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OpenText™ Documentum™ Content Management

Workspaces Admin Console Guide

Create and manage workspace types, permission templates, and templates. Import and export workspace types.

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Workspaces Admin Console Guide

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Table of Contents

Chapter 1

Overview

In OpenText Documentum Content Management (CM), a workspace is a special type of content container that is created from a *workspace type*. Workspaces allow Smart View 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.

Workspace types

Administrators create workspace types in Admin Console to configure initial settings for workspaces. Each workspace type defines a collection of metadata, *roles*, *permission templates*, and *templates*. 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 choose which template to use. You can think of a workspace type as a blueprint, and a workspace as an instance of that blueprint.

Attributes

Workspace type attributes are the fields used to store and display workspace metadata. In Smart View, attributes are referred to as *properties*. When users create a workspace, they are prompted to fill in these fields. Various attribute data types are supported, such as boolean, string, and integer.

Roles

Administrators can create one or more roles for a workspace type. Roles are custom groups of users that can be assigned different permissions. Roles in a workspace initially have no members. Users with the appropriate permission can later manage role membership in Smart View by adding and removing users or groups in a role as needed.

Unlike user groups, roles are valid only within the context of a workspace instance. In a workspace type, different permissions can be configured for different roles, and these role permissions can be added to a workspace type permission template together with permissions configured for users or groups. The permission template can then be applied to a workspace type template, enabling the use of these role permissions to control access in any workspace created from that template. Because role membership can be defined for a specific workspace instance, the context of a role permission can be restricted to the individual workspace level.

Workspace roles are optional but are useful in a number of cases. For example, you can use roles to create custom user groups if configuring permissions for existing groups does not meet your customization needs. Because you can add groups as members of a role, you can also create a role to easily define workspace-level permissions for one or more groups of users without having to separately add each user as a member of the role. Roles can also be used if you want to configure permissions at the user level but are not familiar with all your users or new users are added after you create a workspace type. In either case, you can assign permissions to those users by later adding them to the appropriate roles in Smart View without having to re-configure the workspace type in Admin Console.

Permission templates

Administrators can create one or more permission templates for a workspace type. Permission templates consist of a set of permissions configured for one or more workspace roles, groups, or users. For example, a permission template might consist of Delete permission for a Supervisor role, Write permission for a Reports Designer group, and Read permission for User1. Administrators can control access in a workspace by applying permission templates to the template used by the workspace.

Permission templates are optional and it is possible to have a workspace type without any permission templates. However, if you want to control access to any of the workspace type’s workspaces, you must create at least one workspace type template that uses at least one permission template.

Templates

Administrators create one or more templates for a workspace type. When users create a workspace in Smart View, they select a workspace type and one of its templates. For example, an Insurance Claims workspace type might have a template for Accident Claims, another one for Health Claims, and another one for Home Claims.

Templates define the workspace folder structure, which can consist of one or more folder trees. When a workspace is created, it is populated with the folder structure defined in the selected template.

Administrators can control access to the folder structure by assigning permission templates. Each folder in the structure, regardless of its level, can be assigned a permission template. A folder can also be assigned one or more document types. The document type restricts folder content to only documents with a valid document type and defines the content creation template applied when folder content is created. Permission templates can also be assigned to a folder’s document type to control access to documents with that type in that folder.

Permission templates are inherited from parent folders, including the root folder, and any permission templates assigned to a sub-folder override ones assigned to the parent. Document types and any permission templates assigned to them are also inherited from parent folders. As with folders, document types assigned to sub-folders override parent folders, as do permission templates assigned to the document types.

It is possible to create a template that only defines the workspace folder structure. If you do not want to control access to a workspace type’s workspaces, simply do not assign a permission template or a document type to any of the folders in the structure. It is also possible to control access to a folder by only assigning it a document type. Any folder can be assigned just a permission template or just a document type. It is also possible to configure access to the entire folder structure by assigning a permission template or document type to the root folder.

In Smart View, users can create new folders in a specific workspace instance. In these cases, the new folder inherits any permission template or document types assigned to the parent folder.

Chapter 2

Best practices

This section provides some best practices for designing and managing workspaces.

1. Workspace locations define the folders in your repository where workspaces can be created and stored. Use descriptive names for these folders and group folders in meaningful ways to assist user navigation.
2. Structure location folders to avoid deep structures and long folder paths.
3. Dedicate workspace location folders to workspaces and avoid adding other types of content. Operations that can be performed on other types of content in a workspace folder are not supported for workspaces. Performing these operations in a workspace folder can therefore have unintended consequences.
4. Create roles to manage access at the workspace level. Use a consistent naming convention for roles across different business types. For example, create a Supervisor role for each of your workspace types.
5. Try to configure permissions only for roles or groups. Avoid configuring permissions for individual users.
6. Create separate permission templates for each template root folder, its sub-folders, and its document types to define more granular access to folders in a workspace. For example, a workspace type could contain a template that has two sub-folders that are assigned three different document types. You could create six permission templates and assign one to the root folder, one to each sub-folder, and one to each document type assigned to the sub-folders.
7. Access to documents in a folder is defined by the permission template assigned to the folder or by the permission template assigned to a document type assigned to the folder. To apply different sets of permissions to documents inside the same folder, add a sub-folder or assign a document type to the folder for each set of permissions and assign the permission templates accordingly.
8. The higher you are in the folder structure, the more users have restricted access. The lower you are in the folder structure, the fewer users have access but with more liberal permissions.
9. Carefully design and create roles, permission templates, and templates *before* any workspaces are created. Changes can be made to these components but they will not always be reflected in existing workspaces. For more information on the effect of these changes, see “Configure workspace types“ on page 11.

Chapter 3

Configure workspace types

You can configure the following settings and components for a workspace type:

Display name, System name, and Description

A workspace type **Display name** and **Description** are displayed in Smart View. A **System name** is required and is automatically populated based on what you enter as the **Display name**. You can change the populated value but it cannot contain non-Latin characters, spaces, capital letters, or special characters other than underscore (_). The **System name** value is used to create the workspace type's `dm_bws` object type (see the important note about configuration in client configuration).

A **Display name** is not required. If none is entered, the **System name** is displayed instead.

Display name and **Description** can be edited after the workspace type is saved, and changes are reflected in both existing and new workspaces. Once a workspace type is saved, the **System name** becomes permanent and cannot be changed.

Locations

Workspace locations specify the directories in the repository where workspaces can be located. Users can create workspaces only within a location specified by the workspace type. A workspace type can have more than one location, and you can specify whether a location includes sub-folders.

Locations can be added and removed after the workspace type is saved. Existing workspaces in a location that is removed remain in the location's folders but no new workspaces can be added there.

Workspace icon

Workspace icons are displayed for each instance of the workspace type in Smart View. Workspace icons can be changed after the workspace type is saved, and the change is reflected in both existing and new workspaces.

Additional custom icons can be configured in client configuration. For more information, see section 13.34 "Configuring Icons and Text Color for Content in List Widgets (Smart View)" in *OpenText Documentum Content Management - Client Configuration Help (EDCCL-H-AGD)*.

Attributes

Workspace type attributes are the fields used to store and display workspace properties in Smart View. A data type must be defined for each attribute (sse "Attribute data types" on page 27). When users create a workspace, they are prompted to fill in these fields.

Attributes added after the workspace type is saved are reflected in both existing and new workspaces. Attribute **Display names** can be edited after the workspace type is saved, and the changes are reflected in both existing and new workspaces. Attribute **Types** cannot be changed after the workspace type is saved. For attributes of **Type String**, **Size** can only be incremented after the workspace type is saved. After the workspace type is saved, attributes can be deleted only if no instances of the workspace type have been created in Smart View.

An attribute **System name** is required and is automatically populated based on what you enter as the **Display name**. You can change the populated value but it cannot contain non-Latin characters, spaces, capital letters, or special characters other than underscore (_). You cannot change **System name** after the workspace type is saved.

Roles

Roles are optional and are available for use when you create a workspace type permission template. Each role's permission, for example, Write or Delete, is configured in the permission template. One role can have the **Role members can add or remove members of all workspace roles** check box selected, but this capability is optional. The role that has the capability can be changed, but only one role can have it at a time. By default, the creator of a workspace instance has the capability.

Roles can be edited. Roles used in a permission template cannot be deleted. Any changes made to any role (adding, editing, or deleting) automatically set all workspace type templates to draft mode when you save the workspace type (see "Publish a template" on page 19).

Note: You must save the workspace type before proceeding to add permission templates.

Permission templates

Permission templates are optional. They consist of a set of permissions configured for one or more workspace roles, users, or groups. Workspace roles are created for a workspace type and are valid only within the context of a workspace. Users and groups are created and managed in OpenText Documentum Content Management (CM) Documentum Administrator and are valid within the context of your environment. .

Note: Some groups cannot be used in permission templates. These include *dm_** and *dmc_** groups, and private groups.

Permission templates can be applied to individual folders in a template to control access to the folder. Each permission in a permission template assigns a permission level to the role, group, or user. Valid permission levels are 1. None, 2. Browser, 3. Read, 4. Relate, 5. Version, 6. Write, and 7. Delete (see "Permission levels" on page 28). Permission levels are cumulative. For example, a group with a Delete permission level has all seven permission levels. At least one user or group must be assigned a Delete permission level.

Each permission template has two pre-defined permissions: *dm_owner* and *dm_world*. These permissions are automatically created and cannot be deleted. The creator of a workspace automatically becomes *dm_owner*. By default, *dm_owner* has Delete permission and *dm_world* has Read permission. You can change the default levels if needed.

You can edit permission templates. If you edit a permission template used in a template, including making changes to its permissions, the template is automatically set to draft mode when the permission template is saved. You cannot delete a permission template used in a template.

Note: If there is a conflict between permission levels, the highest level takes precedence. For example, if User1 is in group A, group A has Delete permission, and User1 has only Read permission, Delete permission takes precedence and User1 has Delete permission. This policy applies across all roles, groups, and users.

Templates

Templates define the folder structure of workspaces created from them. They can also be configured to control access to individual folders in the structure by assigning them permission templates or document types. Folders can contain only documents with a valid document type, and the document type defines the content creation template that is applied when content is created in the folder. Permission templates can be assigned at the root, sub-folder, and document type level. Only one permission template can be assigned to each folder, but a folder can have more than one document type assigned to it. Permission templates and document types are inherited but can be overridden at the sub-folder level.

Workspace types can have more than one template, but at least one template must be created. The template can solely define the folder structure and need not have any permission templates or document types assigned.

When a template is initially created, it is saved in draft mode. Before a template can be selected in Smart View, it must be published. At that point, the template is saved as version 1.0. When the template is edited, a new draft is created. When that draft is published, it becomes version 1.1 and is the current version. New workspaces are always created from the current version, and existing workspaces continue to use the version that was current when they were created. Templates that are used by an existing workspace cannot be deleted.

Any time changes are made to any of the workspace type's roles, new drafts of the workspace type's templates are automatically created when the workspace type is saved. Any time changes are made to a permission template used by a template, a new draft of the template is automatically created when the permission template is saved.

Important

After attributes are added to a workspace type and the workspace type is saved, an administrator must configure a property page in client configuration corresponding to the `dm_bws` object type created for the workspace type from its **System name** and including attributes for the workspace type attributes based on their **System names**. A workspace type is not available in Smart View until this configuration is complete.

For more information about configuring a property page, see section 3.3 "Configuring a Property Page" in *OpenText Documentum Content Management -*

Client Configuration Help (EDCCL-H-AGD). The electronic signature option is not supported in workspace type property pages. For more information about the workspace type object type, see section 3.23 "Business Workspace Type Definition" in *OpenText Documentum Content Management - Server System Object Reference Guide (EDCCS-ORD)*.

3.1 Add a workspace type

The first step in adding a workspace type is to enter general information and add attributes and roles in the **New workspace type** page. After you save the workspace type, you can proceed to add permission templates and templates.

Note: You can save the workspace type at any time by clicking **Save** at the top of the page. To reset page values to their state the last time the workspace was saved, click **Reset**.

Add general details:

1. On the **Home** page, click the **Workspaces** tile and then click the **Workspace types** tile.

2. On the **Workspace types** page, click **Add** +, and then click **Workspace type**.

3. On the **New workspace type** page, in the **General** area, type the name of the workspace type in **Display name** as you want it to appear in Smart View.

   System name is automatically populated based on what you enter. You can change the populated value but it cannot contain non-Latin characters, spaces, capital letters, or special characters other than underscore (_). If you enter a **Display name** with non-Latin characters, **System name** is not automatically populated and you must enter a value manually. You cannot change **System name** after the workspace type is saved.

4. Optional Type a **Description** of the workspace type.

5. In the **Locations** table, select the locations in the repository where workspaces can be located. Users can create workspaces in Smart View only in these locations. Workspace types mush have at least one location.

   Click **Browse**, select the folder, and click **Select**. To allow workspaces in sub-folders, select the **Include subfolder** check box.

   To add more locations, point to the table and click. To remove a location, point to the location's row and click. To view a location's directory path, point to the location.

6. Under **Workspace Icon**, click and select the icon you want displayed for the workspaces in Smart View.

7. Proceed to add attributes.

Add attributes:

1. In the **Attributes** area, click **Add** +.
2. In the **Add Attribute** panel, in **Display name**, type the name of the attribute as you want it to appear in Smart View.

   System name is automatically populated based on what you enter. You can change the populated value but it cannot contain non-Latin characters, spaces, capital letters, or special characters other than underscore (_). If you enter a **Display name** with non-Latin characters, **System name** is not automatically populated and you must enter a value manually. You cannot change **System name** after the workspace type is saved.
3. In the **Type** list, choose the data type for the attribute. For more information, see "Attribute data types" on page 27. If you select **String**, type a maximum **Size** in characters. The default value is `32`.

   You cannot change **Type** after the workspace type is saved. For attributes of **Type String**, **Size** can only be incremented after the workspace type is saved.
4. Optional To allow users to enter multiple values for the attribute, select the **Repeating** check box.
5. Click **Add**.

   The new attribute appears in the **Attributes** table.
6. Optional Continue to add attributes as required following the same steps.
7. Proceed to add roles.

Add roles:

1. In the **Roles** area, click **Add** +.
2. In the **Add Role** panel, type a **Name** for the role and optionally type a **Description**.
3. Optional Type a **Description** of the role.
4. Optional To allow members of the role to add or remove members in all workspace type roles, select the **Role members can add or remove members al all workspace roles** check box. Only one role in the workspace type can have this capability but the capability is optional.
5. Click **Add**.

   The new role appears in the **Roles** table.
6. Optional Continue to add roles as required following the same steps.
7. To save the workspace type, click **Save** at the top of the page. See the important note about configuration in client configuration.

8. Proceed to add permission templates. See “Add permission templates to a workspace type” on page 16.

3.2 Add permission templates to a workspace type

Add permission templates:

1. On the **Workspace types** page, point to the workspace type and click **Edit**. You can also click the workspace type.

2. On the workspace type page, in the **Permission Templates** area, click **Add**.

3. On the **New permission template** page, type a **Name** for the permission template and optionally type a **Description**.

4. Add permissions to the permission template:

   a. Under **Permissions**, click **Add** and choose whether the permission is for a **Workspace role**, a **Group**, or a **User**.

   b. In the **Add** dialog box, select the workspace role, group, or user, select the **Permission level** you want to assign, and then click **Done**. For more information, see “Permission levels” on page 28.

      The new permission appears in the **Permissions** table.

   c. Optional Continue to add permissions as required following the same steps.

   Notes

   - Two permissions are automatically added to the permission template: *dm_owner* and *dm_world*. The creator of a workspace automatically becomes *dm_owner*. By default, *dm_owner* has Delete permission and *dm_world* has Read permission. You can change the default permission levels if needed, but you cannot delete the permissions.
   - At least one user or group permission must have Delete permission.

5. To save the permission template, click **Save** at the top of the page.

6. To go back to the workspace type page, click **Back** at the top of the page.

   The new permission template appears in the **Permission Templates** table.

7. Optional Continue to add permission templates as required following the same steps.

8. To save the workspace type, click **Save** at the top of the page.

9. Proceed to add templates. See Add templates to a workspace type.

3.3 Add templates to a workspace type

Add templates:

1. On the **Workspace types** page, point to the workspace type and click **Edit**. You can also click the workspace type.
2. On the workspace type page, in the **Templates** area, click **Add** +.
3. On the **New template** page, type a **Name** for the template and optionally type a **Description**.

   Note: All new templates start with a folder structure displayed in the **Folders** area consisting of just the **Documents** root folder.

4. Optional Add sub-folders to the structure and assign them permission templates or document types:

   a. To add a sub-folder and assign it a permission template:

      i. Select the parent folder in the folder structure and click **Add** +. You can also click the folder's **Actions** button and then click **New folder** (not available for the root **Documents** folder).
      ii. In the **New folder** panel, type the **Folder name** as you would like it to appear in Smart View.
      iii. Optional To assign a permission template to the new folder, choose the permission template in the **Permissions** list. Only one permission template can be assigned to a folder.

         To view the permissions configured for the selected permission template, click **Show permissions** below the **Permissions** list.
      iv. Optional To assign one or more document types to the folder, choose a type in the **Document types** list. To add another document type, click the **Add new field** button below your selection and choose the type. Continue to add document types following the same steps.
      v. Click **Add**.

      The new sub-folder appears in the folder structure showing the assigned permission template and document types, if any. You can expand and collapse folders as needed.

      Note: You do not need to assign a permission template or document types to a folder.

   b. To assign a permission template to a document type:

      i. Select the document type in the folder structure.
      ii. In the document type's panel, choose the permission template in the **Permissions** list.

To view the permissions configured for the selected permission template, click **Show permissions** below the **Permissions** list. Only one permission template can be assigned to a document type.

iii. Click **Save**.

Changes are reflected in the document structure.

c. To change a folder's permission template or document type assignments:

i. Select the folder in the folder structure.

ii. In the folder's panel, make changes to the folder's name, and permission template and document type selections as required as described in the steps above.

To remove a permission template or document type assigned to the folder, point to the permission template or document type, and click ×.

To remove a permission template assigned to a document type, point to the document type, and click ×.

iii. Click **Save**.

Changes are reflected in the document structure.

5. Optional To remove a folder from the folder structure, select the folder, click the folder's **Actions** button ⋯, and then click **Remove**.

   You cannot remove the root **Documents** folder.

6. Optional To rename a folder:

   a. Select the folder, click the folder's **Actions** button ⋯, and then click **Rename**. You can also rename it in the folder panel.

   b. Type a new name for the folder and click ✓.

7. Optional To change the folder structure, drag folders to their new locations as required. You cannot move the **Documents** root folder.

8. To save the template, click **Save** at the top of the page.

9. Optional To publish the template, click **Publish template** at the top of the page. You can choose to leave the template in draft mode and publish it at a later time. For more information, see "Publish a template" on page 19.

10. To go back to the workspace type page, click **Back** ← at the top of the page.

11. Optional Continue to add templates as required, following the same steps.

12. To save the workspace type, click **Save** at the top of the page.

13. See "Publish a template" on page 19.

3.4 Publish a template

When a template is initially created, it is saved in draft mode. Before a template can be selected in Smart View, it must be published. Draft mode allows you to continue configuring a template until it is ready and can be made available for use.

When a template is first published, it is saved as version 1.0. If the template is edited, a new draft is created. When that draft is published, it becomes version 1.1 and is the current version. New workspaces are always created from the current version, and existing workspaces continue to use the version that was current when they were created.

The **Templates** table on the workspace type's page displays the current version of each template. If a template is in draft mode, it is labelled as **Draft**.

Templates are automatically set to draft mode when any of the following happens:

- A user explicitly edits the template.
- Changes are made to the workspace type's roles, including adding, editing, and deleting.
- A permission template used by the template is edited.

Note: When the changes are saved, you are prompted for confirmation. To proceed, click **Save**.

You can publish a template in one of the following ways:

- On the template page, save the template and click **Publish template** at the top of the page.
- On the workspace type page, after you save the workspace type, point to the template in the **Templates** table and click **Publish**.→|. You can also select the template and click **Publish** on the **Action Menu**.

3.5 Edit a workspace type

You can edit a workspace type's general information, roles, permission templates, and templates. You can delete a workspace type if no instances of it have been created in Smart View.

- "Edit general information" on page 20
- "Edit permission templates" on page 21
- "Edit templates" on page 23

Edit general information

Note: You can undo changes before you save the workspace type by clicking **Reset** at the top of the page.

Edit names and description:

1. On the **Workspace types** page, point to the workspace type and click **Edit**. You can also click the workspace type.
2. Edit **Display name** and **Description** as needed. For more help, see **To add a workspace** type in "Add a workspace type" on page 14.
3. To save the workspace type, click **Save** at the top of the page.

Edit locations:

1. On the workspace type page, scroll down to **Locations**.

   To view a location's folder path, point to the location in the table.
2. Do any of the following:

   a. To add a location, point to the table and click . Click **Browse**, select the folder, and click **Select**. To allow workspaces in sub-folders, click the location's **Include subfolders** check box.

   b. To remove a location, point to it in the table and click .
3. To save the workspace type, click **Save** at the top of the page.

Notes

- A workspace type must have at least one location.
- Changes to locations are reflected in both existing and new workspaces. Existing workspaces remain in any removed locations but no new workspaces can be added there.

Change the workspace icon:

1. On the workspace type page, scroll down to **Workspace Icon**, click , and select the new icon.

   The new icon is applied to both existing workspaces and new workspaces.
2. To save the workspace type, click **Save** at the top of the page.

Edit attributes:

1. On the workspace type page, click **Attributes**.
2. Do any of the following. For more help, see **To add attributes** in "Add a workspace type" on page 14.

a. To edit an attribute, point to the attribute in the table and click **Edit**, make the necessary changes in the **Edit attribute** panel, and click **Save**.

b. To add a new attribute, click **Add**, enter details in the **Add Attribute** panel, choose a **Type**, and click **Add**. The new attribute appears in the **Attributes** table.

c. To delete an attribute, point to the attribute in the table and click **Delete**. You can also select the attribute and click **Delete** on the **Action Bar**.

3. To save the workspace type, click **Save** at the top of the page.

Notes

- If the **Delete** button does not appear, you cannot delete the attribute. You cannot delete attributes if any instances of the workspace type have been created in Smart View.
- Changes made to attributes are reflected in both existing and new workspace.

Edit roles:

1. On the **Workspace types** page, click **Roles**.
2. Do any of the following. For more help, see **To add roles** in "Add a workspace type" on page 14.

   a. To edit a role, point to the role in the **Roles** table and click **Edit**, make the necessary changes in the **Edit role** panel, and click **Save**.

   b. To add a new role, click **Add**, enter details in the **Add Role** panel, and click **Add**. The new role appears in the **Roles** table.

   c. To delete a role, point to the role in the table and click **Delete**. You can also select the role and click **Delete** on the **Action Bar**.

   Note: If the **Delete** button does not appear, you cannot delete the role. You cannot delete roles used in a permission template.

3. To save the workspace type, click **Save** at the top of the page.

Note: Any changes made to roles (adding, editing, or deleting), automatically set all workspace type templates to draft mode when you save the workspace type. For more information, see "Publish a template" on page 19.

Edit permission templates

Note: You can undo changes before you save the permission template by clicking **Reset** at the top of the page.

Edit permission templates:

1. On the **Workspace types** page, point to the workspace type and click **Edit**. You can also click the workspace type.
2. Click **Permission Templates**.
3. Do any of the following. For more help, see "Add permission templates to a workspace type" on page 16.
    a. To edit a permission template:
        i. Point to the permission template in the **Permission Templates** table and click **Edit** You can also click the permission template.
        ii. On the permission template page, make the necessary changes, including changes to the permissions. For more help, see To edit permissions in a permission template.
        iii. To save the permission template, click **Save** at the top of the page.

        Note: When you edit a permission template used by a template, the template is automatically set to draft mode when you save the permission template. For more information see "Publish a template" on page 19.

        iv. To go back to the workspace type page, click **Back** ←.
    b. To add a new permission template:
        i. Click **Add** +. On the **New permission template** page, enter details as required.
        ii. Add permissions to the permission template as required. For more help, see "Add permission templates to a workspace type" on page 16.
        iii. To save the permission template, click **Save** at the top of the page.
        iv. To go back to the workspace type page, click **Back** ←.
    c. To delete a permission template, point to the template and click **Delete**. You can also select the permission template and click **Delete** on the **Action Bar**.

        Note: If the **Delete** button does not appear, you cannot delete the permission template. Permission templates used in a template cannot be deleted.

4. To save the workspace type, click **Save** at the top of the page.

Edit permissions in a permission template:

1. On the workspace type page, click **Permission Templates**.
2. In the **Permission Templates** table, point to the permission template and click **Edit** You can also click the permission template.

The permission template page opens.

3. Do any of the following:

    a. To change a permission's permission level, click its **Permission level** in the **Permissions** table and choose the new permission level.
    b. To add a new permission. For more information, see "Add permission templates to a workspace type" on page 16.

        i. Click **Add** + and choose whether the permission is for a **Workspace role**, a **Group**, or a **User**.
        ii. In the **Add** dialog box, select the workspace role, group, or user, select the **Permission level** you want to assign, and then click **Done**.

    The new permission appears in the **Permissions** table.

    c. To delete a permission, point to the permission and click **Delete**. You can also select the permission and click **Delete** on the **Action Bar**.

    You cannot delete the **dm_owner** or **dm_world** permission.

4. To save the permission template, click **Save** at the top of the page.

    Note: If the permission template is used by a template, the template is automatically set to draft mode when you save the permission template. For more information see "Publish a template" on page 19.

5. To go back to the workspace type page, click **Back** ←.

6. To save the workspace type, click **Save** at the top of the page.

Edit templates

Notes

- You can undo changes made to a template before saving the template by clicking **Reset** at the top of the page.
- Any changes made to a template automatically set the template to draft mode when you save it. You can publish the template after you save it by clicking **Publish template** at the top of the template page. You can also publish the template at a later time. For for information see "Publish a template" on page 19

Edit template details:

1. On the **Workspace types** page, point to the workspace type and click **Edit**. You can also click the workspace type.

2. Click **Templates**.

3. In the **Templates** table, point to the template and click **Edit**. You can also click the template.

4. On the template page, make changes to details as required and click **Save** at the top of the page.

5. To go back to the workspace type page, click **Back** ←.

6. To save the workspace type, click **Save** at the top of the page.

Edit a template's folder structure and permission template assignments:

1. In the **Templates** table, point to the template and click **Edit**. You can also click the template.

2. On the template page under **Folders**, make changes as required. For more information, see "Add templates to a workspace type" on page 17.

3. Click **Save** a the top of the page.

4. To go back to the workspace type page, click **Back** ←.

5. To save the workspace type, click **Save** at the top of the page.

Delete a template:

1. In the **Templates** table, point to the template and click **Delete**. You can also select the template and click on the **Action Bar**.

   Note: If the **Delete** button does not appear, you cannot delete the template. You cannot delete a template that is used by a workspace type instance.

2. To save the workspace type, click **Save** at the top of the page.

Chapter 4

Export and import workspace types

Workspace types can be moved across systems by exporting them from one system as a JSON file and importing the JSON files into another system.

Note the following when exporting and importing workspace types:

- Do not edit the JSON file. Editing the file could introduce errors in the workspace type data or even cause an import to fail.
- Group and user permissions configured in permission templates are not exported with the workspace types. Roles and role permissions are exported.
- Templates in draft mode are not exported. Only the latest published version of a template is exported and can be imported in the target system.
- If an imported workspace type contains a location that does not exist in the target system, the location is omitted from the import. It may be necessary to add locations to workspace types after they are imported.

4.1 Export workspace types

Export one or more workspace types:

1. On the **Workspace types** page, point to the workspace type and click **Export** . To export multiple workspace types, select them and click **Export** on the **Action Bar**.
2. In the **Export** dialog box, click **Export**. You can change the default **Export file name**.

   The file is downloaded to your `Downloads` folder with the `.json` extension.

Export all workspace types:

1. On the **Workspace types** page, click **Export all** .
2. In the **Export** dialog box, click **Export**. You can change the default **Export file name**.

   The file is downloaded to your `Downloads` folder with the `.json` extension.

4.2 Import workspace types

Import a workspace type JSON file:

1. On the **Workspace types** page, click **Add** +, and then click **Import**
2. Select the JSON file and click **Open**.
3. When the import is finished, click **Refresh** to view the imported workspace type or types in the **Workspace types** table.

Chapter 5

Reference

5.1 Attribute data types

"Attribute data types" on page 27 describes the available data types for workspace type attributes. For help on adding attributes to a workspace type, see "Add a workspace type" on page 14.

Table 5-1: Attribute data types

Type	Description
Boolean	Represents a logical value that can be only one of two states: true or false. Stored as `1` for true and `0` for false. Used for attributes that indicate a binary condition, such as *is active*, *is approved*, *has attachments*, or other yes/no flags. The default value is `0`.
String	Stores alphanumeric characters, words, sentences, or any sequence of characters. A fundamental type for storing descriptive information, such as document titles, descriptions, author names, keywords, and any other textual metadata. You must enter a maximum size in characters. The default size is `32`.
Integer	Stores whole numbers (positive, negative, or zero) without any decimals. Suitable for attributes that represent counts, quantities, version numbers, or other numerical identifiers that are always whole numbers. The value range is `-2147483648` to `+2147483647`.
ID	Unique identifier assigned to every object in a repository. Typically a string of 16 hexadecimal characters. Primarily used internally to uniquely identify and reference objects (documents, folders, users, etc.). While it is a string of characters, its purpose is specifically for identification rather than general text.
Time	Refers to date and time values. Used to capture precise timestamps for events such as creation, modification, or specific deadlines. The default value is the current time.
Double	Stores floating-point numbers, which can have decimals. Provides a higher precision than a single-precision float. Used for attributes that require decimal values, such as financial amounts, measurements, percentages, or other numerical data that may not be whole numbers.
Repeating	Not a fundamental data type in the same way as String or Integer, but rather a property characteristic. A repeating property allows an attribute to hold multiple values of a specified data type. For example, a document could have multiple authors or multiple keywords. Used when an attribute needs to store a list of values rather than a single value.

For more information on data types in OpenText Documentum CM, see section 2.2 "Property datatypes" in *OpenText Documentum Content Management - Server System Object Reference Guide (EDCCS-ORD)*.

5.2 Permission levels

"Permission levels" on page 28 describes the permission levels that can be assigned to workspace role, group, and user permissions in a workspace type permission template. For help on adding permissions to a workspace type permission template, see "Add permission templates to a workspace type" on page 16.

Table 5-2: Permission levels

Level	Permissions
1. None	No access is permitted to the object. The object is not visible to the user.
2. Browse	Users can view the object's properties/attribute values, including its location, but cannot view the content of the object.
3. Read	Users can view both the properties/attribute values and the content of the object, but cannot update the object.
4. Relate	Users can do all of the above (Browse, Read) and add annotations to the object.
5. Version	Users can do all of the above (Browse, Read, Relate), modify the content of the object, and check in a new version (with a new version number). Users cannot overwrite an existing version or edit the object properties.
6. Write	Users can do all of the above (Browse through Version), edit object properties, and check in the object as the same version, thus overwriting the existing version.
7. Delete	Users can do all of the above (Browse through Write) and delete objects. This is the highest level of access.