OpenText™ Documentum™ Content Management for SAP® Solutions

User Guide

This guide describes how to use OpenText Documentum CM for SAP Solutions.

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Table of Contents

Chapter 1

What is OpenText Documentum CM for SAP Solutions?

OpenText Documentum CM for SAP Solutions provides a 360º degree view on documents and data. You can retrieve and manage all OpenText Documentum CM content and SAP information on one and the same interface.

OpenText Documentum CM for SAP Solutions allows to synchronize metadata between SAP and OpenText Documentum CM, enrich ArchiveLink documents with additional metadata (for example the Business Object ID or Business Object type) to make it accessible within OpenText Documentum CM. It also provides functionality to create folder structures analogical to the structure in SAP.

Chapter 2

Working with OpenText Content Management

2.1 Home Page

You already know the concept of the **Home** page from your Documentum Smart View Client.

The goal of the **Home** page is to provide easy access to the functionality that is specific to your needs. The **Home** page is made up of several smaller sections, called tiles. The tiles that appear depend on how the system is configured, and may differ from other default pages.

In OpenText Content Management, you mainly use Business workspaces tiles to get an overview of your content and SAP data.

The following tiles can be configured for your OpenText Documentum CM Home page:

Welcome tile
A tile with a welcome text and possible a link to a video

Business workspaces tile
A tile that lists business workspaces and provides access to the data that is collected in the business workspace.

What can you do in the expanded view of a Workspace tile?

Open the business workspace
Click the workspace name.

Search by name
Type some letters that are contained in an attribute. The list is immediately reduced to only show entries that contain these letters. Your system configuration determines which attributes you can search.

Clear all text in this field
Display all items.

Click to sort descending
Sort by a column to quickly find a business workspace.

Favorite
Mark the business workspace as a favorite or remove the mark. Favorites workspaces are listed on the Favorites tile.

Close expanded view
Close the expanded view and return to the business workspace.

2.2 Keyboard navigation and accessibility

OpenText Documentum CM supports keyboard navigation to provide users with an alternative way to perform functions that are normally performed using a mouse.

Note: For some functions, keyboard navigation may change to Mouse Keys, which allow you to use the numeric keypad on your keyboard to move the pointer.

Table 2-1: General keyboard shortcuts

Shortcut	Action
TAB	Moves to the next interactive item
SHIFT + TAB	Moves to previous interactive item
Left arrow	Moves to the previous item in a menu or list, or leaves the menu.
Right arrow	Moves to the submenu
Down arrow	Moves to the next line in a list or menu, or to the next entry if there is no submenu
Up arrow	Moves to the previous line on a list or menu. For tables, moves to the previous item in the same column.
ENTER	Applies the edit mode to fields. For buttons or menus, executes the associated actions.
SPACE	Activate fields such as check boxes or radio buttons
ESCAPE	Close a list and leave edit mode

Table 2-2: Dialog box or overlay keyboard shortcuts

Shortcut	Action
TAB	Moves to the next interactive item
SHIFT + TAB	Moves to the previous interactive item
Left arrow	Moves to the previous item
Right arrow	Moves to the next item
Down arrow	Moves to the same position on the next line
Up arrow	Move to the same position on the previous line

2.3 Business workspaces

A business workspace is a document management area in OpenText Content Management. The documents that are added here from OpenText Documentum CM share all information related to a business object like documents, images and other objects or metadata. It also provides business data and relationships to other business objects.

Special case: Composite business workspaces

In SAP, there are complex entities which contain dependent entities which cannot stand alone. This mandatory relation can be mirrored by composite business workspaces, where all sub entities have a separate business workspace inside its parent business workspace. This feature is recommended for cases where dependent business objects are involved

When you create a business workspace for a maintenance task list, business workspaces for all operations are created automatically inside the task list's business workspace.

Business workspaces are individually configured. Tiles define the different areas that appear on the page and define the content and features that are available in the context of a business workspace. The tiles that appear for each type of business workspace are individually configured when the system is set up.

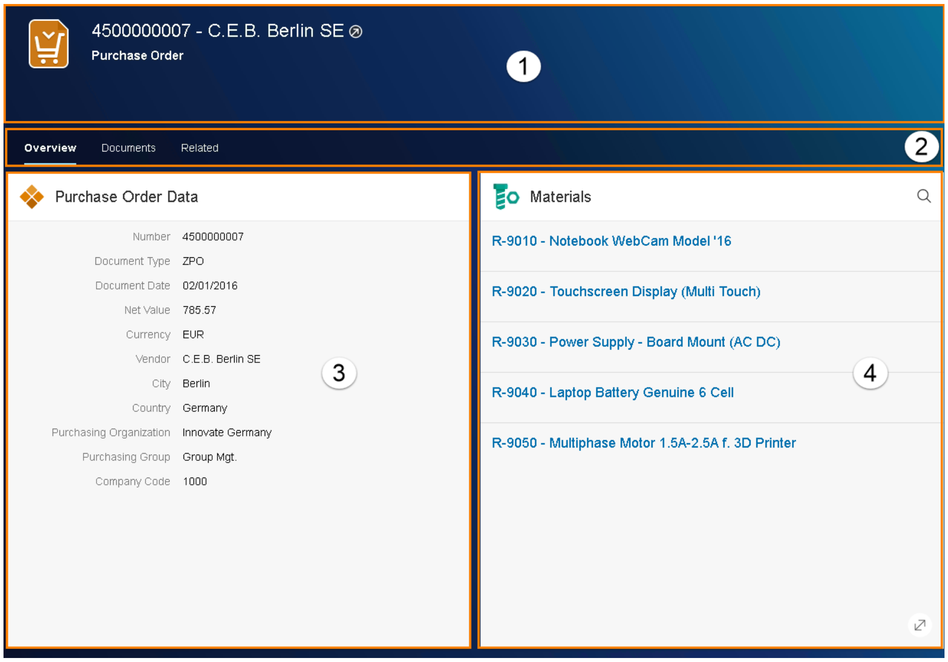
By changing the configured tiles, each business workspace can be customized to reflect the content managed in that workspace. Each business workspace includes the following interface components:

Header tile
A Header tile always appears at the top of the business workspace. At minimum it shows the name of the business workspace and a generic icon, which you can replace with your own icon. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Tabs
Each business workspace can include one or more tabs. Each tab can have a custom name and can include one or more tiles.

Other tiles
Each tab may include multiple tiles. Each tile may each appear one or more times and is configured to reflect the content it handles. Each tile will have an explicit name or a filter that controls the content it displays. For example, if you have a **Related Workspaces** tile that displays vendors, the tile will be titled **Vendor** and will list the available vendors that are managed in different business workspaces.

Example 2-1: Configured business workspace



The areas of this business workspace are:

1. **Header** tile with name and icon of the business workspace. A link provides access to a connected business application.
2. Tabs that contain further tiles are configured for the business workspace. The **Overview**, **Documents**, and **Related** tabs are defined for this business workspace.
3. **Metadata** tile, called **Purchase Order Data**. It lists the metadata for the business workspace.
4. **Related workspaces** tile, called **Materials**. This tile lists additional business workspaces that are linked to this workspace. Each material listed is a separate business workspace.

The layout and available information depend on the tiles that are added and on the filter that is configured for every tile.

Available tiles and their features are described in the following sections.

2.3.1 Viewing the workspace reference

You can view the business object that is referenced by the business workspace. Depending on your permissions, you can also edit the data.

To view the workspace reference

1. From the Function menu of the business workspace, select **Properties**.
2. Navigate to the Reference tab. The value of the **Reference object** label displays the business object for the Business Workspace.

Cross-application scenarios

If a cross-application scenario is configured in your system, it depends on the configuration of the BO Type which business object is displayed. For example, business objects for a vendor and a customer share the same business workspace. Your system may be configured to always display the vendor business object when you navigate to **Properties** page of the Business Workspace. For more information, ask your system administrator.

Tip: The same applies to the **Reference object** displayed in **Manage Business Object** dialog on the OpenText Documentum CM interface.

2.3.2 Creating a business workspace manually

In many cases, business workspaces are created automatically, for example, when a business object in the SAP system was created. You system, however, may be configured to let you create a business workspace manually.

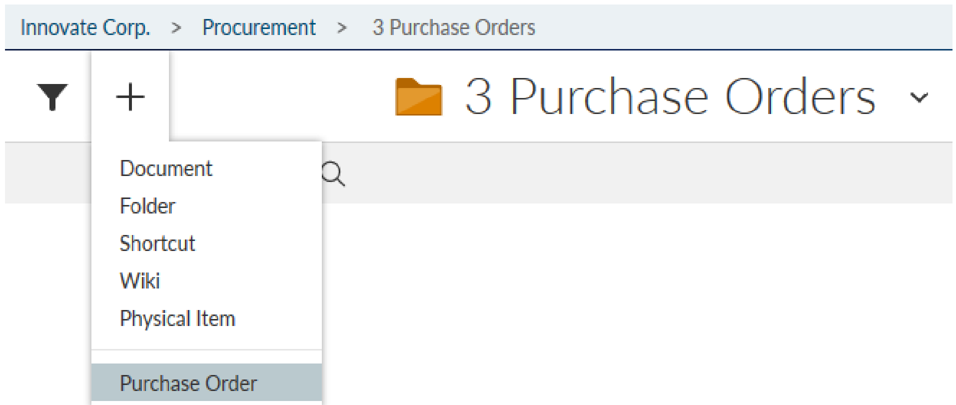
It depends on a number of factor if you can create a business workspace:

- You must have sufficient permissions.
- The folder in which you want to create a business workspace must be configured for it. Also it depends on the configuration, which type of business workspace can be created in a folder.

To check if you can create a business workspace in a folder:

1. Click **Add item** +.

   If you do not see this icon, you do not have sufficient permissions in this folder.



2. Below standard options like **Document** or **Folder**, you should see a workspace type.

3. Select the workspace type.

To create a business workspace:

1. From the **Add item** + menu, click the workspace type.

2. In the **Reference** section, click **Search** to find the business object for which you create the business workspace.

3. Enter search criteria and click **Search**.

4. In the result list, find you business object and click it. You can only select a business object, which is not already connected to a business workspace.

   The attributes of the business workspace are filled with the metadata of the business object.

5. You can **remove** the business object or **replace** it with another one.

2.3.3 Header tile

The **Header** tile shows the name of the business workspace and an icon.

Depending on the configuration, it may also show the workspace type, status information, an activity feed, and some significant metadata. If you open a second or third tab, the **Header** tile condenses into a smaller tile.

You can perform basic operations such as viewing attributes on the **Properties** page and marking the business workspace as a favorite. See *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*. You can also change the workspace icon. See *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*. With sufficient permissions, you can also view, add, and delete comments, and reply to other's comments. See *OpenText Content Management - Smart View User Guide (CSSUI-UGD)*.

The table below lists all status icons and their description:

View Record details
An RM classification has been added to the business workspace. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Official
The business workspace is finalized. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Hold
An item is prevented from being deleted. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Cross-reference
A cross-reference has been applied. Clicking the icon opens the related item. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Confidential
The business workspace is only accessible to the owner and the user performing the Confidential action. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Missing Documents
At least one document is missing. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*. You can upload missing documents directly using the **Upload** button.

Outdated Documents
At least one document has reached the configured expiration date. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*. You can upload outdated documents directly using the **Upload** button.

In Process Documents
At least one document has been submitted and sent to the Inbox of the HR Administrator as task. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

Processing updates
A transmittal workspace is in process. Hover over the icon to see additional status information. See section 5.5.12 “Processing a Transmittal” in *OpenText Content Management for Engineering - Smart View User Help (CSENG-H-UXE)*.

Processed
A transmittal workspace is processed. Hover over the icon to see additional status information. See section 5.5.12 “Processing a Transmittal” in *OpenText Content Management for Engineering - Smart View User Help (CSENG-H-UXE)*.

Processing failed
At least one validation or processing error occurred in a transmittal workspace. Hover over the icon to see additional status information. See section 5.5.12 “Processing a Transmittal” in *OpenText Content Management for Engineering - Smart View User Help (CSENG-H-UXE)*.

	Core share sync pending An item shared with OpenText Core Share is in a pending state. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.
	Core share requires approval An item placed in OpenText Core Share is waiting for approval to be shared. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.
	Core share sync success An item placed in OpenText Core Share is synchronized. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.
	Core share sync error An item placed in OpenText Core Share is not synchronized. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.
	Workspace is locked The business workspace cannot be edited. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.
	Subscribed You get notifications for changes made in this business workspace. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

2.3.4 Related Workspaces tile

The **Related Workspaces** tile shows business workspaces that are related to the currently opened business workspace. You see the icon and name of the related workspace and selected attributes. You can add and remove relationships between business workspaces.

For information about relationships, see *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

If configured and only for devices with a mouse, you may see a preview of the related workspace. Point to the related business workspace to see more information in a preview pane.

If a business application is connected, you can click a link to open the business object in the business application.

You can perform basic operations on this tile, such as searching for a workspace name and opening the expanded view. See section 1.18 “Tiles overview” in *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

2.3.5 Metadata tile

The **Metadata** tile displays information about the business workspace, which is stored in category attributes. Attributes can be edited manually, or they can be filled automatically with data from a business application. If the metadata originates from a business application, you cannot edit it.

To edit an attribute, click the **Edit** button. If you are using a device without a mouse, touch and hold the attribute field to open it for editing.

In addition, the **Metadata** tile optionally displays workspace type names with links to related workspaces. You can click a link to open a related workspace. It is possible to show parent relations for multiple workspace types. If a workspace has multiple parent relations of a configured workspace type, only one random relation is displayed.

2.3.6 Document tile

The OpenText Documentum CM tile is an iframe to your OpenText Documentum CM system. This means that you are working and seeing the OpenText Documentum CM interface if you are in this area of the screen.

2.4 Working in the Document tile

OpenText Documentum CM handles three types of content:

- *Cabinets* are folders located at the highest level of the repository.
- *Folders* are containers for content and organize the repository.
- *Files* can be of any format type and include applications, scripts, video files, audio files, and documents.

Note: If a **Lock** icon appears beside the **Name** of the content in the Doclist, it is checked out for editing either by you () or another user (). Point to the **Lock** icon to see which user checked out the content.

2.4.1 Content actions

This section describes the actions you can perform on content items. Point to an item and click the action on the **Inline Action Bar**. You might need to click the **More actions** button . In most cases, you can perform these actions on multiple items at once by selecting the items and clicking the action on the **Action Bar** above the item list.

Note: Some of the actions might not be supported depending on your permissions and your Smart View configuration.

View content

Click a content item. The item opens in the appropriate viewer or a local copy is downloaded. Alternatively, you can click **View Native Content** in the menu to ensure you download the item in its native format.

If configured by your administrator, you can open an item in an in-place viewer by pointing to the item and clicking **View** on the **Inline Action Bar**.

Maximize the in-place viewer to interact with annotations and Changemarks in the item.

Open content in a new window

Point to an item and select **Open in a new window** to open the item in a new browser window.

This option can also be configured to open the item in a new window with a specific viewer.

Tip: You can save or share the URL of this window for easy access to this item.

View content properties

Point to an item and click **Properties** .

Depending on the item, a preview might appear. Click to display the preview if it is closed.

To view the properties of a folder, click beside the folder name, then click **Properties**.

Scroll through the **Properties** page or click the sub-headings at the top of the page to navigate to the different sections.

Copy link

Point to an item and click **Copy link** to copy a link to the item to the clipboard. To copy links to multiple items, select the items and click **Copy link** on the **Action Bar**.

When you click a copied link, an **Overview** page opens. Click **Open** to open the item in a viewer, or download it if the type is not supported.

You can also copy a link to an older version of an item. Click the **Show filters** button and click **All versions** under **Filter** in the **Refine by** pane first.

When you click a link to an older version of an item, an **Overview** page also opens. Note, however, that the page is for the *current* version of the item, so clicking **Open** opens the current version of the item. To open the older version of the item, click the **View original** link, which includes the version number.

Depending on your configuration, clicking a link to the current version of an item might open the item directly in a viewer. In addition, clicking a link to an older version of an item might open an **Overview** page for that older version instead of for the current version. Clicking **Open** in the page opens that older version of the item. If you want, you can also open the current version of the item from the page by clicking the **View current** link.

Share content externally

Point to an item and click **Share** to:

- **Email**: Copy a link to the item into an email.

  Notes

  – The ability to share multiple items in the Doclist through email is limited. If an error message appears, limit your selection and try again. You might need to split the share operations across multiple emails.

  – For more information on the behavior of an email link when clicked, see Copy link.

- Select the check box next to an item to access the **Share** sub-menu, which contains more sharing options:

  – **OpenText Core Share**: Share selected items to OpenText Core Share.

  – **Manage share**: Manage the permissions and other rules for sharing the selected item.

  – **Stop share**: Stop sharing the selected item.

  In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Print

Point to an item and click **Print**. In some cases, an overlay or watermark appears on the output.

Note: In the Thin content transfer mode, the item is downloaded by your browser so you can print it later.

Edit online

Point to an item and click **Edit online**. The item opens in a Microsoft 365 app where you can edit it. In addition, other users can also open the item and make changes alongside you. Changes are checked in automatically when all editing users have closed the item.

This option only appears for files that you can edit in Microsoft 365 and requires that Microsoft 365 online editing and co-authoring has been configured.

For more information see [xref to non-existent element "edit-ms365"].

Check out content

Point to an item and click **Checkout**. If configured in your environment, you might also be able to check out the item by clicking **Edit**. If any business rules prevent or require your confirmation, a dialog box appears. Otherwise a message appears at the top of the page notifying you of the success or failure of your item checkout.

A blue lock icon appears next to the item in the Doclist to indicate that the content is currently locked by you.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Note: When you check out an item, it is automatically downloaded to your default download directory.

Check in content

Point to an item you currently have checked out and click **Check in** to check in the item (with any changes you have made). You are prompted to upload a new version of the item and, in some cases, a pane appears asking you to update item and version properties.

A message appears on the header notifying you of any special checkin messages and the success or failure of your item checkin.

Cancel checkout

Click a checked out item's blue lock icon or point to the item and click **Cancel checkout** to cancel your checkout without committing any changes.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

View permissions

Point to an item and click **Permissions** to open the **Permissions** page. Or, when viewing the **Properties** page of an item, click the **Down Arrow** button and select **Permissions**.

The page shows your permissions on the item, extended permissions, and the item security name. Point to a permission to see full permission details. Enter the name of a user or group to look up their permissions.

Add a new version

Point to an item and click **Add Version** to add a new version of the item. The current version is locked and you are able to browse for a new version of the item. When you select the new item, a dialog box might appear asking you to describe the version you are adding, including the new version number, and to decide if the new version should be considered the current version. When the new version is uploaded, the item is automatically checked in.

Alternatively, you can drag a new version of an item directly from your computer to the current content in a Doclist.

A message appears on the header notifying you of the success or failure of your version upload.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

The following operations cannot be performed on the item until the **Add version** process completes: delete, cancel check out, and lifecycle state change.

Tip: To view all versions of an item, click the **Show filters** button and click **All versions** under **Filter** in the **Refine by** pane. To view a summary of the item's versions on the **Versions** page, click any of the item's version numbers in the **Versions** column.

Download content

Point to an item and click **Download** to download a copy to your computer.

To create and download a ZIP file of multiple items, select the files and folders you want to download and then click **Download**. A dialog box appears that allows you to rename the ZIP file and add an encryption password. It also lists any files that could not be added to the ZIP file because of your configuration. If the list is large enough, you can copy the list of excluded files to your clipboard in CSV format.

Notes

- Depending on your configuration, you might have limits on the number of files, file types, or maximum total file size that you can download.
- You cannot download empty folders.
- When you download a folder, sub-folders are not included unless you select the **Include all Subfolders** option.
- Depending on the size of the ZIP file and the number of files included, Smart View might need time to process and create the ZIP file. When the ZIP file is ready, it will begin to download.
- Zipping and downloading is a background process, so you can refresh or navigate to other pages without interruption. You can create and download only one ZIP file at a time.
- Files with PDF configuration are processed before being added to the ZIP file.

- The ZIP file includes a CSV manifest file that lists all the files and folders contained in the download.

Export file and folder properties

The **Export properties** option allows you to download a CSV manifest file that lists all the files and folders that you select. The file includes all the column details you have added to the current list.

To download a properties file, select one or more files and folders and then click **Export properties**. You can also select files from search results.

If you select only files, the download begins immediately. If you select a folder, a dialog box appears allowing you to select **Include properties for sub-folders**.

View content renditions

Select an item and click **Renditions** to open the item's **Renditions** page. Or, when viewing and item's **Properties** page, click and click **Renditions**.

On this page, you can view a list of any different formats available for a content item. For example, an item that is a Microsoft® Word document might have a rendition that is a PDF version of the file. Depending on a rendition's format, you can click it to open it in a viewer.

Note: Annotations are not available when viewing a rendition in OpenText™ Intelligent Viewing.

Point to a rendition to display the **Inline Action Bar** or select one or more renditions to display the **Action Bar**. The options on the bars allow you to perform actions, such as export a rendition and delete a rendition.

Import rendition

To import a rendition of an item, point to the item, click **Import rendition**, and select the file to import. The **Format** list in the **Add rendition** dialog box is automatically populated. If available, you can choose a different format from the list. You can also select a different file to upload from the **Upload from file** field. To import the rendition, click **Add**. To view the new rendition on the **Renditions** page, click the **Go to renditions** link in the **Renditions uploaded** message that appears on the header.

Notes

- Each version of a content item can have its own set of renditions.
- If the format of a new rendition is the same as that of an existing rendition, the existing rendition is replaced with the new one.

View content locations

Select an item and click **Locations** to open the item's **Locations** page.

Alternatively, when viewing an item's **Properties** page, click and select **Locations**.

On this page, you can see where the item is located in the repository and if it is included in any virtual documents. Click an item to go to the location.

Point to a location to display the **Inline Action Bar** or select one or more locations to display the **Action Bar**. The options on the bars allow you to perform actions, such as view properties.

Export content locations

When viewing a content item’s locations in the **Locations** page, you can export and download the locations as a Microsoft® Excel® spreadsheet (.xlsx).

To export the locations, click the **Export** button on the **Locations** page. In the **Export list** dialog box, enter a **Name** for the file and click **Export**.

All of the item’s locations are exported, including virtual documents. Each location in the spreadsheet includes the path, the type of location (**Folder** or **Virtual document**), and a link to the location in the repository.

Work with content versions and relations

When viewing the properties of a content item on the **Properties** page, click next to **Properties** and select **Versions** (all the item’s versions) or **Relations** (a list of the items that are related to the item).

On the **Versions** or **Relations** page, point to an item to display the **Inline Action Bar** or select one or more items to display the **Action Bar**. The options on the bars allow you to perform actions, and the actions that are available depend on the item and your environment’s configuration.

For more information about relations, see “Content relations” on page 29.

Copy and paste content

Point to an item and click **Copy**. Navigate to the destination folder, click , and then click **Paste**.

Note: In some cases, pasting content from one location to another prompts Smart View to launch the create new content workflow, where need to describe the content.

Delete content

Point to an item and click **Delete**. You can delete cabinets, folders, and documents if you have the right permissions. You cannot delete checked out files.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Note: Depending on your configuration, Smart View stores items that you have deleted in a recycle bin. For more information, see *OpenText Documentum Content Management - Smart View User Guide (EDCCL-UGD)*.

Comment on content

In a Doclist or search results list, click . Type your comment, then click **Post**. You can add comments at the folder or file level.

Click **Reply** under an existing comment to reply directly to that comment.

Favorite content

In a Doclist, click . You can add folders or files as favorites.

Import file from

Point to an item and select **Import File From** to launch the import process using the selected item as a model. See "Inherit from existing content to create or upload" on page 29 for more information.

Create file from

Point to an item and select **Create File From** to launch the content creation process using the selected item as a model. See "Inherit from existing content to create or upload" on page 29 for more information.

View a virtual document or a virtual document snapshot

Point to a virtual document or a virtual document snapshot and select **Display outline** or **Display snapshot**. See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)* for more information.

Convert content to a virtual document or convert a virtual document back to content

Point to an item and select **Convert to Virtual Document**. Virtual documents can be converted back to simple files by selecting **Convert to simple document**.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)* for more information.

Create a snapshot of the virtual document

In a Doclist or in the virtual document tree, point to a virtual document and click **Take a snapshot**. If necessary, edit the default **Title** of your new snapshot and click **Save**. See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)* for more information.

Create content relation

In a Doclist, point to an item and click **Create relation**. In the **Create Relation** pane, choose a relation type from the **Select relation** list, then click + to choose one or more items to add to the relation. Click **Add**. Type a **Comment** that describes the relation, then click **Create**. If you need to, you can remove a selected item by pointing to it and clicking ×.

See "Content relations" on page 29 for more information.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Send content to a workflow

In a Doclist, point to the document you want to send to the workflow and click **Workflows > (Name of your workflow)**. If you need to select multiple items, click the check boxes beside the items and click **Workflows** on the **Action Bar**.

View a document's workflows

Point to a document that is associated with a workflow and click **Workflow History** or **View Workflows** (your environment might have a different name). The **Workflows** list opens displaying the document's associated workflows.

If the **Show markup status** switch is turned on in **Settings**, a status icon appears in a Doclist for documents that have workflows associated with them. Point to the icon to view the number of associated workflows. Click the icon to view the associated workflows in the **Workflows** list.

Send content to a lifecycle state

In a Doclist, navigate to the item you want to send to a lifecycle state, then point to the item and click **Lifecycle > (Name of your Lifecycle state)**.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

View content audit report

Point to an item and click **Audits** to open the item's **Audit** page. Or, when viewing the **Properties** page of an item, click and select **Audit**.

The audit report records events that occur to an item. Your administrator configures which events are recorded, which can include when an item is created, opened, or modified, or if its attribute values have changed. The audit report includes details about the event, such as who performed it and when it occurred. You can view the audit report only if your administrator provides you access.

Export audit report

When viewing a content item's audit report in the **Audit** page, you can export and download the report as a Microsoft® Excel® spreadsheet (.xlsx).

To export the report, click the **Export** button on the **Audit** page. In the **Export list** dialog box, enter a **Name** for the file and click **Export**.

Apply a retention policy

A retention policy retains one or more items, such as cabinets, folders, and documents, according to conditional or chronological settings, or a mix of both, using lifecycles. It can protect documents from potential or inadvertent deletion and force them to undergo aging in a controlled manner.

In a Doclist, select one or more items and click **Apply retention policy**. In the **Select retention policy** panel, select a retention policy. To edit an event, in the **Global Events** table, point to an event and click **Edit** . In the **Edit Event** dialog box, you can update **Event Description**, **Event Date**, and **Event Message**. Click **Add** to select the contacts whom you want to be notified about the event. Click **Yes**. Click **Next**. In the **Review phases** panel, review the settings configured for each phase of the policy and click **Apply**. If you need to modify any of these settings, contact your administrator.

Note: To access the retention policy menu options for a selected document, you must have the RELATE permission on the document.

Apply retention markups

A retention markup is a tag that is applied to a content item to prevent any further action or processing on the item.

In a Doclist, select one or more items and click **Apply retention markup**. In the **Apply retention markups** panel, click in **Retention markups**. In the **Select retention markups** dialog box, select one or more markups and click **Select**. Type a reason in **Reason for applying markup** and click **Apply**.

View retention policy

In a Doclist, select an item and click **View retention policy** to open the **Retention policies** page. To remove a policy, select the policy and click **Remove**.

View retention markups

In a Doclist, select an item and click **View retention markup** to open the **Retention markups** page. To remove a markup, select the markup and click **Remove**.

2.4.2 Add a folder or a cabinet

1. Depending on whether you want to add a folder or a cabinet, do one of the following:
   - If you want to add a folder, in an existing folder, click + > **Add folder**.
   - If you want to add a cabinet, which can only be added at the repository level, in a repository, click + > **Add cabinet**.
2. Type the name of the folder or cabinet and click or press **ENTER**.
3. If you are adding a folder, and if there are multiple types of folders available in your configuration, the **New folder** pane appears.

   Choose the **Type** of folder, then provide any additional required folder properties.

4. Click **Add**.

   A message appears on the header when the folder or cabinet has been created.

2.4.3 View and edit content properties

You can view and edit a content item's properties on the **Properties** page. Editing properties allows you to control content relationships, automated behavior, and the ability to find content in a search, among other uses.

For example, administrators can configure Smart View so that content with the Documentation keyword is automatically processed as documentation. You can create or import content as a draft and then convert the content for processing as documentation. To do this, you can edit the properties of the content.

Administrators configure and create default properties templates and **Properties** pages. You assign default properties and property fields to content by selecting a creation profile during content import or creation.

Edit content properties:

1. To view a content item's properties, point to the item in a Doclist and click **Properties**. Scroll through the **Properties** page or click the sub-headings at the top of the page to navigate to your desired section.

   Note: You might not have permission to edit a **Properties** page or certain content properties. Contact your administrator for more information.

2. Click **Edit** at the top of the page to switch to edit mode.

   Tips

   - Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode, click . Expanded mode is available in both edit and view modes.
   - To re-size columns in a grid, point to a column divider on the header and drag the arrows. To revert to the default size, double-click the column divider or clear your cache. Column re-sizing is available in both edit and view modes.

3. When you are finished making your edits, click **Save**.

   Smart View reviews your changes and lets you know if the data you entered is valid.

   Note: Depending on how the **Properties** page is configured, you might also need to complete an electronic signature to save property changes. Follow the guided steps at the top of the page to complete your signature.

2.4.4 Upload content

You can upload content to your repository if you have the right permissions.

Depending on your Smart View configuration, you can upload content using a dedicated **Upload** tile on the Landing page or the **Add item** menu + in a folder.

Your Smart View configuration might also include Preset tiles with pre-defined content upload rules built in, usually based on content type. For example, your administrator might create a Preset tile for uploading weekly maintenance sheets and give it the title *Weekly Maintenance Sheets Go Here*.

Upload content:

1. In a folder, click + > **Upload file** or drag content to the main folder or sub-folders in the browser window.

   The **Upload** pane appears, which summarizes the files that are already queued for upload, if any, and allows you to upload additional content.

2. To add files, drag them to the pane or click + and select them from your computer. You can rearrange the upload processing order of the files by dragging them to new spots in the **Files** list. To remove a file from the list, point to the file and click ×.

3. Click **Continue**.

   Depending on your Smart View configuration, the following panes might appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk:

   - **Select type**: To select a creation profile that will be used for all the files you queued for upload, click **Custom** and then select a category from the **Category** list. Depending on your choice and configuration, you might need to provide further information about the category before continuing. As part of the category properties, you might be able to select content in your repository with properties you want the uploaded files to inherit. To do so, select the content in **Use source content** and then select the **Properties** check box under **As blueprint for**. You might also be able to select from a **Preset** list to skip this process.

     Note: If you choose to select content with properties you want the uploaded content to inherit, the process creates a relation between the source content and the uploaded content, and the relation type is **Provides info to/Gets info from**.

   - **Edit properties**: If there is a property page associated with the type of files you have selected, this pane allows you to fill in some property information for your new files. You can rearrange the properties processing order of the files by dragging them to new spots in the list of files. ● indicates a file that does not have its required properties verified yet. indicates a file that has been verified. If the remainder of the files in the list share property attributes with the file you are currently editing, click to apply the properties to the rest of the files below in the list.

Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode, click . Expanded mode is available in both edit and view modes.

Note: The **Apply to the below files** option might be enabled by default depending on your Smart View configuration.

4. Click **Continue** to upload the files.

   A message appears on the header when your files have been uploaded.

   Note: A minimize option, available on either the side pane or the progress pane, allows you to run a process in the background and continue working. For example, you can submit a process in the side pane and then see a progress pane containing a minimize option.

   In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

2.4.5 Create new content

You can create new content in Smart View if your administrator has granted you permission and has configured creation profiles that are applied when you create the content.

Depending on your Smart View configuration, you can add new content using a dedicated **Add File** tile on the Landing page or the **Add item** menu in a folder.

Your Smart View configuration might also include Preset files with pre-defined content creation rules built in, usually based on content type. For example, your administrator might create a Preset tile for adding weekly maintenance sheets and give it the title *Weekly Maintenance Sheets Go Here*.

Create new content:

1. In a folder, click + > **Add file**.

Depending on your Smart View configuration, the following panes might appear, requiring you to specify the content you are adding. Complete all fields marked with a red asterisk:

- **Select type**: This pane allows you to choose the type of content to add through the selection of various creation profiles. You might be able to select from a **Preset** or **Recent** list, create a **Custom** type in the **Create type** screen, or edit a **Preset** or **Recent** type. Click beside a type to go to the **Edit type** pane, where you can edit the type's properties. When creating a **Custom** type or editing a **Preset**, you might be able to select content in your repository with content or properties you want the new content to inherit. To do so, select the content in **Use source content** and then select the **Properties** or **Content** check box under **As blueprint for**.

  Note: If you choose to select content with content or properties you want the new content to inherit, the process creates a relation between the source content and the new content. If you choose to inherit content, the relation type is **Has as copy/Is a copy of**. If you choose to inherit properties, the relation type is **Provides info to/Gets info from**.

- **Edit Properties**: If there is a property page associated with the type of content you have selected, you might need to fill in some property information for your new content item, such as **Name**, **Title**, and **Subject**.

  Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode, click . Expanded mode is available in both edit and view modes.

- **Select template**: This pane allows you to select a standard **Preset** or **Recent** template for your new content, if your administrator has made them available. To view the templates in **Gallery View**, which provides a thumbnail preview of each template, click .
- **Add linked document to create**: This pane allows you to optionally create a second content item as a peer relation. To create the item, click the **Link peer** link. As with the first item, you are prompted to edit properties and select a template.

2. On the **Edit file** screen, click one of the following options:

   - **Edit now**: Click this option to edit the new content immediately as part of the creation process. The new content item is checked out for you to edit. On the **Finish** screen, click **Update now** to upload an update for the new item and check it in, or click **Update later** to access the checked out item at a later time.

- **Edit later**: Click this option to edit the content item at a later time.

A message appears on the header when your new content has been created in Smart View.

Note: The administrator can turn these editing options on or off.

3. Optional Click the message for status information.

2.4.6 Inherit from existing content to create or upload

Depending on your Smart View configuration, it might be possible to select existing content in your repository and use it as a sample of content or properties to inherit when you create new content or upload content.

1. Navigate to the content item you want to use as your sample. In a Doclist, select the check box next to the item and click **Create file from** or **Import file from** on the menu.

   Note: The names of the menu items are custom and might not exactly match the examples provided here. Contact your administrator for more information.

2. When the wizard for creating or uploading content appears, complete the process as described in "Create new content" on page 27 or "Upload content" on page 26.

   Note: The content you select in the first step is the source content that is automatically populated in the wizard's **Use source content** field in the **Create type** pane.

2.4.7 Content relations

Relations help organize and process repository content.

2.4.7.1 Work with content relations

View a content item's relations:

1. Point to the item and click the **Properties** button.

2. On the **Properties** page, click and click **Relations**.

   The relations are listed on the **Relations** page.

   Note: You can view the relations that are created in OpenText Content Management and transferred to OpenText Documentum Content Management (CM).

   Relations can be created between workspaces of a single repository. They cannot be created across multiple repositories.

Note: For more information on viewing and editing properties, see "View and edit content properties" on page 25.

2.5 Working in OpenText Content Management tiles

2.5.1 Move a business workspace

If you have the *Read* permission on the workspace and subitems, and if configured, you can move business workspaces with all its content to another location like any other item. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

The new location can be a folder or another business workspace. The new location, however, must have the same classification as the business workspace. You can check the classification in the properties of the business workspace and compare it with the classification of the target location. Alternatively, your business administrator may have configured the system so that you can move business workspaces to locations without matching classification.

Reference attributes are automatically re-generated when the business workspace is moved.

Note: It is not supported to move a business workspace into a project.

2.5.2 Copy a business workspace

If you have the *Read* permission on the workspace and subitems, and if configured, you can copy business workspaces with all its content to another location like any other item. See *OpenText Content Management - Smart View User Help (CSSUI-H-UGD)*.

The new location can be a folder or another business workspace. The new location, however, must have the same classification as the business workspace. You can check the classification in the properties of the business workspace and compare it with the classification of the target location. Alternatively, your business administrator may have configured the system so that you can copy business workspaces to locations without matching classification.

Reference attributes are automatically re-generated when the business workspace is copied.

Notes

- You cannot copy a business workspace that has a reference to a business object.
- When you copy a folder that contains business workspaces, these business workspaces are not copied.

- When you copy a business workspace for which Content Aviator is manually enabled, this setting is not copied to the new business workspace.
- It is not supported to copy a business workspace into a project.

2.6 Navigating to OpenText Documentum CM workspace

To open OpenText Documentum CM workspace from OpenText Content Management workspace:

1. Go to the OpenText Content Management workspace.
2. Click the more options button .
3. Select **Open in Documentum**.

Chapter 3

Working in Smart View Client

The chapter describes mainly functionality that is added by OpenText Documentum CM for SAP Solutions.

3.1 Working in the Document tile

OpenText Documentum CM handles three types of content:

- *Cabinets* are folders located at the highest level of the repository.
- *Folders* are containers for content and organize the repository.
- *Files* can be of any format type and include applications, scripts, video files, audio files, and documents.

Note: If a **Lock** icon appears beside the **Name** of the content in the Doclist, it is checked out for editing either by you ( ) or another user ( ). Point to the **Lock** icon to see which user checked out the content.

3.1.1 Content actions

This section describes the actions you can perform on content items. Point to an item and click the action on the **Inline Action Bar**. You might need to click the **More actions** button . In most cases, you can perform these actions on multiple items at once by selecting the items and clicking the action on the **Action Bar** above the item list.

Note: Some of the actions might not be supported depending on your permissions and your Smart View configuration.

View content

Click a content item. The item opens in the appropriate viewer or a local copy is downloaded. Alternatively, you can click **View Native Content** in the menu to ensure you download the item in its native format.

If configured by your administrator, you can open an item in an in-place viewer by pointing to the item and clicking **View** on the **Inline Action Bar**.

Maximize the in-place viewer to interact with annotations and Changemarks in the item.

Open content in a new window

Point to an item and select **Open in a new window** to open the item in a new browser window.

This option can also be configured to open the item in a new window with a specific viewer.

Tip: You can save or share the URL of this window for easy access to this item.

View content properties

Point to an item and click **Properties**.

Depending on the item, a preview might appear. Click to display the preview if it is closed.

To view the properties of a folder, click beside the folder name, then click **Properties**.

Scroll through the **Properties** page or click the sub-headings at the top of the page to navigate to the different sections.

Copy link

Point to an item and click **Copy link** to copy a link to the item to the clipboard. To copy links to multiple items, select the items and click **Copy link** on the **Action Bar**.

When you click a copied link, an **Overview** page opens. Click **Open** to open the item in a viewer, or download it if the type is not supported.

You can also copy a link to an older version of an item. Click the **Show filters** button and click **All versions** under **Filter** in the **Refine by** pane first.

When you click a link to an older version of an item, an **Overview** page also opens. Note, however, that the page is for the *current* version of the item, so clicking **Open** opens the current version of the item. To open the older version of the item, click the **View original** link, which includes the version number.

Depending on your configuration, clicking a link to the current version of an item might open the item directly in a viewer. In addition, clicking a link to an older version of an item might open an **Overview** page for that older version instead of for the current version. Clicking **Open** in the page opens that older version of the item. If you want, you can also open the current version of the item from the page by clicking the **View current** link.

Share content externally

Point to an item and click **Share** to:

- **Email**: Copy a link to the item into an email.

  Notes

  – The ability to share multiple items in the Doclist through email is limited. If an error message appears, limit your selection and try again. You might need to split the share operations across multiple emails.

- For more information on the behavior of an email link when clicked, see Copy link.

- Select the check box next to an item to access the **Share** sub-menu, which contains more sharing options:

  - **OpenText Core Share**: Share selected items to OpenText Core Share.
  - **Manage share**: Manage the permissions and other rules for sharing the selected item.
  - **Stop share**: Stop sharing the selected item.

  In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Print

Point to an item and click **Print** . In some cases, an overlay or watermark appears on the output.

Note: In the Thin content transfer mode, the item is downloaded by your browser so you can print it later.

Edit online

Point to an item and click **Edit online** . The item opens in a Microsoft 365 app where you can edit it. In addition, other users can also open the item and make changes alongside you. Changes are checked in automatically when all editing users have closed the item.

This option only appears for files that you can edit in Microsoft 365 and requires that Microsoft 365 online editing and co-authoring has been configured.

For more information see [xref to non-existent element "edit-ms365"].

Check out content

Point to an item and click **Checkout** . If configured in your environment, you might also be able to check out the item by clicking **Edit**. If any business rules prevent or require your confirmation, a dialog box appears. Otherwise a message appears at the top of the page notifying you of the success or failure of your item checkout.

A blue lock icon appears next to the item in the Doclist to indicate that the content is currently locked by you.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Note: When you check out an item, it is automatically downloaded to your default download directory.

Check in content

Point to an item you currently have checked out and click **Check in** to check in the item (with any changes you have made). You are prompted to upload a new version of the item and, in some cases, a pane appears asking you to update item and version properties.

A message appears on the header notifying you of any special checkin messages and the success or failure of your item checkin.

Cancel checkout

Click a checked out item's blue lock icon or point to the item and click **Cancel checkout** to cancel your checkout without committing any changes.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

View permissions

Point to an item and click **Permissions** to open the **Permissions** page. Or, when viewing the **Properties** page of an item, click the **Down Arrow** button and select **Permissions**.

The page shows your permissions on the item, extended permissions, and the item security name. Point to a permission to see full permission details. Enter the name of a user or group to look up their permissions.

Add a new version

Point to an item and click **Add Version** to add a new version of the item. The current version is locked and you are able to browse for a new version of the item. When you select the new item, a dialog box might appear asking you to describe the version you are adding, including the new version number, and to decide if the new version should be considered the current version. When the new version is uploaded, the item is automatically checked in.

Alternatively, you can drag a new version of an item directly from your computer to the current content in a Doclist.

A message appears on the header notifying you of the success or failure of your version upload.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

The following operations cannot be performed on the item until the **Add version** process completes: delete, cancel check out, and lifecycle state change.

Tip: To view all versions of an item, click the **Show filters** button and click **All versions** under **Filter** in the **Refine by** pane. To view a summary of the item's versions on the **Versions** page, click any of the item's version numbers in the **Versions** column.

Download content

Point to an item and click **Download** to download a copy to your computer.

To create and download a ZIP file of multiple items, select the files and folders you want to download and then click **Download**. A dialog box appears that allows you to rename the ZIP file and add an encryption password. It also lists any files that could not be added to the ZIP file because of your configuration. If the list is large enough, you can copy the list of excluded files to your clipboard in CSV format.

Notes

- Depending on your configuration, you might have limits on the number of files, file types, or maximum total file size that you can download.
- You cannot download empty folders.
- When you download a folder, sub-folders are not included unless you select the **Include all Subfolders** option.
- Depending on the size of the ZIP file and the number of files included, Smart View might need time to process and create the ZIP file. When the ZIP file is ready, it will begin to download.
- Zipping and downloading is a background process, so you can refresh or navigate to other pages without interruption. You can create and download only one ZIP file at a time.
- Files with PDF configuration are processed before being added to the ZIP file.
- The ZIP file includes a CSV manifest file that lists all the files and folders contained in the download.

Export file and folder properties

The **Export properties** option allows you to download a CSV manifest file that lists all the files and folders that you select. The file includes all the column details you have added to the current list.

To download a properties file, select one or more files and folders and then click **Export properties**. You can also select files from search results.

If you select only files, the download begins immediately. If you select a folder, a dialog box appears allowing you to select **Include properties for sub-folders**.

View content renditions

Select an item and click **Renditions** to open the item's **Renditions** page. Or, when viewing and item's **Properties** page, click and click **Renditions**.

On this page, you can view a list of any different formats available for a content item. For example, an item that is a Microsoft Word document might have a rendition that is a PDF version of the file. Depending on a rendition's format, you can click it to open it in a viewer.

Note: Annotations are not available when viewing a rendition in OpenText Intelligent Viewing.

Point to a rendition to display the **Inline Action Bar** or select one or more renditions to display the **Action Bar**. The options on the bars allow you to perform actions, such as export a rendition and delete a rendition.

Import rendition

To import a rendition of an item, point to the item, click **Import rendition**, and select the file to import. The **Format** list in the **Add rendition** dialog box is automatically populated. If available, you can choose a different format from the list. You can also select a different file to upload from the **Upload from file** field. To import the rendition, click **Add**. To view the new rendition on the **Renditions** page, click the **Go to renditions** link in the **Renditions uploaded** message that appears on the header.

Notes

- Each version of a content item can have its own set of renditions.
- If the format of a new rendition is the same as that of an existing rendition, the existing rendition is replaced with the new one.

View content locations

Select an item and click **Locations** to open the item's **Locations** page.

Alternatively, when viewing an item's **Properties** page, click and select **Locations**.

On this page, you can see where the item is located in the repository and if it is included in any virtual documents. Click an item to go to the location.

Point to a location to display the **Inline Action Bar** or select one or more locations to display the **Action Bar**. The options on the bars allow you to perform actions, such as view properties.

Export content locations

When viewing a content item's locations in the **Locations** page, you can export and download the locations as a Microsoft Excel spreadsheet (.xlsx).

To export the locations, click the **Export** button on the **Locations** page. In the **Export list** dialog box, enter a **Name** for the file and click **Export**.

All of the item's locations are exported, including virtual documents. Each location in the spreadsheet includes the path, the type of location (**Folder** or **Virtual document**), and a link to the location in the repository.

Work with content versions and relations

When viewing the properties of a content item on the **Properties** page, click next to **Properties** and select **Versions** (all the item's versions) or **Relations** (a list of the items that are related to the item).

On the **Versions** or **Relations** page, point to an item to display the **Inline Action Bar** or select one or more items to display the **Action Bar**. The options on the bars allow you to perform actions, and the actions that are available depend on the item and your environment's configuration.

For more information about relations, see "Content relations" on page 47.

Copy and paste content

Point to an item and click **Copy**. Navigate to the destination folder, click , and then click **Paste**.

Note: In some cases, pasting content from one location to another prompts Smart View to launch the create new content workflow, where need to describe the content.

Delete content

Point to an item and click **Delete**. You can delete cabinets, folders, and documents if you have the right permissions. You cannot delete checked out files.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Note: Depending on your configuration, Smart View stores items that you have deleted in a recycle bin. For more information, see *OpenText Documentum Content Management - Smart View User Guide (EDCCL-UGD)*.

Comment on content

In a Doclist or search results list, click . Type your comment, then click **Post**. You can add comments at the folder or file level.

Click **Reply** under an existing comment to reply directly to that comment.

Favorite content

In a Doclist, click . You can add folders or files as favorites.

Import file from

Point to an item and select **Import File From** to launch the import process using the selected item as a model. See "Inherit from existing content to create or upload" on page 47 for more information.

Create file from

Point to an item and select **Create File From** to launch the content creation process using the selected item as a model. See “Inherit from existing content to create or upload” on page 47 for more information.

View a virtual document or a virtual document snapshot

Point to a virtual document or a virtual document snapshot and select **Display outline** or **Display snapshot**. See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)* for more information.

Convert content to a virtual document or convert a virtual document back to content

Point to an item and select **Convert to Virtual Document**. Virtual documents can be converted back to simple files by selecting **Convert to simple document**.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)* for more information.

Create a snapshot of the virtual document

In a Doclist or in the virtual document tree, point to a virtual document and click **Take a snapshot**. If necessary, edit the default **Title** of your new snapshot and click **Save**. See *OpenText Documentum Content Management - Smart View User Help (EDCCL-H-UGD)* for more information.

Create content relation

In a Doclist, point to an item and click **Create relation**. In the **Create Relation** pane, choose a relation type from the **Select relation** list, then click + to choose one or more items to add to the relation. Click **Add**. Type a **Comment** that describes the relation, then click **Create**. If you need to, you can remove a selected item by pointing to it and clicking ×.

See “Content relations” on page 47 for more information.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed**/**Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

Send content to a workflow

In a Doclist, point to the document you want to send to the workflow and click **Workflows > (Name of your workflow)**. If you need to select multiple items, click the check boxes beside the items and click **Workflows** on the **Action Bar**.

View a document’s workflows

Point to a document that is associated with a workflow and click **Workflow History** or **View Workflows** (your environment might have a different name). The **Workflows** list opens displaying the document’s associated workflows.

If the **Show markup status** switch is turned on in **Settings**, a status icon appears in a Doclist for documents that have workflows associated with them. Point to the icon to view the number of associated workflows. Click the icon to view the associated workflows in the **Workflows** list.

Send content to a lifecycle state

In a Doclist, navigate to the item you want to send to a lifecycle state, then point to the item and click **Lifecycle > (Name of your Lifecycle state)**.

In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

View content audit report

Point to an item and click **Audits** to open the item's **Audit** page. Or, when viewing the **Properties** page of an item, click and select **Audit**.

The audit report records events that occur to an item. Your administrator configures which events are recorded, which can include when an item is created, opened, or modified, or if its attribute values have changed. The audit report includes details about the event, such as who performed it and when it occurred. You can view the audit report only if your administrator provides you access.

Export audit report

When viewing a content item's audit report in the **Audit** page, you can export and download the report as a Microsoft Excel spreadsheet (.xlsx).

To export the report, click the **Export** button on the **Audit** page. In the **Export list** dialog box, enter a **Name** for the file and click **Export**.

Apply a retention policy

A retention policy retains one or more items, such as cabinets, folders, and documents, according to conditional or chronological settings, or a mix of both, using lifecycles. It can protect documents from potential or inadvertent deletion and force them to undergo aging in a controlled manner.

In a Doclist, select one or more items and click **Apply retention policy**. In the **Select retention policy** panel, select a retention policy. To edit an event, in the **Global Events** table, point to an event and click **Edit** . In the **Edit Event** dialog box, you can update **Event Description**, **Event Date**, and **Event Message**. Click **Add** to select the contacts whom you want to be notified about the event. Click **Yes**. Click **Next**. In the **Review phases** panel, review the settings configured for each phase of the policy and click **Apply**. If you need to modify any of these settings, contact your administrator.

Note: To access the retention policy menu options for a selected document, you must have the RELATE permission on the document.

Apply retention markups

A retention markup is a tag that is applied to a content item to prevent any further action or processing on the item.

In a Doclist, select one or more items and click **Apply retention markup**. In the **Apply retention markups** panel, click in **Retention markups**. In the **Select retention markups** dialog box, select one or more markups and click **Select**. Type a reason in **Reason for applying markup** and click **Apply**.

View retention policy

In a Doclist, select an item and click **View retention policy** to open the **Retention policies** page. To remove a policy, select the policy and click **Remove**.

View retention markups

In a Doclist, select an item and click **View retention markup** to open the **Retention markups** page. To remove a markup, select the markup and click **Remove**.

3.1.2 Add a folder or a cabinet

1. Depending on whether you want to add a folder or a cabinet, do one of the following:

   - If you want to add a folder, in an existing folder, click + > **Add folder**.
   - If you want to add a cabinet, which can only be added at the repository level, in a repository, click + > **Add cabinet**.

2. Type the name of the folder or cabinet and click ✓ or press **ENTER**.

3. If you are adding a folder, and if there are multiple types of folders available in your configuration, the **New folder** pane appears.

   Choose the **Type** of folder, then provide any additional required folder properties.

4. Click **Add**.

   A message appears on the header when the folder or cabinet has been created.

3.1.3 View and edit content properties

You can view and edit a content item's properties on the **Properties** page. Editing properties allows you to control content relationships, automated behavior, and the ability to find content in a search, among other uses.

For example, administrators can configure Smart View so that content with the Documentation keyword is automatically processed as documentation. You can create or import content as a draft and then convert the content for processing as documentation. To do this, you can edit the properties of the content.

Administrators configure and create default properties templates and **Properties** pages. You assign default properties and property fields to content by selecting a creation profile during content import or creation.

Edit content properties:

1. To view a content item's properties, point to the item in a Doclist and click **Properties** . Scroll through the **Properties** page or click the sub-headings at the top of the page to navigate to your desired section.

   Note: You might not have permission to edit a **Properties** page or certain content properties. Contact your administrator for more information.

2. Click **Edit** at the top of the page to switch to edit mode.

   Tips

   - Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode, click . Expanded mode is available in both edit and view modes.
   - To re-size columns in a grid, point to a column divider on the header and drag the arrows. To revert to the default size, double-click the column divider or clear your cache. Column re-sizing is available in both edit and view modes.

3. When you are finished making your edits, click **Save**.

   Smart View reviews your changes and lets you know if the data you entered is valid.

   Note: Depending on how the **Properties** page is configured, you might also need to complete an electronic signature to save property changes. Follow the guided steps at the top of the page to complete your signature.

3.1.4 Upload content

You can upload content to your repository if you have the right permissions.

Depending on your Smart View configuration, you can upload content using a dedicated **Upload** tile on the Landing page or the **Add item** menu + in a folder.

Your Smart View configuration might also include Preset tiles with pre-defined content upload rules built in, usually based on content type. For example, your administrator might create a Preset tile for uploading weekly maintenance sheets and give it the title *Weekly Maintenance Sheets Go Here*.

Upload content:

1. In a folder, click + > **Upload file** or drag content to the main folder or sub-folders in the browser window.

   The **Upload** pane appears, which summarizes the files that are already queued for upload, if any, and allows you to upload additional content.

2. To add files, drag them to the pane or click + and select them from your computer. You can rearrange the upload processing order of the files by dragging them to new spots in the **Files** list. To remove a file from the list, point to the file and click ×.

3. Click **Continue**.

   Depending on your Smart View configuration, the following panes might appear, requiring you to describe the content you are adding. Complete all fields marked with a red asterisk:

   - **Select type**: To select a creation profile that will be used for all the files you queued for upload, click **Custom** and then select a category from the **Category** list. Depending on your choice and configuration, you might need to provide further information about the category before continuing. As part of the category properties, you might be able to select content in your repository with properties you want the uploaded files to inherit. To do so, select the content in **Use source content** and then select the **Properties** check box under **As blueprint for**. You might also be able to select from a **Preset** list to skip this process.

     Note: If you choose to select content with properties you want the uploaded content to inherit, the process creates a relation between the source content and the uploaded content, and the relation type is **Provides info to/Gets info from**.

   - **Edit properties**: If there is a property page associated with the type of files you have selected, this pane allows you to fill in some property information for your new files. You can rearrange the properties processing order of the files by dragging them to new spots in the list of files. ● indicates a file that does not have its required properties verified yet. indicates a file that has been verified. If the remainder of the files in the list share property attributes with the file you are currently editing, click to apply the properties to the rest of the files below in the list.

Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode, click . Expanded mode is available in both edit and view modes.

Note: The **Apply to the below files** option might be enabled by default depending on your Smart View configuration.

4. Click **Continue** to upload the files.

   A message appears on the header when your files have been uploaded.

   Note: A minimize option, available on either the side pane or the progress pane, allows you to run a process in the background and continue working. For example, you can submit a process in the side pane and then see a progress pane containing a minimize option.

   In the progress pane you can click **Minimize** to run the process in the background so you can continue to work in Smart View. Progress is expressed in either bytes or in **Completed/Failed** items. To maximize, click the progress pane in the header. If the pane is minimized, click the background process indicator to expand all progress panels.

3.1.5 Create new content

You can create new content in Smart View if your administrator has granted you permission and has configured creation profiles that are applied when you create the content.

Depending on your Smart View configuration, you can add new content using a dedicated **Add File** tile on the Landing page or the **Add item** menu in a folder.

Your Smart View configuration might also include Preset files with pre-defined content creation rules built in, usually based on content type. For example, your administrator might create a Preset tile for adding weekly maintenance sheets and give it the title *Weekly Maintenance Sheets Go Here*.

Create new content:

1. In a folder, click + > **Add file**.

Depending on your Smart View configuration, the following panes might appear, requiring you to specify the content you are adding. Complete all fields marked with a red asterisk:

- **Select type**: This pane allows you to choose the type of content to add through the selection of various creation profiles. You might be able to select from a **Preset** or **Recent** list, create a **Custom** type in the **Create type** screen, or edit a **Preset** or **Recent** type. Click beside a type to go to the **Edit type** pane, where you can edit the type's properties. When creating a **Custom** type or editing a **Preset**, you might be able to select content in your repository with content or properties you want the new content to inherit. To do so, select the content in **Use source content** and then select the **Properties** or **Content** check box under **As blueprint for**.

  Note: If you choose to select content with content or properties you want the new content to inherit, the process creates a relation between the source content and the new content. If you choose to inherit content, the relation type is **Has as copy/Is a copy of**. If you choose to inherit properties, the relation type is **Provides info to/Gets info from**.

- **Edit Properties**: If there is a property page associated with the type of content you have selected, you might need to fill in some property information for your new content item, such as **Name**, **Title**, and **Subject**.

  Tip: Depending on your configuration, memo fields might provide a rich text editor. The editor supports font formatting, paragraph formatting, links, and horizontal lines. It also provides an HTML code view and help for keyboard shortcuts. To open the editor in expanded mode, click . Expanded mode is available in both edit and view modes.

- **Select template**: This pane allows you to select a standard **Preset** or **Recent** template for your new content, if your administrator has made them available. To view the templates in **Gallery View**, which provides a thumbnail preview of each template, click .

- **Add linked document to create**: This pane allows you to optionally create a second content item as a peer relation. To create the item, click the **Link peer** link. As with the first item, you are prompted to edit properties and select a template.

2. On the **Edit file** screen, click one of the following options:

   - **Edit now**: Click this option to edit the new content immediately as part of the creation process. The new content item is checked out for you to edit. On the **Finish** screen, click **Update now** to upload an update for the new item and check it in, or click **Update later** to access the checked out item at a later time.

- **Edit later**: Click this option to edit the content item at a later time.

A message appears on the header when your new content has been created in Smart View.

Note: The administrator can turn these editing options on or off.

3. Optional Click the message for status information.

3.1.6 Inherit from existing content to create or upload

Depending on your Smart View configuration, it might be possible to select existing content in your repository and use it as a sample of content or properties to inherit when you create new content or upload content.

1. Navigate to the content item you want to use as your sample. In a Doclist, select the check box next to the item and click **Create file from** or **Import file from** on the menu.

   Note: The names of the menu items are custom and might not exactly match the examples provided here. Contact your administrator for more information.

2. When the wizard for creating or uploading content appears, complete the process as described in “Create new content” on page 45 or “Upload content” on page 44.

   Note: The content you select in the first step is the source content that is automatically populated in the wizard’s **Use source content** field in the **Create type** pane.

3.1.7 Content relations

Relations help organize and process repository content.

3.1.7.1 Work with content relations

View a content item’s relations:

1. Point to the item and click the **Properties** button.

2. On the **Properties** page, click and click **Relations**.

   The relations are listed on the **Relations** page.

   Note: You can view the relations that are created in OpenText Content Management and transferred to OpenText Documentum Content Management (CM).

   Relations can be created between workspaces of a single repository. They cannot be created across multiple repositories.

Note: For more information on viewing and editing properties, see “View and edit content properties” on page 43.

3.2 Managing a SAP reference of a Business Object

Your content is connected to SAP on Business Object level. Here, a reference controls where the content is used in SAP .

To add a reference to a Business Object:

1. Select a business workspace.
2. In the menu of the business workspace, click **Manage Business Object**.
3. Optional If you cannot see the reference on the screen, search for the document based on the available fields.
4. Click the **Search** button in the **Reference** section. Search and add the business object.
   Metadata of the business workspace is displayed.
5. Close the window.

To replace or remove a reference to a Business Object:

1. Select a business workspace which already has a reference.
2. In the menu of the business workspace, click **Manage Business Object**.
3. To remove a reference, click the **Remove** button.
4. To replace a reference, click the **Replace** button.
   a. Optional If you cannot see the reference on the screen, search for the document based on the available fields.
   b. Search and add the business object.
      Metadata of the business workspace is displayed.
   c. Close the window.

3.3 Opening OpenText Content Management from OpenText Documentum CM

To open the OpenText Content Management interface from OpenText Documentum CM, you need to add a link within a tile. The link can be integrated into a Landing page widget or into the context menu of a business workspace.

To add a tile with a link to OpenText Content Management page on the OpenText Documentum CM Landing page:

For more information, about how to create and add widgets, see section 13.21 “Configuring an Internal Widget” in *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)*.

1. Create a new widget with the following settings:

   Name
   Your internal name.

   Label
   The label that is visible to the user.

   Application
   Your application that shows the landing page.

   Widget Type
   OpenURLWidget

   URL
   The URL of you OpenText Content Management system.

2. Add the widget to your landing page.

   For more information, see *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)* and *OpenText Documentum Content Management - Client Configuration Guide (EDCCL-AGD)*.

3. Click the link on the tile to open OpenText Content Management.

3.4 Opening Workspace View from OpenText Documentum CM

You can access the Workspace View from OpenText Documentum CM by directly switching to OpenText Content Management.

To switch to OpenText Content Management:

1. Navigate to the business workspace.
2. In the menu of the business workspace, click **Open OpenText Content Management**.
   The Workspace View of OpenText Content Management opens.

3.5 Creating business workspaces in OpenText Documentum CM

If you have documents that should be saved in a workspace in OpenText Documentum CM without yet being linked to a SAP object, you can start the business workspace creation in OpenText Documentum CM.

The business workspace is created in OpenText Content Management, using the template and all other features that are defined here. Thus, this workspace can easily be connected with SAP later. The name of the business workspace depends on the individual settings of your system. For example, Purchase order, Resume or whatever is relevant in the context of your OpenText Documentum CM folder.

To start workspace creation in OpenText Documentum CM:

1. Open the folder where you want to create the business workspace.
2. Click + > *<business workspace>*.

   The real name that displays in the menu is not *<business workspace>*, but the individual configuration for your folder and system.

   The entry opens a template for business workspace creation.
3. If the name of your workspace is automatically created, you need not fill data in the template.

   If you manually create the name, enter the name.

   Note: Further information or data is not saved for your business workspace.
4. Click **Save**.
   The business workspace is not connected to a Business Object in SAP . The SAP attributes are empty.

Chapter 4

Working in SAP

Workspace creation

You usually create workspaces when you work with your business objects in SAP. You can find the workspaces in Documentum and OpenText Content Management.

OpenText Content Management only provides a view on the items that are added to the workspace in SAP. It triggers the workspace creation in both systems and handles the SAP metadata. Documentum manages the items that are saved in the workspaces.

Your administrator configures how these workspaces are created in Documentum and Content Server:

- A batch job in SAP automatically starts workspace creation for business objects that match certain criteria. The time, when a workspace is available, depends on the setup of the so called asynchronous queue.
- A workspace is created when a new business object is created in SAP.
- You create a workspace manually in SAP.
- You create a workspace in Documentum.

Note: It is currently not possible to remove a business workspace from a business object.

4.1 Working in SAP ERP with the Business Content window

The Business Content window is your main access point to the business workspace and ArchiveLink records for a business object in SAP ERP. You open the Business Content window via the Generic object services (GOS) menu in a transaction.

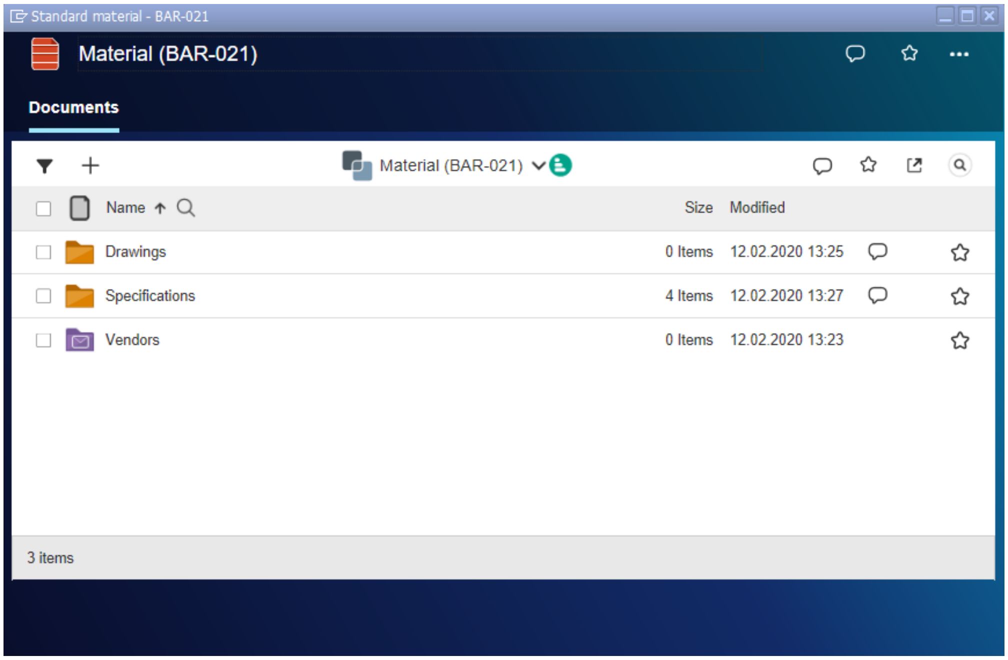


Figure 4-1: Business Content window with business workspace in Smart view

4.1.1 Accessing the Business Content window

You open the Business Content window from the GOS menu. This menu is available in SAP transactions for business objects that are configured for OpenText Content Management.

To open the Business Content window:

1. Go to the transaction of the business object.
2. Click  **Services for Objects**.
3. Select **Business Content**.

4.1.2 Adding and creating a business workspace

You can add or create any business workspace to an business object. If a business workspace is created in Documentum and you want to connect it with an object, you just search for the business workspace and add it to the business object.

The Business Content window always displays the **Business Workspace** item in its tree view, even if no business workspace has been added to the business object. You can either create a business workspace or complete an existing business workspace.

To create or complete a business workspace in the Business Content window:

1. Select the **Business Workspace** item in the treeview.

   The new business workspace is created in the connected Content Server.

   If the business object is configured accordingly, you can complete an existing business workspace or create a new one.

2. In the **Create or complete business workspace** window, do one of the following:

   - To create a new business workspace, click **Create new**. Check the properties and click **Create**.
   - To complete an existing business workspace, click it in the list. Check the properties of the business workspace and click **Complete**.

You can also create business workspaces in Documentum or OpenText Content Management. For more information, see

- "Creating business workspaces in OpenText Documentum CM" on page 50
- "Creating a business workspace manually" on page 11

4.2 Working in SAP CRM

Business workspaces and business attachments are also available in the SAP CRM WebClient UI and S/HANA for Customer Management (S/4CRM). Depending on your configuration, the OpenText Content Management functions are either visible in the SAP CRM WebClient UI as separate *assignment blocks* or in the *CRM Interaction Center* on separate tabs. For S/4CRM only assignment blocks are available.
In both user interfaces, you can perform the following functions:

- View a business workspace and display its documents
- Create a new business workspace (only available if the business object has no workspace yet)

4.2.1 Displaying a business workspace

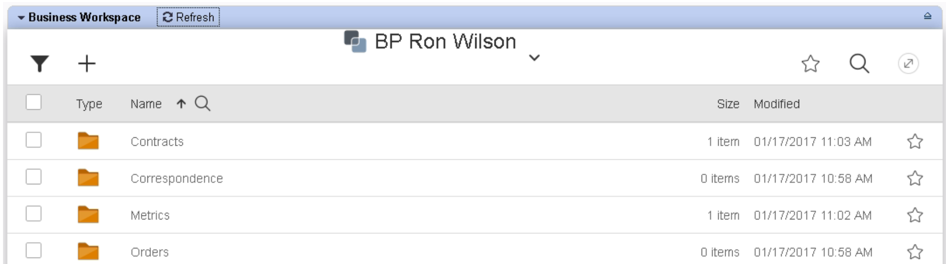
To view a business workspace in SAP CRM WebClient UI or S/4CRM:

1. Search for the required CRM object (in the following example, the required customer account) using the search function.

   The details are displayed in the **Account Details** field.

2. Expand the **Business Workspace** assignment block by clicking the expand button in the header.

   The *Smart View widget* displays the content of the business workspace. An icon indicates the type of document, for example a PDF or an image file. You can also see if the document is a shortcut or if it is reserved for editing by someone else.

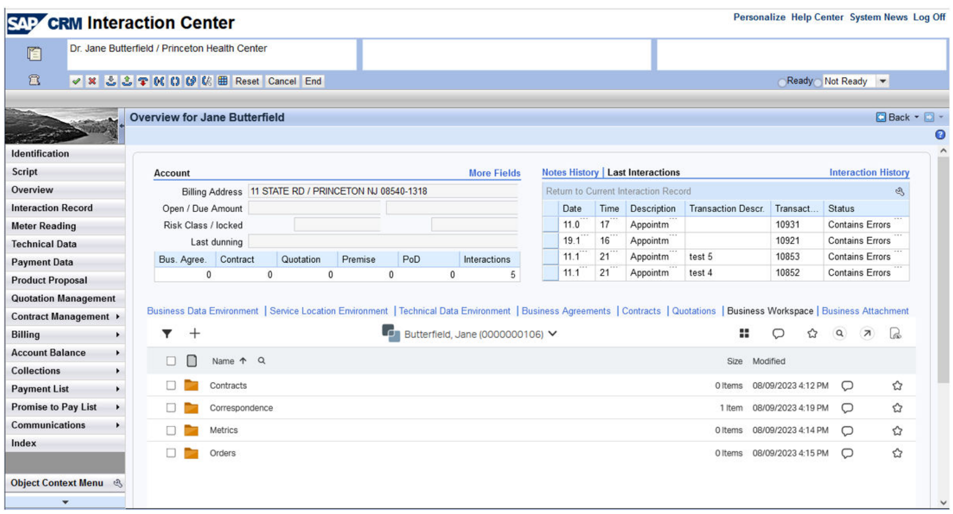


To view business workspace in CRM Interaction Center:

1. Search for the required CRM object (in the following example, the required customer account) using the SAP CRM search function.

   The details are displayed in the overview.

2. Open the **Business Workspace** tab.



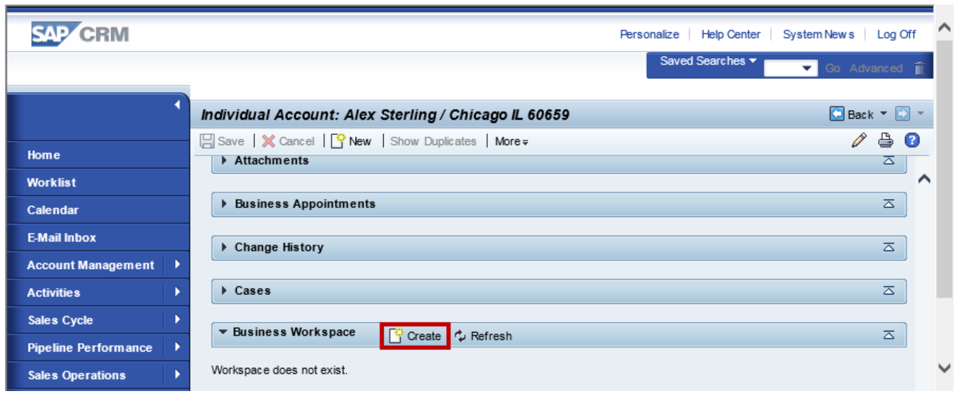
The respective business workspace is displayed.

4.2.2 Creating a business workspace

You can create a business workspace in the SAP CRM only for the CRM objects (in the following example, customer accounts) that are maintained in SAP CRM.

To create a business workspace in SAP CRM WebClient UI:

- Click **Create** in the **Business Workspace** block header.

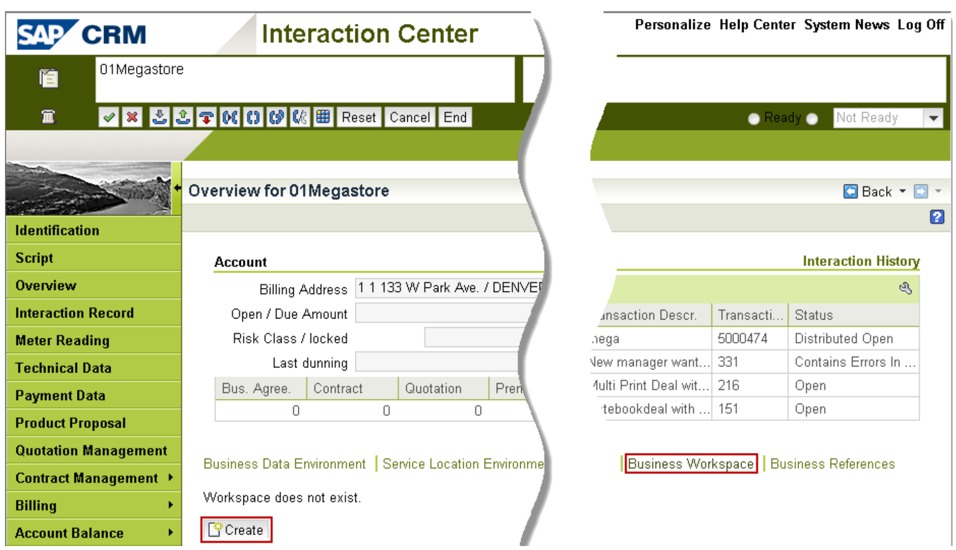


The business workspace is created in Content Server and simultaneously displayed in the **Business Workspace** block.

Note: For the workspace creation, the same settings as in the automatic creation are used. The configuration settings determine if a binder, a case, or a business workspace is created.

To create a business workspace in CRM Interaction Center:

- Click **Create** in the **Business Workspace** tab.



The business workspace is created in Content Server and simultaneously displayed in the **Business Workspace** tab.

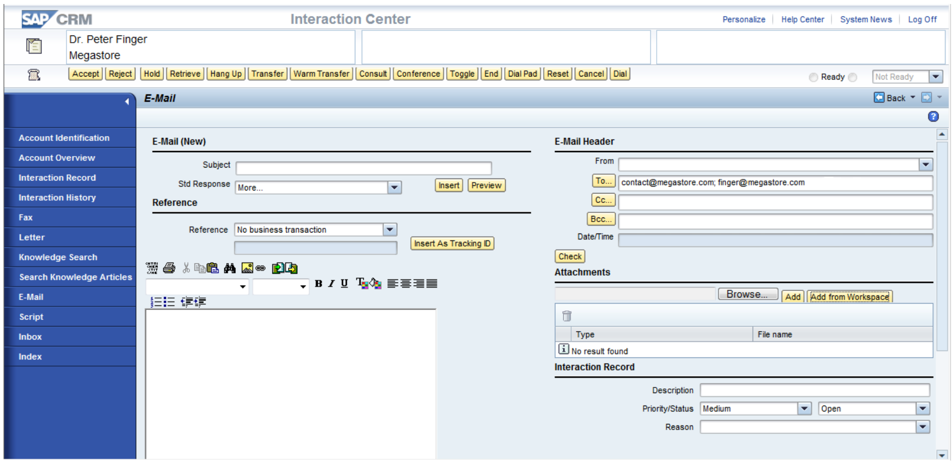
Note: For the workspace creation, the same settings as in the automatic creation are used. The settings in the configuration also determine if a binder, a case, or a business workspace is created.

4.2.3 Adding a business workspace document to an email

In both SAP CRM WebClient UI and SAP CRM Interaction Center, you can browse the business workspace and attach a document to an email.

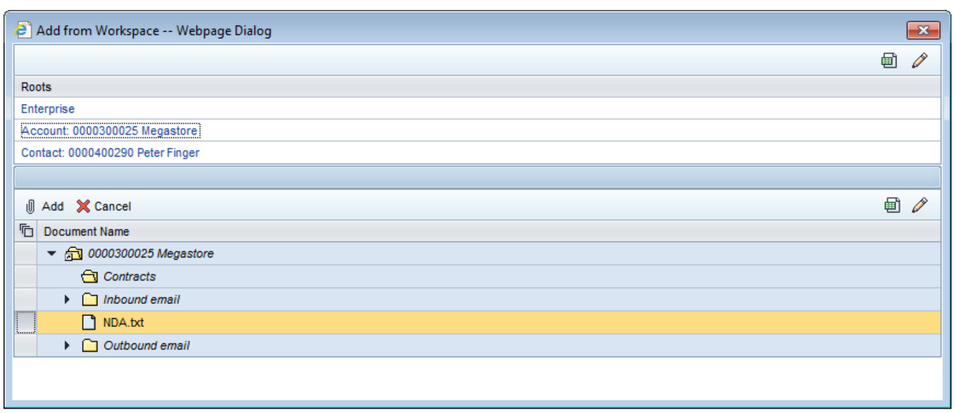
To attach a document to an email in SAP CRM Interaction Center:

1. Identify an account and confirm it.
2. Click **E-Mail** to write a new email.



3. In the **Attachments** area, click **Add from Workspace**.

   A window opens from which you can select your document:



The **Roots** section displays the business workspace(s) that are available for this account.

Note: If there is no business workspace created or if you have not confirmed an account, you will only see the link that leads you to the complete Documentum content.

4. Click a business workspace link to see its content.
5. Find the document that you want to attach and select it.

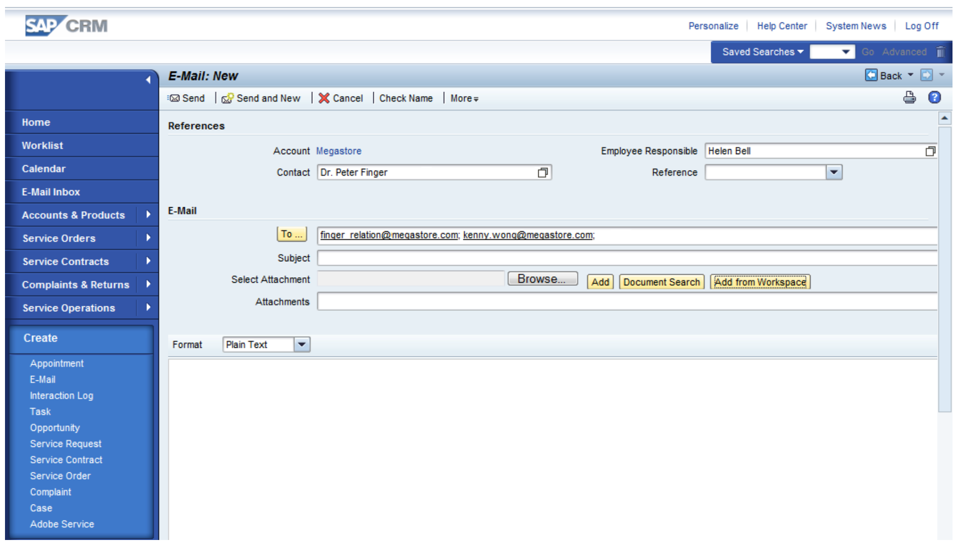
   Tip: You can select more than one document. If a document is already attached to the email, it will not be added again.

6. Click **Add**.

   The document is copied to your email as an attachment.

To attach a document to an email in SAP CRM WebClient UI:

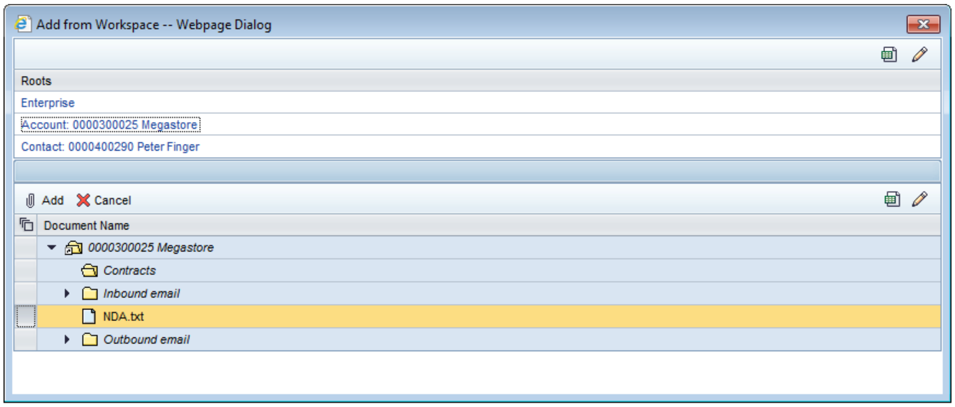
1. Click **E-Mail** to create a new email.



2. Select the account.
3. Click **Add from Workspace**.

   Tip: If you do not see the Attachments fields, select **More > Attachments** from the email menu

A window opens from which you can select your document:



The **Roots** section displays the business workspace(s) that are available for this account. An additional link provides access to the complete Documentum content for which you have sufficient permissions.

4. Click a business workspace link to see its content.

5. Find the document that you want to attach and select it.

   Tip: You can select more than one document. If a document is already attached to the email, it will not be added again.

6. Click **Add**.

   The document is copied to your email as an attachment.

4.3 Working in SAP SRM

OpenText Content Management can be integrated in the SAP SRM user interface. Thus, you can access business workspaces and business attachments from the business object. Depending on your system configuration, the functions are available as additional tabs for SAP SRM objects such as shopping carts or purchase orders.

Note: To improve your user experience with the OpenText Content Management integration, set the portal theme in SAP SRM to the **SAP Tradeshow** theme (**Personalize > Portal Theme**).
However, a different customer-specific theme may be available for your configuration. Ask your system manager for details.

You can perform the following functions:

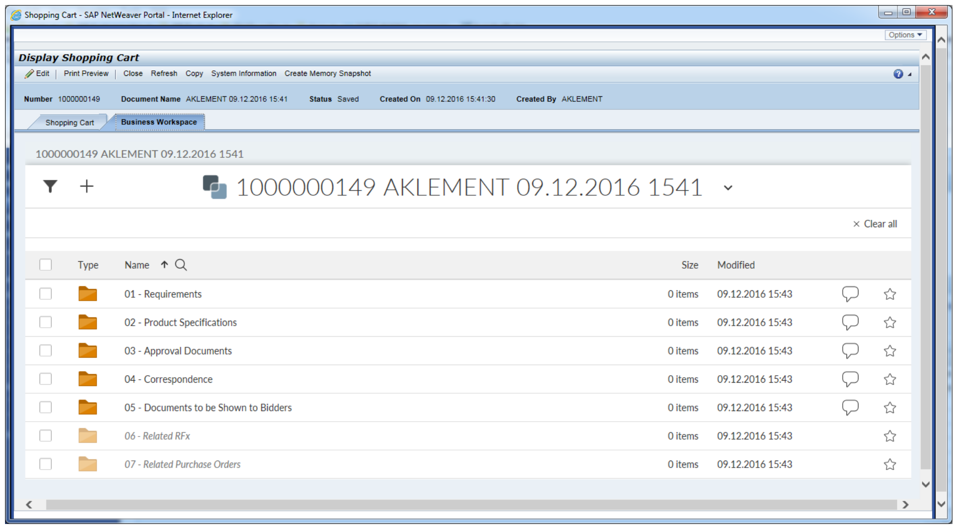
- Display the business workspace and its documents
- Create a new business workspace if the business object has no workspace yet

Typically your system is set up to automatically create business workspaces. This can be triggered, for example, when you create an SAP SRM business object such as a shopping cart, a purchase order or a purchase confirmation.

4.3.1 Displaying the business workspace

To view business workspace in SAP SRM user interface:

1. Navigate to the required SRM object (in the following example a purchase order) in the SAP SRM user interface.
2. To access the business workspace, open the **Business Workspace** tab.



Depending on the settings of the system, the business workspace may also be displayed as a*Smart View widget*. The widget shows the content of the business workspace. An icon indicates the type of document, for example a folder, a PDF or an image file. You can also see if the document is a shortcut or if it is reserved for editing by someone else.

4.3.2 Creating a business workspace

You can manually create a business workspace for an SRM business object.

To create a business workspace in SAP SRM user interface:

1. Navigate to the required SRM business object in the SAP SRM user interface.
2. Open the **Business Workspace** tab and click **Create**.

   The business workspace is created in OpenText Content Management and then displayed in the **Business Workspace** tab.

You can now work with the business workspace and its documents.