

Content Manager

Software Version 10.1

Release Notes



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Software Release Date: October 2024

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Documentation updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

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- View software vulnerability alerts
- Enter into discussions with other software customers
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Many areas of the portal require you to sign in with a Software Passport. If you need a Passport, you can create one when prompted to sign in. To learn about the different access levels the portal uses, see the [Access Levels descriptions](#).

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Micro Focus Content Manager Release Notes

Introduction to Content Manager 10.1

Micro Focus Content Manager is a governance-based enterprise content management system designed to help government agencies, regulated industries, and global organizations manage their business content from creation to disposal.

With tight desktop integration and the ability to scale across large, distributed environments, Content Manager lets organizations capture, classify, manage, access, and secure enterprise information, from electronic to physical records, including Microsoft 365. Regardless of content creation and collaboration, Content Manager abilities let organizations leverage accurate, contextual, and complete information throughout its lifecycle. Managing content this way helps significantly improve serviceability, business decisions, and insight for future strategy.

Content Manager provides document and records management, e-mail management, web content management, imaging, workflow, and document-centric collaboration to organizations worldwide. Developed with more than three decades of information management expertise into comprehensive, "out-of-the-box" software and a cornerstone of the Micro Focus Secure Content Management Suite, Content Manager enables organizations to lower operating costs, secure information, enhance compliance, and increase productivity.

By focusing on Web Client capabilities; SharePoint, OneDrive, Office features; life cycle management, and SDK improvements, Content Manager 10.1 addresses the areas of cost, compliance, productivity, information privacy, and security.

Content Manager 10.1 is designed to support the International Standard of Records Management (ISO 15489:2001), and elements of ISO16175: Principles and Functional Requirements for Records in Electronic Office Environments.

Overview of Content Manager

This is the sixth patch release of the Content Manager 10.1 program series. This release includes all fixes and enhancements that were shipped in the previous releases of Content Manager. For details of the previous releases, please refer to the relevant release notes.

This release includes support for English (International), English (US), French, Spanish, and Dutch.

For technical details, including the support matrix, refer to **CM10.1_Spec.pdf** and **CM10.1_Install.pdf**.

The authoritative list of fixed change requests included in this release can be found on

https://kmviewer.saas.microfocus.com/#!/PH_217829

IMPORTANT:

The configuration information for **OpenID connect authentication**, **Zero footprint Office integration**, **MS Teams integration**, and **Mobile App setup**, in the SDK help

(https://content-manager-sdk.github.io/Community/101/release_notes.html) has been made available in the PDF documentation. Further updates to the configuration information, if any, will be available as part of the below mentioned PDF documents. Customers who have developed SDK applications or add-ins should refer to the following documents:

- CM10.1_OpenIDAuthentication.pdf
- CM10.1_Zerofootprint_Integration.pdf
- CM10.1_MSTeams_Integration.pdf
- CM10.1_MobileApp_Setup.pdf

The list of defects and enhancements included in this release can be found on the [Micro Focus Support Portal Knowledge Base](#).

To access the included items, on [the Support Portal Knowledge Base](#) page:

- Select **Content Manager (Records Manager/TRIM)** as the **Product** filter
- To display the list of included Defects, select **Known Problems** as the **Document Type** filter.
- To display the list of included enhancements, select **Enhancement Requests** as the **Document Type** filter.
- Type **10.1** into the **Search Terms** field and then click **Search**.

NOTE: A single **Document Type** filter can only be applied at a time, please ensure to clear the **Document Type** filter before selecting another filter type.

Additional Content for the 10.1 Patch Releases

Patch 1

The following details have been added to the 10.1 Patch 1 version of this document:

- [Global Temporary Table](#)

Patch 5

The following details have been added to the 10.1 Patch 5 version of this document:

- [Content Manager Document Icons , on page 9](#)

New Install and Upgrade Considerations

OpenID Connect authentication - Content Manager redirect URI

Earlier, Content Manager used **urn:ietf:wg:oauth:2.0:oob** as the redirect URI for OpenID Connect authentication. This redirect URI is deprecated by some of the OIDC providers. So, the redirect URI for OpenID Connect authentication has been changed from **urn:ietf:wg:oauth:2.0:oob** to **https://127.0.0.1**.

Content Manager stored procedures

You must install the following stored procedures as part of the patch upgrade process:

Order of stored procedure to be installed:

1. tsAclOthersCheck
2. tsAclRTAndFPCheck
3. tsAclRecordCheck
4. tsAclWorkflowCheck
5. tsAclCheck
6. tsAclStoreCheck

To manually install the stored procedure, perform the following steps:

1. In the Content Manager Enterprise Studio, right-click on the dataset where you want to install the stored procedure.
2. Navigate to **Schema > Manage**. The Schema Manager dialog is displayed.
3. In the left pane, expand **Procedures** and scroll down.
4. Select the **tsAclOthersCheck** stored procedures, right-click > **Check** and then **Recreate**.
5. Repeat step 4 for all the stored procedures mentioned above.
6. Once all the stored procedures are recreated, click **Close** to exit out of Schema Manager.

Limit for temporary database size in SQL

As part of architectural modifications, the Content Manager Workgroup Server uses temporary tables to store data in SQL Server. It is recommended to increase the TempDB size in accordance with the Content Manager usage and user concurrency, if you have set a limit for the TempDB max size.

Support for Visual Studio Tools for Office (VSTO) add-in

Microsoft has announced a change to Outlook for Windows that VSTO add-ins will no longer be supported in Outlook. If you are using New Outlook view and want to continue using Content Manager VSTO add-in, then you have to disable or untoggle the New Outlook view.

SQL Text Indexing

In 10.1, the Content Manager text indexing engine that has been in place for many years has been fully replaced with the Structured Query Language (SQL) text indexing capabilities built in to modern relational databases. This capability was first introduced in Content Manager 10.0 as an alternative. From 10.1 onwards SQL text indexing is the only way to index metadata such as titles and notes. As a result, when upgrading from a version of Content Manager that is earlier to version 10.0, you will need to factor a complete text reindex into your upgrade plan, or consider a staged upgrade, going from your current version to 10.0, enabling and indexing the SQL Text Index at this stage, then upgrading to 10.1. It is recommended that any organization that is running 10.0 should convert to SQL Text Indexing as soon as it is practical. Text search methods such as Title, Notes and Any Word searches will not be available in 10.1 until the SQL Text Index is created and indexed. See *Content Manager Enterprise Studio Help > Dataset setup and maintenance > SQL Text Index* for details on creating and reindexing the SQL Text Index.

Text search methods such as Title, Notes and Any Word searches will not be available in 10.1 until the SQL Text Index is created and indexed.

See *Content Manager Enterprise Studio Help > Dataset setup and maintenance > SQL Text Index* for details on creating and reindexing the SQL Text Index.

Oracle RDBMS Permission

For organizations running Oracle RDBMS servers it is recommended that the role assigned to the schema used needs to be updated to include the **Create Job** permission.

Behavioral change

Content Manager Document Icons

From Content Manager 10.0 Patch 4 onwards, Content Manager Desktop Client uses authoring application icons associated with a file type, if available. Otherwise, the Content Manager default document icons are used.

New Features

Platform Continuance

Content Manager 10.1 introduces support for:

- IDOL, KeyView and Media Server 12.10

Operating Systems

- Windows 11 (64-bit)
- Windows Server 2022 (64-bit)

Compliance

- Public Record Office Victoria (PROV) Version 3 VERS Encapsulated Objects (VEOs) compliance

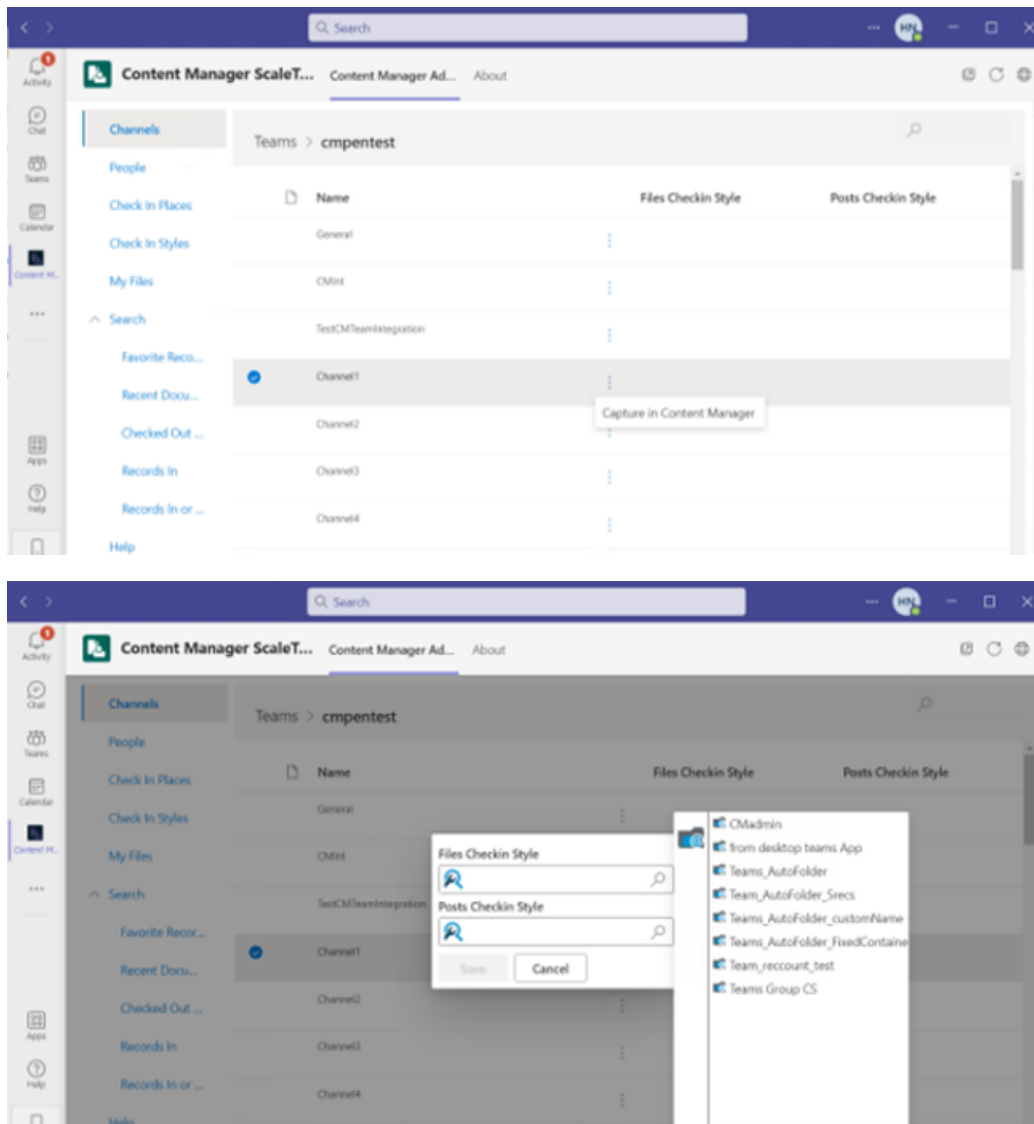
Content Manager Microsoft Teams Integration

Theme: Total Cost of Ownership

An important feature in this release is the introduction of the Content Manager Microsoft (MS) Teams integration. This new integration enables Content Manager to support the archiving of MS Teams data as records. MS Teams is a collaboration tool that is being increasingly used by organizations for day-to-day business transactions and being able to capture and manage these transactions provides organizations with information governance capabilities that have not been previously available as a seamless integration. This integration provides functionality to allow organizations to automatically capture conversations, files and post from MS Teams Channels and chats, as well as providing the option for users to make the record creation decision. Content Manager functionality allowing users to search for records and view record properties is also exposed within the MS Teams interface. Content Manager records can also be added to Teams Channels, providing easier access to records within the MS Teams application.

An administrator can configure MS Teams Channels for automated capture of the data as records in Content Manager using the **Channels** group in the Content Manager app. This configuration interface supports a quick setup of multiple channels for monitoring, which can save administrators time when configuring the integration for organizations with large numbers of channels. The administrator can select multiple channels that have the same record creation requirements and apply the Check In Style to be used in a single update.

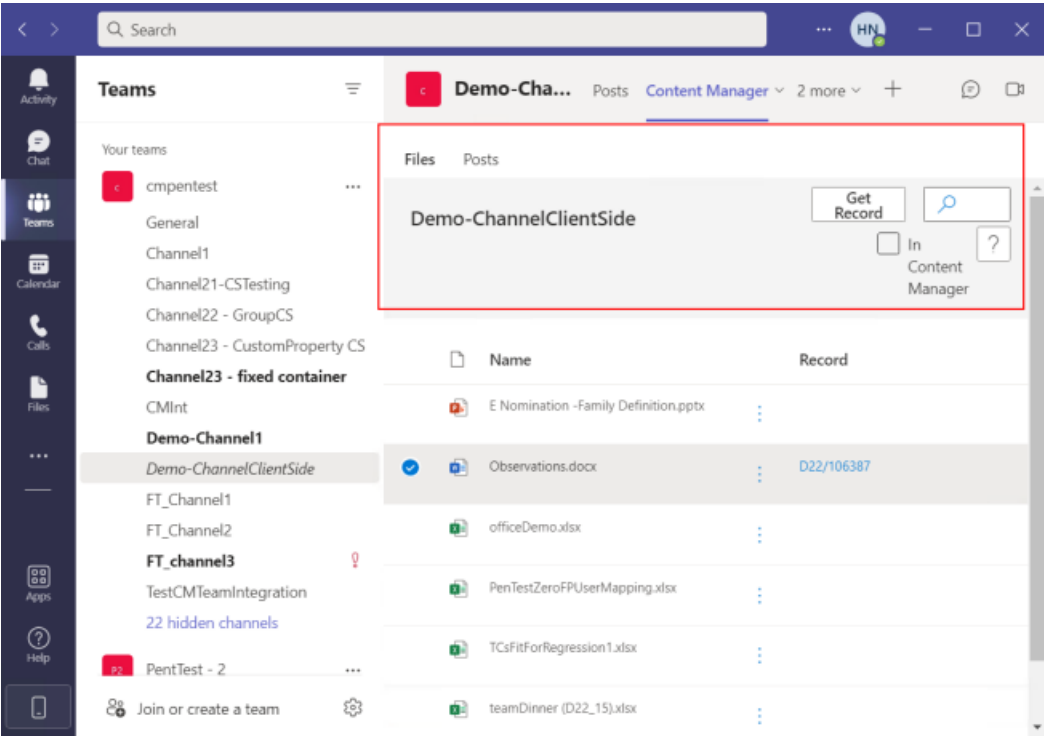
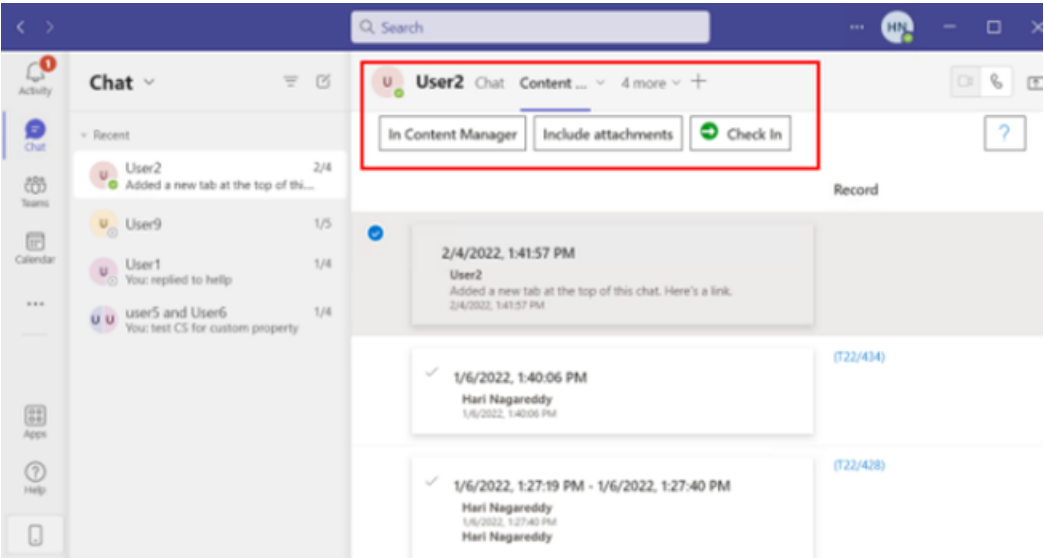
A polling frequency feature lets administrators control the reading interval of channels and chats for record creation. This functionality, along with the additional controls that help split chats into separate records, helps maintain coherence when searching for records created by the integration.

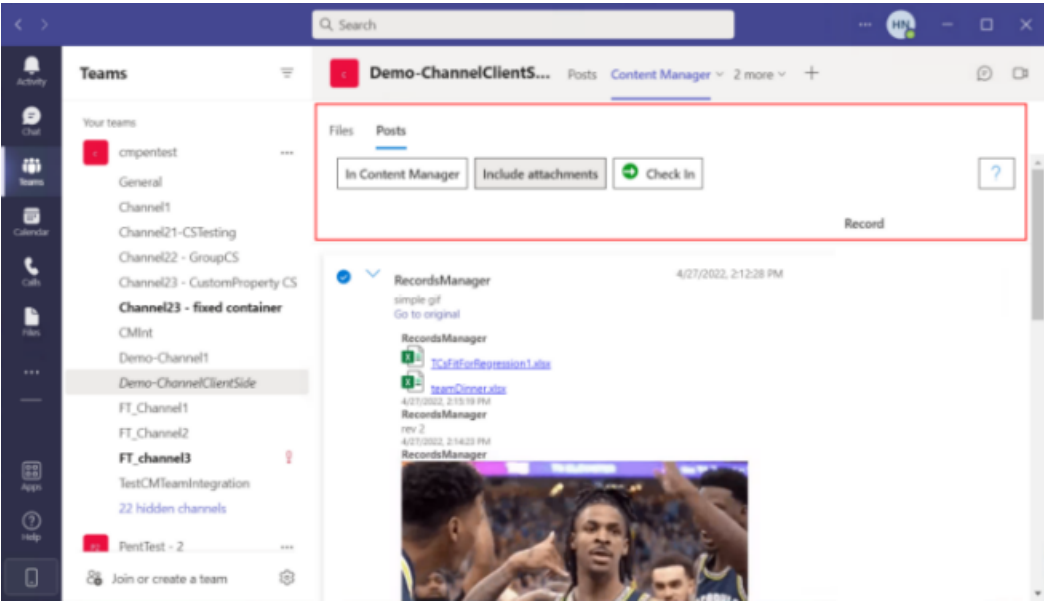


Group chats, as well as individual user chats, can also be configured to be captured automatically as records into Content Manager. This configuration is done in a similar manner to the configuration of Channels, but it's done via the **People** group in the Content Manager app.

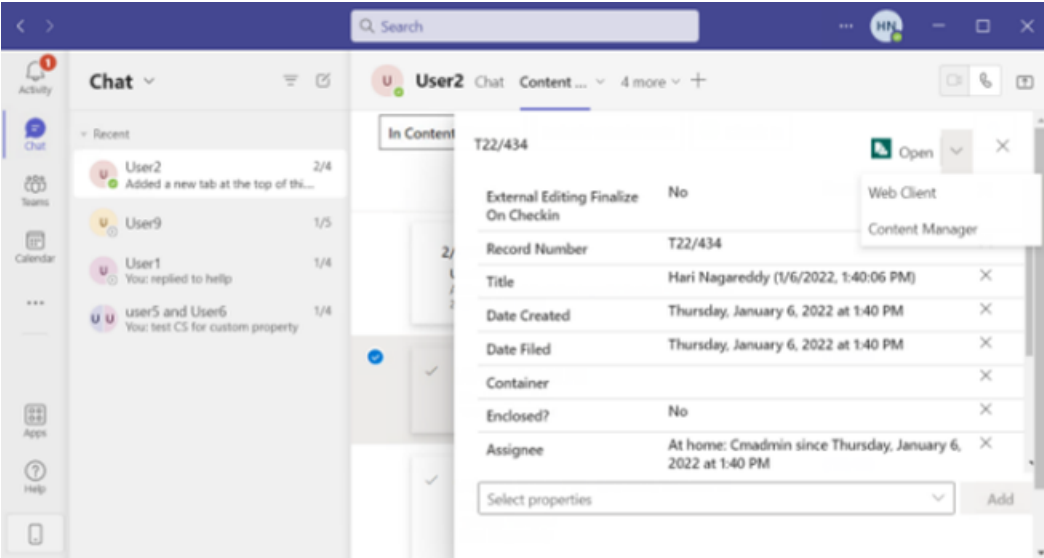
Files that are associated in a Channel or added to a post can be created as records in Content Manager. Content Manager recognizes duplicate posting of the same file within the MS Teams application and will only create a single record for a shared file. The files that users have in their OneDrive instance, that is accessible via MS Teams, can also be created as Content Manager records from MS Teams via the **My Files** group in the Content Manager app.

Organizations may prefer to allow users the flexibility to capture Teams channels, chats, group chats and files manually. The integration allows for this, as well as the automated process described. Using the Content Manager tab available in the MS Teams Chat or Teams pages, users can select which chats they want to create Content Manager records with and check these in using the Check In option.



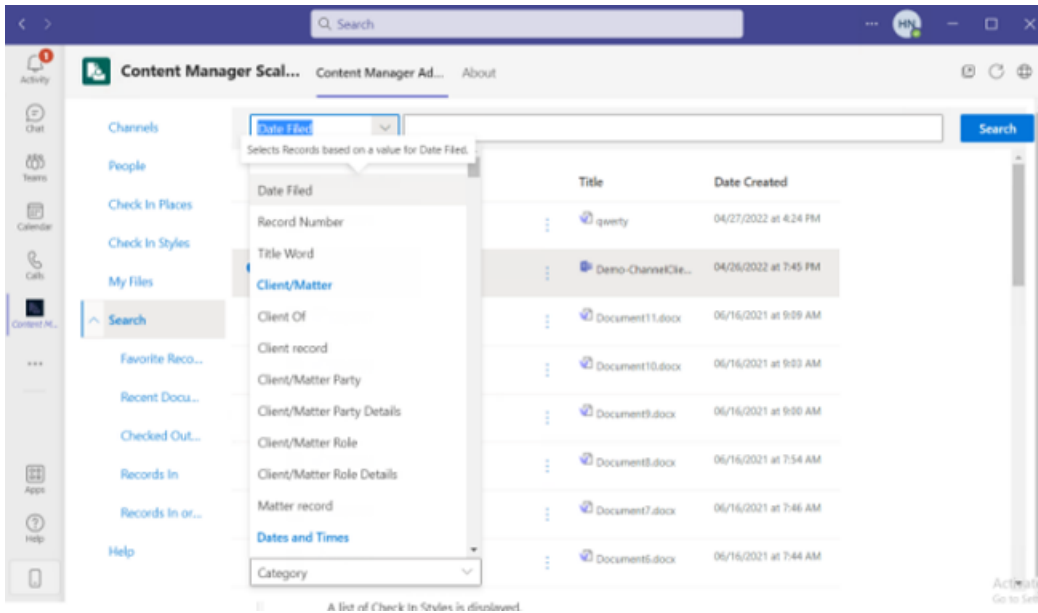


For chats that have already been checked into Content Manager, users can view the record properties from the **Chat** page – **Content Manager** tab, and if required, they can open the record in the Content Manager client, or the Web Client.



Check In Styles are used by the MS Teams integration to apply the default record details used when creating records. Check In Styles can be created and managed directly from MS Teams, in the Content Manager app, in the Check In Styles group.

From the Content Manager app in MS Teams, users can search for records, view record properties, as well as adding records to their Favorites list.



See *CM10.1_MSTeams_Integration.pdf* for details on installation and configuration requirements.

Content Manager Mobile App

Theme: User Experience

The new Micro Focus Content Manager Mobile app is a native application that enables users to securely access Content Manager records from their mobile phone devices. The Content Manager Mobile app is available on both Android and iOS platforms and can be downloaded and installed from their respective stores, Google Play or Apple App Store. Mobile users can now create records while out in the field, including attaching mobile artifacts such as photographs and documents, from their mobile device, as well as search for and view existing records in their organization's Content Manager dataset.

NOTE: This app has been designed and developed for use on mobile phone devices. If users have a requirement to access Content Manager from a tablet device, the Content Manager Web Client must be used.



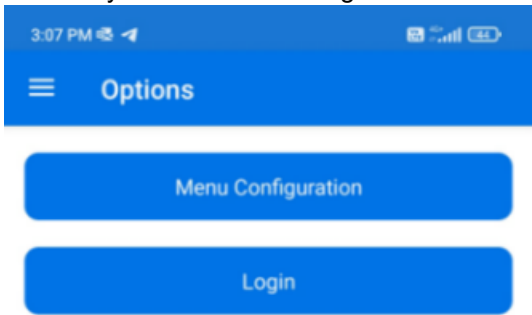
Version 1.0

Welcome, **Admin**

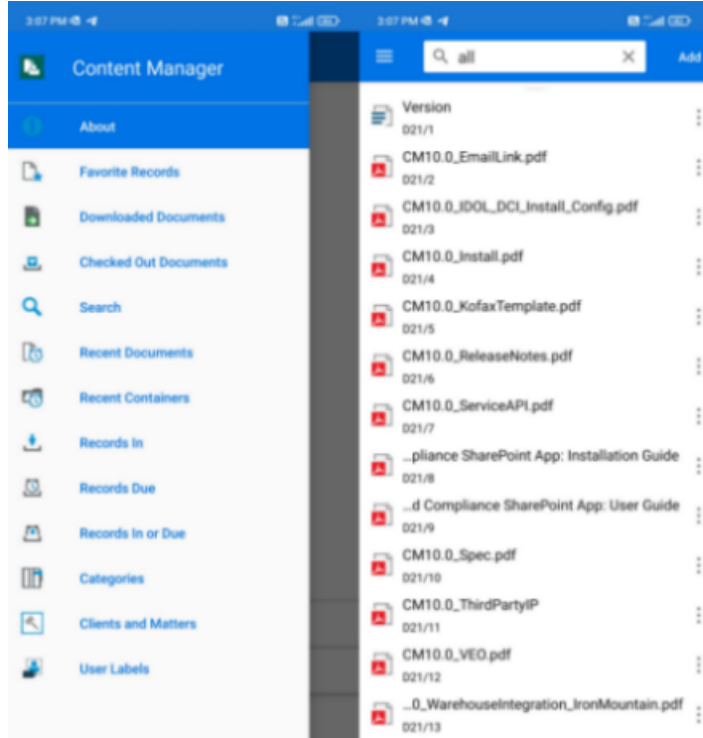
Help
Privacy Policy

The Content Manager Mobile App allows users to:

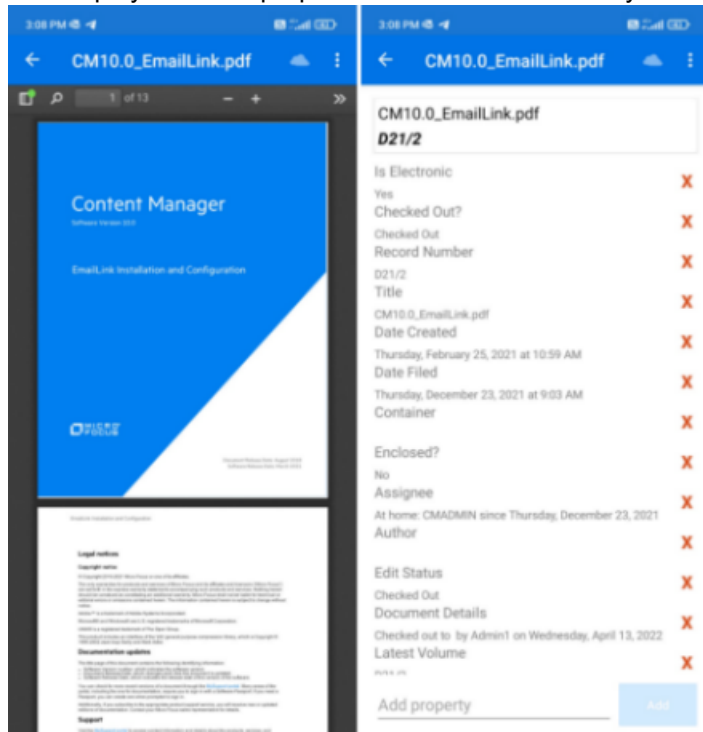
- Securely connect to their Organization’s Content Manager dataset



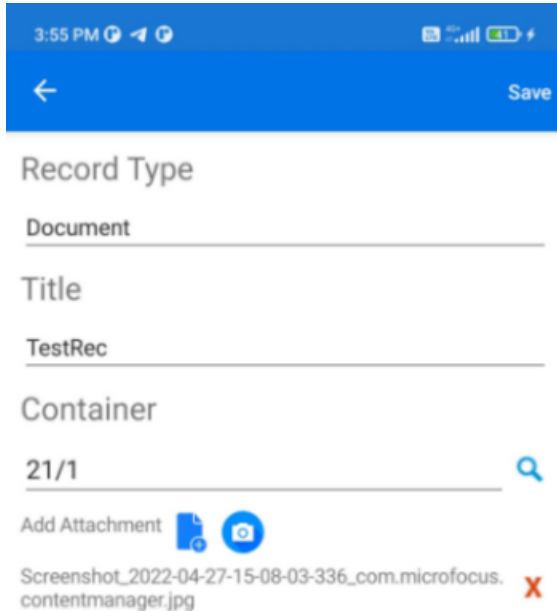
- Search for records using Content Manager tray/saved searches and string-based searching



- View electronic documents and record properties
 - Displayed record properties can be customized by the user

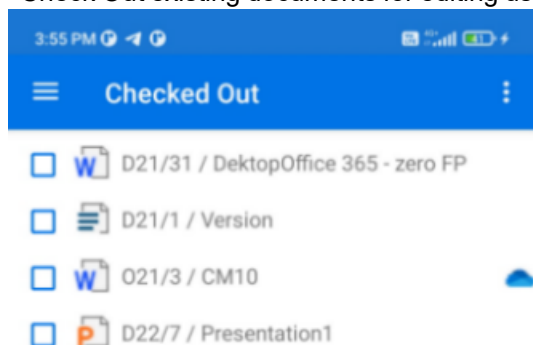


- Create new records with electronic document attachments



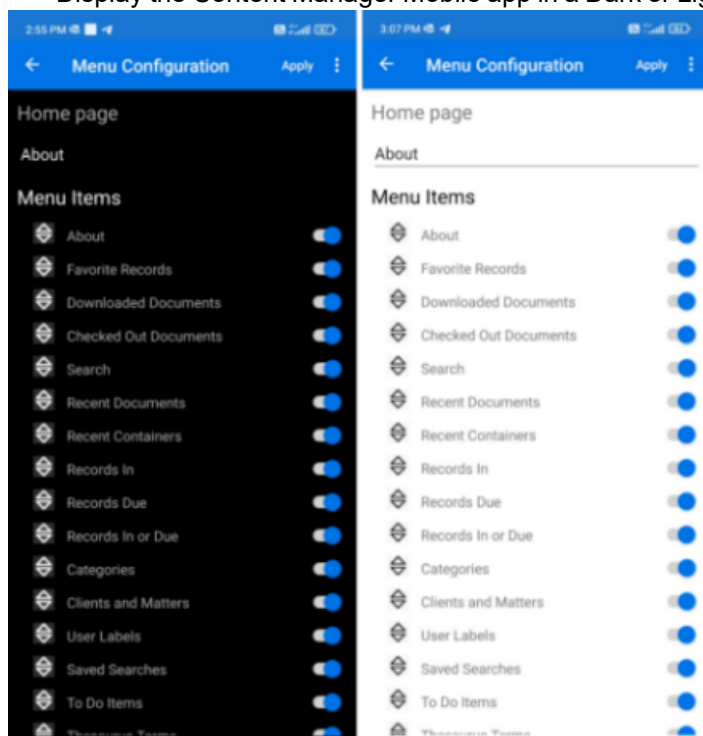
A screenshot of a mobile application interface for creating a new record. The top status bar shows the time as 3:55 PM and various icons. Below the status bar is a blue header with a back arrow on the left and a 'Save' button on the right. The form contains the following fields: 'Record Type' with the value 'Document', 'Title' with the value 'TestRec', and 'Container' with the value '21/1'. Below these fields is an 'Add Attachment' section with a blue circular icon containing a white plus sign. Underneath this icon, the text 'Screenshot_2022-04-27-15-08-03-336_com.microfocus.contentmanager.jpg' is displayed, followed by a red 'X' icon.

- Check Out existing documents for editing using a native application, such as Microsoft Word



- Download documents for offline viewing
- Edit and view Office documents in OneDrive

- Customize the look and feel of the Content Manager Mobile app to suit user's personal requirements
 - Display the Content Manager Mobile app in a Dark or Light theme



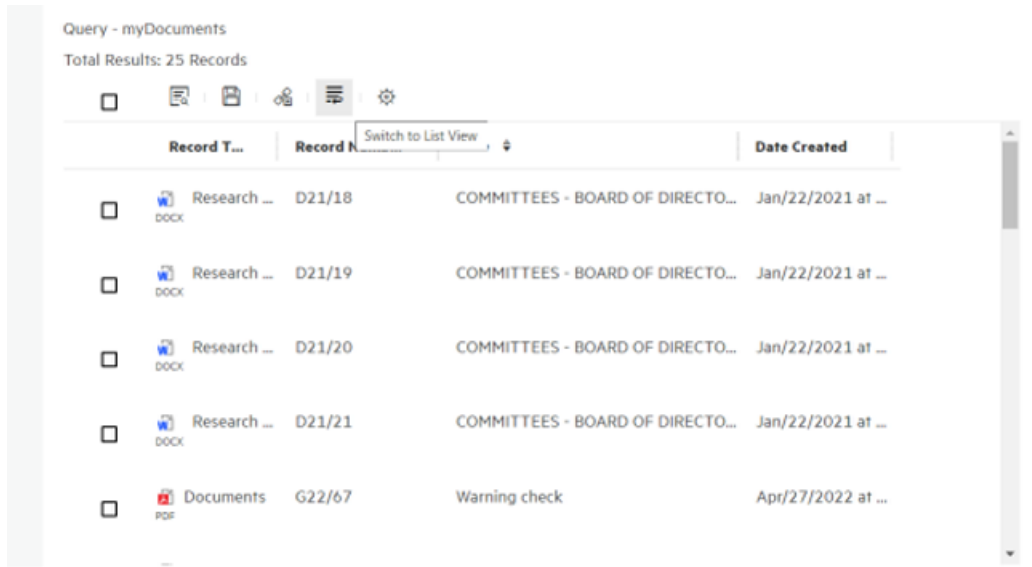
See *CM10.1_MobileApp_Setup.pdf* for details on installation and configuration requirements.

Content Manager Web Client

Theme: User Experience

Grid View

The Content Manager Web Client now includes an option to display search results in a grid view format, which provides a similar viewing experience to the Content Manager desktop client. The new grid view is in addition to the existing list view option and users can toggle between the two options, allowing for flexibility of working preferences and requirements, as well as user familiarity. Viewing data in a grid format provides users with the ability to quickly compare data, and users often find this format easier to understand and interpret.

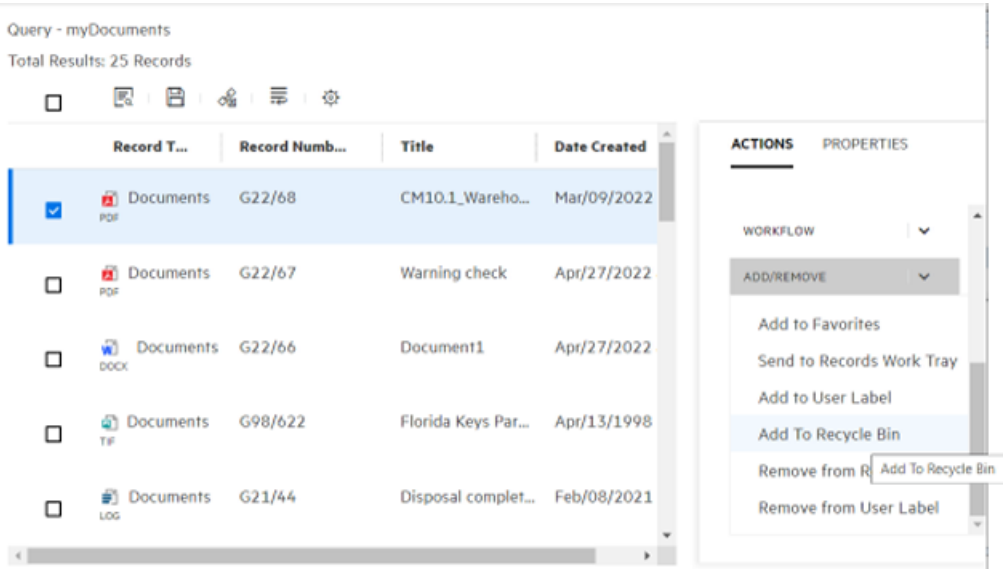


The new grid view provides a similar user experience to the grid view in the Content Manager client. Users can customize the columns included, or excluded, in the view using the Column Selection option; the order of the columns can be re-arranged by dragging and dropping and they can change the sort order of the displayed items within the column by clicking on the column header. For those users who have a requirement to use both the Content Manager Web Client and client applications, the column settings will be applied when updated in either application. The exception to this is the column width settings, only the client settings will be pushed to the Web Client, changes made to the column widths in the Web Client will not be reflected in the Content Manager client. This behavior allows users who have a requirement to work with both applications to have a consistent look and feel when viewing and working with Content Manager objects.

Working with objects in the Content Manager Web Client is still the same, regardless of the display view being used. The Properties/Action panel is opened by a single click on an object, and users can still update multiple items, where supported, when they are using the new grid view.

Recycle Bin

The ability to send records to the Recycle Bin from the Content Manager Web Client has been introduced in 10.1. The Recycle Bin functionality in the Web Client is the same as the behavior in the client. Records are sent to the Recycle Bin via the **Action** panel, **Add/Remove - Add to Recycle Bin** option, and the user must select a reason for recycling as a part of the recycling process. Once records have been sent to the Recycle Bin, they will only be accessible by users who have the required user permissions to access them from the Recycle Bin tray displayed from the masthead menu **Records – Recycle Bin** option, and if required, the users with appropriate permissions will be able to Restore records from the Recycle Bin in the Web Client.



Content Manager Client

Theme: User Experience

Ability to compress the logs

You can now compress the logs of Content Manager Client and Enterprise Studio. The **Zip Logs** allows you to compress the log files to a .zip file. The **Zip Logs** is available in the **Setup Information** of Content Manager Client and the Enterprise Studio. Navigate to **About > Setup Info > Zip Logs**.

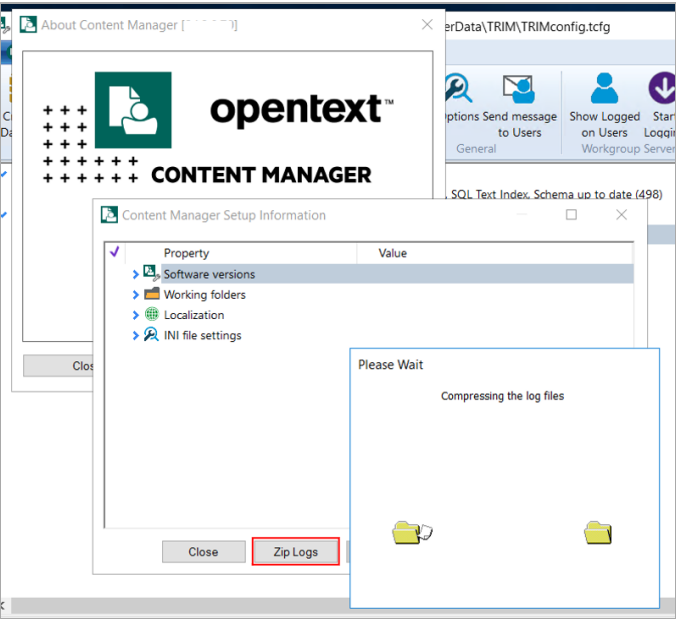
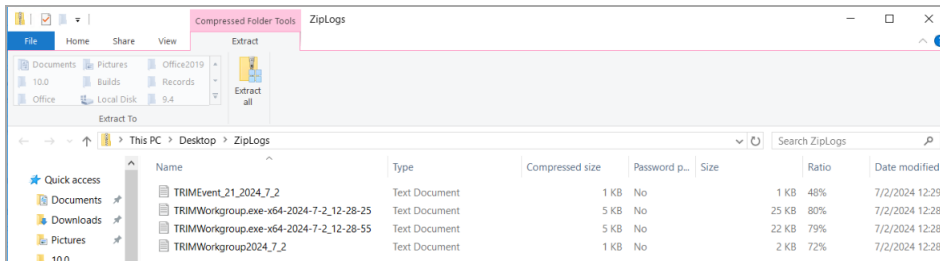


Figure 1: Zip Logs in Setup Information**Figure 2: .zip file in File Explorer**

For more information, see *Content Manager* help.

Property Editor

The new Property Editor option allows users to update the properties of Content Manager objects, either as a single object update, or as a multiple object update. The advantage of the Property Editor is that it allows for the update of properties that were previously only accessible from the object property form which meant that objects, such as Record Types, could only be updated one object at a time. In 10.1, using the Property Editor, the object properties on multiple objects of the same type can be updated in a single update.

The Property Editor is accessed via the right-click menu on supported objects.

The supported objects are:

- Records
- Locations
- Record Types
- Classifications
- Thesaurus Terms
- Retention Schedules
- Consignments and Consignment Templates
- Holds
- Workflow Templates
- Origins
- Check In Styles
- Document Queues
- Spaces
- Meetings

NOTE: As a result of the introduction of the **Property Editor**, some of the right-click menu options are no longer required and have been removed. These are:

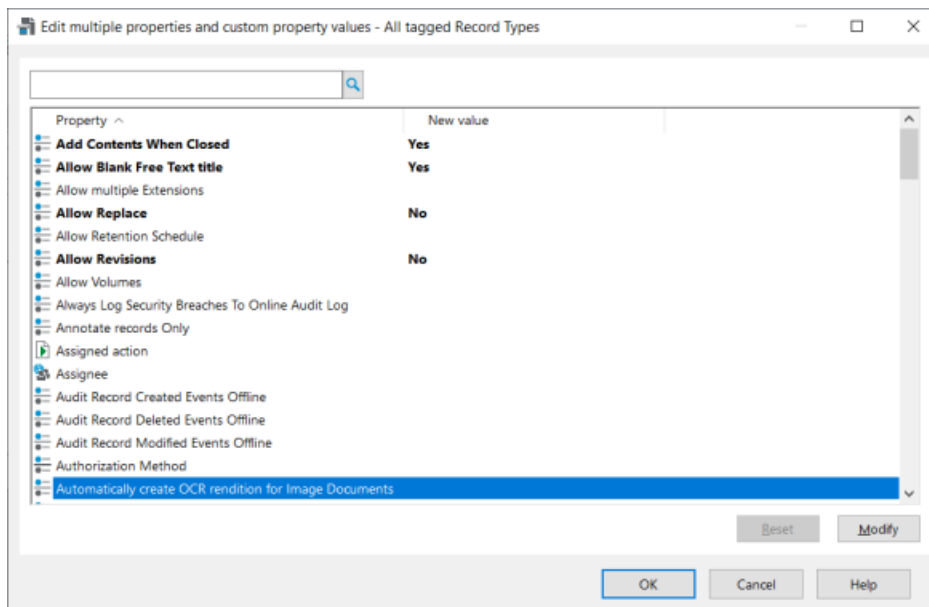
Records

- Details – Dates
- Details – Record Class
- Details – Other Record Fields
- Details – Custom Properties/ Additional Fields

Locations

- Custom Properties/ Additional Fields
- Other Location Fields

For other objects, where it was supported, the Custom Properties/ Additional Fields right-click menu option has been removed.

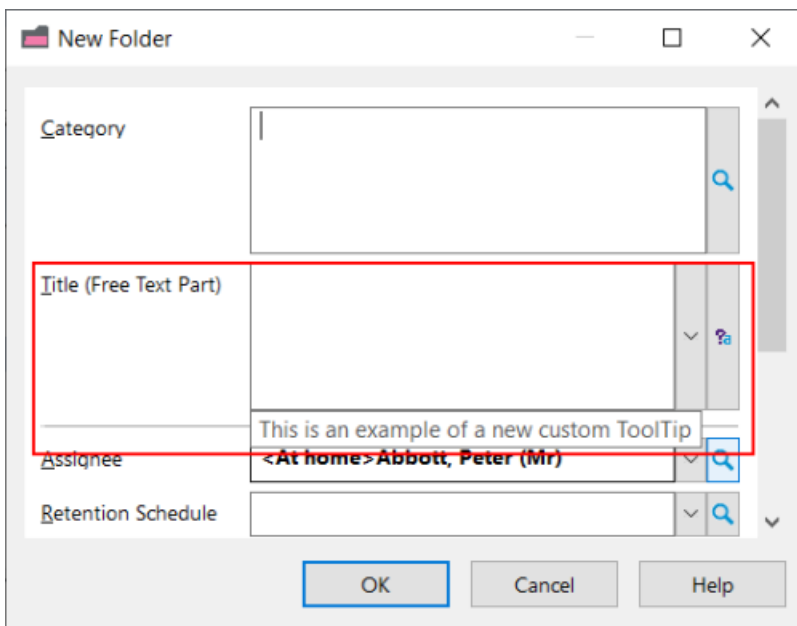


Custom Tooltips

As an extension to the options to add Placeholder Text within fields and Custom Text fields on Record Entry forms that were introduced in 10.0, Administrators now have the option to add custom Tooltips to fields on Record Entry forms via the new Tooltip tab available on the Form field Properties dialog.



These custom ToolTips will be displayed when users hover their mouse over the field on the Record Entry form.

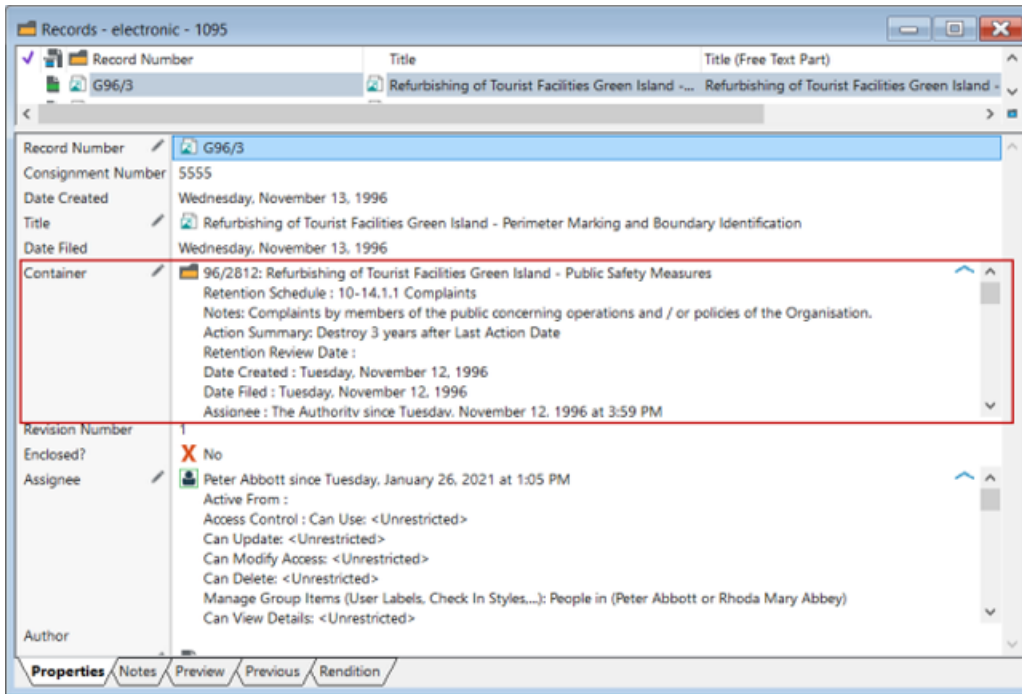


Cascade Properties

In the View pane for objects, it is now possible to include properties of the parent property on the child object's view pane, so details of the parent object can be seen without having to navigate from the child object. For example, on records, users can include the additional properties about the container on the contained record's view pane. Only properties that can have properties, such as objects, can

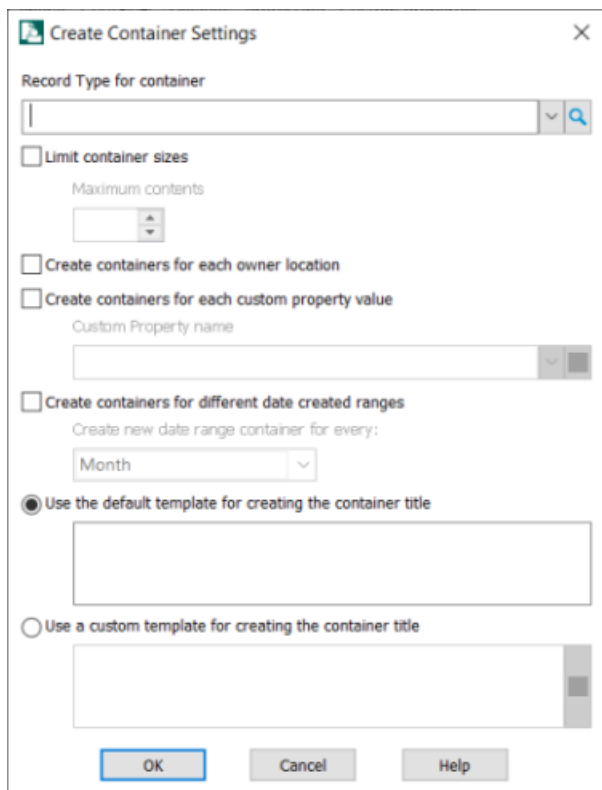
have Cascading Properties applied to them in the view pane. To allow for Cascading Properties to be configured on supported property types, the **User Option – User Interface - Show Cascade Properties in View Pane for Object Properties** must be enabled.

For properties in the view pane that have content that is longer than two rows, there is now the ability to expand and collapse the property row to allow improved access to the content in the property row. Where appropriate, a scroll bar will also be added to the property row in the view pane.



Automatic Container Creation

The automatic creation of records to be used as a container for new records can be configured for Classifications that are available to the auto-classification process and Check In Styles. This automated container creation process was previously available for Origins, but its use has been extended and enhanced in 10.1. Using the Create Container Settings on the supported object types, Organizations can configure the record type to be used for the automatically created containers, when containers should be created, as well as defining the metadata to be added as the container's title.



Create Container Settings

Record Type for container

☐ Limit container sizes

Maximum contents

☐ Create containers for each owner location

☐ Create containers for each custom property value

Custom Property name

☐ Create containers for different date created ranges

Create new date range container for every:

Month

☒ Use the default template for creating the container title

☐ Use a custom template for creating the container title

OK Cancel Help

When new records are created using Origins, Classifications, or Check In Styles that have the Create Container settings configured, whenever records that require a container to be created, based on the settings defined, a new container will be automatically created, and the record contained within in.

Event Monitor in client

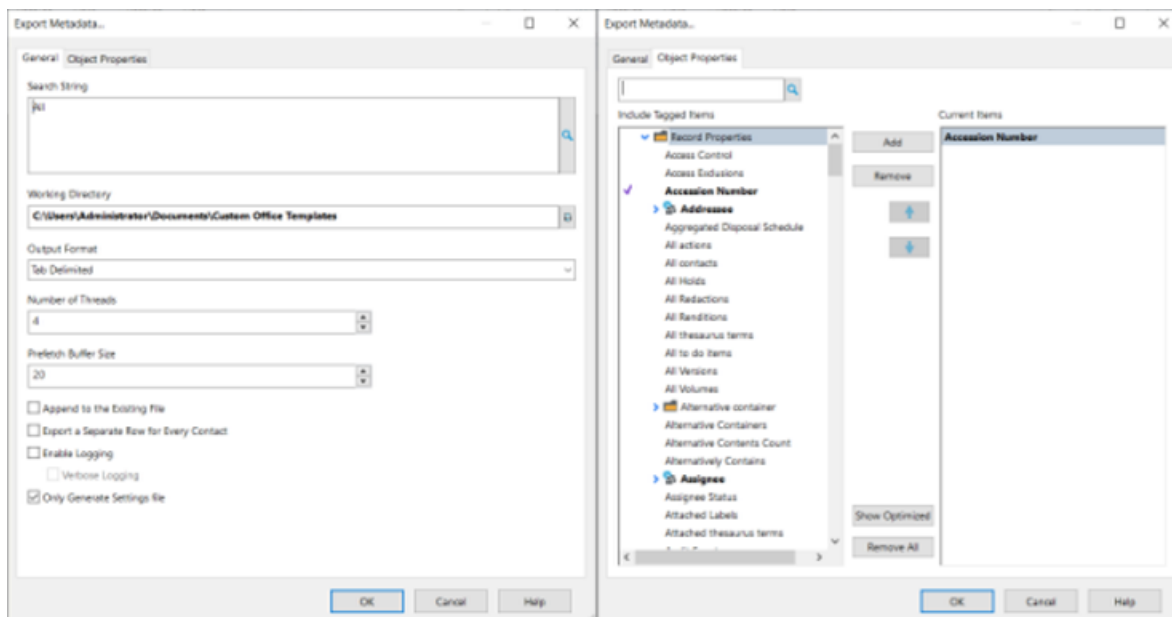
The Event Monitor option in the Content Manager client gives users with the required permissions to Content Manager, but who do not have access to Content Manager Enterprise Studio, the ability to monitor the Event Processing status for the available Workgroup Servers.

To access the Event Monitor in the Content Manager client, from the **Administration** ribbon, in the **Other** group, click **Event Monitor**.

The **Event Monitor** window will open displaying all active events with their processing data.

Export Metadata

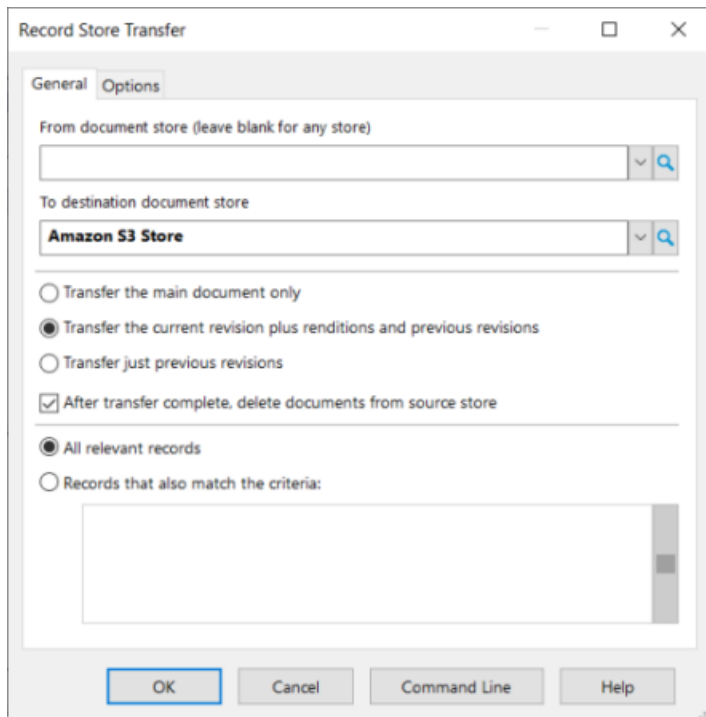
The Export Metadata Tool is a new utility available in the Content Manager Client, or it can be invoked using the Content Manager command line interface. As the name implies, it may be used to export the metadata associated with existing records. The interface and functionality are closely modeled on the existing Print Merge tool, but with one major improvement, namely optimized fields. These are fields that can be efficiently retrieved from the database, so exporting 'only' these fields can greatly improve export operations. Currently it only supports the exporting of Records.



Record Store Transfer

Accessed via the **Administration** ribbon, in the **Other** group, the new **Record Store Transfer** feature provides support for the migration of electronic records from normal document stores to SEC-compliant stores. Using this feature organizations can define what components of records, that is, the main document, renditions and revisions, are to be included in the transfer. As this new transfer option is not an 'all documents to a new store' transfer option, it may also be useful for organizations who have a requirement for geographically localized stores to their users as it allows for the transfer of specific documents to different stores.

This Record Store Transfer feature can also be run via the **Content Manager Administration Command Line Tool**. The required settings file is generated via the Content Manager client Record Store Transfer dialog, and then can be executed using the Command tool.



Theme: Total Cost of Ownership

XDMS (External Document Management System) Integration

Some new API methods have been added to allow records to be linked by an External Identifier to an external document management system. The primary purpose of implementing this linkage is to allow the advanced retention system to incorporate a confirmation loop to ensure the external document system doesn't get left with pointers to orphaned records.

As part of the advanced disposition feature, Content Manager automatically detects consignments that contain externally managed records and then requires an acknowledgment from the external system before disposal can proceed. This applies only to "Destroy" consignments, the acknowledgment can be done either manually using the user interface or automatically by having the external system poll the SDK for records pending destruction.

The following Content Manager objects constitutes the XDMS system:

- New Record types (External DMS Folder/Document)
- New state with consignment approval process to confirm from the external system to proceed with disposal process.

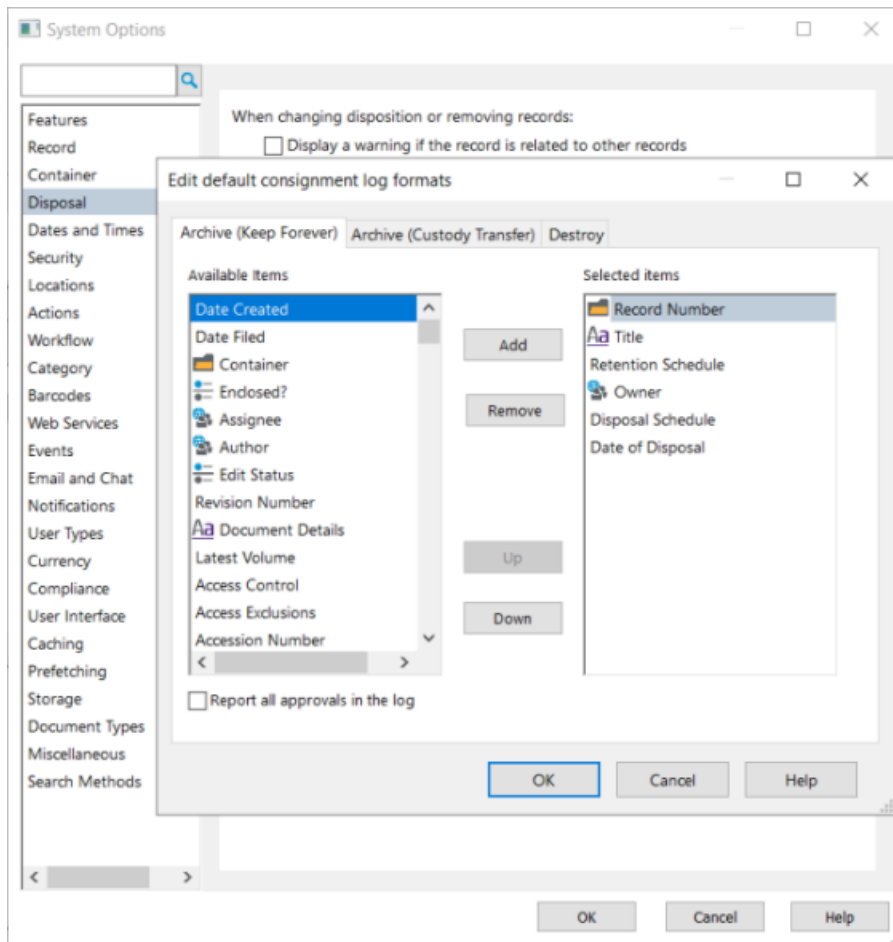
Theme: Lifecycle Management

Advanced Disposal Processing

As a part of the Advanced Disposal Processing feature, a new component has been introduced, Consignment Templates. Multiple Consignment Templates can be created for each Consignment type and they allow Organizations to create generic templates that can be used as a starting point for the creation of Consignments. These templates can also be used for automating the process of creating Consignments using the Content Manager Administration Command Tool, or via the Windows Task Scheduler.

The screenshot shows a 'New Consignment Template - Archive (Custom)' dialog box. It has four tabs: General, Selection, Approvals, and Examination. The 'General' tab is selected. The 'Description' field contains 'Transfer Consignment Template'. The 'Archivist' dropdown shows 'Abbott, Peter (Mr)'. The 'Transfer To location' dropdown shows 'Storage 1'. There are three checkboxes: 'Use location from schedule if specified' (checked), 'Wait for a transfer acknowledgment before disposal' (unchecked), and 'Keep electronic documents after transfer' (unchecked). There is also an unchecked checkbox for 'Render records to long term storage format (PDF)'. The 'Round up cutoff dates to' dropdown shows 'End of Month'. The 'Prefix to use when generating consignment numbers' field contains 'TC'. The 'Consignment log report format' dropdown shows 'Use Default' with a 'Customize' button next to it. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

There is now also the option to create a default **Consignment Log Layout** for each Consignment type via the **System Options – Disposal** page. A default log format can be created for each type of Consignment to contain specific record metadata relevant to the Consignment type, and can be selected to use on Consignment Templates, or Consignments as they are created. Organizations can also modify this layout 'on the fly' on individual Consignment Templates or Consignments, if required.



Microsoft Office Integration

Theme: User Experience

Email notifications - support secure SMTP servers with STARTTLS

Content Manager 10.1 supports the STARTTLS security option for connecting to SMTP servers, when sending email alerts and notifications. This option is necessary when using an Office 365 mail server. This new option is accessed and configured in the Content Manager Enterprise Studio, from the **Home** ribbon, in the **General** group, click **Options - Email Notifications** tab.

Content Manager SharePoint Governance and Compliance

Theme: User Experience

Folder mapping for Owners

When folders are created in Content Manager from a SharePoint library, the Owner of the folders is assigned to the System Administrator account. This automatic assignment of Owner can become an issue when creating Consignments that require Owner approval, as the Owner is a System Administrator account, rather than a business Owner. As a result, a manual review of each SharePoint folder to determine the appropriate Owner before the Consignment is created is required.

This new feature allows the mapping of the Owner column in SharePoint to the Content Manager Owner field for folders.

Content Manager Infrastructure

Theme: Azure performance

Global Temporary Table

The feature of Global Temporary Table for Azure SQL database is supported in Content Manager.

Theme: Cloud Optimization for MSP vendors

Single Sign On with OpenID Connect

OpenID Connect authentication in Content Manager has been enhanced so that Content Manager and all Content Manager integrated applications share the same logon credentials, in the same user session. Consequently, users with multiple Content Manager applications only need to log on once, and when they sign out, they are automatically signed out of all Content Manager applications.

Theme: Total Cost of Ownership

SQL Text Indexing

IMPORTANT: Please see [Upgrade Considerations](#) for information on upgrading to 10.1 and SQL Text Indexing.

A pre-requisite for using SQL Text Indexing on MS SQL Server and Oracle, is that you must have their associated 'full text' features installed and configured before upgrading or enabling

SQL Text Indexing. PostgreSQL has built in support for text searching, so no additional components are required.

In 10.1, the Content Manager text indexing engine that has been in place for many years has been fully replaced with the Structured Query Language (SQL) text indexing capabilities built in to modern relational databases. This capability was first introduced in Content Manager 10.0 as an alternative. From 10.1 onwards SQL text indexing is the only way to index metadata such as titles, notes, text type Additional Fields, Classifications, Location Addresses and Names and so on.

The introduction of SQL Text Indexing now indexes the Notes fields of other Content Manager objects, such as Locations, that were not indexed in earlier releases of Content Manager. Indexing these Notes fields allows users to now be able to search on the Notes fields for supported objects.

AWS Storage - new authentication options

Content Manager 10.1 supports two new authentication options for AWS S3 document stores - Amazon Security Token Service (STS), and EC2 Instance Metadata Service (IMDS). The STS option is necessary for accessing storage in the AWS C2S offering, while the IMDS option allows a Workgroup Server running on an EC2 instance to use local EC2 metadata to connect to S3.

Post-install client configuration

The Content Manager client installer contains a file CMClientConfig.xml, which allows the specification of datasets and HKCU registry values. This file can be customized with site-specific settings and then replaced in the Content Manager client installer. The settings in CMClientConfig.xml are applied the first time Content Manager runs after installation.

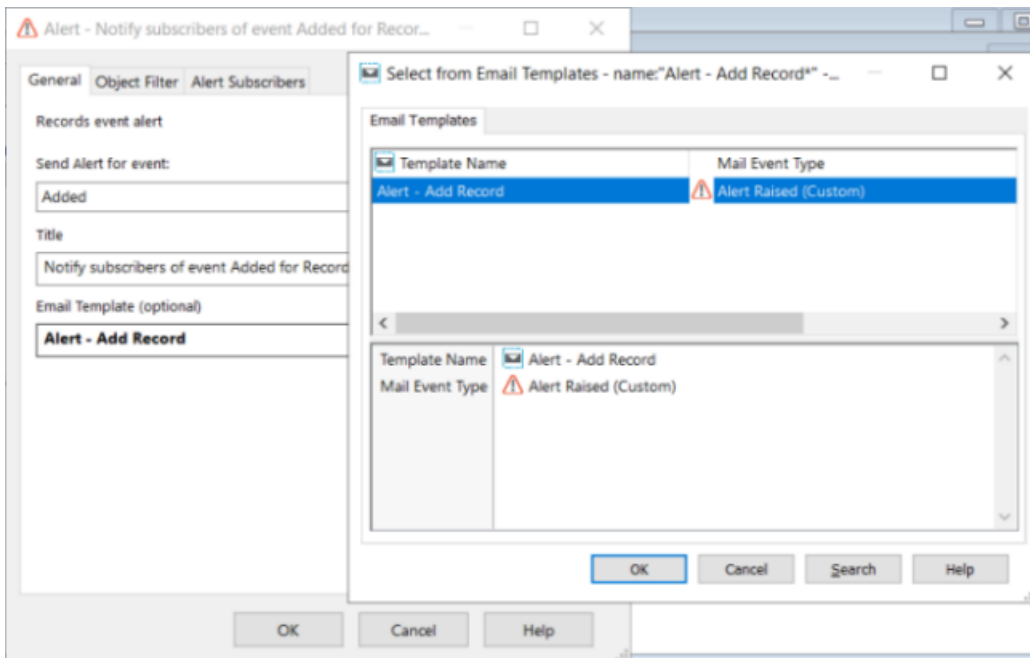
Enhanced Features

Content Manager Client

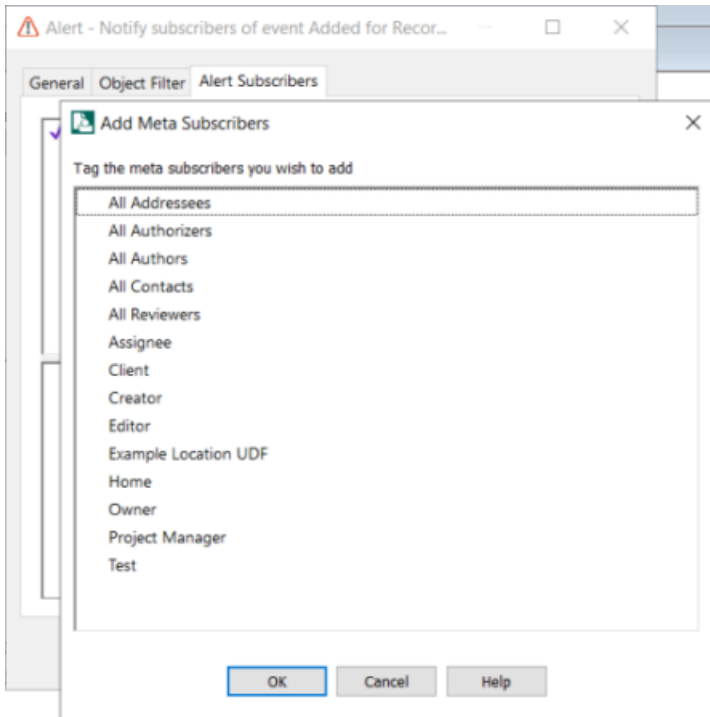
Theme: User Experience

Alerts

When creating or modifying Alerts, users now have the option to associate a specific Email Template to be used when sending the Alert email notification. These Email Templates are only available for use on Alerts, and are Alert object type specific, they cannot be accessed via the Administration – Email Templates dialog.

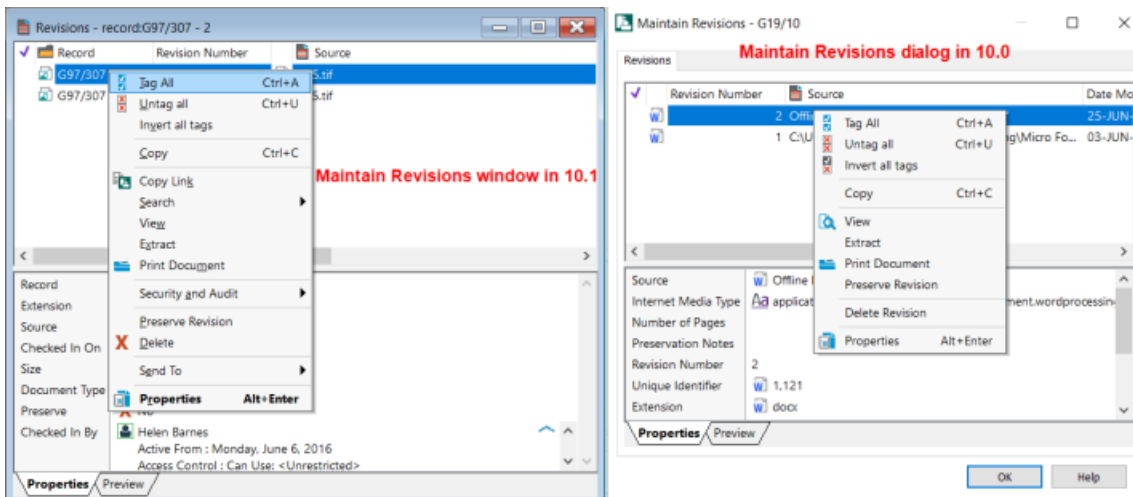


For Alerts created for records, there is a new option for the Alert Subscribers which allows the ability to select a meta subscriber, rather than individual locations. Each location that is associated to the selected metadata type(s) that have a valid email address will receive the alert. For example, All Addressees of the record will be subscribed to the Alert.



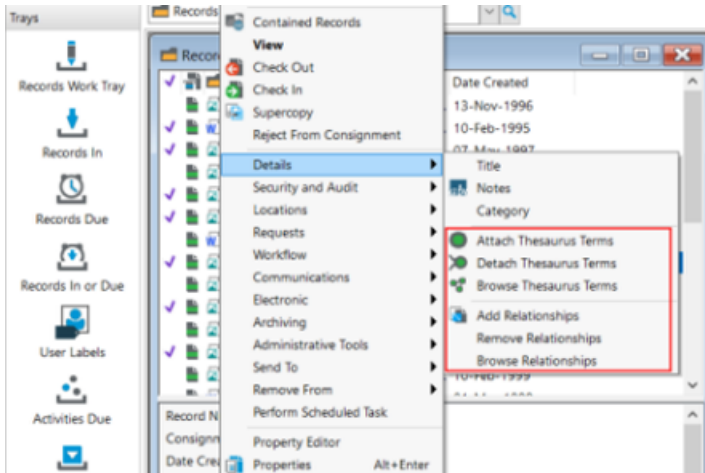
Revisions

The limit on the number of Revisions has been updated and there is now no practical to the number of Revisions that can be added to records. As a result of this increase, Revisions are now a main record object. Due to this change, records no longer have a Revisions page as a part of the Properties form. The Revisions window is accessed via the record's right-click Electronic – Revisions menu option, all menu options that were previously available on the Revisions page, and the Revisions dialog, are available in the Revisions window. Whilst there is an SDK change, see SDK Breaking Changes, the end user processes for creating Revisions has not changed.

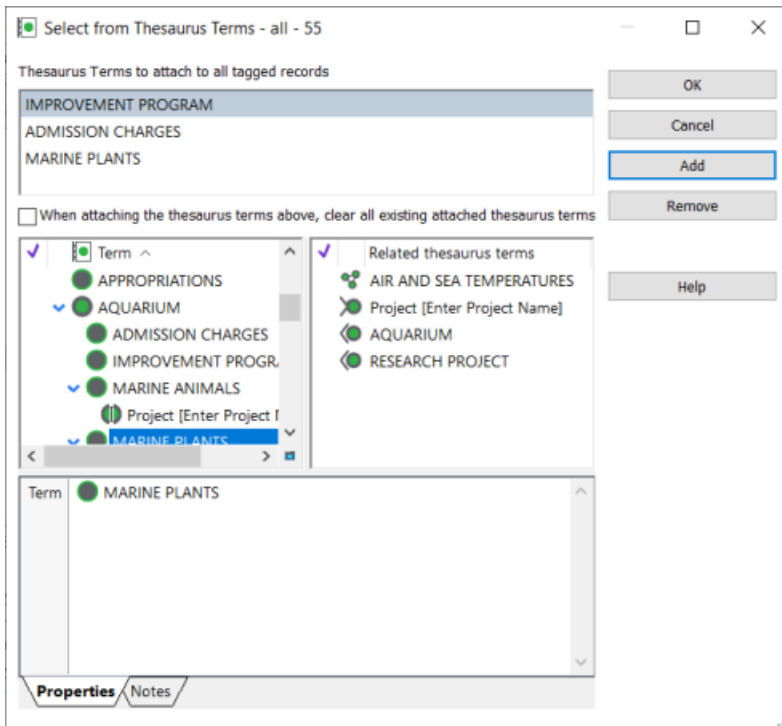


Working with Thesaurus Terms and Relationships

The process to add and remove Thesaurus Terms and Relationships on multiple records has been enhanced. For Thesaurus Terms and Relationships new menu options have been added to the record right-click **Details** menu.

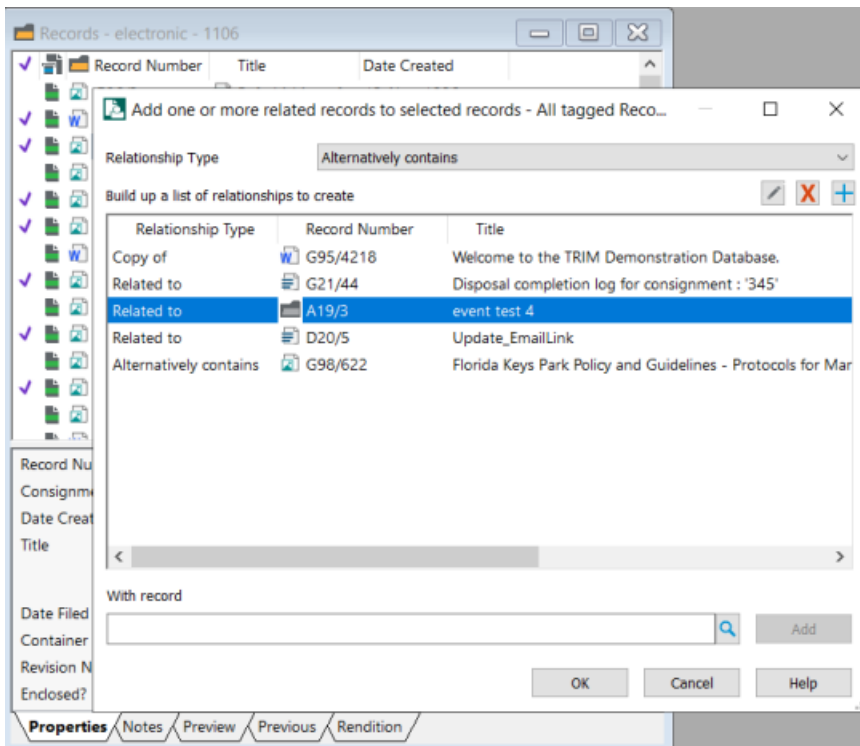


The dialog used to add and remove Thesaurus Terms is familiar to users as it is the same dialog used in earlier releases of Content Manager, but we have now separated the add and remove options to make it a clearer process for users updating Thesaurus Terms for a tagged set of records.

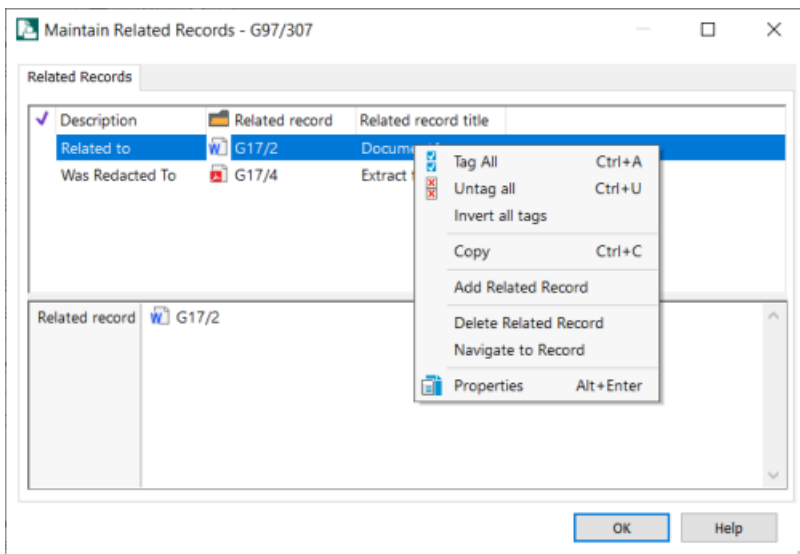


A similar process has been included for record Relationships. Using the Related Records dialog, a user can create new relationships that can be added to multiple records or identify the record

relationships that should be removed from multiple records. Again, this dialog is familiar to users as it is the same used in earlier versions of Content Manager when adding record Relationships, but we have now extended its use to allow users to also be able to remove record Relationships from a tagged set of records.

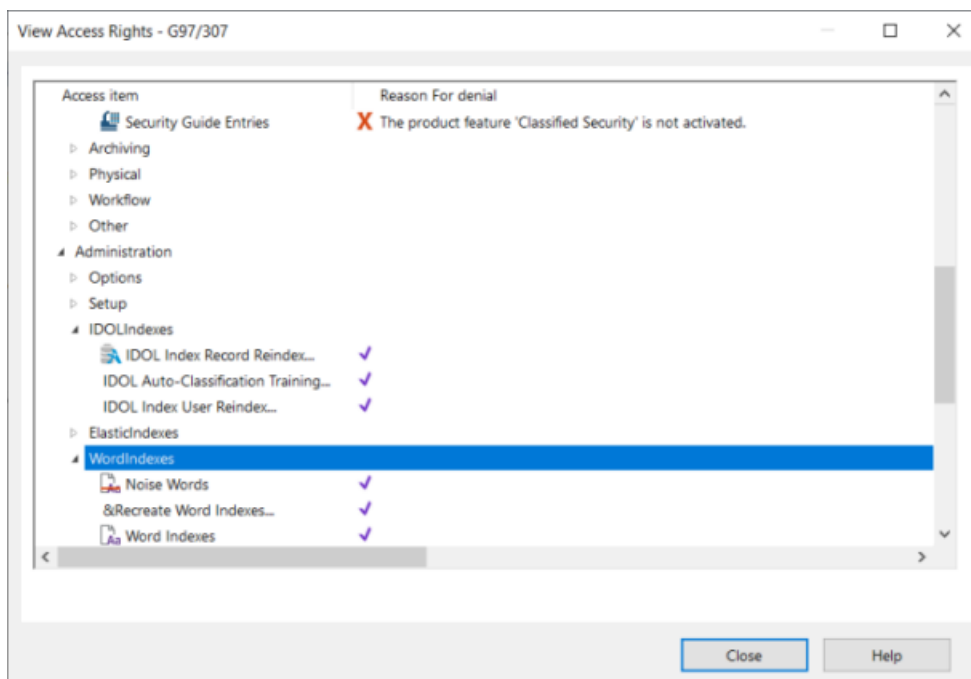


The **Maintain** dialog, which is opened using the right-click **Details - Browse** menu option, allows users to add, remove, or work with either the Thesaurus Terms or record Relationships for a single record, it cannot be used to update a set of tagged records.



View Rights - Ribbon tab

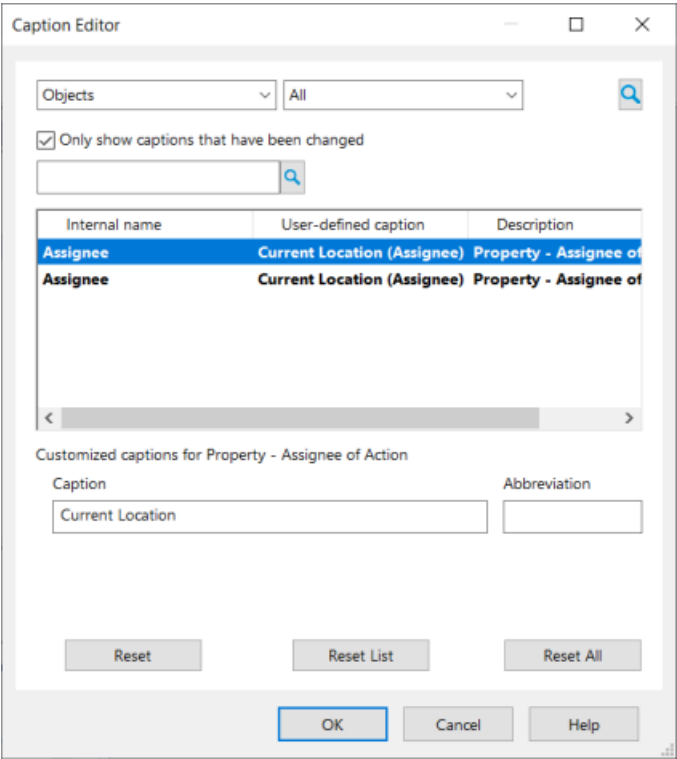
To enable easier access to determine why certain ribbon options are not available to a user in the Content Manager client, a new tab called **Ribbon** has been added to the **View Rights** dialog. Displayed in this tab are all the standard Content Manager ribbons (tabs), which can be expanded for each sub-group within the ribbon, displaying all Content Manager menu options with a **Reason for Denial**, if the button is not active.



Edit Caption improvements

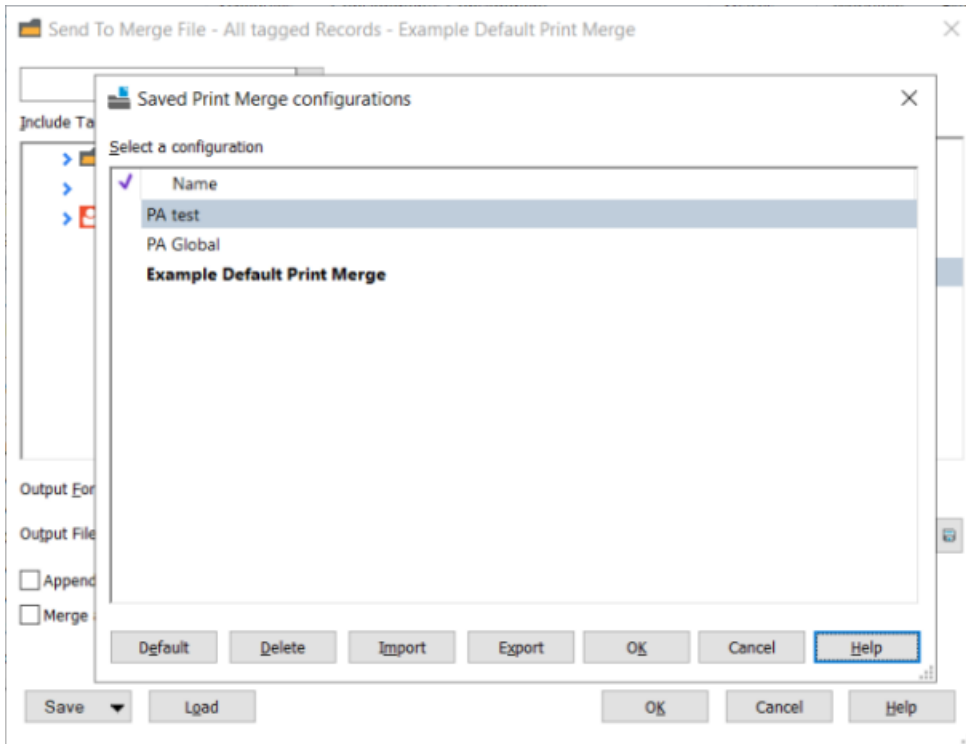
The **Edit Caption** dialog has been redesigned in 10.1. The dialog now allows Administrators to filter the displayed list of captions to show either Objects, Generic Items or User Option Sets, then to further filter the list to a specific object type, e.g., Actions other relevant filters, depending on the selected category. Administrators can also further refine the displayed list of captions to include captions that only match a particular search term. Captions that have the search term in the Internal Name or Description will be returned in the search list. Administrators will also notice that the displayed list of captions is no longer a hierarchical list, but rather an alphabetical list. The structure of the caption, that is, which object and type it is, is now included in the Description field.

For organizations who have customized captions, these can now be easily found using the **Only show captions that have been changed** option, and by using this in conjunction with the **Reset List** option, Administrators can quickly revert all modified caption names back to their default.

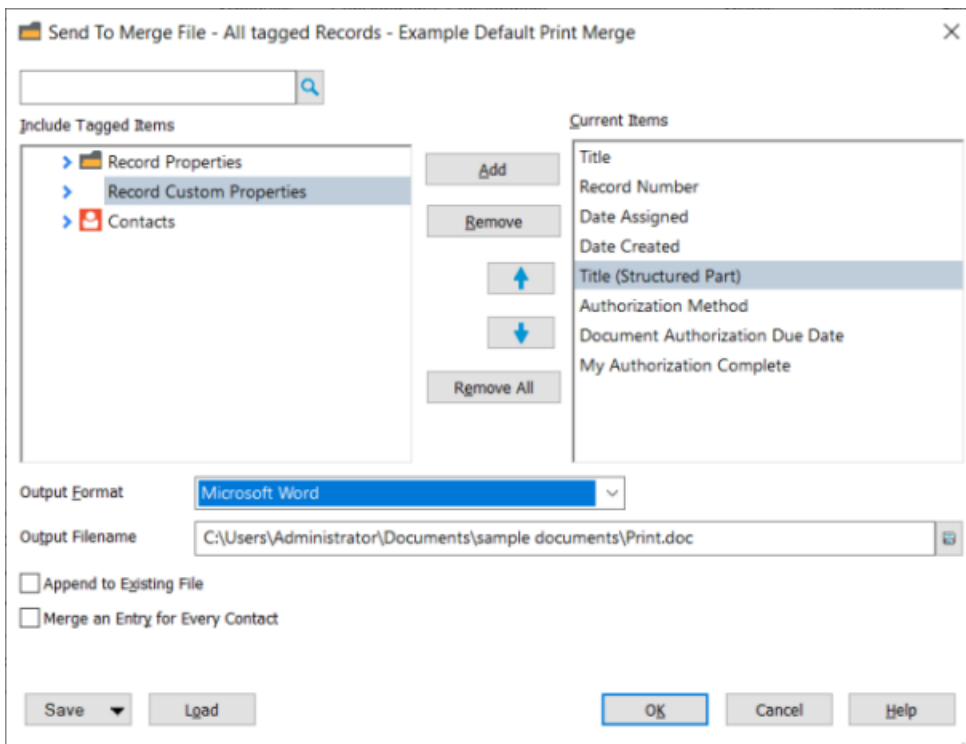


Print Merge improvements

The ability to create Print Merge Configuration files has been introduced. These Print Merge configuration files allow users to create template Print Merge files which can be saved for easier creation of Print Merge documents, shared with other users via an Export and Import function, and easily loaded via the Print Merge dialog, saving time and effort in having to rebuild a Print Merge each time they need to generate a Print Merge for the different tasks they complete. Using the Print Merge Configuration option, users can create a 'default' template, which will be applied each time they create a Print Merge document.



The Print Merge dialog has also been enhanced to include Add, Remove, and Remove All options, to also help easier building of a Print Merge. Users can now also rearrange the position of the items in the Print Merge document using the new Up and Down options.



Option to use a Check In Style for record creation

From the Content Manager User Options – Documents page, users can set a default Check in Style to be used when dragging and dropping a document on to Content Manager to create a new record. The Check In Style's Record Type will be selected by default on the Check In document dialog, and any default settings associated with the Check In Style will be applied to the new record. This default Check In Style will also be used when processing a dropped folder, or multiple documents.

Ability to set the format of the URL Link

When creating an URL Link from Content Manager, users now have the option to select a display format for the link, either Windows Client format, e.g., `contentmanager://record?DB=45&Type=97&Items=1&[Item1]&URI=1` or the format defined by the **Content Manager Web Server URL** in the **System Options – Web Services** page; Administrators can also set this option as a Global Setting, if required. The selected format will be used when a link is added to a document/email by dragging and dropping a record from Content Manager, or by using the right-click **Copy Link** option, which also allows users to create a single link for multiple records/objects.

Theme: Lifecycle Management

Transfer Consignment acknowledgment

As a part of a Transfer consignment, there is an option to flag a Consignment, or Consignment Template that the Consignment cannot be completed until acknowledgment that the transfer has been received by the Organization. In earlier versions of Content Manager, this flag was set on the Consignment as a part of the Disposal process, rather than during creation, which meant that it possible the disposal process could proceed without acknowledgment being received. To improve this behavior, for Transfer Consignments and Templates, the option **Wait for a transfer acknowledgment before disposal** is now available on the **Properties - General** tab.

New Consignment - Archive (Custody Transf...

General Selection Approvals Examination

Number
159

Description
Transfer to secondary storage

Archivist
Abbott, Peter (Mr)

Transfer To location
Storage 1

☒ Use location from schedule if specified
☒ Wait for a transfer acknowledgment before disposal
☐ Keep electronic documents after transfer

Cutoff Date
30-06-2022

☐ Render records to long term storage format (PDF)

Consignment log report format
Use Default

OK Cancel Help

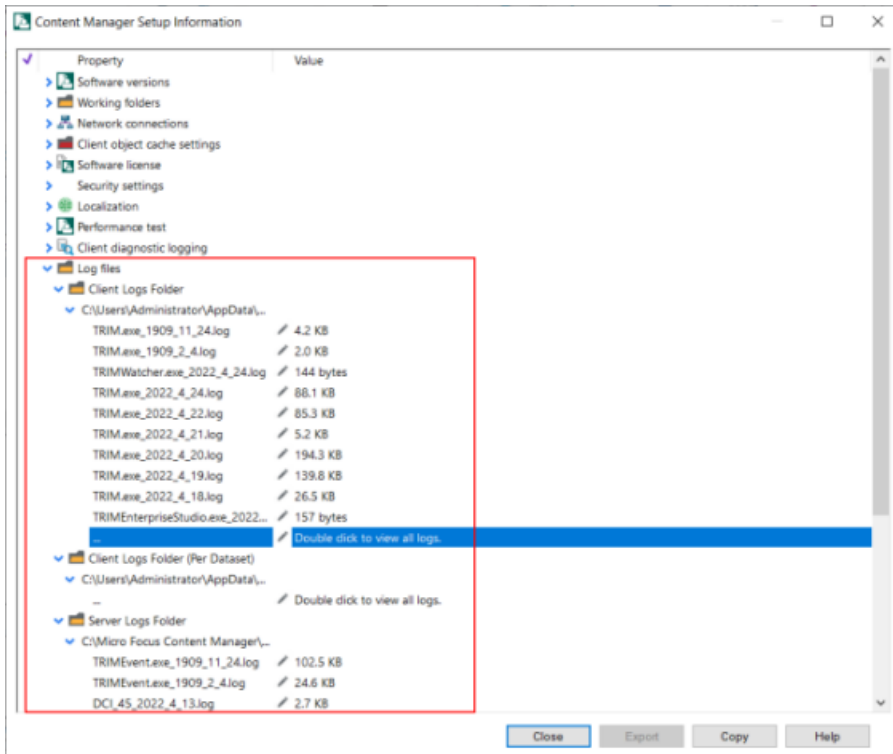
Theme: Total Cost of Ownership

Document Store Pools

In previous releases of Content Manager, when creating Document Stores, organizations had the option to associate the store to the general document storage pool. In this release, the Document Pool option has been extended to allow for multiple Document Store Pools to be created and assigned to Document Stores, or to Record Types, to allow Content Manager to save new electronic objects to the best available store within the selected pool.

Easier access to Log files (Setup Info)

To allow for easier access to the Log files generated by Content Manager processes, the Content Manager Setup Information window, accessed via the File ribbon, now contains a group called Log Files. Within this group, there are sub-groups for Client Logs and Server Logs, with a list of the latest log files that have been created available. The log files can now be opened directly from the Content Manager Setup Information window by double clicking the Edit option. The Windows directory where all the generated Content Manager log files can be opened directly from this window.



Microsoft Office Integration

Theme: User Experience

Improved support for remote workers in Office Integration

The Content Manager Microsoft Office integration (Word, Excel, and PowerPoint only) no longer attempts to connect to Content Manager as the Office Application opens. Instead, the connection is completed when the user chooses an action from the Content Manager ribbon, or from the Content Manager options in the File menu. This improves the experience of remote workers who may not always have a connection to Content Manager.

Obsoleted Platforms

No platforms have been dropped from the Support Matrix in Content Manager 10.1.

Please refer to **CM10.1_Spec.pdf** for details on the Support Matrix.

Obsoleted Features

- Support for EMC Centera Document Stores
- Record Annotation feature

NOTE: The record Redaction feature is still available.