opentext™

OpenText™ Documentum™ Content Management for Microsoft® 365™

User Guide

Manage the folders and files in the OpenText™ Documentum™ Content Management repository to work with Microsoft® Teams and Microsoft® SharePoint.

EEMSODC250400-UGD-EN-01

OpenText™ Documentum™ Content Management for Microsoft® 365™
User Guide
EEMSODC250400-UGD-EN-01
Rev.: 2025-Oct-13

This documentation has been created for OpenText™ Documentum™ Content Management for Microsoft® 365™ CE 25.4.
It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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Chapter 1

Overview

OpenText Documentum Content Management (CM) for Microsoft 365 is an integration between Microsoft Teams, Microsoft SharePoint, and OpenText Documentum Content Management (CM), that provides seamless access across these platforms. It can be deployed as an app within both Microsoft Teams and Microsoft SharePoint.

This integration enables you to:

- Create or select an existing folder in the OpenText Documentum CM repository for the Microsoft Teams channel.
- Select an existing folder in the OpenText Documentum CM repository for the Microsoft SharePoint.
- Import a file from Microsoft Teams and Microsoft SharePoint to the repository.
- Navigate the repository folder structure.
- Preview the files in Microsoft Teams and in Microsoft SharePoint.
- Edit Microsoft Word, Microsoft Excel, or Microsoft PowerPoint files using Microsoft Teams editor and in Microsoft SharePoint.
- Edit file properties.
- Add files to Favorites.
- Convert to a virtual document.
- Send content to a Lifecycle state.

1.1 Add the OpenText Documentum CM for Microsoft 365 app in Microsoft Teams

After the Microsoft Teams administrator uploads the OpenText Documentum CM for Microsoft 365 app to Microsoft Teams, the app is available in the Microsoft Teams and the Teams owner can add this app to the Microsoft Teams channel.

Prerequisite:

- To add the OpenText Documentum CM for Microsoft 365 app, the Teams channel type must be Standard.

Add the OpenText Documentum CM for Microsoft 365 app in Microsoft Teams:

1. Go to the Microsoft Teams channel.

2. Click the **Add a tab** button +.
3. Search for the `Documentum` app and click the app icon.
4. Specify the repository user credentials.

   Note: By default the app name is `xECM Documentum for M365`. Microsoft Teams administrator can customize the OpenText Documentum CM for Microsoft 365 app name. Contact your Microsoft Teams administrator for the app name.

5. You can create a new folder or select an existing folder.

   Create the folder

   a. Select the **Create a new folder** option.
   b. Click **Map Folder** to map the channel.

      A new folder is created in OpenText Documentum CM and is mapped to the channel. This means the users in this Team will have access to this folder in OpenText Documentum CM, if they are users of OpenText Documentum CM.

   Select an existing folder

   Selecting this option opens the repository to navigate and choose the folder. Click **Map Folder**. Select the folder and click **Continue**.

   Note: Selecting the **Restrict the navigation to this folder** check box limits your navigation to the selected folder and its sub folders in the repository.

6. Click **Save**.

   The app creates the *<Microsoft_Teams_root_path>/<Microsoft_Teams>/<Microsoft_Teams_channel>* mapped folder in the repository.

   where

   - *<Microsoft_Teams_root_path>* is the folder name configured by the Microsoft Teams administrator
   - *<Microsoft_Teams>* is the Microsoft Teams name
   - *<Microsoft_Teams_channel>* is the Microsoft Teams channel name

   Notes

   - Any member in a Microsoft Teams can delete the app for all the members. To avoid this scenario, OpenText recommends to remove the permissions for all the members to add or remove an app in a channel. To remove the permissions in Microsoft Teams, see the *Microsoft website*.
   - If the mapped folder is deleted from the repository, then you cannot open the app in Microsoft Teams. To resolve this issue, you must remove the app from the channel and add it again.

7. Include the third-party cookies for the Microsoft sites in browser settings if the third-party cookies are blocked while using Microsoft Teams in a web browser.

   In the Google Chrome browser settings, include the third-party cookies for the following sites:

   - [*.]microsoft.com
   - [*.]microsoftonline.com
   - [*.]teams.skype.com
   - [*.]teams.microsoft.com
   - [*.]sfbassets.com
   - [*.]skypeforbusiness.com

   For Edge browser, see the article, *Teams doesn't load* in the *Microsoft* documentation.

1.2 Add the OpenText Documentum CM for Microsoft 365 app in Microsoft SharePoint

The Microsoft SharePoint admin must deploy the OpenText Documentum CM for Microsoft 365 app to the Microsoft SharePoint admin center to make the app available in the Microsoft SharePoint Apps page.

Add the OpenText Documentum CM for Microsoft 365 app in Microsoft SharePoint:

1. Go to Microsoft SharePoint and click the site icon.
2. Click + **New** drop down and select **Page**.
3. On the **Page templates** page, go to the **Full-page apps** tab and select the **OpenText Documentum Content Management for Microsoft 365** app and click **Use this template**.
4. On the configuration window of the app, provide the OpenText Documentum CM **Username** and **Password** and click **Sign in**.
5. Select one of the options provided in the **Select the option to map SharePoint site** setting to configure the landing page of the repository:

   User location
   Selecting this option opens the repository with settings configured in OpenText Documentum CM Smart View.

   Existing folder
   Selecting this option opens the repository to navigate and choose the folder. Click **Map Folder**. Select the folder and click **Continue**.

Notes

- Selecting the **Restrict the navigation to this folder** check box limits your navigation to the selected folder and its sub folders in the repository.
- If you are adding two different OpenText Documentum CM for Microsoft 365 apps in the SharePoint site and the apps are connected to different Servers, then an error is displayed when you switch between the SharePoint pages. To resolve this, you must reload the page.

6. Click **Save**.

Edit the settings of the OpenText Documentum CM for Microsoft 365 app:

1. Go to Microsoft SharePoint and click the site icon.
2. Go to the **Pages** tab.
3. On the **Page templates** page, go to the **Apps** tab, and select the **OpenText Documentum Content Management for Microsoft 365** app and click **Edit**.
4. To change the title of the **App** page, provide the name in the **Title** text box, in the sidebar.
5. To change the App configuration, click **Settings**, and repeat steps 5 through 6 mentioned in the section “Add the OpenText Documentum CM for Microsoft 365 app in Microsoft SharePoint” on page 7.

Chapter 2

Basic navigation

This section provides details on how to navigate through the app and use the menus and functions to perform tasks.

2.1 Common elements in the UI

The following icons provide the user actions from the home page header:

OpenText logo
Click the OpenText logo to see the landing page of the OpenText™ Documentum™ Content Management client.

Search
On the home page header, you must click the **Search** button to enter your term. From the home page, you can perform a simple search that searches the entire repository. Details of the search methods are configured by your administrator.

For more information on *Sorting and filtering search results* and using *Advance searches*, see *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)*.

Note: Some of the actions *Query Form search*, *Copy link*, and *Share* that are supported in the OpenText Documentum Content Management (CM) client are not supported in OpenText Documentum CM for Microsoft 365.

My Profile
Click **My Profile** to list the following options:

- **User Settings**: You can change the user settings. See "Change the user settings" on page 10.
- **Help**: You can view the help page of OpenText Documentum CM for Microsoft 365 and *OpenText™ Documentum™ Content Management Smart View User Guide*.
- **About**: You can view the information about the installed versions of components.
- **Sign Out**: You can sign out from OpenText Documentum CM for Microsoft 365.

Favorites

Click **Favorites** to view items marked as Favorites. All items marked as favorites appear in this list.

Breadcrumb Navigation Trail

The header also displays the **Breadcrumb Navigation Trail** that shows a nested view of how you navigated to the current item.

Home

Click the **Home** icon to return to the mapped folder.

2.1.1 Change the user settings

You can change certain user settings within the user profile to personalize the user interface.

Click your **Profile > User Settings**.

Note: Some of the settings described here are restricted or controlled directly by the administrator.

User profile image

By default, the user profile image appears as user initials, but you can replace these with an image from your device. Images must be 5 MB or smaller in size. Standard image formats such as `.bmp`, `.jpeg`, `.jpg`, `.png`, `.gif`, `.svg` are supported, but can be limited by the administrator.

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

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

Sort options

Turn on the **Enable grouping of folders before files** switch to enable OpenText Documentum CM to first sort and group doclist folders, followed by files.

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:

- Enables persistent pop-up messages.
- Enables browser’s default scroll bar.
- Enables fixed horizontal column view in list views.

- Disables the Inline Action Bar.
- Displays the share and state columns in file lists.
- Displays the summary column in search results.
- Opens documents in full viewer mode regardless of menu configuration.
- Disables the document preview page and adds an open document button on the property, virtual document, and task document pages. The button opens the document in full viewer mode.

2.2 Action menus and functions

You can perform basic actions on files and folders using the **Action Bar** or the **Inline Action Bar** when in a doclist view. The doclist view displays items in a list format.

Action Bar: When you select a file or folder, the functions you can perform on the item appears on the **Action Bar**. The **Action Bar** functions are useful when you want to perform the same operation on multiple items. The available functions vary for each user.

Inline Action Bar: When in doclist view, the **Inline Action Bar** appears each time you point to a file or folder. The **Inline Action Bar** displays the functions that are available for that item and depends on your permissions for that item. Click on the **More Actions** button on the **Inline Action Bar** to view additional operations.

Common elements in Doclist view

Show Filters
Click the **Show Filters** button to toggle the search facets panel on or off.

Filter options also appear when a list of files exceeds its maximum size.

You can use wildcards when filtering lists using text. Wildcards are special characters that can stand in for unknown characters. They can help you locate items in a list or narrow down a list of items. Following wildcards are supported 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 **o**pe**n**.
- `?` 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`.

Favorite

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.

Sort

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

Settings
Includes various doclist settings:

- **Column view**:
  - **List**: shows the content of a folder in a list view. If the window showing the list is minimized, information that does not fit in the list is accessed by pressing the down arrow button.
  - **Pinned columns**: shows the content of a folder in a list view. The columns can be resized by placing the mouse in the header between two columns and dragging the arrows. If the window showing the list is minimized, a scroll bar allows you to see all the rows of information.
  - **Grid**: displays a thumbnail gallery of content. Position your pointer over a thumbnail to show the selection checkbox for the item and the **Inline Action More Actions** button. If you want to view more details about the item, click the **Metadata** button .

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

- **Column settings**: rearrange the order of the columns in the tile's doclist view by dragging and dropping the column titles in the Columns Settings drop-down list. Click the **Remove** button beside a column title to remove it. Click the **Add** button to choose a new column title.
- **Show all versions**: enables to include various versions of the documents in the doclist. Disabling this option restricts the view to the current document only.

Chapter 3

Operations on content

The following list describes the three types of content handled by OpenText Documentum CM:

- Cabinets are the folders located at the highest level of the repository.
- Folders are containers for content and to 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 (). Hover over the **Lock** icon to see which user has checked out the content.

3.1 Actions to perform on content

You can perform the following actions on folders and files. The list of available action menus are controlled by the administrator, and you might not have access to all of the items listed. You can perform these actions from the **Action Bar** or **Inline Action Bar**.

Actions on content

Add a file

Point to the content and click the **Add** button + from the header menu and click **Add file** to launch the content creation process using the selected content as a model.

Import file from PC

Point to the content and click the **Add** button + from the header menu and click **Upload file** to launch the import process from computer.

Add a folder

In an existing folder, click the **Add** button + from the header menu and click **Add folder**. Type the name of the folder and click **Save**.

Upload folder from PC

Point to the content and click the **Add** button + from the header menu and click **Upload folder** to launch the upload process from computer.

View content

Point to the file and click the **More Actions** button ••• on the **Inline Action Bar** and click **Preview in M365** to view the content.

Or, double-click the file to open the file in the appropriate viewer or to download a local copy. Click **View Native Content** in the menu to ensure you download the file in its native format.

View content properties

Point to the file and click the **Properties** button.

Depending on the content, a preview appears. Click the **View** button to display the preview if it is closed.

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

Scroll through the property page or click the property subheadings at the top of the page to navigate to the required section.

Cancel checkout

Point to the checked out content and click the **Checkout** button to cancel your checkout without committing any content changes.

Permissions

Position your pointer over the content and click the **Permissions** button to open the permissions page or click the **Down Arrow** button and select **Permissions** when viewing the folder or content's properties page.

The page shows your permissions on the content, extended permissions, and the content security name. Hover your pointer over a permission to see the full permission details. Enter the name of a user or group to view their permissions.

Print

Position the pointer over content and click the **Print** button to print an output. In some cases, an overlay or watermark might appear on the output.

Note: In the Thin content transfer mode, the document is downloaded by your browser that can be printed later.

Download content

Point to the content and click the **Download** button to download a copy to the local machine.

To create and download a `.zip` file, 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 encrypted password. It also lists files that cannot be added to the `.zip` file because of your configuration. If the list is large, you can copy the list of excluded files to your clipboard in `.csv` format.

Notes

- Depending on your configuration, you will have limitations on the number of files and/or the file size that can be downloaded.

- You cannot download empty folders.
- When you download a folder, subfolders are not included unless you select the **Include all Subfolders** option.
- Depending on the size of the `.zip` file and number of files included, the app needs time to process and create the `.zip` file. It will start to download after the .zip file is ready.
- Compressing and downloading the files is a background process, you can refresh or navigate to other pages without interrupting the process. You can only create and download one `.zip` file at a time.
- Files with PDF configuration are processed before being added to the `.zip` file.
- The `.zip` file contains a `.csv` manifest file which lists all the files and folders contained in the download.

Download file and folder manifest

To download a properties file for multiple files and folders, select them and click **Download**. A dialog box appears allowing you to download the files. Select **Download only properties** and click **Download**.

To include files in the manifest that are from subfolders within the selected folders, select **Include all Subfolders**, this will allow you to download a `.csv` manifest file listing all the selected files and folders.

Export properties

Point to the content and click the **More Actions** button on the **Inline Action Bar** and click **Export Properties** to download the file properties.

Copy and paste content

Point to the content and click the **Copy** button. Browse to the destination folder, click the **Command** button, and then click **Paste**.

Delete content

Point to the content and click the **Delete** button.

Create Relations

When viewing the properties of a folder or content, click the **Command** button next to **Properties** and select **Versions** (all the content versions available in the system), **Relations** (list of documents related to the content), or **Renditions** (the content's publication library).

In a doclist that is set to display all versions of content, click the version number indicator in the **Version** column to view a summary of the content's versions.

Add a new version

Point to the content and click the **Add Version** button to add a new version of the content. The current version is locked and you will be able to browse for a new version of the file.

Alternately, you can drag a new version of a file directly from your computer onto the current content in a doclist.

A message appears at the top of the screen notifying the success or failure of the version uploaded.

Convert to Virtual Document

Position your pointer over content and select **Convert to Virtual Document**. Virtual documents can be converted back to simple files by selecting **Convert to simple document**.

See *Convert content to a Virtual Document* topic in *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)*.

Send content to a Workflow

In a doclist, navigate to the content that you want to send to a Workflow, then position your pointer over a document and click **Workflows> (Name of your Workflow)**. If you need to select multiple documents, click the check boxes next to the documents and select **Workflows** from the toolbar menu. See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)*

Favorite content

In a doclist, click the **Favorites** button . You can add folders or content as favorites.

Mass update

Your administrator can configure mass update processes that enables you to select multiple files in your repository and 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.

For mass update, see *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)*.

3.1.1 Content collaboration with Microsoft Teams

This section provides the information about actions you can perform on the OpenText Documentum CM for Microsoft 365 app within Microsoft Teams.

Import a file

Click the **Add** button from the header menu and click **Import from M365** to import a file from the **Files** tab of Microsoft Teams. You can import multiple files at a time.

Click **Copy** or **Move** to import the selected files.

Notes

- Performing a `Copy` action keeps a copy of the latest revision of the file(s) at both the locations, Microsoft Teams **Files** tab and repository.
- Performing a `Move` action creates a copy of the latest version of the file in OpenText Documentum CM and deletes the original file from Microsoft Teams.
- Your administrator must configure the actions `Move` or `Copy` based on the requirement.

Depending on your OpenText Documentum CM Smart View configuration, the following screens appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk.

- **Upload files**: The files you selected are listed on this page. If you want more files to be imported, click + icon on the **Files** header menu to select files.
- **Select type**: Select a category from the **Category** drop-down list and provide details before continuing. As part of the category properties, select content in your repository whose metadata 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 can also choose to select from a Preset list to skip this process.
- **Edit properties**: If there is a property page associated with the type of files you have selected, this screen 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. A file indicating icon does not have its required properties verified yet. A file indicating icon confirms that it has been verified. If the remaining files in the list share property attributes with the file you are currently editing, click the icon to apply the properties to the rest of the files in the list.

  Note: The **Apply to the below files** option is enabled by default depending on your OpenText Documentum CM Smart View configuration.

Click **Continue** after you provide the details for all the files.

Check out content

Point to the file and click the **Checkout** button .

A blue lock icon appears beside the content in the doclist to indicate that you have currently locked the file.

Note: If you set a **Checkout path** in User Settings, your checked out file is downloaded to the designated checkout path. If you have not set a path, you are asked to choose a checkout location.

Check out content to Microsoft Teams

Point to the file and click the **Checkout to Teams** button .

Select the folder where you want to place the file for editing presented from the list of folders in the Microsoft Teams files tab and click **Check out**.

This action locks the document in OpenText Documentum CM and creates a linked copy into the Microsoft Teams files tab.

A blue lock icon appears beside the content in the doclist to indicate that you have currently locked the file.

You must use checkin from Teams to save it back to OpenText Documentum CM.

Note: You can edit all the file types that Microsoft Teams editor supports.

Check in content from Microsoft Teams

Point to the file and click the **Checkin from Teams** button .

A dialog box appears to update item properties or describe your edits.

A message appears at the top of the Landing page notifying you of any special checkin messages and the success or failure of your checked in item.

Notes

- Once the file is uploaded to OpenText Documentum CM after performing checkin operation, it gets deleted in the Microsoft Teams files tab.
- If the checked out file is deleted or moved before the checkin from the Microsoft Teams files tab, a **Browse** dialog box appears to navigate to the folder and locate the document again to checkin.

Edit the content

- Point to the file and click the **More Actions** button on the **Inline Action Bar** and click the **Edit in M365** button to edit a file. You can edit Microsoft Word (.docx), Excel (.xlsx), or PowerPoint (.pptx) files only. The checkin process starts after you edit and close the file. Perform checkin operations to complete the process.

  Notes

  – You cannot edit a document if the filename has unsupported special characters. Microsoft Teams does not support some special characters in a filename.

  - If a user with multiple Microsoft accounts logs out of one account and logs into the other account, the user cannot view or edit a document. To open the file, the user must access the file from the **Files** tab in Microsoft Teams before opening it from the OpenText Documentum CM for Microsoft 365 app.

- You can also download and edit the file in the local machine. You must then use the **Add version** menu to upload it.

3.1.2 Content collaboration with Microsoft SharePoint

This section provides the information about actions you can perform on the OpenText Documentum CM for Microsoft 365 app within Microsoft SharePoint.

Import a file

Click the **Add** button + from the header menu and click **Import from M365** to import a file.

Select the file (or files) from the list of files available on the Microsoft SharePoint Document Library for this Site for importing. You can also import multiple files at a time.

Click **Copy** or **Move** to import the selected files.

Notes

- Performing a `Copy` action keeps a copy of the latest revision of the file(s) at both the locations, Microsoft SharePoint Document Library and repository.
- Performing a `Move` action creates a copy of the latest version of the file in OpenText Documentum CM and deletes the original file from Microsoft SharePoint Document Library.
- Your administrator must configure the actions `Move` or `Copy` based on the requirement.

Depending on your OpenText Documentum CM Smart View configuration, the following screens appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk.

- **Upload files**: The selected files are listed on this page. Click + icon on the **Files** header menu to select files if you want more files to be imported.
- **Select type**: Select a category from the **Category** drop-down list and provide details before continuing. As part of the category properties, select content in your repository from which you want the uploaded files to inherit the metadata. To do so, select the content in **Use source content** and then select the **Properties** check box under **As blueprint for**. You can also choose to select from a preset list to skip this process.

- **Edit properties**: If there is a property page associated with the type of files you have selected, this screen 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. A file indicating icon does not have its required properties verified yet. A file indicating icon confirms that it has been verified. If the remaining files in the list share property attributes with the file you are currently editing, click the icon to apply the properties to the rest of the files in the list.

  Note: The **Apply to the below files** option is enabled by default depending on your OpenText Documentum CM Smart View configuration.

Click **Continue** after you provide the details for all the files.

Check out content to Microsoft SharePoint

Point to the file and click the **Checkout to SharePoint** button .

Select the folder where you want to place the file for editing presented from the list of folders in the Microsoft SharePoint Document Library and click **Check out**.

This action locks the document in OpenText Documentum CM and creates a linked copy into the Microsoft SharePoint Document Library.

A blue lock icon appears beside the content in the doclist to indicate that you have currently locked the file.

You must use checkin from SharePoint to save it back to OpenText Documentum CM.

Note: You can edit Microsoft Word (.docx), Excel (.xlsx), or PowerPoint (.pptx) files only.

Check in content from Microsoft SharePoint

Point to the file and click the **Checkin from SharePoint** button .

A dialog box appears to update item properties or describe your edits.

A message appears at the top of the Landing page notifying you of any special checkin messages and the success or failure of your checked in item.

Notes

- Once the file is uploaded to OpenText Documentum CM after performing checkin operation, it gets deleted in the Microsoft SharePoint Document Library.
- If the checked out file is deleted or moved before the checkin from the Microsoft SharePoint Document Library, a **Browse** dialog box appears to navigate to the folder and locate the document again to checkin.

Edit the content

- Point to the file and click the **More Actions** button ••• on the **Inline Action Bar** and click the **Edit in M365** button to edit a file. You can edit Microsoft Word (.docx), Excel (.xlsx), or PowerPoint (.pptx) files only. The file is automatically checked in after you edit and close the file.

  Note: You cannot edit a document if the filename has unsupported special characters. Microsoft SharePoint does not support some special characters in a filename.

- You can also download the file and edit the file in the local machine. You must then use the **Add version** menu to upload it.

3.2 Editing content properties

You can view and change content Properties to control content relationships, automated behavior, and the ability to find content in a search, among other uses.

For example, administrators can configure the client so that content with the `Documentation` keyword will automatically be 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 can configure and create default property templates and property pages. You can assign default properties and property fields to content by selecting a creation profile during content import or creation.

1. To view content properties, position your pointer over content or a folder in a doclist and select . Scroll through the property page, or click the property sub-headings at the top of the page to navigate to your desired section.

   Note: You might not have permission to edit property pages, or certain content properties. Contact your Administrator for more information.

2. If the properties are not editable when you open the page, click **Edit** at the top of the property page to turn on text fields, grids, combo boxes, date and time selectors, and other applicable controls. When the Smart View client switches to properties edit mode, you will not be able to navigate away from the page until you click **Save** or **Cancel**.

3. Click **Save** after you finish making your edits. The client will review your changes and let you know if the data you entered is valid. Depending on the property page configuration, you will also need to complete an electronic signature to save property changes. Follow the guided steps at the top of the property page to complete your signature.

Chapter 4

Working with Lifecycles

A lifecycle is a series of states through which content can progress. 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 a lifecycle example:

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* state after *Reviewed* state.
- If you promote a PDF from *Reviewed* to *Approved* state, 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 the lifecycle was configured, you may also need to complete an electronic signature when progressing from one state to another.

4.1 Sending content to a Lifecycle state

1. In a doclist, navigate to the file or files (see “Multi-file lifecycle support” on page 24) you want to send to a Lifecycle, then position your pointer over the document, click **Lifecycle** and provide the name of your Lifecycle state. The client evaluates the document to ensure it is permitted to enter the state. If your document 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 will have an inline menu item labelled *Move* to *Archived* that allows you to force a state change from *Draft* to *Archived*. The states skipped in the process are not evaluated, only the conditions for the target state are considered.

4.2 Multi-file lifecycle support

Users can apply a new lifecycle or perform a lifecycle state change on multiple documents. This can be performed from Doclist, Favorites, Checked out, Recently accessed, My share, Virtual document outline, Task attachments, and Workflow attachments.

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

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

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

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

4.2.1 Multiple-document lifecycle state change

Multiple document lifecycle state change can be processed in bulk or individually. It is driven by two factors:

- Your administrator has allowed bulk lifecycle transitions
- The selected document'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 configuration for the target state of the selected documents is different.

Case 2: Bulk processing of lifecycle state change for all files:

Bulk transitions are allowed **AND** the lifecycle configuration for the target state of the selected documents is same **OR** the lifecycle configuration for the target state of the selected documents is different, but the next state configuration for all applicable lifecycles is exactly the same.

4.2.1.1 Individual processing of lifecycle state change for each file

- 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 if bulk transitions are not allowed, the user must process files in sequential order.
- In this case, a dialog opens with a two-pane view.
  - Left pane – selected files list
  - Right pane – Current file being processed
- The lifecycle state change for a document includes the following components, it 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

4.2.1.2 Bulk processing of lifecycle state change for all files

- After selecting multiple files for a lifecycle state change, if the selected files are resolved with the same or similar lifecycle in the next state and the bulk transitions are allowed, the user can perform a lifecycle state change for all the files in bulk.
- The lifecycle state change for a document has the following components:
  - Confirmation message
  - e-Signature
  - Properties
- The above user interface components are optional and their appearance is based on the lifecycle next state configuration