

OpenText™ Content Connect

User Guide

Manage documents and emails in the OpenText™ Documentum™ Content Management repository to work with Microsoft® Office desktop and web applications.

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Chapter 1

Introducing Content Connect

Content Connect is a connector that provides a technology bridge between web or desktop version of Microsoft Office applications and OpenText Documentum Content Management (CM) repository. The connector is uploaded to applications as a Microsoft Office add-in. It is a component of OpenText™ Documentum™ Content Management for Microsoft® 365™.

The Connector enables you to:

- Create folders in repositories and upload and download files between repositories and Microsoft Office applications.
- Open files or templates, edit or add content using Microsoft Word, Excel, and PowerPoint, and import files into repositories.
- Lock and unlock the repository files for editing in Microsoft Word, Excel, and PowerPoint, and submit updated versions.
- Import email from Microsoft Outlook along with attachments, with an option to import copies of attachments separately. Compose emails and add files from repositories as attachments. Establish a relation between an email and its attachments. You can perform these tasks from a user mailbox or a shared mailbox.



Notes

- The emails imported from Content Connect into OpenText Documentum CM through the connector are stored in the .EML format. The .EML format is the preferred storage format for long term storage and they are independent of the email clients, such as Microsoft Outlook.
- View the repository folder structure, search for files, view and edit file properties, and add files to Favorites.

1.1 Terms and definitions

The following terms are used in this guide when discussing Content Connect.

Table 1-1: Terms and definitions

Microsoft Office web applications	Microsoft Office 365 web version applications (Microsoft Word, Microsoft Excel, and Microsoft PowerPoint) and Microsoft Outlook.
Microsoft Office desktop applications	Microsoft Office 365 and Microsoft Office desktop applications (Microsoft Word, Microsoft Excel, and Microsoft PowerPoint) and Microsoft Outlook.

Chapter 2

Enabling the Microsoft Office add-in

To use Content Connect with the Microsoft Office applications, you need the appropriate Microsoft Office add-in. The add-in for your Microsoft Office applications is typically deployed by administrators.

For the first time, when you are importing or saving a file into the Content Connect repository, you may be prompted to download and install the latest `DCMAppInstaller.msi` file (Documentum Client Manager) for the following applications:

- Content Connect with OpenText™ Documentum™ Content Management client (Outlook, Word, Excel, and PowerPoint)

Depending on the OpenText Documentum Content Management (CM) client setup in your organization, one of the following interfaces will be enabled:

- Classic View

The traditional, widget-based OpenText Documentum CM client interface.

- Smart View

OpenText tile-based Smart View user interface.

This guide is applicable to both Classic View and Smart View interfaces unless addressed specifically as applicable for Smart View interface.

Install the `DCMAppInstaller.msi` file and refresh the screen to use Content Connect.

The Documentum Client Manager installation is not required if the correct version is installed as part of the OpenText Documentum CM client installation.



Notes

- When you log in to OpenText Documentum CM, you are prompted to connect to the Documentum Client Manager application. Click **Open DCMApp.exe**. You can select the **Always allow...** check box to always allow `DCMApp.exe` connection.

2.1 Enabling the Microsoft Office add-in for Microsoft Word, Excel, or PowerPoint

1. In Microsoft Word, Excel, or PowerPoint, select a blank template.
2. Select **Home > Add-ins > More Add-ins**.
3. Select **ADMIN MANAGED** or **SHARED FOLDER > Documentum**. The **Documentum** tab and its menu icons appear in the application.

2.2 Configuring the preferred language

Content Connect supports the following languages:

- English: EN-US
- German: DE-DE
- Spanish: ES-ES
- French: FR-FR
- Chinese (Simplified): ZH-CN
- Italian: IT-IT
- Hebrew: HE-HE
- Hebrew (Israel): HE-IL

You can configure Content Connect with any of the preceding list of languages on the Microsoft client:

- If you are using Microsoft Office web client (Microsoft Office 365), then configure the preferred language in the web version of Microsoft Office. For more information, refer to the *Microsoft documentation*.
- If you are using Microsoft Office desktop client, then configure the preferred language in **File > Options** in Microsoft Office. Ensure that you are using the version of Windows in the preferred language.

Chapter 3

Logging in and selecting a repository

To access and work with documents or email files in a repository, you need to log in from Microsoft Office application and select a repository. You can then switch between applications without logging in again, unless you want to log in as a different user.



Notes

- When you login to the OpenText Documentum CM application for the first time, you are prompted to share your system's geographical location to the OpenText™ Documentum™ Content Management Server for auditing purposes.


The following procedures apply to both web and desktop versions of Microsoft Office applications.

3.1 Logging in to Microsoft Office applications

To access the login dialog box from Microsoft Word, Excel, or PowerPoint:

1. On the Microsoft Word, Excel, or PowerPoint menu, select **Documentum**.
2. Click **Open** to display the login dialog box in the task pane.

To access the login dialog box from Microsoft Outlook:

- From a Microsoft Outlook folder, open an email and click the **Documentum**  icon in the email header to display the login dialog box in the task pane.

If you are not able to see the OpenText Documentum CM application or your administrator set the OpenText Documentum CM application as optional, perform the following steps:

- Go to **All Apps / Get Add-ins** option in the ribbon.
- Select the **Documentum** application.
- The OpenText Documentum CM screen is opened in the top right corner, click **Pin**.

The application is pinned to the task panel.



Notes

- If you have already logged in from another Microsoft Office application or have single sign on, you are automatically logged-in with your user name and the selected repository in OpenText Documentum CM.

3.2 Performing authentication and selecting a repository

In the login dialog box, enter the required information to authenticate. Based on how your administrator has configured the system options may be presented such as selecting a repository or application to use.

After you are authenticated, your user name and the repository name appear in the task pane, above the list of the repository folders. You can click the user name at any time to log out and log in as a different user.

Chapter 4

Managing documents with the connector

You can use web or desktop version of Microsoft Office applications as follows:

- Add folders to repositories
- Create documents and import these into repositories
- Unlock, lock, and edit documents
- Check in and check out documents from the repositories
- Work with previous versions of a document
- Edit document properties
- Search for documents or folders
- Add documents or folders to a list of Favorites



Note: You can work on the current document while simultaneously performing various operations on documents listed in the task pane in OpenText Documentum CM.

The **Documentum** user interface and the procedures in this chapter are the same for web and desktop version of Microsoft Office applications (Word, Excel, and PowerPoint).

4.1 Basic navigation

This section describes some basic tasks you can perform in OpenText Documentum CM.

4.1.1 Breadcrumb trail

When viewing folders and documents in the repository, a simple breadcrumb trail lists the basic file structure of your current location in the repository. Click the ellipses (...) to see the entire file structure of your location. You can click on any of the folders in the breadcrumb trail to navigate to that location.

4.1.2 Creating a link to a document in OpenText Documentum CM

When viewing a list of documents in the repository, you can copy a link to the file to your clipboard. You or other users with permission can use this link to directly open the file in the repository.

To create a link, click the ellipses (...) next to a file or version of a file and click **Copy Link**. You can paste the link in any text editor or field.



Note: This action may not be available in all systems.

4.1.3 Viewing a document location in OpenText Documentum CM

Microsoft Office (Word, Excel, and PowerPoint) users can navigate to the document location in OpenText Documentum CM client. Viewing the document from this location helps perform any OpenText Documentum CM client task actions before you attach the document to the email. To view the document from this location, click the ellipses (...) next to the item and then select **View in Documentum**.



Note: This action may not be available in all systems.

4.1.4 Previewing a document

When viewing a list of documents in a repository, you can preview an item. Click the ellipses (...) next to the item and then select **Preview**.

4.2 Creating folders

You can create folders for documents that you want to import into the repository.

To add a folder to the repository:

1. Select **Documentum > Open** to access repository folders and documents in the task pane.
2. In the task pane, select the repository name to display the root folder and folder structure of the repository.



Note: Repository folders lists the Microsoft Office (Word, Excel, and PowerPoint) files that are in .docx, .xlsx, and .pptx formats respectively.

3. Click the plus icon above the list of folders to display the **New Folder** property fields.
4. In the property fields, enter information for the folder. The **Name** field is mandatory. You can select any type. The type defines the folder.

5. Specify a name for the folder, enter any other information, and select **Save**. The new folder is displayed in the task pane.

To add a folder to the repository using OpenText Documentum CM client:



Note: Make sure to add the third-party cookies in the browser settings. For more information, see [“Third-party cookies” on page 35](#).

1. Select **Documentum > Open** to access repository folders and documents in the task pane.
2. In the task pane, select the repository name to display the root folder and folder structure of the repository.



Note: OpenText Documentum CM repository will display only files that can be opened by the application you are working in.

3. Click the plus icon above the list of folders. The OpenText Documentum CM client Import Folder window opens.
4. You can provide the properties for the folder and complete the wizard to create a new folder.

4.3 Importing files (Word documents, Excel spreadsheets, and PowerPoint presentations)

You can create new files from existing files or templates, by editing or adding content in Microsoft Office applications (Word, Excel, and PowerPoint), and importing these files into a repository.



Note: The connector supports import of files with .docx, .xlsx, and .pptx extensions.

To import a file into the repository:

1. On the **Documentum** menu, perform one of the following tasks:
 - Open a file from Office 365 or Desktop version.
 - Select **Open** to access repository folders and files in the task pane, and double-click a file to open it.
 - Select **Templates** to display a list of templates located on the OpenText Documentum Content Management (CM) Server in the task pane, and double-click a template to open it.
2. In the editing pane, add new content or edit existing content.
3. Select **Save As**. In the task pane, section headings for file target locations and file details are displayed.

4. Importing a document into the repository depends on the Administrator configuration.

- The **Select Location** is displayed depending on the Administrator configuration.
- Select **Select Location** to display the repository folder structure.
- Select one of the following options to select a location for your file:
 - Choose an existing folder.



Note: Use the search feature to quickly locate the target folder while importing files. See [Searching for files and folders](#).

- Click the plus icon above the list of folders to display the **New Folder** property fields, and create a folder for the file. For more information, see the final steps in [Creating folders](#).



Note: Microsoft Word online does not support importing and viewing Word documents containing 3D images (watermarks) or stock images. For more information, see [Differences between using a document in the browser and in Word](#) article in *Microsoft documentation*.

5. Select **Next** to display the **Enter File Details** section, which lists the most relevant properties of the file. To view all properties, select **Show All** at the bottom of the list.
6. In the property fields, enter the required information for the file. The **Name** field is mandatory.



Notes

- You can select from a list of available types configured for the repository by the administrator.
 - Based on the Administrator configuration, the values in the editable text fields can contain only allowable special characters.
7. Select **Save**. A notification confirms that the file has been imported, and additional properties are displayed. If necessary, you can edit properties and select **Save Edit**.



Notes

- Repository folders list the Microsoft Office documents that are in .docx, .xlsx, and .pptx format respectively.
- In Microsoft Office applications, when you open a new or existing file or a template while working on a file, a notification informs you that this operation will overwrite your content if you choose to continue. If you want to save your content, make sure you save the file before opening another file or template.

- When you open a file from a repository, it opens on the last page. Also, the file's name may not match the title in the preview screen.

To import a file into the repository using OpenText Documentum CM client:

1. On the **Documentum** menu, perform one of the following tasks:
 - Open a file from the cloud or other source.
 - Select **Open** to access repository folders and files in the task pane, and double-click a file to open it.
 - Optionally, select **Templates** to display a list of templates located on the Documentum CM Server in the task pane, and double-click a template to open it.
2. In the editing pane, add new content or edit existing content.
3. Select **Save As**. In the task pane, section headings for file target locations.
4. Select **Select Location** to display the repository folder structure.

Based on the Administrator configuration, the location selection for file is displayed.

- Choose an existing folder.



Note: Use the search feature to quickly locate the target folder when importing files. See [Searching for files and folders](#).

- Click the plus icon to create a new folder. For more information, see the final steps in [Creating folders](#).

5. Select **Save**.
6. In the **Import File** dialog box, specify the relevant details and complete the wizard. A notification confirms that the file is imported.

When you import the item, it may be imported to a different location that is configured by Administrator and you are navigated to the imported file location.

7. To view the properties of the file, select the file and select **Details**.



Notes

- In Microsoft Office applications, when you open a new or an existing file or a template while working on a file, a notification indicates that this operation will overwrite your content if you choose to continue. If you want to save your content, make sure you save the file before opening another file or template.
- When you open a file from a repository, it opens in the last page. The file name might not match the title in the preview screen.

4.4 Locking and unlocking files for editing

In OpenText Documentum CM, you can update a file that you have added to a repository, or any version of a file, then lock the file and submit it to the repository as a new version. You can also update any version of a file in the repository. You can unlock and open files for editing at any time, but you cannot unlock files that have been locked by other users.

To lock, edit, and unlock a repository file:

1. Select **Documentum > Open** to access repository folders and files in the task pane.
2. In the task pane, locate and select the file you want to edit. Files you have locked display a key icon. Files locked by other users display a lock icon and can be unlocked only by the owners.
3. Select the file to display its content in the editing pane.



Note: If you close the document without submitting your changes, you can use Office 365 to resume your work, perform edits, and then **Submit** using **Documentum**.

4. Open the file, and select **Lock**. A notification confirms that the file has been locked.
5. Edit the file and select **Submit**. In the task pane, the section headings **Save** and **Enter File Details** appear.
6. On the **Save** menu, click the down-arrow to display the available version options for the file, select a version and select **Next**.
7. In the file details section, click the down-arrow to display the property fields, update the information if necessary and select **Save**.
8. To access the file you have just updated, select **Open**. The updated file in the task pane displays the key icon and for other users, the lock icon.
9. If you have locked the file and do not want to save your changes, select **Release Lock**. The key icon disappears from the file.



Note: If you release the lock, any changes you have made to the file is not saved to the repository. You should use the **Submit** option, if you want to save any changes.

To lock, edit, and unlock a repository file when using OpenText Documentum CM client:

1. Select **Documentum > Open** to access repository folders and files in the task pane.

2. In the task pane, locate and select the file you want to edit. Files you have locked display a key icon. Files locked by other users display a lock icon and can be unlocked only by the owners.
3. Select the file to display its content in the editing pane.
4. Open the file, and select **Lock**. A notification confirms that the file has been locked.
5. Edit the file and select **Submit**. The OpenText Documentum CM client **Import File** dialog box is displayed.
6. Select **Save** to check in the updated file.
7. If you have locked the file and do not want to save your changes, select **Release Lock**. The key icon disappears from the file.



Note: If you release the lock, any changes you have made to the file is not saved to the repository. You should use the **Submit** option, if you want to save any changes.

4.5 Viewing and editing file details

You can view and edit a variety of properties of a file. You can also view the history of the file.

To view and edit properties of a file:

1. Select **Documentum > Open** to access repository folders and files in the task pane.
2. In the task pane, locate and select a file that you own. If you have locked the file, select **Release Lock**.
3. On the menu, select **Details**. The task pane displays the name of the file, followed by a list of the most relevant properties of the file. To view all properties, select **Show All** at the bottom of the list.



Note: When using OpenText Documentum CM client, the OpenText Documentum CM client Properties dialog box opens.

4. Edit properties and select **Save Edit**.



Note: When using OpenText Documentum CM client, select **OK**.

To view the versions of a file:

- When file details are displayed in the task pane, select **Versions** below the file name. The following information is displayed: who last updated the file, version of the file, and date and time of the last update. The last updated version information is displayed at the top of the version page.

4.6 Using templates

You can view templates located on the Documentum CM Server and select them to create files you want to import into a repository.

To choose and open a template:

1. Select **Documentum > Templates**. A list of templates is displayed in the task pane.
2. Select and double-click a template to create your file.



Note: In Microsoft Office web version, when you open a template while working on a file, a notification informs you that this operation will overwrite your content if you choose to continue. If you want to save your content, save the file before opening a template.

4.7 Searching for files and folders

The connector search feature allows you to search OpenText Documentum CM from within the Microsoft application and enables you to perform basic keyword searches for files, emails, and folders, or perform more advanced searches using several parameters. If you obtain a large number of results in a search, you can apply a filter to display only the most relevant items. Use the search feature to quickly locate the target folder when importing files.



Note: Search path is displayed based on the Administrator configuration.

To perform an advanced search:

1. In the **Search** field, click the down-arrow to view advanced search options.
2. Type a keyword in the mandatory **Contains** field, select one or more additional search parameters and select **Search**. Files or folders returned by the search appear in the task pane.

To apply a filter to your search:

1. Perform a search to obtain a list of items.
2. Select the filter icon below the search field.
3. Select one or more filter options, or enter keywords, to obtain only the most relevant items from the list of search results.
4. Select **Apply Filter**. A small list of one or more items appears in the task pane, filtered from the original list of search results.

4.8 Adding files and folders to Favorites

You can add any file or folder in a repository to the Favorites list for quick access.

To add items to Favorites:

1. On a file or folder in the task pane, select the empty star icon. The star icon turns solid yellow to indicate that the item has been added to Favorites.
2. To access the item, select **Favorites**. A list of all your favorite files and folders is displayed. You can remove an item from Favorites by selecting the yellow star icon.

4.9 Viewing and editing previous versions of Microsoft Office files

You can view and edit previous versions of files in the repository.



Note: When you edit a previous version of a file and submit it to the repository, that version becomes the current version.

To view a previous version of a file:

1. Navigate to a file in the repository.
2. Next to the file, click the ellipses (...) and click **Versions**.
3. Open the version of the file you want to view.

To edit a previous version of a file:

1. Navigate to a file in the repository.
2. Next to the file, click the ellipses (...) and click **Versions**.
3. Open the version of the file you want to view.
4. Click **Lock**.
A key icon appears next to the file.
5. Make changes to the file and once complete, click **Submit**.

Chapter 5

Managing email with the connector

You can use the web or desktop version of Microsoft Outlook application to import emails and their attachments into repositories.

The Connector enables you to create folders for emails, search for emails or folders, and add emails or folders to a list of Favorites. When using Microsoft Outlook desktop application, the add in is enabled after you select an email. When importing emails, you can select attachments and save copies as separate files. In addition, you can also attach files from repositories when composing emails. The Connector supports user mailbox and shared mailbox.


The OpenText Documentum CM task pane's user interface, and the following procedures, are the same for the web and desktop version of the application. You can click the pin button in the top-right corner of the OpenText Documentum CM pane to pin the pane.



Note: There is a delay in archiving emails when using a shared mailbox.

5.1 Importing emails

To import an email into the repository:

1. From a Microsoft Outlook folder, open an email and click the **Documentum**  icon. The **Documentum** task pane is displayed.
2. In the task pane, select **Select Files**. One of the following appears:
 - Based on the Administrator configuration the emails and attached files are displayed. By default, the attachments are not selected. You can select or clear the required check boxes of any attached file. When the email, with all its attachments, is imported, copies of any files you have selected will be imported as separate files.
 - Based on the Administrator configuration the icon of the email file is displayed. Copies of attached files cannot be imported separately when importing the email and its attachments.

Click **Reset** to clear all the selections made and the entered metadata. You must start from **Step 1** to proceed with the import again.



Notes

- Email attachments from OneDrive or any other cloud source are not supported for attachment separation during individual email import.

- Email attachment files, such as .bat files, are not supported by Outlook and therefore, the attachments do not get separated when importing the email.
 - Email files, and any of their separated files, that have already been imported are displayed as cloud icons. The cloud icon is seen in the **Select Files** section after the successful import.
 - You cannot import the following email messages into the repository:
 - Email messages that are in the **Drafts** folder.
 - Delivery confirmation email messages.
3. Importing an email into the repository depends on the Administrator configuration.

Based on the Administrator configuration, you can:

- The imported files are saved to the predefined folder path.
- Select **Select Location** to display the repository folder structure.
- Select one of the following options to select a location for your email to be imported:
 - Choose an existing folder.



Note: Use the search feature to quickly locate the target folder while importing emails. See [Searching for files and folders](#).

- Click the plus icon above the list of folders to display the **New Folder** property fields, and create a folder for the email to be imported. For more information, see the final steps in [Creating folders](#).
4. In the **Enter File Details** section, enter the metadata or the property information for the file attachment. The **Name** field is mandatory.



Note: The text fields can be restricted only to contain special characters by your administrator.

After entering the metadata for the first attachment of type email or document, based on the number of object types configured by the Administrator, you can choose to apply the specified metadata to all the corresponding attachment types at once.

- Single object type:
 - **Apply to all attachments:** Click to apply the metadata specified for the parent email to all the selected email and document attachments at once.
- Two or more object types:
 - **Apply for all emails:** Click to apply the metadata specified for the parent email attachment to all the selected email attachments at once.

- **Apply for all attachments:** Click to apply the metadata specified in the first attachment (document and image) to all the selected document attachments at once.



Note: For emails with multiple attachments of different file types, after you apply the metadata for all the attachments, you can edit the property information individually, if needed.

5. Select **Save**. A notification confirms that the file has been imported.



Notes


- When the attachment separation feature is enabled, the import may be only partially successful if unsupported file formats are included in the email attachments.

To import multiple emails into the repository:

To import multiple emails into a repository simultaneously, move all the required emails into the designated folder for multiple email import. By default, the multiple email import folder **Documentum** is created in Microsoft Outlook. The multiple email import folder can be customized by the Administrator. If you are unable to view this folder in inbox, refresh Microsoft Outlook.



Notes

- Email attachments from OneDrive or any other cloud source are not supported for attachment separation during multiple emails import.
 - Email attachment files, such as .bat files, are not supported by Outlook and therefore, the attachments do not get separated when importing the email.
1. From a Microsoft Outlook folder, open an email and click the **Documentum**  icon. The **Documentum** task pane is displayed.



Note: While performing multiple emails import, ensure to invoke the OpenText Documentum CM application from any email folder other than the folder containing the emails to be imported.

2. In the top left corner of the OpenText Documentum CM task pane, click the email icon (representing the number of emails in the folder) and click **Import**.
3. In the **Select Folder** section, select the folders or its subfolders that you want to import into the repository.



Notes

- Only the first level of subfolders are listed for the import operation.
- The number of emails is displayed next to the folder name for each folder. This number is more, if you have enabled the option to view emails as a conversation.

- The administrator can set a limit on the number of emails that you can import each time. If you exceed this limit, a warning is displayed during the Import operation.
4. While selecting folders, you can choose to import only emails or only the attachments using the following check boxes. By default, the **Select all emails** option is selected.
 - Select all emails: Imports all the emails excluding the attachments.
 - Select all attachments: Imports all the attachments excluding the associated emails. In this scenario, any one of the attachments from the same email is considered as the parent and the remaining as child.
 5. Click **Next** to display the repository folder structure in the **Select Location** section.
 6. Select a target folder for the emails to be imported and click **Next**.
 7. In the **Enter File Details** section, enter the metadata or the property information for the email. The field **Name** is auto-populated and is mandatory.

After entering the metadata for the first file of type email or document, based on the number of object types configured by the Administrator, you can choose to apply the specified metadata to all the corresponding file types:

- Single object type:
 - **Apply to all attachments:** Click to apply the metadata specified in the first email to all the email attachments.
- Two or more object types:
 - **Apply to all emails:** Click to apply the metadata specified in the first email to all the emails.
 - **Apply to all attachments:** Click to apply the metadata specified in the first attachment (document and image) to all the attachments.



Notes

- For emails with multiple attachments of different file types, after you apply the metadata for all the attachments, you can edit the property information individually, if needed.
 - Click the ellipses (...) next to the email and then select **Details** if you want to view and edit the document properties.
8. Click the arrows next to the Subject of the email to move to the next email or the previous email.
 9. After you update the properties of all the emails, click **Save**.
 10. Wait for the notification to confirm that the files are imported.

**Caution**


If you close the application before the notification, the import might not complete.

To import an email into the repository using OpenText Documentum CM client:

The imported emails are either moved to Archive or Deleted Items folder in the Outlook as configured by the Administrator. Email Attachments are separated out as configured by the Administrator. In addition, if the attachment separation feature is enabled, you can select attachments to import copies of these as separate files.

**Notes**

- If any of the unsupported characters (such as <, >, :, ", /, |, ?, *, [,]) exist in the file name or in the email subject, they are replaced with “_”.
- Make sure to add the third-party cookies in the browser settings. For more information, see [“Third-party cookies” on page 35](#).

1. From a Microsoft Outlook folder, open an email and click the **Documentum**  icon. The **Documentum** task pane is displayed.



Note: Email attachments from OneDrive or any other cloud source are not supported for attachment separation during individual email import.

2. In the **Documentum** task pane, select **Select Files**.
3. Select the **Microsoft Outlook Express Electronic Mail** file format in the OpenText Documentum CM client import dialog. Attachments are separated in the OpenText Documentum CM client import dialog.
4. Select **Next** and select **Select Location** to display the repository folder structure.
 - If folders are available, select a folder to import the email into the required location within the folder.
 - If folders are not available, select from the following options to select a location for your email:
 - Choose an existing folder.



Note: Use the search feature to quickly locate the target folder when importing files. See [Searching for files and folders](#).

- Click the plus icon to create a new folder. For more information, see the final steps in [Creating folders](#).
5. In the OpenText Documentum CM client **Import File** dialog box:
 - Select the profile.
 - Set the file format to **MS Outlook Express Electronic email** to enable attachment separation.

6. Specify the relevant details and complete the wizard. A notification confirms that the email is imported.


**Notes**

- You cannot import the following email messages into the repository:
 - Email messages that are in the **Drafts** folder.
 - Delivery confirmation email messages.

To import multiple emails into the repository using OpenText Documentum CM client:

To import multiple emails into a repository simultaneously, move all the required emails into the designated folder for multiple email import. By default, the multiple email import folder **Documentum** is created in Microsoft Outlook. The multiple email import folder can be customized by the Administrator. If you are unable to view this folder in inbox, refresh Microsoft Outlook. You can enable attachment separation in OpenText Documentum CM client using client configuration.

**Notes**

- While performing multiple emails import, ensure to invoke the OpenText Documentum CM application from any email folder other than the folder containing the emails to be imported.
 - Email attachments from OneDrive or any other cloud source are not supported for attachment separation during multiple emails import.
 - The administrator can provide a threshold for multiple files import. Based on the threshold and the number of files being imported, you are prompted to enter the file properties individually for each file or inherit the file properties from the OpenText Documentum CM client folder structure configuration in client configuration to all files being imported. Contact your administrator to know the threshold information.
1. From a Microsoft Outlook folder, open an email and click the **Documentum**  icon. The **Documentum** task pane is displayed.
 2. In the **Documentum** task pane, click the email icon and click **Import**.
 3. In the **Select Folder** section, select the multiple email import folder or its subfolder that you want to import into the repository.

**Notes**

- Only the first level of subfolder is listed for the Import operation.
- The number of emails is displayed next to the folder name for each folder. This number is more, if you have enabled the option to view emails as a conversation.

- The administrator can set a limit on the number of emails that you can import each time.
4. Select **Next** to display the repository folder structure in the **Select Location** section.
 5. Select a target folder for the file and click **Save**.
 6. In the **Import File / Folder Structure Import** dialog box in OpenText Documentum CM client, specify the relevant details and complete the wizard.
 7. Wait for the notification to confirm that the files are imported.



Caution

If you close the application before the notification, the import continues in the background. If you imported a large amount of emails, it might not complete. When you reopen the application, OpenText Documentum CM runs a cleanup process, however, if you perform any action during this process, it will not complete and you will not receive the import status notification.



Note: When specifying the details, if you select OpenText Documentum CM client mail rendition as the file format, then a red email icon is displayed for this email.


5.2 Attaching files to an email

When composing emails in Microsoft Outlook, you can select files from a repository to include as email attachments. You can also select any version of the document to send as an attachment.



Note: Email attachment with subject more than 255 characters are not supported from the repository in the Compose mode.

To attach files from a repository to an email:

1. Compose an email and click the **Documentum**  icon located at the bottom.
The OpenText Documentum CM task pane opens and displays the repository folder structure.
2. Attach files:
 - To attach the current version of a file, click the file.
 - To send a previous version of a file, click the ellipses (...) next to the file and click **Versions**. Then, click the version of the file you want to attach.

A notification confirms that the file has been attached to the email.



Important

Email with attachments are moved to the **Drafts** folder during the Compose mode if Outlook does not meet the following criteria:

Outlook 2019 with Microsoft 365 subscription or retail one-time purchase with Office version 1910 (Build 12130.20272) and later.

5.3 Performing other tasks in Microsoft Outlook

In addition to importing emails and attachments into a repository, and attaching files from a repository to emails, the connector enables you to perform the following tasks:

- Create folders - see [Creating folders](#).
- Search for emails and folders - see [Searching for files and folders](#).
- Add emails and folders to Favorites - see [Adding documents and folders to Favorites](#).

5.4 Viewing an email location in OpenText Documentum CM

Outlook users can navigate to the document attachment location in OpenText Documentum CM. Viewing the document from this location helps you with document-related details, workflow details, and perform any OpenText Documentum CM task actions before you attach the document to the email. To view the document from this location, click the ellipses (...) next to the item and then select **View in Documentum**.



Notes

- In Outlook, the **View in Documentum** feature is available only in the Compose mode.
- This action may not be available in all systems.

5.5 Previewing an email

When viewing a list of emails in a repository, you can preview an item. Click the ellipses (...) next to the item and then select **Preview**.

5.6 Creating a link to a document in OpenText Documentum CM

When viewing a list of emails in the repository, you can copy a link to the file to your clipboard. You or other users with permission can use this link to directly open the file in the repository.

To create a link, click the ellipses (...) next to a file or version of a file and click **Copy Link**. You can paste the link in any text editor or field. For example, in an email or an Office (Word, Excel, and PowerPoint) file.



Notes

- In Outlook, the **Copy Link** feature is available only in the Compose mode.
- This action may not be available in all systems.

Chapter 6

Content Connect interoperability with OpenText Documentum CM clients

If you are accessing documents from applications such as, OpenText Documentum xCelerated Composition Platform (xCP) and OpenText Documentum CM client, you can perform the following actions using Content Connect:

- Import using Documentum xCP custom types:
 - Import documents from Microsoft Word.
 - Import emails (.msg and .eml) from Microsoft Outlook along with attachments, with an option to import copies of attachments separately.

Content Connect supports business events for Documentum xCP custom types. For more information on how to configure xCP business events for Content Connect with Documentum xCP and import using Documentum xCP custom types, refer to *OpenText Documentum xCelerated Composition Platform User Guide*.

- Download the file in Documentum xCP and open from Content Connect.
- Check in the file changes into the respective applications.
- Update the file properties.
- Lock, unlock, and edit files.

These actions are seamless and are updated simultaneously in both the OpenText Documentum CM client application and Content Connect.



Notes

- The interoperability with Documentum xCP and OpenText Documentum CM client is supported only if you open or edit the file from these clients using Documentum Client Manager.
- Interoperability with PowerPoint is not supported.

6.1 Managing files from Documentum xCP

You can edit Microsoft files from the xCP client and then use the connector to check-in the changes directly from the Microsoft application.



Note: Supports only Microsoft Word and Excel.

To edit a file from xCP and check-in directly from the Microsoft application:

1. In the xCP repository, navigate to the file you want to edit.
2. Click the file to view it in the xCP viewer.
3. Click **Edit** to launch the file in the default desktop client application.
4. Edit the file.
5. In the Microsoft application, click **Documentum** add-in > **Submit**.



Note: You are prompted to enter your OpenText Documentum CM credentials if not logged in prior to submitting the changes.

6. In the **Submit** task pane:
 - Expand **Save** to choose the file to edit as a **Major Version** or a **Minor Version**. Click **Next**.
 - Expand **Enter File Details** to edit the file properties or the metadata attributes.
7. Click **Save**.

6.2 Managing files from OpenText Documentum CM client

You can edit Microsoft files from the OpenText Documentum CM client and then use the connector to check-in the changes directly from the Microsoft application.



Notes

- Supports only Microsoft Word and Excel.
- In OpenText Documentum CM client > **User settings**, ensure to choose **Documentum Client Manager** as the **Updated Browser Plugin** option.

To edit a file from OpenText Documentum CM and check-in directly from the Microsoft application:

1. From the OpenText Documentum CM repository, navigate to the file you want to edit.

2. Right-click and select **Edit** to launch the file in the default desktop OpenText Documentum CM client application.
3. Edit the file.



Note: Click **Details** in the OpenText Documentum CM menu of Microsoft Word if you want to edit the file properties.

4. In the Microsoft application, click the **Documentum** add-in in the OpenText Documentum CM menu of Microsoft Word> **Submit**.

You may receive a prompt to enter your OpenText Documentum CM credentials and/or version information prior to completing the check-in operation.

5. Click **OK**.
Refresh OpenText Documentum CM to verify the checked-in version.

Chapter 7

Troubleshooting

This chapter describes some common errors and appropriate resolutions.

7.1 Third-party cookies

Microsoft Office applications such as Word, Excel, PowerPoint, and Outlook may require the use of third-party cookies for the connector to operate. Ensure the following settings have been set by you or your administrator in the Microsoft Edge browser to allow Microsoft applications to use third-party cookies.

To include third-party cookies in Edge:

1. Go to Edge **Settings** window, select **Cookies and site permissions > Cookies and data stored > Manage and delete cookies and site data**.
2. Select the **Allow sites to save and read cookie data (recommended)** option, and disable the **Block third-party cookies** option.
3. In **Allow** option, select **Add** to add the following sites:
 - [*.]sharepoint.com
 - [*.]officeapps.live.com
 - [*.]application Fully qualified Domain Name.
For example: https://<localhost>.otxlab.net:8494
 - [*.]outlook.office365.com
 - [*.]outlook.office.com

