OpenText™ Documentum™ Content Management for Salesforce®

User Guide

This user guide describes how to work with OpenText Documentum CM for Salesforce in different user interfaces and environments.

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OpenText™ Documentum™ Content Management for Salesforce®
User Guide
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This documentation has been created for OpenText™ Documentum™ Content Management for Salesforce® CE 25.4.
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Open Text Corporation

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

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

Table of Contents

Chapter 1

What is OpenText Documentum CM for Salesforce?

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

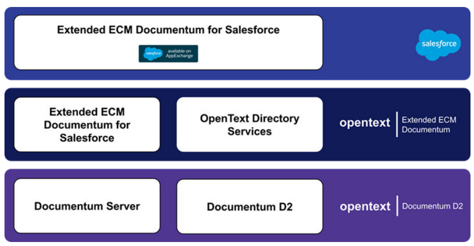

Figure 1-1: Solution components

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

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

Business workspaces

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

Business relationships

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

1.1 Related documentation

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

Chapter 2

Working in OpenText Documentum CM Smart View

The chapter describes mainly functionality that is added by OpenText Documentum CM for Salesforce.

2.1 Working in the Document tile

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.

2.1.1 Content actions

This section describes the actions you can perform on folders and content. In most cases, these actions can be performed on multiple items at once by selecting the check boxes beside the items and clicking the action on the **Action Bar** above the item list. Some actions on the **Inline Action Bar**, which appears if you point to content, are available by clicking the **More actions** button at the end of the bar.

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 can 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 your desired section.

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.

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.

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 and 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 20.

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 *OpenText Documentum Content Management - Smart View User Guide (EDCCL-UGD)*.

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 20 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 20 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 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 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 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 20 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**.

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)**.

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**.

2.1.2 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.

2.1.3 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.

2.1.4 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.

2.1.5 Create new content

You can create new content in Smart View if your administrator has granted you permission and has established certain content templates.

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.

2.1.6 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 18 or “Upload content” on page 17.

   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.

2.1.7 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.

2.1.7.1 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 21.

2.1.7.2 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 16.

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.

2.2 Managing a Salesforce reference of a Business Object

Your content is connected to Salesforce on Business Object level. Here, a reference controls where the content is used in Salesforce.

To add a reference to a Business Object:

1. Select a business workspace.
2. In the menu of the business workspace, click **Manage Business Object**.
3. Optional If you cannot see the reference on the screen, search for the document based on the available fields.
4. Click the **Search** button in the **Reference** section. Search and add the business object.
   Metadata of the business workspace is displayed.
5. Close the window.

To replace or remove a reference to a Business Object:

1. Select a business workspace which already has a reference.
2. In the menu of the business workspace, click **Manage Business Object**.
3. To remove a reference, click the **Remove** button.
4. To replace a reference, click the **Replace** button.
   a. Optional If you cannot see the reference on the screen, search for the document based on the available fields.
   b. Search and add the business object.
      Metadata of the business workspace is displayed.
   c. Close the window.

2.3 Opening OpenText Content Management from OpenText Documentum CM

To open the OpenText Content Management interface from OpenText Documentum CM, you need to add a link within a tile. The link can be integrated into a Landing page widget or into the context menu of a business workspace.

To add a tile with a link to OpenText Content Management page on the OpenText Documentum CM Landing page:

For more information, about how to create and add widgets, see Section 13.22 "Configuring an Internal Widget" in *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)*.

1. Create a new widget with the following settings:

   Name
   Your internal name.

   Label
   The label that is visible to the user.

   Application
   Your application that shows the landing page.

   Widget Type
   OpenURLWidget

   URL
   The URL of you OpenText Content Management system.

2. Add the widget to your landing page.

   For more information, see *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)* and *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)*.

3. Click the link on the tile to open OpenText Content Management.

2.4 Opening Workspace View from OpenText Documentum CM

You can access the Workspace View from OpenText Documentum CM by directly switching to OpenText Content Management.

To switch to OpenText Content Management:

1. Navigate to the business workspace.
2. In the menu of the business workspace, click **Open OpenText Content Management**.
   The Workspace View of OpenText Content Management opens.

2.5 Creating business workspaces in OpenText Documentum CM

If you have documents that should be saved in a workspace in OpenText Documentum CM without yet being linked to a Salesforce object, you can start the business workspace creation in OpenText Documentum CM.

The business workspace is created in OpenText Content Management, using the template and all other features that are defined here. Thus, this workspace can easily be connected with Salesforce later. The name of the business workspace depends on the individual settings of your system. For example, Purchase order, Resume or whatever is relevant in the context of your OpenText Documentum CM folder.

To start workspace creation in OpenText Documentum CM:

1. Open the folder where you want to create the business workspace.
2. Click + > <*business workspace*>.

   The real name that displays in the menu is not <*business workspace*>, but the individual configuration for your folder and system.

   The entry opens a template for business workspace creation.
3. If the name of your workspace is automatically created, you need not fill data in the template.

   If you manually create the name, enter the name.

   Note: Further information or data is not saved for your business workspace.
4. Click **Save**.
   The business workspace is not connected to a Business Object in Salesforce. The Salesforce attributes are empty.

Chapter 3

Working in Salesforce

3.1 Creating a business workspace

You can create business workspaces for all business objects for which this feature is configured, for example account.

To create a business workspace:

1. Find the account and open the **Details** view.
2. Click the **Workspace** button.

   If your system is configured accordingly, the new business workspace is created in your repository and displayed in Salesforce. It depends on the configuration how it is displayed.

3.2 Working with the business workspace

You can use the standard functionality of your repository to handle your business workspace. For example you have the following options:

- Add, move, and delete documents
- Search for folders and document

For more information, see the OpenText Documentum CM online help.

It depends on your Salesforce configuration how the business workspace is displayed.

3.2.1 Working with a business workspace in Lightning

If your Salesforce system is configured for Lightning, you have two additional tabs on the Lightning page:

- The **Documents** tab shows the workspace content.
- The **Workspace** tab shows the workspace in the Smart View with access to additional tiles and tabs.

3.2.1.1 Working with a business workspace in Documents

You see the contents of the business workspace and have the following options:

Filter
Open the filter side bar. Select the filter.

Add a folder or document
Add a folder or a document to the business workspace. Alternatively, you can drag and drop files from your file system to the list.

Favorite
Mark the business workspace as favorite or remove the mark. Favorite business workspaces are listed in the Favorites tile.

Navigate back
Click the link to navigate back to the previous location.

If enabled, this navigation option is used in a business workspace instead of the breadcrumb trail to go back to the previous location from where you entered the current workspace. The link is only available when the previous location is not the **Home** page.
If the previous location is a workspace or a sub-folder of a workspace, then only the workspace name is displayed as text in the link. To navigate within a workspace, use **Navigate up** or the **Navigation tree**.

Navigation tree
In a business workspace, click to open a panel with a navigation tree of the whole business workspace.

As long as you continue to use the same browser session, your selection to open or close the navigation tree will persist until you explicitly change it.

Navigate up
In a business workspace, click to navigate one level up. Click and hold to open a menu with all higher levels. This icon is an alternative to the **Navigation tree**.

Search for a document or folder
Type some letters that are contained in the name of the folder or document. The list is immediately reduced to entries that contain these letters.

Clear the search
Display all items.

Comment
View and add comments, and reply to other's comments. With sufficient permissions, you can also delete comments.

Display details of the item.

Sort
Sort by a column to quickly find an item.

Display details of the item.

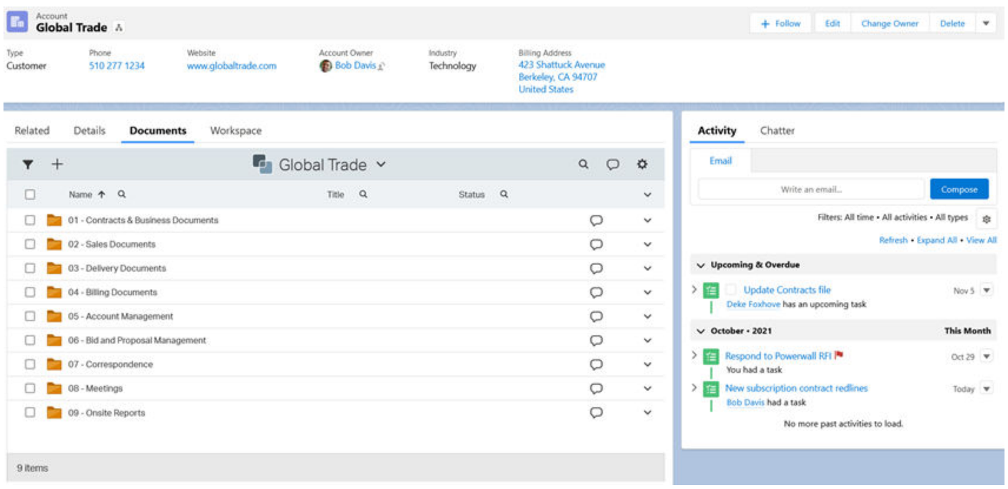

Figure 3-1: Documents in Lightning

3.2.1.2 Working with a workspace perspective in Lightning

On the **Workspace** tab, the workspace perspective displays. It contains different widgets and may have several tabs. Which widgets and tabs are configured depends on how your system is set up. They can also vary between workspace types.

For more information, see the online help. To access the online help, click ?.

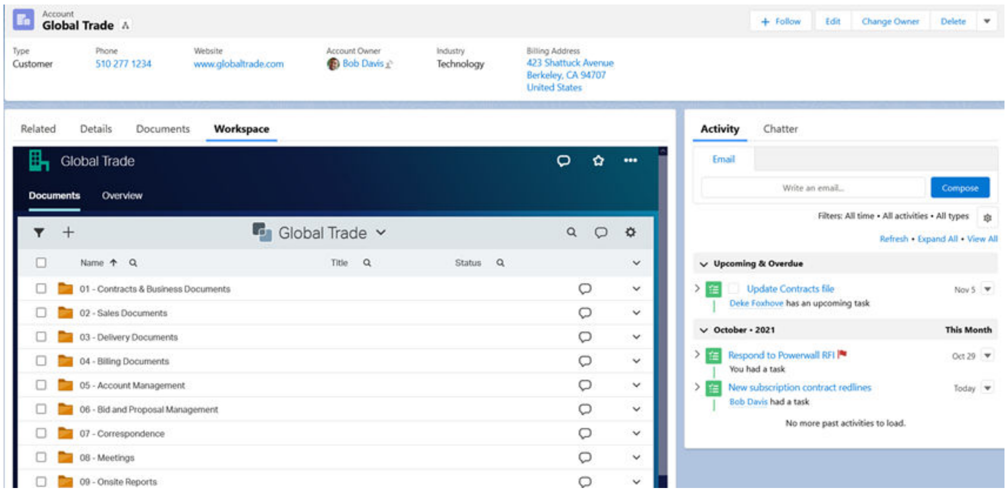

Figure 3-2: Workspace in Lightning

3.2.2 Working with a business workspace in Details view

If your system is configured accordingly, the business workspace displays within the Details view of the business object in Salesforce. You see one of the following:

- Folders and documents in the business workspace
- Workspace perspective in a separate window
- Business workspace in OpenText Documentum CM Smart View.

3.2.2.1 Working with the content of a business workspace in Details view

You see the folders of the business workspace and have the following options:

Filter
Open the filter side bar. Select the filter.

Add a folder or document
Add a folder or a document to the business workspace. Alternatively, you can drag and drop files from your file system to the list.

Favorite
Mark the business workspace as favorite or remove the mark. Favorite business workspaces are listed in the Favorites tile.

Navigate back
Click the link to navigate back to the previous location.

If enabled, this navigation option is used in a business workspace instead of the breadcrumb trail to go back to the previous location from where you entered the

current workspace. The link is only available when the previous location is not the **Home** page.
If the previous location is a workspace or a sub-folder of a workspace, then only the workspace name is displayed as text in the link. To navigate within a workspace, use **Navigate up** or the **Navigation tree**.

Navigation tree
In a business workspace, click to open a panel with a navigation tree of the whole business workspace.

As long as you continue to use the same browser session, your selection to open or close the navigation tree will persist until you explicitly change it.

Navigate up
In a business workspace, click to navigate one level up. Click and hold to open a menu with all higher levels. This icon is an alternative to the **Navigation tree**.

Search for a document or folder
Type some letters that are contained in the name of the folder or document. The list is immediately reduced to entries that contain these letters.

Clear the search
Display all items.

Comment
View and add comments, and reply to other's comments. With sufficient permissions, you can also delete comments.

Display details of the item.

Sort
Sort by a column to quickly find an item.

Display details of the item.

3.2.2.2 Working with a workspace perspective in Details view

If your system is configured accordingly, the workspace perspective displays in a separate window. It contains different widgets and may have several tabs. Which widgets and tabs are configured depends on how your system is set up. They can also vary between workspace types.

For more information, see the online help. To access the online help, click 

3.2.2.3 Working with a business workspace in OpenText Documentum CM Smart View

If your system is configured accordingly, the business workspace displays in a separate window.

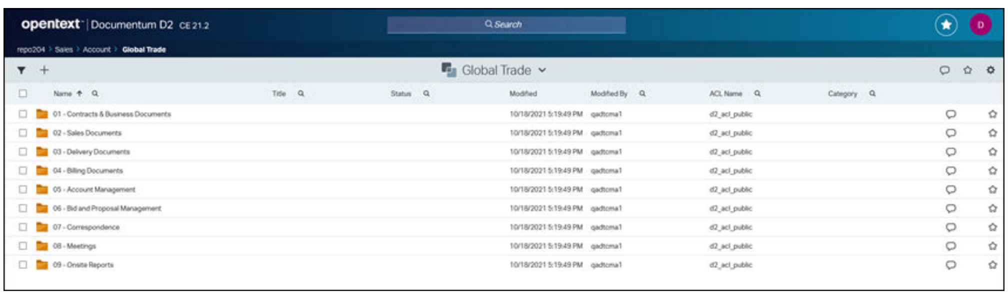

Figure 3-3: Workspace in the Smart View