



## OpenText™ Documentum™ Content Services for SAP® Solutions

### User Guide

Store and view documents using the SAP graphical user interface.

EDCCOSAPCS250400-UGD-EN-01

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## **OpenText™ Documentum™ Content Services for SAP® Solutions**

### **User Guide**

EDCCOSAPCS250400-UGD-EN-01

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This documentation has been created for OpenText™ Documentum™ Content Services for SAP® Solutions 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

# Introducing Documentum Content Services for SAP Solutions

### 1.1 Overview

The Documentum Content Services for SAP Solutions (CS SAP) application integrates the Documentum content management system with the SAP R/3 or ERP Central Component (ECC) system. It is an interface to the SAP R/3 or ECC system based on SAP standard Document Management System (DMS) and ArchiveLink interfaces.

Documentum Content Services for SAP Solutions provides the following functions:

- Enables users to easily access and display documents stored in a OpenText™ Documentum™ Content Management repository from a variety of SAP modules.
- Links documents stored in OpenText Documentum Content Management (CM) to a variety of SAP documents.
- Archives SAP data, reports, and documents through ArchiveLink certified interfaces in OpenText Documentum CM.



**Note:** To use Documentum Content Services for SAP Solutions with HTTP archiving services, install Documentum Archive Services for SAP Solutions, as described in the *OpenText Documentum Archive Services for SAP Solutions - Installation Guide (EDCCOSAPAR250200-IGD)*.

- Stores and manages reports and outgoing documents in OpenText Documentum CM.

### 1.2 Intended audience

To address the manuals to the correct audience, the roles of the users of the manuals have been defined as follows:

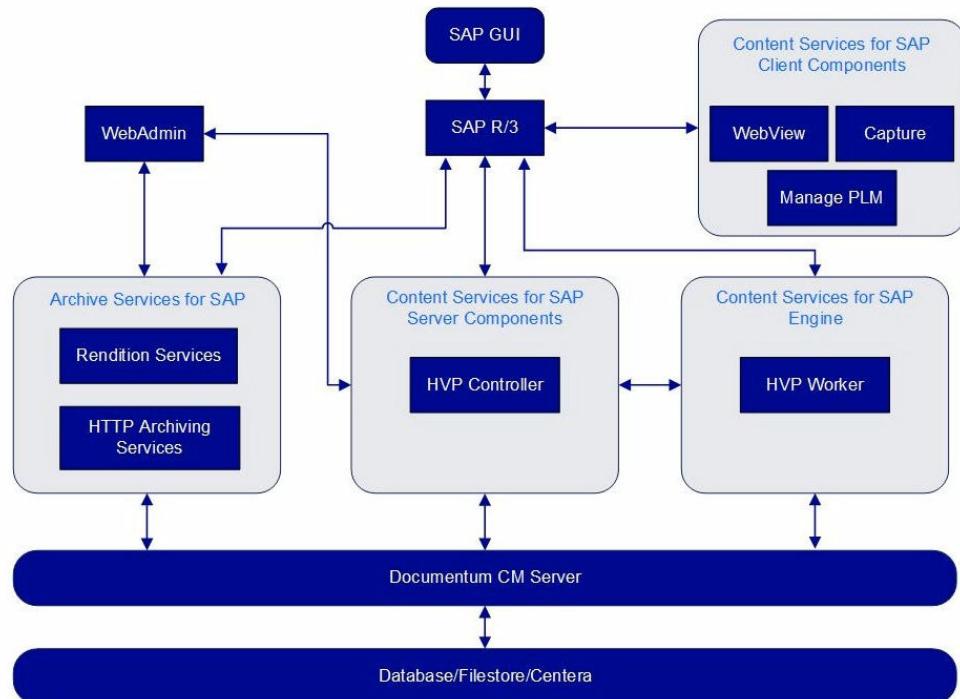
- System Administrator – This role covers users who install and configure Documentum Content Services for SAP Solutions. The Documentum Content Services for SAP Solutions application integrates OpenText Documentum CM with the SAP R/3 system.
- Content Services Administrator – This role covers users who manage Documentum Content Services for SAP Solutions using WebAdmin console.
- Document Controller – This role covers users who release documents to SAP and maintain the links to those documents.

- Standard User – This role covers users who view documents using SAPGUI and the View component of Content Services.

This manual is written for standard users.

This manual forms part of a documentation suite designed to support those who install, configure, and use Documentum Content Services for SAP Solutions. The product and documentation suite can be found on OpenText My Support (<https://support.opentext.com/>).

## 1.3 Documentum Content Services for SAP Solutions architecture



**Figure 1-1: Documentum Content Services for SAP Solutions and SAP**

 **Note:** Content Services for SAP Solutions capture component is not present in the 7.2 and later releases.

Documentum Content Services for SAP Solutions consists of the following components:

- WebAdmin

An administrative console that allows you to:

- Perform archiving services.

Using WebAdmin, you can perform the following archiving services:

- Create, configure, and manage archives.
- Manage certificates for the archive.
- Configure document archival for Documentum Content Services for SAP Solutions.

- Perform DMS-related services. You can:
  - Configure batch jobs for linking and replication tasks.
  - Schedule and manage the execution of linking and replication jobs.
- High Volume Processing Server (HVPS)

A server component that allows you to automate the linking between SAP objects and documents, as well as maintain those links. This automation improves productivity, information integrity, and information availability. HVPS is a Java-based component. The following are the two main components:

- HVP Controller: This server component is packaged as the HVPS.dar file. HVP Controller runs in the realm of the method server and delegates the jobs executed from the WebAdmin to the registered HVP Workers.
  - HVP Worker: The Worker is a .war file which can be installed on any supported application server. For more information about the supported application servers, see the product *Release notes*. The jobs delegated by the controller are executed by the HVP Worker. The HVP Worker packages OpenText™ Documentum™ Content Management Foundation Java API libraries that are used to communicate with the repository. It communicates with SAP using the SAP JCo v3.1.x libraries. The JCo libraries have to be downloaded from the SAP marketplace into the lib directory of HVP Worker.
- View  
View is a thick client which must be installed on every client computer that needs to access reports, drawings, and other documents stored in a repository.  
The View component supports Windows 10.
  - WebView  
WebView is a web-based View application which can be installed on any supported application server. The advantage of using WebView over the View application is that the user need not install the View application on every client computer and the documents reports are rendered in the browser window.  
Unlike View, WebView supports Linux-based operating systems also. WebView also includes the Daeja ViewONE Viewer plug-in which enables users to open TIFF and PDF documents inside the browser window and provides tools to annotate documents.
  - Manage  
Manage enables to release OpenText Documentum CM documents to SAP, and to maintain those released documents.

For more information about specific Operating System versions and supported software environments, see product *Release Notes*.

## 1.4 Supported SAP document formats

OpenText Documentum CM supports the following SAP document classes or formats:

- Incoming or scanned documents (FAX class, TIFF format)
- Outgoing documents (OTF class, PDF)
- Archived data (REO class, REO format)
- Reports or print lists (ALF class, ALF format)

## 1.5 SAP and Documentum Content Services for SAP Solutions terminology

The following table presents the SAP and Documentum Content Services for SAP Solutions terminology and their definitions used in this guide.

**Table 1-1: Terminology and definitions**

Term	Definition
CS SAP	Product that connects OpenText Documentum CM to and from SAP.
ArchiveLink	Cross-functional interface that is part of the SAP Basis System. ArchiveLink handles the storage and retrieval of documents and data to and from a repository external to SAP.
WebAdmin	An administrative console that allows you to perform the following tasks: <ul style="list-style-type: none"> <li>• Archiving services:               <ul style="list-style-type: none"> <li>– Create, configure, and manage archives.</li> <li>– Manage certificates for the archive.</li> <li>– Configure document archival for Documentum Content Services for SAP Solutions.</li> </ul> </li> <li>• DMS-related services:               <ul style="list-style-type: none"> <li>– Configure batch jobs for linking and replication tasks.</li> <li>– Schedule and manage the execution of linking and replication jobs.</li> </ul> </li> </ul>

<b>Term</b>	<b>Definition</b>
HVPS	A server component that allows you to automate the linking between SAP objects and documents, as well as maintain those links. This automation improves productivity, information integrity, and information availability. HVPS is a Java-based component.
SAP DMS	Document Management System that is part of the SAP Basis System. Presents a logical layer to integrate with external systems like AutoCAD or OpenText Documentum CM. SAP DMS is not directly related to ArchiveLink.
SAP PLM	Product Lifecycle Management (PLM). SAP PLM provides an integrated environment that ensures all personnel involved in product development, manufacturing, and service have quick and secure access to current information. It provides a set of BAPI calls that can be used by external systems like OpenText Documentum CM.
SAP Master Record	A set of master data, such as customer or vendor data, which is used in the creation of SAP documents.
SAP GUI	SAP graphical user interface. Graphical menu/screen tool that connects a client to the SAP server.
Original document	<p>Paper-based version of a document.</p> <p>For example, an invoice can consist of two sheets of paper received from a supplier. Paper documents are scanned in and stored as electronic documents in OpenText Documentum CM.</p>
SAP document	An electronic transactional record of header data and line items in SAP.

## Chapter 2

# Working with the View component

Non-SAP users can view SAP documents using the View component. This component also provides you with the ability to define your preferences for the application to be used to open the different document formats.

You can perform the following tasks using the View component:

## 2.1 Viewing documents

### To view documents with the View component:

1. Start the View component. On the start menu, click **Programs > Documentum Content Services for SAP Solutions > View**.

The application starts and the **View** window opens.

To retrieve documents, you must open a DRL.

2. Select **Open DRL** from the **File** menu.



**Note:** The View component remembers the last DRL opened and displays it in the **Open** box.

The **Open DRL** dialog box opens.

3. If required, type a valid DRL in the dialog box and select **Debug DRL**.



**Note:** Debug DRL only takes effect when you open a canned query DRL, showing the final DQL statement. For more information about DRLs, see “[Valid DRLs](#)” on page 12.

4. Click **Open**.

If you are not already connected to a repository, the **Connect to Documentum** window opens.

5. Choose the repository from the list box.

6. Select **Use Windows Login** or type your username and password.

7. Type the Domain details in the Domain box, if required.

8. Click **Connect**.

The **View component** screen lists all documents retrieved by the DRL. If only one document was retrieved, the View component starts the appropriate application and displays the document.

The view shows the folder structure (including queries and virtual documents) of the documents in the repository.

9. Navigate to the folder that contains the required document.
10. Double-click the document.

The document is opened in the preferred application. For more information about changing the preferred application for viewing by changing your format preferences, see “[Setting format preferences](#)” on page 13.

Instead of double-clicking the document, right-click to display the context menu.

You can view or print the document. In addition, you can set the preferred application for all documents with the same format as the currently selected one.



**Note:** If you select multiple documents (**Ctrl** or **Shift**), you can only print the selected documents.

### 2.1.1 Exit or Exit and Log Off

When DmView is executed, and you log off the desktop or shut down the computer, the following error message appears occasionally:

An outgoing call cannot be made since the application is dispatching an input synchronous call

This message appears because the `dmapi.exe` process is still running. There is a new menu option on the **DmView File** menu called **Exit & Log Off**. On selecting the **Exit & Log Off** menu option, the **DmView Exit & Log Off** dialog box appears.

Clicking **Yes** causes DmView to stop the `dmapi.exe` process before exiting, allowing the user to log off from the desktop, or shut down the computer, without getting the error message. The **DmView Exit & Log Off** dialog box does not open if the user clicks **File > Exit**, or clicks **X** in the top right corner of the DmView window, and the `dmapi.exe` process will not be stopped.

### 2.1.2 Valid DRLs

A DRL is like a URL, specifies a document that should be retrieved. If the document is a folder or a cabinet, a virtual document or a query, multiple documents can be retrieved. The view component then displays an outline view of the retrieved documents.

A valid DRL can have the following formats:

- `<repository name>:rel,<rel id>`
- `<repository name>:id,<id>[,<format>]`
- `<repository name> :cid,<chronicleid> ,<version label>[,<format>]`
- `<repository name>:dql,<type> where <DQL qualification>[,<format>]`
- `<repository>:<id>`

### 2.1.2.1 Sample DRLs

```
foo1:rel,37001edc80000ac6
```

This example references a document in the repository 'foo1' with the relation object ID '37001edc80000ac6'.

```
foo1:id,09001edc80000cc3
```

This example references a document in the repository 'foo1' with the object ID '09001edc80000cc3'. The primary content is retrieved.

```
foo1:id,09001edc80000cc3, pdf
```

This example references a document in the repository 'foo1' with the object ID '09001edc80000cc3'. The Acrobat PDF rendition is retrieved.

```
foo1:cid,09001edc80000ab2,CURRENT, pdf
```

This example references the current version of a document in the repository 'foo1' with the chronicle ID '09001edc80000ab2'. The Acrobat PDF rendition is retrieved.

```
foo1:dql,sop_document  
where sop_number='4711'
```

This example references a document of type 'sop\_document' in the repository 'foo1' with an attribute 'sop\_number' that is '4711'.

```
Foo1:dql,dm_cabinet
```

This example retrieves all cabinets of the repository foo1 and thereby enabling the user to browse the entire repository.

```
test3:/DCTM373507BB80000101
```

This is used by all links created by Content Services for SAP Solutions components. The old DRL schema is still supported.

## 2.2 Setting format preferences

Format preferences define the application program that will be opened when you double-click a document. Different applications identify files created by them by adding a three-character extension to the filename. Microsoft Word, for example, appends the filename with . doc, Acrobat uses . pdf. Windows automatically defines most of these and they may never need to be changed.

When the View component was installed, your format preferences may have been set according to local requirements. If this is the case, you should change preferences only after consulting your administrator.

### To change format preferences:

1. Start the **View** component. The default location is on the **Start** menu under **Programs > Content Services for SAP Solutions Client**.

The application is opened and the **View component** window opens.

2. Click **Preferences** on the **Edit** menu.

If you are not already connected to a repository, the **Connect to Documentum** window opens.

3. Choose the repository from the list box.

4. Select **Use Windows Login** or type your username and password.

5. If required, type the Domain.

6. Click **Connect**.

The **Documentum Content Services View Format Preferences** dialog box opens.

7. Choose a format for which you want to set preferences from the **Content Format** list box.

The radio buttons available in the **View Content With** dialog box will depend on the selected format.



### Notes

- Most file types will launch the associated Windows application.
- Any file may also be viewed or edited by starting the Webtop application through Internet Explorer.
- Any file may also be viewed or edited by starting the WebView application through Internet Explorer.
- The **DmView** option is only available for the special formats of Folders and Cabinets.

8. Click **Apply**.

9. Configure another content format or click **Close**.

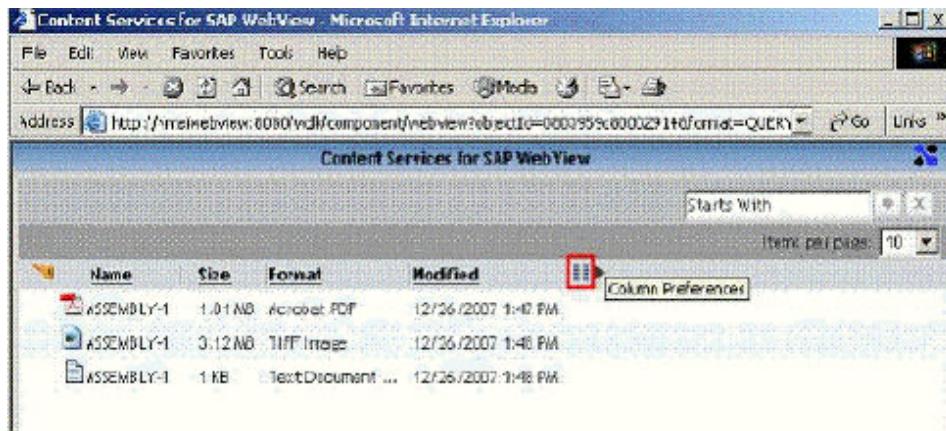
The next time the View component opens a document of a configured content format, it will use the appropriate application to display the content of the document.

## 2.3 Modifying WebView view column display

When a list of documents or other objects is initially displayed in WebView, a default set of columns is displayed. This default display can be modified using Columns Preferences.

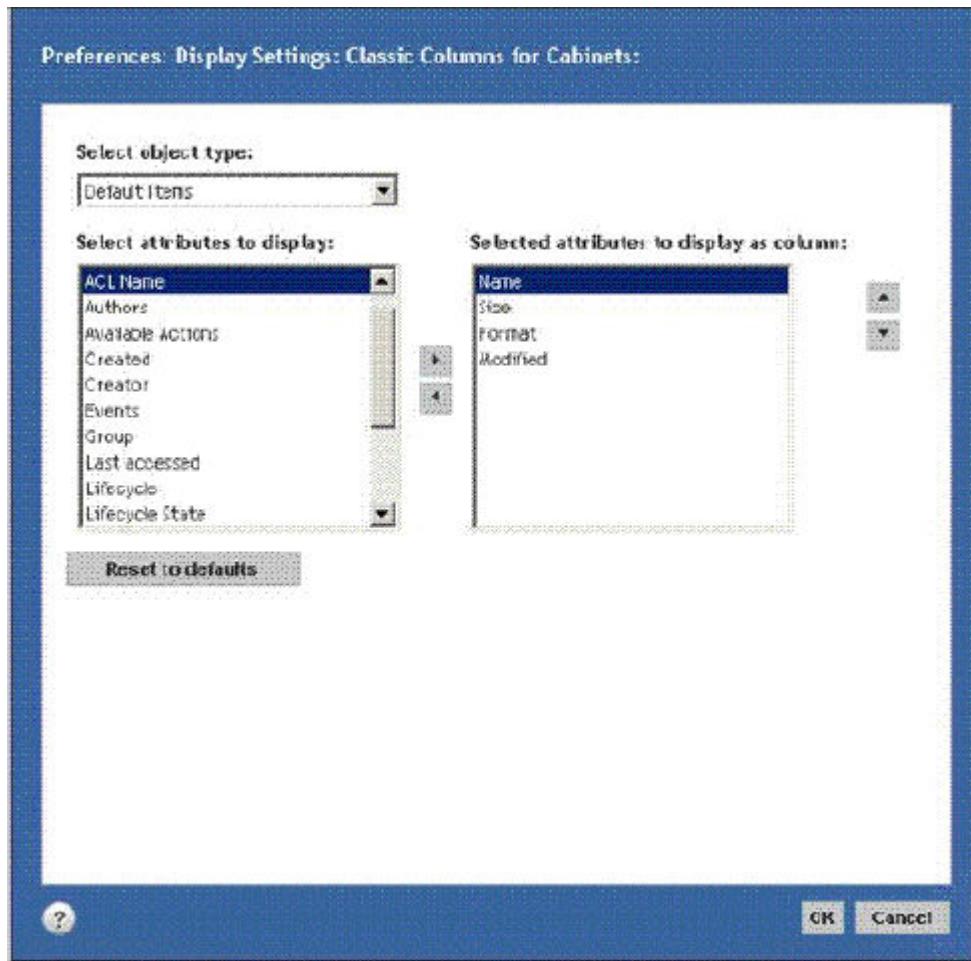
### To modify column preferences:

1. Start the **View** component. The default location is on the **Start** menu under **Programs > Documentum Content Services for SAP Solutions > View**.  
The application is started and the **View component** window opens.
2. With the desired view active, click **Column Preferences**.



The **Preferences Display Setting** window opens.

3. Choose the object type from the **Select Object type:** list box.  
Choose the desired attributes from the **Select attributes to display:** list using the left and right arrows to move the attributes to and from the **Selected attributes to display as column:** list box.  
Use the up and down arrows to define the order. The selected attributes will appear in the desired view window.



**Note:** If a view contains objects with a specific list of attributes, only those attributes will be shown. In this case, the **Column Preferences** button will not appear.

## 2.4 Annotating PDF documents

If a document or document rendition is stored as a PDF, and Adobe Acrobat Exchange is installed on your personal computer, you can annotate the document.

Annotations, which are also called notes, look like yellow sticky notes attached to a paper document. Annotations allow you to comment on a document without making changes, while allowing others to see your comments. You can edit, delete, and move your annotations. In addition to installing Acrobat, the OpenText Documentum CM Annotation plug-in must be installed. The Content Services installation program installs the OpenText Documentum CM Annotation plug-in.

Your ability to annotate documents depends upon the permissions that you have on the underlying document (RELATE permission is required to annotate documents).

**To annotate a document:**

1. In Acrobat Exchange, select **Tools > Note**.
2. Click where you want the annotation to appear.
3. Type the annotation in the Note window. For more information about creating and using annotations, see the *Adobe Acrobat documentation*.
4. Select **File > Save**.
5. Select a permission to apply to your annotation.

When you create an annotation, you can assign it default or private permissions:

- Default: Enables other users with at least Read permission for your annotations, to view your annotations. The collection of annotations you attach to a document have assigned permission levels.
  - Private: Blocks other users from viewing your annotations.
6. If you want the annotations to be associated with future versions of the document, check **Keep Annotations With Future Versions**. By default, your annotations are associated only with the current version.
  7. Click **Save**.

The annotations are now stored in the OpenText™ Documentum™ Content Management Server.

## 2.5 Using the Daeja Image Viewer

WebView also supports the Daeja Image Viewer as an alternative to using Adobe Exchange as a document viewing and annotating tool.

The *OpenText Documentum Content Services for SAP Solutions - Installation Guide (EDCCOSAPCS250200-IGD)* has information for installing and configuring the Daeja image Viewer to work with Documentum Content Services for SAP Solutions.

The Daeja website has information about using the viewer online.



# **Appendix A. Configuration and usability notes**

## **A.1 Webtop integration – view preferences**

Virtual documents and DmQueries are not supported in the Webtop integration. The View preferences do not include Content Formats for virtual document and DmQuery. Virtual documents and DmQuery results are always displayed in the DmView list view, regardless of the setting in Webtop preferences.

## **A.2 Passing localized DIRs**

You can only pass English Document Info Records (DIRs) between Content Services for SAP Solutions and SAP R/3. All the other language DIRs are ignored.

## **A.3 Content Services for SAP Solutions client installed only with WebView URL, information not saved**

Set the WebView URL, only after the installation of the Content Services for SAP Solutions client, using **Edit > Preferences** for the required format.

## **A.4 Execution of SAP queries created in 5.3 SPx, 6.0, or 6.0 SP1 with ObectId as parameter, fails when upgraded to 6.5**

Make sure that the ObjectId parameter is used instead of ObectId if you are making use of any of the following objects:

- Archive data
- Financial document
- Personnel links
- Personnel master
- Purchasing document

## A.5 OpenText Documentum CM link job does not work when activity and job names contain Korean or Brazilian Portuguese or any multi-byte accented characters

The OpenText Documentum CM link does not work in WebAdmin when the activity and job names contain Korean or Brazilian Portuguese or any multi-byte accented characters.

To resolve this issue, do not use Brazilian Portuguese accented characters in activity and job names, or if accented characters are required, ensure that the Operating System code page and default client code page of the OpenText Documentum Content Management (CM) Server are set to ISO\_8859-1.

## A.6 Agent > SAP > Query > Archive data

In Content Services for SAP Solutions WebAdmin, the SAP Query Type *Archive data* no longer works in SAP 4.6c and 4.7 due to a change in the SAP Data Archiving tables.

## A.7 SAP 4.7 > Agent > Action > Link Documentum > Image Assign SAP Workflow

When an RFC Content Repository (archive ID) is used to link incoming documents to SAP workflow using Image Assign SAP Workflow, an SAP workflow is created but the linked document cannot be displayed. A workaround is to use an HTTP Content Repository (archive ID) with this action.

## A.8 SAP 4.7 > Agent > Action > Check Document Info Records

Sometimes, DIRs in SAP might be missing matching objects in the repository. In these cases, the **Check Document Info Records** action does not return the DIR number of these DIRs. Therefore, it is not possible to identify the cause of the discrepancies.

## A.9 WebView help not available in Korean and Brazilian Portuguese

WebView help is displayed in English for the Korean version and Brazilian Portuguese version of Content Services for SAP Solutions. This does not affect the product functionality.

## A.10 HVP Worker URL format

When performing HVP Worker creation or modification, the URL format to use is:

`http://<host>:<port>/HvpWorker/hvpCommand/ OR http://<host>:<port>/HvpWorker/hvpCommand`

## A.11 Windows TIFF viewer on Windows XP and Windows 2003

View and Capture have a built-in TIFF viewer for viewing documents of type TIFF/TIF documents. This built-in viewer uses libraries and controls shipped by Microsoft. After Windows 2000, Microsoft discontinued shipping these libraries and controls with the standard operating system. The built-in TIFF viewer can no longer be supported on Windows XP, Windows 2003, and beyond. On newer versions of the Windows operating systems, the default Windows TIFF viewer will be used.

When Content Services for SAP Solutions Client is installed on Windows XP or 2003, the default preference for **TIFF Image** in the **View** client is set to **Associated Windows Application**.

The preference **Content Services for SAP Solutions TIFF Viewer** is disabled. You will still be able to select **Other Application** if you are using some other TIFF viewer. In addition, you will be able to choose **View using Webtop** which will open the TIFF image using the Associated Windows Application, and will also launch Webtop in the background with the location of the TIFF image displayed. The preferences configured in View will also be used by Capture to display tiff/tif documents.

## A.12 Content Services for SAP Solutions TIFF viewer on Windows 2000 and earlier

When Content Services for SAP Solutions Client is installed on Windows 2000 and earlier versions, the default preference for **TIFF Image** in the **View** client will continue to be set to **Content Services for SAP Solutions TIFF Viewer**. You will have the option of changing the TIFF viewer to **Associated Windows Application**, **Other Application**, or **View using Webtop**. The preferences configured in **View** will also be used by Capture to display TIFF/TIF documents.

When using Capture in operating system versions Windows XP, 2003, or later, if you open an additional TIFF document from the Windows TIFF viewer window after Capture has already launched a document, the newly opened document will not be saved to the repository. Capture will try to save the initially opened document. Capture does not have any knowledge of documents being opened by the Windows TIFF viewer.