opentext™

OpenText™ Documentum™ Content Management

Content Aviator Admin Console Guide

Configure OpenText™ Content Aviator in Admin Console.

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Chapter 1

Overview

OpenText Content Aviator is an intelligent assistant that allows you to summarize or ask natural language questions about content in your OpenText Documentum Content Management (CM) repositories.

In Admin Console, administrators turn Content Aviator on and designate folders or virtual documents as *Aviator assignments* to enable them for Content Aviator in Smart View. Sub-folders of designated folders are automatically enabled by the system as are all children of a designated virtual document, including other virtual documents.

In Smart View, users can open an interactive chat panel and initiate natural language conversations to get information about these folders and virtual documents and their contents. Users can ask questions in a number of supported languages, and Content Aviator responds using the same language.

> **Note:** Your search data is protected and will not be used to train our AI models.

Content supported by Content Aviator

When a folder or virtual document is designated as an Aviator assignment, users can ask questions about its contents. Users can also ask Content Aviator to summarize content.

Content Aviator supports content when the following conditions are met:

- Content is in a folder or virtual document designated as an Aviator assignment.
- The user has permission to access the content.
- Content has a native format with searchable text (full-text indexable). Renditions are not supported.
- An administrator has assigned a Content Aviator license to the user.

When Content Aviator is available

Content Aviator is available in Smart View when each of the following is completed:

1. An administrator has turned Content Aviator on in Admin Console and designated one or more folders or virtual documents as Aviator assignments. See section 2 "Configure Content Aviator" in *OpenText Documentum Content Management - Content Aviator Administration Help (EDCADC-H-AAV)*.

2. An administrator has configured client configuration to activate Content Aviator chat in Smart View. See section 23.1.1 "Ensuring that Content Aviator chat is

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available to users" in *OpenText Documentum Content Management - Client Configuration Help (EDCCL-H-AGD)*.

3. The user has the required permissions to access an Aviator assignment folder or virtual document and its contents:

    • Browse permission on the folder or virtual document.

    • Read permission on the contents in the folder or virtual document.

4. An administrator has assigned a Content Aviator license to the user.

Chapter 2

Configure Content Aviator

Configure and set up the environment for Content Aviator chat in Smart View by following these procedures:

1. Turn Content Aviator on in Admin Console

2. Make Aviator assignments in Admin Console

3. Configure Content Aviator in client configuration. See section 23.1 "Configuring Content Aviator in client configuration" in *OpenText Documentum Content Management - Client Configuration Help (EDCCL-H-AGD)*.

2.1 Turn Content Aviator on

1. Sign in to Admin Console with the proper access rights.

2. On the **Home** page, click the **Modules** tile, and then click the Content Aviator tile.

   The **Aviator configuration** page opens.

3. To turn Content Aviator on, on the **Aviator** tab, do the following:

   a. Select the **Enable Aviator** check box.

   b. In the **Disclaimer** panel that opens, carefully read the disclaimers and warnings. To accept the terms, click **Accept**.

   You cannot turn Content Aviator on if you do not accept the terms. After accepting the terms, you can view them at any time by clicking **Show terms**.

   c. Click **Save** at top of the page.

   d. In the **Summary** dialog box, click **Save** to confirm.

   📄 **Note:** You can turn Content Aviator off at any time by clearing the **Enable Aviator** check box and clicking **Save** at the top of the page. Click **Save** in the **Summary** dialog box to confirm.

   ❗ **Important**

   If you turn Content Aviator off, any folders or virtual documents you have designated as Aviator assignments as well as their contents are no longer enabled for Content Aviator (see "Make Aviator assignments" on page 8).

   If you turn Content Aviator back on, you need to remove these Aviator assignments (see Remove designated folders and Remove designated virtual documents) and re-designate them to enable the folders and virtual documents again.

4.   Follow the instructions in "Make Aviator assignments" on page 8.

2.2   Make Aviator assignments

You can designate both folders and virtual documents as Aviator assignments, but you can make only one type of assignment at a time.

Note: To understand how folders and virtual documents enabled for Content Aviator behave under different scenarios, see "Content Aviator enablement behavior" on page 15.

2.2.1   Designate folders

Designate folders as Aviator assignments:

1.   Ensure that you have turned Content Aviator on (see "Turn Content Aviator on" on page 7).

2.   Select the **Assignments** tab.

3.   Select **Folder** in the **Aviator Assignments** list and then click **Add** ╋.

     You might need to refresh the table to activate the list.

4.   In the **Folder browser** dialog box, select the folders, drilling down as needed.

     Tip: You can search folders by **Name**, sort by **Name** in ascending or descending order, resize columns, browse through the folder structure using the breadcrumb trail above the table, and access additional actions by pointing to a header and clicking **More actions** ⌄.

     Notes

     - When you designate a folder, its sub-folders are automatically enabled by the system.

     - Any folders that are already designated are highlighted in blue in the **Folder browser** dialog box and their check boxes are selected. These folders are read-only and you cannot drill down on them because any sub-folders are also enabled. You cannot remove these assignments by clearing their check boxes. For help on removing them, see Remove designated folders.

5.   When you are finished, click **Add**.

     The designated folders appear in the **Aviator Assignments** table and are highlighted in green until they are saved.

     Notes

     - The **Aviator Assignments** list is deactivated until you save your assignments and refresh the table. You cannot designate virtual

documents as Aviator assignments until your folder assignments are saved.

- You can continue to designate more folders before saving by clicking **Add** ✛ again.

- If you designate a folder with one or more sub-folders that are already designated, the parent is added to the **Aviator Assignments** table and the sub-folders are removed but remain enabled.

6. Click **Save** at the top of the page.

7. In the **Summary** dialog box, click **Save** to confirm.

   The **Summary** dialog box displays a list of all the folders you designated as Aviator assignments before saving

   After saving, the **Aviator Assignments** list is reactivated. You might need to refresh the table ↻ for all changes to be reflected.

> ❗ **Important**
>
> If at the time you designate a folder a document in the folder has older versions, only the current version and subsequent versions of the document are enabled for Content Aviator.

View designated folders:

1. Select **Folder** in the **Aviator Assignments** list.

   You might need to refresh the table to activate the list.

2. In the folders table, do any of the following:

   - To search by **Name**, click **Search by Name** 🔍 and start typing your search term. Results are returned as you type. To cancel the search, click **Close search** ✕.

   - To sort by **Name**, click **Sort ascending** �僅↑ or **Sort descending** ⇩↓.

   - To resize columns, point to the column divider and drag the arrows.

   - To access other actions, such as sorting on a column, click **More actions** ⌄.

   - To go to the folder's location in Smart View, point to the folder and click **Locate in Smart View** ↗ (availability depends on your configuration).

   - To refresh the table, click **Refresh** ↻.

Remove designated folders:

1. Select **Folder** in the **Aviator Assignments** list.

   You might need to refresh the table to activate the list.

2. In the **Aviator Assignments** table, select the folders you no longer want designated as Aviator assignments:

- To remove a single folder, point to its **Name** and click **Remove** ⬝.

- To remove multiple folders, select the folders and click **Remove** on the **Action menu** above the table.

  📄 **Notes**

  - When you remove a folder, the folder and all its sub-folders are no longer enabled, except for sub-folders that were explicitly enabled by an administrator.

  - If you remove a folder but want one or more of its sub-folders to remain enabled, you must re-designate each individual sub-folder to re-enable it.

  - If you remove a folder but change your mind before saving, you can click **Reset** at the top of the page to restore the folder to the table.

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

4. In the **Summary** dialog box, click **Save** to confirm.

   The **Summary** dialog box displays a list of the folders you removed in step 2.

   After saving, the **Aviator Assignments** list is reactivated and removed folders no longer appear in the **Aviator Assignments** table. You might need to refresh the table ↻ for all changes to be reflected.

   💡 **Tip:** It is possible to turn Content Aviator on or off, designate folders as Aviator assignments, and remove designated folders all at once.

   When you click **Save** at the top of the page, the **Summary** dialog box displays all the added and removed assignments to allow you to review them before confirming.

2.2.2   Designate virtual documents

Designate virtual documents as Aviator assignments:

1. Ensure that you have turned Content Aviator on (see).

2. Select the **Assignments** tab.

3. Select **Virtual document** in the **Aviator Assignments** list and then click **Add** ＋.

   You might need to refresh the table to activate the list.

4. In the **Virtual documents** dialog box, select the virtual documents you want to designate as Aviator assignments.

   💡 **Tip:** You can search virtual documents by **Name** or on any other column that supports search, sort on columns in ascending or descending order,

resize columns, and access additional actions by pointing to a header and clicking **More actions** ⌄ .

> 📄 **Notes**
>
> - When you designate a virtual document, all its child components, including other virtual documents, are automatically enabled by the system.
>
> - Any virtual documents that are already designated are highlighted in blue in the **Virtual documents** dialog box and their check boxes are selected. These virtual documents are read-only. You cannot remove these assignments by clearing their check boxes. For help on removing them, see Remove designated virtual documents.

5. When you are finished, click **Add**.

    The designated virtual documents appear in the **Aviator Assignments** table and are highlighted in green until they are saved.

    > 📄 **Notes**
    >
    > - The **Aviator Assignments** list is deactivated until you save your assignments and refresh the table. You cannot designate folders as Aviator assignments until your virtual document assignments are saved.
    >
    > - You can continue to designate more virtual documents before saving by clicking **Add** + again.
    >
    > - If you designate a virtual document with one or more child virtual documents that are already designated, the parent virtual document is added to the **Aviator Assignments** table and the child virtual documents are removed from the table but remain enabled.

6. Click **Save** at the top of the page.

7. In the **Summary** dialog box, click **Save** to confirm.

    The **Summary** dialog box displays a list of all the virtual documents you designated as Aviator assignments before saving

    After saving, the **Aviator Assignments** list is reactivated. You might need to refresh the table ↻ for all changes to be reflected.

View designated virtual documents:

1. Select **Virtual document** in the **Aviator Assignments** list.

    You might need to refresh the table to activate the list.

2. In the virtual documents table, do any of the following:

- To search by **Name**, click **Search by Name** 🔍 and start typing your search term. Results are returned as you type. To cancel the search, click **Close search** ✕.

- To sort by **Name**, click **Sort ascending** ⇱↑ or **Sort descending** ⇲↓.

- To resize columns, point to the column divider and drag the arrows.

- To access other actions, such as sorting on a column, click **More actions** ⌄.

- To view the virtual document in Smart View, point to the virtual document and click **Locate in Smart View** ↱ (availability depends on your configuration).

- To refresh the table, click **Refresh** ↻.

Remove designated virtual documents:

1. Select **Virtual document** in the **Aviator Assignments** list.

    You might need to refresh the table to activate the list.

2. In the **Aviator Assignments** table, select the virtual documents you no longer want designated as Aviator assignments:

    - To remove a single virtual document, point to its **Name** and click **Remove** 🗑.

    - To remove multiple virtual documents, select them and click **Remove** on the **Action menu** above the table.

    > 📄 **Notes**
    >
    > - When you remove a virtual document, all its child components, including other virtual documents are no longer enabled, except for child virtual documents that were explicitly enabled by an administrator or that are children of another enabled virtual document.
    >
    > - If you remove a virtual document but want one or more of its child virtual documents to remain enabled, you must re-designate each child virtual document to re-enable it.
    >
    > - If you remove a virtual document but change your mind before saving, you can click **Reset** at the top of the page to restore the virtual document to the table.

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

4. In the **Summary** dialog box, click **Save** to confirm.

    The **Summary** dialog box displays a list of the virtual documents you removed in step 2.

    After saving, the **Aviator Assignments** list is reactivated and the removed virtual documents no longer appear in the **Aviator Assignments** table. You might need to refresh the table ↻ for all changes to be reflected.

Tip: It is possible to turn Content Aviator on or off, designate virtual documents as Aviator assignments, and remove designated virtual documents all at once.

When you click **Save** at the top of the page, the **Summary** dialog box displays all the added and removed assignments to allow you to review them before confirming.

Chapter 3

Content Aviator enablement behavior

This chapter describes the behavior of folders and virtual documents enabled for Content Aviator under different scenarios.

Designating folders

Scenario 1: Folder F1 is designated

- The sub-folders of folder F1 are automatically enabled by the system.

- Folder F1 is highlighted in blue in the **Folder browser** dialog box. The folder is read-only and cannot be drilled down on because there is no need to designate its sub-folders.

- Folder F1 is listed in the **Aviator Assignments** table but its sub-folders are not because it is assumed any sub-folders are also enabled.

- If folder F1 has one or more sub-folders that were already enabled, folder F1 is added to the **Aviator Assignments** table and the sub-folders are removed from the table but remain enabled.

- If a document in folder F1 has older versions, only the current version and subsequent versions of the document are enabled for Content Aviator.

Scenario 2: Folder F1 contains virtual document V1, which is not enabled. Folder F1 is designated.

- The parent document of virtual document V1 is enabled as a document. Content Aviator chat is enabled only for the document and only through folder F1 in a doclist.

- Virtual document V1 is not enabled in the **Virtual Document** view.

Removing designated folders

Scenario 1: Folder F1 is removed

- Folder F1 and all its sub-folders are no longer enabled and become selectable again in the **Folder browser** dialog box.

- To keep sub-folders enabled, each sub-folder must be re-designated to re-enable it.

Scenario 2. Folder F2 is designated by an administrator. Folder F1, the parent of folder F2, is later designated by an administrator. Folder F1 is later removed

- Folder F2 remains enabled because it was explicitly designated by an administrator.

- Folder F1 is removed from the **Aviator Assignments** table and folder F2 re-appears in the table.

Scenario 3: Folder F1 contains virtual document V1. Virtual document V1 is enabled by an administrator. Folder F1 is enabled. Folder F1 is later removed.

- Folder F1 and all its sub-folders are no longer enabled and become selectable again in the **Folder browser** dialog box.

- Virtual document V1 remains enabled because it was explicitly enabled by an administrator.

Moving enabled folders

Scenario 1: Folder F2 is enabled by an administrator. Folder F2 is later moved to a non-enabled folder G1 in a different folder hierarchy.

- Folder F2 and its sub-folders remain enabled because the folder was explicitly enabled by an administrator.

- Folder F2 continues to be listed in the **Aviator Assignments** table.

Scenario 2: Folder F2 is enabled by an administrator. Folder F1, its parent, is not enabled. Folder F2 is later moved to a folder G1 in a different folder hierarchy that was also enabled by an administrato.

- Folder F2 and its sub-folders remain enabled because the folder was explicitly enabled by an administrator and its new parent, folder G1, is enabled.

- Folder F2 is removed from the **Aviator Assignments** table because its new parent, folder G1, is enabled and already listed in the **Aviator Assignments** table.

- If folder F2 is moved back to its previous parent folder, folder F1, folder F2 and its sub-folders remain enabled, even though folder F1 is not enabled, because folder F2 was explicitly enabled by an administrator. Folder F2 re-appears in the **Aviator Assignments** table together with folder G1.

Scenario 3: Folder F2 is enabled by an administrator and folder F3, a sub-folder, is automatically enabled by the system. Folder F3 is later moved to a non-enabled folder G1 in a different folder hierarchy.

- Folder F3 and its sub-folders are no longer enabled because folder G1 is not enabled.

- Folder F2 continues to be listed in the **Aviator Assignments** table.

Scenario 4: Folder F2 is enabled by an administrator and folder F3, a sub-folder, is automatically enabled by the system. Folder F3 is later moved to a folder G1 in a different folder hiearchy that was also enabled by an administrator.

- Folder F3 and its sub-folders remain enabled because folder G1 is enabled.

- Folder F2 continues to be listed in the **Aviator Assignments** table.

Linking enabled folders

Scenario 1: Folder F2 is enabled by an administrator and is later linked to a non-enabled folder G1 in a different folder hierarchy.

- Folder F2 is linked to folder F1 and folder G1.

- Folder F2 and its sub-folders remain enabled because the folder was explicitly enabled by an administrator.

- Folder F2 continues to be listed in the **Aviator Assignments** table.

Scenario 2: Folder F2 is enabled by an administrator and is later linked to an enabled folder G1 in a different folder hierarchy.

- Folder F2 is linked to folder F1 and folder G1.

- Folder F2 and its sub-folders remain enabled because the folder was explicitly enabled by an administrator and the new linked parent, folder G1, is enabled.

- Folder F2 is removed from the **Aviator Assignments** table because the new linked parent, folder G1, is enabled and appears in the **Aviator Assignments** table.

Scenario 3: Folder F2 is enabled by an administrator and folder F3, a sub-folder, is automatically enabled by the system. Folder F3 is later linked to a non-enabled folder G1 in a different folder hierarchy.

- Folder F3 is linked to folder F2 and folder G1.

- Folder F3 and its sub-folders remain enabled because the link to folder F2 is retained and folder F2 was explicitly enabled by an administrator.

- Folder F2 continues to be listed in the **Aviator Assignments** table because the folder hierarchy has not been affected.

Scenario 4: Folder F2 is enabled by an administrator and folder F3, a sub-folder, is automatically enabled by the system. Folder F3 is later linked to an enabled folder G1 in a different folder hierarchy.

- Folder F3 is linked to folder F2 and folder G1.

- Folder F3 and its sub-folders remain enabled because the link to folder F2 is retained and folder F2 was explicitly enabled by an administrator, and because the new linked parent, folder G1, is enabled.

- Folder F2 continues to be listed in the **Aviator Assignments** table because the hierarchy has not been affected.

Copying enabled folders

Scenario 1: Folder F2 is enabled by an administrator and is later copied to a non-enabled folder G1 in a different folder hierarchy.

- Source folder F2 and its sub-folders remain enabled because the folder was explicitly enabled by an administrator.

- Copied folder F2 and its sub-folders are not enabled because the folder's new parent, folder G1, is not enabled.

- Source folder F2 continues to be listed in the **Aviator Assignments** table because the folder hierarchy has not been affected.

Scenario 2: Folder F2 is enabled by an administrator and is later copied to an enabled folder G1 in a different folder hierarchy.

- Source folder F2 and its sub-folders remain enabled because the folder was explicitly enabled by an administrator.

- Copied folder F2 and its sub-folders are enabled because the folder's new parent, folder G1, is enabled.

- Source folder F2 and folder G1 continue to be listed in the **Aviator Assignments** table.

Scenario 3: Folder F2 is enabled by an administrator and folder F3, a sub-folder, is automatically enabled by the system. Folder F3 is later copied to a non-enabled folder G1 in a different folder hierarchy

- Folder F2 and its sub-folders, including source folder F3, remain enabled because folder F2 was explicitly enabled by an administrator and the folder hierarchy has not been affected.

- Copied folder F3 and its sub-folders are not enabled because the folder's new parent, folder G1, is not enabled.

- Folder F2 continues to be listed in the **Aviator Assignments** table because the folder hierarchy has not been affected.

Scenario 4: Folder F2 is enabled by an administrator and folder F3, a sub-folder, is automatically enabled by the system. Folder F3 is later copied to an enabled folder G1 in a different folder hierarchy.

- Folder F2 and its sub-folders, including source folder F3, remain enabled because folder F2 was explicitly enabled by an administrator and the folder hierarchy has not been affected.

- Copied folder F3 and its sub-folders are enabled because the folder's new parent, folder G1, is enabled.

- Folder F2 and folder G1 continue to be listed in the **Aviator Assignments** table.

Designating virtual documents

Scenario 1: Virtual document V1 is designated

- The child virtual documents of virtual document V1 are automatically enabled by the system.

- Virtual document V1 is highlighted in blue in the **Virtual documents** dialog box. The virtual document is read-only.

- Virtual document V1 is listed in the **Aviator Assignments** table but its child virtual documents are not because it is assumed any children are also enabled.

- If virtual document V1 has one or more child virtual documents that were already designated, virtual document V1 is listed in the **Aviator Assignments** table and child virtual documents are removed but remain enabled.

- The parent document of virtual document V1 becomes enabled as a document through its folder location in a doclist.

Removing designated virtual documents

Scenario 1: Virtual document V1 is removed

- Virtual document V1 and its child virtual documents stop being enabled.

- Virtual document V1 is removed from the **Aviator Assignments** table and becomes selectable again in the **Virtual documents** dialog box.

- To keep child virtual documents enabled, each child must be re-designated to re-enable it.

Scenario 2. Virtual document V2 is designated by an administrator. Virtual document V1, the parent of virtual document V2, is later designated by an administrator. Virtual document V1 is later removed.

- Virtual document V2 remains enabled because it was explicitly designated by an administrator.

- Virtual document V1 is removed from the **Aviator Assignments** table and becomes selectable again in the **Virtual documents** dialog box. Virtual document V2 re-appears in the table.

Scenario 3: Virtual document V2 is a child of virtual document V1 and virtual document W1. Virtual document W1 is enabled. Virtual document V1 is later designated by an administrator. Virtual document W1 is later removed.

- Virtual document V2 remains enabled because its other parent, virtual document V1, is enabled.

- Virtual document V1 remains in the **Aviator Assignments** table.

- Virtual document W1 is removed from the **Aviator Assignments** table and becomes selectable again in the **Virtual documents** dialog box.