

OpenText™ Documentum™ Content Management for SAP® Solutions

Business Scenarios Business Administration Guide

As a business administrator, set up and use Business Scenarios. Business Scenarios are turnkey solutions that are a part of OpenText Documentum CM for SAP Solutions. They are pre-configured for different business processes.

EESPDC250400-SCG-EN-1

**OpenText™ Documentum™ Content Management for SAP® Solutions
Business Scenarios Business Administration Guide**

EESPD250400-SCG-EN-1

Rev.: 2025-Nov-19

This documentation has been created for OpenText™ Documentum™ Content Management 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.

Open Text Corporation

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

Tel: +1-519-888-7111

Toll Free Canada/USA: 1-800-499-6544 International: +800-4996-5440

Fax: +1-519-888-0677

Support: <https://support.opentext.com>

For more information, visit <https://www.opentext.com>

© 2025 Open Text

Patents may cover this product, see <https://www.opentext.com/patents>.

Disclaimer

No Warranties and Limitation of Liability

Every effort has been made to ensure the accuracy of the features and techniques presented in this publication. However, Open Text Corporation and its affiliates accept no responsibility and offer no warranty whether expressed or implied, for the accuracy of this publication.

Table of Contents

1	Introduction	5
2	Understanding Business Scenarios	7
2.1	Purpose of Business Scenarios	7
2.2	Structure and elements of a Business Scenario	7
2.2.1	Departmental page	8
2.2.2	Business workspaces	8
2.2.3	Business workspace templates	8
2.2.4	Business object types	9
2.2.5	Categories	9
2.2.6	Documentum Permissions	9
2.2.7	WebReports and Live Reports	10
2.2.8	Facets and Custom columns	10
2.2.9	Integration to SAP S/4HANA application	10
2.2.10	Location of configuration objects	11
2.3	Getting started: deploying and connecting business scenarios	12
2.3.1	Obtaining the business scenario transport packages	12
2.3.2	Importing and deploying transport packages for Business Scenarios ..	12
2.3.3	Connecting to business application/sample app	14
2.3.4	Users and groups	15
2.3.5	Providing access to the Departmental page	15
2.4	Try out Business Scenarios	16
2.4.1	Create business workspaces	16
2.4.2	View and manage metadata	17
2.4.3	View and manage relationships	18
2.4.4	Find business workspaces	18
2.4.5	Open the business object in the business application	19
2.4.6	Open business workspace from the business application	19
3	Enterprise Asset Management	21
3.1	Business Processes	21
3.1.1	Departmental page	21
3.1.2	Team Roles	23
3.1.3	Equipment	23
3.1.3.1	Equipment workspace perspective	23
3.1.3.2	Related business workspaces	24
3.1.3.3	Notable details of the Equipment workspace	25
3.1.4	Functional Location	26
3.1.4.1	Functional Location workspace perspective	26
3.1.4.2	Related business workspaces	27
3.1.4.3	Notable details of the Functional Location workspace	28

3.1.5	Maintenance Orders	29
3.1.5.1	Maintenance Order workspace perspective	29
3.1.5.2	Related business workspaces	30
3.1.5.3	Notable details of the Maintenance Order workspace	31
3.1.6	Maintenance Notifications	32
3.1.6.1	Maintenance Notification workspace perspective	32
3.1.6.2	Related business workspaces	33
3.1.6.3	Notable details of the Maintenance Notification workspace	34
3.1.7	Materials	35
3.1.7.1	Material workspace perspective	35
3.1.7.2	Related business workspaces	35
3.1.7.3	Notable details of the Material workspace	36
3.1.8	Task Lists	37
3.1.8.1	Task List workspace perspective	37
3.1.8.2	Related business workspaces	38
3.1.8.3	Notable details of the Task List workspace	39
3.2	Technical details	40
3.2.1	Involved components	40
3.2.2	Deploy transport files	40
3.2.3	Grant business administrator access	40
3.2.4	Add users to groups	41
3.2.5	Sample application data for Enterprise Asset Management	41
3.2.6	Configure business object declarations	42
3.2.7	Configure synchronization between SAP S/4HANA and OpenText Content Management	44
3.2.7.1	Configure Create events	44
3.2.7.2	Configure Change events	45
3.2.7.3	Configure Change document events	45
3.2.8	Activate Fiori Apps	46
3.2.9	Enable UI integration in SAP Fiori apps	46
3.3	Customizing Documentum	48
4	Adapting business scenarios to your needs	49
4.1	Configuring your business scenario	49
4.2	Customizing property providers	50
4.2.1	Customizing basic settings by business scenario	50

Chapter 1

Introduction

Business scenarios are predeployed solutions for specific business processes that run stand-alone in OpenText Documentum CM for SAP Solutions or support processes in a business application like SAP S/4HANA. Business Scenarios are part of OpenText Documentum CM for SAP Solutions on premises and private cloud. On your private cloud instance, all Business Scenarios available at the time you got your tenant are predeployed and ready to use.

The following Business Scenario is available:

- **Enterprise Asset Management (only with SAP)** – supports maintenance processes in SAP S/4HANA like to build up a technical object file or to maintain technical objects.

With every OpenText Documentum CM for SAP Solutions version, a new version of business scenarios is shipped that shows how to make use of new features.

Chapter 2

Understanding Business Scenarios

2.1 Purpose of Business Scenarios

Business scenarios are best-practice configurations and implementations:

- They are ready to use solutions for business processes that you can adapt to your business requirements.
- They reduce the effort required to implement OpenText Documentum CM for SAP Solutions.
- They demonstrate the different capabilities of OpenText Documentum CM for SAP Solutions. Without much configuration effort, you can test features that you have not used yet.
- They provide a quick start for new customers.

2.2 Structure and elements of a Business Scenario

All business scenarios have a common structure and configuration elements. For example, all business scenarios have a Departmental page, which is the entry point to the business scenario. The folder structure and naming of objects follows a pattern that makes it easy to associate objects to a business scenario.

For each business scenario, the following configuration objects are provided as part of the solution:

- Departmental page as the entry point to each scenario.
- Business workspace templates containing a pre-configured folder structure, categories, and team roles.
- Perspectives for the Departmental page and the business workspaces.
- Users and groups for the access to a business scenario.

2.2.1 Departmental page

Each business scenario has a home page called the *Departmental page* as a starting point. The perspectives for the Departmental pages have been pre-configured. The Departmental pages are described in detail in the respective section for each business scenario.

On each Departmental page, you can find the following:

- **About <your business scenario> tile** – explains the most important concepts of the business scenario.
- **Workspaces tiles** – list the business workspaces associated with the business scenario.
- **WebReport tiles** – display analytic data related to the business workspaces associated with the business scenario.

2.2.2 Business workspaces

The central element of a business scenario is the business workspace. There are workspace types for all relevant business objects.

All business scenarios are designed to co-exist on one system or even interact seamlessly. This requires that some business workspaces are used in several business scenarios.

Workspace types

The business scenario workspace types have the prefix OT:
OT<*business scenario workspace type*>.

Example: OT Business Partner
OT Contract

2.2.3 Business workspace templates

Each business workspace is based on a business workspace template containing a pre-configured folder structure, categories, and Documentum Permissions.

2.2.4 Business object types

For business scenarios that are designed to work with a business application, the business application provides the required business object types. In this case, the business scenario workspace types have business object types assigned. After deploying the business scenario, the business object types are initially configured for the sample application representing the business application until it can be connected and customized. To connect and configure your business application, follow the steps described in this documentation.

The business object type comes with a property mapping that is tightly aligned to the business workspace category attributes and an URL to open the business object in the business application.

The business scenario object types have a prefix OT:
OT<business scenario business object type>.

Example: OT Business Partner

2.2.5 Categories

Each business scenario workspace has pre-configured categories and attributes that you cannot change or remove. Especially business scenarios that are designed to work with a business application have a set of attributes which resembles the metadata provided by the business application.

Note the following:

- **Reference** attribute – in stand-alone scenarios, you can use Reference attributes to create a unique business workspace ID. See *OpenText Content Management User Help - Categories and Attributes (LLESWAT-H-UGD)*.
- **Table Key Lookup** attribute – creates a drop-down list with default values. A WebReport ensures that this list can be expanded as needed, either by manual entries or by data of the business application. As soon as a business workspace has been created with a value other than the default value, this new value will be added to the drop-down list.

2.2.6 Documentum Permissions

Documentum Permissions contain a group for each business scenario and you can add the users to these group in OTDS.

2.2.7 WebReports and Live Reports

WebReports are used, for example, to display data in charts, support data exchange in workflows. On a Departmental page, WebReport tiles are used to display information about the business scenario, display data in charts, and list shortcuts to business workspaces. For more information about WebReport widgets, see *OpenText Content Management - Widget Configuration Guide (CSAV-CWG)*.

2.2.8 Facets and Custom columns

Business scenarios make use of facets and custom columns to maximize the user experience:

- The main category attributes are provided in Facets and Custom Columns and made available at the location where the business workspaces are stored.

2.2.9 Integration to SAP S/4HANA application

For an integration in SAP S/4HANA and SAP S/4HANA private cloud, the respective business scenarios contain everything required to directly connect the SAP application. You must configure these integrations in your SAP system.

Elements of the SAP package OTCMBSC

The following elements are part of the SAP package OTCMBSC:

- Property provider and eventing to automatically create and update business workspaces with data, relationships between business objects.
- Fiori catalog to open business workspaces from within the SAP Fiori apps. This includes desktop computers, tablets, and mobile phones.



Note: The catalogs expect that OpenText Content Management and SAP Fiori Launchpad URLs run under the same origin with a reverse proxy like an SAP Web Dispatcher. In case, you do not use a reverse proxy, you must make a client specific configuration for the catalogs and use the URL parameter `UseClassicConfig`. For more details, see SDK and API documentation of Content Management for SAP Solutions 24.4 (https://support.opentext.com/csm?id=kb_article_view&sysparm_article=KB0824884).

- **BAdIs** to show OpenText Content Management documents in SAP approval processes in the SAP Fiori Inbox.
- **URLs to open business object in the SAP S/4HANA application** from the business workspace. The URL points to a Fiori app if available for the business object. Otherwise, a SAP transaction will be opened in the SAP GUI.



Note: `$BaseUrl$` – it is expected that the base URL defined in the connection to the business application and the base URL to access the SAP Fiori Launchpad are the same. If you have different URLs, you

must replace \$BaseUrl\$ with the base URL of your Fiori Launchpad portal.

- **Sample application** – In case you just want to try out the business scenario without configuring everything, a sample application S4HanaSampleApp is provided that simulates a SAP S/4HANA application.

For more information about the SAP package OTCMBSC (ABAP AddOn), see *OpenText Content Management for SAP Solutions - Installation and Upgrade Guide (ERLK-IGD)*.

UI integration into Fiori app

For the UI integration into Fiori apps we recommend using the key user adaption. In this way, the business workspaces can be directly integrated by adapting the Fiori application and providing the URL that calls the business workspace.

For more information, see SDK and API documentation of Content Management for SAP Solutions 24.4 (https://support.opentext.com/csm?id=kb_article_view&sysparm_article=KB0824884).

For the URLs to the respective business scenarios, see

Enterprise Asset Management: “**Enable UI integration in SAP Fiori apps**” on page 46.

2.2.10 Location of configuration objects

You can find the configurable objects of the business workspace at the following locations:

Configurations	Location
Perspective for departmental page	Enterprise / <Business Scenario> / <business scenario Departmental page>
Perspective	Perspectives volume / <Business Scenario> / OT <business workspace>
Workspace Template	Document Template volume / <Business Scenario> / <business workspace temp
Workspace Type	Enterprise / Business Workspaces / Workspace Types / OT <business workspa
Business Object Type	Enterprise / Enterprise Application Integration / Business Object Types / OT <business object type>
Categories	Enterprise / Business Workspaces / Categories / <Business Scenario> /
Classifications	Enterprise / Business Workspaces / Classification / Types / Workspace Type: <Business Scenario> /
Unique Names	Enterprise / Enterprise Application Integration / Unique Names / <Business Scenario> /
Smart Document Types	Enterprise / Business Workspaces / Classification / Types / Document Types <Business Scenario> /

Configurations	Location
Facets	Facets volume / <Business Scenario> / Facets /
Custom columns	Facets volume / <Business Scenario> / Custom Columns
Search forms	Enterprise / Business Workspaces / Saved Queries Volume / <business scenario>/
Workflows	Enterprise / Workspace / Administration / Workflows / <business scenario> /
WebReports and LiveReports	Enterprise / Workspace / Administration / Web Reports /<business scenario>/



Note: You can find the objects that are used across business scenarios in the common folder.

2.3 Getting started: deploying and connecting business scenarios

As Business Administrator, you can find the Business Scenarios that are already installed on your OpenText Content Management system in the following folder: **Enterprise > OpenText Business Scenarios**.

Follow the steps described in “[Importing and deploying transport packages for Business Scenarios](#)” on page 12.

2.3.1 Obtaining the business scenario transport packages

Business scenario transport packages are available on several locations:

- **CS Support Directory** – only for on-premises customers: on the server where your OpenText Content Management system is installed.

Use the following URL structure:

<installation directory>/module/xsapdcm_16_2_0/support/tranports

EAM config and EAM.dar files – These file are available in <installation directory>/module/xsapdcm_16_2_0/support/tranports/EAM.

2.3.2 Importing and deploying transport packages for Business Scenarios

For more information about using the Transport Warehouse and importing and deploying transport packages, see *OpenText Content Management - Transport User Guide (LLESTRP-UGD)*.



Note: Replace the <BusScen Name> variable with the appropriate Business Scenario name. This applies to all Business Scenarios.

Perform the following to import and deploy the transport packages:

1. **Prepare OpenText Content Management** – Run WebReports to create the Scenario Owner, the Scenario Owner group, and the Business Scenario specific

groups. For Business Scenarios that run together with SAP S/4HANA, or other business applications, a connection to a business application is created. For more information, see [“To prepare OpenText Content Management:” on page 13.](#)

2. **Deploy a Business Scenario configuration into OpenText Content Management** – Import the Business Scenario configuration which includes categories, classifications, workspaces types, workspace perspectives, business object types, and more. For more information, see [“To deploy a Business Scenario configuration:” on page 13.](#)

To prepare OpenText Content Management:

1. Sign in to OpenText Content Management as a Business Administrator, and import all transport packages into Transport Warehouse.
2. Deploy the **OpenText Business Scenario <BusScen Name> Setup.zip** transport package.
3. After deploying this package, navigate to **Enterprise Workspaces > OpenText Business Scenarios Setup** folder. You can find two WebReports named **Basic Setup** and **<BusScen Name> Setup**.

Click the **<BusScen Name> Setup** WebReport, provide the following:

- Scenario Owner Password : Password of the Scenario Owner user
 - Business Application ID : Autofilled default value
 - Smartview Public URL : OpenText Documentum CM Smartview Public URL
 - Smartview Server URL : OpenText Documentum CM Smartview Server URL
 - Repository Name : OpenText Documentum CM Repository Name
 - Resource Identifier : OpenText Documentum CM Repository Resource ID
4. Click **Run Report**

To deploy a Business Scenario configuration:

1. Deploy the OpenText Business Scenario transport packages in the order of the transport package numbers.
2. Store the transport containing the classification for workspaces types and document types under **Enterprise > Classifications > Types**. The OpenText Content Management system stores workspace and document type classifications in the location configured in the system. Check the configuration in **OpenText Content Management Administration > Configure Content Server Document Templates**. For more information, see section 2.9.1 [“Configuring document template settings” in OpenText Content Management - Business Workspaces Configuration Guide \(CSCWS-CGD\).](#)
3. Map the default repository in transport to the realtime Documentum Repository in the Business Object Types transport. After mapping, deploy the workbench

of OpenText Business Scenario Enterprise Asset Management Documentum – 04 transports.

2.3.3 Connecting to business application/sample app

For the business scenarios that can be connected to a business application, you can use the Business Scenario sample application that simulates the business application to create business workspaces. The connection to the sample application will be created automatically. You can check the connection in the OpenText Content Management Classic view at

Enterprise > Enterprise Application Integration > Connections to Business Applications (External Systems).

If you want to connect your own business application, you must replace the connection settings of the sample application with your own parameter.

For more information about connecting an external business application, see section 8.2 “Connecting a business application” in *OpenText Content Management - Enterprise Applications Integration and Configuration Guide (EEP-CGI)*.

Available sample applications – for the following business applications:

- **SAP S/4HANA**

The following sample applications are available:

- S4HanaSampleApp – to be used for the Add-on based integration with SAP S/4HANA.

Connection settings

- **Connection Type** – Business Scenario Sample Adapter.
- **Base URL** – https://localhost.
- **Application Server Endpoint** – https://localhost/S4HanaSampleApp.

Sample application data

- “Sample application data for Enterprise Asset Management” on page 41

- **SAP Side by Side**

The following sample application are available:

- SAP Side-by-Side – to be used for the Side-by-Side integration in the SAP Ariba Sourcing and Procurement for Public Sector in SAP S/4HANA business scenario.

Connection settings

- **Connection Type** – Business Scenario Sample Adapter.
- **Base URL** – https://localhost.
- **Application Server Endpoint** – https://localhost/S4HanaSampleApp.

User name and password will not be checked for a sample application. Nevertheless, the fields must be filled in since they are mandatory.

2.3.4 Users and groups

By default, each business scenario has two user groups. To access and use a business scenario, you must be assigned to one of these user groups. If you are not assigned to a group, contact the OpenText Content Management administrator who manages user groups.

The following groups are available for each business scenario:

- **OT <business scenario> User**

Example: *OT Agreements User*

Users that belong to this group can see the Departmental page, and create business workspaces.

- **OT Business Administrators (*business scenario*)**

Example: *OT Business Administrators (Agreements)*

Users that belong to this group can do the same as users of the group *OT <business scenarios> User*. In addition, they can

- Access the complete workspace content.
- Access and edit the complete configuration of the business scenario.

For more information about finding your business scenario groups, see *OpenText Content Management - Users and Groups User Guide (LLESWBU-UGD)*.

You can only see the groups and users that you have been assigned to.

As a business administrator, you can only view the groups and group members but you cannot change the group assignments.

2.3.5 Providing access to the Departmental page

Every Business Scenario delivers a predefined Departmental page to provide the business scenario user access to all related content in the Smart View. The users can access the departmental page by clicking the *<your business scenario>* tile on their Home page. To enable this tile for your business scenario, you can configure a shortcut to the Departmental page on your Home page.

Note that any business scenario user can create shortcuts including the Departmental page on their Home page, but only an Admin user or users of the Business Administrator group can configure the shortcuts for every user.

To connect a Departmental Page to your Home page:

1. On your Home page, open **Edit Page** in the profile menu.
2. Only for Admin users or Business Administrators: click **Everyone**, if you want to create the shortcut for everyone.

3. Click **Add shortcut**. The **Shortcut** popup opens.
4. Enter the following settings:
 - **Target object**– browse and select **Enterprise > OpenText Business Scenarios > <your business scenario Departmental page>**.
 - **Display name** – enter the display name for your business scenario, for example, Real Estate Management.
 - **Custom background image** – browse to **Support Asset Volume > Background Images > OpenText Business Scenarios Images**. Select your background image, for example, `bg_realestate_management.jpg`.
5. Click **Save**.

Note that users that do not have access to the Departmental page will see the message *Item cannot be accessed* instead of the shortcut. These users can hide the shortcut with the basic editing mode in the Edit Page tool.

For more information, see *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

2.4 Try out Business Scenarios

When a business scenario is deployed and configured, you can try it out as a business scenario user.

This section describes basic operations that you can perform when using any business scenario. For business workspace specific information like available workflows, used apps of the business application, and more, see the notable details section of the respective business workspace description.

If the business scenario is not yet connected to a business application, you can use the sample data of the Business Scenario Sample Application or standalone scenarios to try out the functions on OpenText Content Management side.

2.4.1 Create business workspaces

To collect all documents and other content of a specific business object, you first must create a business workspace.

Creating business workspaces manually

1. In the Header bar, click the **Create Business Workspace** button . In the side panel, select your workspace template.
2. You have the following options:

- if you have a business application or a sample application connected, you can search for a business object and reference it to manage content for. The metadata is then filled automatically.
- you can create the business workspace for a standalone scenario. In this case, you must maintain the metadata manually.

To generate the name of the business workspace, click the **Only required fields** toggle to show the mandatory attributes. You must at least provide these attributes.

3. After you have created the business workspace, it opens directly.

The business workspaces are created in **Enterprise** / *<Business Scenario> / <folder of your business workspace type>*.

If you do not have enough permission to access this folder from there, you can go to the Departmental page of your business scenario and click the respective shortcut in the **Workspaces** tile.

For more information about creating business workspaces, see *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

Referencing business workspace later

In case you want to collect content of a business object that is not yet available in your business application, you can initially create a business workspace manually in the Smart View and add the reference later or complete it from the business application, for example, from SAP S/4 HANA. See section 6.1.2 “Create and complete a business workspace” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)* and section 2.1.10.1 “Add a business reference” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

Automatic workspace creation

If the business scenario is connected to a business application and the automatic creation of business workspaces is enabled, the workspace with its metadata, relationships to other workspaces, and user to roles assignment is created automatically and kept synchronized with the data in the business application.

2.4.2 View and manage metadata

Business workspace metadata is stored in categories. If you use a standalone scenario without connection to a business application, you must maintain the metadata manually, either during workspace creation or later in the properties. Once filled in, you can change the metadata in the *<Business workspace>* Data tile in the **Overview** tab.

For information about how to maintain business workspace metadata manually, see section 1.4.33 “View the Properties page” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

2.4.3 View and manage relationships

Business workspaces can have relationships that help to navigate through the business process or hierarchy.

When the business scenario is connected to a business application, the relationships are created automatically. If you use a standalone scenario, you can maintain the relationships between business workspaces in the expanded *<Business workspace>* tile in the **Related** tabs of your business workspace.

For more information about how to maintain business workspace relationships manually, see section 2.3.3.1 “Add relationships” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

2.4.4 Find business workspaces

To find business workspaces, you have the following options:

- **Using business workspace tile on the Departmental page**

In the tile for your business workspace type on the Departmental page, you can see the recently accessed business workspaces, for example, Equipment workspaces on the Enterprise Asset Management page. If you expand the tile, you see all business workspaces that you are allowed to access.

- **Sort and filter in the business workspaces folder**

You also find business workspaces at **Enterprise > OT Business Scenarios > Business Workspaces > <your business workspace type folder>**. If you do not have enough permission to access this folder from there, you can go to the Departmental page of your business scenario and click the respective shortcut.

Filter workspaces – Click the **Show filters** button  to filter the list of your business workspaces.

In addition to the standard filter criteria, you have more filter options depending on the business workspace type.


For more information about how to use the filter, see section 1.4.20 “Filter items” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

Sort workspaces – You can sort by clicking the columns.

For more information about searching items in OpenText Content Management, see section 5.7 “Search” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

2.4.5 Open the business object in the business application

If a business workspace is connected to a business application, you can click the

Business application button  to open the referenced business object in the app of the business application.

See section 6.1.4 “Open business application” in *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

2.4.6 Open business workspace from the business application

You can work with the content of the business workspace inside a business application. The business workspace is either integrated directly in the app of the business application or a link helps you to open the business workspace. Depending on the configuration, you can either see a list with folders and documents, or the enlarged business workspace.

If a business workspace is just connected to a Business Scenario Sample Application, you can try out how a business workspace opens in a business application by using this URL pattern:

```
https://<your OpenText Content Management system>?func=xecmpf.
GetWspIntegration&extSysid=<sample business app ID>&botype=<business object
type>&bkey=<business object ID>
```

Replace <sample business app ID> with the following:

- SAP S/4HANA for SAP S/4 HANA
- SAP Side-by-Side for the Side-by-Side integration in the SAP Ariba Sourcing and Procurement for Public Sector S/4HANA business scenario
- Salesforce for Salesforce
- SAP Sales Cloud for SAP Sales Cloud

Example 2-1: Assembling the URL for the Business Entity workspace Munich Robotics Plant (0001/1)

To create or open the Business Entity workspace Munich Robotics Plant (0001/1), you must replace the following tags:

- <your OpenText Content Management system> – host and path of your OpenText Content Management system:
 - Host – myOpenText Content Management.com
 - Path – otcs/cs.exe
- extSysid – SAP S/4 HANA

- <business object type> – Business Object Type for business entity: BUS1501
- <business object ID> – Business Object ID for Munich Robotics Plant:
000100000001

Therefore, you must use the following URL:

```
https://myOpenText Content Management.com/otcs/cs.exe?func=xecmpf.  
GetWspIntegration&extSysid=SAP%20S/4HANA&botype=BUS1501&bokey=  
000100000001
```



For more information about available view settings for the integration URL, see *OpenText Content Management - Enterprise Applications Integration and Configuration Guide (EEP-CGI)*.

Chapter 3

Enterprise Asset Management

OpenText Documentum CM for SAP Solutions Enterprise Asset Management (EAM) is a comprehensive scenario for your maintenance management, your spare parts management, and your inventory management.

The Enterprise Asset Management Business Scenario supports the creation of workspaces and creation of relations across workspaces in OpenText Content Management and OpenText Documentum CM. This Business scenario can be easily configured by importing and exporting using Transport and importing the EAM config and deploying the DAR file on OpenText Documentum CM.

3.1 Business Processes

Enterprise Asset Management Business Scenario sample application

Before you connect to your SAP S/4HANA system you can use a sample application which simulates the SAP connection and provides the necessary business objects. In this way, you can view data in the workspace perspectives as well as the relationship between the objects for the relevant business workspaces. These are:

- Material (BUS1001006)
- Equipment (EQUI)
- Functional Location (BUS0010)
- Maintenance Notification (BUS2038)
- Maintenance Order (BUS2007) + Operation (AFVC_PM)
- Task list (BUS1019) and tasks (/OTX/RLTLO)

3.1.1 Departmental page

The Enterprise Asset Management Departmental page contains the following tiles:



About Enterprise Asset Management

Gives you general information about the Enterprise Asset Management business scenario.

Business Workspace shortcut tiles

Contains shortcuts and gives you quick access to the following workspace folders:







- Equipment

- Functional Locations
 - Maintenance Notifications
 - Maintenance Orders
 - Material
 - Task Lists
-

Business workspace tiles

Helps you to find a specific business workspace. The tiles list business workspaces that have been recently accessed. In the expanded view, you see all available business workspaces where you have access. To open a workspace, click the business workspace name.

The following business workspace tiles are available:

	Functional Locations
	Equipment
	Maintenance Orders
	Material
	Notifications
	Task Lists

Business workspace tiles

Help you to find a specific business workspace. The tiles list business workspaces that have been recently accessed. In the expanded view, you see all available business workspaces where you have access. To open a workspace, click the business workspace name.

The following business workspace tiles are available:

Functional Locations

Equipment

Maintenance Orders

Material

Notifications

Task Lists

3.1.2 Team Roles

To work with a business workspace and its content, a user must be added to a role of the business workspace team. In addition, this user must be added to a business scenario group, see [“Add users to groups” on page 41](#).

3.1.3 Equipment

An Equipment business workspace contains an equipment item and its data, for example, a conveyor belt. For each equipment item, you can create an Equipment workspace. For example, for the Conveyor belt (10001019), you can create a corresponding Conveyor belt workspace. In an Equipment workspace, you can manage all documents that are related to the equipment, for example, manuals and technical drawings, inspection reports, and warranty documents.

3.1.3.1 Equipment workspace perspective

The Equipment workspace includes the following options:

Overview tab

- **Team tile**

In the Team tile, you can view and manage all team members that are involved in the management of the equipment item.

- **Equipment Data tile**

In the Equipment Data tile, you can find all data of the equipment item. For more information about Equipment workspace metadata, see [“Notable details of the Equipment workspace” on page 25](#). You can also view the parent Material business workspace.

- **Sub Equipment tile**

The Sub Equipment tile displays the workspaces of related sub equipment items.

- **Permissions in Documentum tile**

This Permissions in Documentum tile list the business scenario users or groups that have access to this workspace on Documentum.

Related tab

- The Notifications, Maintenance Orders, and Material tiles list related workspaces that already have been created. From there, you can easily access the related business workspaces or maintain relationships manually.
In the Material tile, the child Material business workspaces will be listed.

Documentum tab

- In the Documentum tab, you can view all the folders and documents created in this workspace on Documentum. You can also upload and store all documents relevant to your equipment item.

3.1.3.2 Related business workspaces

An Equipment workspace is closely related to other business objects. An Equipment item can

- Belong to a **Functional Location**.
- Contain **Material**.
- Be subject of a **Maintenance Order**.
- Be subject of a **Maintenance Notification**.
- Be related to other **Equipment**.

The related business objects are represented by the relationships between the Equipment workspace and other workspaces. The related business workspaces of the equipment item help you to navigate through its file.

You can find and access the related business workspaces at different locations in the Equipment workspace.

Find and access related business workspaces:

Functional Location

- **Overview** tab > Equipment Data tile
- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Maintenance Notification

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Notifications tile

Maintenance Orders

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Maintenance Orders tile

Material

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
 - **Related** tab > Material tile
-

3.1.3.3 Notable details of the Equipment workspace

Categories

Equipment metadata is stored in the following categories:

- **Address** – information where the equipment item is located.
 - **Equipment** – metadata about the equipment items, for example, general information about type, serial numbers, and dates as well as Manufacturer Data, Responsibilities, Location, Account Assignment, and Warranties category sub sets.
-

Mandatory attributes

- Equipment Name
-

Search from Equipment workspaces folder**Filter options:**

- City
- Manufacturer Name
- Status

Sort options:

- Manufacturer
 - Category
 - Planning Plant
-

Reference business object from SAP S/4HANA

Note the following:

- The Equipment workspace is enabled to synchronize metadata, relationships and roles from SAP S/4HANA.
 - Referencing Equipment workspaces later is allowed.
-

Open the Equipment workspace in SAP S/4HANA

From an Equipment workspace, you can open the referenced Equipment object in SAP S/4HANA. The SAP Fiori app F2072 will be opened.

Open Equipment workspace from SAP S/4HANA application

The Equipment workspace can be opened in the following SAP transactions using the GOS Menu (Service for Object):

- IE03 – Display Equipment
-

3.1.4 Functional Location

A Functional Location workspace contains the information about the location where an equipment item is installed, for example, an arm robot. For each functional location, you can create a Functional Location workspace. For example, for the Articulated Arm Robot GiGi, you can create a corresponding Articulated Arm Robot GiGi workspace. In a Functional Location workspace, you can manage all documents that are related to the functional location, for example, manuals and technical drawings, inspection reports, and maintenance notifications and orders.

3.1.4.1 Functional Location workspace perspective

The Functional Location workspace includes the following options:

Overview tab

- **Team tile**

In the Team tile, you can view and manage all team members that are involved in the management of the functional location.

- **Functional Location Data tile**

In the Functional Location Data tile, you can find all data of the functional location. For more information about Functional Location workspace metadata, see [“Notable details of the Functional Location workspace” on page 28](#).

- **Sub Functional Locations tile**

The Sub Functional Location tile displays the workspaces of related sub functional locations.

- **Permissions in Documentum tile**

This Permissions in Documentum tile list the business scenario users or groups that have access to this workspace on Documentum.

Related tab

- The Equipment, Notifications, and Maintenance Orders tiles list related workspaces that already have been created. From there, you can easily access the related business workspaces or maintain relationships manually.

Documentum tab

- In the Documentum tab, you can view all the folders and documents created in this workspace on Documentum. You can also upload and store all documents relevant to your equipment item.

3.1.4.2 Related business workspaces

A Functional Location workspace is closely related to other business objects. A Functional Location can

- Belong to another **Functional Location**.
- Contain other **Functional Locations**.
- Contain **Equipment**.
- Be subject of a **Maintenance Order**.
- Be subject of a **Maintenance Notification**.

The related business objects are represented by the relationships between the Functional Location workspace and other workspaces. The related business workspaces of the functional location help you to navigate through its file.

You can find and access the related business workspaces at different locations in the Functional Location workspace.

Find and access related business workspaces:

Functional Location

- **Overview** tab > Functional Location Data tile

Sub Functional Location

- **Overview** tab > Sub Functional Location tile
- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Maintenance Notification

- **Related** tab > Notifications tile
- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Maintenance Orders

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

- **Related** tab > Maintenance Orders tile

Equipment

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Equipment tile

3.1.4.3 Notable details of the Functional Location workspace

Categories

Functional Location metadata is stored in the following categories:

- **Address** – information where the Functional Location is located, for example, postal code, country, city.
- **Equipment** – metadata about the related equipment item, for example, name, system and user status, and category.
- **Functional Location** – metadata about the functional location, containing the sub sets General, Manufacturer Data, Responsibilities, Location, Account Assignment, and Warranties.

Mandatory attributes

- Functional Location Name

Search from Functional Location workspaces folder

Filter options:

- Category
- City
- Manufacturer Name
- Status

Sort options:

- Category
- Planning Plant

Reference business object from SAP S/4HANA

Note the following:

- The Functional Location workspace is enabled to synchronize metadata, relationships and roles from SAP S/4HANA.
- Referencing Functional Location workspaces later is allowed.

Open the Equipment workspace in SAP S/4HANA

From an Functional Location workspace, you can open the referenced Functional Location object in SAP S/4HANA. The SAP Fiori app F2072 will be opened.

Open Functional Location workspace from SAP S/4HANA application

The Functional Location workspace can be opened in the following SAP transactions using the GOS Menu (Service for Object):

- IL03 – Display Functional Location

3.1.5 Maintenance Orders

A Maintenance Order business workspace contains a maintenance order and its data, for example, a maintenance order for a circulation pump. For each maintenance order, you can create an Maintenance Order workspace. For example, for the Maintenance of Circulation Pump (4000200), you can create a corresponding Maintenance of Circulation Pump workspace. In a Maintenance Order workspace, you can manage all documents that are related to the maintenance order, for example, work instructions, documents about equipment or functional locations, and analysis results.

3.1.5.1 Maintenance Order workspace perspective

The Maintenance Order workspace includes the following options:

Overview tab

- **Team tile**
In the Team tile, you can view and manage all team members that are involved in the management of the equipment item.
- **Maintenance Order Data tile**
In the Maintenance Order Data tile, you can find all data of the maintenance order. For more information about Maintenance Order workspace metadata, see [“Notable details of the Maintenance Order workspace” on page 31](#).
- **Sub Maintenance Orders tile**
The Sub Maintenance Order tile displays the workspaces of sub maintenance orders created under the maintenance order.
- **Permissions in Documentum tile**
This Permissions in Documentum tile list the business scenario users or groups that have access to this workspace on Documentum.

Manuals tab

- In the Equipment Manuals and Functional Location Manuals tiles, the respective SAP business attachments are stored.

Related tab

- The Maintenance Notifications tile lists related workspaces that already have been created. From there, you can easily access the related business workspaces or maintain relationships manually.

Documentum tab

- In the Documentum tab, you can view all the folders and documents created in this workspace on Documentum. You can also upload and store all documents relevant to your equipment item.

3.1.5.2 Related business workspaces

A Maintenance Order workspace is closely related to other business objects. A Maintenance Order can:

- Contain a **Functional Location**.
- Contain an **Equipment**.
- Contain other **Maintenance Orders**.
- Refer to a **Maintenance Notification**.

The related business objects are represented by the relationships between the Maintenance Order workspace and other workspaces. The related business workspaces of the maintenance order help you to navigate through its file.

You can find and access the related business workspaces at different locations in the Maintenance Order workspace.

Find and access related business workspaces:

Functional Location

- **Overview** tab > Maintenance Order Data tile
- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Maintenance Notification

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Maintenance Notifications tile

Sub Maintenance Orders

- **Overview** tab > Related Sub Maintenance Orders folder
- **Overview** tab > Maintenance Order Data tile

Equipment

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Overview** tab > Maintenance Order Data tile

Task List

- **Overview** tab > Maintenance Order Data tile
-

3.1.5.3 Notable details of the Maintenance Order workspace

Categories

Maintenance Order metadata is stored in the following categories:

- **Maintenance Order** – general Maintenance Order metadata and the subsets, for example, Reference Object, Responsibilities, Location, and Account Assignment.
-

Mandatory attributes

- Maintenance Order Name
-

Search from Maintenance Order workspaces folder**Filter options:**

- Functional Location
- Work Center
- Status

Sort options:

- Order Type
 - Equipment
 - Planning Plant
 - Start Date
 - End Date
-

Reference business object from SAP S/4HANA

Note the following:

- The Maintenance Order workspace is enabled to synchronize metadata, relationships, and roles from SAP S/4HANA.
- Referencing Maintenance Order workspaces later is allowed.

Open the Maintenance Order workspace in SAP S/4HANA

From a Maintenance Order workspace, you can open the referenced Maintenance Order object in SAP S/4HANA. The SAP Fiori app F2175 will be opened.

Open Maintenance Order workspace from SAP S/4HANA application

The Maintenance Order workspace can be opened in the following SAP transactions using the GOS Menu (Service for Object):

- IW33 – Display Order

3.1.6 Maintenance Notifications

A Maintenance Notifications business workspace contains a maintenance notification and its data, for example, for a worn-out conveyor belt. For each maintenance notification, you can create a Maintenance Notification workspace. For example, for the worn out Conveyor belt (10000305), you can create a corresponding Conveyor belt is worn-out (10000305) workspace. In a Maintenance Notification workspace, you can manage all documents that are related to the notification, for example, the notification document, notes, forms, and images/videos.

3.1.6.1 Maintenance Notification workspace perspective

The Maintenance Notification workspace includes the following options:

Overview tab

- **Team tile**

In the Team tile, you can view and manage all team members that are involved in the management of the notification.

- **Notification Data tile**

In the Notification Data tile, you can find all data of the maintenance notification. For more information about Maintenance Notification workspace metadata, see [“Notable details of the Maintenance Notification workspace” on page 34.](#)

- **Permissions in Documentum tile**

This Permissions in Documentum tile list the business scenario users or groups that have access to this workspace on Documentum.

Related tab

- The Maintenance Orders tile lists related Maintenance Order workspaces that already have been created. From there, you can easily access the related business workspaces or maintain relationships manually.

Documentum tab

- In the Documentum tab, you can view all the folders and documents created in this workspace on Documentum. You can also upload and store all documents relevant to your equipment item.

3.1.6.2 Related business workspaces

A Maintenance Notification workspace is closely related to other business objects. A Maintenance Notification can:

- Contain a **Functional Location**.
- Contain an **Equipment**.
- Refer to a **Maintenance Order**.
- Contain **SAP DM Documents**.

The related business objects are represented by the relationships between the Maintenance Notification workspace and other workspaces. The related business workspaces of the Maintenance Notification help you to navigate through its file.

You can find and access the related business workspaces at different locations in the Maintenance Notification workspace.

Find and access related business workspaces:

Functional Location

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Maintenance Order

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Maintenance Order tile

Equipment

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

SAP DM Documents

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
-

3.1.6.3 Notable details of the Maintenance Notification workspace

Categories

Maintenance Notification metadata is stored in the following categories:

- **Maintenance Notification** – general metadata and the subsets, for example, Reference Object, Responsibilities, Location, and Account Assignment.

Mandatory attributes

- Maintenance Notification Name

Search from Maintenance Notification workspaces folder

Filter options:

- Notification Type
- Reported By
- Status

Sort options:

- Notification Type
- Reported By
- Status

Reference business object from SAP S/4HANA

Note the following:

- The Maintenance Notification workspace is enabled to synchronize metadata, relationships and roles from SAP S/4HANA.
- Referencing Maintenance Notification workspaces later is allowed.

Open the Maintenance Notification workspace in SAP S/4HANA

From a Maintenance Notification workspace, you can open the referenced Maintenance Notification object in SAP S/4HANA. The SAP Fiori app F2071 will be opened.

Open Maintenance Notification workspace from SAP S/4HANA application

The Maintenance Notification workspace can be opened in the following SAP transactions using the GOS Menu (Service for Object):

- IW23 – Display PM Notification
-

3.1.7 Materials

A Materials business workspace contains a product and its data, for example, a conveyor belt. For each product, you can create a Material workspace. For example, for the Conveyor belt (2133), you can create a corresponding Conveyor belt (2133) workspace. In a Material workspace, you can manage all documents that are related to the product, for example, product specifications and documentation, technical documents, and product images and videos.

3.1.7.1 Material workspace perspective

The Material workspace includes the following options:

Overview tab

- **Material Data tile**

In the Material Data tile, you can find all data of the product. For more information about Material workspace metadata, see [“Notable details of the Material workspace” on page 36](#).

- **Permissions in Documentum tile**

This Permissions in Documentum tile list the business scenario users or groups that have access to this workspace on Documentum.

Related tab

- The Functional Location and Equipment tiles list related Functional Location and Equipment workspaces that already have been created. From there, you can easily access the related business workspaces or maintain relationships manually.

Documentum tab

- In the Documentum tab, you can view all the folders and documents created in this workspace on Documentum. You can also upload and store all documents relevant to your equipment item.

3.1.7.2 Related business workspaces

A Material workspace is closely related to other business objects. A Material can:

- Belong to a **Functional Location**.
- Belong to **Equipment**.
- Refer to a **Maintenance Order**.

The related business objects are represented by the relationships between the Material workspace and other workspaces. The related business workspaces of the product help you to navigate through its file.

You can find and access the related business workspaces at different locations in the Material workspace.

Find and access related business workspaces:

Functional Location

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Functional Locations tile

Equipment

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
- **Related** tab > Equipment tile

3.1.7.3 Notable details of the Material workspace

Categories

Material metadata is stored in the following categories:

- **Material** – besides general metadata, it contains the subset Dimensions/EAN.

Mandatory attributes

- Material Name

Search from Material workspaces folder

Filter options:

- Material Group
- Material Type
- Industry Sector

Sort options:

- Material Group
- Material Type

Reference business object from SAP S/4HANA

Note the following:

- The Material workspace is enabled to synchronize metadata, relationships and roles from SAP S/4HANA.

- Referencing Material workspaces later is allowed.

Open the Material workspace in SAP S/4HANA

From a Material workspace, you can open the referenced Material object in SAP S/4HANA. The SAP transaction F2773 will be opened.

Open Maintenance Notification workspace from SAP S/4HANA application

The Material workspace can be opened in the following SAP transactions using the GOS Menu (Service for Object):

- MM03 – Display Material
-

3.1.8 Task Lists

A Task List business workspace lists the steps that must be performed for a maintenance task.

A Task List workspace contains a task list and its data, for example, for a conveyor belt sprocket maintenance. For each Task List, you can create a Task List workspace. For example, for the Conveyor sprocket (E/8/2) task list, you can create a corresponding Conveyor sprocket (E/8/2) workspace. In a Task List workspace, you can manage all documents that are related to the task list, for example, work instructions, task list operations, results, and correspondence.

3.1.8.1 Task List workspace perspective

The Task List workspace includes the following options:

Overview tab

- **Team tile**

In the Team tile, you can view and manage all team members that are involved in the management of the task list.

- **Task List Data tile**

In the Task List Data tile, you can find all data of the task list. For more information about Task List workspace metadata, see [“Notable details of the Task List workspace” on page 39](#).

If the Task List has been processed, you can switch on the **Delete** toggle



- **Permissions in Documentum tile**

This Permissions in Documentum tile lists the business scenario users or groups that have access to this workspace on Documentum.

Related tab

- The Maintenance Orders tile lists related Maintenance Order workspaces that already have been created. From there, you can easily access the related business workspaces or maintain relationships manually.

Documentum tab

- In the Documentum tab, you can view all the folders and documents created in this workspace on Documentum. You can also upload and store all documents relevant to your equipment item.

3.1.8.2 Related business workspaces

A Task List workspace is closely related to other business objects. A Task List can:

- Be related to a **Functional Location**.
- Be related to **Equipment**.
- Belongs to a **Maintenance Order**.
- Be related to **Material**.
- Contains **Task List Operations**.

The related business objects are represented by the relationships between the Task List workspace and other workspaces. The related business workspaces of the task list help you to navigate through its file.

You can find and access the related business workspaces at different locations in the Task List workspace.

Find and access related business workspaces:

Functional Location

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Equipment

- On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.

Maintenance Order

- **Related** tab > Maintenance Order tile

Materials

- **Overview** tab > Task List Data tile
 - On the **Documentum** tab, click the Functional menu and then click **Properties > Relations**.
-

3.1.8.3 Notable details of the Task List workspace

Categories

Task List metadata is stored in the following categories:

- **Task List** – besides general metadata, it contains the subset Responsibilities.

Mandatory attributes

- Task List Name

Search from Task List workspaces folder

Filter options:

- Type
- Deleted

Sort options:

- Task List Type
- Planning Plant

Reference business object from SAP S/4HANA

Note the following:

- The Task List workspace is enabled to synchronize metadata, relationships and roles from SAP S/4HANA.
- Referencing Task List workspaces later is allowed.

Open the Task List workspace in SAP S/4HANA

From a Task List workspace, you can open the referenced Task List object in SAP S/4HANA. The SAP Fiori app F2660 will be opened.

Open Task List workspace from SAP S/4HANA application

The Task List workspace can be opened in the following SAP transactions using the GOS Menu (Service for Object):

- IA05 – Display General Task List

The Task List workspace can be opened in the following Fiori App:

F2660 – Find Maintenance Task List

3.2 Technical details

3.2.1 Involved components

The business scenario can run only integrated with SAP S/4HANA or with the sample application. A standalone scenario is not available.

- OpenText Documentum CM for SAP Solutions
- SAP S/4HANA 2023 or higher (on-premises or private cloud)
- OpenText Content Management SAP Add-On 0TCMBSC 2540_758 or higher

3.2.2 Deploy transport files

The configuration for equipment, functional location, maintenance order, maintenance notification, material, and task list are packaged in the following transport files:

- OpenText Business Scenario Enterprise Asset Management – 01.zip
- OpenText Business Scenario Enterprise Asset Management – 02.zip
- OpenText Business Scenario Enterprise Asset Management – 03.zip
- OpenText Business Scenario Enterprise Asset Management Documentum – 04.zip
- OpenText Business Scenario Enterprise Asset Management Setup.zip

To deploy the configuration in your OpenText Content Management application, follow the instructions at [“Importing and deploying transport packages for Business Scenarios”](#) on page 12.

3.2.3 Grant business administrator access

Before you can start as Business Administrator for Enterprise Asset Management, you must have enough permissions.

1. Add your user to group *OT Business Administrators* (Enterprise Asset Management).

3.2.4 Add users to groups

To give users the permission to access the Departmental page for Enterprise Asset Management, to create business workspaces in the Enterprise Asset Management scenario, you must add the users to one of these groups:

- OT Enterprise Asset Management User



Note: You must add the OTDS users as members to this group and consolidate it with Documentum Repository.

To synchronize user to groups based on user-role-assignments in SAP S/4HANA:

If you integrate the business scenarios into SAP S/4HANA, you can automatically assign users to groups in OpenText Content Management based on the user-to-roles assignments in SAP S/4HANA. For example, if user `pramos` is added to a role you specified in the *Mapping of SAP roles* program in your SAP S/4HANA system, the user `pramos` will be automatically added to the group *OT Enterprise Asset Management User* in OpenText Content Management.

For more information about how to configure the automatic assignment of users to groups, see *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

3.2.5 Sample application data for Enterprise Asset Management

The following business objects are delivered with the sample application for the Enterprise Asset Management business scenario:

Business Workspace Type	Business Workspace	Business Object Type
Functional Location	Munich Robotics Production Plant (0001-001)	BUS0010
Functional Location	Robot AI4 Factory (0001-001-002)	BUS0010
Functional Location	Robot construction (0001-001-002-CONST)	BUS0010
Functional Location	Articulated Arm Robot GiGi (0001-001-002-CONST-AAB1)	BUS0010
Functional Location	Assembly line Blue (0001-001-002-CONST-ASL1)	BUS0010
Equipment	Articulated Arm Robot GiGi (10001028)	EQUI
Equipment	Conveyor belt (10001019)	EQUI
Material	Articulated Arm Robot (2131)	BUS1001006
Material	Conveyor belt (2133)	BUS1001006

Business Workspace Type	Business Workspace	Business Object Type	B
Maintenance Notification	Conveyor belt is worn out (10000165)	BUS2038	0
Maintenance Order	Conveyor belt is worn out (4000248)	BUS2007	0
Maintenance Order	Inspection for articulated arm robot (4000249)	BUS2007	0
Task List	Articulated arm robot GiGi (E/5/1)	BUS1019	E

3.2.6 Configure business object declarations

To create business workspaces with a reference to a business object in SAP, you must maintain a business declaration for every business object type. In the configuration, use the following settings and select the **Use Widget for UI** and **Activation** options.

Object type	Property Provider	Search help name
EQUI	/OTX/RLSA_PM_CL_PP_EQUIPMENT	/OTX/RLSA_PM_SH_EQUIPMENT
BUS0010	/OTX/RLSA_PM_CL_PP_FUNC_LOC	/OTX/RLSA_PM_SH_FUNC_LOC
BUS2007	/OTX/RLSA_PM_CL_PP_ORDER	/OTX/RLSA_PM_SH_ORDER
AFVC_PM	/OTX/RLSA_PM_CL_PP_ORDER_OP	—
BUS1001006	/OTX/RLSA_0_CL_PP_MATERIAL	/OTX/RLSA_0_SH_MATERIAL
BUS2038	/OTX/RLSA_PM_CL_PP_NOTIFICAT	/OTX/RLSA_PM_SH_NOTIFICATION
BUS1019	/OTX/RLSA_PM_CL_PP_TASK_LST	/OTX/RLSA_PM_SH_TASKLIST
/OTX/RLTLO	/OTX/RLSA_PM_CL_PP_TASK_LST_OP	—

For more information about how to create business object declarations, see section 3.4 “Creating a business object declaration in SAP” in *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

Search Help F4 Support – some search fields require additional settings.

Object type	Search Help Name	Search Help Param	Input help type	Exact Search
EQUI	/OTX/RLSA_PM_SH_EQUIPMENT	SPRAS	List Box with Text	Checked

For more information about customizing Search Help in SAP, see section 3.19 “Customizing the search help in SAP” in *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

You create Maintenance order workspaces either for corrective maintenance or preventive maintenance processes. Each process requires different documents.

Therefore, two workspace templates are provided for maintenance order and the maintenance order operation.

Unique names – The business object types in the OpenText Content Management configuration expect the property `TEMPLATE_ID` to identify the workspace template that should be used for the business workspace. Therefore, the property `TEMPLATE_ID` must be filled on SAP side with a unique name for every business object type. Use a generic rule like `OBJKEY EQ<business object type>` that is always true.

List of predefined unique names per business object type:

Business Object Type	Unique Name
EQUI	ot_tmpl_equipment
BUS0010	ot_tmpl_func_location
BUS1001006	ot_tmpl_material
BUS2038	ot_tmpl_notification
BUS1019	ot_tmpl_task_list
/OTX/RLTLO	ot_tmpl_task_list_operati

Maintenance order workspaces – you create Maintenance order workspaces either for corrective maintenance or preventive maintenance processes. Each process requires different documents. Therefore, two workspace templates are provided for maintenance order and the maintenance order operation. For Maintenance Order (BUS2007) and Maintenance Order Operation (AFVC_PM), you must create the following settings in the **Generic Property Provider Custom Properties**.

Table 3-1: Generic Property Provider Custom Properties for BUS2007

Attribute	Operator	Active	Custom Property Name	Unique Name
TASK_LIST_KEY	NE	select	TEMPLATE_ID	ot_tmpl_maint_order_prev
OBJKEY	NE	select	TEMPLATE_ID	ot_tmpl_maint_order_corr

Table 3-2: Generic Property Provider Custom Properties for AFVC_PM

Attribute	Operator	Active	Custom Property Name	Unique Name
TASK_LIST_KEY	NE	select	TEMPLATE_ID	ot_tmpl_maint_order_op_pr
OBJKEY	NE	select	TEMPLATE_ID	ot_tmpl_maint_order_op_co

For more information about how to specify templates based on business properties, see *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

3.2.7 Configure synchronization between SAP S/4HANA and OpenText Content Management

To automatically create business workspaces and keep the data, relationships and user-to-role assignments synchronized with the data of the referenced business object in SAP, you must configure event triggers.

The following table shows you the event trigger per business object type and whether asynchronous or synchronous method can be used:

Business object	Create	Update
Equipment (EQUI)	Event (asynchronous)	Event (asynchronous)
Functional Location (BUS0010)	Event with change document (asynchronous)	Event with change document (asynchronous)
Maintenance Order (BUS2007) and Maintenance Order Operation (AFVC_PM) check	Event (asynchronous)	Event with change document (asynchronous)
Maintenance Notification (BUS2038)	Event (asynchronous)	Event with change document (asynchronous)
Product (BUS1001006)	Event (asynchronous or synchronous)	Event with change document (asynchronous or synchronous)
Task List (BUS1019)	Event (asynchronous or synchronous)	Event (asynchronous or synchronous)
Task List Operation (/OTX/RLTLO)	Event with change document (asynchronous)	Event with change document (asynchronous)

3.2.7.1 Configure Create events

For the automatic creation of business workspaces, link events for the following business objects to a receiver function module. Use as event CREATED.

Business object	Object type	Receiver type	Receiver Function Module
Equipment	EQUI	EQUI	/OTX/RM_WSC_UPD_ASYNC
Functional Location	/OTX/RLFLO	BUS0010	/OTX/RM_WSC_UPD_SUPER_ASYNC
Maintenance Order	BUS2007	BUS2007	/OTX/RLSA_PM_EVENT_ORD_ASYNC
Material	BUS1001006	BUS1001006	/OTX/RM_WSC_UPD or /OTX/RM_WSC_UPD_ASYNC
Maintenance Notification	BUS2038	BUS2038	/OTX/RM_WSC_UPD_ASYNC

Business object	Object type	Receiver type	Receiver Function Module
Task List and Task List Operations	/OTX/RLTLI	BUS1019	/OTX/RLSA_PM_EVENT_TLI_ASYNC

For more information, see *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

3.2.7.2 Configure Change events

For the automatic creation of business workspaces, link events for the following business objects to a receiver function module. Use as event CHANGED.

Business object	Object type	Receiver type	Receiver Function Module
Equipment	EQUI	EQUI	/OTX/RM_WSC_UPD_EXISTING_ASYNC
Functional Location	/OTX/RLFLO	BUS0010	/OTX/RM_WSC_UPD_SUPER_EXST_ASYNC
Maintenance Order and Maintenance Order Operation	/OTX/RLORD	BUS2007	/OTX/RLSA_PM_EVENT_ORD_ASYNC
Material	/OTX/RLMAT	BUS1001006	/OTX/RM_WSC_UPD_SUPER_EXST_ASYNC
Maintenance Notification	/OTX/RLNOT	BUS2038	/OTX/RM_WSC_UPD_SUPER_EXST_ASYNC
Task List and Task List Operations	/OTX/RLTLI	BUS1019	/OTX/RLSA_PM_EVENT_TLI_ASYNC

For more information, see *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

3.2.7.3 Configure Change document events

Some BOR object types cannot trigger each event type by default. Therefore, in some cases you must use change documents to react on different activities. Beforehand, make sure that change documents are written for all the business objects of interest.

Business Object	Change doc. object	Object Type	Event	Trigger Event
Address – for Functional Location and Equipment	ADRESSE	/OTX/RLADR	CHANGED	On Change

Business Object	Change doc. object	Object Type	Event	Trigger Event
Functional Location	IFLO	/OTX/RLFLO	CREATED	On Create
Functional Location	IFLO	/OTX/RLFLO	CHANGED	On Change
Material	MATERIAL	/OTX/RLMAT	CHANGED	On Change
Maintenance Order	ORDER	/OTX/RLORD	CHANGED	On Change
Notification	MELDUNG	/OTX/RLNOT	CHANGED	On Change
Task List	PLAN	/OTX/RLTLI	CREATED	On Create
Task List	PLAN	/OTX/RLTLI	CHANGED	On Change

For more information, see *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

3.2.8 Activate Fiori Apps

The OpenText Content Management for SAP Enterprise Asset Management Business Scenario uses SAP Fiori Apps to open the referenced business object from the business workspace. To have valid navigation links in the business workspace, you must activate the following SAP Fiori apps:

- F2072 – Find Technical Object for equipment
- F2175 – Find Maintenance Order
- F2773 – Access to product master data and context information
- F2071 – Find Maintenance Notification
- F2660 – Find Maintenance Task List

3.2.9 Enable UI integration in SAP Fiori apps

You can integrate the user interface for business workspaces into SAP Fiori apps in different ways:

1. We recommend using the Key user adaptation option of the Fiori app.

For more information, see SDK and API documentation of Content Management for SAP Solutions 24.4 (https://support.opentext.com/csm?id=kb_article_view&sysparm_article=KB0824884), section *Embedding Content (Object Pages) with Key User Adaptation*.

2. As alternative, you use the navigation to related Fiori apps with the **Smart Links** or **Related Apps** menu.

You can use the Fiori catalogs that includes ready-to-use target mappings to open the business workspaces in SAP Fiori apps.

- **Key user adaptation**

You can use the following URLs:

Equipment

```
?sap-ushell-config=headerless#MaintenanceObject-
openOTXECMTechnicalObject?
TechObjIsEquipOrFuncnlLoc={TechObjIsEquipOrFuncnlLoc}&
TechnicalObject={TechnicalObject}
```

Maintenance Order

```
?sap-ushell-config=headerless#MaintenanceOrder-openOTXECMOrder?
MaintenanceOrder={MaintenanceOrder}
```

Product master data

```
?sap-ushell-config=headerless#Material-openOTXECMMaterial?
Product={Product}
```

Maintenance Notification

```
?sap-ushell-config=headerless#MaintenanceNotification-
openOTXECMNotification?
MaintenanceNotification={MaintenanceNotification}
```

Maintenance Task List

```
?sap-ushell-config=headerless#MaintenanceNotification-
openOTXECMTaskList?MaintenanceTaskList={MaintenanceTaskList}
```

Maintenance Task list operations

```
?sap-ushell-config=headerless#MaintenanceTaskListOperation-
openOTXECMTaskListOperation?TaskListType={TaskListType}&
TaskListGroup={TaskListGroup}&
TaskListOperationInternalId={TaskListOperationInternalId}&
TaskListOpBOMItmIntVersCounter={TaskListOpBOMItmIntVersCounter}
```

Maintenance Orders Operations

```
?sap-ushell-config=headerless#MaintenanceOrderOperation-
openOTXECMOrderOperation?
MaintOrderRoutingNumber={MaintOrderRoutingNumber}&
MaintOrderOperationCounter={MaintOrderOperationCounter}
```

- **Related Apps or Smart Links menu**

Add the Fiori catalogs to an (PFCG) authorization role and assign the role to your Fiori Launchpad users. Users assigned to the role will then see the action to open the OpenText business workspace in the **Related Apps** menu of the Fiori apps listed above.

As a pre-condition, you must have customized the OData service and ICF service.

For more information, see section 18.4.1 “Frontend: Adding the OData services” in *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)* and section 18.4.2 “Frontend: Activating the ICF services” in *OpenText Content Management for SAP Solutions - Customizing Guide (ERLK-CGD)*.

Business Object	Catalog
Equipment (EQUI)	/OTX/RLSA_PM_S4_APPPS
Functional Location (BUS0010)	/OTX/RLSA_PM_S4_APPPS
Maintenance Order (BUS2007)	/OTX/RLSA_PM_S4_APPPS
Maintenance Notification (BUS2038)	/OTX/RLSA_PM_S4_APPPS
Maintenance Task list operations	/OTX/RLSA_PM_S4_APPPS
Maintenance Orders Operations	/OTX/RLSA_PM_S4_APPPS
Product (BUS1001006)	/OTX/RLSA_PM_S4_APPPS for material number with a length of 18 characters. If the length extension for material number is active and all material numbers are converted, you may also use the target mapping #Material-openOTXECMMaterialLength40 which is included in the Fiori catalog /OTX/RLSA_0_S4_APPPS.
Task List (BUS1019)	/OTX/RLSA_PM_S4_APPPS



Note: The catalogs expect that OpenText Content Management and SAP Fiori Launchpad URLs run under the same origin with a reverse proxy like an SAP Web Dispatcher. In case, you do not use a reverse proxy, you must make a client specific configuration for the catalogs and use the URL parameter `UseClassicConfig=true`. For more information, see the SDK and API documentation of Content Management for SAP Solutions 24.4 (https://support.opentext.com/csm?id=kb_article_view&sysparm_article=KB0824884).

3.3 Customizing Documentum

To create workspaces in Documentum, a cabinet with the name EAM should be created on Documentum and Write/Delete access should be provided to the OT Enterprise Asset Management User group. This cabinet should be used in the Workspace Type Location settings as part of the transports.

To configure the EAM business scenario:

1. Import EAM config to Documentum Client Configuration.
2. Deploy EAM.dar in the Repository using dar Deployer.



Note: For more information on Importing EAM config and deploying the DAR file, see *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)* and *OpenText Documentum Content Management - Composer User Guide (EDCPC-UGD)*.

Chapter 4

Adapting business scenarios to your needs

This section provides some guidelines for further adapting the business scenarios to your business requirements.

Precondition – to be able to adapt the business scenario to your needs, you must have the following usage privileges:

- Change/Remove Reference of Workspace ({848,2})
- Knowledge Manager ({901,1})
- Support Asset Manager ({1309,1})
- Perspective Tab ({30309,3})
- OpenText Content Management ({15,15})
- Business Workspaces ({15,14})

For more information about usage privileges, see section 30 “Usage Privileges” in *OpenText Content Management Admin Help - System Administration (LLESWBA-H-AGD)*

Editing Perspectives – to edit perspectives for business scenarios in the Perspective Manager, you must have the object privileges to change perspectives. For more information about object privileges, see *OpenText Content Management Admin Help - System Administration (LLESWBA-H-AGD)*.

4.1 Configuring your business scenario

As an OT Business Administrator, you have the permissions to edit the following configuration items for the business scenarios:

1. Categories
2. Classifications
3. Enterprise (where workspace instances are created in the Enterprise)
4. Workspace Types
5. Document Templates
6. Business Object Type
7. Facets & Custom Columns
8. WebReports
9. Perspectives

10. Unique names

4.2 Customizing property providers

If a delivered property provider class does not match your requirements, you have the option to define your own custom property provider. Follow the recommendations of the SDK and API documentation of Content Management for SAP Solutions 24.4 (https://support.opentext.com/csm?id=kb_article_view&sysparm_article=KB0824884).

4.2.1 Customizing basic settings by business scenario

Business scenarios come with a customizing table for basic settings. You can maintain it to define the behavior of the property providers:

1. Start the **SPRO** transaction and open the following link: **SAP Customizing Implementation Guide > OpenText Content Management for SAP Solutions > Business Scenarios > General Customizing > Maintain Property Provider Customizing by Business Scenario ID**.
2. In the **Basic Settings for Business Scenarios** maintenance view, create an entry for the Business Scenario ID `All Business Scenarios(ALL)`. The settings are used in the property provider classes listed in Business object declarations.

You can define the following settings:

- **Default Language** – default language to use for texts containing localized content, for example, a description of type. If no default language is defined, the default language for all scenarios is English.

It is recommended to maintain the default language only for the setting **ALL**. Then the same defaults are used for all property providers of shared business objects and for all property providers of specific scenarios.

Before you define another default language, make sure that the selection values for Content Server category attributes of type `text` popup are matching the values in the default language.

- **Default Country** – default country to use for decimal notation for currency or amount values. For example, for material property provider there are gross weight, net weight, and volume amounts. If no default country is defined, the default country for all scenarios is `US`.
- **Default Currency Position** – default position used in concatenated values of money amount values and currency keys.

Example: The purchase order property provider returns a property which returns the `net order value` and its currency key in one text value. If no default currency position is defined, the default position of the currency key is to the right of the amount value.

- **Default if currency key is separated by space** – a default flag if the currency key is separated from the money amount value by a space. If no default is defined, a space is used as a separator.

Example: A money amount is 50 . 00 and the currency key is EUR.
If the currency position is right and the separator is used, then a property would be 50 . 00 EUR.
When the position is left and no separator is used, the same property would be EUR50 . 00.

