to **Enterprise**>**Extended ECM**>**Business Object Types**.

    b. Open an imported business object type.

    c. Select the **Documentum** tab.

    d. Select the required Repository and OpenText Documentum CM client folder structure.

    e. In **General** tab, verify the existing property mappings.

    f. Click **Save**.

3.4.5 Configuring Content Server document template

1. Navigate to **Admin** > **Content Server Administration**.
2. Search for **Configure Content Server Document Templates** and select the required content.
3. In **Classification Settings : Global Configuration**, select the classification tree whichever is applicable.
4. Click **Save**.

3.4.6 Run Diagnostic check

1. Navigate to **Admin** > **Documentum Server Administration**.
2. Search for **Run Diagnostic Check** and select the required content.
3. Select the Business Application, Business Object Type and click **Run diagnostic check**.
4. As per the report, update the required changes.

3.5 Settings in Documentum Administrator

1. Log in to Documentum Administrator with admin credentials.
2. Navigate to **Cabinets**.
3. Right-click **Operations** and select **Properties**.
4. Click **Permissions**.
5. In Additional permissions, add the xECM user.
6. Provide **Write** permissions.
7. Click **OK**.

Chapter 4

Configuring OpenText Documentum CM for Engineering Connector for Core Collaboration for Engineering

The OpenText Documentum CM for Engineering Connector for Core Collaboration for Engineering connects OpenText Documentum CM for Engineering to Core Collaboration for Engineering V3. After you install the connector, plant owners operators can exchange deliverables and transmittals with Suppliers through Core Collaboration for Engineering.

Subscription Creation for Core Collaboration for Engineering

To get client ID and client secret for new subscription, contact Core Collaboration for Engineering OpenText Global Technical Services.

For more information, see *Administration* in *OpenText Core Collaboration for Engineering - Administration Help (CDCOLSPRJ-H-AGD)*. and *Generating client credentials for an app* in *OpenText Admin Center - App Administrator Help (CDAC-H-ASC)*.

After you install OpenText Documentum CM for Engineering Connector, the following information is updated in `System Connection Config.xml` file.

Table 4-1: System xChange config parameters

Parameters	Description
url	Specifies the `url` for connecting to the Core Collaboration for Engineering.
client_id	Specifies the Core Collaboration for Engineering Subscription client ID.
client_secret	Specifies the Core Collaboration for Engineering Subscription client secret.
subscription_name	Specifies the Core Collaboration for Engineering Subscription name.
proxy_host	Specifies the proxy host details if any.
proxy_port	Specifies the proxy port if any.
se_version	Specifies the Core Collaboration for Engineering **v2** or **v3** version.

This chapter contains the information for using the features of OpenText Documentum CM for Engineering Connector for Core Collaboration for Engineering.

4.1 Creating a collaboration workspace in Core Collaboration for Engineering

OpenText Documentum CM for Engineering extended with the connector provides a new document type, Supplier Document Schedule (SDS). SDS properties capture the project, contract, and supplier information for an awarded contract. The lifecycle menu action **Share with Supplier** creates a collaboration space in Core Collaboration for Engineering reflecting these values.

By default, OpenText Documentum CM for Engineering Connector configures members of `ao_admins` group as admin users.

The following tasks are configured in `System xChange Config.xml` file:

- Supplier Document Schedule is synced with Core Collaboration for Engineering.
- A Contract which is identified by the PO number is auto created.
- A Deliverable list is auto created.
- All AO document associated with the Supplier Document Schedule are created as a placeholder deliverable in Core Collaboration for Engineering.
- Contract members are created from the defined membership on the Supplier Document Schedule object.

4.2 Synchronization of fields set on deliverables in OpenText Documentum CM for Engineering

The metadata of deliverables in Core Collaboration for Engineering can be copied into the metadata of the corresponding documents in OpenText Documentum Content Management (CM) for Engineering.

During ingestion, the content and metadata are retrieved and synchronized with OpenText Documentum CM for Engineering documents. The `System Connection Config.xml` file contains the settings for a deliverable.

The following are the creation settings for a deliverable.

```
<parent target="saas_beacon_checklistitem" auto_create="true"     picklists_profile=""
roles_profile=""><match/>

<properties>
    <property target="name" source="object_name" default=""/>

     <property target="description" source="title" default=""/>

  <property target="issueReason" source="eif_issue_reason" default=""
sync_options="create,ingestion"/>
```

```
  <property target="alternateDocNo" source="ao_control_doc_number" default=""/>

  <property target="revisionCode" source="eif_revision" default=""
sync_options="create,ingestion"/>

  <property target="plannedDate" source="ao_planned_date" default=""/>
    <property target="forecastDate" source="ao_forecast_date" default=""
sync_options="ingestion" data_type="date"/>
</properties></parent>
```

The allowed options for **sync_options** attribute are '**ingestion**' , '**create**', '**ingestion, create**'.

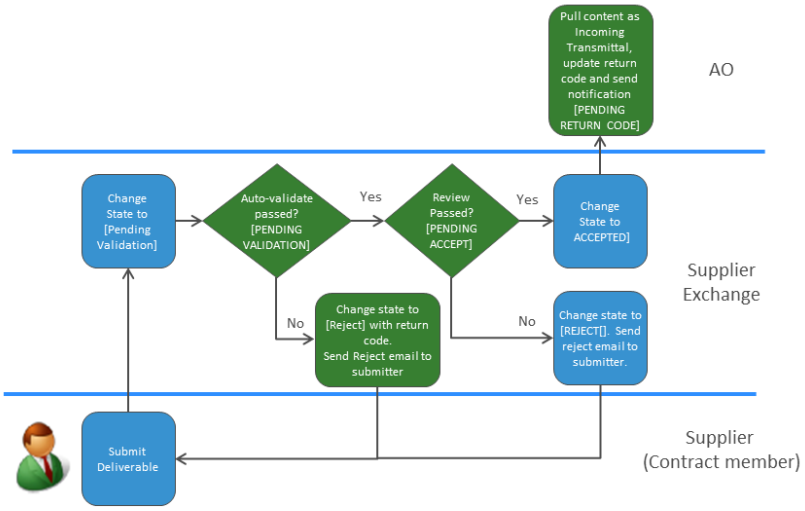
- If you specify **ingestion** as a sync option, the field is not set during deliverable registration. The deliverable is created in Core Collaboration for Engineering and the fields with **ingestion** as the sync_option remains empty.

  Whenever you run the `EPFMACRegisterAoDocumentsJob` to register the deliverable into OpenText Documentum CM for Engineering, the OpenText Documentum CM for Engineering attribute values specified as the source for these fields are set with the values of these fields in Core Collaboration for Engineering.
- If you specify only **create** as sync_option, or if you do not specify any option, the field in Core Collaboration for Engineering is set at the time of deliverable registration. The corresponding attribute in OpenText Documentum CM for Engineering is not overwritten during ingestion.
- If you specify both **ingestion** and **create** as sync_options, the corresponding fields in Core Collaboration for Engineering are set at the time of document registration. At the time of ingestion, they are overridden in OpenText Documentum CM for Engineering.

4.3 Incoming transmittal from Core Collaboration for Engineering

The Supplier can submit a deliverable in Core Collaboration for Engineering. In response to the posted supplier deliverable (as Primary content), Core Collaboration for Engineering performs a set of pre-validation checks; and, upon passing, transfers the deliverables to the OpenText Documentum CM for Engineering repository through an incoming transmittal.

The following diagram illustrates the submit deliverable workflow:

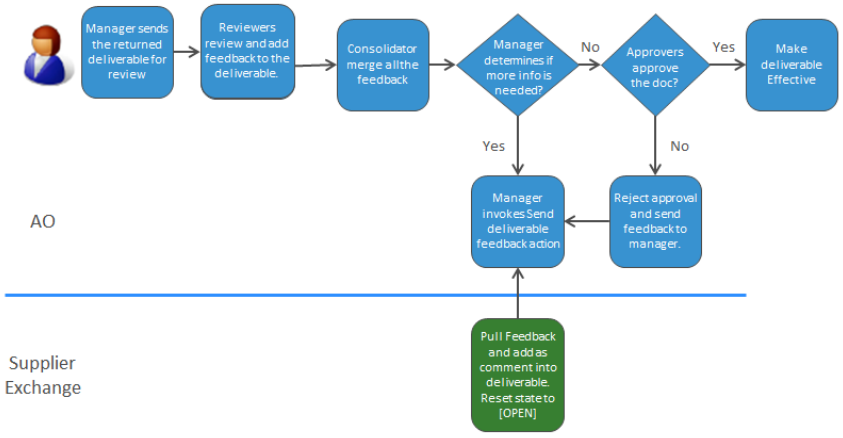


The validated deliverable with accepted status is sent to the OpenText Documentum CM for Engineering repository as a minor version to the originated document and the status is set to **Draft** in OpenText Documentum CM for Engineering.

An email notification is sent to document authors on successful deliverable return back to OpenText Documentum CM for Engineering or to the OpenText Documentum CM for Engineering repository. If an error occurs, a failure notification is sent to the administrator.

4.4 Sending feedback to Core Collaboration for Engineering

The following diagram illustrates the OpenText Documentum CM for Engineering Connector sending feedback to Core Collaboration for Engineering workflow:



After the Supplier documents are sent through the review workflow in OpenText Documentum CM for Engineering, the SDS manager either rejects the document or sends the document for approval. The SDS manager rejects the document by right clicking on the document and select the **Send Feedback** option to send back either the source or PDF format of the document.

This option sends the document to Core Collaboration for Engineering and moves the deliverable to **Open** state with return code set to **Reviewed with Comment** and reject notification is sent to the originated submitter. This creates a comment document in Core Collaboration for Engineering for the deliverable and re-enable the Supplier to update the document in Core Collaboration for Engineering and re-submit.

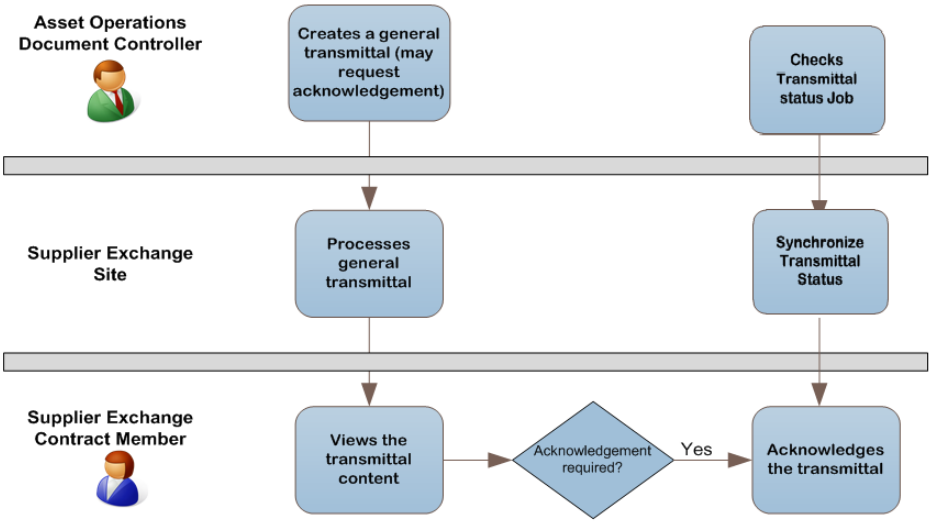
Supplier receives an email notification every time OpenText Documentum CM for Engineering user submits the deliverable with feedback comments.

4.5 Sending general or project transmittals to OpenText Documentum CM for Engineering

General or Project Transmittals are extended by OpenText Documentum CM for Engineering Connector to send reference documents to the collaboration space created in Core Collaboration for Engineering.

A general or project transmittal attachments are sent to OpenText Documentum CM for Engineering when the transmittal contains a PO number.

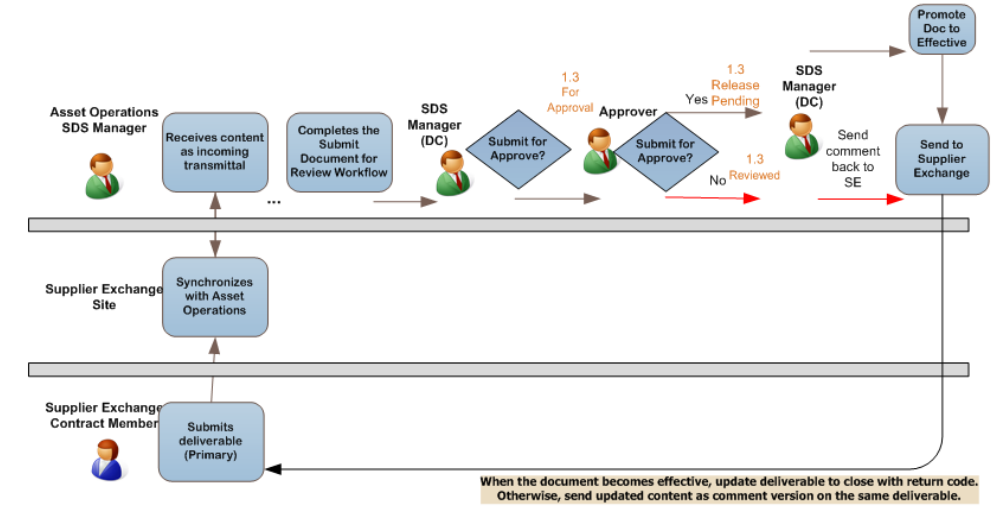
The following diagram illustrates OpenText Documentum CM for Engineering Connector sending transmittal to external parties workflow:



4.6 Approve deliverable

In OpenText Documentum CM for Engineering, every time the asset document is reviewed and approved and the status is in effective state, the connector updates the deliverable status to `Open` in Core Collaboration for Engineering with return code as **Approved**.

The following is the OpenText Documentum CM for Engineering Connector approver workflow:



Note: In Core Collaboration for Engineering, a close deliverable cannot be re-submitted.

Supplier receives an email notification every time OpenText Documentum CM for Engineering users changes a document to effective status and while closing the deliverable in Core Collaboration for Engineering.

4.7 Close supplier document schedule

OpenText Documentum CM for Engineering queries all the Supplier Document Schedules (SDS) that were closed during the last 90 days and deletes related contracts, deliverables, and transmittal in Core Collaboration for Engineering.

The `EPFMACDeleteSDSJob` job uses `Inactivity interval` parameter to determine the retension period before deletion. You can overwrite the interval by providing a numeric value that represents the number of day(s) to retain in Core Collaboration for Engineering.

4.8 OpenText Documentum CM for Engineering transmittals marked as acknowledged

Transmittal recipient can mark the transmittal acknowledged in Core Collaboration for Engineering.

OpenText Documentum CM for Engineering Transmittals that are marked for acknowledgement required are synced periodically with the Core Collaboration for Engineering transmittals to update the status.

4.9 OpenText Documentum CM for Engineering Connector jobs in Core Collaboration for Engineering

Table 4-2: Connector jobs

Job name	Description
`EPFMACRegisterAoDocumentJob`	Creates a collaboration space and placeholder deliverables for Supplier Document Schedule.
`EPFMACImportAoDocumentsJob`	Ingests the approved documents from Core Collaboration for Engineering to OpenText Documentum CM for Engineering.
`EPFMACSendAOReviewFeedbackJob`	Ingests the reviewed comment document to Core Collaboration for Engineering from OpenText Documentum CM for Engineering.
`EPFMACDeleteSDSJob`	Deletes all the contracts and deliverables, deliverable-lists, and transmittals after the specified retention period.

Job name	Description
EPFMACCloseDeliverableJob	Changes the deliverable return code to Accepted in Core Collaboration for Engineering after the asset document is in effective state in OpenText Documentum CM for Engineering.
EPFMACMarkAoTransmittalsAcknowledgedJob	Updates the acknowledgment status for the OpenText Documentum CM for Engineering transmittal based on the acknowledged status for the transmittals in Core Collaboration for Engineering.

Chapter 5

Troubleshooting

This section provides information to help you troubleshoot installation problems.

Table 5-1: Troubleshooting details

Problem	Cause	Resolution
An OpenText Documentum CM for Engineering Connector installer error occurs.	Your certificates have not been installed into the Java keystore, hence unable to connect to `https://sxchange.ot2.opentext.eu`. You must ensure that you have installed the root certificate for this site before you start your services.	During Documentum installation for SSL connections between docbroker and its client, if different keystore (`<path to Documentum directory>\Documentum\dba\secure\dfcssl_t.keystore`) is configured apart from JDK default keystore, then OpenText Documentum CM for Engineering certificate must be imported into this keystore as well.
Unable to connect to Core Collaboration for Engineering after installation.	The `ao_supex_name` name could be incorrect.	Verify the Core Collaboration for Engineering site name and make sure there is no trailing spaces.
Unable to install `dar` to the repository.	The Java version is not supported by Composer.	Locate the `xChange Respository Components.dar` file in the install package at `<install_package>\xchange\RepositoryConfig\docapps\local` location and install the `dar` file to local repository using the dardeployer.

Problem	Cause	Resolution
An SSL communication error occurs.	Relax the certificate to resolving SSL communication issues.	**Note:** Support team can relax the certificate and change the property after the issue is resolved. 1. Change the `com\emc\documentum\http\connection\factory\HTTPConnectionFactory.properties` file in the `base-rest-client.jar` file. 2. Use the following entry: `options.relax.certificate.check=false|true` where • Use `false` when connecting to the SaaS production environment. • Use `true` when valid certificates are not available or connection runs over HTTP. 3. Replace the jar file. 4. Clear the Java Method Server cache and restart the Java Method Server.

Appendix A. Supported file formats

Refer to the respective guides for the supported file formats for Core Collaboration for Engineering, Brava!, Blazon Enterprise, and Transformation Services.