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OpenText™ Documentum™ Content Management for Engineering

Installation Guide

Install and configure OpenText Documentum Content Management (CM) for Engineering.

EEGAM250400-IGD-EN-02

OpenText™ Documentum™ Content Management for Engineering
Installation Guide

EEGAM250400-IGD-EN-02
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This documentation has been created for OpenText™ Documentum™ Content Management for Engineering CE 25.4.
It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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Chapter 1

Overview

This guide provides the instructions for installing the OpenText Documentum CM for Engineering and Connector solution. In addition, provides the installation prerequisites and instructions for installing and upgrading the application.

This application consists of two components:

- OpenText Documentum CM for Engineering Configuration: The web-based application, also known as client configuration, for administrators to use to configure settings such as automated content-handling processes and background settings for OpenText Documentum CM for Engineering client.
- OpenText Documentum CM for Engineering clients: The web-based application, also known as *Classic View*, that provides the ability to interact with content in one or more repositories. OpenText Documentum CM for Engineering Smart View is also available and can be installed from the standard installer and configured using client configuration.

This guide is intended for administrators who have experience working with the OpenText Documentum CM platform and managing OpenText Documentum CM applications through client configuration.

Chapter 2

Getting started

Use the information provided in this section to understand the OpenText Documentum CM for Engineering architecture and the components you must install while installing the OpenText Documentum CM for Engineering.

2.1 System configuration

The following diagram illustrates the architecture of the OpenText Documentum CM for Engineering:

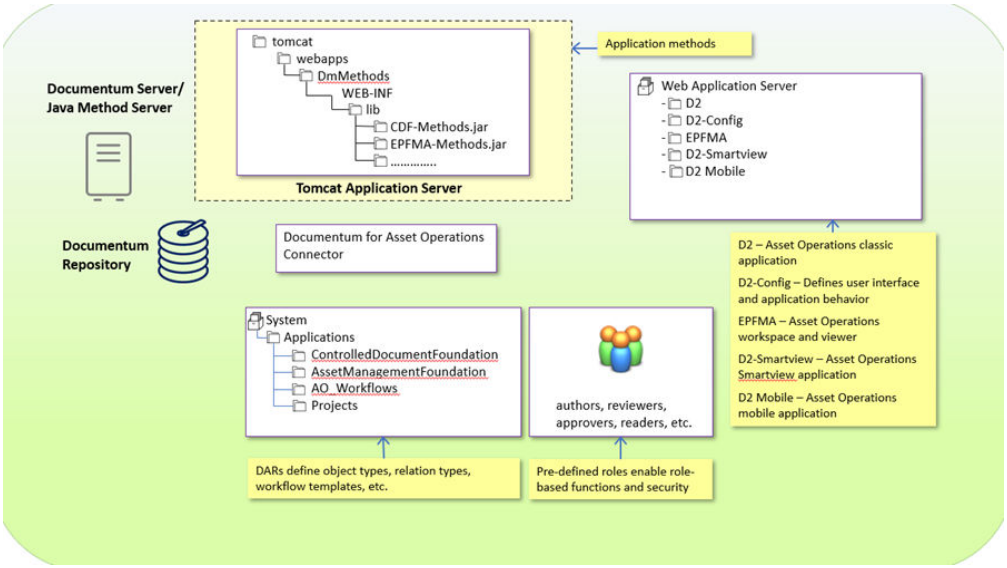


Figure 2-1: OpenText Documentum CM for Engineering

2.2 Reviewing system requirements

Verify that the servers and computers meet the system requirements outlined in the *OpenText Documentum CM for Engineering 25.4 Release Notes*. For more information, see OpenText My Support (support.opentext.com)

Log in as a member of the local administrators to the computer on which you are running the installation procedure.

2.3 Preparing the installation package

1. Download the `EPFM-AO-25.4.zip` installation package from OpenText My Support (support.opentext.com).

   The installation package contains OpenText Documentum CM for Engineering installer related files.

2. Extract the installation package to a temporary location on the OpenText Documentum CM host.

   For example, `C:\Temp\EPFM` (Microsoft Windows) or `/usr/dmadmin/temp` (Linux).

2.3.1 Prerequisites

Perform the following task before installing OpenText Documentum CM for Engineering:

- Download OpenText Documentum CM client 25.4 from OpenText My Support (support.opentext.com).

  Note: Refer to *Upgrading the client on Documentum CM* section in *OpenText Documentum Content Management - Client Installation Guide (EDCCL250400-IGD)*, if you are upgrading from any previous client version.

- OpenText Documentum CM must contain localized Spanish version if you want to use OpenText Documentum CM for Engineering with Spanish locale.

  The *OpenText Documentum Content Management - Server Administration and Configuration Guide (EDCCS250400-AGD)* contains additional instructions on populating and publishing localized Data Dictionaries into the repository.

  For more information about localization, see *Installing language packs* chapter in *OpenText Documentum Content Management - Client Installation Guide (EDCCL250400-IGD)*.

- Browser locale must be set to Spanish or Brazilian Portuguese for localization feature to work in your environment.

2.4 Verifying the system components

1. Verify that the following components are running on the Documentum CM Server host:

   - Connection Broker
   - OpenText Documentum CM Server

2. Verify that the following components are installed on the Documentum CM Server host:

   - Java Development Kit

- Documentum Composer

3. Verify that Documentum D2-API is installed on the Documentum CM Server host. For installing Documentum Content Management client on OpenText Documentum CM, see *OpenText Documentum Content Management - Client Installation Guide (EDCCL250400-IGD)*.
4. Ensure that the OpenText Documentum CM client configuration and OpenText Documentum CM client web applications are on a web application server.
5. Ensure that the version of OpenText™ Documentum™ Content Management Process Engine that is installed is compatible with your version of Documentum CM Server.

   OpenText Documentum CM for Engineering and Enterprise Content Management Controlled Document Foundation depend on the DAR files included with OpenText Documentum CM Process Engine. These files are `TCMReferenceProject.dar`, `Forms.dar`, and `BPM.dar` applications deployed on Java Method Server.

After you install OpenText Documentum CM for Engineering, you must start OpenText Documentum Content Management (CM) Transformation Services – Documents, OpenText Documentum Content Management (CM) Thumbnail Server, and OpenText Documentum Content Management (CM) xPlore-related services.

2.5 Turning off the default audit events for OpenText Documentum CM Server

Turning off the default audit events enables a more readable and streamlined audit trail. For more information about default audit events, see *OpenText Documentum Content Management - Server Administration and Configuration Guide (EDCCS250400-AGD)*.

1. Log in to **Documentum Administrator** as a user with the **Config Audit** privilege.
2. Browse to **Audit Management**.
3. Select **Manage Auditing by events selected for all objects in the repository**.
4. Select **dm_default_set** and click **Remove**.
5. Restart the repository.

2.6 Packaging a OpenText Documentum CM client configuration

If you have existing client configuration, export them to create backup copies.

Note: To confirm the backup was successful, import the configuration to a temporary repository and confirm the list of exported configurations successfully displays before cancelling, or importing the configurations.

If you have multiple client applications, you must consider exporting each individually as further backup before upgrading OpenText Documentum CM for Engineering. Also, ensure the upgrade and restoration of prior configurations runs successfully in a non-production environment before installing OpenText Documentum CM for Engineering in a production environment.

1. In OpenText Documentum CM client configuration, select **File > Export configuration** to save your current configurations.
2. Install OpenText Documentum CM for Engineering to the left of the client configuration matrix to ensure it has a priority.
3. Reapply the previous configurations, if required, after installing the OpenText Documentum CM for Engineering.

For more information about the client configuration, see *OpenText Documentum Content Management - Client Installation Guide (EDCCL250400-IGD)*.

2.7 Registering clientFoundation Java API clients as privileged clients

All client Foundation Java API clients (client, client configuration servers, Client Branch Office Caching Services/Branch Office Caching Services servers or BPM servers to which client has been deployed) must be approved as privileged clients in each applicable repository. It is not necessary to approve the Java Method Server (JMS) Foundation Java API client as a privileged client because it runs on the OpenText Documentum Content Management (CM) server and is automatically a Trusted Foundation Java API client. Failure to approve a client Foundation Java API client as a privileged client will result in errors when that Foundation Java API client attempts to access the client keystore in the global registry repository or attempts to execute code in privileged mode.

Approval is granted using Documentum Administrator.

To register client Foundation Java API clients as privileged clients

1. You can view the list of Foundation Java API clients for a given repository that can be approved as privileged clients in Documentum Administrator by navigating to **Administration > Client Rights Management > Privileged**

Clients. For more information about *Privileged Clients*, see *OpenText Documentum Content Management - Server Administration and Configuration Guide (EDCCS250400-AGD)*.

Note: A Foundation Java API client is registered the first time it connects to the Documentum CM Server. You might need to run the client once (for example, run the client configuration web application) in order to register it. To help you locate clients in the list of registered clients, you can filter the list by Client Name by entering a prefix in the text box with help text **Starts with** and click the arrow button.

2. Select the desired clients from the list on the left-hand side and insert them into the list on the right-hand side. Click **OK**.

3. Right-click on a client and select **Approve Privilege**.

   With default settings in `dfc.properties`, it can be difficult to identify the registered clients that you want to approve of as privileged clients. To help, you can associate a client name with each by adding a `dfc.name` property to the client's `dfc.properties` file. For example: `dfc.name=D2_10.141.58.212`

   The Client Name is prefixed with this value when it appears in the list of Privileged Clients or list of registered clients on the **Manage Clients** dialog. You can then filter by Client Name to find registered clients that have a given prefix in their name.

   To confirm that the client you selected is the one that you want to approve as a privileged client, you might need to compare its Client ID value as displayed in Documentum Administrator with the client ID value stored in its `dfc.keystore` file.

   To find the client ID, use the java keytool command line utility:

   a. Open a command prompt and go to the folder where the `dfc.properties` file for your Foundation Java API client is located. Typically, this folder is the `WEB-INF/classes` folder of the associated web application. If the `dfc.security.keystore` file property in the `dfc.properties` file has not been set, then this folder contains the desired `dfc.keystore` file. If it has been set, then the value of this property will give the path to the desired `dfc.keystore` file.

      Note that the `dfc.keystore` file is created the first time a Foundation Java API client connects to the Documentum CM Server.

   b. Once you have located the folder for the `dfc.keystore` file, go to this folder in a command shell and run the java keytool command:
      `keytool -list -keystore dfc.keystore -storepass dfc -v`

4. The resulting output contains detailed information about the certificate stored in the keystore. The value of the CN parameter in the Owner field value is the desired Client ID. For example, if the resulting output contains the following line:
   `Owner: CN=dfc_t2zN2bJv8DDyMlZbXD9qJJTWiXAa, O=OpenText, OU=Documentum`

The desired Client ID is `dfc_t2zN2bJv8DDyMlZbXD9qJJTWiXAa`.

Chapter 3

Installing OpenText Documentum CM for Engineering

3.1 Installation scripts

OpenText Documentum CM for Engineering provides installation scripts to install the solution on a Microsoft Windows Documentum CM Server host.
The installation script automates the following tasks:

- Installs DAR files that contain object type definitions, workflow templates, and permission sets.
- Populates roles and creates registered tables.
- Copies the Server Method JAR files to Java Method Server.
- Installs client configuration of the product.
- Updates the OpenText Documentum CM for Engineering client widgets, dictionaries, and alias that references application host and port based on the install inputs.

The installation script does not perform the following components:

- Documentum CM Server xPlore attribute settings to index the properties you want to display in facet search results.
- Content Transformation Services settings to render asset documents.
- Email and client application server settings.
- The installation script copies the `EPFMA.war` to the `webapps` folder. You must update the `dfc.properties` file to point to the correct path.

Note: OpenText recommends to install application server and Documentum CM Server in two different computers.

3.2 Installing OpenText Documentum CM for Engineering on Microsoft Windows

Components of OpenText Documentum CM for Engineering are installed on the OpenText Documentum Content Management and application server.

3.2.1 Installing components on OpenText Documentum CM

This script installs the Composer DARs, scripts, and copies the required libraries to the Java Method Server.

Note: You must set the operating systems preferred and display language as English before you run the OpenText Documentum CM for Engineering installer.

The preferred and display language can be set as Spanish after you complete the OpenText Documentum CM for Engineering installation.

To install components on OpenText Documentum CM

1. Download the OpenText Documentum CM for Engineering 25.4 Installer package. The file name is **epfm-ao-25.4.zip**.
2. Copy the Installer package to the OpenText Documentum CM.
3. Update **JAVA_HOME** as per the OpenText Documentum CM supported JDK environment variable with the path `C:\Documentum\java64\JAVA_LINK`.

   Note: If you are using JDK 17 version or later, you must set the following `JAVA_TOOL_OPTIONS` system variable.

   ```
   --add-opens=java.base/java.lang=ALL-UNNAMED --add-opens=java.base/
   java.lang.invoke=ALL-UNNAMED
   --add-exports=java.base/sun.security.provider=ALL-UNNAMED --add-exports=java.base/
   sun.security.pkcs=ALL-UNNAMED
   --add-exports=java.base/sun.security.x509=ALL-UNNAMED --add-exports=java.base/
   sun.security.util=ALL-UNNAMED
   --add-exports=java.base/sun.security.tools.keytool=ALL-UNNAMED -
   Djava.locale.providers=COMPAT,SPI -Djava.security.manager=allow
   ```

4. Extract the installation package to a temporary location. For example: `C:\temp\<AO25.4 folder>\`
5. Browse to the unzipped installation package and open `InstallAOProjectOnCS.bat` in a text editor.
6. Update the following values according to your environment:

   ```
   set LOCAL_REPOSITORY=<local docbase name>
   set LOCAL_REPO_USERNAME=<local docbase installation owner name>
   set LOCAL_REPO_PASSWORD=<local docbase installation owner password>
   set GLOBAL_REPOSITORY=<global docbase name>
   set GLOBAL_REPO_USERNAME=<global docbase installation owner name>
   set GLOBAL_REPO_PASSWORD=<global docbase installation owner password>
   REM # If DFC_SHARED_DIR contains whitespace then enclose within double quotes.
    For example, set "DFC_SHARED_DIR=C:\Program Files\Documentum\Shared"
   ```

```
set DFC_SHARED_DIR=<Path of Documentum shared folder>
set CONTENT_SERVER_VERSION=<Documentum Server version>
set JAVA_HOME=<path to java jdk bin folder> For example, C:\Documentum
\java64\JAVA_LINK
```

7. Click **Save**.
8. The Composer DAR file uses `dmadmin` as an installation parameter for the installer value.

   If dmadmin account does not exist in the target repository, perform the following:

   a. Browse to the package `EPFM-AO-25.4\install-ao-25.4\RepositoryConfig\docapps\global` path.
   b. In `AO_Workflows.installparam` file, locate *`dmadmin`* parameter tag and update the value for `Value` attribute.
   For example: `<parameter key="dmadmin" value="My Admin User Name" defaultValue=" "/>`.

   ```
   <parameter key="dmadmin" value="Administrator"
   defaultValue="dmadmin"/>
   ```

   c. In `Projects.installparam` file, add `dmadmin` parameter tag.
   For example: `<parameter key="dmadmin" value="<My Admin User Name>" defaultValue=" "/>`
   d. In `AssetManagementFoundation.installparam` file, add `dmadmin` parameter tag. For example: `<parameter key="dmadmin" value="<My Admin User Name>" defaultValue=" "/>`
9. Run the `InstallAOProjectOnCS.bat` file.

   The command prompt displays the status of the installation.
10. After the installation is complete, verify the log files (`\AO\EPFM-AO-25.4\logs`) and ensure that no error is displayed in install logs.
11. Stop all Documentum CM Server services, clear the Documentum CM Server cache and update the JDK path to JDK version that is installed with Documentum CM Server.
12. Start all Documentum CM Server services.

3.2.2 Installing workflows using Documentum Content Management Workflow Designer

From OpenText Documentum Content Management for Engineering 22.4 release onwards, Documentum Process Builder/workflow manager is not supported. Instead, you must use Workflow Designer to create and install OpenText Documentum CM for Engineering workflows.

Notes

- The OpenText Documentum CM for Engineering workflows are migrated through Workflow Designer and packaged for installation. You can find the zip package file in the `EPFM-AO-25.4\bpm\ao_bpm.zip` path.
- To access the Workflow Designer application and command line interface, make sure that the documentum_workflow_designer role is assigned to the repository user in Documentum Administrator. Only the users who are part of the documentum_workflow_designer role can access the application and Workflow Designer Command Line Interface commands.

See *OpenText Documentum Content Management - Workflow Designer Deployment Guide (EDCPKL250400-IWD)* and *(EDCPKL250400-UGD)* on see OpenText My Support (support.opentext.com) for more information about Workflow Designer in the client environment.

To install the workflows using Workflow Designer

1. Download the **DocumentumWorkflowDesigner.war** and **DocumentumWorkflowDesigner_CLI.zip** file from OpenText My Support (support.opentext.com).

   To deploy Workflow Designer in the client environment, see *OpenText Documentum Content Management - Workflow Designer Deployment Guide (EDCPKL250400-IWD)*.

2. Verify if the Tomcat application server is running.

3. After installing Workflow Designer, verify that it is running properly by navigating to the following URL in the browser:*`http://<host>:<port>/DocumentumWorkflowDesigner`*

4. Extract the **DocumentumWorkflowDesigner_CLI** file to a local drive.

5. Open the `wfd.properties` file, and update Workflow Designer URL.

   For example: `wfd.rest-base-url = http://<Host>:<Port>/DocumentumWorkflowDesigner`

6. To install workflows, open the command prompt from the `DocumentumWorkflowDesigner_CLI` folder.

The OpenText Documentum CM for Engineering default workflows package is available in the path `EPFM-AO-25.4\bpm\ao_bpm.zip`. If you are upgrading OpenText Documentum CM for Engineering, you must use the export package as defined in step 4 in "Preparing for the upgrade" on page 40 section.

Run the following command to import and install workflow processes:

```
java -jar xcp-designer-cmd-25.4.jar -Dcmd=pkg-install [-Drepo=<repo] -Duser=<repo
user> -Dpwd=<repo user password>
-Dpackage=<input package file location> [-Dforce=1] [-Dprocess-list-in=<selection
input file location>] [-Dconfig=<path to wfd.properties file>]
```

For example: `java -jar xcp-designer-cmd-25.4.jar -Dcmd=pkg-install -Drepo=testenv -Duser=Administrator -Dpwd=Password@123 -Dpackage=EPFM-AO-25.4\bpm\ao_bpm.zip -Dforce=1 -Dconfig=wfd.properties`

For more information about workflow commands, see *(EDCPKL250400-UGD)*.

7. Verify that there are no error messages in the `DocumentumWorkflowDesigner_CLI\logs` file.

   Note: You can view the installed processes by logging into the Workflow Designer with Admin credentials. For example: **http://<Host>:<Port>/DocumentumWorkflowDesigner**

8. Stop the Apache Tomcat application server that contains the client application.

3.2.3 Installing on Application Server

The script resets the client application in the target system and reinstalls the client configuration, widget URL, dictionaries, and alias that matches with that of the host or port. This script updates the system to indicate that Aveva activity must be enabled in the workflow.

Caution

If there are any existing custom client configuration, you must export these before you run the `InstallAOProjectsOnAS.bat` file. The `bat` file resets the existing client configuration.

Note: Grant the MBeanTrustPermission in the following file: `%DOCUMENTUM%\java64\JAVA_LINK\conf\security\java.policy`

Update the `java.policy` file and add `permission javax.management.MBeanTrustPermission "register";`.

Perform the following to install OpenText Documentum CM for Engineering on application server:

To install OpenText Documentum CM for Engineering on application server

1. Download the OpenText Documentum Content Management for Engineering 25.4 Installer package. The file name is `EPFM-AO-25.4.zip`.

2. Copy the Installer package to the application server.
3. Extract the installer package to a temporary location. For example, `C:\temp\<AO25.4 folder>\`
4. Browse to the unzipped installation package and open the `InstallAOProjectOnAS.bat` in a text editor.
5. Update the following values according to your environment:

```
set LOCAL_REPOSITORY=<local docbase name>
set LOCAL_REPO_USERNAME=<local docbase installation owner name>
set LOCAL_REPO_PASSWORD=<local docbase installation owner password>
set GLOBAL_REPOSITORY=<global docbase name>
set GLOBAL_REPO_USERNAME=<global docbase installation owner name>
set GLOBAL_REPO_PASSWORD=<global docbase installation owner password>
REM example C:\apache-tomcat-10.x.x\webapps
set WEB_APP_FOLDER=<Location of webapps folder in application server>
set JAVA_HOME=<path to java JDK bin folder>
set D2_APP_URL=<Application url with port number>For example, set D2_APP_URL=http://
localhost:8080/D2

set DFC_SHARED_DIR=<Path to D2-Config\WEB-INF\lib directory on application server>

set DCTM_CONFIG_DIR=<Path to D2-Config\WEB-INF\classes directory on application
server>

set D2_WEBAPP_PATH=%WEB_APP_FOLDER%\D2

set SETUP_HAS_AVEVA=false
For example, if Aveva is configured this value should be set to true.
set SKIP_D2CONFIG_INSTALL=false
REM # SKIP_D2CONFIG_INSTALL - Default is false. You can change it to true and
installer will skip install the D2-Config and only update the post d2-config config
 (assuming D2-config has been manually installed prior).
```

Note: If your OpenText Documentum Content Management client(s) and OpenText Documentum Content Management Config are installed in different systems:

```
set DFC_SHARED_DIR=C:\apache-tomcat-10.x.xx\webapps\<D2 or D2-Smartview or D2-
Config>\WEB-INF\lib
     set DCTM_CONFIG_DIR=C:\apache-tomcat-10.x.xx\webapps\<D2 or D2-Smartview or
D2-Config>\WEB-INF\classes
```

6. Update the following property for Brava Viewer.

```
set BRAVA_SERVER_URL=<http://bravaserverIP:8080>
```

For example, *http://bravaserver:8080*

7. Run the file in a command prompt.
8. Verify the log files and ensure that there are no errors in install logs.
9. Restart the application server.
10. Verify that the `dfc.properties` points to the required repository in EPFMA webapps folder.

3.2.4 Installing OpenText Documentum CM for Engineering Smart View on Application Server

The installer contains the AOD2Smartview installer.

To install OpenText Documentum CM for Engineering Smart View on application server

1. Browse to the unzipped installation package.
2. Edit the `InstallAOD2Smartview.bat` file in a text editor.
3. Update the following properties:

   ```
   set WEB_APP_FOLDER=<Location of webapps folder in apache tomcat>
   ```

   Specifies the location of the webapps folder. For example `C:\apache-tomcat-10.x.x\webapps`
4. Run the file in a command prompt.

3.2.5 Updating Brava server URL

1. Update Brava server URL in client configuration at **D2 > Widget view > Widget > Brava Viewer** for **Brava! Server Url**:

   ```
   http://<BravaServerHostname>:8080
   ```
2. Browse to `..\<apache-tomcat-10.x.x>\webapps\D2\igc\brava_parameters.properties` file and update the **ServerHostName** and **D2URL** details.
3. Restart the application server.

Note: If you have installed the OpenText Documentum CM for Engineering by using the https protocol, then you must update the Brava URLs with https protocol.

3.3 Configuring OpenText™ Directory Services (OTDS) support

For more information about OTDS configuration, see *OpenText Documentum Content Management - Client Installation Guide (EDCCL250400-IGD)*.

3.4 Installing OpenText Documentum CM for Engineering on Linux

3.4.1 Installing on OpenText Documentum CM

This script installs the Composer DARs and scripts, and copies the necessary libraries to the Java Method Server.

1. Before starting the installation, verify the following:
   a. Documentum CM Server is of version 25.4.
   b. Java Method Server is stopped.
   c. The latest version of Composer is installed.
   d. The repository is running.
   e. The following files in the unzipped installation package have the `execute` permission:

      `<unzipped installation package>/*.sh`
2. Run the `chmod` command on the `InstallAOProjectOnCS.sh` file.
3. Open a terminal window and browse to the unzipped installation package.
4. Open the `InstallAOProjectOnCS.sh` by using an editor.
5. Update the following argument according to your environment.

```
LOCAL_REPOSITORY=<local docbase name>LOCAL_REPO_USERNAME=<local docbase
installation owner name>

LOCAL_REPO_PASSWORD=<local docbase installation owner password>

GLOBAL_REPOSITORY=<global docbase name>GLOBAL_REPO_USERNAME=<global docbase
installation owner name>

GLOBAL_REPO_PASSWORD=<global docbase installation owner password>

CONTENT_SERVER_VERSION=<Documentum Server version>

JAVA_HOME=<path to java jdk bin folder>
```

6. Save the file.
7. The Composer DAR file uses `dmadmin` as an installation parameter for the installer value.

   If dmadmin account does not exist in the target repository, go to the unzipped installation package `EPFM-AO-25.4.0XXX\install—ao—25.4\RepositoryConfig\docapps\global` path and update the `([DAR_NAME].installparam)` file for `dmadmin`.

   For example: `<parameter key="dmadmin" value="MyNewInstallerName" defaultValue=" "/>`
8. Run one of the following commands:

- `sh InstallAOProjectOnCS.sh`
- `./InstallAOProjectOnCS.sh`

9. Verify the log files and ensure that there are no errors.
10. Restart the Java Method Server.

3.4.2 Installing workflows using OpenText Documentum Content Management (CM) Workflow Designer

For more information about installing workflows using Workflow Designer, see "Installing workflows using Documentum Content Management Workflow Designer" on page 18.

3.4.3 Installing on Application server

The script resets the client application in the target system and reinstalls the client configuration, update the widget URL, dictionaries, and alias that matches with that of host or port. This script also updates the system to indicate that Aveva activity must be enabled in the workflow.

1. Copy the AO package to the application server.

   Extract the AO package to a temporary location. For example: `<unzipped installation package>/ *.sh`

2. Browse to the unzipped installation package and open the `InstallAOProjectsOnAS.bat` in a text editor.
3. Update the following values as per your environment:

```
LOCAL_REPOSITORY=<local docbase name>LOCAL_REPO_USERNAME=<local docbase
installation owner name>

LOCAL_REPO_PASSWORD=<local docbase installation owner password>

GLOBAL_REPOSITORY=<global docbase name>GLOBAL_REPO_USERNAME=<global docbase
installation owner name>

GLOBAL_REPO_PASSWORD=<global docbase installation owner password>

DFC_SHARED_DIR=<Path to D2-Config\WEB-INF\lib directory on app server>

For example, set DFC_SHARED_DIR=/opt/apache-tomcat-10.x.x/webapps/D2-Config/WEB-
INF/classes

DCTM_CONFIG_DIR=<Path to D2-Config\WEB-INF\classes directory on app server>.

For example, set DCTM_CONFIG_DIR=/opt/apache-tomcat-10.x.x/webapps/D2-Config/WEB-
INF/classes

JAVA_HOME=<path to java JDK bin folder>
```

4. Save the file.
5. Run the file in a command prompt.

6. Verify the log files and ensure that there are no errors.
7. Stop and restart Java Method Server, repository, and connection broker.
8. Stop and restart application server.

3.4.4 Configuring OpenText™ Directory Services (OTDS) and Licensing on Linux

For more information about OTDS and Licensing related information on Linux, see "Configuring OpenText™ Directory Services (OTDS) support" on page 21 and "Licensing OpenText Documentum CM for Engineering" on page 25.

Chapter 4

Completing the installation

4.1 Licensing OpenText Documentum CM for Engineering

OpenText Documentum CM uses OpenText™ Directory Services (OTDS to apply licenses for all the OpenText Documentum CM components. For more information about procuring the license file and configuring OTDS and license, see *OpenText Documentum Content Management - Server and Server Extensions Installation Guide (EDCSY250400-IGD)*.

4.2 Updating the client configuration dictionaries

1. In client configuration, select **Data** > **Dictionary** from the menu bar.
2. Update the dictionaries as described in the following table.

Dictionary	Description
System aveva Config	Specify these values for the **...** key.
Key	Aveva (default)
Export XML Directory	Directory where AVEVA import process picks the Field Query XML file.
Trigger File Name	Name of the trigger file system that AVEVA uses to determine that a new insert will run.
Trigger File Location	Location of the trigger file for AVEVA.
Context ID	Name of the context assigned by AVEVA.
System AppServer Config	The values are set based on the application server installation batch file.
System ExportPackage	Provide the export path for the project packages.
System Parameters	Settings for the Distributed Task Runner defining the number of thread, threshold, Documentum CM Server, and shared_folder. Shared_folder must be a valid location that can be accessible on the Documentum CM Server where temporarily file can be saved.

4.3 Updating external widget URLs

If you have installed the OpenText Documentum CM for Engineering by using the `https` protocol, then you must update the URLs with https protocol in the following widgets:

- AO Config Guide: OpenText Documentum CM for Engineering
- AO Doc Coordinator Landing Page
- AO QRG Guide: OpenText Documentum CM for Engineering
- AO Reviewer Landing Page

4.4 Clearing the user preferences

Run the following DQLs after you install OpenText Documentum CM for Engineering on Documentum CM Server and Application Server:

- `delete d2c_preferences objects`
- `delete x3_preferences objects`

4.5 Enabling EPFMA logs

To set the log4j logs

1. Browse to log4j file from `<DOCUMENTUM_HOME>\tomcat10.x.xx\webapps\DmMethods\WEB-INF\classes\log4j2.properties` path.
2. Add the following details:

```
#-----------------EPFMA Logs--------------------

appender.EPFMA.type=RollingFile
appender.EPFMA.name= EPFMA
appender.EPFMA.filePattern=${filename}/EPFMA.log.%i.%d{yyyy-MM-dd}
appender.EPFMA.layout.type=PatternLayout
appender.EPFMA.fileName=C:/logs/EPFMA.log
appender.EPFMA.layout.pattern=%d{ABSOLUTE} %5p [%t] %c - %m%n
appender.EPFMA.policies.type=Policies
appender.EPFMA.policies.time.type=TimeBasedTriggeringPolicy
appender.EPFMA.policies.time.interval=1
appender.EPFMA.policies.time.modulate=true
appender.EPFMA.policies.size.type=SizeBasedTriggeringPolicy
appender.EPFMA.policies.size.size=10MB
appender.EPFMA.strategy.type=DefaultRolloverStrategy
appender.EPFMA.strategy.max=5

logger.EPFMA.name = com.documentum.epfma
logger.EPFMA.level = DEBUG
logger.EPFMA.additivity = false
logger.EPFMA.appenderRef.rolling.ref = EPFMA

logger.D2.name = com.documentum.d2
logger.D2.level = DEBUG
logger.D2.additivity = false
logger.D2.appenderRef.rolling.ref = EPFMA

logger.CDF.name = com.documentum.cdf
```

```
logger.CDF.level = DEBUG
logger.CDF.additivity = false
logger.CDF.appenderRef.rolling.ref = EPFMA

logger.UTILS.name = com.documentum.utils
logger.UTILS.level = DEBUG
logger.UTILS.additivity = false
logger.UTILS.appenderRef.rolling.ref = EPFMA

logger.OT.name = com.opentext
logger.OT.level = DEBUG
logger.OT.additivity = false
logger.OT.appenderRef.rolling.ref = EPFMA
```

Note: Restart the Java Method Server to reflect the new log setting.

4.6 Updating the connection config file

The Email account for Transmittal are managed by using the EPFM configuration file. For users of the previous release versions , the configurations defined in client dictionaries overrides the values defined in the EPFM config file.

The EPFM XML configuration file (`System Transmittal Connection Config`) is located at `System\EPFM\AO`.

The file contains the system connection details for the Email account.

System Email Config – Specify the following values for the Email key:

Parameters	Description
Host Name	The email server host name.
Port Number	The email server port number.
Encrypted Password	The encrypted password for the email account. Run the following command to retrieve the encrypted password: `java -cp .jar com.documentum.fc.tools.RegistryPasswordUtils<user_password>`
Is SSL	The true or false secure socket layer (SSL) value that depends on the email server configuration.
Is Start TLS	The true or false transport layer security (TLS) value that depends on the email server configuration.
SSL Protocol	The SSL protocol value that depends on the email server configuration.
SSL Socket Factory Class	The fully qualified class name for the SSL socket factory.

Parameters	Description
Is Socket Factory Fallback	The true or false value that depends on the email server configuration.
Username	The username for the mail server account that sends emails.
Requires Authentication	The true or false value that depends on the email server configuration.
Enable Send As	By default this value is set to `False`. Set this value to `True` whenever you want to send emails on behalf of other users. **Note:** Set the **Enable Send As** value to `False` if certain email servers restrict sending emails on behalf of other users.
Proxy Host	Specify the proxy host details of the mail server.
Proxy Port	Specify the proxy port details of the mail server.
Proxy Username	Specify the proxy username.
Proxy Pwd	Specify the proxy password.

Note: For more information about Email configuration, see "Email configuration checker" on page 33.

4.7 Installing and Configuring Reports

To enable and configure Reports, administrators must complete secure access and proper integration with the reporting framework. This includes enabling the license, importing reports configurations, configuring report options in the Client Configuration application, and updating permissions for the Reports Templates folder in Documentum Administrator to support controlled access and execution within the SmartView context.

4.7.1 Installing Reports

For more information about OpenText™ Documentum™ Content Management Reports installation, see *(EDCREP250400-IGD)*.

4.7.2 Enable License for Documentum Reports

To create documentum reports user:

1. For OpenText Documentum CM for Engineering application, create an OTDS user with the user name as **dctmreports** and keep the password as blank.
2. In OTDS, go to **Partition** > **Actions** > **Allocate to License**.
3. Select the **SYSTEM ACCOUNT** license.

   You must not consolidate this user.

To create reports admin user:

1. For OpenText Documentum CM for Engineering application, create an OTDS user with the user name as **Reports Admin** and keep the password as blank.
2. In OTDS, go to **Partition** > **Actions** > **Allocate to License**.
3. Select the required **X** plan and **Documentum.Eng** license

   You must consolidate this user.

4.7.3 Creating users in Documentum Administrator to access reports

You can configure the Reports users in Documentum Administrator to access the reports.

To view reports:

1. Log in to Documentum Administrator.
2. Open **Administration** > **User Management** > **Groups** > **dctm-reports-users**.
3. Go to **File** > **Add members**.
4. Add the newly created or existing user.
5. Log in to client with the user credentials and access the reports.

To create or edit report templates:

1. Open **Administration** > **User Management** > **Users**.
2. Select the **Reports Admin** user, right-click, and select **Assign Group Membership**.
3. Search for **dctm-reports-user group** and add it to the selected list using the right arrow.
4. Search for **dctm-reports-designer role**, add it to the selected list, and click **OK**.

5. Log in to the client with the user credentials and access the reports.

4.7.4 Verify the reports user in Documentum Reports

Login to OpenText Documentum CM for Engineering application with the newly created user credentials. For example: `https://<hostname>:<port>/D2-Smartview`

You can view the Documentum Content Management Reports workspace landing page.

4.7.5 Importing Reports configurations

Perform the following to import the Reports configurations:

1. Log in to client configuration with client configuration Administrator credentials.
2. Select **File > Import configuration** in the menu bar.
3. Navigate to the following path and select the Documentum Reports configuration zip file: `c:\<DTR 25.4 Install Directory>\OnPrem\dr_v25.4_for_d2_installation_package\D2_Components\D2_Config\DCTM-Reports-Application-25.4.0-Export-Config.zip`.
4. In the **Select elements to import** dialog box, select the following:
   - Full import without actual config reset
   - Do not overwrite the autonaming values in the new configuration
   - Do not overwrite cache URLs
   - Do not overwrite the mails server configuration
5. Click **OK**.
6. Restart the Java Method Server and client configuration application server.

4.7.6 Configuring Reports in client configuration

1. Log in to OpenText Documentum CM for Engineering client configuration application.
2. Select **Tools** > **Options** from the menu bar.
3. Select the **DCTM Reports Options** tab.
4. In the **DCTM Reports Configurations** pane, provide the following values:
   a. Core Application URL: Type a core application path. For example: `http://<fully qualified ingress host>dtr`
   b. Date Pattern: Type a date pattern. For example: `M/dd/yyyy hh:mm:ss a`

c. Framework: Type a framework value. For example: HTML5

d. Preview Line: Select this option to display reports execution results within the SmartView context.

4.7.7 Updating Reports Templates folder

1. Log in to Documentum Administrator with Administrator credentials.
2. Select **Cabinets** > **Templates**.
3. Right-click **DCTM Reports Templates** and select **Properties**.
4. In the **Properties** dialog box, select the **Permissions** tab.
5. Click **Select** permission set name.
6. In the **Choose a permission set** dialog box, search for **DCTM-Reports-Private-ACL**.
7. Select the **DCTM-Reports-Private-ACL** option.
8. Click **OK**.

4.8 Removing the conflicting JAR files

You can follow these steps to remove the conflict JAR files when both the Documentum for Capital Projects and OpenText Documentum CM for Engineering are installed on the same repository:

1. Stop the Java Method Server.
2. If you notice `mail.jar`, `LB.jar`, `LBJNI.jar`, and `dom4j-1.6.1.jar` in the following location, delete the JAR files.`%DOCUMENTUM%\tomcat10.x.x\webapps\DmMethods\WEB-INF\lib`.
3. Restart the Java Method Server.

4.9 Configuring the Documentum xPlore facets

Note: See *OpenText Documentum Content Management 25.4 Release Notes* for xPlore related support.

1. On the xPlore and IndexAgent hosts, stop xPlore IndexAgent and Search Server by stopping the following services:
   - On Microsoft Windows:
     - Documentum IndexAgent
     - Documentum xPlore PrimaryDsearch (Primary)
     - Documentum xPlore Watchdog –C –xPlore

2. Backup the xPlore configuration XML file located at:

   `<xPlore installation directory>/config/indexserverconfig.xml` = `*dsearch_home*/config/indexserverconfig.xml`

3. Open the file in a text editor and copy the content from `<unzipped installation package>\config\facets.txt` to the `*<path-value-index>*` element in the `*dftxml*` category.
   The section where you have to copy the content is in bold in the following code sample:

```
<category-definitions>
     <category name = "dftxml">
<indexes>
     <path-value-index...>
           copy content of facets.txt file here
      <path-value-index>
```

4. Save and close the file.
5. Restart the IndexAgent and Search Server services.
6. Verify that the IndexAgent service has started:
   a. Open a browser and browse to:

      http://<IndexAgent host>:9200/IndexAgent

   b. Log in using the IndexAgent credentials created when xPlore was installed.
   c. If the following warning appears, select **Start Index Agent in Normal Mode** and click **Submit**:

      Index Agent is stopped.

   d. Close the browser.
7. In client configuration, click **Interface** and select **Search**.
8. In xPlore engine options, select **Enable Facets**.

   For more information about *Configuring Advanced Search*, see *OpenText Documentum Content Management - Server Administration and Configuration Guide (EDCCS250400-AGD)*.

4.10 Rebuilding the Documentum xPlore indexes

Perform this procedure if there are documents in the repository and new facets have been added in the previous step. This procedure is not necessary for a new installation or when there are no changes to the facet configuration.

1. Open a browser and browse to the **Documentum xPlore Administration** tool:

   `http://<xPloreHostName>:9300/dsearchadmin`

2. Browse to `Data Management/<solution repository name>/default`
3. Click **Rebuild Indexes**.

The number of documents in the repository determines the duration to rebuild the indices. To avoid a lengthy index rebuild, decide on and configure facets before deployment. xPlore supports online indexing. In the event of a rebuild, users can continue to search during the rebuild. For more information about configuring facet indexes, see *OpenText Documentum xPlore 22.1 Administration and Development Guide*.

Note: If you notice any Foundation Java API client privilege to be approved message, you must approve by using the steps documented in "Registering clientFoundation Java API clients as privileged clients" on page 12.

4.11 Configuring the system for PDF rendering

To create PDF renditions, use Transformation Services – Documents. Transformation Services – Documents is part of the Transformation Services of Documentum CM Server products that perform transformations and analysis on repository content and thumbnail renditions.

See the *OpenText Documentum Content Management (CM) Transformation Services Administration Guide* for configuring Transformation Services – Documents.

Configure Transformation Services and Thumbnail Server to generate thumbnail renditions for document previews in client.

4.11.1 Enabling document types for rich media

Run the following query to enable rich media for repository document types:

```
update dm_format objects set richmedia_enabled=true where name like 'msw%'
```

4.12 Email configuration checker

Email configuration checker is an utility to verify the email configuration. This utility reads the email configuration defined in the `epfm_config.xml` email configuration file based on the domain and type specified and sends an email to the specified `local_repository_user`. If no email configuration is found based on the domain and type, by default system tries to read from `/EPFM/AO/System Transmittal Connection Config.xml` file.

The email configuration checker utility uses the domain and type to lookup the email configuration stored in `epfm_config`, and sends a test email to the account specified in `LOCAL_REPO_USERNAME`.

Use the following sample script to run the utility:

```
set LOCAL_REPOSITORY=<local docbase name>set LOCAL_REPO_USERNAME=<local docbase
installation owner name>
set LOCAL_REPO_PASSWORD=<local docbase installation owner password>
set DOMAIN=<Domain of email Configuration>
set TYPE=<ObjectType of the email configuration>
```

If the script is successful, an email is sent. Else, you can verify the log files in `buildpackage/logs/**_email.log`.

The following table lists the email parameters:

Parameter	Description
LOCAL_REPOSITORY	Specify the name of the repository.
LOCAL_REPO_USERNAME	Specify the installation owner user name to login to the repository where AO Connector must be installed.
LOCAL_REPO_PASSWORD	Specify the installation owner password to login to the repository where AO connector must be installed.
DFC_SHARED_DIR	Specify the location of the `Documentum Shared`.
DOMAIN	Specify the domain of the email configuration. For example, `AO`
TYPE	Specify the ObjectType of the email configuration. For example, `ao_transmittal`

To verify the email connection, see the *Configuring Email for Transmittal* section in the *OpenText Documentum Content Management for Engineering - Configuration Guide (EEGAM250400-CFD)*.

4.13 Modifying the alias for mailing lists and emails

The OpenText Documentum CM for Engineering solution defines an alias, `ao_appserver`, to maintain `app-server name`, `port`, and `webapp name` that are used in dynamically constructing document link (DRL) in an email or mailing list. These aliases must be updated with proper values based on the environment.

To update the alias for mailing lists and emails

1. Log in to **Documentum Administrator**. You must log in with a user name that contains the administrative privileges.
2. Browse to the **Administration/Alias Sets** node.
3. Select the **ao_appserver** alias, right-click and select **Alias Set Properties**.
4. Browse to **Aliases** tab.
   - Select the **name** alias and modify it to enter a correct application server **hostname** or **IP** value.
   - Select the **port** alias and modify it to enter a correct application server port value.

- Select the **webapp** alias and modify it to enter a correct client Web application name.

5. Click **OK**.

4.14 Configuring Brava parameters in Application Server

Classic View

You must update the following parameters in `...\<apache-tomcat-10.x.x>\webapps\D2\igc\brava_parameters.properties` file for comment consolidation.

```
EnableMarkupConsolidate = TRUE
EnableConsolidateIfMarkupOpenedForEdit = TRUE
html.markupsFeature.EnableCommonOwnership = TRUE
html.enable.Markup.changeOwner = TRUE
html.markup.enable.consolidate.changeownership.with.permission.higher.
than = 4
```

Smart View

You must update the following parameters in `...\<apache-tomcat-10.x.x>\webapps\D2-Smartview\ui\igc\brava_parameters.properties` file for comment consolidation.

```
EnableMarkupConsolidate = TRUE
html.markupsFeature.EnableCommonOwnership = TRUE
html.enable.Markup.changeOwner = TRUE
html.markup.enable.consolidate.changeownership.with.permission.higher.
than = 4
```

4.15 Setting up Blazon on Windows

Perform the following steps for burn-in of comments on PDF using Blazon:

1. Log in to the client configuration with Administrator credentials.
2. Browse to **D2** > **Dictionary** > **Transmittal Comment Config**.

   In the **Alias** tab, update **URL**, **Time Out**, **Source Location**, and **Publish Location**.
   For example,
   ```
   URL = http://<Blazon Server Hostname>:8090/QueueServer/
   push.aspx
   Time Out = 180000
   Source Location=\\<Blazon server IP>\BlazonDirs
   Publish Location=\\<Blazon server IP>\BlazonDirs
   ```

   Note: You must use the same folder for Source and Publish location.

You must ensure that you access the `BlazonDirs` folder from Documentum CM Server by providing the login credentials and also save the credentials.

You must ensure that `BlazonDirs` folder is granted shared access with the Documentum CM Server and application server machines.

3. Save the updated content.
4. Restart the Documentum CM Server and application server.

4.16 Setting up Blazon on Linux

Perform the following to configure Blazon:

1. Log in to the client configuration with Administrator credentials.
2. Browse to **D2 > Dictionary > Transmittal Comment Config**.
3. In the **Alias** tab, update **URL**, **Time Out**, **Source Location**, and **Publish Location**.
   For example,
   ```
   URL = http://<Blazon Server Hostname>:8090/QueueServer/push.aspx
   Time Out = 180000
   Source Location=/mnt/blazon
   Publish Location=c:\BlazonDirs
   ```
   You must ensure that /mnt/blazon path is mounted on Blazon server directory.

   Use the following command to mount the drive:
   ```
   mount -t cifs -o username=<Login user of Blazon server>,password=<password>, uid=<UID of Asset Operations Administrator> ,dir_mode=0777,file_mode=0777,nounix //<Blazon Server Hostname>/BlazonDirs /mnt/blazon
   ```
4. Publish location directory from Blazon server must be shared with Linux environment.

   For example: `Publish Location = c:\BlazonDirs`
5. Restart the Documentum CM Server and application server.

4.17 Configuring DateFormat in coversheet template

Perform the following to configure date time format in Transmittals coversheet template:

1. Browse to `AO Transmittal CoverSheet Template.docx` file in AO Repository.
   For example: `Repository>AO Library>Templates>Content Templates`
2. In the docx file, you can configure Issue or Sent Date and Return or Due date format.
3. In the `${tr.out.ao_date_sent@dd MMM yyyy}` or `${tr.out.ao_date_due@dd MMM yyyy}` expressions, you can configure the date time format after the @ symbol.

The supported date and time formats are based on the SimpleDateFormat Java class.

4. Follow the same steps for configuring date time format for the Project Transmittal coversheet template in English and Spanish language.

Chapter 5

Upgrading OpenText Documentum CM for Engineering from 25.2 or previous supported release to 25.4

You must upgrade your existing OpenText Documentum Content Management environment with OpenText Documentum Content Management 25.4 using the steps documented in the *OpenText Documentum Content Management - On-Premises Upgrade and Migration Guide (EDCCS250400-UMD)*.

Also, you must upgrade your existing OpenText Documentum Content Management client environment to OpenText Documentum Content Management client (D2) 25.4 by using the steps documented in the *Upgrading the client on Documentum Server* chapter in *OpenText Documentum Content Management - Client Installation Guide (EDCCL250400-IGD)*.

Note: Before upgrading OpenText Documentum Content Management you must change OpenText Documentum Content Management AEK passphare to meet Password Complexity Rules. For more information, see *OpenText Documentum Content Management - On-Premises Upgrade and Migration Guide (EDCCS250400-UMD)*.

You cannot migrate from one operating system or database to another. For example: Solaris to Linux. You must contact the Professional Services team for operating system or database migration.

The following table describes the possible upgrade paths for OpenText Documentum CM for Engineering:

Existing version	Possible upgrade version	Reference document
20.2.2	20.4	Documentum for Asset Operations 20.4 Installation Guide
20.4	21.2	Documentum for Asset Operations 21.2 Installation Guide
21.2	21.3	Documentum for Asset Operations 21.3 Installation Guide
21.3	22.1	Documentum for Asset Operations 22.1 Installation Guide

Existing version	Possible upgrade version	Reference document
16.4	22.1	Documentum for Asset Operations 22.1 Installation Guide
22.1	22.4	Documentum for Asset Operations 22.4 Installation Guide
22.4	23.2	Documentum for Asset Operations 23.2 Installation Guide
23.2	23.4	Documentum for Asset Operations 23.4 Installation Guide
23.4	24.2	Documentum for Asset Operations 24.2 Installation Guide
24.2	24.4	Documentum Content Management for Engineering 24.4 Installation Guide
24.4	25.2	Documentum Content Management for Engineering 25.2 Installation Guide
25.2	25.4	Documentum Content Management for Engineering 25.4 Installation Guide
20.4	25.4	Documentum Content Management for Engineering 25.4 Installation Guide

For more information about system requirement details, see *OpenText Documentum Content Management for Engineering 25.4 Release Notes*.

5.1 Preparing for the upgrade

OpenText Documentum CM for Engineering 25.4 contains changes in the data model that requires you to back up the client configuration.

1. Perform the following steps to back up your OpenText Documentum CM for Engineering 25.2 or any previous supported release client configuration:

   a. In the client configuration, select **File > Export configuration**.
   b. In the **Applications** list, select **All elements** and click **OK**.
   c. Select **Full config export**.
   d. Click **OK**.

2. Export any extended or custom configurations you have along with all the workflow and autonaming configurations.

a. In client configuration, select **File > Export configuration**.
b. Select **All elements**.
c. Click **OK**.
d. Select all the workflow and autonaming configurations.

   You must select all extended or custom configurations.

   Note: Any configuration that you do not export will not be available after the upgrade process.

3. Run the following DQL query and save or export the query result to view the order of the available contexts:

```
select r_object_id, object_name, order_no, parent_names, parents_config,
parent_order_no, dql_where, group_name, title, lock_config from d2_documentset
order by order_no
```

4. The following are the new changes from OpenText Documentum CM for Engineering 22.4 release:

   - Process builder and workflow manager is not supported - You must use Workflow Designer for creation and installation of OpenText Documentum CM for Engineering workflows.
   - Your existing OpenText Documentum CM for Engineering workflows must be migrated and installed by using Workflow Designer. See *OpenText™ Documentum™ xCelerated Composition Platform User Guide* for migrating the workflows and exporting them as a package before upgrading the environment.

     Workflows that are built using Documentum Workflow or Process Builder Manager are not compatible with workflows that are built using Workflow Designer.
   - Workflow Designer has a migration tool for legacy Workflow Designer built workflows, but it does not migrate the client configuration information.

     To migrate client configuration, you can use **d2workflowconfigmigration** utility that exists at **D2-Config\utils**.

OpenText Documentum Content Management (CM) Workflow Designer 24.4 release onwards, Workflow Designer requires you to run a migration tool if the Workflow templates are customized and versioned.

For more information, see *OpenText™ Documentum™ xCelerated Composition Platform User Guide*.

5.2 Run InstallAOProjectsOnCS installer

Perform the steps documented in the "Installing components on OpenText Documentum CM" on page 16 section.

5.3 Importing and Installing the workflows

Perform the steps documented in "Installing workflows using Documentum Content Management Workflow Designer" on page 18.

5.4 Run InstallAOProjectOnAS installer

After you back up the client configuration, you can run the `InstallAOProjectOnAS` installer on the application server to install OpenText Documentum CM for Engineering - specific client configuration and perform post configuration updates. Refer to the steps documented in "Installing on Application Server" on page 19 for updating the `InstallAOProjectOnAS.bat` file.

Note: This upgrade step will reset the existing client configuration. If you want to overwrite the existing client configuration, refer to "Run InstallAOProjectOnAS installer with overwrite option" on page 42.

After you complete the installation, refer to the saved query and verify the context order. In addition, you can perform the required changes for your customized configurations.

5.4.1 Run InstallAOProjectOnAS installer with overwrite option

Use the **Full Import with Overwrite (without a reset)** option to install client configuration on an existing configuration. By default, AO Installer uses **Full Import with Overwrite (with reset)** option.

1. Browse to the Config folder.
2. Locate the **deploy_package.xml** file.
3. Select the **macrodef name="deploy.process.command.ao_d2_config_import"** tag.
4. In this tag, select **com.emc.d2.api.config.batch.D2ConfigImport** classname.
5. Set the **-reset** value to **false**.

5.5 Post-upgrade

5.5.1 Licensing OpenText Documentum CM for Engineering

OpenText Documentum CM uses OpenText™ Directory Services (OTDS to apply licenses for all the OpenText Documentum CM components. For more information about procuring the license file and configuring OTDS and license, see *OpenText Documentum Content Management - On-Premises Upgrade and Migration Guide (EDCCS250400-UMD)*.

5.5.2 Post-upgrade steps

If there are any additional customer specific client configuration and creation profiles that were created dynamically during Project creation in Active Projects. Then, you must import:

- Customer specific client configuration
- Creation profile of existing Active Projects

Note: You must compare the backed up version of the client configuration and the latest version of client configuration for differences before you perform the following steps.

1. In the client configuration, select **File > Import Configurations**.
2. Select the following options:
   - **Overwrite existing elements**
   - **Do not overwrite auto-naming values in the new configuration**
   - **Do not overwrite cache URLs**
   - **Do not overwrite the mail servers configuration**
3. In Dictionary section, select **Asset PO Number**.
4. In Creation profile section, select the required profiles. For example, ProjectName-ProjectTitle

5.6 Updating the external project documents state

This is applicable only when you upgrade OpenText Documentum CM for Engineering from 16.4 to 22.1 version. You can update the external project document state from As Submitted to Placeholder state.

Note: From OpenText Documentum CM for Engineering 16.6 and later versions, Project External Document's initial lifecycle state was changed from **As Submitted** to **Placeholder** state.

To update the external project documents state

1. Log in to Documentum Administrator with administrator credentials.
2. Browse to **Tools** > **Dql** editor.
3. Execute the following query in DQL editor to retrieve the count of project external documents which are in **As Submitted** state.

```
select count(*) as Document_Count from ao_document where a_status='As Submitted'
and document_type='Project Document'
and ao_doc_type_classification='External'
```

4. If the **Document_Count** is one or more, execute the following query in DQL editor to change the lifecycle state from **As Submitted** to **Placeholder**.

```
update ao_document objects set a_status='Placeholder' where a_status='As Submitted'
and document_type='Project Document'
and ao_doc_type_classification='External'
```

5. Execute the following the query to check if the status of the documents are changed from **As Submitted** to **Placeholder**. You must ensure that the count is zero.

```
select count(*) as Document_Count from ao_document where a_status='As Submitted'
and document_type='Project Document'
and ao_doc_type_classification='External'
```

5.7 Installing and configuring Documentum Reports

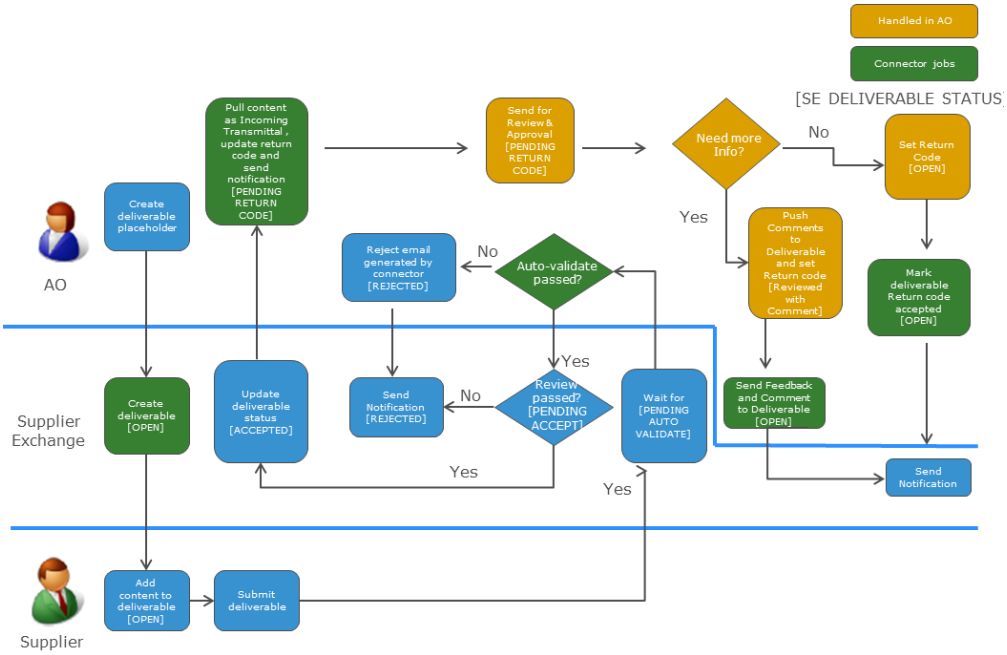
To install and configure Documentum Reports, see "Installing and Configuring Reports" on page 28.

Chapter 6

Installing OpenText Documentum CM for Engineering Connector

6.1 Overview

OpenText Documentum CM for Engineering Connector for Core Collaboration for Engineering automates the tasks of sharing, reviewing, and approving supplier contracted deliverables and transmittals. OpenText Documentum CM for Engineering Connector provides the Send to supplier action to create collaboration spaces organized by project and contract. The owner operator and invited suppliers post deliverables and discussions and share reference materials. Supplier posted deliverables transfer to the operations repository for review and approval. The captured feedback is sent back to Core Collaboration for Engineering with notification to suppliers.
The following diagram illustrates the Core Collaboration for Engineering workflow:



6.2 Preparing for installation

To prepare for installation:

1. Download the OpenText Documentum CM for Engineering connector package from the OpenText My Support (support.opentext.com).
2. Extract the connector package to a temporary installation location. For example:

   Windows: `C:\temp\<connector folder>\`

Note: OpenText Documentum CM for Engineering must be installed before installing OpenText Documentum CM for Engineering Connector.

6.3 Installing on OpenText Documentum Content Management

When you execute OpenText Documentum CM for Engineering Connector bat file, the executable file deploys the xChange Repository Components, xChange AO Repository Components, installs Core Collaboration for Engineering RSA root certificate and runs a set of DQL queries.

Windows Environment

1. Browse to the relevant batch file corresponding to the OpenText Documentum Content Management version:

   - `InstallAOSupplierExchangeOnCS.bat` for OpenText Documentum Content Management.

     For example, `C:\temp\<connector folder>\InstallAOSupplierExchangeOnCS.bat`

2. Open the file in a text editor and specify parameter values for your environment. For example:

```
set LOCAL_REPOSITORY=AssetOps20
set LOCAL_REPO_USERNAME=Administrator
set LOCAL_REPO_PASSWORD=Password@123
set GLOBAL_REPOSITORY=AssetOps20
set GLOBAL_REPO_USERNAME=Administrator
set GLOBAL_REPO_PASSWORD=Password@123
set CONTENT_SERVER_VERSION=25.4
set SEVERSION= v2
```

   If `DFC_SHARED_DIR` contains whitespace then enclose within double quotes. For example:

```
set "DFC_SHARED_DIR=C:\Program Files\Documentum\Shared"
```

   For example: `set DFC_SHARED_DIR=C:\Documentum\Shared`

   Add the following mandatory Core Collaboration for Engineering site details:

Note: You must not provide `XCHANGE_PROXY_HOST` and `XCHANGE_PROXY_PORT` details in `InstallAOSupplierExchangeOnCS.bat` and proceed with installation if you see`Unable to tunnel through proxy_host:proxy_port . Proxy returns "HTTP/1.1 503 Service Unavailable` error.

```
set XCHANGE_URL = <Type the Supplier Exchange v2 URL address>

For example, set XCHANGE_URL = https://xchange-aotest.opentext.com

set XCHANGE_KEY_ID = <Provide the client ID>

For example,set XCHANGE_KEY_ID = 220c7fea-857d-476c-a085-346e0f798b28

set XCHANGE_PRIVATE_KEY = <Provide the client secret>

For example,set XCHANGE_PRIVATE_KEY = bf8d78a1138a487d821120071bad02b9
set XCHANGE_SUBSCRIPTION_NAME = <Provide the subscription name>
For example, set XCHANGE_SUBSCRIPTION_NAME=suppex
set XCHANGE_PROXY_HOST = <Provide the proxy host- Only if proxy server is
configured. Else, retain this as blank>
For example, set XCHANGE_PROXY_HOST = 127.0.0.1

set XCHANGE_PROXY_PORT = <Provide the proxy port - Only if proxy server is
configured. Else, retain this as blank>

For example, set XCHANGE_PROXY_PORT = 8888
```

```
set JAVA_HOME = <Provide JAVA_HOME bin location path>

For example, set JAVA_HOME = %JAVA_HOME%\bin
```

Note: Refer to *Configuring OpenText Documentum CM for Engineering Connector for Core Collaboration for Engineering* chapter in *OpenText Documentum Content Management for Engineering - Integration Guide (EEGAM250400-ING)* for generating Core Collaboration for Engineering V3 **Subscription**, **Client ID**, and **Client Secret** details.

3. AO Connector shares some common libraries that are used in Capital Projects. If Capital Projects is already installed on the Documentum CM Server, you can configure the installer to avoid re-installation of the shared libraries. To exclude these steps, you must perform the following:

   1. Browse to `<AO Connector extracted location>/config/xChange_install`
   2. In the `install_package_config.xml` file, un comment the following `release_package_config/repository_config` section.

      ```
      <copy source="${packagebasedirabsolute}/${pkg.cs.excl.cp.lib.dir}"
      target="${jboss.dmmethods.lib.dir}" fileset="jar" />
      ```

   3. Comment the following section:

      ```
      <copy source="${packagebasedirabsolute}/${pkg.cs.lib.dir}"
      target="${jboss.dmmethods.lib.dir}" fileset="jar" />
      ```

4. Run the `InstallAOSupplierExchangeOnCS.bat`. You can view the `<Connector build>/log` or console output for the installation progress.

5. Stop all OpenText Documentum CM services and clear the Documentum CM Server cache.

6. Start all the OpenText Documentum CM services and application server.

6.4 Installing OpenText Documentum CM for Engineering Connector on Linux

The `InstallAOSupplierExchangeOnCS.sh` script installs the Composer DARs and scripts, and copies the necessary libraries to the Java Method Server.

Perform the following steps to install OpenText Documentum CM for Engineering Connector on Linux:

1. Before starting the installation, verify the following:
   - Documentum CM Server is 25.4
   - Java Method Server is stopped
   - The latest version of Composer is installed
   - The repository is running.
   - The following files in the unzipped installation package have the execute permission:

     `<unzipped installation package>/*.sh`
2. Run the `chmod` command on the `InstallAOSupplierExchangeOnCS.sh` file.
3. Open a terminal window and browse to the unzipped installation package.
4. Open the `InstallAOSupplierExchangeOnCS.sh` by using an editor.
5. Update the following argument according to your environment.

```
LOCAL_REPOSITORY=<local docbase name>For example, set LOCAL_REPOSITORY=AssetRepo
LOCAL_REPO_USERNAME=<local docbase installation owner name>For example, set
LOCAL_REPO_USERNAME=AssetOpsLOCAL_REPO_PASSWORD=<local docbase
installation owner password>
For example, set
LOCAL_REPO_PASSWORD=Password@123GLOBAL_REPOSITORY=<global
docbase name>

For example, set GLOBAL_REPOSITORY=AssetRepo
GLOBAL_REPO_USERNAME=<global docbase installation owner name>

For example, set GLOBAL_REPO_USERNAME=AssetOps
GLOBAL_REPO_PASSWORD=<global docbase installation owner password>

For example, set GLOBAL_REPO_PASSWORD=Password@123
CONTENT_SERVER_VERSION=<Documentum Server version>

For example,
set CONTENT_SERVER_VERSION=25.4
```

Note: You must ensure that the DFC_SHARED path is appropriate.

```
XCHANGE_KEY_ID = <Provide the client ID>
```

```
For example, XCHANGE_KEY_ID = 220c7fea-857d-476c-a085-346e0f798b28
XCHANGE_PRIVATE_KEY = <Provide the client ID>
For example, XCHANGE_KEY_ID = 220c7fea-857d-476c-a085-346e0f798b28

XCHANGE_PRIVATE_KEY = <Provide the client secret>

For example,set XCHANGE_PRIVATE_KEY = bf8d78a1138a487d821120071bad02b9

XCHANGE_SUBSCRIPTION_NAME = <Provide the subscription name>

For example, set XCHANGE_SUBSCRIPTION_NAME=suppex

XCHANGE_PROXY_HOST = <Provide the proxy host- Only if proxy server is
configured. Else, retain this as blank>

For example, XCHANGE_PROXY_HOST = 127.0.0.1
XCHANGE_PROXY_PORT = <Provide the proxy port - Only if proxy server is
configured. Else, retain this as blank>

For example, XCHANGE_PROXY_PORT = 8888

JAVA_HOME = <Provide JAVA_HOME location path>

For example, JAVA_HOME = %JAVA_HOME%
```

Note: Refer to Configuring OpenText Documentum CM for Engineering Connector for Core Collaboration for Engineering chapter in *OpenText Documentum Content Management for Engineering - Integration Guide (EEGAM250400-ING)* for generating Core Collaboration for Engineering V3 Subscription, Client ID, and Client Secret details.

6. Click **Save**.
7. Run one of the following commands:
   a. `sh InstallAOSupplierExchangeOnCS.sh`
   b. `./InstallAOSupplierExchangeOnCS.sh`
8. Verify the log files and ensure that there are no errors.
9. Stop all OpenText Documentum CM services.
10. Clear the Documentum CM Server cache.
11. Start all the OpenText Documentum CM services and application server.

6.5 Configuring Transformation Services for PDF rendition

Perform the following steps to configure the Transformation Services for generating the PDF rendition for Microsoft Word document (docx). To generate the PDF rendition for other formats, you can follow the same steps.

Use Documentum Administrator to run the following query to enable the rich media for a Microsoft Word Document:

```
update dm_format objects set richmedia_enabled=1 where name like 'msw%'
```

1. In Transformation Services, go to `c:\Documentum\CTS\config` and locate the `CTSProfileService.xml` file.
2. In the `CTSProfileService` file, locate `ForClient` element and verify the existing value for the OpenText™ Documentum™ Content Management repository. Here, you can find XCP or any other legacy value.
3. Using Documentum Administrator, go to `System\Media Server\System Profiles` folder and update the respective client files based on the `For Client` values.

   For example: For XCP client value, update the `Register_xcp` XML file and in the format element, add the following:

   ```
   <Format source="msw" target="msw"/>
   ```

   In `Document_Registration` XML file add the following:

   ```
   <Format source="msw" target="pdf"/>
   ```

   Note: Add `msw8` for Microsoft Word 2016. Likewise, you can enable rendition for other formats.

   In `Document_to_pdf` XML file add the following:

   ```
   <Format source="msw" target="pdf"/>
   ```

4. In Transformation Services, go to `c:\Documentum\CTS\config` and locate the `FormatMapperService` XML file.

   - Verify if your document format is added. Otherwise, add the required format. For example:

     ```
     <FormatMapper CTSFormat="doc" DocumentumFormat="msw"/>
     ```

5. To make the rendition settings active, restart the repository.
6. Restart the Transformation Services.

6.6 Enabling connector logs

To set the log4j connector logs:

1. Browse to log4j2 file from `<DOCUMENTUM_HOME>\tomcat10.x.xx\webapps\DmMethods\WEB-INF\classes\log4j2.properties` path.
2. Add the following details:

```
#------------------- ao connector-------------------------

appender.XCHANGE.type=RollingFile
appender.XCHANGE.name= XCHANGE
appender.XCHANGE.filePattern=${filename}/aoconnector.log.%i.%d{yyyy-MM-dd}
appender.XCHANGE.layout.type=PatternLayout
appender.XCHANGE.fileName=C:/Documentum/tomcat10.x.xx/logs/aoconnector.log
appender.XCHANGE.layout.pattern=%d{ABSOLUTE} %5p [%t] %c - %m%n
appender.XCHANGE.policies.type=Policies
appender.XCHANGE.policies.time.type=TimeBasedTriggeringPolicy
appender.XCHANGE.policies.time.interval=1
appender.XCHANGE.policies.time.modulate=true
appender.XCHANGE.policies.size.type=SizeBasedTriggeringPolicy
appender.XCHANGE.policies.size.size=10MB
appender.XCHANGE.strategy.type=DefaultRolloverStrategy
appender.XCHANGE.strategy.max=5

logger.XCHANGE.name = com.emc.eix.ao
logger.XCHANGE.level = DEBUG
logger.XCHANGE.additivity = false
logger.XCHANGE.appenderRef.rolling.ref = XCHANGE

logger.EIX.name = com.emc.eix
logger.EIX.level = DEBUG
logger.EIX.additivity = false
logger.EIX.appenderRef.rolling.ref = XCHANGE

logger.XCPCLIENT.name = com.emc.xcpclient
logger.XCPCLIENT.level = DEBUG
logger.XCPCLIENT.additivity = false
logger.XCPCLIENT.appenderRef.rolling.ref = XCHANGE

logger.ECS.name = com.ecs
logger.ECS.level = DEBUG
logger.ECS.additivity = false
logger.ECS.appenderRef.rolling.ref = XCHANGE

logger.EIF.name = com.eif
logger.EIF.level = DEBUG
logger.EIF.additivity = false
logger.EIF.appenderRef.rolling.ref = XCHANGE

logger.HTTP.name = com.emc.documentum.http
logger.HTTP.level = DEBUG
logger.HTTP.additivity = false
logger.HTTP.appenderRef.rolling.ref = XCHANGE
```

Note: Restart the method server to reflect the new connector log settings.

6.7 Configuring repository file formats

The document file formats that you plan to use in Core Collaboration for Engineering requires a *mime_type* update on the *dm_format* type before the *mime_type* can be resolved in Core Collaboration for Engineering.

By default, OpenText Documentum CM for Engineering Connector supports common file formats such as `docx, excel, CAD, jpeg, png, gif`.
For additional formats, you must run the following DQL command to update the *mime_type* to match the values provided in Appendix B.

1. In Documentum Administrator, select **Tools** > **Dql Editor**.
2. Run the DQL command for each file format that you want to support.

   The following example shows the command for configuring the repository to support Microsoft Word documents with a docx extension:

   ```
   CREATE dm_format OBJECT SET name = 'msw14', SET description = 'Microsoft
   Word document', SET dos_extension = 'docx', SET mime_type = 'application/
   vnd.openxmlformats - officedocument.wordprocessingml.document'
   ```

3. Click **Execute**.

Chapter 7

Verifying the Core Collaboration for Engineering connection

After the OpenText Documentum CM for Engineering Connector is installed successfully, you can use the Core Collaboration for Engineering utility to verify the Core Collaboration for Engineering connection details in the `\System\EPFMA\AO\SystemConnectionconfig.xml` file from the target repository.

Windows Environment

Perform the following steps in Windows environment:

1. Browse to the relevent batch file on the Documentum CM Server.
   For example: `C:\temp\<connector folder>\SupplierExchangeConnectionCheck.bat`
2. Open the file in a text editor and specify parameter values for your environment.
   For example:

   ```
   set LOCAL_REPOSITORY=<Name of target repository>
   set LOCAL_REPO_USERNAME=<Name of admin repo user>
   set LOCAL_REPO_PASSWORD=<Password of admin user>
   ```

   If `DFC_SHARED_DIR` contains whitespace then enclose within double quotes. For example:

   ```
   set "DFC_SHARED_DIR=C:\Documentum\Shared"
   ```
3. Save the changes.
4. Run the `SupplierExchangeConnectionCheck.bat` in a command prompt. The command prompt displays the connection status.

Chapter 8

Troubleshooting

Problem	Cause	Resolution
During OpenText Documentum CM for Engineering upgrade, Java returned 13 error messages.	Unable to instantiate the necessary java class: `com.documentum.bpm.impl.DfProcessEx`	Stop all the Documentum processes and restart the Documentum CM Server.
Auto rendering of the PDF format does not work for the new templates.	Transformation Services does not support `msw12me` format.	Configure `register.xml` and `register_legacy.xml` and add entry for `.docx (msw12)` and `.docm (msw12me)` format document.
You may notice no JMS available error when you install OpenText Documentum CM for Engineering.	Could occur due to cache in JMS.	Restart repository and JMS.
When you run `install*.bat` in command prompt, you may notice an unable to locate the file error message.	The file may contain non-window characters.	Perform the following steps: 1. Open the bat file by using Notepad++. 2. Select **Edit > EOF Conversion > Windows Format**. 3. Click **Save**.

Problem	Cause	Resolution
Configure the Installer to avoid installing the dar file.	None	Perform the following steps: 1. Locate the `install_package_config.xml` in the extracted install package. For example: **EPFM-AO-XX.X.XXXX\config\install-ao-20.4\install_package_config.xml** 2. Open the file in Notepad ++. 3. Locate the first tag that begins with `<dar_ref`, then insert a new line before this and type `<!--`. 4. Locate the last tag that ends with `</dar_ref>`, then insert a new line after this line and type `-->` 5. Save the file. 6. Re-run the `install.bat` file.
The Business Process Manager is not starting due to `java.lang.NoSuchMethodError: com.rsa.jsafe.CryptoJ.isNativeAvailable` error in Java Method Server.	The `dfc.keystore` file is corrupt.	Add `dfc.security.keystore.file =/home/dmadmin/dctm/config/dfc.keystore` entry in `dfc.properties` file. The file is available here: `$Documentum_Home/config of Content Server`
Installation or upgrade fails on Documentum CM Server due to a DQL error that are related to `dm_dbo.ao_action_menu`, `dm_dbo.ao_aveva_attr_mapping`, and `dm_dbo.ao_mobile_attr_mapping` tables.	A `dm_registry` entry is created whenever you run the install script.	Before installation, run the following queries: • `unregister table dm_dbo.ao_action_menu` • `unregister table dm_dbo.ao_aveva_attr_mapping` • `unregister table dm_dbo.ao_mobile_attr_mapping` Run the installation script again.

Problem	Cause	Resolution
AO Workflows stops working after Process Engine Upgrade.	The `bpm.ear` is redeployed as part of upgrade and as a result the AO jars gets deleted.	The `EPFMA-AN-Integration.jar`, `CDF-Methods.jar`, `CDFBase.jar`jars are deployed by the OpenText Documentum CM for Engineering-Documentum CM Server Installer. When the Process Engine is upgraded after OpenText Documentum CM for Engineering is installed, you must copy the jars manually to the `bpm.ear` path. For Documentum CM Server 21.3, the `bpm.ear` path is: `C:\Documentum\tomcat 9.0.43\webapps\bpm\WEB-INF \lib`
When you run the `InstallAOProjectOnCS.bat` the installer throws the following message: … `\config\deploy_package.xml:725: The system cannot access the configuration file C:\… \EPFMA-AO-21.3.0xxx\ config//install_ package_config.xml`.	Unicode characters gets added accidentally when editing the `InstallAOProjectOnXX.bat` file.	1. Use an open source editor such as **Notepad++** to open the `InstallAOProjectOnXX.bat` file. 2. In **Notepad++**, enable **Show All Characters**. 3. Search for `\r` and replace with `\r\n`.
During OpenText Documentum CM for Engineering upgrade, when the installer fails or if certain configurations are not deployed due to environment issues.		1. In the client configuration, select **File > Import Configurations(D2–Config)**. 2. Select the following option: **Do not overwrite email server config** 3. After you complete the client configuration installation, you must run the `InstallAOProjectOnAS` with `SKIP_D2CONFIG_ INSTALL=true` to complete the post the client configuration updates.

Problem	Cause	Resolution
Incorrect error message occurs while creating document if active content template is not available.	User may get this error whenever either an Effective Content template is not available in the Facility or the Creation Profile is not created for the Project.	Use an Effective Content template for the Facility or Ensure that Creation Profile is created for the Project.
Unable to view the Landing page.	User may not have updated the application server address in the client configuration.	In **Asset Operations > Tools > Widget**, select the AO Doc Coordinator Landing Page widget and update the IP address details in **widget url** field.