

# EMC My Documentum for Microsoft SharePoint

*A Detailed Review*

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## **Abstract**

This white paper reviews the functionality and components of My Documentum<sup>®</sup> for Microsoft SharePoint. The paper also discusses how My Documentum for SharePoint serves knowledge workers within an organization while it helps to build and maintain robust, flexible, and compliant information.

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## Executive summary

Microsoft SharePoint is everywhere—and its rate of adoption shows no signs of decline. Virtually all industry research on SharePoint notes three things: Many large organizations deploy it; they have no plans to stop; and users like it. SharePoint gets good “word-of-mouth.”

Microsoft SharePoint offers a very wide breadth of functionality that includes business intelligence, portal capabilities, forms, search, content management, and, of course, collaboration. But as organizations see a rapid growth in the number of SharePoint sites and the content those sites contain, they are faced with how to integrate SharePoint into a comprehensive enterprise content management (ECM) infrastructure.

A single enterprise may have thousands of SharePoint sites; Microsoft has over 100,000. How is all that content being managed, secured, and retained? How much valuable corporate content is stored in disconnected SharePoint “silos”? Ideally, SharePoint content should be available to be reused or repurposed via other client applications, while under the control of enterprise-wide retention, compliance, and records management policies.

Many knowledge workers use Microsoft SharePoint for team-based content development. But these same workers often need to participate in critical enterprise business processes, which are not accessible via the SharePoint interface and require learning another client. With the unrelenting need for efficiency and productivity, this additional training is something organizations would prefer to minimize if not eliminate.

Moreover, long-term storage of SharePoint content can be prohibitively expensive since everything—files and metadata—resides on SQL servers, which are typically deployed on high-end, rapid access machines. For a global organization, across a time frame of years, that is a very costly proposition. There are better, cheaper ways to handle large volumes of content as they age and are needed less and less frequently.

## Introduction

All of these Microsoft SharePoint “caveats” reveal a common situation for many large organizations—including a large number of EMC<sup>®</sup> Documentum<sup>®</sup> customers. Most have already invested significantly in their information infrastructures in terms of content management, archiving, and compliance. These infrastructures now include SharePoint. So how does an enterprise leverage the value of SharePoint, increase IT efficiency, and address the broad concerns of information governance, risk mitigation, and compliance?

Documentum customers have been very clear about how: make Microsoft SharePoint and Documentum “work together.” Most often, two use cases for this desired cooperation emerge. One is the ability to take SharePoint content and place it in Documentum, using Documentum as the repository of record. For that, EMC has developed EMC Documentum Repository Services for Microsoft SharePoint, which is described in another [white paper](#).

The second is as a SharePoint “window” into a Documentum repository, leveraging SharePoint as a Documentum client and providing users with some of the essential content services available within Documentum. EMC My Documentum for Microsoft SharePoint addresses the second use case.

My Documentum for Microsoft SharePoint is a set of Web Parts that are added to SharePoint sites and connect directly to Documentum Content Server. The Web Parts emulate the SharePoint user experience within the Documentum environment.

EMC built My Documentum for Microsoft SharePoint by taking advantage of next-generation Documentum platform architecture features such as Unified Content Facilities (UCF) and Documentum Foundation Services (DFS). The remainder of this white paper provides an overview of My Documentum for Microsoft SharePoint and its primary functional components.

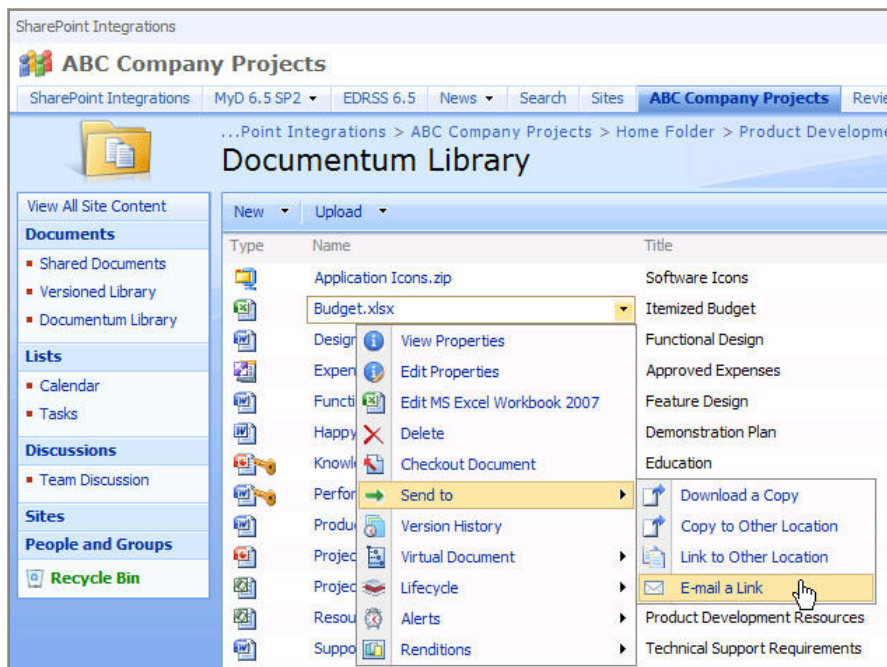
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## Audience

This white paper is an overview of My Documentum for Microsoft SharePoint and its functional capabilities. It is intended for CIOs, developers, IT administrators, and line-of-business managers who want to provide SharePoint users with access to content that resides in Documentum and to the basic content services available through the Documentum platform.

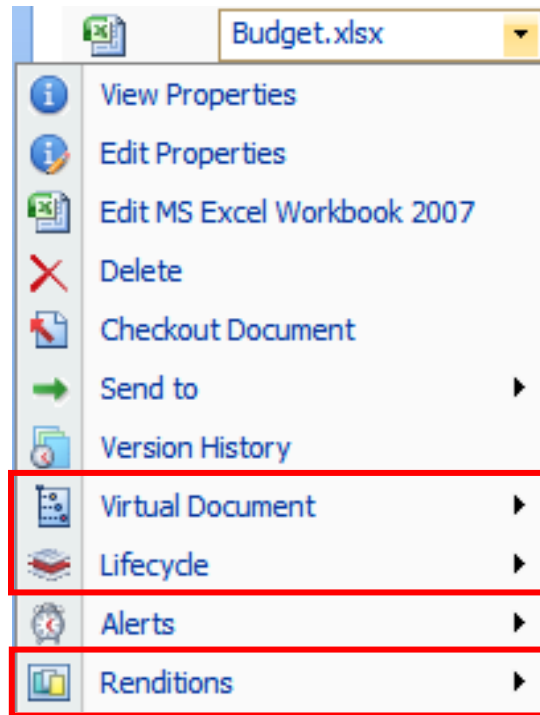
## The My Documentum for Microsoft SharePoint interface

The My Documentum for SharePoint interface *was not* created for Documentum users. It was created for SharePoint users. The user interface faithfully re-creates the SharePoint user experience. Deviations from native SharePoint are the result of added Documentum functionality not available in SharePoint. These additions were designed to appear as natural extensions of the SharePoint interface, not as they would be if implemented in other Documentum clients.



**Figure 1. Users experience the familiar Microsoft SharePoint interface**

The content displayed within My Documentum for SharePoint is in Documentum Content Server and not in SQL Server. SharePoint is unaware the content exists; users are interacting directly with Documentum using My Documentum for SharePoint as a client. The View Properties, Edit Properties, and Edit Word Documents, and other options are all options that users would see if they were in native SharePoint. Nevertheless, the pull-down menu has three options that are uniquely Documentum: Virtual Documents, Lifecycles, and Renditions, which are displayed in Figure 2.



**Figure 2. EMC has added three Documentum options to the standard SharePoint pull-down menu**

These options can be turned on or off depending on the needs of the user population. For example, SharePoint does not support renditions. If Documentum Document Transformation Services is deployed and properly configured, a user who needs a PDF rendition of an InfoPath document could have it created automatically via Documentum.

## **My Documentum for Microsoft SharePoint Web Parts**

EMC My Documentum for Microsoft SharePoint offers SharePoint users the ability to interact with content stored and managed in Documentum through highly configurable Web Parts. It seamlessly integrates Microsoft technologies with Documentum content repositories, which in Microsoft terminology are called libraries.

The current version of My Documentum for SharePoint (6.5 SP2) has two Web Parts: Documentum Library and Documentum Search. Installed and configured by SharePoint administrators, Web Parts are added to a SharePoint site as needed. Administrators can also authorize users to create site-specific configurations for their sites. Common properties that can be configured and shared across all Web Parts include Appearance, Layout, and Advanced Characteristics.

Documentum Web Parts behave in the same manner as any out-of-the box SharePoint Web Part—for users and administrators. Administrators install, deploy, and configure Documentum Web Parts just as they would a SharePoint Web Part. For instance, Documentum Web Parts are installed in the standard SharePoint dashboard view. The Web Parts are described more fully in the next sections.

### ***The Documentum Library Web Part***

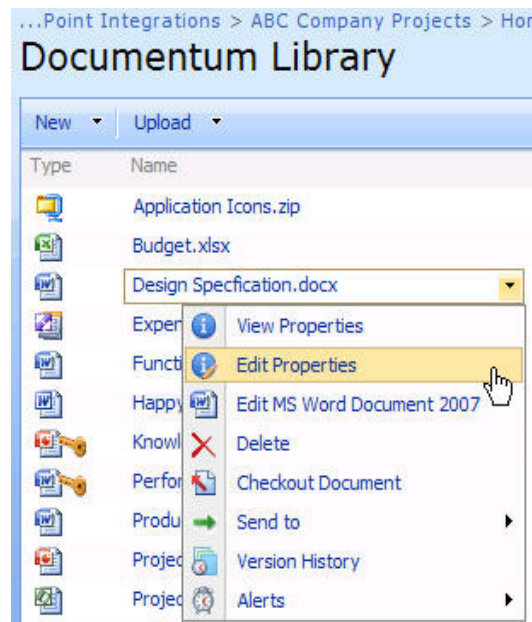
In My Documentum for Microsoft SharePoint, Documentum repositories are referred to as libraries. The library Web Part enables end users to navigate a Documentum repository and perform basic content

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services such as check-in and check-out, create a document, import content, and so forth. Site administrators can also enable three Documentum extensions: lifecycles, renditions, and virtual documents.

Just as in SharePoint, possible user actions within a library are accessed from a list box to the right of the filename when the cursor is positioned over a cabinet, document, or folder. For example user actions for a cabinet or folder are:

- View Properties
- Edit Properties
- Delete



**Figure 3. Displaying user actions**

## Access to content

Access to Documentum content via Microsoft SharePoint requires two user accounts: one for SharePoint and one for Documentum. SharePoint credentials continue to govern access to any SharePoint site. Documentum credentials are the standard user and group (not role-based) credentials applied across the Documentum environment. Documentum credentials have no bearing on site access, but they do determine what content is displayed to a user.

There are two single sign-on (SSO) methods used with this product. Seamless SSO works in environments that use Active Directory to generate users for SharePoint and Documentum. Seamless SSO utilizes Kerberos to enable the product to understand a user's Documentum identity when accessing a site, eliminating the need to log in to Documentum for access to the Web Part. For environments that do not use Active Directory to create Documentum users, session-based SSO requires users to log in to Documentum once per session.

## Documentum Login

Please login to access your Documentum libraries.

\* indicates a required field

<b>Library</b> Select a Documentum library.	TestSPRepo1 ▼
<b>Username *</b>	<input type="text"/>
<b>Password *</b> You can verify credentials using the test button.	<input type="password"/> <input type="button" value="Test"/>
<b>Domain</b>	<input type="text"/>
<b>Save My Credentials</b>	<input type="checkbox"/> Save my credentials for all libraries.

Figure 4. The Documentum Login screen

### Virtual documents

Virtual document technology is a core feature of the Documentum ECM platform. A virtual document is a file that contains one or more files nested inside it. A virtual document is the “parent” and the files within it are its “children.” For example, a virtual document could be a book and the files within it the book’s chapters. Each chapter would be a separate file inside the parent document. The files nested in a virtual document can also be virtual documents, which means nesting can occur on multiple levels. When a virtual document is checked out of a library, only the parent is checked out.

A virtual document can include children of different file formats. For example, a Microsoft Word file could be the parent and its children could include an Excel spreadsheet and a TIFF image. Virtual document children can be added, removed, and rearranged. A simple document can be converted to a virtual document and vice versa. Figure 5 shows the menu option for converting a standard document to a virtual document.

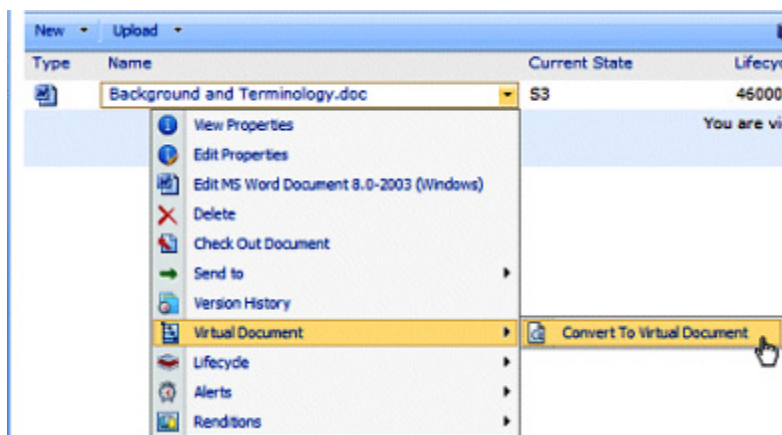


Figure 5. Creating a virtual document

## Renditions

A rendition is a document copy created in a different format from the original. When the renditions extension is turned on, My Documentum for SharePoint users can view the renditions of a document, determine the format of the original document, create a rendition in either PDF or HTML, and delete a rendition. Documentum Transformation Services (DTS) is required to support this feature.

When a file is versioned, its renditions are not automatically carried forward with the new version of the file. Renditions remain with the file version from which they were created. If used in conjunction with Documentum Business Objects Framework (BOF), renditions can be configured to automatically create a rendition when a document is checked into the library.

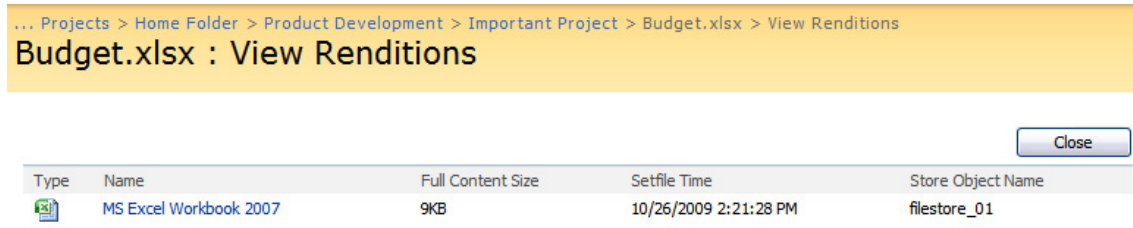


Figure 6. A Word document and its two renditions

## Lifecycles

A lifecycle defines a sequence of states that a document passes through from creation and review to approval and retirement or disposition. For example, an employee creates a new human resources form, another employee reviews it, and a third approves the document for distribution to all employees. A retention policy could define the shelf life of the form and when it should be retired. The lifecycle identifies the document's state at each point in the process.

For example, the Exception\_Lifecycle supports suspending a document in any lifecycle state, which halts the document's progress until the lifecycle is resumed. When a lifecycle is suspended it is in an exception state.

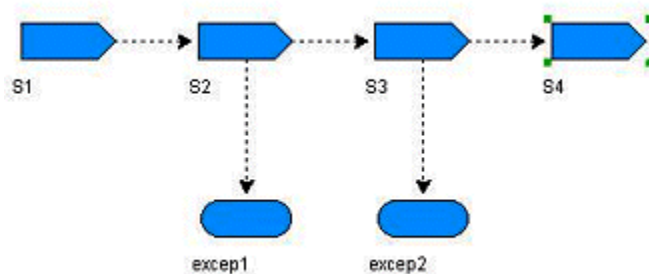


Figure 7. The Exception\_Lifecycle can be suspended

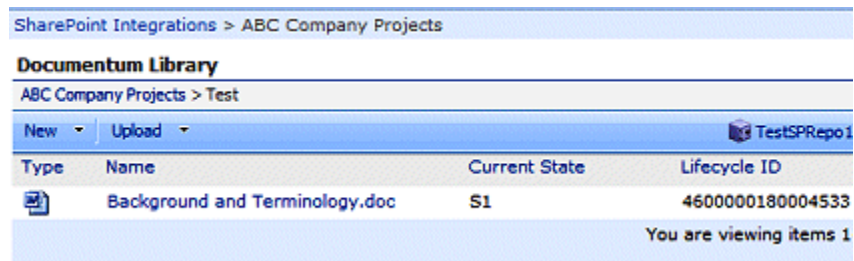
If a document does not have a lifecycle applied, its **Current State** and **Lifecycle ID** will display no values.




Figure 8. This document has no applied lifecycle

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Once a lifecycle is applied to a document, users can remove the lifecycle, promote the document to the next stage, and demote the document if it is past its initial state—S1.



The screenshot shows a web interface for a Documentum Library. At the top, it displays the breadcrumb 'SharePoint Integrations > ABC Company Projects'. Below this, the title 'Documentum Library' is shown, followed by another breadcrumb 'ABC Company Projects > Test'. There are 'New' and 'Upload' buttons. A table lists the contents of the library. The table has four columns: 'Type', 'Name', 'Current State', and 'Lifecycle ID'. One document is listed: 'Background and Terminology.doc' with a 'Current State' of 'S1' and a 'Lifecycle ID' of '4600000180004533'. At the bottom right of the table area, it says 'You are viewing items 1'.

Type	Name	Current State	Lifecycle ID
	Background and Terminology.doc	S1	4600000180004533

**Figure 9. A document in the S1 lifecycle state**

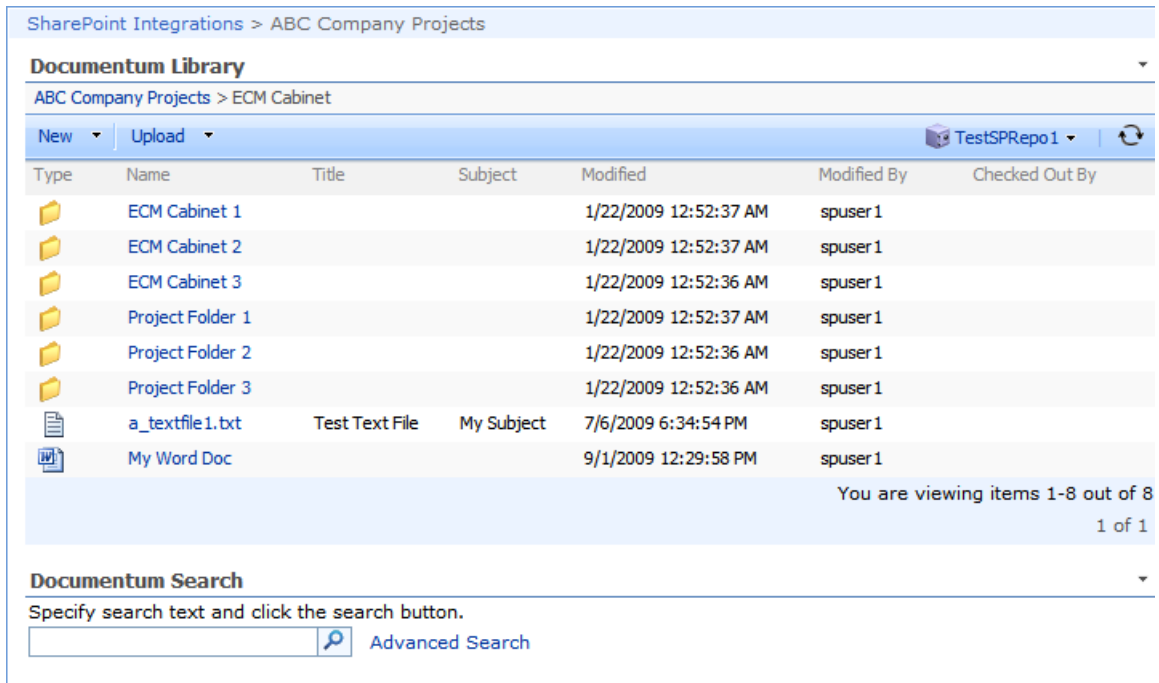
## ***The Documentum Search Web Part***

The Documentum Search Web Part, which uses standard Documentum platform APIs, enables end users to search for content that resides within a Documentum Library. It does not search SharePoint content.

User search via metadata unless the Documentum Index Server is deployed. Then full-text searches can be performed on any cabinet, folder, or document that can be indexed. Pictures and binary content, which are not full-text searchable, can be found via relevant metadata.

### **Simple search**

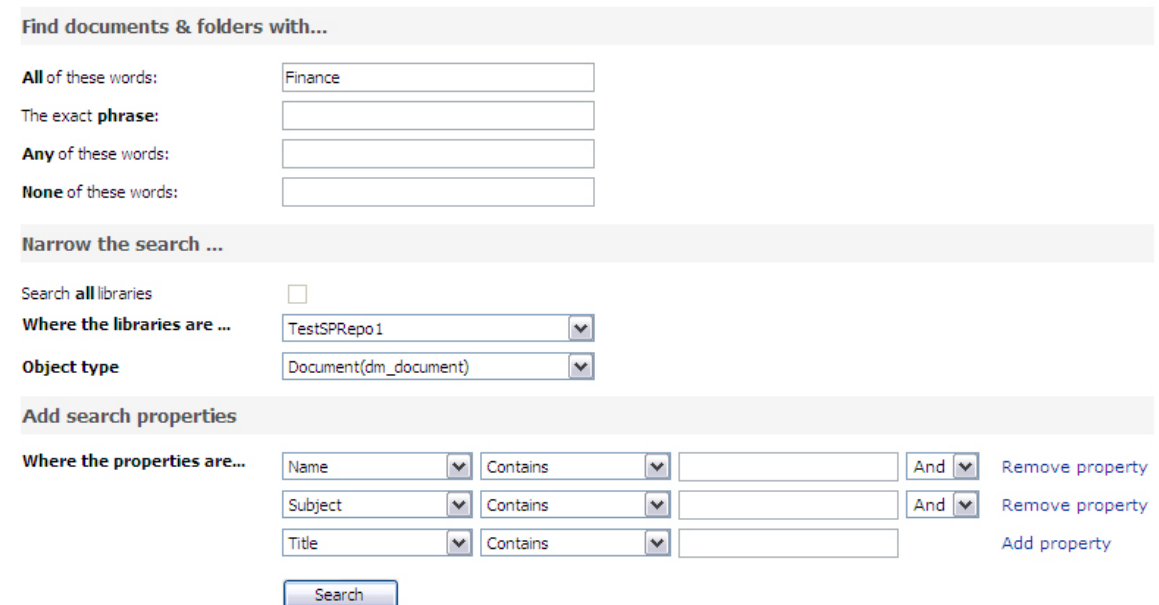
In a simple search, which can be a metadata or a “full-text” search, a search term (a word or phrase) returns documents and objects that contain the term or whose properties contain it. A search can be limited to a single library or it can span multiple libraries, depending on how the Web Part is configured. When displaying results, My Documentum for SharePoint displays files with the most matches first. If a library has been indexed for parts of speech, the search results will include files with variations of the words in the search term. For example, a search for *scanning* will return files that contain *scan*, *scanned*, and *scanner*.



**Figure 10. The simple search screen**

## Advanced search

To search for a document by one of its properties, advanced search is more effective. An advanced search enables the user to define a precise query based on the properties of the document. For example, an advanced query might search for the current version of documents whose name begins with Documentum and whose author is John Smith. Figure 11 shows a portion of the advanced search screen.



**Figure 11. Advanced search can be narrowed by an object's properties**

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## **Configuration**

Only SharePoint site administrators can add My Documentum for SharePoint Web Parts to a SharePoint site. Web Parts added to a site inherit common property settings (Appearance, Layout, and Advanced properties) at the site collection level and impose the same view against all end users accessing the site. Common property settings inherited by Web Parts on all sites are configured from My Documentum for SharePoint. Documentum Foundation Services (DFS) must be configured for My Documentum for Microsoft SharePoint to connect to Documentum Content Server and for each Web Part to be correctly configured.

## **Conclusion**

My Documentum for Microsoft SharePoint enables knowledge workers to participate in enterprise-wide business processes and gain access to content stored in Documentum, without leaving the comfort and familiarity of the SharePoint interface. Documents such as contracts, new drug applications, standard operating procedures, and other business-critical content can be stored and managed in Documentum while SharePoint provides the means for universal access and collaborative exchange. Users also gain the control provided by Documentum content services. They can:

- Check objects in/out of Documentum
- Change object properties and metadata
- Change a document's lifecycle status
- Employ virtual document capabilities
- View document renditions
- Perform simple and advanced searches across multiple Documentum libraries

For IT administrators and the organizations they serve, My Documentum for SharePoint extends the value of SharePoint deployments while it contributes to a unified infrastructure that facilitates robust information governance and regulatory compliance. The Documentum platform acts as centralized point of control for SharePoint applications and content. To learn more about EMC solutions for Microsoft SharePoint integration, please visit [EMC.com](http://EMC.com) or call 800.607.9546 (outside the U.S.: +1.925.600.5802).