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OpenText™ Documentum™ Connector for Core Share

User Guide

Publish content from the repository to OpenText™ Core Share.

OpenText™ Documentum™ Connector for Core Share
User Guide
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Chapter 1

Overview

OpenText Documentum Connector for Core Share is a clip-on system to OpenText™ Documentum™ Content Management Server to expose authorized content from the OpenText™ Documentum™ Content Management repository to OpenText Core Share. When Documentum Connector for Core Share is installed with OpenText Documentum CM, it enables the consumption of content by external collaborators, on multiple channels of Web, Mobile, and Desktops through the cloud. In addition, to automatically publish the content for collaboration, Documentum Connector for Core Share will also allow users of integrated OpenText Documentum CM client applications to manually choose content and share with preferred collaborators on OpenText Core Share.

Documentum Connector for Core Share also includes two-way synchronization capabilities to ensure the changes that happen to a shared content on OpenText Core Share, can be synchronized back to OpenText™ Documentum™ Content Management repository.

Chapter 2

Global Settings

2.1 Using the Global Settings tab

Sign in to Documentum Connector for Core Share with the following URL `https://`*`<hostname>`*`:`*`<port>`*`/syncagent`.

Use the **Global Settings** tab to set up the following two accounts required by Documentum Connector for Core Share:

- Documentum CM Server repository superuser account
- OpenText Core Share tenant account

The **Source Repository (Repository superuser account)** is an existing OpenText Documentum CM account. This account must belong to the group *dmc_sync_users*. The Connector requires the superuser account to publish files from the repository. You cannot create or modify a repository superuser account using this tab.

Documentum Connector for Core Share supports both Basic and OpenText™ Directory Services (OTDS) authentication type to register source repository with Documentum CM Server from version 24.2 and later.

To configure this account, click **Edit**, provide the following information in the **Repository Account Credentials** dialog box based on the authentication type , and click **Save**:

- OTDS authentication type: This is the default authentication type.

  - OTDS user **Sign-in name**
  - OTDS user **Password**
  - OTDS **Auth Type** from the list
  - **OTDS URL**: `http://`*`<host>`*`:`*`<port>`*`/otdsws/oauth2/token`
  - **Client ID** created in OTDS

    > 📄 **Note:** Register Documentum Connector for Core Share on OTDS and generate Client ID. For example, `dcc_oauth_client`. Documentum Connector for Core Share supports grant type as `password`. To achieve this, clear the **Confidential** check box while creating Client ID on OTDS. For more information, see *OpenText Directory Services - Installation and Administration Guide (OTDS250200-IWC)*.

  - **Documentum URL**: OTDS-enabled Client REST API URL
  - **Repository** from the list (populated based on the specified OTDS-enabled Client REST API URL)

📄 **Note:** Client REST API must be pointing to same repository while upgrading from Basic to OTDS authentication type.

- Basic authentication type:

  – Documentum CM Server superuser **Sign-in name**

  – Documentum CM Server superuser **Password**

  – Basic **Auth Type** from the drop-down list

  – **Documentum URL**: OpenText™ Documentum™ Content Management Foundation REST API URL

  – **Repository** from the list (Populated based on the specified OpenText Documentum CM URL)

  📄 **Note:** The Documentum CM Server superuser account must belong to the group `dmc_sync_users`. If the account does not belong to the `dmc_sync_users` group, then add the user to the group using the Documentum Administrator client.

The **Target Repository (OpenText Core Share tenant account)** is the OpenText Core Share Enterprise Edition account that manages the shared folders. You cannot create or modify a OpenText Core Share account using this tab.

To configure OpenText Core Share tenant account, complete the following steps:

1. Click **Edit**.

2. Specify the OpenText Core Share Endpoint URL, Client ID, and Client secret generated in OpenText Core Share.

   📄 **Note:** *OpenText Documentum Connector for Core Share - Installation Guide (EDCCOCDFS250200-IGD)* provides information to generate the Client ID and Client secret.

3. Click **Sign In**.

4. Specify the OpenText Core Share tenant account credentials in the OpenText Core Share Sign-in screen.

   📄 **Note:** Use OpenText Core Share Enterprise Edition account. Ensure that it is an account dedicated for use by the Documentum Connector for Core Share. After you specify the details for OpenText Core Share, do not change the OpenText Core Share tenant account credentials. Else, Documentum Connector for Core Share will not be able to properly synchronize content from the repository to OpenText Core Share.

5. Click **Sign In**. You will now be redirected to Documentum Connector for Core Share on successful sign in.

Chapter 3

Profiles

3.1 Using the Profiles tab

A profile is a set of policies that determine the type of content to publish from the OpenText™ Documentum™ Content Management repository to OpenText Core Share.

Using the **Profiles** tab, you can view, add, copy, edit, and delete profiles. The table in this tab lists the existing profiles and their descriptions.

To add, copy, or edit a OpenText Core Share profile:

1. Type a name for the profile.

2. Type a descriptive text for the profile.

3. In **Profile Type**, select how to synchronize documents:

    • **Publish only (one way)**: Only publish documents from the repository to OpenText Core Share folder.

    • **Publish and Revise (two-way)**: Synchronize documents between OpenText Documentum CM and OpenText Core Share.

4. Specify the options to publish the document to OpenText Core Share using the **Publishing Options** tab. For more information, see Publishing Options.

5. Specify the metadata details to be published with the document to OpenText Core Share using the **Metadata Publisher** tab. For more information, see Metadata Publisher.

6. If using a two-way profile, specify the revision options using the **Revision Options** tab. For more information, see Revision Options.

7. Click **Save**.

3.1.1 Publishing Options

The **Publishing Options** tab allows you to specify filters on the content that can be shared with recipients on OpenText Core Share folder. It contains the following fields:

• The **Object types** field specifies which object types (including subtypes) are published with this profile. When you click the plus button, a dialog box displays the object types and their subtypes. By default, `dm_document` objects and all formats are selected.

• The **Formats** table specifies the formats of the content that can be published with this profile. When you click the plus button, a dialog box displays the supported

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formats. In this dialog box, you can select a format by clicking the check box against it.

- The **Publish any rendition matching this list if primary rendition does not match** option allows you to publish any rendition of a matching document. For example, if you allow only PDF formats to be published and a document has a primary rendition of CRTEXT and a PDF rendition, the document's PDF rendition is published if you select this option and is not published if you do not select this option.

  If you select this option, the order of the formats in the **Formats** field is important in that the first supported format in the list is used. For example, a document has a primary rendition of CRTEXT, as well as Word and PDF renditions. The Word rendition is published if the Word format is above PDF in the **Formats** list. You can move a format by selecting it and using the Move up and Move down buttons. Use the Move top button to move a selected format to the top of the list. Use the Move bottom button to move a selected format to the bottom of the list.

- When you select the **Publish current version only** option (default setting), the Documentum Connector for Core Share publishes the current version of the document. The current version is the last checked in version but can have a lower version number if branching occurred. Clear the option to publish a version other than the current version, you must also specify additional publishing criteria in the **Other attributes** section.

- The **Other attributes** section allows you to configure these attributes. Using the fields **Property**, **Condition**, and **Value** you can create a criteria that must be true before publishing the files to OpenText Core Share. If you have multiple criteria then you can use the **AND/OR** field to create a complex criteria. The complex criteria is evaluated from top to bottom in the order of precedence of the operators. The AND operator has higher precedence than the OR operator.

  Note: If the **Property** type is ID based, you can only use the "=" condition. Ensure to specify the complete actual OpenText Documentum CM supported ID in the **Value** field to configure the profile filters.

  For example:

  ```
          Criteria 1
  AND     Criteria 2
  OR      Criteria 3
  AND     Criteria 4
  ```

  This complex criteria is true when either of the following criteria is true:

  ```
  Criteria 1 and Criteria 2
  Criteria 3 and Criteria 4
  ```

  Note: File size limit allows you to specify the maximum file size to be published. Ensure to select the correct unit, which can be Kilobytes (KB), Megabytes (MB), or Gigabytes (GB).

3.1.2 Metadata Publisher

The **Metadata Publisher** tab allows you to specify the metadata that you can share with the document. It contains the following fields:

- The Documentum CM Server repository **Object types** field lists the object types (including subtypes) that was selected in the **Publishing Options** tab.

- The **Metadata** field lists the metadata of the object type that must be published with the document. Click the plus button, to select the metadata that you want to share with the document. You can select the metadata and click on minus button to delete a metadata from this field.

3.1.3 Revision Options

The two-way synchronization feature allows changes to shared content on OpenText Core Share to be synchronized back to the repository. While creating a new profile, Select the **Publish and Revise (two-way)** option and the **Revision Options** tab would be enabled.

The **Revision Options** tab contains the values used to import a revised document from the OpenText Core Share folder to the repository. You can choose to import synchronized files as a version, a rendition, or a clone.

Version: If you select `Version`, determine if the imported documents are published to the repository as minor or major versions, or select **Current Version** to have the imported documents overwrite the source documents in the repository. Afterwards, you can expand **Version attributes** to apply specific properties and their values to the imported document. For example, you can apply an author's name to the imported documents. If any attribute has the $modifier set, then the attribute would have the name of the user who modified the imported document on OpenText Core Share.

Rendition: If you select **Rendition**, each changed document is imported as a new document rendition of the source document. Renditions have a page modifier that starts with `Sync` followed by a numeric value that is related to when it got processed by the software.

Clone: If you select **Clone**, the documents are imported as new documents. Optionally, you can select a **Relation name** to be associated with the clone, and whether the document is a child or parent of the source document in **Relation direction**. By default, the same object type as the original source document is used for the clone, which you can change by selecting an **Object type**. If you wish to copy the attributes of the source file that match the attribute type selected, check **Copy attributes from source file**. Afterwards, in the **Clone attributes** section, you can apply specific properties and their values to the imported document. For example, you can apply an author's name to the imported documents. If any attribute has the $modifier set, then the attribute would have the name of the user who modified the imported document on OpenText Core Share.

Additionally, **Post processing method** allows you to include a server method for post processing of the imported documents. The post processing method must be an existing OpenText Documentum CM method. When invoked, the Connector provides the ID of the object, repository name, and username of the OpenText Core Share folder owner as follows: `-id %s -docbase_name %s -user_name %s`

> **Note:** Only updates to documents published from OpenText Documentum CM to OpenText Core Share are synchronized back to OpenText Documentum CM. New files added to the shared folder on OpenText Core Share are not synchronized back to OpenText Documentum CM.

Chapter 4

Folders

4.1 Using the Folders tab

You can map content in a OpenText Documentum CM repository to a folder in OpenText Core Share, which can be accessed by the recipients with whom you share the folder. After mapping, files from the repository are published to the OpenText Core Share folder and kept synchronized.

Using the **Folders** tab, you can view, add, edit, copy, and delete OpenText Core Share folders. The table in this tab provides the following information:

- **Repository Folder**: Path to the repository folder that is published or synchronized to OpenText Core Share.

- **External Share**: The name that appears as the folder name in OpenText Core Share. This is the folder that is available to the recipients to view.

- **External Share Storage**: The target repository where the folder or files are published. The default value is `OpenText Core Share`.

- **Profile**: The set of policies that determine the type of content to publish or synchronize between the repository and OpenText Core Share. For more information, see the Profiles section .

- **Owner**: The repository username of the person who created the mapping from the repository to the OpenText Core Share folder.

📄 **Note:** The table is not automatically updated. Click **Refresh** to view the latest information.

You can perform the following actions to add, edit, or copy a OpenText Core Share folder:

- In the **Repository folder** field, select the repository folder to publish. Click the ellipsis button to view a list of repository folders. Publishing a folder publishes or synchronizes all documents and subfolders within the folder. This action cannot be performed when editing a previously created share.

- Optionally, change the name of the folder in the **External Share name** field. The name you enter here appears in the OpenText Core Share account of the recipient. This action cannot be performed while editing a previously created share.

- In the **External Share owner** field, select the owner of the mapping from the repository to the OpenText Core Share folder. The owner is a OpenText Documentum CM repository account. Click the ellipsis button to select a different user.

- **Sync frequency** allows you to set how often to update changes on the Documentum CM Server to OpenText Core Share. The **Sync frequency** is the time the workflow pauses before it starts the next publishing or synchronization cycle. The default is `1 minute`.

- In the **External Share** field, enter the target repository where the folder or files are published. The default value is `OpenText Core Share`.

- In the **Profile** field, select the name of a previously created profile. Click the **details** link to view the object types and formats that the profile publishes, and other properties. You can edit profiles only in the **Profiles** tab from the main window.

- In the **Share with** field, to give access to the content in the OpenText Core Share folder, click the **Add Users** or **Add Group** icon and add users or groups to the list. You can set the user permissions for the OpenText Core Share folder in the **Add Users** or **Add Group** dialog boxes. The available options are Viewer, Manager, Limited, and Collaborator. To change the permissions, click on the permissions listed for the user or group. When you create a OpenText Core Share folder, an invitation email is automatically sent to the addresses you add to this field.

- Optionally, enter a message in the **Personal note** field, which is included in the invitation email.

> **Notes**
>
> - Any changes performed to the shared folder in OpenText Core Share will cause the previously shared folders to synchronize incorrectly.
>
> - Groups and members of groups must be created on OpenText Core Share. The **Add Group** dialog lists the Group names that were created on OpenText Core Share. You can choose one or more groups to receive a share.

Chapter 5

Repair

5.1 Using the Repair tab

Use the **Repair** tab to assess if the content is successfully shared with the recipients and in the event of failures, the Adminstrator can remediate a failed synchronization. This tab lists the shares that are out of synchronization.

To repair a failed synchronization, perform the following:

1. Click **Download details** to download the `faileditems.csv` file.

    The `faileditems.csv` file lists the details of all the failed shares.

2. In the **Repair** tab, click **Repair** to fix the failed shares.

    The failed shares are recovered in the next synchronization cycle and the list in the **Repair** tab is cleared.

3. Open `faileditems.csv` in Microsoft Excel and perform the required manual actions (if any) before the next synchronization cycle to resolve the failed shares at the folder level.

    📄 **Note:** If the failed list of shares continues to be displayed in the **Repair** tab, contact OpenText™ Global Technical Services.