

OpenText™ Documentum™ Content Management

Smart View User Guide

Store, view, share, analyze, and distribute files and documents. Use workflows and lifecycles and generate reports. Gain insights about documents with OpenText™ Content Aviator.

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**OpenText™ Documentum™ Content Management
Smart View User Guide**
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Table of Contents

1	Get started	7
1.1	Landing page	7
1.1.1	Common tiles	8
1.1.2	Administration tiles	11
1.2	Navigation	12
1.2.1	Keyboard shortcuts	13
1.3	Basic actions	14
1.4	User settings	17
2	Content management	21
2.1	Content actions	21
2.2	Search	30
2.2.1	View search results	31
2.2.2	Advanced search	31
2.2.3	Searches page	34
2.3	Open content in a viewer	35
2.3.1	Use BravaCSR viewer	36
2.3.2	Compare files	39
2.3.3	Merge files	40
2.3.4	Publish a file to PDF or TIFF	41
2.3.5	Use tokens in watermarks and banners	43
2.3.6	View multiple files	44
2.3.7	Use Accessible compliant mode	45
2.3.8	Consolidate markups	46
2.4	View and edit content properties	48
2.5	Create new content	49
2.6	Edit content	50
2.6.1	Edit and co-author in Microsoft 365	51
2.7	Add a folder or a cabinet	52
2.8	Upload content	52
2.9	Upload a folder and its contents	54
2.10	Drag and drop to upload content	55
2.11	Inherit from existing content to create or upload	56
2.12	Mass update content	56
2.13	Recycle bin	58
2.14	Share content with external services	60
2.14.1	OpenText Core Share	60
2.15	Content relations	61
2.15.1	Create content relations	61
2.15.2	Work with content relations	62

2.16	Collections	63
3	Virtual documents	69
3.1	Navigate virtual documents	69
3.2	Virtual document actions	71
3.3	Edit virtual documents	73
3.4	Compare virtual documents	76
4	Workflows and lifecycles	77
4.1	Differences between workflows and lifecycles	77
4.2	Workflows	78
4.2.1	Send content to a workflow	79
4.2.2	Navigate workflows	80
4.2.3	Search for workflows	81
4.2.4	Work with workflows	81
4.2.5	Workflow actions	82
4.3	Tasks	84
4.3.1	Navigate tasks	84
4.3.2	Work with tasks	85
4.3.3	Work with tasks in context	87
4.3.4	Task actions	89
4.3.5	Tasks with digital signatures	94
4.3.6	Tasks with process variables	95
4.4	Lifecycles	95
4.4.1	Send content to a lifecycle state	96
4.4.2	Multi-file lifecycle support	96
4.4.2.1	Individual processing of lifecycle state change	97
4.4.2.2	Bulk processing of lifecycle state change	98
4.5	Workflow insights	98
5	Workspaces	101
5.1	The Workspace page	101
5.2	Find a workspace	102
5.3	Create a workspace	102
5.4	Edit workspace properties	103
5.5	Workspace members and roles	103
5.5.1	View members and roles	104
5.5.2	Add members to roles	104
5.5.3	Remove members from roles	104
6	Content Aviator	105
6.1	Use Content Aviator on documents	106
6.2	Use Content Aviator on virtual documents	108

6.3	Charts supported in Content Aviator	110
7	Sensitivity labels	111
7.1	View sensitivity labels	112
7.2	Understand sensitivity label behavior	112
8	Reports	115
8.1	Reports Landing page	115
8.1.1	Reports tiles	115
8.1.2	Common columns on the Reports Landing page	116
8.1.3	Reports content actions	116
8.2	Create reports	117
8.2.1	Create a report	117
8.2.2	Create a report using a template	118
8.2.3	Design a report	119
8.2.4	Add a logo to a report	120
8.3	Create a dashboard	121
8.4	Add external data sources	121
8.5	Configure reports	122
8.5.1	Edit a report	122
8.5.2	Edit report properties	122
8.5.3	Rebind a report or dashboard	122
8.5.4	Reformat a report	123
8.6	Run a report	123
8.6.1	Configure a report to run as a scheduled job	123
8.7	Configure Reports Configurations preferences	125
8.8	Advanced configurations	125
8.8.1	Specify multiple queries	126
8.8.2	Format date strings	126
8.8.3	Add parametric queries	127
8.8.4	Add hyperlinks	128
8.8.5	Create relations	128
8.8.6	Switch expression statements	130
8.9	Tips	130
9	Mobile	133
9.1	Mobile Landing page and common tiles	133
9.2	Mobile menu	135
9.3	Biometric authentication	136
9.4	Mobile content actions	136
9.5	Browse and search for content	138
9.5.1	Facet search	139
9.6	Upload content	139

9.6.1	Scan and upload	141
9.7	Work with content offline	143
9.8	Scan a barcode or QR code	145
9.9	Add content relations	145
9.10	Collections	146
9.11	Workflows	150
9.12	Tasks	151
9.12.1	Navigate tasks	152
9.12.2	Work with tasks	152
9.12.3	Task actions	153
9.12.4	Tasks with digital signatures	156
9.13	Lifecycles	157
9.13.1	Send content to a lifecycle state	158

Chapter 1

Get started

OpenText Documentum Content Management (CM) has three end user interfaces: Classic View, Smart View, and Mobile. Smart View is a responsive, tile-based interface supported by multiple devices. This guide is written for the Smart View interface.

If configured, you can switch from Smart View to Classic View at any time. On the **Profile Menu**, click **Classic View**.



Note: Depending on your settings, you might be required to log in again when you switch interfaces.

1.1 Landing page

The *Landing* page is the starting page that opens when you sign in. The goal of the Landing page is to provide you with easy access to the functionality that is specific to your needs.

To go to the Landing page from anywhere in the application, click the OpenText logo on the **header** or an alternate logo customized for your organization.

The Landing page is made up of several smaller sections, called *tiles*.



Note: You might have access to multiple Landing pages. For example, you might have access to the **Reports** Landing page, which provides access to the **Reports** feature. Additional Landing pages appear on the **Profile Menu**. Each Landing page can be configured to include different tiles.

Common tile elements



Search

On the Landing page header, search might be configured so the **Search** field always appears, or you might need to click the **Search** button to enter your term. From the Landing page, you can perform a simple search that searches the entire repository. Details of the search methods are configured by your administrator.


Within tiles and other containers, you can perform a simple search to quickly locate items within that location by clicking the **Search** button in the header



, and typing the name or partial name of an item you want to find. You can search your current locations or sub-locations, or the whole repository.

When you perform a search, you can search the entire repository or within your current results. In the results list, you can select single or multiple items

to **Share** (through emailed links or external services), **Copy link**, **Download**, **Print**, and more.

Some Doclist tiles allow you to isolate your search to certain list columns, such as **Name** or **Status**. Click the  icon in the column heading to activate that focused search.



Maximize

Expand the tile. Additional functions might be available for tiles when expanded.



More actions button (in minimized tiles)

Some minimized tiles that display individual items (such as the **Favorites** tile) allow you to perform actions on items by pointing to an item and clicking the

More actions button .



Note: The actions available for minimized tiles is limited. Maximize the tile to see the full list of actions.



Add favorite

Click the **Add favorite** icon to select/deselect your current folder as a favorite.



Comments

Click the **Comments** icon to add a comment at the folder or item level.

1.1.1 Common tiles

This section describes the most common tiles that can appear on a Landing page.





Note: The tiles that appear on the Landing page and their names depend on your Smart View configuration.

Document List

The **Doclist** tile allows you to browse through and search the areas of the repository to which your administrator has granted you access.

What can you do on the Document List tile?

Browse the repository

Click the cabinets  and folders  that comprise the repository to drill down to content. Remember that you might not have access to all levels of the repository.



Note: Depending on your configuration, the cabinet and folder icons might be customized.

Click a column header to sort content. Use filters or facets to reduce the number of listed items.

Favorites


The **Favorites** tile lists all the items you have designated as favorites.




Note: Expand the tile to access the full range of features.

What can you do on the Favorites tile?

Remove favorite

Click the **Remove Favorite** button  to remove an item from your favorites list.

Search for a favorite item

Click the **Search** button , and then type an item name in the field.

Collections


Collections are assemblies of files, folders, and cabinets useful for quick access to perform your work. The **Collections** tile displays your recently accessed collections and collections that are shared with you, to a maximum of 10 each. For more information, see [“Collections” on page 63](#).



Note: Expand the tile to access the full range of features.

What can you do on the Collections tile?


List collection items

Click  next to a collection to display a list of its items, to a maximum of 10.

View a collection item

Click the collection item to open it in a viewer or download a copy.

Perform actions on a collection item

Point to the collection item, click the **More actions** button , and then click an action.

Recently Accessed

The **Recently Accessed** tile helps you to quickly find documents or items you have recently opened and provides details about an item, such as when it was last accessed, what user has it checked out, and where it is stored.



Notes

- Your administrator can choose which item types to display in the **Recently Accessed** tile.


- Expand the tile to access the full range of features.

What can you do on the Recently Accessed tile?

Add or remove favorites

Click the **Add Favorite** button  or the **Remove Favorite** button  to add or remove an item as a favorite.

Search

Click the **Search** button , then type an item name in the field.

View properties

Click the **Properties** button  on the **Inline Action Bar**.

Checked Out Documents


The **Checked Out Documents** tile shows all of the items that you have checked out.




Note: Expand the tile to access the full range of features.

What can you do on the Checked Out Documents tile?

Add or remove favorites

Click the **Add Favorite** button  or the **Remove Favorite** button to add or remove an item as a favorite.

Search

Click the **Search** button , then type an item name in the field.

Cancel checkout

Click the **Lock** icon to cancel your checkout hold on an item.

Saved Searches

The **Saved Searches** tile allows you to access repository search queries that you or others have saved. The queries are grouped within the tile for easy identification, and can be searched within the tile.



Note: Expand the tile to access the full range of features.

My External Shares

The **My External Shares** tile displays all of the content you have shared with external collaboration services, such as OpenText Core Share.



Note: Expand the tile to access the full range of features.

URL Link

Your administrator can add **URL Link** tiles to the Landing page that allow you to visit internal or external sites. The sites open in a new browser tab.

Workflows

Your administrator can add a workflow monitoring tile to the Landing page and can configure the name of the tile. It is often called **My Workflows**. The tile features a circle graph that shows the percentage of your active workflows that are Scheduled, Running, or Paused. Other workflow tiles might allow you to search workflows in the system using a query form. See [“Workflows” on page 78](#) for more information.

My Tasks

The **My Tasks** tile contains a list of workflow tasks that other users have assigned to you. The default sort order of the tile is descending order by sent date (**Sent**), so the most recent task is at the top of the list. Unread tasks appear in bold type. See [“Tasks” on page 84](#) for more information.



Note: Expand the tile to access the full range of features.

Recycle bin

The **Recycle bin** tile provides access to your recycle bin, where you can view, restore, and purge items that you have deleted. Your Smart View configuration might not have the recycle bin enabled. For more information, see [“Recycle bin” on page 58](#).

1.1.2 Administration tiles

This section describes tiles meant for users with additional responsibilities and permissions. These tiles allow you to perform more complex tasks and to configure Smart View.



Notes

- Administration tiles might appear on a separate Landing page, which you can access on the **Profile** menu.
- OpenText Content Aviator and sensitivity labels from Microsoft Purview Information Protection are now configured in Admin Console. For more information, see *OpenText Documentum Content Management - Content Aviator Administration Help* (EDCADC-H-AAV) and *OpenText Documentum Content Management - Microsoft Integrations Administration Help* (EDCADC-H-AIN). Warnings might appear on the Landing page if the Content Aviator or MIP tile configuration has not been removed in client configuration. If this is the case, contact your administrator.

Admin Checked Out Documents

The **Admin Checked Out Documents** tile functions like the common **Checked Out Documents** tile, but allows you to unlock items that belong to other users. Your administrator controls which additional items you can unlock and if you are required to add a comment. The tile might have a different name in your environment.

For more information, see [“Checked Out Documents” on page 10](#).

Admin Workflows

The **Admin Workflows** tile functions like the common **Workflows** tile, but allows you to make changes to workflows that belong to other users. You can perform the following actions on workflows:

- Pause
- Resume
- Change Supervisor
- Abort

Your administrator controls which workflows you can modify, which additional actions you can take, and if you are required to add a comment. The tile might have a different name in your environment.

For more information, see [“Workflow actions” on page 82](#).

1.2 Navigation

Common elements on the Landing page header



Note: Some of the elements described below might not be supported in your Smart View configuration.



Profile Menu

- Access your **User settings**, including your user profile image (see [“User settings” on page 17](#) for more information).
- Open **Help**, **Sign out**, and click **About** to view information about the versions of installed components.
- Access other [Landing pages](#). For example, you might have access to the **Reports** Landing page, which provides access to the [Reports](#) feature.



View items marked as favorites. All items marked as favorites appear in this list.



Show or hide breadcrumb trail

Show or hide the breadcrumb navigation. Depending on header configuration by your administrator, this trail might not be visible. The breadcrumb trail shows a nested view of how you navigated to the current item.



Search

Perform a simple search of the whole repository. If visible, click to expose the **Search** field, type a search term, and then press **ENTER**.



Collections

View the list of collections and perform actions on their content. The

Collections button  on the header appears only if it is configured by your administrator.

For more information on collections, see [“Collections” on page 63](#).

1.2.1 Keyboard shortcuts

Smart View supports keyboard shortcuts to provide users with an alternative way to perform functions that are normally performed using a mouse.



Note: For some functions, keyboard navigation might change to Mouse Keys, which allow you to use the numeric keypad on your keyboard to move the pointer.

Table 1-1: General keyboard shortcuts

Shortcut	Action
TAB	Moves to the next interactive item.
SHIFT + TAB	Moves to previous interactive item.
Left arrow	Moves to the previous item in a menu or list, or leaves the menu.
Right arrow	Moves to the submenu.
Down arrow	Moves to the next line in a list or menu, or to the next entry if there is no submenu.
Up arrow	Moves to the previous line on a list or menu. For tables, moves to the previous item in the same column.
ENTER	Applies the edit mode to fields. For buttons or menus, runs the associated actions.
SPACE	Activates fields such as check boxes and radio buttons.
ESCAPE	Closes a list and leaves edit mode.

Table 1-2: Dialog box or overlay keyboard shortcuts

Shortcut	Action
TAB	Moves to the next interactive item.
SHIFT + TAB	Moves to the previous interactive item.
Left arrow	Moves to the previous item.
Right arrow	Moves to the next item.
Down arrow	Moves to the same position on the next line.
Up arrow	Moves to the same position on the previous line.

Table 1-3: Tree view navigation in a Doclist or virtual document outline

Shortcut	Action
ENTER	Selects a node and displays its contents in the right-hand pane, or activates Show more or Show less controls.
Left arrow	Collapses a node to hide sub-items.
Right arrow	Expands a node to access sub-items.
Down arrow	Moves to the next item in the tree view.
Up arrow	Moves to the previous item in the tree view.
HOME	Moves to the top of the tree view.
END	Moves to the bottom of the tree view.

1.3 Basic actions

This section describes the basic actions that can be performed on Smart View.

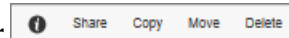


Note: Some of the operations might not be supported by your Smart View configuration.

Action Bar

When you select one or more items in a selected tile or folder, the functions you

can perform on those items appear in the **Action Bar** above the items. The **Action Bar** is useful when you want to perform the same action on multiple items.





The options that appear might vary depending on the tile or folder, or your configuration. The most common functions are: **Copy link**, **Copy**, and **Share**.



Note: The ability to share multiple items through email is limited. If an error message appears, limit your selection and try again. You might need to split the share operations across multiple emails.

Inline Action Bar

When you are in a folder, items in the folder are displayed in a list format referred to as a *Doclist*. When in a Doclist, pointing to an item displays a group of buttons on a toolbar referred to as the **Inline Action Bar** . The **Inline Action Bar** displays functions that you can perform on the item, and the functions that appear depend on the item and your permissions on that item. Some additional functions might be available by clicking the **More actions**

button  at the end of the **Inline Action Bar**.

Common elements in Doclists



Show repository tree

Click the **Show repository tree** button to turn on the tree view navigation interface. Click > to expand a node and access the first five sub-items. Click a node to display its contents in the Doclist's right-hand pane.



Show filters

Click the **Show filters** button to show and hide the **Refine by** pane.

Filters appear at the top of the pane, with facets below. Filters appear only for Doclists and collection pages, and are configured by your administrator.



Search


On the Landing page header, search might be configured so the **Search** field always appears, or you might need to click the **Search** button to enter your term. From the Landing page, you can perform a simple search that searches the entire repository. Details of the search methods are configured by your administrator.

Within tiles and other containers, you can perform a simple search to quickly locate items within that location by clicking the **Search** button in the header



and typing the name or partial name of an item you want to find. You can search your current locations or sub-locations, or the whole repository.

Once you have performed a search, you can search the entire repository or within your current results. In the results list, you can select single or multiple items to **Share** (through emailed links), **Copy Link**, **Download**, **Print**, or more.

You can also filter content in a Doclist by clicking the  **Search in** buttons at the top of some columns. Enter text in the fields that appear to restrict which items appear in the list. To further restrict which items appear in the list, you can use wildcards, which are special characters that stand in for unknown characters. Smart View supports the following wildcards when filtering items in a list:



- * matches any number of characters and can be used anywhere in a string of text.

For example:

- *on finds any filename that ends with on, such as **action**.
- on* finds any filename that starts with on, such as **ontario**.
- o*n finds any filename that starts with o and ends with n, such as **open**.
- ? matches a single character and can be used anywhere in a string of text. It works like *, but only with a single character.

For example, ?on finds any three-letter filename that ends with on, such as **won**.


★ Favorites

Click the **Add Favorite** button  to add a favorite, or click the **Remove Favorite** button  to remove the item as a favorite.




▼ Show more

In a Doclist, click the **Show more** button  at the end of an item's row to expand the row and show item details.




▼ Command



Click the **Command** menu  beside the item title to view the **Properties** page, or perform other available functions for the item or container. Depending on your permissions, you might also be able to copy, move, or delete the item, or share or copy the item's link.

↑ Sort

 Click the **Sort ascending** button  or **Sort descending** button  to sort the columns alphabetically, by date, or by size.



⚙ Settings

- **View modes:**
 - **List:** Shows the content of a folder in a list view. If the window showing the list is minimized, press the down arrow button to access information that does not fit in the list.
 - **Pinned columns:** Shows the content of a folder in a list view with resizable columns. Resize the columns by pointing to the header between two columns and dragging the arrows. If the window showing the list is minimized, use the scroll bar to see all the rows of information. Point to the right of a column header and click the **More actions** button  to access additional functions: **Sort ascending**, **Sort descending**, **Minimum width**, and **Fit to content**.
 - **Grid:** Displays a thumbnail gallery of content. Point to a thumbnail to show the selection check box for the item and the **More actions** button . To add a comment to the item, click the **Comments** button . To

add the item to favorites, click the **Add Favorite** button . To view more details about the item, click the **Metadata** button .



Note: The default view mode is configured by the administrator. Whichever mode you choose overrides this setting and remains the selected mode until you change the setting or clear your browser's cache.

- **Column settings:** Rearrange the order of the columns in the Doclist by dragging the column names in the **Columns Settings** list. Point to a column name and click the **Remove** button  to remove the column from the Doclist. Click the **Add** button  to select a new column and add it to the Doclist.
- **Show markup status:** Turn this switch on to indicate in a Doclist or search results the documents that have OpenText™ Intelligent Viewing markup associated with them. If a document has markup, a status icon appears in a status/count column. Point to the icon to view the number of associated markups. For more information, see [“Open content in a viewer” on page 35](#).



Note: The option is available only if Intelligent Viewing is the default viewer. The option is not available if the view mode is **Grid**. The status/count column does not appear if none of the listed documents has associated markup.

- **Show workflow status:** Turn this switch on to indicate in a Doclist the documents that have one or more workflows associated with them. If a document has workflows, a status icon appears in a status/count column. Point to the icon to view the number of associated workflows. Click the icon to view the associated workflows in the **Workflows** list. For more information, see [“Navigate workflows” on page 80](#).

1.4 User settings

You can change certain user settings within your user profile to personalize Smart View's behavior and user interface.

On the **Profile Menu**, click **User settings**.



Note: Some of the settings described here might not be supported or might be restricted in your Smart View configuration.


User profile image

By default, your user profile image appears as your user initials, but you can replace these with an image from your computer. Images must be 5 MB in size or smaller. Standard image formats such as BMP, JPEG, JPG, PNG, GIF and SVG are supported, but can be limited by your administrator.



Note: The image that you select is also used in your Mobile and Admin Console profiles.

If you are selecting an image for the first time, in **User settings**, click the circle with your initials and choose an image from your computer.

If you want to change an existing image, position your pointer over the profile image, click , then click **Upload Picture** to select a replacement image, or **Delete Picture** to remove the current image and return to user initials.

Add-on

Turn on the **Enable Documentum Client Manager** switch to install and use the Client Manager add-on, which includes enhanced convenience features. Your administrator might restrict access to this switch, which means Smart View will use the add-on mode that the administrator defines.

When the add-on is off, or if you have not updated the add-on when a new version is available, Smart View is in Thin mode and features rely on browser capabilities.

When you turn on the **Enable Documentum Client Manager** switch for the first time, an installation banner appears at the top of your screen. Click **Install**.

When the add-on is installed correctly, you can click the ? button to show the version number.



Note: The Client Manager add-on is updated periodically when you log into Smart View. An upgrade banner appears at the top of your screen when a new version is available. Click **Upgrade**.

Location path

If you have installed the Client Manager add-on, provide the locations on your local machine where you can save content for temporary viewing and checkout storage.

Point to the **Temporary path** or **Checkout path** field and click the **Edit** button



to edit the paths.

Sort options

Turn on the **Enable grouping of folders before files** switch to enable Smart View to sort and group Doclist folders first, followed by files.

Last navigated path

Turn on the **Enable last navigated path** switch to enable Smart View to store your last location in a Doclist. When you return to the Doclist, Smart View automatically takes you to that location. The last location is stored until you clear your cache.

Accessibility

Turn on the **Accessible compliant mode** switch to improve the usability of accessibility aids such as screen readers. Turning on this mode configures the user interface in the following ways:


- Turns on persistent pop-up messages.
- Turns on browser's default scroll bar.
- Turns on fixed horizontal column view in list views.
- Turns off the **Inline Action Bar**.
- Displays share and state columns in Doclists.
- Displays a summary column in search results.
- Opens items in full viewer mode regardless of menu configuration.
- Turns on Accessible compliant mode in OpenText™ Brava!™ Enterprise and OpenText™ Intelligent Viewing.
- Turns off the item preview page and adds an open item button on the property, virtual document, and task item pages. The button opens the item in full viewer mode.



Note: When Accessible compliant mode is turned on, annotations in OpenText Brava! Enterprise viewer and OpenText Intelligent Viewing are not available.



Language

By default, the language of Smart View is set to your web browser language. To change the language, point to the **Default language** field and click the **Edit**

button . Changes to this setting take effect when you close Smart View and log back in.

Date and Time

Use this setting to select the display format of date and time values. Point to the


Display Format field, click the **Edit** button , select a format from the list, and then click . If a value does not include the time, only the selected date format is displayed.

Quick access to task attachments

In the **Task Details** view, you have the option to work with tasks in context. In this mode, the focus of the view is task content, and content information and actions can be accessed quickly and easily while staying within the context of the task. For more information, see [“Work with tasks in context” on page 87](#).

To switch to this mode, turn on the **Quick access to task attachments** switch.



Note: After you change a setting, a **Refresh to view the changes** message appears. Click  to reload Smart View and have the change take effect.

Chapter 2

Content management

OpenText Documentum CM handles three types of content:

- *Cabinets* are folders located at the highest level of the repository.
- *Folders* are containers for content and organize the repository.
- *Files* can be of any format type and include applications, scripts, video files, audio files, and documents.



Note: If a **Lock** icon appears beside the **Name** of the content in the Doclist, it is checked out for editing either by you (🔒) or another user (🔒). Point to the **Lock** icon to see which user checked out the content.

2.1 Content actions

This section describes the actions you can perform on content items. Point to an item and click the action on the **Inline Action Bar**. You might need to click the **More actions** button "...". In most cases, you can perform these actions on multiple items at once by selecting the items and clicking the action on the **Action Bar** above the item list.



Note: Some of the actions might not be supported depending on your permissions and your Smart View configuration.

View content

Click a content item. The item opens in the appropriate viewer or a local copy is downloaded. Alternatively, you can click **View Native Content** in the menu to ensure you download the item in its native format.

If configured by your administrator, you can open an item in an in-place viewer by pointing to the item and clicking **View** on the **Inline Action Bar**.

Maximize the in-place viewer to interact with annotations and Changemarks in the item.

Open content in a new window


Point to an item and select **Open in a new window** to open the item in a new browser window.


This option can also be configured to open the item in a new window with a specific viewer.



Tip: You can save or share the URL of this window for easy access to this item.

View content properties


Point to an item and click **Properties** .

Depending on the item, a preview might appear. Click  to display the preview if it is closed.

To view the properties of a folder, click  beside the folder name, then click **Properties**.

Scroll through the **Properties** page or click the sub-headings at the top of the page to navigate to the different sections.

Copy link

Point to an item and click **Copy link**  to copy a link to the item to the clipboard. To copy links to multiple items, select the items and click **Copy link** on the **Action Bar**.


When you click a copied link, an **Overview** page opens. Click **Open** to open the item in a viewer, or download it if the type is not supported.

You can also copy a link to an older version of an item. Click the **Show filters** button  and click **All versions** under **Filter** in the **Refine by** pane first.

When you click a link to an older version of an item, an **Overview** page also opens. Note, however, that the page is for the *current* version of the item, so clicking **Open** opens the current version of the item. To open the older version of the item, click the **View original** link, which includes the version number.

Depending on your configuration, clicking a link to the current version of an item might open the item directly in a viewer. In addition, clicking a link to an older version of an item might open an **Overview** page for that older version instead of for the current version. Clicking **Open** in the page opens that older version of the item. If you want, you can also open the current version of the item from the page by clicking the **View current** link.

Share content externally

Point to an item and click **Share**  to:

- **Email:** Copy a link to the item into an email.

Notes


- The ability to share multiple items in the Doclist through email is limited. If an error message appears, limit your selection and try again. You might need to split the share operations across multiple emails.
- For more information on the behavior of an email link when clicked, see [Copy link](#).
- Select the check box next to an item to access the **Share** sub-menu, which contains more sharing options:

- **OpenText Core Share:** Share selected items to OpenText Core Share.
- **Manage share:** Manage the permissions and other rules for sharing the selected item.
- **Stop share:** Stop sharing the selected item.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

See [“Share content with external services” on page 60](#) for more information.


Print

Point to an item and click **Print** . In some cases, an overlay or watermark appears on the output.



Note: In the Thin content transfer mode, the item is downloaded by your browser so you can print it later.


Edit online


Point to an item and click **Edit online** . The item opens in a Microsoft 365 app where you can edit it. In addition, other users can also open the item and make changes alongside you. Changes are checked in automatically when all editing users have closed the item.

This option only appears for files that you can edit in Microsoft 365 and requires that Microsoft 365 online editing and co-authoring has been configured.

For more information see [“Edit and co-author in Microsoft 365” on page 51](#).

Check out content

Point to an item and click **Checkout** . If configured in your environment, you might also be able to check out the item by clicking **Edit**. If any business rules prevent or require your confirmation, a dialog box appears. Otherwise a message appears at the top of the page notifying you of the success or failure of your item checkout.

A blue lock icon  appears next to the item in the Doclist to indicate that the content is currently locked by you.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.



Note: When you check out an item, it is automatically downloaded to your default download directory.

Check in content

Point to an item you currently have checked out and click **Check in** to check in the item (with any changes you have made). You are prompted to upload a new version of the item and, in some cases, a pane appears asking you to update item and version properties.

A message appears on the header notifying you of any special checkin messages and the success or failure of your item checkin.


Cancel checkout

Click a checked out item's blue lock icon  or point to the item and click **Cancel checkout** to cancel your checkout without committing any changes.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.


View permissions

Point to an item and click **Permissions** to open the **Permissions** page. Or, when

viewing the **Properties** page of an item, click the **Down Arrow** button  and select **Permissions**.

The page shows your permissions on the item, extended permissions, and the item security name. Point to a permission to see full permission details. Enter the name of a user or group to look up their permissions.

Add a new version

Point to an item and click **Add Version**  to add a new version of the item. The current version is locked and you are able to browse for a new version of the item. When you select the new item, a dialog box might appear asking you to describe the version you are adding, including the new version number, and to decide if the new version should be considered the current version. When the new version is uploaded, the item is automatically checked in.


Alternatively, you can drag a new version of an item directly from your computer to the current content in a Doclist.

A message appears on the header notifying you of the success or failure of your version upload.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

The following operations cannot be performed on the item until the **Add version** process completes: delete, cancel check out, and lifecycle state change.



Tip: To view all versions of an item, click the **Show filters**  button and click **All versions** under **Filter** in the **Refine by** pane. To view a summary of the item's versions on the **Versions** page, click any of the item's version numbers in the **Versions** column.

Download content

Point to an item and click **Download**  to download a copy to your computer.

To create and download a ZIP file of multiple items, select the files and folders you want to download and then click **Download**. A dialog box appears that allows you to rename the ZIP file and add an encryption password. It also lists any files that could not be added to the ZIP file because of your configuration. If the list is large enough, you can copy the list of excluded files to your clipboard in CSV format.



Notes

- Depending on your configuration, you might have limits on the number of files, file types, or maximum total file size that you can download.
- You cannot download empty folders.
- When you download a folder, sub-folders are not included unless you select the **Include all Subfolders** option.
- Depending on the size of the ZIP file and the number of files included, Smart View might need time to process and create the ZIP file. When the ZIP file is ready, it will begin to download.
- Zipping and downloading is a background process, so you can refresh or navigate to other pages without interruption. You can create and download only one ZIP file at a time.
- Files with PDF configuration are processed before being added to the ZIP file.
- The ZIP file includes a CSV manifest file that lists all the files and folders contained in the download.

Export file and folder properties

The **Export properties** option allows you to download a CSV manifest file that lists all the files and folders that you select. The file includes all the column details you have added to the current list.

To download a properties file, select one or more files and folders and then click **Export properties**. You can also select files from search results.

If you select only files, the download begins immediately. If you select a folder, a dialog box appears allowing you to select **Include properties for sub-folders**.

View content renditions

Select an item and click **Renditions** to open the item's **Renditions** page. Or,

when viewing an item's **Properties** page, click  and click **Renditions**.

On this page, you can view a list of any different formats available for a content item. For example, an item that is a Microsoft® Word document might have a rendition that is a PDF version of the file. Depending on a rendition's format, you can click it to open it in a viewer.



Note: Annotations are not available when viewing a rendition in OpenText™ Intelligent Viewing.

Point to a rendition to display the **Inline Action Bar** or select one or more renditions to display the **Action Bar**. The options on the bars allow you to perform actions, such as export a rendition and delete a rendition.

Import rendition

To import a rendition of an item, point to the item, click **Import rendition**, and select the file to import. The **Format** list in the **Add rendition** dialog box is automatically populated. If available, you can choose a different format from the list. You can also select a different file to upload from the **Upload from file** field. To import the rendition, click **Add**. To view the new rendition on the **Renditions** page, click the **Go to renditions** link in the **Renditions uploaded** message that appears on the header.



Notes

- Each version of a content item can have its own set of renditions.
- If the format of a new rendition is the same as that of an existing rendition, the existing rendition is replaced with the new one.

View content locations

Select an item and click **Locations** to open the item's **Locations** page.

Alternatively, when viewing an item's **Properties** page, click  and select **Locations**.

On this page, you can see where the item is located in the repository and if it is included in any virtual documents. Click an item to go to the location.

Point to a location to display the **Inline Action Bar** or select one or more locations to display the **Action Bar**. The options on the bars allow you to perform actions, such as view properties.

Export content locations

When viewing a content item's locations in the **Locations** page, you can export and download the locations as a Microsoft® Excel® spreadsheet (.xlsx).

To export the locations, click the **Export** button on the **Locations** page. In the **Export list** dialog box, enter a **Name** for the file and click **Export**.

All of the item's locations are exported, including virtual documents. Each location in the spreadsheet includes the path, the type of location (**Folder** or **Virtual document**), and a link to the location in the repository.

Work with content versions and relations

When viewing the properties of a content item on the **Properties** page, click



next to **Properties** and select **Versions** (all the item's versions) or **Relations** (a list of the items that are related to the item).

On the **Versions** or **Relations** page, point to an item to display the **Inline Action Bar** or select one or more items to display the **Action Bar**. The options on the bars allow you to perform actions, and the actions that are available depend on the item and your environment's configuration.

For more information about relations, see ["Content relations" on page 61](#).

Copy and paste content

Point to an item and click **Copy** . Navigate to the destination folder, click



, and then click **Paste**.



Note: In some cases, pasting content from one location to another prompts Smart View to launch the create new content workflow, where need to describe the content.

Delete content

Point to an item and click **Delete** . You can delete cabinets, folders, and documents if you have the right permissions. You cannot delete checked out files.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.



Note: Depending on your configuration, Smart View stores items that you have deleted in a recycle bin. For more information, see ["Recycle bin" on page 58](#).

Comment on content

In a Doclist or search results list, click . Type your comment, then click **Post**. You can add comments at the folder or file level.

Click **Reply** under an existing comment to reply directly to that comment.

Favorite content

In a Doclist, click . You can add folders or files as favorites.

Import file from

Point to an item and select **Import File From** to launch the import process using the selected item as a model. See ["Inherit from existing content to create or upload" on page 56](#) for more information.

Create file from

Point to an item and select **Create File From** to launch the content creation process using the selected item as a model. See [“Inherit from existing content to create or upload” on page 56](#) for more information.

View a virtual document or a virtual document snapshot

Point to a virtual document or a virtual document snapshot and select **Display outline** or **Display snapshot**. See [“Virtual documents” on page 69](#) for more information.

Convert content to a virtual document or convert a virtual document back to content

Point to an item and select **Convert to Virtual Document**. Virtual documents can be converted back to simple files by selecting **Convert to simple document**.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

See [“Virtual documents” on page 69](#) for more information.

Create a snapshot of the virtual document

In a Doclist or in the virtual document tree, point to a virtual document and click **Take a snapshot**. If necessary, edit the default **Title** of your new snapshot and click **Save**. See [“Virtual documents” on page 69](#) for more information.

Create content relation

In a Doclist, point to an item and click **Create relation**. In the **Create Relation** pane, choose a relation type from the **Select relation** list, then click **+** to choose one or more items to add to the relation. Click **Add**. Type a **Comment** that describes the relation, then click **Create**. If you need to, you can remove a selected item by pointing to it and clicking **×**.

See [“Content relations” on page 61](#) for more information.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Send content to a workflow

In a Doclist, point to the document you want to send to the workflow and click **Workflows > (Name of your workflow)**. If you need to select multiple items, click the check boxes beside the items and click **Workflows** on the **Action Bar**.

See [“Workflows” on page 78](#) for more information.

View a document's workflows

Point to a document that is associated with a workflow and click **Workflow History** or **View Workflows** (your environment might have a different name). The **Workflows** list opens displaying the document's associated workflows.

If the **Show markup status** switch is turned on in **Settings**, a status icon appears in a Doclist for documents that have workflows associated with them. Point to the icon to view the number of associated workflows. Click the icon to view the associated workflows in the **Workflows** list.

Send content to a lifecycle state


In a Doclist, navigate to the item you want to send to a lifecycle state, then point to the item and click **Lifecycle > (Name of your Lifecycle state)**.

See [“Lifecycles” on page 95](#) for more information.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

View content audit report

Point to an item and click **Audits** to open the item’s **Audit** page. Or, when

viewing the **Properties** page of an item, click  and select **Audit**.

The audit report records events that occur to an item. Your administrator configures which events are recorded, which can include when an item is created, opened, or modified, or if its attribute values have changed. The audit report includes details about the event, such as who performed it and when it occurred. You can view the audit report only if your administrator provides you access.

Export audit report


When viewing a content item’s audit report in the **Audit** page, you can export and download the report as a Microsoft® Excel® spreadsheet (.xlsx).

To export the report, click the **Export** button on the **Audit** page. In the **Export list** dialog box, enter a **Name** for the file and click **Export**.

Apply a retention policy

A retention policy retains one or more items, such as cabinets, folders, and documents, according to conditional or chronological settings, or a mix of both, using lifecycles. It can protect documents from potential or inadvertent deletion and force them to undergo aging in a controlled manner.

In a Doclist, select one or more items and click **Apply retention policy**. In the **Select retention policy** panel, select a retention policy. To edit an event, in the

Global Events table, point to an event and click **Edit** . In the **Edit Event** dialog box, you can update **Event Description**, **Event Date**, and **Event Message**. Click **Add** to select the contacts whom you want to be notified about the event. Click **Yes**. Click **Next**. In the **Review phases** panel, review the settings configured for each phase of the policy and click **Apply**. If you need to modify any of these settings, contact your administrator.




Note: To access the retention policy menu options for a selected document, you must have the RELATE permission on the document.

Apply retention markups

A retention markup is a tag that is applied to a content item to prevent any further action or processing on the item.

In a Doclist, select one or more items and click **Apply retention markup**. In the

Apply retention markups panel, click  in **Retention markups**. In the **Select retention markups** dialog box, select one or more markups and click **Select**. Type a reason in **Reason for applying markup** and click **Apply**.

View retention policy

In a Doclist, select an item and click **View retention policy** to open the **Retention policies** page. To remove a policy, select the policy and click **Remove**.

View retention markups

In a Doclist, select an item and click **View retention markup** to open the **Retention markups** page. To remove a markup, select the markup and click **Remove**.

2.2 Search

You have several options for searching content.



Note: Search results include only the first 1,000 items. If your results return more than a 1,000 items, a warning appears and suggests that you refine your search parameters.

Header search

Use the **Search** field in the Landing page's header to perform a full-text search of the repository. If you are within a folder, the header search function asks you if you want to restrict your search to the current location and its sub-folders.

Saved search

The **Saved Searches** tile allows you to access repository search queries that you or others have saved. The queries are grouped within the tile for easy identification.

Advanced search

Advanced search allows you to create a more complex query using file location, properties, and full-text options. You can also customize the appearance of the search results. You can access advanced search from the header search option or from a search tile.

Doclist column search

Some Doclists include **Search in** icons at the top of key columns that allow you to perform simple searches on the data in the column.





Query form search


Specialized tiles can be added to the Landing page that launch a search configured by administrators with a specified set of input properties. Query

form searches display a content property page as a form for user search specification.

2.2.1 View search results

The **Search Results** page appears with the items returned by your search.

- By default, 10 items are shown per page, with the option at the bottom-left of the screen to increase that number up to 100.
- To select the column to sort on, click  and select the column in the list. To toggle between ascending and descending order, click the up/down arrow next to it or next to the column name.
- Click  to show or hide content descriptions in the list.
- By default, search results are displayed in List mode. To display results in Pinned column mode, click the **Search Settings** button  and click **Pinned columns**. When displaying results in Pinned column mode, you can resize columns by clicking and dragging the column dividers.
- If filters are configured, you can filter the results by clicking the **Show filters** button . Using the **Refine by** pane, you can narrow search results by searching on or selecting from one or more filters. For example, to view only items modified in the last month, select **Last Month** in the **Modified** filter.

To close the **Refine by** pane, click the **Show filters** button  again.

2.2.2 Advanced search

Advanced search allows you to search the repository using complex search criteria. To access advanced search, click the **Search** field and then click **Advanced search** to open the **Advanced search** pane. Any options you select in the search drop-down are carried into your advanced search options.

You can also access advanced search options through various **Search** or **Saved Search** tiles. Depending on how an advanced search was configured, you might be prompted with advanced search options when running a saved or previous search.

The options available on the **Search Panel** are described below. After configuring the search options, see [“Perform a search after configuring the advanced search options” on page 33](#).



Note: Some of the options might not be supported depending on your Smart View configuration.

Save

Search name

Enter a name for the saved search (required).

Save in

Click the folder button to open the **Save in** dialog. You can select where to save your search.

Point to a folder and click the plus button to create a new folder under the selected folder. If you create a folder in a public search folder, you can select which roles have access.

After you select a folder, click **Select**.

Display advanced search form before running

Select this option to prompt the advanced search pane to open before the saved search runs.

You cannot edit this option for a saved search unless you save it as a new search.

Types

Types

Use this option to select which object types to search. This list is configured by your administrator.

Click the button on the right side of the field to toggle between the list of available **Types** and selected **Types**.

Search

Full-text search

Select how to search using your search terms:

- **Containing all words:** Search for results that contain all of the words that you enter, but not necessarily in the exact order.
- **Containing any words:** Search for results that contain any of the words you enter.
- **Containing exact sentence:** Search for results that contain the exact string of characters that you enter.
- **Without any words:** Search for results that contain none of the words that you enter.

Property search

Create a query using item properties. Queries use properties, conditions, and values to narrow down search results. To create a query, select a property, then a condition, and then enter a value. The value must be enclosed in quotation marks.

Depending on which properties you select, different conditions and values are available.

If full-text search is turned off, select **Case sensitive** to make your property search case-sensitive.



Notes

- When entering text in the **Property in** field to find properties, conditions, or values in the list, spaces are not recognized and only text you enter before the space is searched.
- On touch devices, after selecting a date in the date picker, the date picker does not close automatically. To close the date picker, tap outside the **Property search** field.

Search in

Select the directory to search. Click the folder button to open the directory dialog. From here, you can navigate the repository directories from your **Current location** or from your list of folder **Favorites**.

When adding directories to search, you can select multiple folders in the same directory. To add folders from another directory, click the folder button again and navigate to the other folders you want to add.

Search options:

- **Include sub folders:** Include sub-folders in the search.
- **Include all versions:** Include previous item versions in the search.

Display

Columns

Select which data columns to display with the search results.

Sort by

Select the columns to sort by.

Facets

Select which facets to display. The list of facets is configured by your administrator.

Facets represent one or more important characteristics of an object. You can use facets to search large data sets without explicit queries to avoid queries that do not return useful results.

Perform a search after configuring the advanced search options

After configuring advanced search options, you can perform the search by clicking **Search** or save the search by clicking **Save**. After running the search, you can:

- Further customize the search and run it again.

- Click **Save** to save the search if you have not saved it or if you made changes since running the search.
- Enter a new name and click **Save as** to save a new version of the search.



Note: If you save an advanced search in Smart View then modify it in Classic View, some of those modifications might not appear in Smart View.

You can access saved and public searches from **Search** tiles on the Landing page. You can also click the expand button on these tiles to open the **Searches** page, which contains a list of all your saved and public searches.

2.2.3 Searches page


The **Searches** page lists all your saved and public searches, grouped by category. Categories are listed on the left-hand side and can include multiple sub-categories. When you select a category, all sub-categories and searches saved under that category are listed on the main page.

You can perform the following tasks from the **Searches** page:

Run a search:

1. Point to a search.
2. Click **Run**.

Edit an Advanced search:

1. Point to the search and click **Run**.
2. If the advanced search was saved as a form, the advanced search options appear. Customize the search as needed.
3. If the advance search was not saved as a form, the search results appear. Click the  button in the top-left to open the advanced search options.
4. To save your changes, click **Save** or change the name and click **Save as** to create a new saved search.



Note: If you modify a saved search in Classic View that was created or modified in Smart View, those changes are not reflected in Smart View.

Add a category:

1. Select where you want to create a new category. You can select the top-level of your saved or public searches, or a category under either.
2. Enter a name.
3. If you are creating a category for a public search, select who has access to the searches saved in this category. Leave it blank to allow all users access.


4. Click **Add**.

Rename a category:

1. Open the category you want to rename.
2. Click the name at the top of the page.
3. Enter the new name and click the check mark.

Move a search or category:

You must have permission to edit public searches or to move them.

1. Select the searches and categories you want to move and click **Cut**.
2. Open where you want to move the searches or categories.
3. Click  next to the page title and then click **Paste**.

Delete a search or category:

You must have permission to edit public searches to delete them.

1. Select the searches and categories you want to delete.
2. Click **Delete**.
3. If you are deleting a category, select **Delete category and all its content** to delete sub-categories and searches. If the category is not empty, you must select this option to delete the category.

2.3 Open content in a viewer

When you click a content item, it opens in a viewer. If the item's file type is not supported by your viewer, you are prompted to download it. When prompted to download an item, select the option to save your preference to skip this message in the future. To change this preference, delete your browser's cached data.


Several viewers are available for use in Smart View, and are configured by your administrator. BravaCSR is the default viewer, but other viewers are available, such as OpenText Brava! Enterprise viewer and OpenText Intelligent Viewing. These viewers feature advanced support for video and 3D files, as well as tools like content redaction and measurement. Contact your administrator to determine which viewer is available to you.


**Caution**

When you open a content item in OpenText Intelligent Viewing, any annotations in the item (existing or new) are migrated to OpenText Intelligent Viewing. If you open the item in BravaCSR or OpenText Brava!

Enterprise at a later time, the annotations feature will be turned off and you will not be able to edit or create annotations.

If configured by your administrator, you can open content in an in-place viewer by pointing to content and clicking **View** on the **Inline Action Bar**. Maximize the in-place viewer to interact with annotations and Changemarks in the content.

Documents with multiple pages have thumbnails available for quicker access to a specific page. Click the **Toggle panel** button  to show or hide the page thumbnail views. The viewer provides additional tools for viewing certain file types.

Click the  icon in the viewer header to close the viewer and return to Smart View.

2.3.1 Use BravaCSR viewer

BravaCSR is the default Smart View viewer. The icons described below are available when using BravaCSR viewer.

General icons



Selection

Click to select the pointer selection mode of the viewer: **Native text select**, which allows you to select text in a document, **Pan the page**, which allows you to move the page around the screen, and **Zoom region**, which allows you to zoom a rectangular selection area on the page.



Export Document

Download the item you are viewing to your local machine.



Zoom Out/Zoom In

Zoom in or out on contents of the window.



Fit All

Reduce size to fit entire page into the window.



Fit Width

Fit contents to width of the window.



Toggle Full Screen

Switch the viewer to full screen mode, which hides the browser header.



Print

Print the current item. In some cases, an overlay or watermark might appear on the output.



More

Show more viewer functions such as **Rotate page** and **Page display settings**.








Search

Perform a search of the current item by entering a search term.

Annotation icons






You can add various annotations, comments, and drawings to content in the viewer if you have edit rights to the item. Select **Annotation**, **Changemark**, **Drawings**, **Lines**, or **Stamps** from the list in the viewer toolbar.

Click the **Select** button  to select and edit an annotation on the page.

-
- | | |
|---|--|
|  | Add Arrow
Draw an arrow. Select the point where you want the arrow to begin, then drag and release to where you want the line to end. |
| <hr/> | |
|  | Add Text
Place text directly on the page. Select a point on the document where you would like the text to begin, or drag a rectangle where you would like the text area to be located. |
| <hr/> | |
|  | Add Bookmark
Set one or more custom bookmarks. |
| <hr/> | |
|  | Refresh Markup
Reload the markups for this document to see new updates. |
-

Changemark icons

The Changemark™ feature allows authors of markups to assign a placeholder and descriptive text or a hyperlink to a particular markup. All Changemark notes contained in the opened markup files appear in the Changemark pane.

-
- | | |
|---|--|
|  | Add Changemark
Place a single Changemark note. Draw the shape on the page by selecting a location point. A Changemark note of default size (50 pixels) is created at that location. Type your note text. |
| <hr/> | |
|  | Add Changemark and Highlight
Create two entities at a time: a Highlight and a Changemark note. Select the starting point where you want to highlight and drag to the point where you want to stop. |
| <hr/> | |
|  | Add Changemark and Cloud
Create a cloud drawing and a Changemark note. |
| <hr/> | |
|  | Add Changemark and Arrow
Create an arrow drawing and a Changemark note. |
| <hr/> | |
|  | Add Checkview
The Checkview feature allows authors of markups to assign a placeholder and descriptive text in a markup template to be later reviewed for completeness. The template is later used on a class of documents to be reviewed and verified with greater efficiency.

All Checkview tags contained in the opened markup files can be sequentially reviewed in the Checkview tab. |

To place a Checkview tag on the lines of the document (usually a form) that you want reviewers to verify (such as whether the document has been signed), drag a rectangle around the location to which you want to draw the reviewer's focus. The document area outside of the rectangle appears with an overlay, bringing focus to the area highlighted within the Checkview entity.

Drawing icons

Add Shapes

The drawing group includes markup tools that can be drawn on the current view. These include a cloud, highlight, rectangle, rounded rectangle, ellipse, polygon, sketch, and sketch polygon tool; some of which can be filled or unfilled shapes.



Add Sketch

Draw freehand shapes.



Add Polygon Sketch

Create filled freehand shapes.

Lines icons

Add Lines

The Lines group includes markup tools that can be used to draw straight or polygonal lines on the current view. It also includes the Crossout and Scratch out tools, which can be drawn on the image. Unlike the Drawing group, entities from the Lines group cannot be filled.



Add Sketch

Draw freehand shapes.



Add Polygon Sketch

Create filled freehand shapes.

Stamps icons



Add Stamp

Use this tool to insert external images (JPG, GIF, or PNG) into your current markup layer. Once selected, images can be re-sized and positioned where you want them.

2.3.2 Compare files

If your administrator has configured Smart View with OpenText Brava! Enterprise or OpenText Intelligent Viewing, you can compare two files in the viewer and see the differences between them. Text and graphical comparisons are supported.



Note: Video and audio format files (for example .mp3, .mp4, F4V, .MOV, .m4v, .mpeg-4v, .3gp, .dat) are not supported for comparison.

Compare two files in the same repository location:

1. Navigate to the location in your repository where the two target files are saved.
2. Select the check boxes next to the files.
3. In the menu, select **Brava! Text Compare** or **Brava! Graphical Compare** or **Text Compare** or **Graphical Compare**, depending on the viewer. The exact names of the menu items might be different in your configuration of Smart View.



Note: Depending on the type of file you select, only text or graphical comparisons might be available. In some cases, both comparisons might be supported. For example, if you select two PDF files, you might be able to compare both text and graphics as separate operations.

Compare two files in different repository locations:

1. Navigate to the location in your repository where the first target file is saved.
2. Select the check box next to the file.
3. In the menu, select **Compare With**. The exact name of the menu item might be different in your configuration of Smart View.
4. Select the second file using the **Compare With** window, which allows you to navigate outside of your current repository location.
5. Click **Brava! Text Compare** or **Brava! Graphical Compare**, or **Text Compare** or **Graphical Compare**, depending on the viewer.

Click the viewer's **Help** button for more information on the compare feature.

2.3.3 Merge files

If your administrator has configured the feature for OpenText Brava! Enterprise, you can gather and arrange pages of multiple files and publish them as a single file. You can also choose to include any annotations that have been added to the files.

Only certain files can be merged, such as documents and images. Videos or audio files cannot be merged.

Merge pages of various files to a single output file:

1. Navigate to the location in your repository where the files are saved.
2. Select the files that you want to merge and click **Doc merge**. Depending on your configuration, your button might have a different name.
3. If markup files are associated with any of the selected files, a **Select markup** dialog box appears that allows you to select which markup files you want to include in the merged file. For each file, select the check boxes for any markup files you want to display and click **Continue**.
4. The file pages appear with their included markups in a **Doc Merge and Publishing** screen. Drag thumbnails from the list to the lower pane to add them to the new file.

Here are some tips for creating a merged file:

- Document pages can be dragged and arranged in any order.
 - Click + to add additional files to the merge list.
 - You can change which markup files appear in the files by clicking **Select markup**.
 - The **Merge All** button offers a quick way to merge all of the files currently in the DocMerge widget into a single file in the sequence you selected.
 - Files can be removed by clicking the **close** link next to the files in the list, or by clicking the **Remove All** button at the top of the screen.
 - Thumbnail pages can be removed from the new file by clicking the red **X** in the thumbnail or by clicking the clear link. This removes all of the pages you have added.
5. Once you have dragged and arranged all desired pages in the lower pane, select your desired output format from the **Publish Format** list, and then click the **Publish New Document** button.
 6. From the **Publish** dialog, choose how you want to publish the merged file:
 - **Browse** allows you to search for a location to publish the new file. Select a location to publish the file and enter a name for the new file.
 - **Home Cabinet** publishes the file to the **Home Cabinet**. Enter a name for the new file.

- **Download** publishes the new file and prompts you to save the file to your local device.
7. Click **Continue**. Once published, you can click **Go to location** to open the location of the new file.





Note: For more information on merging files, click the viewer's **Help** button.

2.3.4 Publish a file to PDF or TIFF

If your administrator has configured OpenText Brava! Enterprise or OpenText Intelligent Viewing, you can open files in the viewer and publish them as a PDF or TIFF. Each viewer provides various publishing options.

In OpenText Brava! Enterprise

Publish the file:



1. To open the file in the viewer, click the file or select it and click the **View** button  on the **Action Bar**.
2. Click the **More Actions** button , then click **Publish to PDF** or **Publish to TIFF**.
3. Choose the required publishing options, including **Pages**, **Markup**, **Output**, and **Watermark/Banners**.
4. Click **Publish**.



Note: For more information about publishing files in OpenText Brava! Enterprise features, click the viewer's **Help** button.

In OpenText Intelligent Viewing

Publish the file:

1. To open the file in the viewer, click the file or select it and click the **View** button  on the **Action Bar**.
2. On the main toolbar, click the **More tools** button , and then click **Publish to PDF** or **Publish to TIFF**.
3. In the **Publish options** dialog box, choose options including **General**, **Coloring and lines**, **Markup**, **Security and Permissions**, and **Watermarks and Banners**.






Notes

- For help on using tokens in watermarks and banners, see [“Use tokens in watermarks and banners” on page 43](#).
- Your administrator might have set up a default watermark and banner in your environment. You can edit these watermarks and banners for a file at publishing time.
- Your administrator might have set up a default screen watermark and banner in your environment. These watermarks and banners cannot be edited by users and are displayed only in the screen view of the file and not in the published and printed outputs. If both types of watermarks and banners are set up for a file, both types appear on the screen.

4. Click **Publish**.
5. Proceed to one of the following.

Create a new file:

1. In the **Save** panel, leave the **New file** check box selected.
2. **Optional** To change the default location of the new file, click **Remove**  in **File name**, click **Browse** , select a location, and then click **Add**.
3. Enter the **File name** and click **New File**.
4. In the **Upload** panel, click **Continue**.
5. In the **Create type** panel, enter property values as required.
6. **Optional** You might be able to select content in your repository with content or properties you want the new file to inherit. Click **Browse**  in the **Use source content** field, select the content, click **Add**, and then select the **Properties** check box under **As blueprint for**. For more information, see [“Create new content” on page 49](#).
7. Click **Continue**.

Add a version:

1. In the **Save** panel, select the **Version** check box and click **Add Version**.
2. In the **Version details** panel, select a version number under **Upload version as**.
3. **Optional** Enter a **Description**.
4. Select or clear the **Set as current version** and **Keep the file locked** check boxes as needed.
5. Click **Add Version**.

Add a rendition:

- In the **Save** panel, select the **Rendition** check box and click **Save as rendition**.

Download the file:

- In the **Save** panel, click the **Download** check box and click **Download**.



Note: For more information about publishing files in OpenText Intelligent Viewing features, click the viewer's **Help** button.

2.3.5 Use tokens in watermarks and banners

When publishing a file to PDF, you can set up a watermark and one or more banners that are burned in to the file as part of the publishing process (see “[Publish a file to PDF or TIFF](#)” on page 41). Watermarks and banners can contain both free text and tokens. At the time of publishing a file, these tokens are replaced by the data requested by them. There are two types of tokens, static and dynamic, and all tokens are preceded by a percentage sign (%).

Static tokens consist of file information maintained by the viewer such as the current date, the file's number of pages, and the file's title. The following example shows the use of the %Title, %Date, and %TotalPages tokens.

Example:

Input

Title: %Title | Creation Date: %Date | Number of Pages: %TotalPages

Output

Title: My Document | Creation Date: July 30, 2025 | Number of Pages: 50

For a complete list of the available static tokens and their descriptions, see section 5.3.1 “Tokens” in *OpenText Documentum Content Management - Intelligent Viewing User Help (CLIVCS-H-UDM)*.

Dynamic tokens can be used to integrate document attribute values that resolve dynamically at the time of publishing a file. The format of the tokens is %dbstring(<attribute>), where <attribute> is the name given to the document attribute by your administrator. Some examples of dynamic tokens might be document status (%dbstring(a_status)) and department (%dbstring(dept)). The following example shows how these dynamic tokens might be used:

Example:

Input

Status: %dbstring(a_status) | Department: %dbstring(dept)

Output


Status: Approved | Department: Finance



**Notes**

- If there is no value available for a dynamic token to resolve to, the token is replaced with *[MISSING]* in the watermark or banner.
- For information about dynamic token attribute names configured in your environment, contact your administrator.

2.3.6 View multiple files

If your administrator has configured OpenText Intelligent Viewing, you can open

multiple items in the viewer by selecting the items and clicking **View**  or **MultiFile View** on the **Action Bar**. The exact names of the menu items might be different in your environment.

- All supported document types launch in a single viewing session in the in-place viewer. To maximize the in-place viewer, click the **Full view** button .
- To open additional documents in the viewer, select them and click **View**  or **MultiFile View** again.
- To navigate documents in the viewer:
 - Scroll through the documents. The documents appear in the viewer as a continuous scroll.
 - To go to a document or page in a document, choose the document or page from the list on the main toolbar.

The number to the right of the list indicates the total number of open documents. The number on the right of a selection in the list indicates the number of the selected document in the total collection of open documents. For example, if the number is 3, the selected document is the third in the collection.

The number on the left of a selection in the list is the number of the selected page out of the total number of pages in the selected document. For example, if the number is 2/4, the selected page is the second in the selected document, which has a total of four pages.


- Your administrator determines the maximum number of documents that can be opened simultaneously. If the number of selected documents exceeds the maximum, the **View** or **Multi-File View** menu item will be hidden.
- If a selected document is of a type not supported by the viewer, the **View** or **Multi-File View** menu item is hidden.
- If one or more selected documents fail to open, a message appears identifying the failed documents and the remaining documents are opened in the viewer.

For more information about viewing multiple files in OpenText Intelligent Viewing, click the viewer's **Help** button.

2.3.7 Use Accessible compliant mode

If you use OpenText Intelligent Viewing, you can choose to run the viewer in Accessible compliant mode. When this mode is turned on, the viewer supports a limited set of functions, and annotations are not available.

Turn on Accessible compliant mode:

1. On the **Profile Menu**, click **User Settings**.
2. Under **Accessibility**, turn on the **Accessible compliant mode** switch.
3. In the **Refresh to view the changes** message, click  to reload Smart View and have the change take effect.

Accessibility toolbar

Accessible compliant mode supports a limited functionality toolbar:



Previous page

Navigates to the previous page of the active document.



Page

Displays the active page of the document. Enter a page number and press **ENTER** to navigate to a specific page.



Next page

Navigates to the next page of the active document.



Zoom out

Incrementally decreases magnification of the document.



Zoom in

Incrementally increases magnification of the document.



Rotate left

Incrementally rotates the document in 90-degree, counter-clockwise turns.



Show page text

Displays the active document in text-only mode in a scrolling window. The text in this window can be read by a screen reader.



Publish to PDF

Publishes the active document as a PDF file. For more information, see [“Publish a file to PDF or TIFF” on page 41](#).



Publish to TIFF

Publishes the active document as a TIFF file. For more information, see [“Publish a file to PDF or TIFF” on page 41.](#)



Publish for printing

Displays the active document in a PDF viewer. From the viewer, you can print, download, view document properties, and more.



Close

Closes the viewer.

For more information about Accessible compliant mode in OpenText Intelligent Viewing, click the viewer’s **Help** button.

2.3.8 Consolidate markups

When working with markups in OpenText Intelligent Viewing, you can consolidate markups by creating filters. You can select these filters to display and hide markups as needed.


You can create multiple filters, and a single markup can be part of more than one filter.



Notes


- Filters are not available when viewing multiple files. For help on viewing multiple files, see [“View multiple files” on page 44.](#)
- Filters can be applied only when the **Markups & Filters** panel is open. At all other times, all markups are displayed.
- You cannot create, edit, or delete markups when the **Markups & Filters** panel is open. To do so, open the **Tools** panel.

To create a markup filter:

1. On the main toolbar, click the **Toggle panel** button .
2. Select the **Markups & Filters** panel.
3. Under **All Available Markups**, select the markups you want to add to the filter, and then click **Create Filter**.
4. Type a name for the filter and click **Save**. Before saving, you can set the filter as the default.

The new filter appears in the panel under **Available Filters**.


To display markups in a filter:

1. Select the **Markups & Filters** panel.
If a filter is set as the default, its markups are displayed and all other markups are hidden.
2. Under **Available Filters**, select the filter with the markups you want to display.
3.  **Optional** To display and hide markups at will, select or clear their check boxes under **All Available Markups** as needed. Any changes in selections are not saved with the filter.

**Notes**

- To set a filter as the default, select it and click the **Set Default** button.
- You can select only one filter at a time.

To delete a markup filter:

1. Select the **Markups & Filters** panel.
2. Under **Available Filters**, click the **Delete** button  of the filter you want to delete.



Note: You can delete only filters that you have created.

To include a filter's markups when you publish:

1. Select the **Markups & Filters** panel.
2. Under **Available Filters**, select the filter with the markups you want to include.
3. Leave the **Markups & Filters** panel open and proceed to publish as normal. See [“Publish a file to PDF or TIFF” on page 41](#).



Note: Markups that are consolidated in a filter behave the same way as any other markup. You can select the markup, edit it, and edit its properties as you would normally. You can also view and select the markups in the **Tools** panel, as well as delete a markup, and add and reply to markup comments.

For more information on working with markups in OpenText Intelligent Viewing, click the viewer's **Help** button.


2.4 View and edit content properties

You can view and edit a content item's properties on the **Properties** page. Editing properties allows you to control content relationships, automated behavior, and the ability to find content in a search, among other uses.

For example, administrators can configure Smart View so that content with the Documentation keyword is automatically processed as documentation. You can create or import content as a draft and then convert the content for processing as documentation. To do this, you can edit the properties of the content.

Administrators configure and create default properties templates and **Properties** pages. You assign default properties and property fields to content by selecting a creation profile during content import or creation.

Edit content properties:

1. To view a content item's properties, point to the item in a Doclist and click **Properties** . Scroll through the **Properties** page or click the sub-headings at the top of the page to navigate to your desired section.



Note: You might not have permission to edit a **Properties** page or certain content properties. Contact your administrator for more information.

2. Click **Edit** at the top of the page to switch to edit mode.



Tips

- Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode,

click . Expanded mode is available in both edit and view modes.

- To re-size columns in a grid, point to a column divider on the header and drag the arrows. To revert to the default size, double-click the column divider or clear your cache. Column re-sizing is available in both edit and view modes.

3. When you are finished making your edits, click **Save**.

Smart View reviews your changes and lets you know if the data you entered is valid.



Note: Depending on how the **Properties** page is configured, you might also need to complete an electronic signature to save property changes. Follow the guided steps at the top of the page to complete your signature.

2.5 Create new content

You can create new content in Smart View if your administrator has granted you permission and has configured creation profiles that are applied when you create the content.

Depending on your Smart View configuration, you can add new content using a dedicated **Add File** tile on the Landing page or the **Add item** menu in a folder.


Your Smart View configuration might also include Preset files with pre-defined content creation rules built in, usually based on content type. For example, your administrator might create a Preset tile for adding weekly maintenance sheets and give it the title *Weekly Maintenance Sheets Go Here*.

Create new content:

1. On the Landing page, click the **Add File** tile. In a folder, click **+ > Add file**.

Depending on your Smart View configuration, the following panes might appear, requiring you to specify the content you are adding. Complete all fields marked with a red asterisk:

- **Select type:** This pane allows you to choose the type of content to add through the selection of various creation profiles. You might be able to select from a **Preset** or **Recent** list, create a **Custom** type in the **Create type** screen,

or edit a **Preset** or **Recent** type. Click  beside a type to go to the **Edit type** pane, where you can edit the type's properties. When creating a **Custom** type or editing a **Preset**, you might be able to select content in your repository with content or properties you want the new content to inherit. To do so, select the content in **Use source content** and then select the **Properties** or **Content** check box under **As blueprint for**.





Note: If you choose to select content with content or properties you want the new content to inherit, the process creates a **relation** between the source content and the new content. If you choose to inherit content, the relation type is **Has as copy/Is a copy of**. If you choose to inherit properties, the relation type is **Provides info to/Gets info from**.

- **Edit Properties:** If there is a property page associated with the type of content you have selected, you might need to fill in some property information for your new content item, such as **Name**, **Title**, and **Subject**.



Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded

mode, click . Expanded mode is available in both edit and view modes.

- **Select template:** This pane allows you to select a standard **Preset** or **Recent** template for your new content, if your administrator has made them available. To view the templates in **Gallery View**, which provides a thumbnail preview of each template, click .
 - **Add linked document to create:** This pane allows you to optionally create a second content item as a peer **relation**. To create the item, click the **Link peer** link. As with the first item, you are prompted to edit properties and select a template.
2. On the **Edit file** screen, click one of the following options:
- **Edit now:** Click this option to edit the new content immediately as part of the creation process. The new content item is checked out for you to edit. On the **Finish** screen, click **Update now** to upload an update for the new item and check it in, or click **Update later** to access the checked out item at a later time.
 - **Edit later:** Click this option to edit the content item at a later time.

A message appears on the header when your new content has been created in Smart View.



Note: The administrator can turn these editing options on or off.

3. Optional Click the message for status information.

2.6 Edit content

Your configuration determines if you can edit files and how you can edit them. There are multiple methods to edit a file:

Check out a file

Select a file and check it out of the repository. The file is downloaded to your machine where you can edit it using an app installed on your machine. When you are done, you check it back in to the repository, uploading it from your machine and adding a new version of the file to the repository.

When you check a file out of the repository, other users cannot edit the file until you check it back in.

For more information on editing a file this way, see [Check out content on page 23](#), [Check in content on page 24](#), and [Add a new version on page 24](#).



Edit and co-author in Microsoft 365

If this option is configured, you do not need to check out a file to edit it. Instead, you can open and edit the file directly from your browser in the relevant Microsoft 365 app. For more information, see [“Edit and co-author in Microsoft 365” on page 51](#).

2.6.1 Edit and co-author in Microsoft 365

Microsoft 365 editing and co-authoring allows you to open and edit Microsoft Word, Excel, and PowerPoint files. To open a file, point to it and click **Edit online**, or select it and click **Edit online** on the **Action Bar**.

The following are some important details about editing in Microsoft 365:

- You do not need the apps installed on your machine, but you can edit only files supported by the Microsoft 365 apps.
- You do not need to manually save your changes as you work, nor do you need to check files in and out of the repository. Microsoft 365 stores all of your updates and, when you close the file, uploads the changes to the repository as a new version.
- When you open a file in Microsoft 365, two icons appear next to the file:
 - The **Locked by Office for the web** icon  indicates the file is checked out by Microsoft 365. If you point to the icon, it displays the date when the file was checked out.
 - The **Available for Collaboration** icon  indicates to other users who have permission that they can edit (co-author) the file with you.

The icons disappear when all users have closed the file.

- Co-authoring allows more than one person to edit the same file at the same time. If multiple users edit the same file, the names of the other participants appear at the top of the app, and color-coded cursors show where in the file they are working. If one participant makes a change, it immediately is displayed to all the other participants. The file remains open for editing as long as at least one person is still editing it.
- Files with **sensitivity labels** are still restricted based on those labels when accessed in Microsoft 365 apps.
- If you cancel the checkout of a file being edited in Microsoft 365, changes might not be saved.
- If you edit a large file, you might see a warning message warning that the exceeds the size limit. You and other users can still edit the file, but editing might not work as expected.
- If you do not see the **Edit online** option, you might not have permission to edit the item, you might not be configured to use Microsoft 365, or you might not have a license. If you think you should be able to use Microsoft 365 online editing and co-authoring but do not see the option, contact your administrator.

2.7 Add a folder or a cabinet

1. Depending on whether you want to add a folder or a cabinet, do one of the following:
 - If you want to add a folder, in an existing folder, click **+** > **Add folder**.
 - If you want to add a cabinet, which can only be added at the repository level, in a repository, click **+** > **Add cabinet**.
2. Type the name of the folder or cabinet and click **✓** or press **ENTER**.
3. If you are adding a folder, and if there are multiple types of folders available in your configuration, the **New folder** pane appears.
Choose the **Type** of folder, then provide any additional required folder properties.
4. Click **Add**.
A message appears on the header when the folder or cabinet has been created.

2.8 Upload content

You can upload content to your repository if you have the right permissions.

Depending on your Smart View configuration, you can upload content using a dedicated **Upload** tile on the Landing page or the **Add item** menu **+** in a folder.

Your Smart View configuration might also include Preset tiles with pre-defined content upload rules built in, usually based on content type. For example, your administrator might create a Preset tile for uploading weekly maintenance sheets and give it the title *Weekly Maintenance Sheets Go Here*.

Upload content:




1. From the Landing page, click the **Upload Files** tile. In a folder, click **+** > **Upload file** or drag content to the main folder or sub-folders in the browser window.
The **Upload** pane appears, which summarizes the files that are already queued for upload, if any, and allows you to upload additional content.
2. To add files, drag them to the pane or click **+** and select them from your computer. You can rearrange the upload processing order of the files by dragging them to new spots in the **Files** list. To remove a file from the list, point to the file and click **×**.
3. Click **Continue**.

Depending on your Smart View configuration, the following panes might appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk:

- **Select type:** To select a creation profile that will be used for all the files you queued for upload, click **Custom** and then select a category from the **Category** list. Depending on your choice and configuration, you might need to provide further information about the category before continuing. As part of the category properties, you might be able to select content in your repository with properties you want the uploaded files to inherit. To do so, select the content in **Use source content** and then select the **Properties** check box under **As blueprint for**. You might also be able to select from a **Preset** list to skip this process.




Note: If you choose to select content with properties you want the uploaded content to inherit, the process creates a **relation** between the source content and the uploaded content, and the relation type is **Provides info to/Gets info from**.

- **Edit properties:** If there is a property page associated with the type of files you have selected, this pane allows you to fill in some property information for your new files. You can rearrange the properties processing order of the files by dragging them to new spots in the list of files.  indicates a file that does not have its required properties verified yet.  indicates a file that has been verified. If the remainder of the files in the list share property attributes with the file you are currently editing, click  to apply the properties to the rest of the files below in the list.



Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded

mode, click . Expanded mode is available in both edit and view modes.



Note: The **Apply to the below files** option might be enabled by default depending on your Smart View configuration.

4. Click **Continue** to upload the files.

A message appears on the header when your files have been uploaded.



Note: A minimize option, available on either the side pane or the progress pane, allows you to run a process in the background and continue working. For example, you can submit a process in the side pane and then see a progress pane containing a minimize option.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is

expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

2.9 Upload a folder and its contents

Depending on your Smart View configuration, you might be able to upload a folder, its structure, and contents to your repository.

1. Click the **Upload Folder** tile on your Landing page, or navigate to a folder and click **+ > Upload folder**.




Note: You can also drag a folder from your computer to a folder in Smart View if your browser supports that operation. Contact your administrator for more information.

2. Select the folder from your computer and click **Upload**. When prompted for confirmation, click **Upload**.
3. Depending on your Smart View configuration, the following panes might appear, requiring you to describe the folder and its contents:
 - **Create type:** Select the folder **Structure**, **Category**, and any other required properties you're prompted for. As part of the category properties, you can choose to have the new folder inherit properties from the parent folder (automatically populated in the **Use source content** field). To do so, select the **Properties** check box under **As blueprint for**.
 - **Edit Properties for folder:** Describe the folder's properties as prompted. The properties will apply to all the documents and root folder, but not the sub-folders.



Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded

mode, click . Expanded mode is available in both edit and view modes.

4. Complete all required fields in each **Edit properties for folder** screen (marked with a red asterisk), clicking **Next** to go to the next screen.

At the end of the process, the folder structure is created and a message appears on the header.
5. **Optional** Click the message for more information, which can include the location of your new folder.

2.10 Drag and drop to upload content

You can upload content to your repository by dragging files and folders from your computer to Smart View. Multi-selection of files is supported. The content upload process defined by your administrator starts when you drag your content to Smart View (see [“Upload content” on page 52](#) and [“Upload a folder and its contents” on page 54](#)).



Notes

- Some of the drag and drop functionality described here is dependent on browser configuration. See your administrator for details.
- In some cases, the final repository location of the files you upload is determined by content upload rules defined by your administrator. Review the upload status banner messages that appear when files are successfully uploaded for more details on content location.

Drag a file or folder from your computer to the Smart View Landing page

Your content usually appears in your **Home Cabinet** when the upload is completed.

Drag a file or folder from your computer to an existing folder in Smart View

Navigate to a folder in Smart View and drag files from your computer to the Doclist. Unless Smart View is configured to place uploaded files in a defined location in the repository, your uploaded file appears in the folder when the upload is completed.

Drag a file or folder from your computer to a generic Upload File tile or a specific Upload File preset tile on the Landing page

If your target tile is configured as a Preset, pre-defined content upload rules, usually based on content type, are followed. For example, your administrator might create a tile called *Weekly Maintenance Sheets Go Here*, for your convenience.

Drag a new version of a file from your computer to the existing checked out content

Navigate to the repository location of your checked out file and drag an updated version of the file from your computer directly to the file's Doclist row or thumbnail. The standard add version process starts.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

The following operations cannot be performed on the item until the **Add version** process completes: delete, cancel check out, and lifecycle state change.

Drag an email message and its attachments from a Microsoft Outlook window to Smart View

You can select email messages in Microsoft® Outlook® or attachments in the messages, and drag them to Smart View. Any attachments remain part of the uploaded email or are extracted as separate files based on the content creation rules defined by your administrator. Email (.msg files) attachments are not imported when you import an email.

2.11 Inherit from existing content to create or upload

Depending on your Smart View configuration, it might be possible to select existing content in your repository and use it as a sample of content or properties to inherit when you create new content or upload content.

1. Navigate to the content item you want to use as your sample. In a Doclist, select the check box next to the item and click **Create file from** or **Import file from** on the menu.



Note: The names of the menu items are custom and might not exactly match the examples provided here. Contact your administrator for more information.

2. When the wizard for creating or uploading content appears, complete the process as described in [“Create new content” on page 49](#) or [“Upload content” on page 52](#).



Note: The content you select in the first step is the source content that is automatically populated in the wizard’s **Use source content** field in the **Create type** pane.

2.12 Mass update content

Your administrator can configure mass update processes that allow you to select multiple content items in your repository, then make changes to their properties in a batch. You can also select folders and virtual documents, and make mass updates to their content and properties.




Note: Mass update of property page grids is not supported.



Run a mass update on multiple content items:

1. Find the content you want to update by navigating to a certain Doclist, folder or virtual document, or by running a search to find content across your repository.
2. Select the content items you want to update, then click **Mass Update** > (Name of mass update process) on the **Action Bar**. Your administrator defines the parameters of the update process, including its name and the content types that can be updated.

The process you select might require you to specify what needs to be updated within your content selection: folder properties or file properties. Based on your selection, you can further specify if sub-folders and virtual document descendants should be included in the update. You might also choose to update all versions of your selected content (but not all versions of virtual document descendants).


The mass update process validates the content you selected and displays a list of files or folders that are incompatible and will not be processed. To copy the list to your clipboard so you can paste it for review in another application, click



the **Copy to clipboard** button .

3. Click **Continue**. A **Properties** pane appears that allows you to update the necessary values:
 - Fields marked with an asterisk need to be updated before you can continue.
 - A **(Multiple values) Enter new value for all files** note might appear in some fields where several different values are represented. Type a new value in the field to apply it to all the items.
 - Point to a count box beside a field to see a pop-up listing of items with the associated value. Click a count box to show the list of items.
 - Click the **Select** button  next to an editable field to view the current values assigned to individual items. Select an item in the list to make a change, or point to an item and click the **Remove** button  to remove the value. Click **Update**.



Note: You can select multiple items, but only one new value can be entered at a time. If you have several values to change, make the first change, click **Update**, then return to make additional updates in subsequent mass update jobs.

Some editable fields allow you to add a totally new value. Click the **Add** button .

- A **(Multiple values)** note might appear in some fields where you can add several different values to an item, for example, a list of keywords or multiple authors. Click the **Select** button  next to the field to revise the selections. Point to a value and click , then **Apply to all files** or **Remove from these files**. If you need to add a valid value that is not currently applied, turn on the **Select new values** switch to see all the possible selections. Some fields might also allow you to specify the order of the selections, for example, a keywords list where the ranking of words is significant, by dragging the selections into your desired order.
- If you make updates to more than seven items (or the list is filtered), you a summary of the changes you made appears.

- Undo any of the changes you made in a field by clicking the **Undo** button




4. When all of your changes are ready, click **Save** to complete the mass update of your selected items.

2.13 Recycle bin

Depending on your configuration, Smart View stores items that you have deleted in a recycle bin. The recycle bin can contain both documents and folders. To access your recycle bin, click the **Recycle Bin** tile on the Landing page. The tile in your environment might have a different name.

Deleted items are displayed in the **Recycle bin** list, showing the name, title, status, date of deletion, and original location of each deleted item.

You cannot view deleted documents or see the contents of deleted folders, but you can do the following:


- View item properties by pointing to the item and clicking the **Properties** button .
- “Restore deleted items” on page 58
- “Purge deleted items” on page 59
- “Empty the recycle bin” on page 59
- “Manage other recycle bins” on page 59 (if you are an administrator)




Notes

- Deleted items are excluded from search results, but you can search items in the recycle bin within the bin itself.
- When you delete a virtual document with all its components, the virtual document structure is not preserved and only the component documents are stored in the recycle bin. Each component is treated as an independent document and is restored independently.
- The recycle bin supports virtual document snapshots and treats them like any other document.

Restore deleted items

1. To restore an item, point to the item, click the **More actions** button , and then click **Restore**. To restore multiple items, select the items and click **Restore** on the **Action menu**.
2. When prompted for confirmation, click **Restore**.
The items are fully restored to their original location.

Purge deleted items

1. To purge an item, point to the item, click the **More actions** button , and then click **Delete**. To purge multiple items, select the items and click **Delete** on the **Action menu**.
2. When prompted for confirmation, click **Delete**.


Important

Purged items are deleted permanently and cannot be restored.

Empty the recycle bin

Depending on your permissions, you might be able to empty your recycle bin.

Empty your recycle bin:

- On the list header, click the **Show more** button  and then click **Empty recycle bin**.


Important

The recycle bin is immediately emptied without a confirmation prompt. All items are deleted permanently and cannot be restored.

Manage other recycle bins

If you are an administrator, you can manage the recycle bins of other users. You can restore and purge items, and empty the bin as you would in your own recycle bin.

Manage another user's recycle bin:

1. On the **Recycle bin** list header, click the **Show more** button  and then click **Switch recycle bin**.
2. In the **Switch recycle bin** dialog box, select the user in the list and click **Switch**.
The user's recycle bin opens and the user's name appears on the list header.
3. Manage the bin as required.
4. To return to the administrator recycle bin, click **Switch recycle bin** again and select **Administrator** in the dialog box.

2.14 Share content with external services

If you have permission, you can share content with external services such as email or OpenText™ Core Share. See “**Content actions**” on page 21 for information on how to activate sharing for selected content.

2.14.1 OpenText Core Share


If your organization uses OpenText Core Share and has configured it for use in Smart View, you can share selected content to OpenText Core Share for external collaboration and manage access permissions.

Share content with OpenText Core Share:

1. On the **Share** menu, select **OpenText Core Share**. OpenText Core Share opens. Log in if necessary.
2. Complete the share using the **OpenText Core Share** screen by assigning contacts to specific roles that define what they can do with your content. The following roles are available:
 - **Limited:** Permission to view the content only. No downloading allowed.
 - **View:** Permission to preview, download, and copy the content.
 - **Collaborate:** Permission to edit, copy, download, and rename the content.
 - **Manage:** Permission to view, edit, move/copy, and delete content, as well as to add collaborators and update permissions.

To add contacts to the roles fields, type the contact's name or email address. To remove a contact from a field, click the x beside their name.

3. If you want the content to be marked as checked out after you have shared it, turn on **Checkout files after sharing**.
4. Click **Share**.

In a Doclist, content that is shared is marked with the **Share** icon , and all shared content is summarized in the **My External Shares** Landing page tile.

Update sharing details:

- Click  in the content's row in a Doclist, make your changes in the **Manage Share** screen, then click **Update**.

Stop sharing content:

- Select **Stop share** in the **Share** sub-menu.



Note: If you add a new version of an actively shared item, you have the opportunity to control what happens to the item in OpenText Core Share. In

the **Version Details** screen, select **Add this version to OpenText Core Share** if you want to update your collaborator with the latest version. Select **Continue sharing the earlier version** if you want your collaborators to continue with the original shared version.

2.15 Content relations

Relations help organize and process repository content. Administrators configure types of relations that you can choose when you define relations between content items. Automated processes, such as property inheritance when adding or uploading content, also create relations. You can create a relation and delete a relation.

2.15.1 Create content relations

1. In a Doclist, point to an item and click **Create relation**.
2. In the **Create Relation** panel, choose a relation type in the **Select relation** list.
3. To select one or more items to add as relations, click **+**, select the items, and click **Add**.

The selected items are listed in the **Create Relation** panel. To remove an item, point to it and click **×**. To add more items, click **+**.



Note: If you are selecting a one-directional relation, it is possible to reverse

the relation by clicking .

For example, you can create a relation between items called *Presentation template* and *Presentation August*, and select the relation type *Is a copy of*. This sets *Presentation template* to be a copy of *Presentation August*, but the

relation can be flipped. To flip the relation, click to set *Presentation August* to be a copy of *Presentation template*.

4. Depending on your configuration and the relation type, you might be required to enter properties for each of the relations.
 - a. In the **Create Relation** panel, click **Continue**.
The related files are listed in the **Edit properties** panel.
 - b. Enter properties for the related file. If there are multiple files, select the first file, enter the properties, and click **Next file**. Repeat these steps until you have entered properties for all the files. Required properties are marked with an asterisk.



Tip: To copy properties from the selected file to the files below it on the list, select the file, and click the **Apply to the below files** button





at the bottom of the panel.

5. Click **Create**.

A message appears confirming the relation creation. To view the new relations on the content item's **Relations** page, click **Go to relations**. For more information, see *“Work with content relations” on page 62*.

2.15.2 Work with content relations

View a content item's relations:


1. Point to the item and click the **Properties** button .
2. On the **Properties** page, click  and click **Relations**.
The relations are listed on the **Relations** page.









Note: You can view the relations that are created in OpenText Content Management and transferred to OpenText Documentum Content Management (CM).


Relations can be created between workspaces of a single repository. They cannot be created across multiple repositories.


Customize relations viewing settings:

1. On the **Relations** page, click the **Settings** button .
2. Select the view mode:
 - To view page contents in a list view, select **List**.


To view all relations in the table, click the **Show all** button  in the table header. This option expands table rows to display relation details. To view a relation's details, click the **Show all** button  in the relation's row.
 - To view page contents in a list view with resizable columns, select **Pinned columns**.


Resize the columns by pointing to the header between two columns and dragging the arrows. To search content in a column, click the **Search in column** button . To sort on a column, click **Sort ascending**  or **Sort descending** .
3. To customize column settings, select **Columns settings**.
 - a. In the **Columns settings** panel, do any of the following:
 - To add columns to the relations table, click the **Add** button . Drill down as needed and select the columns you want to add.

- To remove a column from the table, point to the column and click .
- To reorder columns in the table, point to a column and drag it to its new location.

- b. When you are done, click the **Settings** button .
- The table is refreshed with your changes.

View and edit a relation's properties:

1. On the **Relations** page, point to the relation and click **Relation properties** .
2. On the relation's **Properties** page, click **Edit**.
3. Edit properties as needed. Required properties are marked with an asterisk.
4. Click **Save**.

 **Note:** For more information on viewing and editing properties, see “[View and edit content properties](#)” on page 48.

Perform other actions on relations:

- On the **Relations** page, point to a relation to display the **Inline Action Bar** or select one or more relations to display the **Action Bar**.

The options on the bars allow you to perform actions such as view the relation, view the content item's properties, and delete a relation.


2.16 Collections

Collections are assemblies of documents, folders, and cabinets useful for quick access to perform your work.

If configured by your administrator, the **Collections** tile on the Landing page displays your recently accessed collections and collections shared with you, to a maximum of 10. The name of the **Collections** tile is configurable so it might be different in your Smart View environment.



Perform actions on collections

You can perform the following tasks on the **Collections** list page:

 **Note:** Some of the tasks might not be supported in your Smart View configuration. The name of the **Collections** list page is configurable and might be different in your Smart View environment.


Access the Collections list page

You can access the **Collections** list page a few different ways:

- Click the **Open list** button  on the **Collections** tile.
- Click the **Collections** button  on the Landing page header. The button appears in the Landing page header only if it is configured by your administrator.
- Click the **Show all** link on the **Collections** tile. The **Show all** link appears if the maximum count (10) of collections or collection items is exceeded.

Create a user collection

You can create a user collection a few different ways, depending on what page you are on:

- On the **Collections** list page, click the **Plus** button  next to **Collections** on the left pane.

In the **Create Collection** dialog box, enter the **Collection Name** and then click any of the following:

- **Create and add items:** To create the collection and add the items on the document list together.
- **Create:** To create the collection. You can add the items later on the **Collections List** page.


The newly created collection and its associated items are listed in the **Collections List**.

- On the **Collections** list page, when no collections exist, click **Create Collection** and then follow the instructions above.
- On the **Document List** page:
 1. Select an item and click **Add to collection**.
 2. In the **Add to collection** dialog box, select **Add new** and enter a collection name.
 3. Click **Add**.

The newly created collection and its associated items are listed in the **Collections** list.

Add items to a user collection

You can add items to a user collection on any of the following pages:

- On the **Collections** list page:
 1. Click the collection to which you want to add items.
 2. Click **Show more**  next to the collection name on the header and then select **Add item**.



Tip: If no items have been added, you can click **Add item** in the list view.

3. Select one or more items in the list and then click **Add**.
- On the **Document List** page or on the **My Favorites** page:
 1. On the Landing page, click **Document List** or **My Favorites**.
 2. Select the items to add and then click **Add to collection**.
 3. In the **Add to collection** dialog box, select the required collection name from the **Collections** list.
 4. Click **Add**.

Copy an item from one collection to another

1. On the **Collections** list page, open a collection.
2. Select one or more items to be copied and then, in the header, click **Add to collection**. Depending on your configuration, you might need to click **More actions**^{***} to access this option.
3. In the **Add to collection** dialog box, select an existing collection in the list.
4. Click **Add**.

The selected items are copied to the new collection.



Note: You cannot add or copy an item more than once into the target collection.

Move an item to another collection

1. On the **Collections** list page, open a collection.
2. Select the items you want to move to another collection and click **Move to collection**. Depending on your configuration, you might need to click **More actions**^{***} to access this option.
3. In the **Move to collection** dialog box, select the destination collection from the list.
4. Click **Move**.

Remove a collection item

1. You can remove specific collection items from a user collection. Do one of the following:
 - On the **Collections** tile, on the Landing page:
 - a. Click **Expand** ▼ next to the collection from which you want to remove items.

- b. Click **More actions** *** and then select **Remove**.
- On the **Collections** list page:
 - a. Open the collection from which you want to remove items.
 - b. Select the item to be removed and then click **Remove**. Depending on your configuration, you might need to click **More actions** *** to access this option.
2. In the **Delete** confirmation dialog box, click **Delete**.

Rename a collection

1. On the **Collections** list page, open a collection.
2. Click **Show more** ▼ next to the collection name on the header and edit the name of the collection.
3. Click the check mark to save the new name, or the **x** button to cancel the change.

Delete a user collection

1. On the **Collections** list page, click **Show more** ▼ next to the collection name on the header and then select **Delete**.
2. In the **Delete** confirmation dialog, click **Delete**.



Note: Deleting a collection does not delete the items in that collection.

View permissions of a collection item



1. Select one or more collection items and then click **Permissions**.
2. For each selected item, the **Permissions** page displays the item permissions, extended permissions, and the security name of that item. You can enter a name or group for the collection item to look up the permissions.
3. On the **Permissions** page, click **Show more** ▼ to view the following:
 - Properties
 - Relations

View properties of a collection item

1. To view metadata details of a collection item, select one or more collection items and then click **Properties** ⓘ.

The **Properties** page displays the metadata of the selected collection item and displays a preview pane that shows the contents of the selected item.
2. On the **Properties** page, click **Show more** ▼ to view the following:
 - Permissions
 - Relations

View related documents

1. To view a list of documents that are related to the collection item, select one or more collection items on any of the application pages and then do the following:
 - If you want to view related documents from the **Properties** page, click the item's **Properties** button .
 - If you want to view related documents from the **Permissions** page on the header, click **Permissions**.
2. On the **Properties** or **Permissions** page, click **Show more**  and then select **Relations**.

Locate a collection item

- Select a collection item on any of the application pages and then click **Locate**. Depending on your configuration, you might need to click **More actions**^{***} to access this option.

The **Document List** page appears, expanding the directory path in the left pane.

You can find both the parent folders and parent documents of a collection item using the **Locate** option.

View native content


- To view a collection item in its native format, select a collection item on any application page and then click **View native content**.
You can now choose to download the item in its native format.


View items

To view collection item contents in PDF format, click the item's name on any application page. The collection item's PDF content or rendition is rendered and displayed in a modal viewer.

View collection item versions

You can view all the available versions, as well as the contents and properties of collection item versions.

1. Select one or more collection items on any of the application pages, and then click **Properties**. Depending on your configuration, you might need to click **More actions**^{***} to access this option.
2. On the **Properties** page, click **Show more**  and then select **Versions**.
3. Select the required version and view the item or its properties:
 - a. Click the item name to preview the corresponding item content in the same browser. Click **Close** to close the content preview and return to the application view.

- b. Click **Properties**  to view the properties of the selected version.

Share a user collection

1. On the **Collections** list page, select a collection and click **Share**. Depending on your configuration, you might need to click **More actions**^{***} to access this option.
2. In the **Share Collection** dialog box, select the users or groups with whom to share the collection.



Tip: You can use wildcard search to find users or groups in the list.

3. Click **Share**.

You can view a list of collections shared with you by clicking the **Shared Collection** tab on the **Collections list** page.

Manage access to a shared collection

1. On the **Collections** list page, select a shared collection and click **Manage Share**. Depending on your configuration, you might need to click **More actions**^{***} to access this option.
2. In the **Manage Share** dialog box, add or remove users or groups from the list.



Tip: Enable **Unshare Collection** to stop sharing the collection with all users or groups.

3. Click **Update**.



Note: Users can see the changes when you rename a shared collection or add or remove collection items.

Chapter 3

Virtual documents

A *virtual document* is a collection of files constructed into a single, assembled file. For example, you can assemble a virtual document for a book that starts with a front cover document, then populate the virtual document with the files that make up the chapters. The book's front cover file is called the parent and the component files are called children. Virtual documents are identified in a Doclist with the virtual

document icon .

You can assemble a virtual document using different file types, including other virtual documents. A file can be in more than one virtual document at a time. Files that are part of a virtual document continue to appear in Doclists as individual files.

A *virtual document* is an active, editable file collection.

A *virtual document snapshot* is a read-only, archive version of a virtual document that represents the state of a virtual document at a certain moment in time.

3.1 Navigate virtual documents




Open a virtual document or virtual document snapshot by pointing to the document in a Doclist and clicking **Display outline** or **Display snapshot**. You can also select the document and click **Display outline** or **Display snapshot** on the **Action Bar**.

When you open a virtual document, the three-pane **Virtual Document** view appears, displaying:

- The virtual document tree.
- A **Properties** pane that displays properties of selected components.
- A **Preview** pane that shows the contents of selected components.

You can control content within the virtual document tree (but not a snapshot, since that is read-only) and change the presentation of information using the toolbar above the tree view.

The toolbar contains the following items:

	Back Return to the previous perspective and close the Virtual Document Outline .
<hr/>	
	Collapse all Collapse all trees in the selected virtual document.
<hr/>	
	Expand all Expand all trees in the selected virtual document.

**View versions**

Show or hide the version number of each component in the tree view. See **Set the version of a component to use with the virtual document** in “**Virtual document actions**” on page 71.

When a virtual document is checked out using the **Checkout** or **Edit** action, the virtual document's version labels has *_ExplicitCheckout_* appended. This lets users know that the virtual document was checked out using one of these actions, and that a new file needs to be uploaded when the document is checked in. This type of checkout is different from the one that occurs when a virtual document is checked out as a result of editing a virtual document, such as adding, removing, or replacing a component. In this type of checkout, a new file does not need to be uploaded.

**Show details**

Show a list view of the virtual document instead of the tree view.

**Hide details**

Hide the list view of the virtual document and go back to the tree view.

You can change the structure of the components in the virtual document tree, except for the root or top component, by dragging components to your desired location. You can select multiple components.



Note: Changing the structure of a virtual document, by re-arranging components, locks the parent nodes of the affected virtual document.

In the **Preview** pane, access the following features:

**Preview**

Show the **Preview** pane.

**Open in Brava Viewer**

Open the document currently previewed in the OpenText™ Brava!™ Enterprise viewer.

**Close**

Close the **Preview** pane.



Note: The **Preview** pane does not show special OpenText Brava! Enterprise features associated with a document, such as annotations or Changemarks.

3.2 Virtual document actions

Perform actions on content and virtual documents as described below.



Note: In most cases, actions can be performed by using the **Action Bar** above the virtual document tree view, which allows you to perform the action on multiple components, or by clicking the **More actions** button **⋮**.

View a virtual document

In a Doclist, point to the virtual document and click **Display outline**.

View a snapshot of a virtual document

In a Doclist, point to the virtual document snapshot and click **Display snapshot**.

Add a child component to a virtual document

Point to the component in the virtual document tree. Click the **More actions**

button **⋮**, click **Add child**, and then select one of the following actions:

Browse: Navigate through the repository to select single or multiple files to add.

Create: Create a new file using standard creation profiles.


Upload: Upload new files from your computer.



Notes

- The **Create** and **Upload** actions launch the content creation and upload processes defined by your administrator (see [“Create new content” on page 49](#) and [“Upload content” on page 52](#)).
- These actions automatically check out the parent component. When you check in, depending on the settings defined by your administrator, you might be able to check in the root component only or the root and all its descendants.

Edit the properties of a component

Point to the component in the virtual document tree, then click **Edit**  on the **Properties** pane header.

Convert content or a folder to a virtual document

In a Doclist, point to content or a folder and click **Convert to Virtual Document**.

Convert a virtual document back to a simple document


In a Doclist, point to the virtual document and click **Convert to simple document**. You can convert a virtual document parent to simple content only if it contains no children.

Insert a virtual document with properties inherited from a template

Point to the component in the virtual document tree under which you want to

add the virtual document, click the **More actions** button **⋮**, and then click **Add Child** or **Replace Child > From template**. Select a virtual document to use as the template.


Remove a component from a virtual document

Point to the component in the virtual document tree, click the **More actions** button , and then click **Remove**. The parent component is checked out. When you check in, depending on the settings defined by your administrator, you might be given the option to check in the root component only or the root and all its descendants.




Note: The root or topmost component cannot be removed.


Edit a component within a virtual document

Point to the component in the virtual document tree, click the **More actions** button , and then click **Edit**. The component is checked out. When you check in, depending on the settings defined by your administrator, you might be given the option to check in the root component only or the root and all its descendants.


Download a component

Point to the component in the virtual document tree, click the **More actions** button , and then click **Download**. The component is downloaded to your computer.

Set the version of a component to use with the virtual document

Point to the component in the virtual document tree, click the **More actions** button , and then click **Set to version**. Select a **Version** and click **Apply**.


Replace a component


Point to the component in the virtual document tree that you want to replace, click the **More actions** button , and then click **Replace**. The component is checked out. You can replace the selected component with a new file or an imported file, or from a virtual document template. Depending on the settings defined by your administrator, when you check in, you might be able to check in the root component only or the root and all its descendants.

View a component within a virtual document

Click the component in the virtual document tree. A preview of the file appears in the **Preview** pane.

Check out and check in a virtual document

Point to the component in the virtual document tree, click the **More actions** button , and then click **Checkout**. In the Checkout dialog box, click **Continue**.

A **Lock** icon  appears next to the component in the tree. To check the item back in, click **Check in**. Depending on the settings defined by your administrator, you might be given the option to check in the root component only or the root and all its descendants.

When a virtual document is checked out using the **Checkout** or **Edit** action, the virtual document's version labels have `_ExplicitCheckout_` appended. This lets

users know that the virtual document was checked out using one of these actions, and that a new file needs to be uploaded when the document is checked in. This type of checkout is different from the one that occurs when a virtual document is checked out as a result of editing a virtual document, such as adding, removing, or replacing a component. In this type of checkout, a new file does not need to be uploaded.

Cancel a virtual document checkout

Point to the component in the virtual document tree that is checked out, click the

More actions button *******, and then click **Cancel checkout**. In the Cancel checkout dialog box, click **Continue**.


Create a snapshot of the virtual document

In a Doclist or in the virtual document tree, point to the virtual document and

click **Create snapshot**. You might need to click the **More actions** button *******. If required, edit the default **Title** of your new snapshot and click **Save**.

Export virtual document ZIP rendition

If a virtual document has a ZIP rendition, you can export (download) the rendition in the following ways:

- In a Doclist, select or point to the root virtual document and click **Export Zip rendition**.
- In a Doclist, select or point to the root virtual document and click **Renditions**. On the **Renditions** page, select or point to the ZIP rendition and click **Export rendition** .

3.3 Edit virtual documents

Open a side-by-side view of a Doclist and a virtual document by pointing to the virtual document in the Doclist and clicking **Edit virtual document** on the **Inline Action Bar**. You can also select the document and click **Edit virtual document** on the **Action Bar**.


The side-by-side view displays two panes:


- A Doclist pane open at the location of the virtual document.
- A virtual document pane displaying the tree view structure of the virtual document.

In the side-by-side view, you can add one or more documents to the virtual document as children by dragging them from the Doclist to the target component in the tree view. You can also add documents from your favorites list by selecting **Favorites** in the **Select an object** list above the Doclist.


The side-by-side view also allows you to replace a document, remove a document, re-organize a virtual document, and convert a virtual document to a simple document.


Add children using drag and drop:

1. Drag the document from the Doclist or **Favorites** to the target component in the tree view. To add more than one document, select the documents and then drag them.
 - To add one or more children to a parent component, drag the documents to the parent component and drop them when a thick line appears below the component. Skip to **step 3**.
 - To add a single child to a child component, drag the document to the child component and drop it when a thin line surrounds the component. Go to **step 2**.
 - To add more than one child to a child component, drag the documents to the child component and drop them when a thin line surrounds the component. Skip to **step 3**.
2. An **Add as child or Replace** dialog box opens.
Click **Add as a child** and then click **Continue**.
3. The target component in the tree view is checked out. If the target component is a child, it is converted to a virtual document.
Check in the component. Point to the component in the tree view, click the **More actions** button , and then click **Check in**. You might be asked to provide information about the document's version and properties as part of the checkin.


To cancel the checkout, click the **More actions** button  and click **Cancel checkout**. Any children you have added are removed from the tree view.

Replace a child component using drag and drop:

1. Drag the new document in the Doclist or **Favorites** to the child component you want to replace and drop it when a thin line surrounds the component.
2. An **Add as a child or Replace** dialog box opens.
Click **Replace file** and then click **Continue**. The destination component is replaced with the new document.
3. The parent component of the destination component is checked out.
Check in the component. Point to the component in the tree view, click the **More actions** button , and then click **Check in**. You might be asked to provide information about the replacement document's version and properties as part of the checkin.


To cancel the checkout, click the **More actions** button  and click **Cancel checkout**. The replacement is reverted.


Remove a component:

1. Point to the component in the tree view, click the **More actions** button , and then click **Remove**.



Note: You cannot remove the root component.

2. The parent component of the component you have removed is checked out. Check in the component. Point to the component in the tree view, click the **More actions** button , and then click **Check in**.


To cancel the checkout, click the **More actions** button  and click **Cancel checkout**. The removal is reverted.


Reorganize a virtual document's structure:

1. Point to a component in the tree view and drag it to the desired new location. The parent component is checked out.




Note: You cannot move the root component.

2. Check in the components. Point to a component in the tree view, click the **More actions** button , and then click **Check in**.

To cancel a checkout, click the **More actions** button  and click **Cancel checkout**. The reordering is reverted.


Convert a virtual document to a simple document:


1. Point to the virtual document in the tree view, click the **More actions** button , and then click **Convert to simple document**.

The parent component is checked out and the documents that composed the virtual document appears individually in the tree view.



Note: You cannot convert the root component.

2. Check in the component. Point to the component in the tree view, click the **More actions** button , and then click **Check in**.

To cancel the checkout, click the **More actions** button  and click **Cancel checkout**. The individual documents revert back to a virtual document.


3.4 Compare virtual documents

You can do a side-by-side comparison of virtual documents.

Compare two different virtual documents:


1. Point to the first virtual document in a Doclist and click **Edit virtual document**. You can also select the document and click **Edit virtual document** on the **Action Bar**.

A side-by-side view opens with two panes: a Doclist pane open at the location of the virtual document and a virtual document pane displaying the tree view structure of the virtual document (see [“Edit virtual documents” on page 73](#)).


2. Locate the second virtual document in the Doclist pane. Point to the virtual document and click  **Compare virtual documents**.

A side-by-side view of the two documents opens.

Compare different versions of the same document:

1. In a Doclist, click **Show filters**  and select **All versions**.
2. Point to the first version of the virtual document and click **Edit virtual document**. You can also select the document and click **Edit virtual document** on the **Action Bar**.


A side-by-side view opens with two panes: a Doclist pane open at the location of the virtual document and a virtual document pane displaying the tree view structure of the virtual document with the selected version open (see [“Edit virtual documents” on page 73](#)).

3. Locate the second version of the virtual document in the Doclist pane. Point to the version and click  **Compare virtual documents**.

A side-by-side view of the two versions opens.



Notes

- To view the Doclist pane in Pinned columns mode, click **Pinned Columns**  on the pane's header. Click again to toggle back to List mode. For more help, see [“Basic actions” on page 14](#).
- For information on the actions you can perform on the virtual documents, see [“Edit virtual documents” on page 73](#).

Chapter 4

Workflows and lifecycles

Your administrator can configure workflow and lifecycle content management processes for you to use with content in your repository.

4.1 Differences between workflows and lifecycles

A workflow:

- Is a formalized version of a business process that has been broken down into individual tasks, usually involving the routing of one or more documents for review or sign-off.
- Applies business processes into the lifecycle of content.
- Supports commenting, tracking workflow progress, managing the various participants, and attaching supplementary content.
- Is considered a more human-centric process than a lifecycle, since it directly involves colleagues in workflow tasks. Lifecycles are less human-centric and describe the progression of a document from inception to final disposition through certain entry criteria.

A lifecycle:

- Is a sequence of states that has two primary functions: entry conditions and action types.
- Has entry conditions that specify the conditions a document must meet to enter a state.
- Has action types that are applied once the entry conditions are satisfied. A document can have various actions applied to it. For example, a common action is to set a property value such as Status, auto name a property value, or run a program (method). All of these are configured by your administrator.

Unlike a lifecycle, which must progress through content states in sequential order, workflow tasks are configured with specific output states. A workflow can then incorporate a more complex order of states than a lifecycle. Choose a workflow instead of a lifecycle for most business processes.

The following table describes key differences between a workflow and a lifecycle:

Table 4-1: Key differences between a workflow and a lifecycle

Workflow	Lifecycle
Composed of workflow tasks.	Composed of content states.

Workflow	Lifecycle
The order of progression through a lifecycle is handled by the workflow. Each task can set a resultant state, regardless of the intended lifecycle sequence.	Progresses in sequential order as dictated by each state.
Passes content from one state to another using an approval process for each task. Tasks can be acquired, accepted, rejected, or delegated.	Passes content from state to state using a set of criteria that must be met before content is accepted for the new state. Each lifecycle state might optionally have prompts.
Administrator controls can simplify the workflow process through methods, such as task automation and delegation.	Every level of lifecycle state progression requires manual input. Administrators can configure lifecycle batches to automate progression of content.
Supports commenting, a limited degree of tracking, multiple participants, and linking to other content. A workflow task is typically configured to be user-specific.	Does not track comments, lifecycle states, or attachments. A lifecycle is isolated to a single instance of content, and therefore ignores user specificity.

To learn more about workflows, see [“Workflows” on page 78](#)

To learn more about lifecycles, see [“Lifecycles” on page 95](#)

4.2 Workflows

A *workflow* is a formalized version of a business process broken down into individual tasks.

- The workflow applies business processes to the lifecycle of content and supports commenting, tracking workflow progress, managing the various participants, and adding *supporting files*.
- Your administrator configures workflows using a workflow template. Configuration includes entry conditions, task automation, and groups of participants. Automation ensures that users control only the steps that require user input, reducing the need for someone to constantly monitor progress.
- Workflows can be manually initiated by a user or automatically initiated by inbound email, repository, or database activity. In manually initiated workflows, users with content management privileges can send content to a workflow to initiate it. In automatically initiated workflows, content is sent to the workflow by the activity. In either case, content that passes through a workflow is maintained as *working files*. In addition, in the case of automatically initiated workflows, data related to the activity, such as the address and text of an email, can be mapped to workflow process variables.
- Once a workflow starts, content is reviewed and approved as needed as tasks are sent to designated users, who can acquire, accept, reject, or delegate the tasks as required. Depending on a workflow’s configuration, users might be required to add additional working files before processing a task assigned to them.

4.2.1 Send content to a workflow

You initiate a manual workflow by sending it content. Your administrator sets up rules for the types of content that can be sent to a workflow. For example, you might be allowed to send purchase order spreadsheets to a PO approval workflow but not photos.



Note: The names of workflows and their location on menus are determined by your administrator.

Send content to a workflow:

1. In a Doclist, navigate to the content you want to send to a workflow, then point to a document and click **Workflows** > <Name of your workflow>. To send multiple documents to a workflow, select the check boxes next to the documents and click **Workflows** > <Name of your workflow> on the **Action Bar**.

Smart View evaluates the documents to ensure they are permitted to enter the workflow. A message appears listing the items that are incompatible and will be excluded. The documents that are accepted become the workflow's working files. The working files are the primary pieces of content that require attention and processing in the workflow, for example, a purchase order spreadsheet or expense report PDF.

2. Complete each panel that is presented, clicking **Next** to move to the next panel in the process. Required fields are marked with an asterisk. Your input can include general notes, performers or members of your organization who will take part in processing the tasks in the workflow, documents, process variables, and the schedule for the workflow.

- The **Documents** panel allows you to view and, if necessary, change the working files you selected in **step 1**. To change a file, point to it on the **Working files** tab and click **+** to select a replacement. Depending on the workflow, you might also be able to add supporting files through the **Supporting files** tab.

Depending on how the workflow is configured, you might be required to add additional working files. For example, in a medical claim workflow initiated with a health insurance policy document, you might be required to add a claim form. If this is the case, placeholders for the files appear on the **Working files** tab. You might also be able to add optional documents such as a medical report. To add these files, point to the file's placeholder, click **+**, and select the file. To remove a file, point to it and click **X**.

Only files with a placeholder can be added to a workflow. All working files must be compatible with the workflow, and any working files that are mandatory are marked with an asterisk. The **Next** button is not activated until you have added all mandatory files.

- The **Schedule** panel allows you to enter **Launch on**, **Due**, and **Follow-up** dates, as well as choose if notifications should be sent to performers when the workflow starts.
- The **Process Variables** panel allows you to enter data or information that is processed and updated throughout the workflow.

! Important

If you change a working file in the **Documents** panel, process variables do not get updated. Cancel the workflow and start again with the correct content.


3. Click **Finish** when you have completed all required panels.

A message appears indicating the status of the workflow, and tasks are sent to performers.


4.2.2 Navigate workflows

Your administrator can add a workflow monitoring tile on the Landing page and can configure the name of the tile. It is often called **My Workflows**.

The tile features a circle graph that shows the percentage of your active workflows that are **Scheduled**, **Running**, or **Paused**.

- Click  on the tile to open the **Workflows List**, where you can search and filter workflows. Click a segment in the circle graph to open the list filtered to your selection.
- In the **Workflows List**, you can perform actions on individual workflows by pointing to a workflow and selecting actions on the **Inline Action Bar** such as **Pause workflow** and **Change supervisor**. Click a workflow in the list to open the **Workflow Details** view (see *“Work with workflows” on page 81*).

The following workflow states are represented in the list:

- **Scheduled**: Workflow is scheduled to start on a certain date and time.
 - **Running**: Workflow has started and tasks are currently in progress.
 - **Paused**: Workflow progress has stopped temporarily.
 - **Aborted**: Workflow is permanently stopped before completion.
 - **Finished**: Workflow is completed with all tasks and conditions satisfied.
- To refresh the **Workflows List** and workflow statuses, click the **Refresh** button  on the header.

4.2.3 Search for workflows

Your administrator can configure a tile on the Landing page that allows you to search for specific workflows. The name of this tile is chosen by your administrator, but is often called **Search Workflows**.

When you click this tile, a panel appears that allows you to search workflows by criteria such as **Document name**, **Template name**, **User type**, **State**, and **Overdue workflows**. When selecting a **Template name**, you can select a template **Version**, with the current version labeled as **CURRENT**. After you enter your criteria, click **Search** to view your results.





Your administrator can also configure URL link tiles on the Landing page that run a search for specific types of workflows. For example, you might see a tile named **Search For Overdue Workflows** that will return a list of overdue workflows.

4.2.4 Work with workflows

Click a workflow in the **Workflows List** to open the **Workflow Details** view. The view features three panes:

1. The **Workflow list** pane lists the workflows assigned to you.
2. The **Overview** pane that allows you to inspect the individual tasks within the workflow in a timeline in ascending order.
3. The **Details** pane that provides information about the workflow, including supervisor and start date, associated working files and supporting files, and notes.

Do any of the following:

- Click the **More actions** button  to access actions that can be performed on the workflow, such as **Pause Workflow** and **Update Performers**.
- In the **Overview** pane, click  to change the view of the workflow timeline to isolate **Manual Tasks**, **Automatic Tasks**, **All Tasks**, or **Workflow Events**. Your administrator might have configured additional task filters to meet the specific needs of your organization.
- Click a task in the timeline to open the **Task Details** view. For more information, see [“Work with tasks” on page 85](#).
- Select a task in the timeline, then click the **More actions** button  to access task-specific actions such as **Rerun Task** or **Accept**.
- Click **View Recent Note**  on a task to view the last note added to the task.
- Select the **Working files** and **Supporting files** tabs on the **Details** pane to access files attached to the workflow. If the workflow configuration permits, you can

add supporting files. Point to a file to display the **Inline Action Bar** or select one or more files to display the **Action Bar**. The options on the bars allow you to perform actions, such as view file properties, download a file, copy a link to the file, and go to the file's location.

- Select the **Notes** tab in the **Details** pane to view and add notes to a workflow.

4.2.5 Workflow actions

The following actions can be performed on workflows.



Note: Some of these actions might not be supported depending on your Smart View configuration.

Send content to workflow

In a Doclist, point to a document and click **Workflows > <Name of your workflow>**. To send multiple documents, select the documents and click **Workflows > <Name of your workflow>** on the **Action Bar**. For more information, see [“Send content to a workflow” on page 79](#).

Start a workflow before the scheduled start time

In the **Workflows List** or the **Workflow Details** view, point to a Scheduled workflow and select **Start Workflow**. The workflow changes to Running state and performers are notified of their tasks.



Note: **Start Workflow** is available only when the workflow is in a Scheduled state.

Pause a workflow

In the **Workflows List** or the **Workflow Details** view, point to a Running workflow and select **Pause Workflow**. The workflow changes to Paused state.



Note: **Pause Workflow** is available only when the workflow is in a Running state.

Resume a workflow

In the **Workflows List** or the **Workflow Details** view, point to a Paused workflow and select **Resume Workflow**. The workflow changes to Running state.



Note: **Resume Workflow** is available only when the workflow is in a Paused state.

Change workflow supervisor

In the **Workflows List** or the **Workflow Details** view, point to a workflow and select **Change Supervisor**. Select the user who will act as the supervisor of the workflow.

Abort a workflow

In the **Workflows List** or the **Workflow Details** view, point to a workflow and select **Abort workflow**. This option is available when the workflow is in a Running or Paused state.

This action terminates the workflow. Administrators and the supervisor of a workflow can perform this task.



Notes

- Aborting workflows might leave the working documents in an inconsistent state, depending on business rules that might have been applied to the working documents prior to the abort action.
- If you abort a workflow that includes a digital signature request, the digital signature request is cancelled.

Email a workflow supervisor

In the **Workflows List** or the **Workflow Details** view, point to a workflow or an associated task and select **Email to Supervisor**.



Note: The email cannot be sent to the logged-in user.

Email workflow performers

In the **Workflows List** or the **Workflow Details** view, point to a workflow or associated task and select **Email to Performers**. This option is not available for tasks in a Future state. If the task is in a Pending state, the entire group's email addresses will be included. If the task is in a Completed or Acquired state, only the users who performed the task will be emailed.





Note: The maximum length of the mailto: address string is 2,046 characters. The email cannot be sent to the logged-in user.

Update workflow performers

In the **Workflows List** or the **Workflow Details** view, point to a Scheduled, Running, or Paused workflow and select **Update Performers**.

Add a note to a workflow

In the **Workflows List**, point to the workflow and click **Add Note** . Click

Notes  to review existing notes and add additional notes.

Access workflow files

In the **Workflow Details** view, select the **Working files** and **Supporting files** tabs to access the workflow's files. If the workflow configuration permits, you can add supporting files.

Point to a file to display the **Inline Action Bar** or select one or more files to display the **Action Bar**. The options on the bars allow you to perform actions, such as view file properties, download a file, copy a link to a file, and go to a file's location.

View a document's workflows

In a Doclist, point to a document that is associated with a workflow and click **Workflow History** or **View Workflows** (your environment might have a different name). The **Workflows List** opens displaying the document's associated workflows.

If the **Show markup status** switch is turned on in **Settings**, a status icon appears in a Doclist for documents that have workflows associated with them. Point to the icon to view the number of associated workflows. Click the icon to view the associated workflows in the **Workflows List**.

4.3 Tasks

Tasks are workflow assignments that can be directed to individual users for resolution. Once a workflow starts, the tasks are sent to the designated users. Content passes through the workflow as users acquire, accept, reject, and delegate tasks. Users and administrators can designate specific users to perform specific tasks.



Note: Your administrator can configure Smart View to automatically accept tasks on your behalf, and might restrict other actions you can perform on the task.

4.3.1 Navigate tasks

Your assigned tasks appear in the **My tasks** tile on the Landing page. The tile in your environment might have a different name. The tasks are sorted in descending order by **Sent Date**, so the most recent task is at the top of the list. Unread tasks appear in bold type.

The task state is represented by the following task icons:



Task not acquired



Task acquired



Task paused






Task rejected



Task delegated

Actions you can perform when navigating tasks

- Click  on the **My Tasks** tile to open the **Tasks List** where you can perform additional actions, and sort and filter your tasks.
- Click a task in the **Tasks List** to open it in the **Task Details** view (see [“Work with tasks” on page 85](#)).







- Click  to perform a full-text search on the tasks in the file.
- Point to a task and click the **More actions** button  to access common actions for the task, such as **Acquire**, **Accept**, and **Reject**.

4.3.2 Work with tasks




Click a task in the **Tasks List** to open it in the **Task Details** view, where you can perform actions on the task, view its properties or process variables, and access working and supporting files. The view features three panes:


1. The **Task list** pane lists the tasks that are assigned to you.
2. The **Details** pane displays details of the task.
3. The **Task files** pane displays tabs with access to the task's working files, supporting files, notes, processing variables, and other information. The available tabs depend on your configuration.


Do any of the following:


- To view a task's details in the **Details** pane, click the task in the **Task list**. You can refresh the list by clicking .
- To perform primary actions on a task, such as **Accept** and **Reject**, use the buttons on the view's header. To perform other actions, such as **Add Note** and **Mark as Unread**, click the **More actions** button .
- To view files processed by the task, select the **Working files** tab. Click a file to open it in a viewer (see ["Open content in a viewer" on page 35](#)). Open the tab's expanded view by clicking .
- If a working file is related to other files, the number of relations appears under the file name. Click the **Relations** count box to view a list of the related files. Click a file to open its **Overview** page. Click **Properties** to view the related file's properties on the **Properties** page. Click the other buttons to open, download, edit, and copy a link to the file. Click  next to **Properties** to access actions you can perform on the related file.
- Depending on how a task's workflow is configured, you might be required to add one or more additional working files before processing the task. For example, a task might be a step in a medical claim workflow in which you are required to add a claim form that will be approved in a later task. If this is the case, placeholders for the files appear on the **Working files** tab. You might also be able to add optional working files, such as a medical report. To add these files, point to the file's placeholder, click , and select the file. To remove a file, point to it and click **Remove** .


Only files with a placeholder can be added to a task. All working files must be compatible with the workflow, and any working files that are mandatory are marked with an asterisk. You cannot process a task until you have added all mandatory files.


- To view files that are associated with a task for background and support purposes, select the **Supporting files** tab. Click a file to open it in a viewer. Add additional supporting files by clicking **+**. Remove a supporting file by pointing to the file and clicking **Remove**. Open the tab's expanded view by clicking .
- To view and edit a file's properties on the **Properties** page, point to the file and click . File properties depend on the file's creation profile (see ["Create new content" on page 49](#)). To access actions you can perform on the file, click  next to the file's name. The available actions depend on your configuration. Click


 next to **Properties** to access the file's versions, relations, locations, renditions, permissions, and audits. The available menu items depend on your configuration.

On the **Versions**, **Relations**, **Locations**, **Renditions**, **Permissions**, and **Audits** pages, you can perform many of the same actions you can perform on the **Properties** page. For example, on the **Versions** page, you can click a version to open it in a viewer, and point to a version and click  to view and edit its

properties. And on the version's **Properties** page, you can click  next to **Versions** and click **Audits** to view the version's audit report.

- To view a file's versions in grouped mode, point to the file and click **Grouped versions**. You might need to click the **More actions** button . In the grouped versions view, file versions are grouped first by minor version of the current version, and second by major version. Click a version in the version list to view its properties and open it in the viewer. The properties of a version depend on the file's creation profile (see ["Create new content" on page 49](#)). On the version's **Properties** page, do any of the following:

- To access a version's relations, renditions, and locations, click  next to **Properties**. The available options depend on your configuration. On the **Relations**, **Renditions**, and **Locations** pages, you can perform many of the same actions you can perform on the **Properties** page.

- To view the minor versions of a major version in the list, select the version, click  next to **Properties**, and click **Versions**.

- On the **Working files** and **Supporting files** tabs, point to a file to display the **Inline Action Bar** or select one or more files to display the **Action Bar**. The

options on the bars allow you to perform actions, such as go to a file's location, copy a link to a file, download a file, export a file, edit a file, and import a file rendition. The available actions depend on your configuration.

- To view and add notes to the task, select the **Notes** tab.
- To view the list of variables being tracked through the task's workflow, if any, select the **Process variables** tab. In some tasks, you might be required to edit the variables.



Note: In the **Task Details** view, you have the option to work with tasks in context. For more information, see [“Work with tasks in context” on page 87](#).

4.3.3 Work with tasks in context




In the **Task Details** view, you have the option to work with tasks in context. In this mode, the focus of the view is task content, and content information and actions can be accessed quickly and easily while staying within the context of the task.

To switch to this mode, turn it on in your user settings. For more information, see **Quick access to task attachments** in [“User settings” on page 17](#).


In this mode, the **Task Details** view features three panes:

1. The **Task list** pane lists the tasks that are assigned to you.
2. The **Task information** pane provides access to the task's content, including working files, supporting files, notes, details, performers, and process variables.
3. The **Preview** pane displays files selected in the **Task information** pane in a viewer. For more information about viewers, see [“Open content in a viewer” on page 35](#).










Do any of the following:


- To display a task's content in the **Task information** and **Preview** panes, click the task in the **Task list**. You can refresh the list by clicking .
- To perform primary actions on a task, such as **Accept** and **Reject**, use the buttons on the view's header. To perform other actions, such as **Add Note** and **Mark as Unread**, click the **More actions** button .
- To view a list of files processed by the task, select the **Working files** tab (selected by default). Click a working file to open it in the viewer. Open the tab's expanded view by clicking .




Depending on how a task's workflow is configured, you might be required to add one or more additional working files before processing the task. For example, a task might be a step in a medical claim workflow where you are required to add a claim form that will be approved in a later task. In this case, placeholders for the files appear on the **Working files** tab. You might also be able


to add optional working files, such as a medical report. To add these files, point to the file's placeholder, click **+**, and select the file. To remove a file, point to it and click **Remove** .

Only files with a placeholder can be added to a task. All working files must be compatible with the workflow, and any working files that are mandatory are marked with an asterisk. You cannot process a task until you have added all mandatory files.

- To view a list of files that are associated with the task for background or support purposes, select the **Supporting files** tab. Click a supporting file to open it in the viewer. Add additional supporting files by clicking **+**. Remove a supporting file by pointing to the file and clicking **Remove**. Open the tab's expanded view by clicking .
 - To view children of working or supporting files that are virtual documents, click  next to the virtual document. Click a child document to open it in the viewer.
 - To perform actions on working files and supporting files, point to a file and click an action on the **Inline Action Bar**. You might need to click the **More actions** button . Actions can include **Go to location** , **Copy link**, **Download**, **Export properties**, **Edit**, and **Import rendition**.
 - To view and edit a file's properties, including children of virtual documents, point to the file and click . The properties of a file depend on the file's creation profile (see *"Create new content" on page 49*). On the **Properties** page, do any of the following:
 - In the file list pane, toggle between working and supporting files, and select files to view their properties.
 - To open a file in the viewer, click the **Preview** button .
 - To edit file properties, click the **Edit** button.
 - To access actions you can perform on a file, such as copy a link and download, click  next to the file's name. The available actions depend on your configuration.
 - To access a file's versions, relations, locations, renditions, permissions, and audits, click  next to **Properties**. The available options depend on your configuration.
- On the **Versions**, **Relations**, **Locations**, **Renditions**, **Permissions**, and **Audits** pages, you can perform many of the same actions you can perform on the **Properties** page. For example, on the **Versions** page, you can click a version to open it in a viewer, and point to a version and click  to view and edit its

properties. And on the version's **Properties** page, you can click  next to **Versions** and click **Audits** to view the version's audit report.

- To view a file's versions in grouped mode, point to the file and click **Grouped versions**. You might need to click the **More actions** button . In the grouped versions view, file versions are grouped first by minor version of the current version, and second by major version. Click a version in the version list to view its properties and open it in the viewer. The properties of a version depend on the file's creation profile (see ["Create new content" on page 49](#)). On the version's **Properties** page, do any of the following:
 - To access a version's relations, renditions, and locations, click  next to **Properties**. The available options depend on your configuration. On the **Relations**, **Renditions**, and **Locations** pages, you can perform many of the same actions you can perform on the **Properties** page.
 - To view the minor versions of a major version in the list, select the version, click  next to **Properties**, and click **Versions**.
- To view and add notes to a task, select the **Notes** tab in the **Task Information** pane.
- To view details of a task, select the **Task Details** tab in the **Task Information** pane.
- To view and update task performers, select the **Task performers** tab in the **Task Information** pane.
- To view the variables being tracked through a task's workflow, if any, select the **Process variables** tab in the **Task Information** pane. In some tasks, you might be required to edit the variables.

 **Note:** Depending on your configuration, the **Task information** pane might have additional custom tabs, such as **Audits**. For more information on these tabs, contact your administrator.

4.3.4 Task actions


You can perform the following actions on tasks:


Notes

- Some of these actions might not be supported depending on your Smart View configuration.
- Primary actions such as **Accept**, **Reject**, and **Delegate** can be custom-labelled by your administrator. For example, instead of **Accept**, you might see **Approved without comments**.


- The number of displayed tasks might be limited by your administrator. Use filtering to view items beyond the limit.

Filter the Task list

In the **My tasks** tile, expand the view by clicking .

In the **Tasks List**, click  to refine the tasks shown in the list.

Search for tasks

In the **My Tasks** tile, click  to conduct a text search of the subjects of the tasks in your list.

In the **Tasks List**, you can perform searches on column headings such as **Subject** and **Sender**.

Acquire a task (indicate that you will perform the task and mark the task as read)

In the **My Tasks** tile or the **Tasks List**, point to the task and select **Acquire** (or equivalent custom action).

In the **Task Details** view, click the **Acquire** button on the view's header (or equivalent custom action).



Note: Depending on the configuration of the workflow, a task might be acquired immediately when you view the details of the task.

Accept a task (confirm that the task has been completed and quality of response is acceptable and can move forward in the workflow)

In the **My Tasks** tile or the **Tasks List**, point to the task and select **Accept** (or equivalent custom action).

In the **Task Details** view, click the **Accept** button on the view's header (or equivalent custom action).

Depending on your configuration, the task is accepted and closed immediately, or Smart View might initiate an acceptance process that could require you to update properties, provide an electronic signature, add signers, or complete associated tasks.

Reject a task (confirm that the task is completed or its quality was not acceptable and must move back in the workflow)

In the **My Tasks** tile or the **Tasks List**, point to the task and select **Reject** (or equivalent custom action).

In the **Task Details** view, click the **Reject** button on the view's header (or equivalent custom action).

Depending on your configuration, the task is rejected and closed immediately, or Smart View might initiate a process that could require you to update properties, provide an electronic signature, or complete associated tasks.

Delegate a task (send the task to a specified user for acquisition, acceptance, or rejection)

In the **Tasks List**, point to the task and select **Delegate** or the equivalent custom action.

In the **Task Details** view, click ******* on the view's header and click **Delegate** (or equivalent custom action).

Depending on your configuration, you can add a note. The note appears as part of the task notes.

Pause a task or resume a task

In the **Tasks List**, point to the task and select **Pause task** or **Resume task** (or equivalent custom action).

In the **Task Details** view, click ******* on the view's header and click **Pause** or **Resume** (or equivalent custom action).



You can pause only tasks without an owner. When tasks are paused, they no longer appear in lists of active tasks, such as a workflow manager's inbox.

Modify or view process variables

In the **Task Details** view, select the **Process variables** tab in the **Details** pane to view the current process variables. If you are working with tasks in context in the **Task Details** view (see *"Work with tasks in context" on page 87*), select the **Process Variables** tab in the **Task information** pane.

The variables are read-only. If you accept or reject the task, the process variables might become editable based on their configuration. Select the variable you want to modify and make the required changes or retain the value. The tab's label can be customized by your administrator.

Access working files and supporting files


In the **Task Details** view, select the **Working files** or **Supporting files** tab, then point to a file and click **Properties** . The file's properties are displayed on the **Properties** page. To open the file in a viewer, click the **Preview** button .

On the **Properties** page, you can access the full list of working and supporting files for the task in the file list pane, view the properties of each file, and open each file in a viewer.

On the **Working files** or **Supporting files** tabs, point to a file to display the **Inline Action Bar** or select one or more files to display the **Action Bar**. The options on the bars allow you to perform actions, such as view file properties, download a file, copy a link to a file, and go to a file's location.

Access related files

Working files can feature related files. In the **Task Details** view, point to a file's **Relations** count box on the **Working files** tab to open a pop-up list of related files. Click a file to open its **Overview** page. Click **Properties** on the page to view



the file's properties on the **Properties** page. Click  next to **Properties** to access the file's permissions, versions, relations, renditions, locations, and audit report.

If you are working with tasks in context in the **Task Details** view (see *"Work with tasks in context" on page 87*), point to the file on the **Working files** tab in

the **Task information** pane and click **Properties** . On the **Properties** page,

click  next to **Properties** and click **Relations**.

Add working files

In the **Task Details** view, select the **Working files** tab, point to the file's placeholder, click , and select the file. To remove a working file, point to it and click **Remove** .

The ability to add working files to a task depends on the configuration of the workflow. Only files with a placeholder can be added to a task, and mandatory files are marked with an asterisk. For more information, see [“Work with tasks” on page 85](#).

Add supporting files

In the **Task Details** view, select the **Supporting files** tab, click , and select the file. To remove a file, point to it and click **Remove** .

You can also add a supporting file on the **Relations** page. In a typical case, a user adds a supporting file from one of the files related to the working files.

Point to a working file on the **Working files** tab and click . Click  next to **Properties** and click **Relations**. Point to a file in the **Relations** list and click **Add as supporting file**.


Add a note to a task

In the **Tasks List**, point to the task and select **Add note**.

In the **Task Details** view, select the **Notes** tab and click .

Change task priority


In the **Tasks List**, point to the task and click **Change Task priority**.

In the **Task Details** view, click the **More actions** button  on the view's header and select **Change Task priority**. Select a priority in the list: **Highest**, **High**, **Normal**, **Low**, or **Lowest**.


Toggle read or unread status of a task

If you open an unread (but acquired) task in the **Task Details** view, the task status automatically changes to Read.

In the **Tasks List**, point to the task and select **Mark as Read** or **Mark as Unread**.


In the **Task Details** view, click the **More actions** button  on the view's header and select **Mark as Read** or **Mark as Unread**.

Review a list of task performers and update performers


In the **Task Details** view, click  next to **Properties** and click **Task performers**.

If you are working with tasks in context in the **Task Details** view (see “[Work with tasks in context](#)” on page 87), select the **Task performers** tab in the **Task information** pane.



Note: You can update the list of performers by pointing to each performer type row and clicking .

Abort a workflow

In the **Tasks List**, point to the task and select **Abort workflow**. You might need to click the **More actions** button .


This action terminates the workflow. Only administrators and the supervisor of a workflow can perform this task.



Note: Aborting workflows might leave the working documents in an inconsistent state, depending on business rules applied to the working documents prior to the abort action.


Run an automatic task again

This action allows you to manually re-run an automatic task that is in a Faulted state.


In the **Overview** pane of the **Workflow Details** view, click an automatic task, click the **More actions** button , then select **Rerun task**.

Complete an automatic task

This action allows you to manually complete an automatic, Running task, setting its state to Finished.

In the **Overview** panel of the **Workflow Details** view, click an automatic task, click the **More actions** button , then select **Complete task**.

View a working or supporting file's versions in grouped mode

In the **Task Details** view, point to the file, click the **More actions** button , and click **Grouped versions**. In the grouped versions view, file versions are grouped first by minor version of the current version, and second by major version. Click a version in the version list to view its properties and open it in the viewer. The properties of a version depend on the file's creation profile (see “[Create new content](#)” on page 49).

4.3.5 Tasks with digital signatures

If Smart View is configured with a digital signature provider, accepting a task might require you to send a signature request. The following are details about tasks with digital signatures:

Choosing signers

- You can send users a request to digitally sign a document. Depending on your configuration, you can also send the document to someone without an account by entering their email address. This allows you to send signature requests to people inside your organization who do not use OpenText Documentum CM, and even to people outside of your organization.
- Depending on your configuration, you can send documents in their native format, as well as PDF Configuration Print and Export formats.
- Depending on your configuration, when adding signers to a task with a digital signature, you can define the signing order to create groups of signers. Each member of a group must sign the document before the next group receives the digital signature request.

! Important

If the digital signature provider is DocuSign, after the envelope is created on the DocuSign portal, do not change the recipient's email or type, or the **Needs to Sign** option. You can add more recipients in the DocuSign portal, but you cannot change the recipients selected in Smart View.

Included documents

- When you complete a workflow task with a digital signature, the workflow's working file is sent for signature. Depending on the digital signature provider, if a task has more than one working file, only the first file might be sent.
- When a document is sent for digital signature, it is locked in Smart View until all signing tasks are complete.
- Workflow supporting files are included with the signature request but do not need to be signed. The signer can review these files when reviewing the signature request. If there are multiple supporting files, you are prompted to select which files to include in the digital signature request when completing the task.

After documents are signed

- After all signers complete their tasks, the document is added back to Smart View. Your configuration determines if it is added as a major or minor version, or if it is added as the same version.
- A signing log is created. Your administrator can configure where it is saved and if you can access it.

4.3.6 Tasks with process variables

Some tasks include process variables, which are pieces of data or other kinds of information that are tracked throughout the task's workflow. When you acquire a task, you might be required to update the variables. Depending on how the process variables are configured, you might need to add a value, text, or date, update a toggle or selection, or enter a boolean expression.

There are a few limitations on the process variables that you can enter:

- Numbers without decimals that are longer than 10 digits round to 10 digits.
- Numbers cannot have more than 14 digits following a decimal. Numbers round to 14 digits after the decimal.

4.4 Lifecycles

A *lifecycle* is a sequence of states that you can move content through. Lifecycles are used to:

- Indicate the status of the content as it passes from one business protocol to another.
- Apply and change content retention and markup policies.

Lifecycle states are promoted (or demoted) in sequential order using a set of conditions and following states. Your administrator can configure a promotion to display a prompt that requests electronic signatures or properties updates. The lifecycle does not progress until these prompts are completed.

The following table describes an example lifecycle:

Table 4-2: Example lifecycle

State	Entry condition	Next state
Draft	None	Reviewed
Reviewed	Content is in Draft state	Draft Approved: requests electronic signature
Approved	Content is in Reviewed state Content is a PDF	None

In this example:

- Content can be promoted from Draft to Reviewed to Approved. Content can progress by repeatedly going to Draft after Reviewed.
- If you promote a PDF from Reviewed to Approved, the system confirms the entry conditions have been met. If this promotion requests an electronic

signature, a prompt appears. When you electronically sign the approval, the system promotes the state to Approved.

- If you try to promote a spreadsheet instead of a PDF, the system rejects the promotion request because one of the entry conditions was not met.

Administrators can configure lifecycle batches, which automatically change content properties based on configured frequency and trigger state.



Note: Depending on how a lifecycle was configured, you might also need to complete an electronic signature when progressing from one state to another.

4.4.1 Send content to a lifecycle state

1. In a Doclist, navigate to the file or files (see [“Multi-file lifecycle support” on page 96](#)) you want to send to a lifecycle, then point to the file(s) and click **Lifecycle** > **<Name of your lifecycle state>**.

The system evaluates the file to ensure it is permitted to enter the state. If your file is not eligible, a message appears listing the incompatibilities.

2. Repeat step one each time you need to promote (or demote) the content to the next state in the lifecycle.

If configured by your administrator, you might need to provide an electronic signature or make a properties update when you change the state.



Note: In some cases, your administrator might permit you to override the usual progression of the lifecycle states through direct state transitions. For example, if the state progression of your lifecycle usually follows Draft, Reviewed, Released, Archived, you might have a menu item labelled **Move to Archived** that allows you to force a state change from Draft to Archived. The states in the process that you skip are not evaluated. Only the conditions for the target state are considered.

4.4.2 Multi-file lifecycle support

You can apply a new lifecycle or perform a lifecycle state change on multiple files. You can do this from a Doclist, **Favorites**, **Checked Out**, **Recently Accessed**, **My Shares**, virtual document outline, task attachments, and workflow attachments.

Multiple-file lifecycle state change interaction is classified as two types:

- **Individual processing:** Allows you to capture input for all files individually in sequence before submitting the lifecycle state change.
- **Bulk processing:** Allows you to capture input in bulk for all files before submitting the lifecycle state change.



Note: A minimize option, available on either the side pane or the progress pane, allows you to run a process in the background and continue working.

For example, you can submit a process in the side pane and then see a progress pane containing a minimize option.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Multiple-document lifecycle state change

Multiple document lifecycle state change is driven by two factors:

- Your administrator has allowed bulk lifecycle transitions.
- The selected file's target state meets the criteria defined by your administrator.

Case 1: Individual processing of lifecycle state change for each file:

Bulk transitions are allowed **OR** the lifecycle state of the target state of the selected files is different.

Case 2: Bulk processing of lifecycle state change for all files:

Bulk transitions are allowed **AND** the lifecycle of the target state of the selected files is the same **OR** the lifecycle of the target state of the selected files is different, but the next state configuration for all applicable lifecycles is exactly the same.

4.4.2.1 Individual processing of lifecycle state change

- After selecting multiple files for a lifecycle state change, if the selected files do not resolve with the same or a similar lifecycle next state configuration or bulk transitions are not allowed, the user needs to process files in sequential order.
- In this case, a dialog box opens with a two-pane view.
 - Left pane – Selected files list
 - Right pane – Current file being processed
- The lifecycle state change for a file has the following components, which will be shown in the right pane:
 - Confirmation message
 - e-Signature
 - Properties (dialog box)
- The above UI components are optional, and their appearance is based on the lifecycle next state configuration.

4.4.2.2 Bulk processing of lifecycle state change

- After selecting multiple files for a lifecycle state change, if the selected files resolve with the same or similar lifecycle next state and bulk transitions are allowed, the user can perform a lifecycle state change for all the files in bulk.
- The lifecycle state change for a file has the following components:
 - Confirmation message
 - e-Signature
 - Properties
- The above UI components are optional, and their appearance is based on the lifecycle next state configuration.

4.5 Workflow insights

OpenText Content Aviator for **workflows** is an intelligent assistant that provides insights to help you make informed decisions when reviewing or approving a **task's** content.

When Content Aviator is turned on for a task, the task's working files appear together with one or more *query spaces* consisting of pre-defined prompts relevant to the task and its content. You can select one or more of these prompts to get focused responses that help you process the task quickly and efficiently.


In addition to providing query spaces, Content Aviator allows you to submit your own prompts about a task's working files as well as request summaries of their content.



Note: If you do not see the **Aviator** button and cannot perform the following tasks, Content Aviator might not be turned on for the task, the working files might not be available to Content Aviator, or your administrator might not have assigned a license for your use. For more information, contact your administrator.


Use a task's Content Aviator query spaces




You access a task's query spaces in the **Task Details** view. For more information, see *"Work with tasks"* on page 85.

1. In the **Tasks List**, click the task to open it in the **Task Details** view.
 2. On the **Working files** tab, ensure you have added all mandatory files to the task. If the task has only optional working files, ensure you have added at least one. For more information on adding working files, see *"Work with tasks"* on page 85.
 3. On the view's header, click the **Aviator** button .
- The **Aviator** chat panel opens displaying the available query spaces for the task.

4. Select a query space to display its pre-defined prompts, then select an appropriate prompt.


The response appears below. To copy the response to the clipboard, click the

Copy to clipboard button .

5. Do any of the following:
 - Continue to select and submit prompts as above.
 - To clear the prompt and response history from the panel, click the **New discussion** button .
 - To submit your own prompts, type them in the **Ask me anything about** box. Press **ENTER** or click .
6. To close Content Aviator, click  at the top of the chat panel.

Use Content Aviator on working files


In addition to using query spaces, you can use Content Aviator to summarize or ask questions about content in a task's working files.

1. In the **Tasks List**, click the task to open it in the **Task Details** view.
2. On the **Working files** tab, do any of the following:
 - To use Content Aviator on a specific working file, point to the file and click the **Aviator** button  on the **Inline Action Bar**.
 - To use Content Aviator on multiple working files, select the files and click the **Aviator** button on the **Action Bar**.

The **Aviator** chat panel opens. Depending on your configuration, the file or files open in an in-place viewer. For more information on using viewers, see [“Open content in a viewer” on page 35](#).









Note: Only OpenText Intelligent Viewing supports viewing multiple documents. For more information, see [“View multiple files” on page 44](#). BravaCSR viewer and OpenText Brava! Enterprise open only the first selected document. Note, however, that Content Aviator responses apply to all selected documents.

3. In the chat panel, do any of the following:
 - To get a summary of selected files, click **Summarize this document** or **Summarize the documents**.
 - To ask a question about selected files, type it in the **Ask me anything about** box. Press **ENTER** or click .

Content Aviator responds and lists references to the files the response is based on.

4. Do any of the following:

- To copy the response to the clipboard, click the **Copy to clipboard** button .
 - To open a referenced file in the viewer, click the file's link in the reference list. To return to viewing all the files, click **View all documents** at the top of the chat panel.
 - To open a referenced file's **Overview** page in a new tab, point to the file and click the **Go to document** button . From there, you can open, download, and edit the file. You can also view its **Properties** and copy a link to the file.
 - To translate the response to a different language, enter `Translate to <supported_language>` in the **Ask me anything about** box. Press **ENTER** or click . If the language is supported, Content Aviator returns the translated text.
 - To ask a follow-up question, enter it in the **Ask me anything about** box. Press **ENTER** or click . Content Aviator remembers the context of your previous questions to ensure a seamless conversation.
 - To generate a chart based on the response, type an appropriate question in the **Ask me anything about** box. Press **ENTER** or click .
- For example, after asking Content Aviator to categorize job descriptions found in a document, you can ask it to generate a bar chart showing the number of job descriptions by category. For more information about supported charts, see [“Charts supported in Content Aviator” on page 110](#).
- To dismiss the current conversation and start a new one, click the **New discussion** button .

5. To close Content Aviator, click  at the top of the chat panel.

Chapter 5

Workspaces

A workspace is a special type of content container that is created from a workspace type. Workspaces allow users to collaborate and share information, including metadata, documents, and images, and typically represent a meaningful entity in an organization. Some examples of workspaces are customers, sales opportunities, insurance claims, legal cases, and employee records.

Administrators create workspace types in Admin Console to configure initial settings for a workspace. In Smart View, users create workspaces from workspace types, which derive their initial settings from the workspace type. When users create a workspace, they also select a template. The template defines the workspace's folder structure and, depending on configuration, folder permissions and valid document types. You can think of a workspace type as a blueprint, and a workspace as an instance of that blueprint.


Some workspaces have custom roles that are created by an administrator in Admin Console. Users with the required permission can add users and groups as members of a role in Smart View to control user permissions within the context of the individual workspace.

5.1 The Workspace page


Workspaces open on the Workspace page. The layout of this page is different from other content containers in Smart View. There are two main areas of the page: the workspace header and the documents area.

Workspace header

The workspace header displays workspace metadata, including the name and description of the workspace, the workspace type and template, and workspace

properties. To expand the header, click .

Depending on your permissions, you can edit properties in the workspace header. For more information, see [“Edit workspace properties” on page 103](#).

Click the **More actions** button  to access various actions, including [viewing and editing properties](#), [managing members and roles](#), copying and sharing links to the workspace, designating the workspace as a favorite, viewing permissions, downloading the workspace, and deleting the workspace. Depending on your permissions, you might not be able to perform all these actions.

Documents area

The documents area displays the workspace's folder structure. You can perform actions in the folder structure similar to those you can perform in a Doclist. For more

information, see [“Basic actions” on page 14](#) and [“Content actions” on page 21](#). The only exceptions are you cannot copy and paste an item, and you cannot create links to an item.

You can view items, edit items, add and upload items, and create new folders. As in Doclists, you might be prompted for information based on creation profiles configured by your administrator. For more information, see [“Open content in a viewer” on page 35](#), [“Edit content” on page 50](#), [“Create new content” on page 49](#), [“Upload content” on page 52](#), and [“Add a folder or a cabinet” on page 52](#).


Depending on your permissions, you might not be able to perform all these actions. In addition, folders might be configured so only valid document types can be added to them.

5.2 Find a workspace

Workspace types determine the folders in your repository where workspaces can be created. You can find workspaces by browsing through repository Doclists to find these folders. You can also find workspaces in the ways described below. When you find a workspace, click its name to open it in the [Workspace page](#).

Favorites tile

All workspaces that you designate as a favorite appear on the **Favorites** tile. To

designate a workspace as a favorite, click the **Add Favorites** button  on the workspace's documents area header. For more help, see [“Common tiles” on page 8](#).




Search

See [“Search” on page 30](#).

5.3 Create a workspace

You can create a workspace in a folder that is configured to allow it. The workspace type determines the valid folders. When you create the workspace, you select the workspace type and the workspace template.

Create a workspace:

1. In the folder where you want to create the workspace, click **Add item**  and choose the workspace type and template.
2. In the **Create workspace** panel, enter a name for the workspace and click .
3. **Optional** To create another workspace, click **Workspaces**  and follow the same steps.
4. In the **Edit properties** panel, enter properties as needed. If you are creating more than one workspace, enter properties for each workspace, selecting the workspace name as needed.



5. Click **Create**.



After you create a workspace, if you have the required permissions, you can add users and groups as members of the workspace's roles. Roles vary by workspace type, and not all workspace types have roles. For more help, see "[Workspace members and roles](#)" on page 103.

5.4 Edit workspace properties

Depending on your permissions, you can edit a workspace's properties.

Edit workspace properties:

1. On the workspace header, click the **More actions** button , and then click **Properties**.
2. In the **Workspace Information** panel, on the **Properties** tab, click the **Edit** button .
3. Edit properties as required and click **Save Properties**.

You can also edit properties inline on the workspace header. Point to the property and click the **Edit** button . Edit the property and click .

5.5 Workspace members and roles

If roles have been created for a workspace's workspace type, users with the appropriate permission can manage role membership in the workspace by adding users and groups to these roles. Roles allow workspace administrators to create custom permissions that apply only to the users that are added as members of a role in a workspace. In this way, roles allow permissions to be applied only within the context of the individual workspace.

For example, an administrator might want to grant custom supervisory permissions to a group of certain users only within the context of a certain workspace. The administrator can create a Supervisor role for the workspace type. Later, in that workspace, those users can be added to the role as members. In this scenario, a User1 might be assigned to the Supervisor role in Workspace A but not in Workspace B. User1, then, has supervisory permissions only within the context of Workspace A.

5.5.1 View members and roles

All users can view a workspace's roles and its members.

View workspace roles and its members:

- On the workspace header, click the **More actions** button , and then click **Members**.






Note: Not all workspaces have roles. If no roles have been defined for a workspace, a **No members found** message appears.

5.5.2 Add members to roles

You can add both users and groups to a role.



Add members to a role:

1. On the workspace header, click the **More actions** button , and then click **Members**.
2. In the **Workspace information** panel, select **Members**.
3. Click the role's **Add member** button .
4. Click the **Select user or group** box and select the user or group you want to add. To search for a user or group, start typing the name. Results are filtered as you type.
5. Click .

The user or group appears under the role's name.

5.5.3 Remove members from roles

Remove a member from a role:

1. On the workspace header, click the **More actions** button , and then click **Members**.
2. In the **Workspace information** panel, select **Members**.
3. Point to the user or group you want to remove and click **Remove** .

Chapter 6

Content Aviator

Content Aviator is an intelligent assistant that allows you to summarize or ask natural language questions about content in your OpenText Documentum CM repositories.

If your administrator has turned on Content Aviator in your environment and designated folders or virtual documents as *Aviator assignments*, you can open an interactive chat panel and initiate natural language conversations to get information about these folders and virtual documents and their contents. You can ask your questions in a number of supported languages, and Content Aviator responds using the same language.



Notes

- Your search data is protected and will not be used to train our AI models.
- Content Aviator is now configured in Admin Console. For more information, see *OpenText Documentum Content Management - Content Aviator Administration Help (EDCADC-H-AAV)*. A warning might appear on the Landing page if the Content Aviator tile configuration has not been removed in client configuration. If this is the case, contact your administrator.

Content supported by Content Aviator

When a folder or virtual document is designated as an Aviator assignment, users can ask questions about its contents. Users can also ask Content Aviator to summarize content.




Content Aviator supports content when the following conditions are met:


- Content is in a folder or virtual document designated as an Aviator assignment.
- The user has permission to access the content.
- Content has a native format with searchable text (full-text indexable). Renditions are not supported.
- An administrator has assigned a Content Aviator license to the user.

6.1 Use Content Aviator on documents


You will typically use Content Aviator on designated documents in a Doclist. Depending on your configuration, you might be able to use Content Aviator in other locations, such as the **Favorites** list page and the **Search Results** page.


Use Content Aviator on documents:

1. Do any of the following actions:
 - To use Content Aviator on the contents of a folder, open the folder and, on the Doclist header, click the **Aviator** button . The **Aviator** chat panel opens.
 - To use Content Aviator on a document in a folder, point to the document and click the **Aviator** button . To use Content Aviator on multiple documents, select the documents and click the **Aviator** button on the **Action Bar**.
 - To use Content Aviator on an older version of a document, in the Doclist, click **Show filters**  and select **All versions** in the **Refine by** pane. If the selected version is older than the version that was current when the document was designated, the **Aviator** button is not available.

 **Tip:** If the **Aviator** button is not available, the folder or documents might not be designated as Aviator assignments, one or more of the documents might not be in a supported format, you might not have Read permission, or your administrator might not have assigned a license for your use. Contact your administrator.







The **Aviator** chat panel opens. Depending on your configuration, if you selected one or more documents, the document or documents open in an in-place viewer. For more information on using viewers, see [“Open content in a viewer” on page 35](#).

 **Note:** Only OpenText Intelligent Viewing supports viewing multiple documents. For more information, see [“View multiple files” on page 44](#). BravaCSR viewer and OpenText Brava! Enterprise open only the first selected document. Note, however, that Content Aviator responses apply to all selected documents.

2. In the chat panel, do any of the following actions:
 - To get a summary of a folder’s contents, click **Summarize this folder**.
 - To get a summary of selected documents, click **Summarize this document** or **Summarize the documents**.
 - To ask a question about a folder’s contents or selected documents, type it in the **Ask me anything about** box. Press **ENTER** or click .

Content Aviator responds and lists references to the documents the response is based on.

3. Do any of the following actions:

- To copy the response to the clipboard, click the **Copy to clipboard** button .
- To open a referenced document in the viewer, click the document's link in the reference list. To return to viewing all the selected documents, click **View all documents** at the top of the chat panel.
- To open a referenced document's **Overview** page in a new tab, point to the document and click the **Go to document** button . From there, you can open, download, and edit the document. You can also view its **Properties** and copy a link to the document.
- To translate the response to a different language, type `Translate to <supported_language>` in the **Ask me anything about** box. Press **ENTER** or click . If the language is supported, Content Aviator responds with the translated text.
- To ask a follow-up question, type it in the **Ask me anything about** box. Press **ENTER** or click . Content Aviator remembers the context of your previous questions to ensure a seamless conversation.
- To generate a chart based on the response, type an appropriate question in the **Ask me anything about** box. Press **ENTER** or click .
For example, after asking Content Aviator to categorize job descriptions found in a folder's documents, you can ask it to generate a bar chart showing the number of job descriptions by category. For more information about supported charts, see ["Charts supported in Content Aviator" on page 110](#).
- To dismiss the current conversation and start a new one, click the **New discussion** button .

4. To close Content Aviator, click  at the top of the chat panel.










Note: If a virtual document is designated as an Aviator assignment, you can use Content Aviator on the virtual document in a Doclist as you would on a simple document. When you point to one of these virtual documents, the **Aviator** button is available on the **Inline Action Bar**. Clicking the button, however, opens only the root document in the Aviator chat panel, and the focus of the chat is only the root document. To use Content Aviator on the full virtual document assembly, see ["Use Content Aviator on virtual documents" on page 108](#).

6.2 Use Content Aviator on virtual documents

You can use Content Aviator on designated virtual documents in the **Virtual Documents** view. For more information about the view, see [“Navigate virtual documents” on page 69](#).




Use Content Aviator on virtual documents:

1. In a Doclist, point to the virtual document and click **Display outline**. You can also select the virtual document and click **Display outline** on the **Action Bar**.
To use Content Aviator on an older version of the virtual document, in the Doclist, click **Show filters**  and select **All versions** in the **Refine by** pane.
 2. Do any of the following actions:
 - To use Content Aviator on the entire virtual document assembly, select the root component and click the **Aviator** button  on the **Properties** panel header.
 - To use Content Aviator on a child virtual document, select the child component and click the **Aviator** button  on the **Properties** panel header.
 - To use Content Aviator with an older version of a virtual document component, point to the component, click the **More actions** button , and then click **Set to version**. Select the **Version** and click **Apply**. Select the virtual document component you want to use Content Aviator on and click the **Aviator** button  on the **Properties** panel header
-  **Tip:** If the **Aviator** button is not available, the virtual document might not be designated as an Aviator assignment, you might not have the required permissions, or your administrator might not have assigned a license for your use. Contact your administrator.
- The **Aviator** chat panel opens. Depending on your configuration, the documents assembled in the virtual document open in an in-place viewer. For more information on using viewers, see [“Open content in a viewer” on page 35](#).
-  **Note:** Only OpenText Intelligent Viewing supports viewing multiple documents. For more information, see [“View multiple files” on page 44](#). BravaCSR viewer and OpenText Brava! Enterprise open only the first selected document. Note, however, that Content Aviator responses apply to all selected documents.
3. In the chat panel, do any of the following actions:
 - To get a summary of the documents assembled in the virtual document, click **Summarize the virtual document**.

- To ask a question about the documents, type it in the **Ask me anything about** box. Press **ENTER** or click ➤.

Content Aviator responds and lists references to the documents the response is based on.

4. Do any of the following actions:

- To copy the response to the clipboard, click the **Copy to clipboard** button .
- To open a referenced document in the viewer, click the document's link in the reference list. To return to viewing all the documents, click **View all documents** at the top of the chat panel.
- To open a referenced document's **Overview** page in a new tab, point to the document and click the **Go to document** button . From there, you can open, download, and edit the document. You can also view its **Properties** and copy a link to the document.
- To translate the response to a different language, type `Translate to <supported_language>` in the **Ask me anything about** box. Press **ENTER** or click ➤. If the language is supported, Content Aviator responds with the translated text.
- To ask a follow-up question, type it in the **Ask me anything about** box. Press **ENTER** or click ➤. Content Aviator remembers the context of your previous questions to ensure a seamless conversation.
- To generate a chart based on the response, type an appropriate question in the **Ask me anything about** box. Press **ENTER** or click ➤.
For example, after asking Content Aviator to categorize job descriptions found in a virtual document, you can ask it to generate a bar chart showing the number of job descriptions by category. For more information about supported charts, see [“Charts supported in Content Aviator” on page 110](#).
- To dismiss the current conversation and start a new one, click the **New discussion** button .

5. To close Content Aviator, click ✕ at the top of the chat panel.

6.3 Charts supported in Content Aviator

Content Aviator supports the following charts:

Single-view plots

- Bar charts
- Histograms, density plots, and dot plots
- Scatter plots and strip plots
- Line charts
- Area charts and streamgraphs
- Table-based plots
- Circular plots
- Advanced calculations

Composite marks

- Error bars and error bands
- Box plots

Layered plots

- Labeling and annotation
- Other layered plots (candlestick chart, ranged dot plot, bullet chart)

Multi-view displays

- Faceting (trellis plot/small multiples)
- Repeat and concatenation

Maps (geographic displays)

- Choropleths
- Faceted maps
- Projection explorers



Note: For information about generating charts with Content Aviator, see [step 3](#) in “Use Content Aviator on documents” on page 106 and [step 4](#) in “Use Content Aviator on virtual documents” on page 108.

Chapter 7

Sensitivity labels

Sensitivity labels from Microsoft Purview Information Protection allow organizations to classify and protect Microsoft 365 documents across devices, apps, and services. Sensitivity labels control access to content and can be applied with and without protection. Examples of sensitivity labels are *Public*, *Confidential*, and *Highly Confidential*.

Support for sensitivity labels allows OpenText Documentum Content Management (CM) to store and process documents with sensitivity labels while preserving the protection defined by those labels.

Support for sensitivity labels includes the following:

- **Protected storage:** Enables users to store labeled content with label information stored and visible.
- **Protected content processing:** Provides full-text indexing and thumbnail generation for content specified with sensitivity labels.
- **Protected transformation:** Enables PDF renditions of labeled content to be protected with the same sensitivity label as in the original document.

The following document types are supported:


- Microsoft Word (.doc, .docx, .docm)
- Microsoft PowerPoint (.ppt, .pptx)
- Microsoft Excel (.xls, .xlsx)
- Email (.msg)
- Adobe® Acrobat® (.pdf)



Note: Sensitivity labels are now configured in Admin Console. For more information, see *OpenText Documentum Content Management - Microsoft Integrations Administration Help (EDCADC-H-AIN)*. A warning might appear on the Landing page if the MIP tile configuration has not been removed in client configuration. If this is the case, contact your administrator.

7.1 View sensitivity labels

Support for sensitivity labels in OpenText Documentum CM includes the ability to display label names stored with labeled content. Label names can be displayed on **Properties** pages, Doclists, and **Search Results** pages.

- **Properties pages:** Depending on your Smart View configuration, the **Properties** page of a labeled document might display the label's name. To view a document's **Properties** page, in a Doclist, point to the document and click . For more information, see ["View and edit content properties" on page 48](#).
- **Doclists:** Depending on your Smart View configuration, a Doclist might include a column that displays the label name of labeled documents. If you do not see the column, you might be able to add it using **Column settings** on the **Settings** menu. For more information, see ["Basic actions" on page 14](#).
- **Search Results pages:** Depending on your Smart View configuration, a **Search Results** page might include a column that displays the label name of labeled documents. For more information, see ["Search" on page 30](#).

7.2 Understand sensitivity label behavior

Support for sensitivity labels allows OpenText Documentum CM to store and process documents with sensitivity labels while preserving the protection defined by those labels. This section describes the behavior of processes when applied to labeled documents. Labeled documents can be protected or unprotected, and in some cases the behavior varies accordingly.

Viewing documents

- Viewing protected documents is not supported in any of the integrated viewers.
- When attempting to view a protected document, a message appears notifying you that viewing of the document is not supported and giving you the option to download the document.
- Depending on the PDF Configuration in your Smart View environment, the downloaded document is the original document or a PDF rendition. In either case, the downloaded document has the same protection applied (see [Downloading and renditions](#)).

Editing documents

- A protected or unprotected document can be edited the same way as other documents. For more information, see ["Edit content" on page 50](#).
- As part of the edit action, the document is updated with the uploaded content and, if applicable, the label information is also updated.

Importing email documents

- When importing an unprotected email document without any attachments, the mail document is uploaded as normal (see [“Upload content” on page 52](#)).
- When importing an unprotected email document with attachments, the document is uploaded as normal, and the attachments are imported as relations.



Note: Depending on your Smart View configuration, the attachments might not get imported separately from the email document. In this case, they are stored as part of the email document.

- When importing a protected email document without attachments, the document properties are imported and the email document are uploaded without the body of the email.
- When importing a protected email document with attachments, the email attachments are not imported. The document properties are imported and the email document is uploaded without the body of the email.

Importing Office documents

- When importing an unprotected Office document, the document is uploaded as normal (see [“Upload content” on page 52](#)).
- When importing a protected Office document, the document is imported as normal together with the document properties. Permissions to the document and its properties vary depending on your environment’s security configuration.
- When importing a protected Office document together with an unprotected rendition, the rendition fails to upload.

Downloading and renditions (see [“Content actions” on page 21](#))

- Only PDF renditions of labeled documents are supported.
 - When adding a PDF rendition to a protected document, the rendition document must have the same protection as the original file or it will fail to upload.
 - When downloading a protected PDF document that was imported together with a rendition, the rendition is downloaded and retains the same protection.
-

Chapter 8

Reports

The Reports feature allows users to create and access reports and dashboards through the **Reports** Landing page. Users can perform Reports tasks based on the permissions granted to them according to their roles in the organization.

8.1 Reports Landing page

If you have the relevant permission, you can access the **Reports** Landing page by clicking Reports on the **Profile Menu**.

8.1.1 Reports tiles


The **Reports** Landing page comprises default and configured tiles. The tiles that appear on the page depend on your Smart View configuration.

The **Reports** Landing page contains the following default tiles:


- **My Reports:** Lists all the reports that you own.
- **All Reports:** Lists all the reports that you have permission to view.
- **Report Templates:** Lists all the preconfigured report templates available in the repository.
- **My Reports Jobs:** Lists all the report jobs that you have permission to view.
- **Reports Configurations:** Allows you to set your preferences in the Report - Designer. This tile is available only if you have the relevant permission.
- **Document List:** Allows you to browse through folders and files. See [“Document List” on page 8](#).
- **Search:** Lists all saved searches. See [“Saved Searches” on page 10](#).

Common tile elements


Search

Point to the **My Reports** tile and click the **Search** button  to find the reports that you created.

Maximize

Click the **Maximize** button  on the required tile to maximize the tile. Additional functions might be available for tiles when they are maximized.

More actions button (in minimized tiles)

Point to the reports on the **My Reports** tile, click the **More Actions** button , and click the required actions to edit, run, rebind, modify, or create a new job for reports.



Note: The actions available for minimized tiles are limited. Maximize the tile to see the full list of actions.

8.1.2 Common columns on the Reports Landing page

The following lists the common columns that are displayed on the **Reports** list page:

Name

User-defined name of the report.

Title

User-defined title of the report.

Status

Status of the report.

Modify Date


Date when the report was last modified.


Modifier

Name of the user who last modified the report.

8.1.3 Reports content actions

Reports content actions are the actions you can perform on reports based on your role. You can perform these actions on multiple reports at once by selecting the check boxes next to the reports and clicking the action on the **Action Bar**. Some selections on the **Inline Action Bar**, which appears when you point to a report, are

available by clicking the **More Actions** button . See [“Basic actions” on page 14](#).

The **New** status  icon shows the status of the reports that have not been designed yet. See [“Design a report” on page 119](#).

Actions you can perform on a report:

- **Design:** Design a new report.
- **Edit:** Edit an existing report.
- **Run:** Run an existing report.



Note: You can now view the report in the Smart View context for **Run** action if the **Preview Inline** option in client configuration is enabled. For more information, see *OpenText Documentum Content Management - Reports Installation Guide (EDCREP-ISD)*.

- **Rebind:** Update the DQL query of an existing report.
- **Modify:** Redesign an existing report from scratch using the update DQL statement.
- **New Job:** Create a report job for the report.



Note: You can perform only those actions that are relevant to your role.

For details about the actions you can perform on reports, see the following sections:

- [“Design a report” on page 119](#)
- [“Create a dashboard” on page 121](#)
- [“Edit a report” on page 122](#)
- [“Run a report” on page 123](#)
- [“Rebind a report or dashboard” on page 122](#)
- [“Reformat a report” on page 123](#)


8.2 Create reports

You can create reports if you are a Reports Admin with the designer role access.

1. Click the **All Reports** or **My Reports** tile on the **Reports** Landing page.
2. Click the **Create New Report** icon **+**.
3. In the **Edit type** dialog box, select one of the following categories from the **Category list**:
 - **Create New DCTM Report** to create a new report. See [“Create a report” on page 117](#).
 - **Create New DCTM Report From Template** to create a report based on a preconfigured template. See [“Create a report using a template” on page 118](#).

8.2.1 Create a report

1. Select the report type from the **DCTM-Reports Object Type Dictionary** and then click **Continue**.
2. In the **Edit Properties** dialog box, enter the name of the report in the **Name** box and a title in the **Title** box.
3. Select the required **Permissions**.
 - **Public:** Other users have only the read permission on the report.
 - **Private:** Only you have the permission to view, edit, or delete the report.
 - **Custom:** To apply custom permissions to the report, select **Custom** and then select the **ACL Name** from the list.

4. Select a **Logo** from the list to use in the report.
5. Select one of the following report types from the **Report Type** list:
 - **DQL Query**: Enter a DQL statement for the report.
 **Note:** If you create a report from a template, the DQL Query is updated based on the selected template. Change the DQL query if required.
 - **Saved Search**: Select a specific **Saved Search** from the list.
 - **External DataSource**.
 - **External Database**: Select **Connection Names** from the list and type the **Query** in the box.
6. Click **Create and Design** to design the report. The **Report - Designer** window opens. See “**Design a report**” on page 119. Alternatively, you can click **Create** to save the object to the reports list and later select the report from the list and design it.

8.2.2 Create a report using a template

1. Select the report type from the **DCTM-Reports Object Type Dictionary** and then click **Continue**.
2. In the **Edit Properties** dialog box, type the name of the report in the **Name** box and a title in the **Title** box.
3. Select the required **Permissions**.
 - **Public**: Other users have only the read permission on the report.
 - **Private**: Only you have the permission to view, edit, or delete the report.
 - **Custom**: To apply custom permissions to the report, select **Custom** and then select the **ACL Name** from the list.
4. Click **Continue**.
5. Select the template from the **Select template** dialog box in the **Recent** or **Preset** section and click **Create** to create the report.

8.2.3 Design a report

After creating a report, you can design a report if you are a Reports Admin with the designer role access.

Design a report:

1. Click the **All Reports** or **My Reports** tile on the **Reports** Landing page.



Note: If you created a report using an existing template, skip the following steps in this section and follow the instructions to edit, rebind, or modify the report. See [“Configure reports” on page 122](#).

2. Select the report you want to design and click **Design** on the **Action Bar**.
3. In the **Report - Designer** window, select a Data Source from the **Data Source** list in the **New Report** dialog box.



Note: The data source does not display if the DQL statement is invalid.

4. Click **Next** and select the required columns from the **Select Columns** list.
 - If you are running a report with selected attributes on the data source, you can only choose the columns that match the attributes specified in the query. If you want to include additional attributes from the object type, use **Select * from <name of object_type>**.
 - If you want to select all columns, select **Mark All** or select the check box next to the data source. To reset the columns that you have selected, click **Reset** to clear all check boxes.
 - After you select the columns, you can click **Next** to configure the **Column Orders** settings. If you do not want to create a report, click **Cancel**. To go back and choose a different data source, click **Back**.
5. To arrange your columns in a specific order on the report, select the column you want to move and click the **Up** or **Down** arrows to move the column accordingly.





Note: You can click **Finish** to complete the report design. If you skip to set up the rest of the options, the default settings will be taken into consideration. You can also go to the previous page or exit the Report - Designer.

6. After arranging the columns, click **Next**.
7. Perform the following steps on the **Sort** screen to configure the sort order for your data:

- a. Click **Add Sort**.

You can delete the sort by clicking the **X** in the list.

- b. You can sort any columns that you have selected on the **Select Columns** tab. Click the down arrow and select the attribute to sort on. Find the column in the list and select it to add it to the **Sort By** window.
You can sort by ascending order (default) or descending order.
 8. Click **Next** after completing the sort configuration.
 9. Click **Add Filter** to add a filter to the report.
You can remove the filter by clicking **X** in the list.
 10. Select the relevant options in the **Field Is** column to filter by **Value** or **Expression**.
 11. Click the **Data Type** list and select a data type from the available data types.
 12. Click the **Column** list and select the column to filter the data on and click **Next**.
Before filtering the data, you must define the filter condition in the Report - Designer.
 13. Select the column to group on and click **Next**.
-  **Note:** You can group all documents by content type and similar data in ascending order.
14. To use **Totals** expressions in your reports, click the **None** list under the **Function** column and select the required value from the list.
 15. On the **Themes** screen, click **Next** and select the required themes.
 16. Click **Next** and select the **Orientation**, **Unit**, **Language**, and **Component** on the **Layout** screen.
 17. Click **Finish**.
 18. To modify the title of the report, double-click the title field to edit and click **OK**.

 **Note:** To rearrange the display of the report, drag and drop any of the fields and column headers.

8.2.4 Add a logo to a report

You can add a logo to a report if you are a Reports Admin with the designer role access.

1. Click the **Image** icon on the **Insert** menu.
2. Select the location where to place the logo.
3. Draw a rectangle and click the box to open the **Image** dialog box.
4. In the **Image** dialog box, click **Image URL**.

5. Go to **Variables > DCTM-DataSource** and double-click **logoimageurl**. Copy the image URL that is displayed from *logoimageurl* parameter and enter in the image URL field in **Image** dialog box.
6. Click **OK** and select **Properties**.
7. Change the value from **False** to **True**.
8. Click the **Preview** tab to preview the report.
9. On the **Page 1** tab, click **File > Save**.

8.3 Create a dashboard

Dashboards display reports. You can create a dashboard while creating a blank report if you are a Reports Admin with the designer role access. See [“Create reports” on page 117](#).



Note: Dashboards are based on the HTML5 framework.

Create a dashboard:

1. Select the report from the **All Reports** or **My Reports** page and click **Edit** on the **Action Bar**. The **Report - Designer** window opens.
2. Go to **File > New** and click **Blank Dashboard** or any other predefined dashboard templates, and click **OK**.
3. Click **Save** and provide a name for your dashboard, preferably ending with dashboard to distinguish it from other reports. For example, my_dashboard.
4. Add external data sources and other controls such as tables, charts, and indicators to filter and view specific data, if required.

8.4 Add external data sources

You can add an external data source while creating or modifying a report or a dashboard if you are a Reports Admin with the designer role access.

Add an external data source:

1. Click **New Data Source** and select the type of connection from the list of options.
2. Enter a name for the connection and provide the following details in the **Connection String** box:
 - **Server Address**
 - **Database name**
 - **Username**

- **Password**
3. Select the **Test connection** check box next to the **Connection String** box to test and ensure the connection is successful.
 4. Select the data to display from the data source and click **OK**.
 5. Preview the data and click **Finish**.


8.5 Configure reports

You can configure existing reports if you are a Reports Admin with the designer role access.

8.5.1 Edit a report

1. Click the **My Reports** tile on the **Reports** Landing page.
2. Select the required report check box on the **My Reports** page and click **Edit** on the **Action Bar**.
3. To modify any column header in the **Header** section of the report, double-click the field and modify the text and click **OK**.
4. Click the **Preview** tab to preview the report.
5. Edit the report and click **File > Save**.


8.5.2 Edit report properties


1. Click the **My Reports** tile on the **Reports** Landing page.
2. Select the required report check box on the **My Reports** page and click the **Properties** button  on the **Action Bar**.
3. Click **Edit**.
4. Make the required changes to the relevant properties and then click **Save**.

8.5.3 Rebind a report or dashboard

You can add or change the DQL statement of an existing report and update the report using the rebind function instead of creating a new report.

Rebind an existing report to an updated data source/DQL query:

1. Click the **My Reports** tile on the **Reports** Landing page.
2. Select the required report check box on the **My Reports** page and click the **Properties** button  on the **Action Bar**.
3. Click **Edit**.

4. Update the DQL statement in the **DQL Query** field.
5. Click **Save** to save the properties.
6. Click the **Home** button  to view all reports and select the report where you updated the DQL query.
7. Click **Rebind** on the **Action Bar**.
8. In the **Report - Designer** window, go to **Dictionary > Data Sources > DCTM-corp (Name of the Repository)** to view the updated attribute in the query.

8.5.4 Reformat a report

You can use the **Modify** action to reformat an existing report using the same report object.

Modify an existing report:

1. Click the **My Reports** tile and select the report you want to modify on the **My Reports** page.
2. Click **Modify** on the **Action Bar**. The **Report - Designer** displays the **New Report** dialog box.
3. Complete the report configuration using the process described in [“Design a report” on page 119](#).

8.6 Run a report

When you run a report, the report is generated and displayed in the web browser.


Running a report is different from editing or viewing it because the report does not open in the **Report - Designer**. Instead, it is generated and displayed on a separate web page.

To run a report, click the **All Reports** tile on the **Reports** Landing page. Select the report check box on the **All Reports** page and click **Run** on the **Action Bar**.

8.6.1 Configure a report to run as a scheduled job

You can run any existing report as a scheduled job if you have the reports job role access.

1. Click the **My Reports** tile on the **Reports** Landing page.
2. Select the report and click **New Job**.
3. On the **Info** tab, provide the following details:
 - **Name:** This field is automatically populated. However, you can modify it if required.

- **Title:** Provide a title for the job.
 - **Set Job to Inactive:** Turn on to set the job to Inactive.
 - **Deactivate on Failure:** Deactivates the job if a failure occurs.
 - **Run After Update:** Run the job after updating the job properties.
4. On the **SysObject Info** tab, do the following:
- **Report Object type:** Select the **OpenText Documentum CM** object type to save the results when you run the report as a job.
 - **External User(s):** Select the email address to send the report after the job is successfully completed.
 - **Internal User(s):** Select the **OpenText Documentum CM user(s)/group(s)** to send the report notification.
 - **Rendered Reports Attribute Name(s):** Select the attribute name to display when the report is rendered.
 - **Rendered Report Attribute Value(s):** Select the attribute value to display when the report is rendered.
 - **Version:** Select the required version.
 - **Rendered Report Format:** Select the required formats in which to save the report results. It is a mandatory field.
 - **Parameter Name(s):** Enter the parameter name if you have configured a parametric query.
 - **Parameter Value(s):** Enter the parameter value if you have configured a parametric query.
 - **Target Report Folder:** This is a mandatory field.
5. On the **Schedule** tab, do the following:
- **Start Date:** Click the calendar  icon and select a start date to run the job.
 - **Repeat:** Select the frequency to run the job. You can select **Minutes**, **Hours**, **Days**, **Weeks**, **Months**, or **Years**.
 - **Frequency:** Type a value for the repeat parameter.
For example, if the **Repeat** option is set to **Minutes** and **Frequency** is set to **45**, the job will automatically run every 45 minutes.
 - **Schedule Types:** Select the appropriate option to end the job by a particular date or after a certain number of runs.
 - **Maximum # of Times:** Type a value to stop the job execution after the job has run a certain number of times.
6. Click **OK**.

8.7 Configure Reports Configurations preferences

You can set your **Reports Configurations** preferences in the Report - Designer if you are a Reports Admin with the designer role access. In addition, you can create the report using the external database connection.

Set your Reports Configurations preferences:

1. On the **Reports** Landing page, click the **Reports Configurations** tile.
2. Select the required default framework from the **Default Framework** list.
3. Select the required default language from the **Default Language** list.
4. On the **DB Connection Configuration** tab, do the following to add a new connection or modify an existing connection:
 - **Connection Name**
 - **DB Type:** Select any database from the list.
 - Oracle
 - SQL Server
 - MySQL
 - PostgreSQL
 - **DB Host**
 - **DB Port**
 - **DB DataSource/ServiceName (Oracle)**
 - **DB Username**
 - **DB Password**
5. Click **OK**.

8.8 Advanced configurations

This section describes the various advanced configurations such as using DQL queries, creating relations, adding hyperlinks, and so on, that you can perform on reports.

8.8.1 Specify multiple queries

You can specify multiple queries in the DQL query or the **External Database** window by separating them with a semicolon (;) and prefixing them with a label in braces ({}). If you are creating two different queries with the same table name, label them uniquely to distinguish between them.

You can run two queries and provide separate data tables in the data source in the following format:

```
select * from dm_cabinet;  
select * from dm_folder
```

The table names used in the queries are the default names. To edit the existing query, see [“Edit report properties” on page 122](#).

To name the table differently, add a prefix within the braces ({}):

```
{cabinet} select * from dm_cabinet;  
{folder} select * from dm_folder
```

After you open the Report - Designer, each object type is available for selection.

The following configured DQL queries (dm_cabinet and dm_folder) are mapped and displayed in the **New Report** dialog box:

```
dm_cabinet  
dm_folder
```

Either of the data sources can be used in the report. In addition, you can rename the data source by using {}:

```
{Cabinet}select * from dm_cabinet;
```



Note: The name of the data source inside the {} should not have a space.

8.8.2 Format date strings

Create a new variable or edit the date string:

1. Go to **Dictionary > Variables**.
2. Right-click **Variables** and click **New Variable**.
3. In the **New Variable** dialog box, specify **Name**, **Alias**, and the required field values.
4. Select the type of **Init by** field from the list, and provide the date string type. For example {Today.ToString("MM/dd/yyyy")}

By default, the date string will include a time stamp.

Use the following syntax to remove a date string:

```
{...ToString("MM/dd/yyyy")}
```

The expression Today in this example is used to show the current date:

```
{Today.ToString("MM/dd/yyyy")}
```

8.8.3 Add parametric queries

Parametric queries are a specialized syntax that the Reports feature extends for DQL queries when using parameters within the query. Users can be prompted to provide inputs to these parameters when running a report.


The following example is a query with parameters:

```
select r_object_id, object_name, title, r_creator_name, f.r_folder_path FROM dm_document
s, dm_folder f WHERE s.i_folder_id = f.r_object_id AND f.r_folder_path != ' ' AND
r_creator_name = '&username' ENABLE (ROW_BASED)
```

You must first create a report, before you add the Parameterized DQL. See [“Create reports” on page 117](#).

If you have created and designed the report without any DQL parameter, you can edit the report to add a parameter in DQL.

Add a DQL Parameter:

1. Select the **All Reports** tile on the **Reports** Landing page.
2. Select the required report, click the **Properties** icon , and click **Edit**.
3. Add a new condition in the existing DQL as shown in the following example and click **Save**.

For example:

Existing query: Select object_name,owner_name, acl_domain,r_object_type, r_creation_date,r_full_content_size,title from dm_Document where r_object_type = 'tt_report'


Update the query to: Select object_name,owner_name, acl_domain,r_object_type,r_creation_date,r_full_content_size,title from dm_Document where r_object_type = 'tt_report' and owner_name like '%&vari%'



Note: Instead of **like** you can use “=” and remove “%”. For example, owner_name = '&vari' where “&” is mandatory to identify the parameter name. In addition, you can rename **&vari** to **&owner_name** or rename as required.

4. Select the relevant report on the **All Reports** page and click **Rebind** to update the DQL. See, [“Rebind a report or dashboard” on page 122](#).
5. The report is now in Edit mode. Go to **Dictionary > Variables** and create a new variable with the same name of the parameter used in the DQL.
6. Select the **Preview** tab and enter the parameter value.

8.8.4 Add hyperlinks

1. Select the field where you want to apply the hyperlink.
2. Go to **Properties > Behavior > Interaction**.
3. In the **Interaction** dialog box, click the **Common** tab, and then enter the hyperlink in the **Hyperlink** field.
4. Click the  icon and edit the expression:
`http://<hostname>:<port>/D2/servlet/Download?auth=basic&event_name=open&id={dm_document.r_object_id}&_docbase={docbase}`
where:
 - `<hostname>`: Hostname or IP address of the server.
 - `<port>`: Port number of the server.
 - `<{dm_document.r_object_id}>`: Object ID from **Data Sources > DCTM-DataSource**.
 - `<{docbase}>`: OpenText Documentum CM repository.
5. Replace `{dm_document.r_object_id}` with your object ID from **Data Sources > DCTM-DataSource** and `{docbase}` with the repository name.
For example:

```
http://10.xxx.36.xxx:8080/D2/servlet/Download?
auth=basic&event_name=open&id=0900115c8009xxxx&_docbase=testxxx
```
6. Click **OK**.
7. Save and preview the report.
8. Point to the object name and click to open the document. The document is opened, and you will be prompted for authentication.

8.8.5 Create relations

A relation describes the relationship between data sources. For example, the following sample shows that there are two DQL statements for reports:

```
select * from dm_document where a_content_type in (&vari);
select * from dm_format order by name
```

Preview the report to view the name of the **Content Type** field.

If you want to display the full name of the content type, follow these steps to set up a relation between the `dm_document` and `dm_format` data sources:

1. Open the Report - Designer to edit the report.
2. Select the **Dictionary** tab on the right pane.
3. Click the button next to the **Data Sources** node.

4. Click the button next to the **DataSource Type** node and select the appropriate data source node.



Note: There are two data sources for this report:

- **dm_document:** Displays all the attributes that you can use from the *dm_document* object type.
- **dm_format:** Displays all the attributes that you can use from the *dm_format* object type.

The *dm_document* data source consists of the *a_content_type* data column. You can display the full name of *a_content_type* in the report by looking at the *dm_format* data sources description.

Go to **Data Sources > DCTM-projects** and expand the **dm_document** node.

5. Right-click **dm_document** and select **New Relation** on the context menu.
6. Enter a value for the following fields:
 - **Name in Source:** FormatRelation.
 - **Name:** FormatRelation.
 - **Alias:** FormatRelation.
 - **Parent:** Select **dm_format** from the list.
 - **Child:** Select **dm_document** from the list.
 - **Parent Columns:** Select the name attribute value from the **Child** list and move it to the **Parent** list.
 - **Child Columns:** Select **a_content_type** attribute value from the **Parent** list and move it to the **Child** list.
7. Click **OK**.
8. Go to the **Content Type** column in the report.
9. Remove the **dm_document.a_content_type** field from the Databand.
10. Select the **Dictionary** tab and go to the **FormatRelation** node.
11. Select the **Description** field and drag it to the report under the **Content Type** column header.
12. Select the **Description** header and click **Delete**.
13. Expand the data source to match the size of the column.
14. Format the cell with the following settings:
 - **Font:** Arial; 8pt
 - **Vertical Alignment:** Center

- **Text Quality:** Wysiwyg
- **Word Wrap:** True
- **Border:** none
- **Component Style:** none
- **Can Grow:** True
- **Grow to height:** True


15. Select the **Preview** tab to view the changes. The **Description** field is displayed in the report.

8.8.6 Switch expression statements

The Switch shortcut function allows you to change values in the report based on a condition.

The column name is displayed as a number instead of the actual name value. Add a switch statement to update this format.

To update the switch expression statement:

1. Select the required field on the report, then right-click and select the **Design**  icon on the menu.
2. Select the **Expression**.
3. Update the expression statement for column name to the switch expression as follows:

```
{Switch(<table name>.<column name>.equals("<existing value>"), "Delete", <table name>.<column name>.equals("<existing value>"), "Write", <table name>.<column name>.equals("<existing value>"), "Version", <table name>.<column name>.equals("<existing value>"), "Relate")}
```
4. Preview the report.

8.9 Tips

- Use of HTML5 Viewer and Report - Designer is recommended for generating live reports when the report is expected to include a large number of records. It is also recommended to use HTML 5 Viewer and Report - Designer if the report contains nested variables or filters.
- If the report is expected to include 100,000 plus records, it is recommended to schedule a report job to generate the report in the required format. If you request an online report that might contain a large number of records, it might result in very long delays when producing the report or a session time-out. It is recommended to schedule the job to run in the background. Each job saves a report in the repository, which you can view when required.

- Provide the **Name** and **Description** of the report in the report **Properties**. Save the report, the exported report will appear with the provided name.
- If you configure a report that might result in a large record set, for online viewing, it is recommended to create multiple reports using DQL with "enable (return_range <start> <end> <'column name ASC/DESC'>)". If there are 1,000,000 records, create two reports with ranges from 1 to 500,000 and 500,001 to 1,000,000 (without the commas).
- Manage the report time-out in the `ServerTimeout` tag in the `\inetpub\wwwroot\DCTM-ReportsCore\appsettings.json` file.
- To obtain better row results, enter proper settings in the report fields in the **Microsoft Excel - Export Settings** dialog box.

Chapter 9

Mobile

OpenText Documentum CM Mobile (Mobile) is a lightweight mobile application that links directly to a repository, allowing users to browse, access, search, and add content on any iOS or Android device from anywhere.

Mobile also allows users to access a repository from mobile browsers such as Safari (iOS) and Chrome (Android).

9.1 Mobile Landing page and common tiles

The main section of the Mobile Landing page includes several tiles that allow you to quickly access files or tools. The tiles that appear on your Landing page and their names depend on your configuration. If configured, you can access additional Landing pages from the menu. The following are the tiles that can appear on a Landing page:

Recently accessed files

The **Recently accessed files** tile helps you to quickly find documents or items you have recently opened, and provides details about the documents such as when it was last accessed, what user has it checked out, and where it is stored.

Favorites

The **Favorites** tile lists all of the items you have designated as a favorite.

Offline

The **Offline** tile lists all of the content you have downloaded from the repository for viewing when you are not connected to a wireless network.



Note: Offline access is not available in the Mobile app's implementation.

Repository browser

The **Repository** tile allows you to browse through and search the areas of the repository that your administrator has granted access. The name of the repository is generally shown at the top of the tile.

Query form search

Specialized tiles can be added to the Landing page that launch a search configured by administrators with a specified set of input properties. Query form searches display a content property page as a form for user search specification.

Upload file

An **Upload file** tile can be added to the Landing page that allows you to import a file from your mobile device to the repository. Your administrator might also add specialized Upload File tiles that contain preset information about certain

types of content that allow you to skip the requirement to describe your new content. For example, an import tile titled *Maintenance Log Spreadsheets* could be added to the Landing page for your convenience.

You can also access this action from a file list menu.

Scan and upload

A **Scan and upload** tile can be added to the Landing page that allows you to take pictures and upload them as a PDF to the repository. Before saving the pictures as a PDF, you can crop, rotate, re-order, and enhance them. This feature can be useful to scan physical documents and save them digitally in the repository.

You can also access this action from a file list menu.

Barcode scanner

Tap the **Barcode scanner** tile to open your device's camera and scan a barcode. This feature is not available in the Mobile browser application.

QR code scanner

Tap the **QR code scanner** tile to open your device's camera and scan a QR code. This feature is not available in the Mobile browser application.

Saved searches

The **Saved searches** tile allows you to access repository search queries that you or others have saved. The queries are grouped within the tile for easy identification.

URL Link

Your administrator can add **URL Link** tiles to the Landing page that allow you to visit internal or external sites. The sites will open in a new browser tab.

My tasks


The **My tasks** tile contains a list of workflow tasks that other users have assigned to you. The default sort order of the tile is descending order by Sent Date, so the most recent task is at the top of the list. Unread Tasks appear in bold type.

Checked out files


The **Checked out files** tile contains a list of files that you currently have checked out of the repository. From here you can view a list of files that you currently have checked out of the repository and perform actions on the files, either individually or by selecting multiple files. For more information, see [“Mobile content actions” on page 136](#).

My Collections

The **My Collections** tile lists collections of documents, folders, and cabinets that you have assembled for quick access to perform your work. From here, you can view collections, add items to collections, create new collections and more. For more information, see [“Collections” on page 146](#).

From within a tile or repository, tap < to return to the previous screen. Tap  to see more actions that can be performed on items.

9.2 Mobile menu

The Mobile menu includes several links to key pages and features. Tap  to access the menu.

Which links appear on the menu and with what titles depends on your configuration. The following are the links that can appear:

Home

Tap **Home** to return to the main Mobile app's Landing page.

Other landing pages

If you have additional Landing pages configured, tap the name of the other Landing pages to navigate to them. These pages can be configured with a different set of tiles than your default Landing page.

Favorites

Tap **Favorites** to open the **Favorites** tile.

Recently accessed files

Tap **Recently accessed files** to open the **Recently accessed files** tile.

My Tasks

Tap **My tasks** to open the **My tasks** tile.

Offline

Tap **Offline** to open the **Offline** tile.

Profile

Tap **Profile** to open your profile. On this page, you can add or change your profile picture.

Checked out files

Tap **Checked out files** to open the **Checked out files** tile. From here you can view a list of files that you currently have checked out of the repository and perform actions on the files, either individually or by selecting multiple files. For more information, see [“Mobile content actions” on page 136](#).

Settings

Tap **Settings** to open a page of options. From here, you can change various app settings, such as your offline pin and the server address, and enable biometrics.

Sign out

Tap **Sign out** to end your current session.

9.3 Biometric authentication


Fingerprint and face recognition biometric authentication is turned on by default in both iOS and Android devices. Biometrics must first be turned on in your device, and the biometrics available on login depend on your device's support and setup.




Note: Biometric authentication cannot be turned off through the Mobile app. For more information, contact your administrator.

9.4 Mobile content actions

This section describes actions you can perform on folders and content.

An **Inline Action Bar** can be activated by swiping left on the selected content's list row. You can view additional actions in the **Inline Action Bar** by tapping the  button at the end of the bar.

In most cases, these actions can also be performed on multiple items at once, by tapping  above the Doclist, tapping **Select**, then selecting the check boxes beside the items.

View content

Tap content. Content will open in the appropriate viewer.

Edit content



Swipe left on content and tap **Edit**.



The content will be locked and downloaded to your mobile device. If you are using the Mobile app, you will be prompted to select which app to use to open the content. If you are using the Mobile app in a browser, you must navigate to the download folder and open it.

After making the required changes, use **Add version** to upload the new version from your device. If you do not want to upload the new version, tap the **Cancel Checkout** button to discard your changes and unlock the content.

On iOS, a reminder will appear if you leave content locked.

Delete content

Swipe left on content, tap the **More actions** button , and tap **Delete** . To delete multiple items, select the items (touch and hold), tap the **More actions**

button , and tap **Delete** .

Depending on your permissions and configuration, you can delete cabinets, folders, files, virtual documents, and file links. When deleting a file link, you can choose to delete the file link or the original file and all links in all locations. When deleting a file with multiple versions, you can choose to delete the selected version or all the versions.




Note: You cannot delete checked out files or folders that contain checked out files.

View and edit content properties

Swipe left on content or a folder and tap **Properties**.

Scroll through the **Properties** page, or tap the sub-headings at the top of the page to navigate to sections.

Tap the **Edit** button  to edit the content properties. In some cases, you might be required to digitally sign your changes before they can be saved. Tap **e-sign** and follow the prompts.




Note: The rich text editor is supported in view mode only.

Cancel checkout

Swipe left on content and tap **Cancel Checkout** to undo a checkout and unlock the content. You can only undo the checkout of content that you checked out, not content checked out by another user.

Share content


Swipe left on content and tap the **Share** button  to copy links to content into an email.

Multiple links are provided in the email: one link opens the content in a browser and the other links open the content in the Mobile app.

Make available offline or remove from offline

Swipe left on content and tap **Make available offline** to download an offline copy of the content to your device and make it accessible in the Offline tile. Tap **Remove from offline** to remove the content from the offline view.

Add to favorites or remove from favorites

Swipe left on content or a folder and tap the **Add Favorite** button  to add the content to your list of favorites. Tap the button again or **Remove favorite** to remove the content from your list of favorites.

View your favorites in the **Favorites** tile.

Add a new version

Swipe left on content and tap **Add version**.

The current version will be locked by you and you will be able to browse for a new version of the file. Depending on your configuration, one or more dialogs might appear after selecting a file:

- A dialog asking you to describe the version you are adding, including the new version number, and to decide if the new version should be considered the current version.
- A dialog to add your electronic signature.

Create relations

Swipe left on content and tap **Create relation**.

The **Create relation** dialog appears where you can select the kind of relation and which content to apply that relation to.

For more information, see [“Add content relations” on page 145](#).


View and delete relations

Swipe left on content and tap **Relations**.

A list appears of all content related to this content. You can delete relations by selecting them and then tapping **Delete relation**.

Relation Properties

Swipe left on content under the relation list and tap **Relation Properties**.

Scroll through the relation **Properties** page. Tap the **Edit** button  to edit the relation properties. Only some properties can be edited.

View version history

Swipe left on content and tap **Versions**. A list of the previous versions of the content will appear.

Swipe left on different versions to see the list of options for this version of the content. These options are the same as the options described in this table.

Start a workflow

Swipe left on content and either tap a workflow or open the list of workflows to select from. What appears in your action bar depends on your configuration.

For more information on using workflows, see [“Workflows” on page 150](#).

Send content to a lifecycle state

Swipe left on content and either tap a lifecycle state or open the list of lifecycle states to select from. What appears on the **Action Bar** depends on your configuration.

For more information on using lifecycles, see [“Lifecycles” on page 157](#).

9.5 Browse and search for content

Tap the **Repository Browser** tile on the Landing page, then navigate through the repository’s cabinet and folder structure.

Tap the header at the top of a list of content to choose a sort order. For example, you could sort the content alphabetically, in descending order by **Name**.

Tap content in a folder to open and view the content in the native viewer.


To search for content, navigate to the repository, cabinet, or folder level you want to search from, then type a search term in the search field.

Your administrator can add Query Form tiles to the Mobile app's Landing page that allow you to search for specific types of content by completing a form and submitting it.

9.5.1 Facet search

Facet search allows you to narrow-down lists of items to only items with specified facets. For example, on a list of documents, you can refine the list to only include PDF items that were modified in the last week.

Filters are displayed in the first section of the facet pane, and the facets are displayed below.

Depending on your configuration, facet options can appear on content lists or your task list. To open the **Refine** page with facet search options, tap . On the **Refine** page, you can focus lists by selecting one or more facets. After selecting facets, tap **Done** to return to the lists of items.

Some facets are configured with sub-facets, which you can access by tapping > next to the facet. Some sub-facets can even be configured with additional sub-facets. To filter by sub-facets, open the list of sub-facets and select the ones you want to apply. If you select a facet that includes sub-facets, you filter by all of its sub-facets.

All of the facets that you select are listed along the top of the **Refine** page. You can scroll through the list by swiping horizontally along it.

To stop filtering by facets, open the **Refine** page and deselect facets or remove them all by tapping **Clear All**. If you deselect a facet with sub-facets, all sub-facets are deselected. To deselect only some sub-facets, deselect them in the sub-facet list.

9.6 Upload content

An **Upload File** tile can be added to the Landing page that allows you to import a file from your mobile device to the repository. Your administrator might also add specialized **Upload File** tiles that contain preset information about certain types of content that allow you to skip the requirement to describe your new content. For example, a tile titled *Maintenance Log Spreadsheets* could be added to the Landing page for your convenience.



Note: You can upload only files saved on your device or on a removable memory card. Uploading from third-party storage sites is not supported.

Uploading Linked Documents is not supported.


Upload content:

1. On the Landing page, tap the **Upload File** tile or a specialized upload tile for specific content. You can also upload a file from a file list menu. On the **Upload File** screen, do the following:

- a. Select the specific files you want to upload from your device storage or memory card, or tap **Select all**.

The files are assessed to determine if the types are supported and if the file size is allowed for upload. If any file is disallowed, a message indicates the names of those files that will not be uploaded.
 - b. Tap **Continue** to see a list of files ready for upload, or tap **Cancel**.
2. On the **Upload (<x> files)** screen, where <x> represents the number of files that were allowed for upload, the file list shows the file names, file sizes, and file formats. Do the following:
 - a. You might choose to re-order the files in the list of items ready to be uploaded if you want to copy properties from the first file in the list to the following files in the list.
 - b. You can add more files for upload by tapping **Add File**. You can remove files by swiping that item and tapping the bin icon.
 - c. Tap **Continue** to move to either the **Select type** screen or the **Edit properties** screen, depending on your configuration. Tap **Cancel** to return to either the Doclist screen or the home screen.
3. If only one type of upload has been configured, you will see the **Edit properties** screen.

However, you might need to select an upload type on the **Select type** screen. If you need to, select a **Preset** that is appropriate for the type of file you are uploading. Presets allow you to skip the requirement to describe your new content.
4. On the **Edit properties** screen, if necessary, fill in the **Properties** of your new content. Complete any field marked with an asterisk. You also have the following options:
 - a. You can tap **Copy properties to remaining files** to copy the properties from the first file selected for upload to the remaining files in the list waiting to be uploaded.

 **Tip:** Any time you make changes to the files that are queued for upload, you might be able to select **Copy properties**.

If you tap **Copy properties**, you can step through those properties in each of the remaining files by tapping **Upload**. A list icon next to the filename of each file that you view allows you to see a list of the files queued for upload. You can move between the queued files to make changes.
 - b. Tap **Upload**. If you tap **Back**, you will either see the **Select type** screen or the **Upload (<x> files)** screen.



If you tap **Cancel**, you will stop the upload process.
5. On the Doclist screen you will see the files' upload progress.


If you want to cancel any item's upload, tap the **X** button next to that item. In the **Discard file upload?** box, tap either **Discard** to stop that item's upload, or **Cancel** to continue that item's upload.

9.6.1 Scan and upload

A **Scan and Upload** tile can be added to the landing page that allows you to take pictures and upload them as a PDF to the repository. Before saving the pictures as a PDF, you can crop, rotate, re-order, and enhance them. This feature can be useful to scan physical documents and save them digitally in the repository.

Scan and upload on iOS devices:

1. On the landing page, tap the **Scan and upload** tile, or a specialized upload tile for specific content.
You can also scan and upload a file from a file list menu.
2. Take a picture. When taking a picture, you can turn on your camera's flash, apply a filter, or toggle between automatic and manual capture mode.
3. After taking a picture, tap the preview image in the bottom-left to open your picture and customize it:
 - **Crop:** Remove parts of picture that are not important, such as the excess area around a document. A suggested crop box appears by default which you can adjust.
 - **Filters:** Open a list of filter options. These filters allow you to convert the picture to **Gray** or **Black-White**.
 - **Rotate**
 - **Delete**
4. When you are done enhancing your image, tap **Done**. The capture page reappears. If necessary, take additional pictures and enhance them.
5. When you are done taking pictures, tap **Save**. The **Scan document** page appears with a preview of all the pictures you took.
Tap to open a picture to rotate it or delete it from the document. Tap **Apply** to save your changes or **Cancel** to discard them.
6. On the **Scan document** page, modify the document as necessary:
 - Tap  **Add page** to take another picture.
 - Tap the  **Reorder** button to reorder the images as you want them to appear in the final PDF. Tap and hold to move a page to a different place in the document.

- Tap  **Delete page** to delete one or more pages from the document.
7. When you are done taking, enhancing, and ordering your pictures, tap **Next**.
 8. If configured by your administrator, select a preset that is appropriate for the type of file you are uploading. Presets allow you to skip the requirement to describe your new content.
 9. If necessary, fill in the **Properties** of your new content. Complete any field marked with an asterisk.
 10. Tap **Upload**.

Scan and upload on Android devices:


1. On the landing page, tap the **Scan and upload** tile, or a specialized upload tile for specific content.
You can also scan and upload a file from a file list menu.
2. Take a picture or select a document from the gallery. When taking a picture, you can turn on your camera's flash.
3. Enhance your image:
 - **Crop**: Remove parts of picture that are not important, such as the excess area around a document. A suggested crop box appears by default which you can adjust.
 - **Filters**: Open a list of filter options. These filters allow you to convert the picture to **Gray**. You can remove the previous filter by tapping two times on the filter icon.
 - **Rotate**
 - **Delete**
4. When you are done enhancing your image, tap the **Tic** mark. The **Upload** page appears.
5. If necessary, take additional pictures and enhance them. Tap the **Add page** button to add a new page.
6. On the **Upload** page, tap the **Reorder** button to reorder the images as you want them to appear in the final PDF. If you want to delete any pages, you can tap the **Delete** button and then select the pictures to delete.
7. When you are done taking, enhancing, and ordering your pictures, tap **Next**.
8. If configured by your administrator, select a **Preset** that is appropriate for the type of file you are uploading. Presets allow you to skip the requirement to describe your new content.
9. If necessary, fill in the **Properties** of your new content. Complete any field marked with an asterisk.

10. Tap **Upload**.



Note: The pictures you took to create your PDF are stored on your device.

9.7 Work with content offline



If you are not connected to your repository over a mobile network, you can still view and edit content that you marked as offline and downloaded to your device.

Like other Mobile app pages, you can perform actions on files by swiping left on a file, by selecting multiple files, or by tapping the  button at the top of the offline file list. You can perform a limited set of actions on offline files. When connected to the repository, you can perform additional actions. Here are the actions you can perform on offline files:





- **View:** Tap a file to open it.

-  **Edit:** Open and make changes to the offline version of the file. The edit icon  appears under file names to indicate that the file has been edited.

To apply your changes to the repository version, you must reconnect to the repository and upload your changes.

-  **Check for updates (connected to repository):** Check for a newer version of the file on the repository. If a newer version exists, the  icon appears under the file name.

When you open the offline file list when connected to the repository, the Mobile app automatically checks the repository for newer versions of all your offline files.

-  **Update offline content (connected to repository):** Downloads the latest copy of the file from the repository to your device.
-  **Go to location (connected to repository):** Open the repository location of the file.
-  **Remove** or  **Remove all:** Remove one or more files from your device. If you have made changes to a file, a prompt warns you that removing the file will discard your changes. If you are connected to the repository, you can choose to upload your changes to the repository.

View an offline file:


1. In your offline state, open the Mobile app.
2. Enter the offline PIN you set up previously.

The offline document list opens.

3. If necessary, type a search term to perform a quick search for content.
4. Tap on a file to open it.

Edit an offline file:

1. From the offline file list, swipe left on a file and tap **Edit**.
2. If necessary, select an app on your device to edit the file.
3. Make the required changes and save the file.

When you have updated an offline file, the  icon appears under the file name.

Modified offline files are only stored on your device. To update the repository version of the file, you must upload your changes.

Upload offline changes to the repository:

1. Ensure you are connected to your repository.
2. From the offline file list, swipe left on a file and tap **Go to location**.
3. Tap the repository version of the offline file.
You are prompted to upload your changes to the repository version.
4. Confirm that you want to upload a new version.
5. Provide any required information and submit the changes.

Remove an offline file from your device:

- From the offline file list, swipe left on a file and tap **Remove**.
 - If you did not make any changes to the file, the file is removed from your device.
 - If you made changes to the file, you are prompted to upload the file to the repository as a new version or to discard your changes.

9.8 Scan a barcode or QR code

The Mobile application allows you to use your device's camera to scan a barcode or a QR code, which can be used to retrieve a document from the repository. For example, if you are working in a warehouse and scan a product barcode, the application can display a product information sheet.



Notes


- Scanning functionality is not supported in the Mobile browser application.
- This feature requires you to grant access to your device's camera.
- Contact your administrator for more information about barcode compatibility.

Scan a barcode or QR code:

1. From the Landing Page, tap the appropriate code scanning tile, such as **Barcode scanner**, **XML QR code scanner**, or **JSON QR code scanner**. The exact tile name depends on your configuration.

Your device camera opens.

2. Position your camera so that the full target code is within the camera focus box, and is clearly visible. The Mobile application attempts to scan the barcode for 30 seconds. An error message appears if the application fails to read the code, or if the code does not correspond to content in the repository.

Tap the flash icon  to turn on your mobile device's flashlight. Tap again to turn off.

3. If content can be retrieved from the repository based on the code scan, the application displays a page that summarizes the content, allows you to view the content's version history, and to go to the location in the repository where the file is located.

9.9 Add content relations


Create a relation between content:

1. Swipe-left on a file and tap **Create relation**.
2. Select the kind of relation to create.

After selecting a relation type, you can change it by tapping the relation menu in the **Create relation** dialog.

3. Tap **Add files** and then select where to look for content.
4. Select the files to create a relation with and tap **Add**.

Depending on the relation you select, you can either select one or multiple files.

5. Depending on your configuration, you might be prompted to enter additional information about the relation. If so, tap **Continue** and enter the required information. If you selected multiple files, the following additional options are available:
 - Tap the file list button  to navigate between the files that you selected.
 - Tap **Copy properties to remaining files** to copy the details you entered about the relation for one file to all other files.
6. Tap **Create**.

Reverse the relation:

After selecting files to create a relation to, you can tap the **Reverse relation** button at the bottom of the screen to reverse the relation. For example, instead of creating the relation of Document A *provides info to* Documents B, C, and D, you can create the relation of Documents B, C, and D, *provide info to* Document A.

9.10 Collections

Collections are assemblies of documents, folders, and cabinets you can create for quick access to perform your work.


Tapping the **My Collections** tile on the Landing page opens the **My Collections** list screen. The names of the tile and list screen might be different in your environment depending on your configuration.

Perform actions on collections

You can perform the following actions on collections.

View collections and collection items


- To view collections on the **My Collections** list screen, tap the **My Collections** tile on the Landing page.

The **My collections** tab displays the collections you have created. If you have shared a collection in the list, a **Share** icon  appears next to the name.

- To view collections that are shared with you, tap the **Shared collections** tab.
- To view items in a collection, tap the collection name.

You can view items in both collections you have created and collections that are shared with you.

Create a collection

1. On the **My Collections** list screen, on the **My collections** tab, tap the **Add** button  next to **My Collections**.


2. On the **Create collection** screen, enter a **Collection Name** and tap either of the following:
 - **Create and add item:** To create the collection and add one or more items to the collection at the same time.
 - **Create collection:** To create the collection. You can add items later.

The newly created collection appears on the **My Collections** list screen, on the **My collections** tab.



Tip: If no collections exist yet, tap **Create collection** on the **My collections** list screen and follow the instructions above.

Add items to a collection

1. On the **My Collections** list screen, on the **My collections** tab, swipe left on the collection to which you want to add the items.
2. Tap the **More actions** button  and tap **Add items**.
3. Select the items you want to add (touch and hold) and tap **Add** at the bottom of the screen.




Tip: To add items from within a collection, tap the **More actions** button  and tap **Add item**.



Note: You cannot add items to a collection that is shared with you.


Copy items from one collection to another

1. Select the collection items you want to copy (touch and hold).
2. Tap the **More actions** button  and tap **Add to collection**.
3. On the **Add to collection** screen, tap the **Select** list, select the collection to which you want to copy the items, and then tap **Add to collection**.



Tip: To copy the items to a new collection, select **Add new**.




Tip: To copy a single collection item, swipe left on the item, tap the **More actions** button , and then tap **Add to collection**.




Note: You cannot copy items in a collection that is shared with you.

Move items to another collection

1. Select the collection items you want to move (touch and hold).

2. Tap the **More actions** button  and tap **Move to collection**.
3. In the **Move to collection** screen, tap the **Select** list, select the collection to which you want to move the items, and then tap **Move**.




Tip: To move a single collection item, swipe left on the item, tap the **More actions** button , and then tap **Move to collection**.




Note: You cannot move items in a collection that is shared with you.

Remove items from a collection

1. Select the collection items you want to remove from the collection (touch and hold).
2. Tap the **Remove** button .
3. When prompted for confirmation, tap **Remove**.




Tip: To remove a single collection item, swipe left on the item, tap the **More actions** button , and then tap **Remove**.




Note: You cannot remove items from a collection that is shared with you.

Rename a collection

1. On the **My Collections** list screen, on the **My collections** tab, swipe left on the collection you want to rename.
2. Tap the **More actions** button  and tap **Rename**.
3. On the **Rename collection** screen, replace **Collection Name** with a new name and tap **Rename**.






Tip: To rename a collection from within the collection, tap the **More actions** button  and tap **Rename**.



Note: You cannot rename a collection that is shared with you.


Delete a collection



1. On the **My Collections** list screen, on the **My collections** tab, swipe left on the collection you want to delete.
2. Tap the **More actions** button  and tap **Delete**.
3. When prompted for confirmation, tap **Delete**.

 **Tip:** To delete a collection from within the collection, tap the **More actions** button  and tap **Delete**.

 **Note:** Administrators can also delete collections that are shared with them.


Share a collection

1. On the **My Collections** list screen, on the **My collections** tab, swipe left on the collection you want to share.
2. Tap the **More actions** button  and tap **Share collection**.
3. Tap the **Users/Groups** list, select the users or groups you want to share the collection with, and then tap **Update**.

 **Tip:** To share a collection from within the collection, tap the **More actions** button  and tap **Share collection**.

 **Note:** You cannot share a collection that is shared with you.

Manage a shared collection


1. On the **My Collections** list screen, on the **My collections** tab, swipe left on the collection you want to manage.
2. Tap the **More actions** button  and tap **Manage Share**.
3. On the **Share collection** screen, add or remove users or groups as needed.



 **Tip:** To stop sharing the collection entirely, turn the **Unshare Collection** toggle on.

4. Tap **Update**.

 **Tip:** To manage a shared collection from within the collection, tap the **More actions** button and tap **Manage Share**.

Share collection items


1. Select the collection items you want to share (touch and hold).
2. Tap the **Share** button .
An email is created with the items attached.
3. Complete and send the email.

 **Tip:** To share a single collection item, swipe left on the item and tap the **Share** button .



Note: You cannot share collection items in a collection that is shared with you.


Add a collection item to favorites

- Swipe left on the collection item and tap the **Favorites** button .



Note: You cannot add a collection item to favorites in a collection that is shared with you.


View a collection item's properties

1. Swipe left on the collection item.
2. Tap the **More actions** button  and tap **Properties**.



Note: You cannot view the properties of a collection item in a collection that is shared with you.

View a collection item's relations

1. Swipe left on the collection item.
2. Tap the **More actions** button  and tap **Relations**.






Note: You cannot view the relations of a collection item in a collection that is shared with you.

9.11 Workflows



Note: Some workflows might restrict which documents you can add to them. If you try to add a file to a workflow that is not allowed, a message appears to tell you why it is not allowed.

Send content to a workflow:

1. Select the file or files to send to a workflow:
 - To send one file, swipe left on the file, tap , and then select a workflow.
 - To send multiple files, tap , tap **Select**, and then select the files you want to send to a workflow. Then, tap  and select a workflow.

Mobile evaluates the documents to ensure they are permitted to enter the workflow. A message appears listing the items that are incompatible and will be excluded. The documents that are accepted become the workflow's working files.

2. Complete each page as presented. Required fields are marked with an asterisk. Your input can include general notes, performers or members of your organization who will take part in processing the tasks in the workflow, documents, process variables, and the schedule for the workflow. Here is some information about possible pages you might see:
 - The **Documents** page allows you to view, add, and change the files associated with the workflow. Associated files are divided into two lists, **Working files** and **Supporting files**. When viewing either list, tap **+** to add a file to a workflow and **X** to remove a file.
 - The **Working files** page lists the file or files you used to start the workflow. Depending on how the workflow is configured, you might be able to add additional working files freely, or only add working files to defined placeholders. When placeholders are defined, you can only add files that are compatible with the workflow. Mandatory working files are marked with an asterisk and you must add a file to the placeholder before you can initiate the workflow.
 - The **Supporting files** page lists additional files that can be included in the workflow, but are not required. You can add supporting files freely without placeholders.
 - **Process Variables** allows you to enter data or information that is processed and updated throughout the workflow.

! Important

If you change a working file in the **Documents** panel, process variables do not get updated. Cancel the workflow and start again with the correct content.

9.12 Tasks

Tasks are workflow assignments that can be directed to individual users for resolution. Once a workflow starts, the tasks are sent to the designated users. Content passes through the workflow as users acquire, accept, reject, and delegate tasks. Users and administrators can designate specific users to perform specific tasks.



Note: Your administrator can configure the system to automatically accept tasks on your behalf, and might restrict other actions you can perform on the task.

9.12.1 Navigate tasks

Tap the **My tasks** (or custom equivalent tile name) tile on the Landing page to see your assigned tasks, which are sorted in descending order by Sent Date by default so the most recent task is on the top of the list. Unread tasks appear in bold type.

The task state is represented by the following task icons:



Task not acquired.



Task acquired.




Task rejected.




Task delegated.

Actions you can perform when navigating tasks


- Tap the current sort indicator (by default **Sent**) to change the sort order of the **Task List**. This sorting preference is retained.
- Swipe down on the **Task List** to refresh the list.
- Tap a task in the list to open the **Task Information** view.
- Swipe left on a task in the list and tap  to access actions for the task, such as **Acquire**, **Accept**, and **Reject** (or equivalent custom actions).

9.12.2 Work with tasks



Tap a task in the **Tasks** list to open the **Task Information** view, where you can perform actions on a task, view its properties, refer to notes, and examine process variables, working files, and supporting files.

The primary actions you can perform on the task (for example, **Accept**, **Reject**, or similar actions configured by your administrator) are available by tapping  at the top of the screen.

At the bottom of the screen, you will find the following files and notes:

- Tap **Process variables** to view the process variables form.
- Tap **Working files** or **Supporting files** to view the files that are involved in the processing of this task. Tap a document to open it in the viewer. Swipe right on a document in the list and tap  to perform actions on the document, such as

Properties, **Mark offline** (in the Mobile app only, to download the document to your device for viewing outside of wireless coverage), or **Relations**, which will show you a list of all the files that are related to the document (if applicable).

- Tap **Supporting files** to view a list of documents that have been associated with this task for background or support purposes. Swipe left on a document in the list and tap  to perform actions on the document.
- Tap the **Notes** tab to read or add any miscellaneous notes related to the task. Tap  at the top of the screen to **Add notes**.

9.12.3 Task actions


The following actions can be performed on tasks. Depending on your configuration, some of these selections might not be available.




Note: Primary actions such as **Accept**, **Reject**, or **Delegate** can be custom-labelled by your administrator. For example, instead of **Accept**, you might see **Approved without comments**.

Perform actions on tasks

Acquire a task (confirm that the task has been read and received.)


Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Acquire** (or equivalent custom action).


In the **Task information** view, tap , then tap **Acquire** (or equivalent custom action) button.



Note: Depending on the configuration of the workflow, a task might be acquired immediately when you view the details of the task.


Accept a task (confirm that the task has been completed and quality of response is acceptable and can move forward in the workflow)

Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Accept** (or equivalent custom action).

In the **Task information** view, tap , then tap **Accept** (or equivalent custom action) button.

Depending on your configuration, the task will be accepted and closed immediately, or the system might initiate an acceptance process that could require you to update properties, provide an electronic signature, add signers, or complete associated tasks.


Pause a task or resume a task


Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Pause task** or **Resume task** (or equivalent custom actions).

When a task is paused it is temporarily stopped and will not proceed until it is resumed.

Only tasks without an owner can be paused. When tasks are paused, they no longer appear in lists of active tasks, such as a workflow manager's inbox.


Reject a task (confirm that the task is completed or its quality was not acceptable and must move back in the workflow)


Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Reject** (or equivalent custom action).

In the **Task information** view, tap , then tap **Reject** (or equivalent custom action) button.

Depending on your configuration, the task will be accepted and closed immediately, or the system might initiate an acceptance process that could require you to update properties, provide an electronic signature, or complete associated tasks.

Delegate a task (send the task to a specified user for acquisition, acceptance, or rejection)

Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Delegate** (or equivalent custom action).

In the **Task information** view, tap , then tap **Delegate** (or equivalent custom action) button.

Depending on your configuration, you can also add a note. The note appears as part of the task notes.


View the properties of working files and supporting files

In the **Task information** view, scroll to the bottom of the screen and tap **Supporting files** or **Working files**, then swipe left on a file in the list and tap **Properties**.

Access related files

Working and supported files can feature related files. In the **Task information** view, scroll to the bottom of the screen and tap **Supporting files** or **Working files**, then swipe left on a file in the list and tap **Relations**.

Add supporting files


Tap the **My Tasks** tile, swipe left on a task in the list and tap . Tap **Managing supporting files** and then:

- If there are no supporting files added already, tap **Add files**.


- If supported files have already been added, tap + in the top-right of the page.


In a typical case, a user adds a supporting file from one of the working files' related files. To do this, swipe left on a working file, tap **Relations**, then swipe left on a related file and select **Add as supporting File**.

To select multiple related files to add, long-press each file until a check mark appears beside the file.


To remove a supporting file, swipe left on a file in the **Supporting Files** list, tap , and then tap **Remove supporting file**. To select multiple related files to remove, long-press each file until a check mark appears beside the file.


Add a note to a task

Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Add note**.

In the **Notes** view, tap , then tap **Add Note**.


Change task priority


Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Change task priority**.

In the **Task information** view, tap , then tap **Change task priority**.


Select a priority from the list: **Highest**, **High**, **Normal**, **Low**, or **Lowest**.



Toggle read or unread status of a task

Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Mark as Read** or **Mark as Unread**.


In the **Task information** view, tap , then tap **Mark as Read** or **Mark as Unread**.

Review a list of task performers and update performers

Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Task performers**.

 **Note:** Depending on your permission levels, you can update the list of performers by tapping . Select the performers, then tap **Update** to update the list.

Abort a workflow

Tap the **My Tasks** tile, swipe left on a task in the list and tap , then tap **Abort workflow**.

In the **Task information** view, tap , then tap **Abort workflow**.

This action closes the workflow. Administrators and the supervisor of a workflow can perform this task.

Access a task's process variables

Tap the **My Tasks** tile, swipe left on a task in the list.

In the **Task information** view, tap **Process variables**.

9.12.4 Tasks with digital signatures

If the Mobile app is configured with a digital signature provider, accepting a task might require you to send a signature request. Here are some details about digital signature tasks:

Choosing signers

- You can send users a request to digitally sign a document. Depending on your configuration, you can also send the document to someone without an account by entering their email address. This allows you to send signature requests to people inside your organization who do not use OpenText Documentum CM and even people outside of your organization.
- Depending on your configuration, you can send documents in their native format, as well as PDF Configuration Print and Export formats.
- Depending on your configuration, when adding signers to a digital signature task, you can define the signing order to create groups of signers. Each member of a group must sign the document before the next group receives the digital signature request.
- When you have multiple groups of signers, tap and hold on a signer to drag them to another group.

! Important

If the digital signature provider is Docusign, after the envelope is created on the Docusign portal, do not change the recipient's email or type, or the **Needs to Sign** option. You can add more recipients in the Docusign portal, but you cannot change the recipients selected in Smart View.

Included documents

- When you complete a digital signature workflow task, the workflow's working file is sent for signature. Depending on the digital signature provided, if a task has more than one working file, only the first file might be sent.
- When a document is sent for digital signature, it is locked until all signing tasks are complete.
- Workflow supporting files are included with the signature request, but do not need to be signed. The signer can review these files when reviewing the signature request. If there are multiple supporting files, you are prompted to select which files to include in the digital signature request when completing the task.

Remove documents from the digital signature request by swiping left on the document and tapping **Remove**. You can also select multiple documents and then click **Remove**.

After documents are signed

- After all signers have completed their tasks, the document is re-added. Your configuration determines if it is added as a major or minor version, or if it is added as the same version.
- A signing log is created. Where it is saved and if you can access it are configured by your administrator.

9.13 Lifecycles

A *lifecycle* is a sequence of states that you can move content through. They are used to:

- Indicate the status of the content as it passes from one business protocol to another.
- Apply and change content retention and markup policies.

Lifecycle states are promoted (or demoted) in sequential order using a set of conditions and following states. Your administrator can configure promotion to display a prompt that requests electronic signatures or properties updates. The lifecycle does not progress until these prompts are completed.

The following table describes an example lifecycle:

State	Entry condition	Next state
Draft	None	Reviewed
Reviewed	Content is in Draft state	Draft Approved: requests electronic signature
Approved	Content is in Reviewed state Content is a PDF	None

In this example:

- Content can be promoted from Draft to Reviewed to Approved. Content can be promoted by repeatedly going to Draft after Reviewed.
- If you promote a PDF from Reviewed to Approved, the system confirms the entry conditions have been met. If this promotion requests an electronic signature, a prompt appears. When you electronically sign the approval, the system promotes the state to Approved.
- If you try to promote a spreadsheet instead of a PDF, the system rejects the promotion request because one of the entry conditions was not met.

Administrators can configure lifecycle batches, which automatically change content properties based on configured frequency and trigger state.




Notes

- Depending on how the lifecycle was configured, you might also need to complete an electronic signature when progressing from one state to another.
- Some lifecycles might restrict which documents you can add to them. If you try to add a file to a lifecycle that is not allowed, a message appears to tell you why it is not allowed.

9.13.1 Send content to a lifecycle state

Send a single document to a workflow:

1. Swipe left on the content.
2. Tap .
3. Select a lifecycle, or open the list of lifecycles and select one.
 - The system evaluates the document to ensure it is permitted to enter the state. If your document is not eligible, a message appears listing the incompatibilities.
 - If configured by your administrator, you might need to provide an electronic signature, or make a properties update when you change the state.



Note: In some cases, your administrator might permit you to override the usual progression of the lifecycle states through direct state transitions. For example, if the state progression of your lifecycle usually follows Draft, Reviewed, Released, Archived, you might have a menu item labelled **Move to Archived** that allows you to force a state change from Draft to Archived. The states in the process that you skip are not evaluated. Only the conditions for the target state are considered.