

OpenText Core Content

User Quick Start Guide

Welcome to OpenText Core Content, a SaaS content services platform with industry-leading content management capabilities purpose-built to maximize employee productivity by aligning content to business needs.

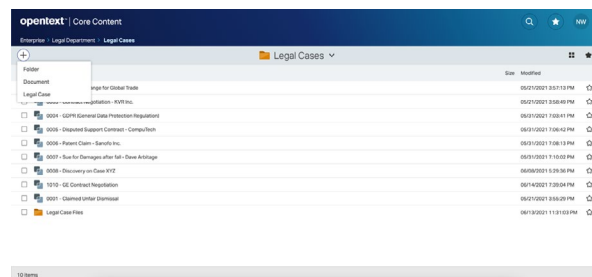
This quick start guide overviews:

- Basic operations
- Document approval workflows
- Workspaces and participants

1 Basic Operations

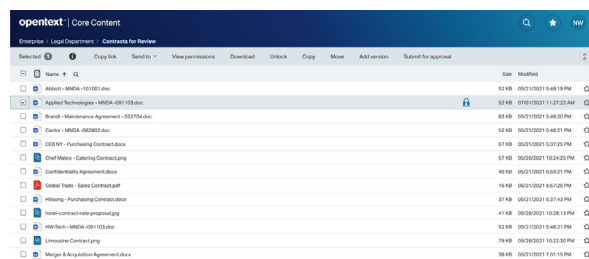
Add Items

- Add Documents, Folders, and Workspaces by clicking the **Add item icon** . You can also drag and drop items from your computer. The types of items you can add depend on the system configuration and your permissions.
- If an item in the current folder has the same file name and file type as an item you are adding, you can rename the item to resolve the conflict.
- If you try to add an item that has a size of 0 bytes, the upload will fail.



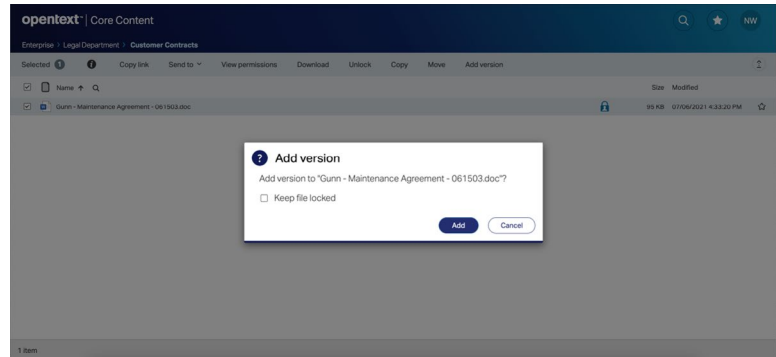
Lock and Unlock Items

- Locking an item reserves it so other users cannot make changes to it.
- To lock an item, click **Lock** on the **Inline Action Bar**. To unlock the item, click the **Locked** icon. You can also unlock the item by adding a new version of the item.
-  Item is locked by you. Point to the icon to see when you locked the item.
-  Item is locked by another user. Point to the icon to see the user who locked the item and the date when the user locked the item.



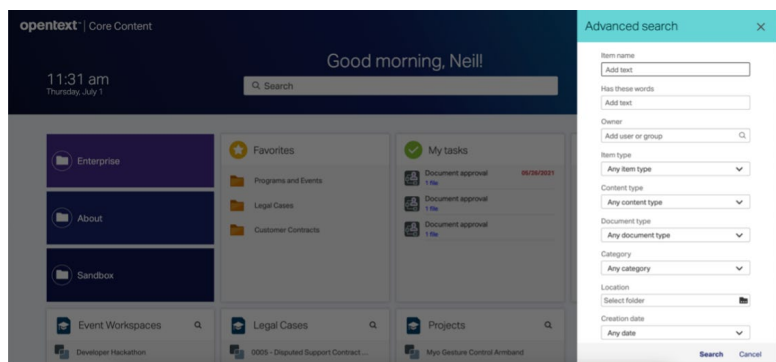
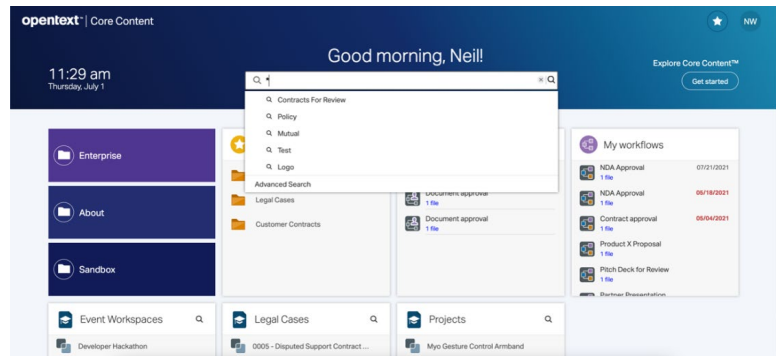
Add Versions

- You must lock the item before you can add a new version. Versions can be viewed on the **Properties** page.
- Point to the locked item you want to add a version to, click **Add version** on the **Inline Action Bar**.
- Navigate to the new version of the item and select it.
- **OPTIONAL** In the **Add version** dialog box, select the **Keep file locked** check box to add a new version and keep the new version of the item reserved.
- Click **Add**.

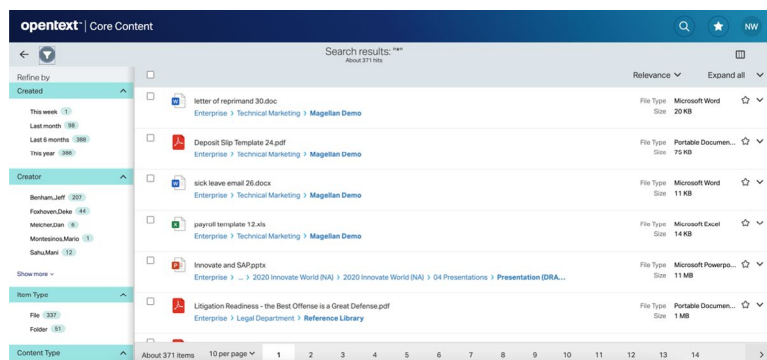


Search and Filter

- Perform a basic search from anywhere you see the **Search** icon. A basic search looks for the item in the location where you initiated the search, for example, in your **Favorites** or **My workspaces** tile.
- Perform an advanced search of all locations in Core Content by clicking in the **Search** box and selecting **Advanced search**. In the **Advanced search** panel, set one or more search filters (i.e. item name, owner, content type, etc.) to find the item, then click **Search**.



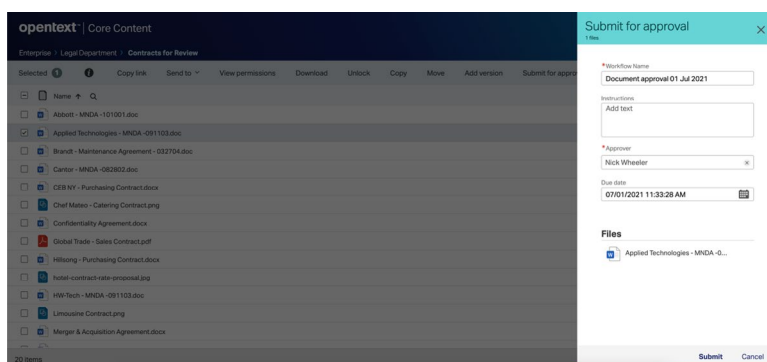
Tip: Click in the **Search** field to see a list of recent search items. Select a recent search to search for an item again.



2 Document Approval Workflow

Submit a Document for Approval

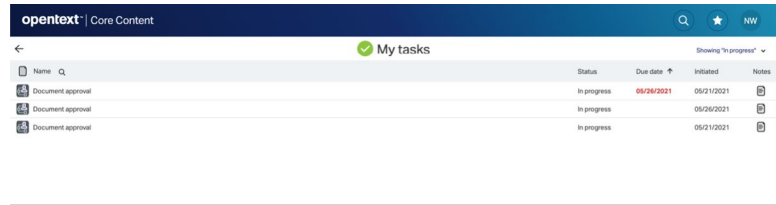
- In a folder, select the check box beside one or more documents you want to submit for approval, then click **Submit for approval**. If the **Submit for approval** button does not display, then the selected item belongs to a document type that does not support the document approval workflow.
- In the **Submit for approval** panel, edit the name of the workflow, if required.
- **OPTIONAL** In the **Instructions** box, type additional information for the approver.
- In the **Approver** box, type the first few letters of the approver's name and then select the approver.
- In the **Due date** box, click the **Date picker** icon  and select a date. Click the **Select Time** icon  and set a specific time when the review is due on the due date.
- Review the files attached to the document approval workflow. To remove the file from the workflow, point to a file and click the **Remove** icon .
- Click **Submit**.



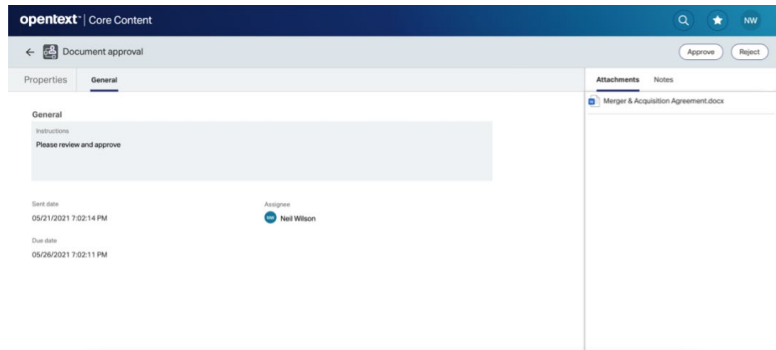
Document approval tasks assigned to you are displayed on the **My tasks** tile on your Home page. After you review the document, you can add notes to the document approval workflow, or simply accept or reject the workflow task.

Tip: You can approve and reject document approval workflows from the **Inline Action Bar** on the **My tasks** page.

- On your **My tasks** tile, click a task.
- On the **General** tab of the Document approval page, review information about the workflow assignment, including the date the workflow was initiated, the due date, and the assignee.
- On the **Attachments** tab, click the name of the file to open the document.
- On the **Notes** tab, you can:
 - View existing comments about the document.
 - Click the **Add note** icon  to enter your comments.
- Click **Approve** or **Reject**.
- Type comments for the user who initiated the approval workflow and **Submit**.



Name	Status	Due date	Initiated	Notes
Document approval	In progress	06/26/2021	06/21/2021	
Document approval	In progress	06/26/2021	06/26/2021	
Document approval	In progress	06/26/2021	06/21/2021	



Document approval

Approve
Reject

Properties
General

General

Instructions
Please review and approve

Sent date
05/21/2021 7:02:14 PM

Due date
06/26/2021 7:02:11 PM

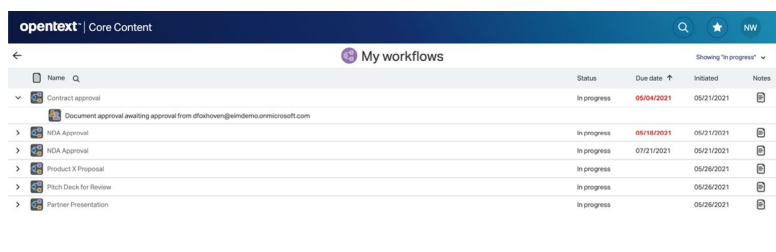
Assignee
Neil Wilson

Attachments
Notes

Merger & Acquisition Agreement.docx

Manage Document Approval Workflows

- Submitted document approval **workflows** are displayed on the **My workflows** tile on your Home page. In the expanded view, you can see the status of your workflow, the due date, the date you initiated the workflow, and you can view and add notes to the workflow.



Name	Status	Due date	Initiated	Notes
Contract approval	In progress	06/04/2021	06/21/2021	
Document approval awaiting approval from dfishowen@windemo.ams.microsoft.com	In progress	06/04/2021	06/21/2021	
NDA Approval	In progress	06/26/2021	06/21/2021	
Product X Proposal	In progress	07/12/2021	06/21/2021	
Pitch Deck for Review	In progress	06/26/2021	06/26/2021	
Partner Presentation	In progress	06/26/2021	06/26/2021	

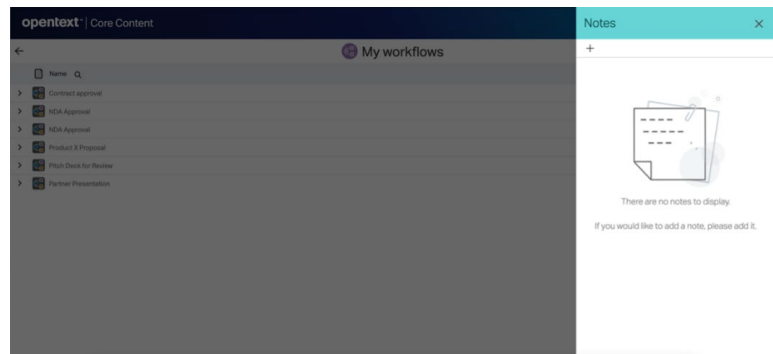
• View or add notes:

- Click the **Notes** icon  on the **Inline Action Bar** to view notes added during the document approval workflow.
- On the **Notes** tab, click the **Add note** icon  to enter a comment.

• Suspend a workflow: Click the **Suspend** icon on the **Inline Action Bar** to temporarily stop a document approval workflow.

• Resume a workflow: Click the **Resume** icon on the **Inline Action Bar** to restart a suspended document approval workflow.

• Delete a workflow: Click the **Delete** icon on the **Inline Action Bar** to stop and remove the document approval workflow. When you delete a workflow, you cannot restore it.



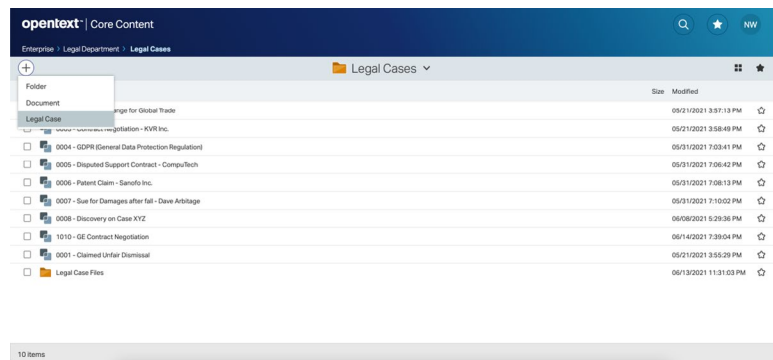
3 Workspaces & Participants

A workspace is a pre-built template which provides a simple, yet powerful way for teams to manage content-centric work. A **business workspace** is linked to an instance of a business object in a leading business application (for example, Salesforce or SAP) and is used to store content, data and people related to that object.

In most cases, the mapping between a **business workspace** and a business object is automatically created. However, if a mapping does not exist between a workspace type and a business object, you can manually create workspaces. Your administrator controls where you can create workspaces. The **My workspaces** tile lists workspaces that you have access to.

Create a Workspace

- Click the **Add item** icon , and select the workspace type that you want to create.



Participants

Participants are users who collaborate in a workspace. A participant can be assigned one or more **roles** which will define their permissions, such as 'edit and add documents' or 'read-only'. If you remove all roles from a participant, they are no longer able to contribute to the workspace.

The **Participants** tab  displays all users who collaborate in this workspace.

