Content Manager

Software Version 23.3

Release Notes

opentext™

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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.

To check for updated documentation, visit https://www.microfocus.com/support-and-services/documentation/.

Support

Visit the MySupport portal to access contact information and details about the products, services, and support that OpenText offers.

This portal also provides customer self-solve capabilities. It gives you a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the MySupport portal to:

- View information about all services that Support offers
- Submit and track service requests
- Contact customer support
- Search for knowledge documents of interest
- View software vulnerability alerts
- Enter into discussions with other software customers
- Download software patches
- Manage software licenses, downloads, and support contracts

Many areas of the portal require you to sign in. If you need an account, you can create one when prompted to sign in.

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Content Manager Release Notes

Introduction to Content Manager 23.3

OpenText 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, Content Manager enables organizations to lower operating costs, secure information, enhance compliance, and increase productivity.

Content Manager 23.3 focuses on Microsoft 365 integration capabilities, life cycle management features, and SDK improvements.

Content Manager 23.3 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 first patch release of the Content Manager 23.3 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) and English (US).

This release uses a new versioning that is compliant with OpenText product naming convention. It uses a Year.Quarter format, for example, for the first quarter of 2024, the versioning would be 24.1. Please refer to the Lifecycle policy to view the Committed Support dates for this release.

The new and enhanced features described in the following sections fall under the **User Experience** theme.

For technical details, including the support matrix, refer to **CM23.3_Spec.pdf** and **CM23.3_ Install.pdf**.

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

https://kmviewer.saas.microfocus.com/#/PH_215044

Customers who have developed SDK applications or add-ins should refer to the SDK release notice for relevant changes and plan their upgrade accordingly. The SDK Release Notes for this release can be found at https://content-manager-sdk.github.io/Community/

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 **23.3** 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.

New Install and Upgrade Considerations

IMPORTANT: When you install Content Manager for the first time or you upgrade from previous version and you encounter security issues, then refer to *Security considerations* section in **CM23.3_Spec.pdf**.

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 TLS 1.0 and TLS 1.1

Support for TLS 1.0 and TLS 1.1 is discontinued for security reasons for upgrade or new installation of Content Manager.

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.

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**.

SDK

HP.HPTRIM.SDK.dll is deprecated

The HP.HPTRIM.SDK.dll is deprecated in Content Manager and the SDK applications now use TRIM.SDK.dll instead.

API TRIM.SDK.Database.ConnectAs(System.String, System.String) is deprecated

The SDK API, **TRIM.SDK.Database.ConnectAs(System.String, System.String)** used for authentication is deprecated from this release.

A new API, **TRIM.SDK.Database.SetAuthenticationCredentials(string userName, string password)** is introduced.

This API provides credentials for use with the specified Authentication method. May be used with the ExplicitWindows and OpenId authentication methods. When used with OpenId authentication, this method allows non-interactive applications to authenticate using OpenID Connect confidential clients, configured in Content Manager Enterprise Studio. To authenticate using an OpenID Connect confidential client, Database.TrustedUser must be set, and the Client ID and Client Secret of the confidential client must be passed in as 'userName' and 'password', respectively.

Manage in Place (MiP) file system

In Content Manager 10.1, the MiP file system stores could be created without specifying a root folder. This was changed in Content Manager 23.3 and the root folder setting is now required.

Existing Manage in Place stores from previous version of Content Manager, say 10.1, are still supported and will continue to function, even without a root folder setting. However, any new Manage in Place stores created in the Content Manager 23.3 onwards, will require a root folder.

Web Client

webToMobileRedirection attribute

The **webToMobileRedirection** attribute has been deprecated. If you are upgrading from previous version of Content Manager to 23.3 or later, and the attribute is present in your **hprmServiceAPI.config** configuration file, make sure to remove it.

SharePoint

Render configuration wizard help

To get the configuration wizard help files to render properly, install the Microsoft WebView2 Runtime. You can download from the following location: Microsoft WebView2 Runtime.

Content Manager Help

Browser based HTML help

The help for Content Manager client, Enterprise Studio, Dataport, and Office integration is in HTML format (for US and International English) and opens in the browser. The image scanner help still remains in CHM format.

Currently, the HTML format of Content Manager client help includes help only for the Content Manager client as compared previously to CHM help that included help for Enterprise studio, Dataport, and Office integration. Also, Ourown.chm is not supported due to change in help file format.

The localized help for Content Manager client, Enterprise Studio, Dataport, and Office integration are still in CHM format.

The HTML help files will be hosted on the Documentation Portal along with the PDF documents.

Re-indexing records

If you have Record titles or notes having dots (.) and leading zeros, after you upgrade to 23.3, you need to re-index the Records.

Viewing Check In Style in EmailLink

To view Check In Style in EmailLink after upgrading Content Manager to the latest version, you need to update **trimlink.hptrim.config** file. Perform the following:

1. Navigate to the installation folder, for example, C:\Program Files\Micro Focus\Content Manager\EmailLink and open the **trimlink.hptrim.config.template** and **trimlink.hptrim.config** files in a text editor.

2. Copy the following code snippet available in **trimlink.hptrim.config.template** file and paste it in **trimlink.hptrim.config** file.

```
<add name="MailLinks" model="FormSearch" trimType="CheckinPlace"
template="ExchangeUsers"
properties="CheckinPlaceName,CheckinPlaceOwner,CheckinPlaceCheckinAs,DateLastUp
dated,CheckinPlaceSyncState"
q="type:MailForServerProcessing,SocialMediaForServerProcessing,ChannelDocsForSe
rverProcessing,ChannelPostsForServerProcessing,TeamsChatForServerProcessing,Doc
sForServerProcessing" sortBy="cipOwner" pageSize="30"/>
```

3. Save the config files and close the text editor.
4. Restart both the EmailLink services.

Clear browser cache for Microsoft 365 integration

After you upgrade to Content Manager 23.3, it is recommended to clear browser cache for Microsoft 365 integrations features, like ZFP and Teams, to work properly.

Installing new dataset or upgrading a dataset for Azure SQL

By default, with MS SQL server, Content Manager will filter Noise words from text word search query, if **transform noise words** is not set at the database server level. In this scenario, installing new Azure SQL dataset or upgrading Azure SQL dataset may fail. So, by setting the **transform noise words** in your MS SQL database server, noise word filtering can be passed to the database server.

To set the **transform noise words**, see https://learn.microsoft.com/en-us/sql/database-engine/configure-windows/transform-noise-words-server-configuration-option?view=sql-server-ver16

Behavioral change for Microsoft 365 integrations

Zero Foot Print (ZFP) Office integration

The Contributor user can no longer create a new record. If you are a Contributor, you will get an error when you attempt to Check In a document.

Zero Foot Print (ZFP) Office integration - Excel

Revision is incremented when checking in Excel document - When you click **Check In** from the Content Manager ribbon in MS Excel, system will check the MS Excel document into Content Manager and increase the revision number of the record whether the spreadsheet has been updated or not since its last check-in.

MS Teams integration

- **Client side manual filing** - In the previous version of Content Manager, if Server side filing is enabled for channel, then user was not allowed to file manually (Client side). However, in 23.3,

for channels, sites, and My files page, even if Server side filing is enabled, user is allowed to file manually.

New Features

Rebranding

For this release, Content Manager is rebranded to Stage 1 requirements of OpenText. The following changes are implemented:

- All company name references have been changed to OpenText.
- Micro Focus logo is replaced with OpenText logo.
- Full copyright or legal notice follows OpenText guidelines.
- Screens, installers, About pages, Favicons, branded loaders, and documentation (includes both PDF documents and help files) are rebranded.

Platform Continuance

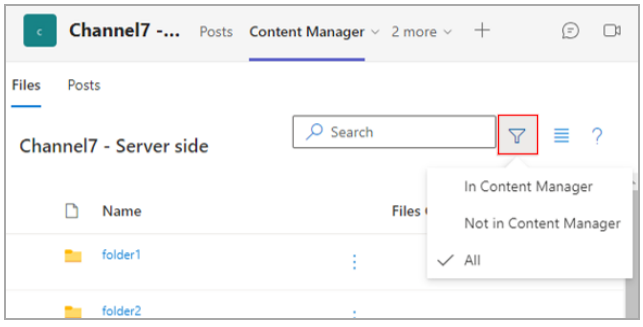
Content Manager 23.3 introduces support for:

- IDOL and Media Server 23.2
- KeyView 23.2 P1 Hotfix (23.2.1.8531)

Content Manager Microsoft Teams Integration

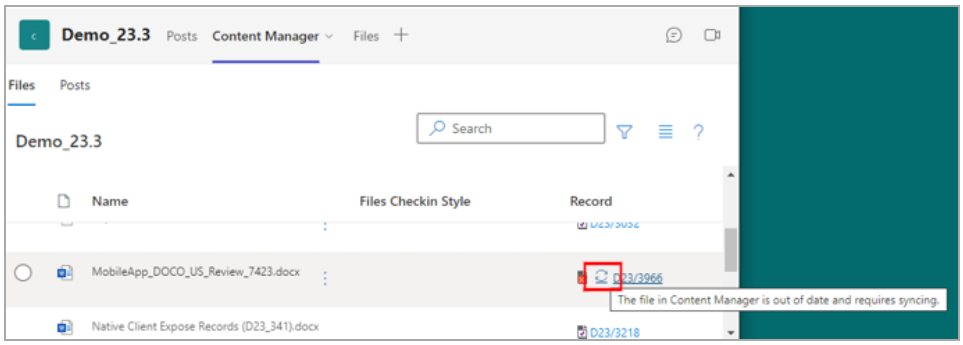
Filtering content

With this new option to filter content, you can display content that is filed only in Content Manager, not in Content Manager, or all content.



Syncing files

A sync icon appears for the manually checked in records (next to the record number), if a previously Checked In file has modifications that have not yet been Checked In. This icon warns the user that the Checked In copy of the file is not up to date. If the user checks in the file again, then a new revision of the file is created that reflects the modifications.



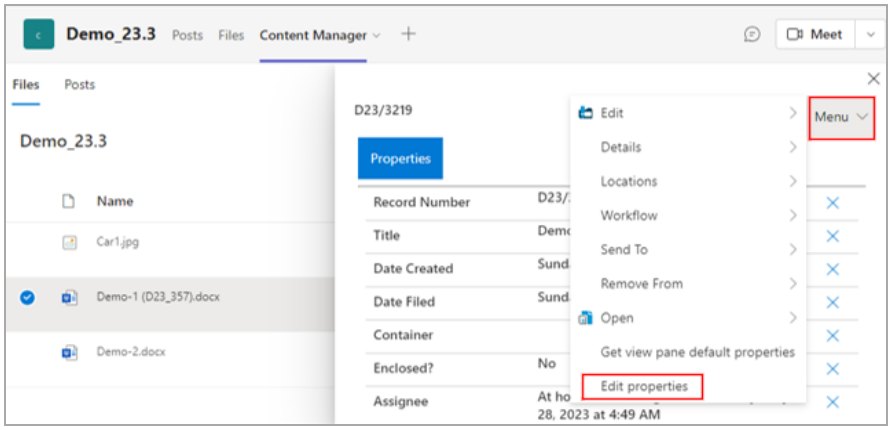
If you hover the mouse over the icon, a message appears indicating that the file or electronic document is out of date and requires syncing.

> **NOTE:** The sync functionality works with Office 365 files or documents only. If the file or document is created in any other source than Office 365, the sync functionality does not work.

> **NOTE:** The sync icon is displayed for records that are captured in Content Manager document store and not for the records that are Managed In Place store. The Managed In Place store records are automatically synced with a scheduled scanner.

Editing record properties

A new option **Edit properties** is available in the **Properties** tab menu options that allows you to edit the record properties.

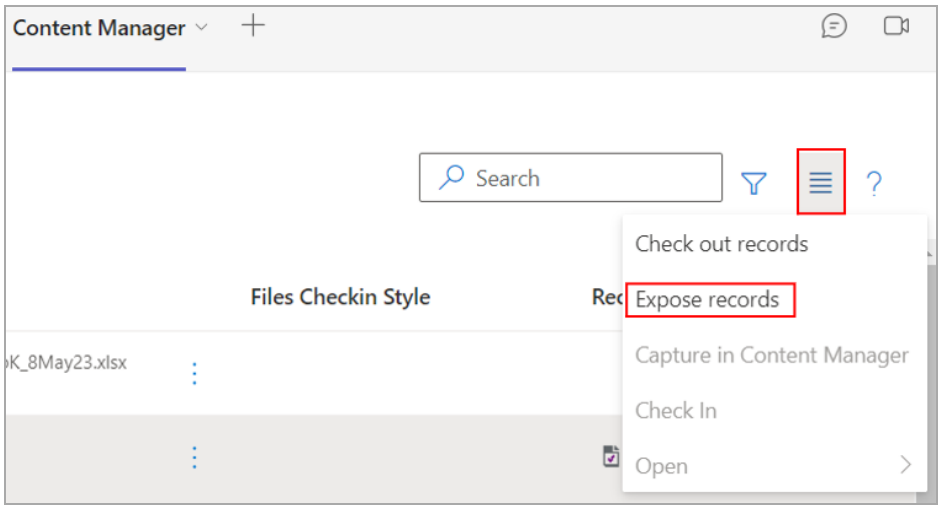


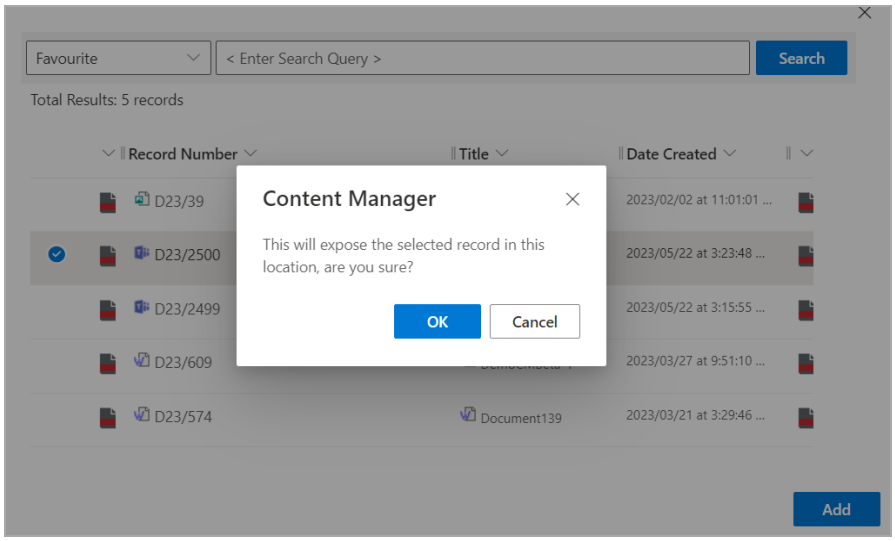
Exposing records

You can expose or add the Checked In records in Content Manager to a channel in MS Teams.

Navigate to the required channel, click menu (top right), and then click **Expose records**. The list of records is displayed. Select the record(s) you want to expose in the channel and click **Add**. A confirmation dialog is displayed, click **OK**.

If the record is already exposed, a pop up message is displayed that the record is already checked out to the channel and option to select the record is disabled.

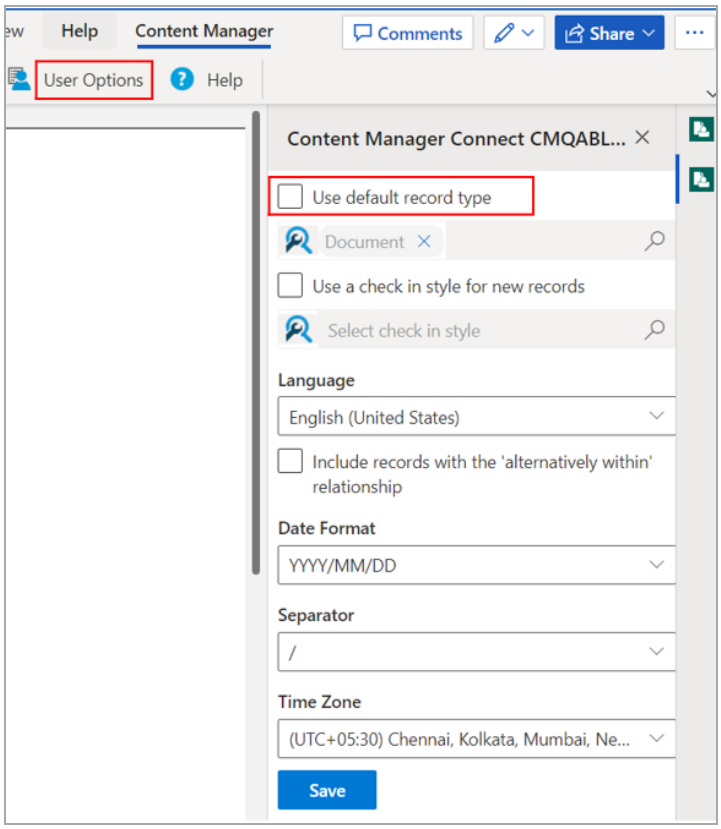




Content Manager Zero Foot Print (ZFP) Office/Outlook

Ability to set default Record Type for Email

The **User Options** in ZFP Outlook integration is enhanced with new option for setting default Record Type for your email messages. If you have set defaults for both Check In Style and Record Type, then Record Type is preferred.



Ability to attach Content Manager record

In the Content Manager ZFP Outlook integration, you can now attach Content Manager record when you compose a new email.

Shared mailbox and delegations

In the Content Manager ZFP Outlook integration, you can Check In mail(s) from a shared mailbox to Content Manager using linked folders. Mail(s) in shared mailbox can also be checked in using Record Type / Check In Style following the normal Check In process.

> **NOTE:** Make sure to create a Location in Content Manager and set the Email ID of the shared mailbox for the Location. Also make sure to add other users of the shared mailbox as Associations > Has Delegates in Content Manager. See *Content Manager Help* for more details.

If the shared mailbox is configured to Check In sent items, then all mails sent from a user's shared mailbox get checked into Content Manager using the linked folder for shared mailbox.

You can attach records and record meta data while composing a new mail from a shared mailbox. You can create linked folders and Check In Styles for the shared mailbox. You can set default Check In Style or Record Type in the User Options for the shared mailbox.

Suppose a user is Out Of Office or not able to access mailbox, then the delegated user can operate on the linked folder, such as Check In email(s), create linked folders, attach records to email and so on. The delegated user can Check In emails from Inbox using Record Type / Check In Style.

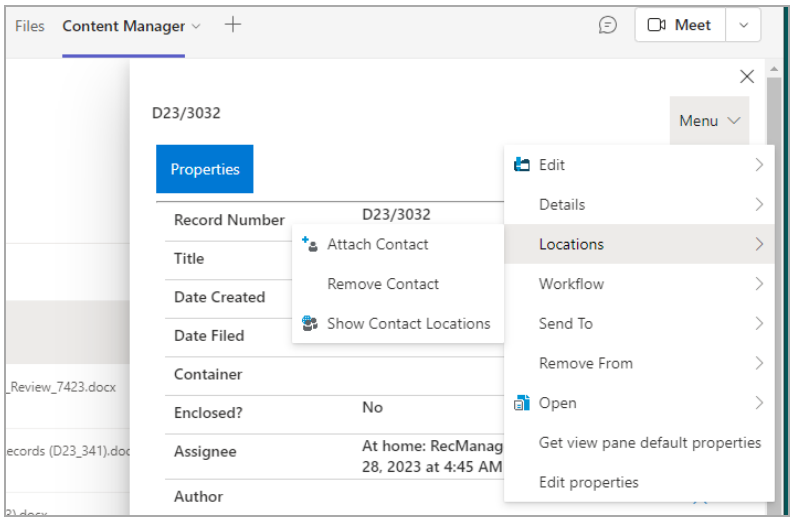
Ability to set default Check In Style for a record

In the Content Manager ZFP Office integration, you can set default Check In Style for checking in records.

Content Manager MS Teams and ZFP Office/Outlook Integrations

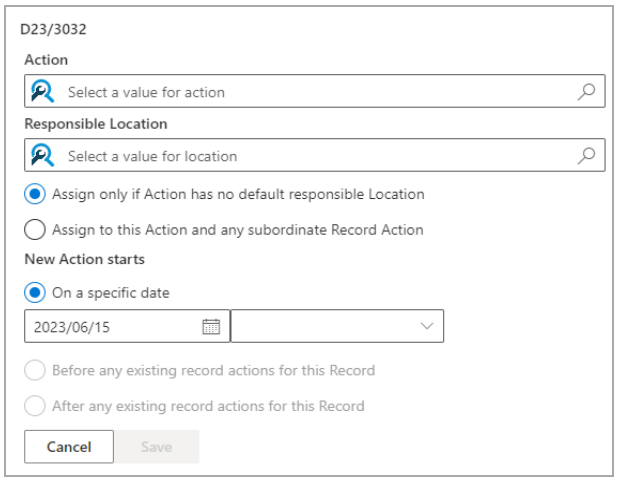
Ability to add or remove contact(s) to a record

The **Attach Contact**, **Remove Contact**, and **Show Contact** are the new options available to add or remove a contact(s) to a record. The **Show Contact** for a record, displays the list of contact(s) attached to the record. From the displayed list of contact(s) on a record, you can also delete a contact associated with the record.



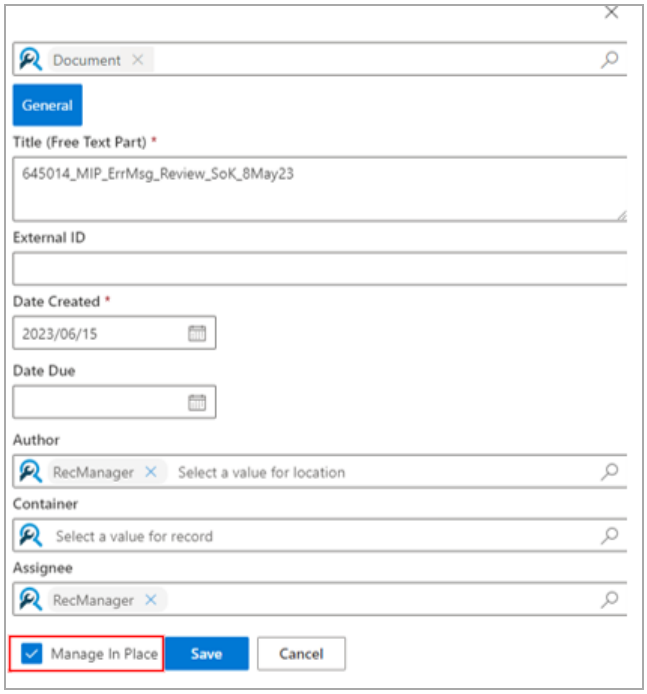
Action tracking for a record

You can use Action tracking to trace the flow of records and the tasks required to be performed on them within your organization. You can assign a single task (Action) or a sequence of tasks (Procedure) to a record.



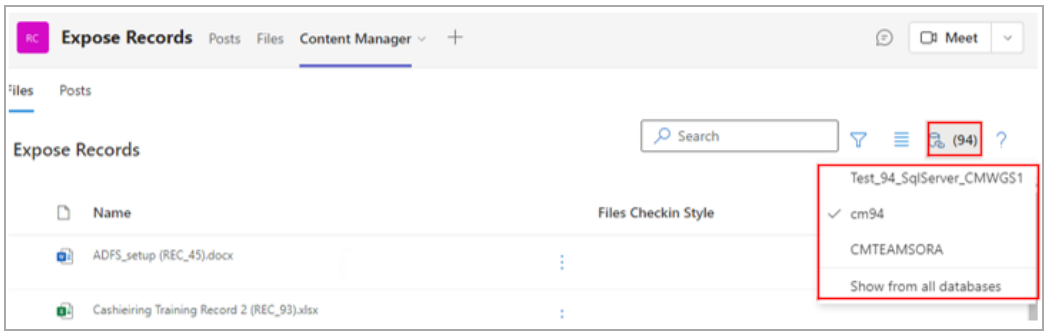
Supports Manage In Place stores

You can capture documents or files from MS Teams or Outlook to a Manage In Place store. Only Microsoft 365 stores are supported. Channel posts and user chats continue to be captured to Content Manager document store.

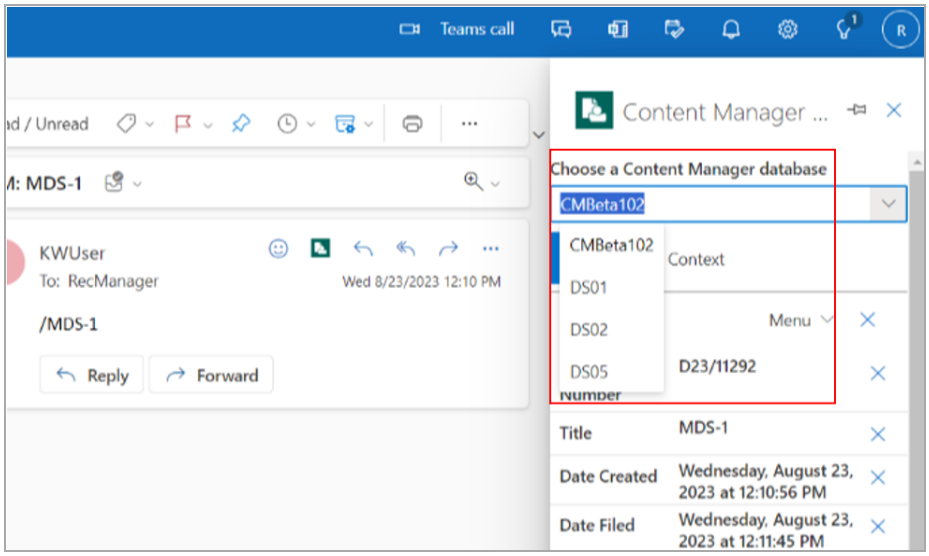


Supports multiple datasets

The Content Manager Microsoft Teams and ZFP integrations include an option to access multiple datasets. This requires additional configurations in tenant, IIS, and config.js. You can switch between datasets and check which datasets the records are Checked In to.



Managing multiple datasets in the teams integration



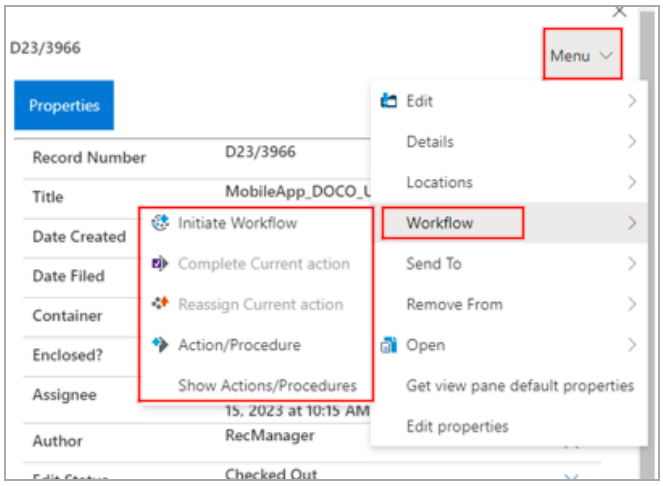
Managing multiple datasets in the outlook integration

Ability to initiate Workflows

The Content Manager Microsoft Teams and ZFP integrations support the ability to initiate Workflows.

You can initiate Workflows based on existing Workflow Templates and take action on Workflow Activities.

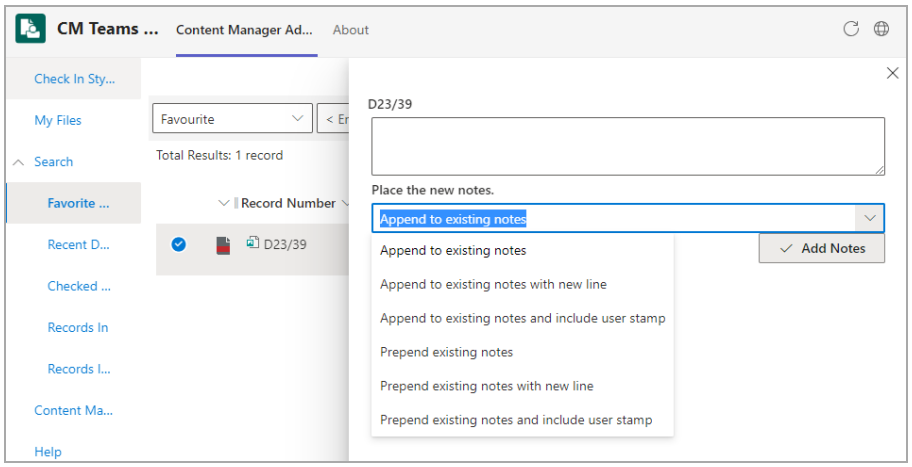
You can **Initiate a Workflow**, **Complete current action**, or **Reassign current action**. You can assign an action or a procedure to a location and view the list of actions or procedures for a location.



Ability to add Notes

You can add notes to a record in **Record Properties**. You can attach **User Stamp** to add the day, date, time, and username to your notes.

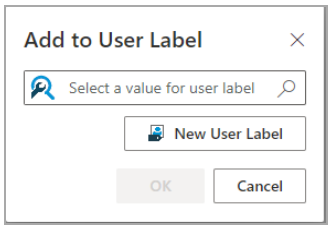
If you have **Modify Records** permission, you can add new notes or edit the existing notes. You can also choose where you want to place your notes - **Append to existing notes**, **Append to existing notes with new line**, **Append to existing notes and include user stamp**, **Prepend existing notes**, **Prepend to existing notes with new line**, and **Prepend to existing notes and include user stamp**.



If you do not have **Modify Records** permission, you can append your notes to the existing notes with user stamp.

Add User Labels to a record

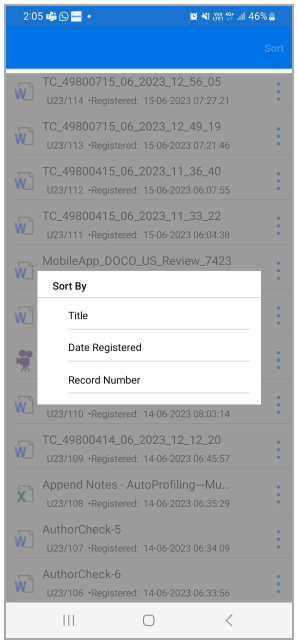
The Content Manager Microsoft Teams and ZFP integrations include an option to assign a user label to the record or you can create a user label and assign it to the record.



Content Manager Mobile App

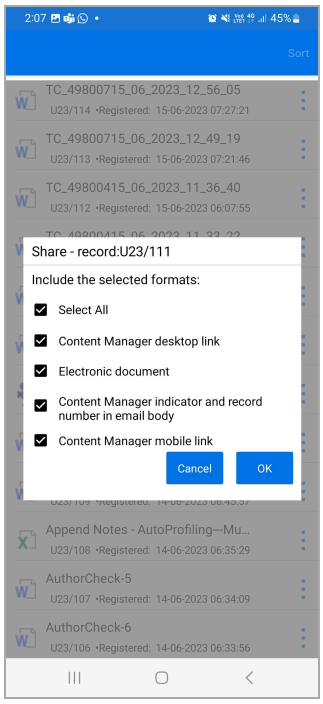
Sorting record list

You can sort the record list by - **Title**, **Date Registered**, or **Record Number**. In the record list, click **Sort** (top right). The **Sort By** pop-up is displayed. Click once on one of the Sort By options to sort the record list in ascending order and clicking again on the same option sorts the record list in descending order.



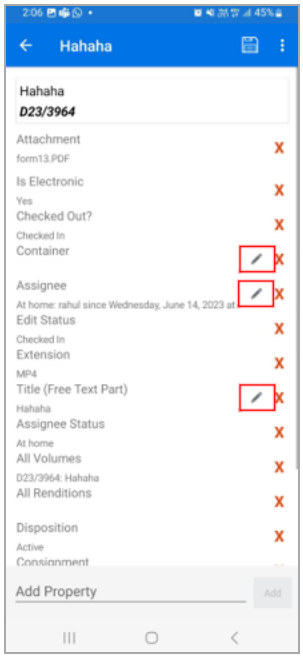
Sharing record metadata

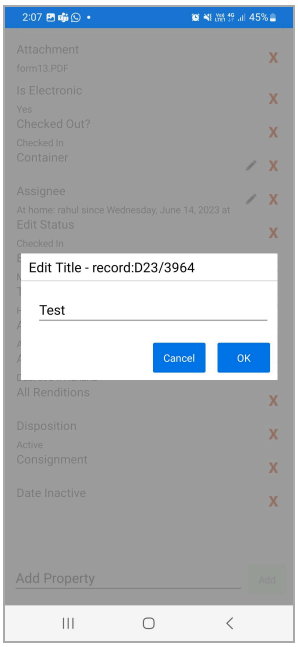
You can share record number, title, desktop link, and mobile link for the record. Click menu option of the record and select **Share**. A pop up with following options are displayed: **Select All**, **Content Manager desktop link**, **Electronic document** (if available with the record), **Content Manager indicator and record number in email body**, and **Content Manager mobile link**. Choose the required options to share the metadata details via email.



Modifying record metadata

The record properties that you can edit are **Title**, **Assignee**, and **Container**. Users with appropriate permissions can edit the record properties. Click menu option of the record you want to edit the properties and select **Properties**. The record properties are displayed. Navigate to **Title**, **Assignee**, or **Container** and click **Edit**. Update the metadata and save your changes.





Accessing Mobile App on tablets

You can now access Content Manager Mobile App on your tablet and iPad.

Supports Mobile Device Management (MDM)

Content Manager Mobile App supports Mobile Device Management solutions where your organization can have a centralized plan for managing multiple device types operating on different Operating Systems. With this configured, you can control who can access the Mobile App or what features they can access on the Mobile App.

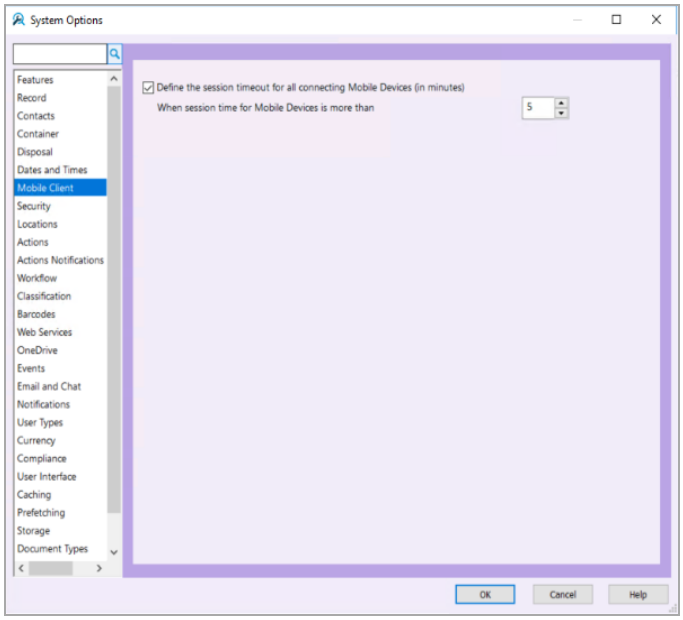
You can manage the following Content Manager Mobile App functions using MDM:

- ServiceApiUrl
- CanDownload
- CanShare
- CanEditServiceApiUrl

Setting Session timeout

In Content Manager client you can set a session timeout for all connecting mobile devices. The minimum period is 1 minute and the maximum can go upto 720 minutes. The default is 5 minutes.

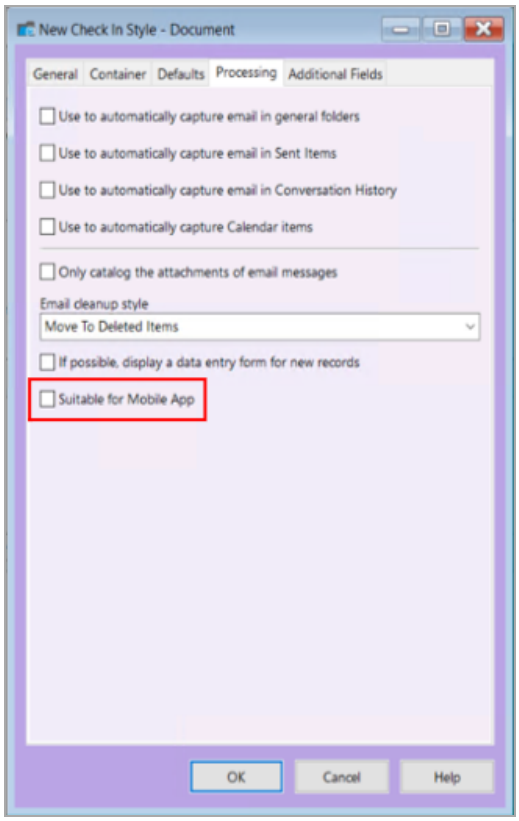
To set the session timeout, in Content Manager client, navigate to **Administration > System Options > Mobile Client**.



NOTE: Mobile App will not clear the authentication session cookies when the session has been timed out.

Leveraging Check-in Style for Mobile App

The Check In Styles created in the Content Manager client can be made available in the Mobile App. For the Check In Styles to be available in Mobile App, enable the option **Cell App** in the Content Manager client **System Options > Features tab** and when you create a Check In Style in the Content Manager client, the option **Suitable for Mobile App** should be enabled in the **Processing** tab.

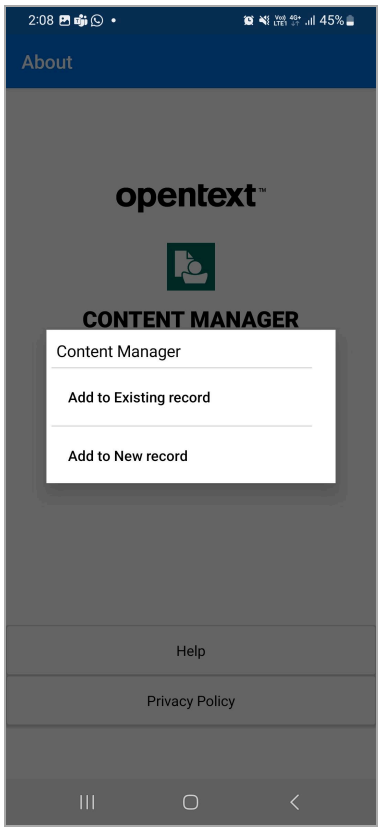


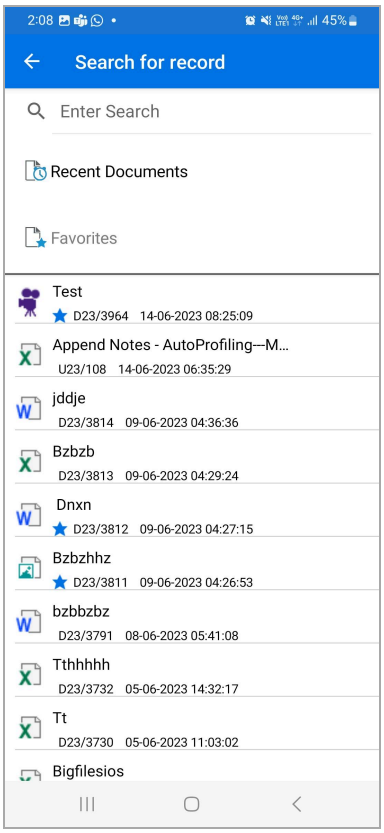
Attaching electronic document to a new record or to an existing record

Using the Share functionality of your mobile, you can attach the document to a new record or to an existing record. In Android, you can share files, videos and photos from My Files, Gallery, or Photos. In iOS, you can only share from Files.

Select a file, photo, or a video on your mobile and select the Share functionality. Select and log in to the Content Manager Mobile App. A pop up with **Add to existing record** and **Add to new record** options is displayed.

Choose **Add to existing record** option to attach to an existing record. You can attach to only those records that are available in the result list of **Recent Documents**, **Favorites**, and **Search** menu items. Or choose **Add to new record** to create a new record with the attachment.

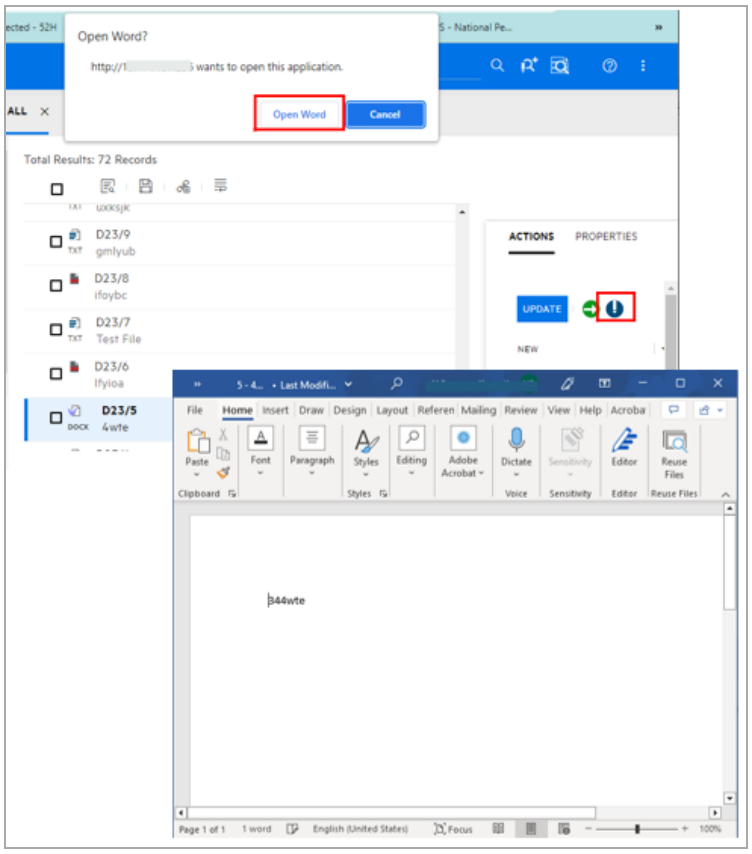




Content Manager Web Client

WebDav to CheckOut and edit

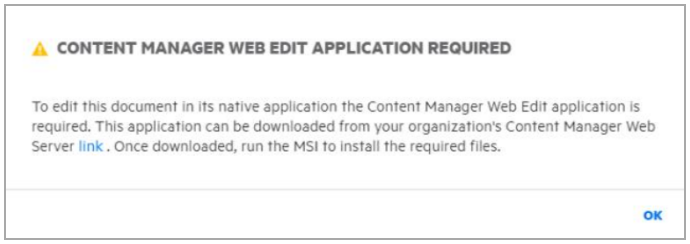
You can access Content Manager Web Client via a supported version of **Chrome**, **Microsoft Edge**, and **Firefox**, to check out an electronic document and edit it directly in its authoring application.



Configuring non-Office documents

You need to run **CM_WebClient_WebDAVedit.msi** to configure WebDav for non-Office documents. To download the current version of the .msi, make sure that **enableWebDAVEdit** attribute is set to **true** in **hprmServiceAPI.config** file.

If the **enableWebDAVEdit** attribute is set to **true** in **hprmServiceAPI.config** and you click on WebDav icon for non-Office documents, then a message is displayed with a link to download the **CM_WebClient_WebDAVedit.msi**. Run the **CM_WebClient_WebDAVedit.msi** to install WebDav for non-Office documents.



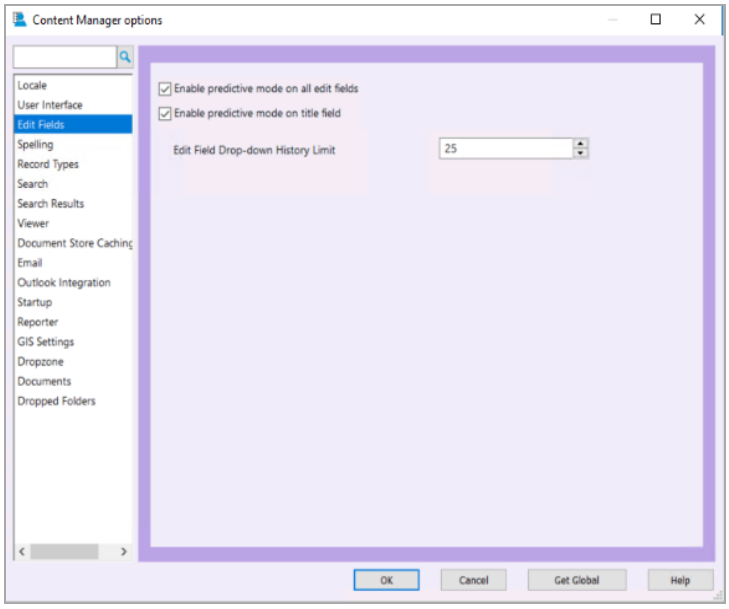
If you have upgraded from a previous version of Content Manager, clicking on the WebDav icon for non-Office documents will display a message that a new version of the MSI is available and you must install the latest MSI to continue. Click **OK** to download the latest MSI and run it to install it.

See, *Appendix A Configuring WebDav* section in **CM23.3_WebClient.pdf.**

Content Manager Client

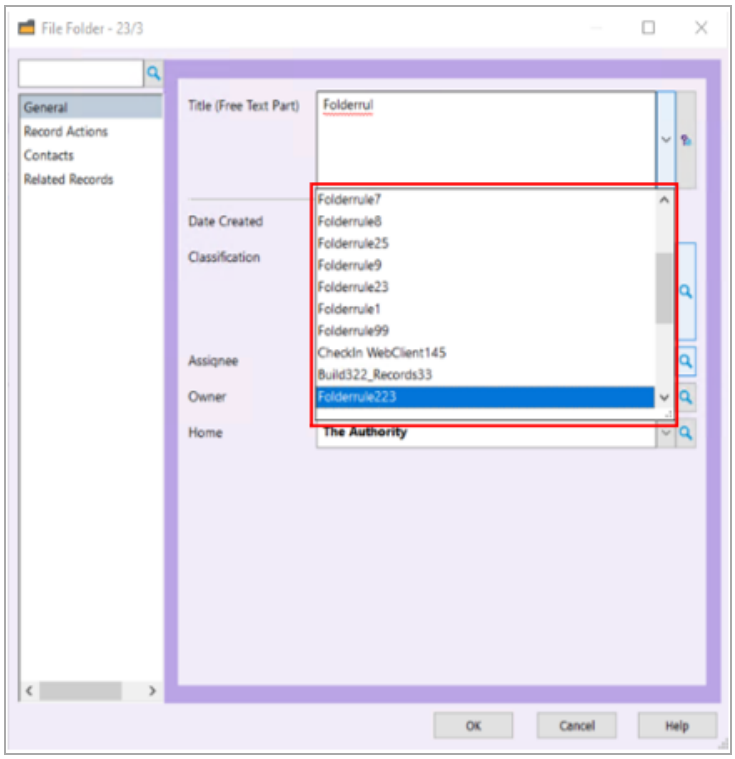
Predictive mode and drop-down history

The new option **Edit Fields** in **User options** enables you to set predictive mode as well as determine the drop-down history limit.



Setting the predictive mode allows Content Manager to suggest text based on the first letter(s) typed in the field.

The **Edit Field Drop-down History Limit** allows you to set the limit for edit history items. The default value is 25.



Copy or overwrite notes for deleted Locations

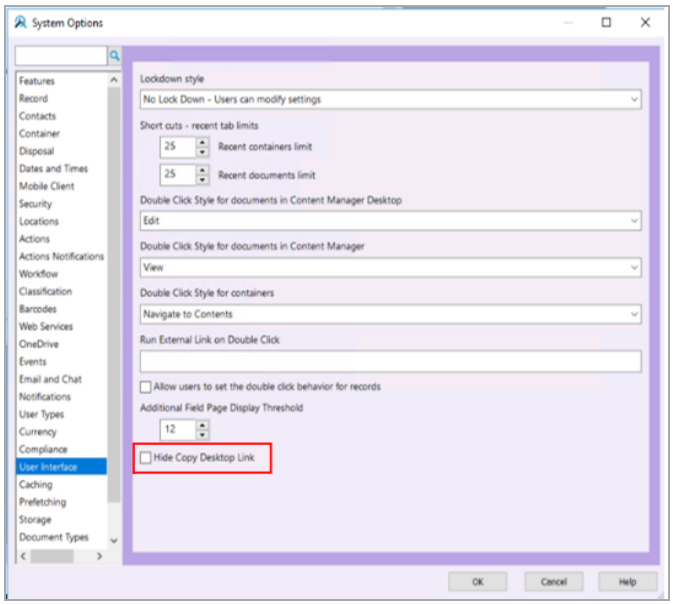
If the location you are deleting has any notes, you can either copy them to the replacement location or overwrite the notes in the replacement location with the notes of the deleted location.

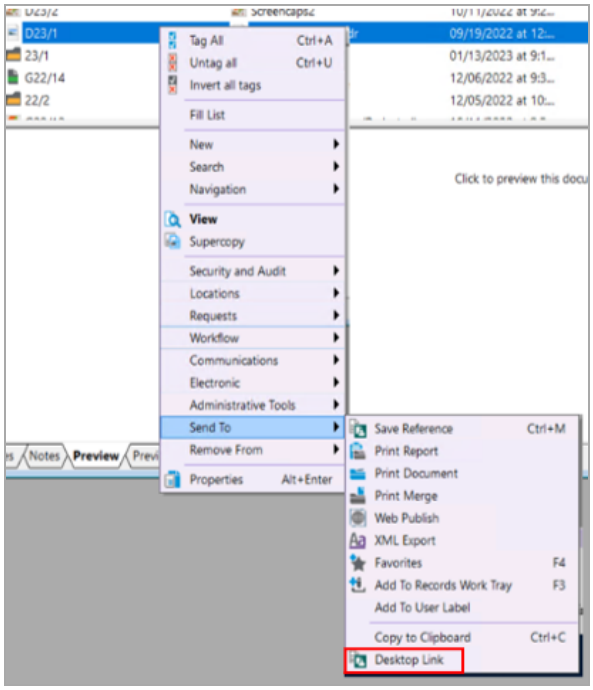
Offline records deletion

All the records or draft documents that are deleted from the Offline Records tray will be added to the Windows Recycle Bin.

Hide the copy desktop link

The Content Manager **System Options > System Options User Interface** is enhanced with a new option to **Hide Copy Desktop Link**. Checking this option hides the **Desktop Link** option from the **Record Shortcut** menu.

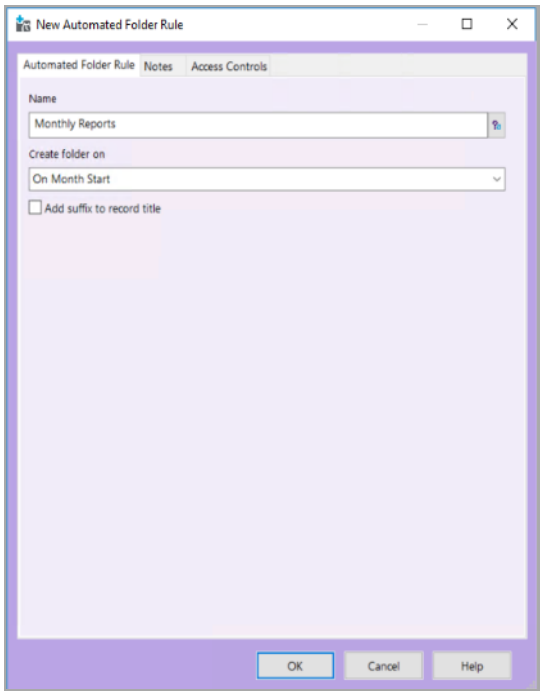




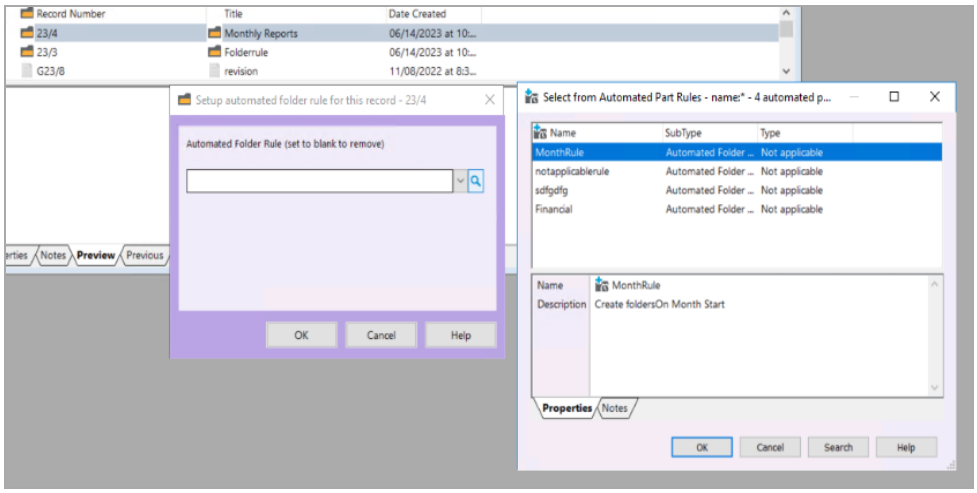
Creating and setting an automated folder rule

Content Manager enables you to create and set an automated folder rule for container objects that have the **Part Numbering - Record Type does not allow New Parts to be created** option enabled.

You can create rule(s) for automatic creation of container(s) or folders based on month, year, or financial year.



For example, you may need folders to be created every month for the reports you generate. In this case, you can create a rule to automatically create a folder at the start of every month and set this rule on the folder, say **Monthly Reports**.

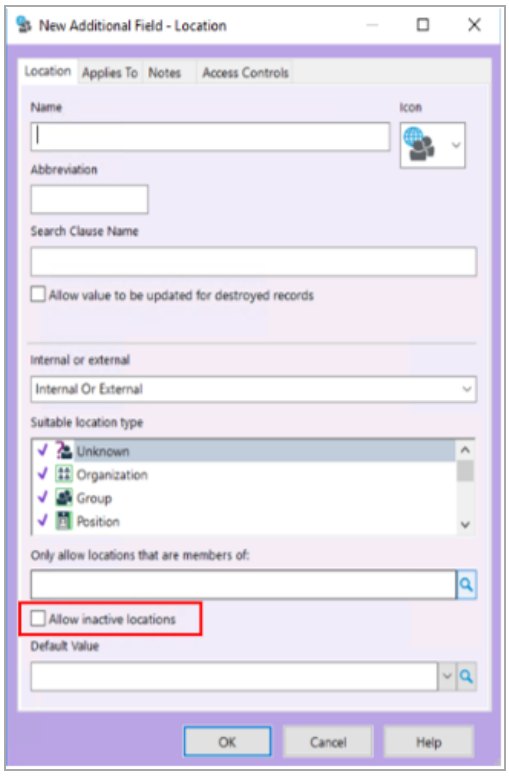


Mandatory note when moving records to the Recycle Bin

Content Manager **System Options > System Options Miscellaneous page** is enhanced with a new option, **Make an entry into notes mandatory on recycle**, to make adding an entry to record notes a mandatory option when moving the record to the Recycle Bin.

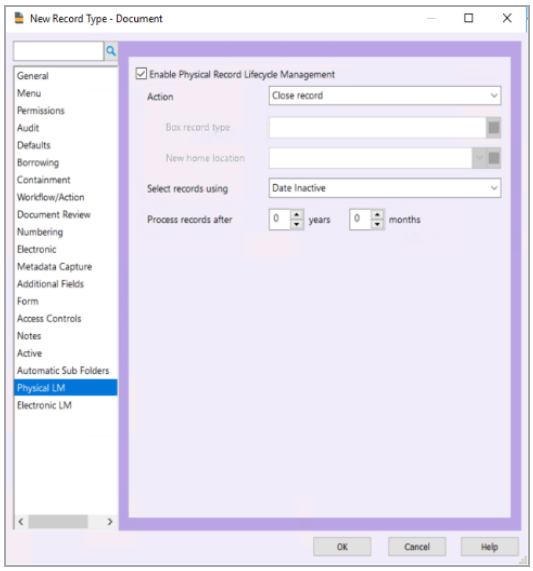
Support for Inactive locations in additional fields

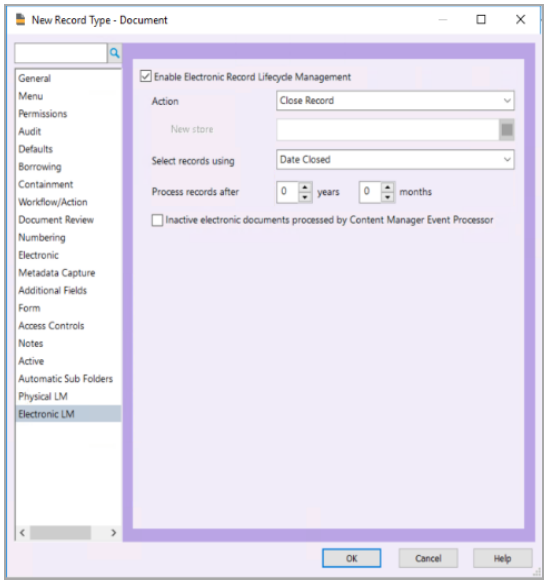
Content Manager supports the creation of Location additional fields with inactive locations.



Ability to Close Record using the Electronic or Physical Lifecycle Management

The Electronic and Physical Lifecycle Management for Record Type is enhanced with a new option to **Close Record**. Select this option to close records when you process inactive records.



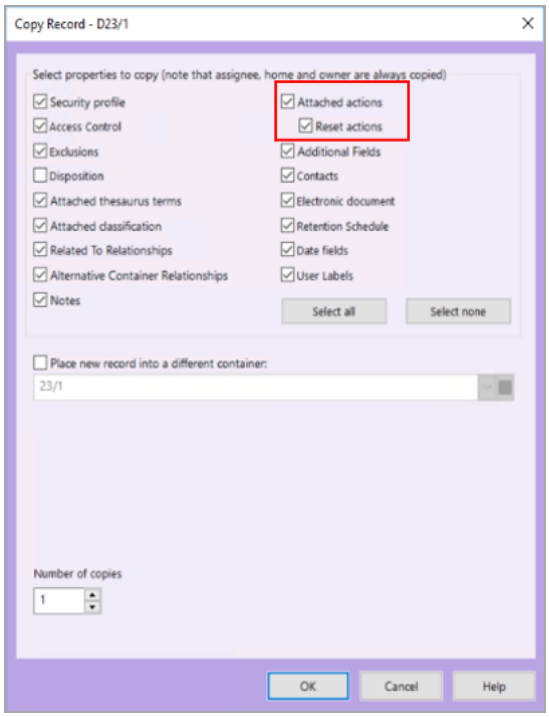


Filter records when creating a census

You can add a search criteria and filter records when you create a new census activity.

Reset actions when copying a record

Copying a record is enhanced with a new **Reset Action** option that allows you to update the Action dates to reflect the new date on the copied record. This option is enabled only when you select **Attached actions** option. By default, the **Reset Action** option is not enabled.



Adding External Links to the Ribbon Shortcuts

You can create an External Links ribbon button and then add it to the Ribbon and Quick Access toolbar.

Support drag and drop of locations on locations

You can drag a location onto another location. The **Add Association** and **Cancel** options are displayed. Click **Add Association** to define a relationship between the locations.

Allow records to inherit additional fields

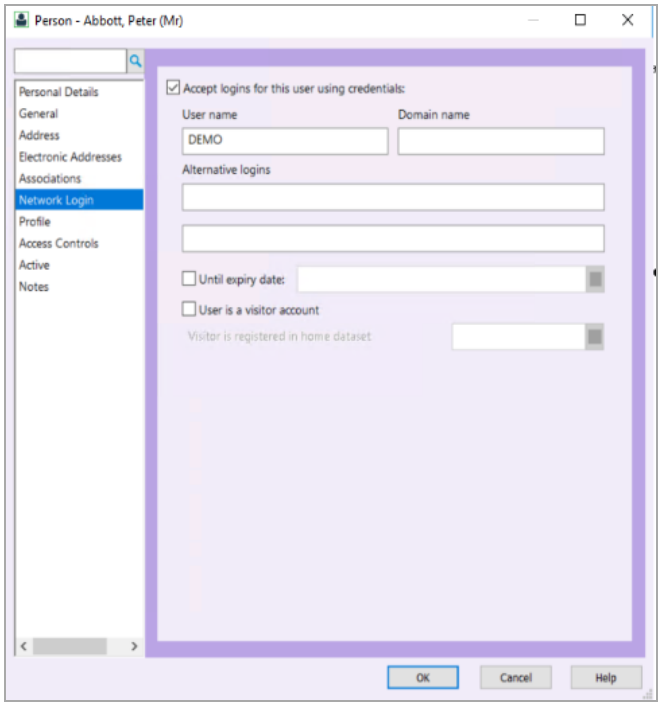
In Content Manager, a new system option, **Cascade additional fields values from container when creating new records**, has been added to the **System Options > System Options Container** tab. When enabled, this option will allow records to inherit additional fields from the container during the creation process.

Checking in documents checked out using third party tool (SDK)

Administrators can Check In documents from the shared location, if user has Checked Out the document using a third party tool and not checked it back in.

Alternative login field

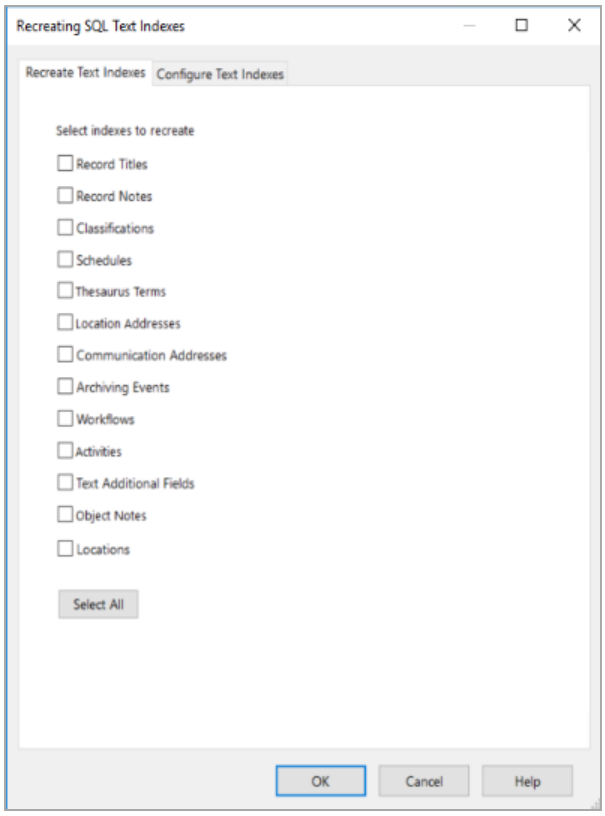
The **Network Login** tab of **Location** properties has been enhanced with new **Alternative Logins** option. This option should be used by trusted servers when using alternative authentication systems. When a Workgroup Server is presented with a Trusted User name, it will attempt to find the location profile based on either the normal login name or either of the alternative login names.



Content Manager Enterprise Studio

Recreate SQL text indexes

The Content Manager Enterprise Studio provides a new option to recreate SQL text indexes. You can recreate the indexes based on record title, record notes, classification, and so on. Select all the options or select the required options to recreate the indexes.



Ability to cancel long running processes

The Content Manager Enterprise Studio is enhanced with an option to cancel long running processes by Administrators. Right-click on the Workgroup Server and select **Show Running Queries**. The dialog displays list of queries currently running on the Workgroup Server. Queries can be canceled by selecting the relevant query, right-click, and then select **Cancel**. Click **Export** to export the data to a text file (.txt).

Improve performance of the SQL text re-indexing tool

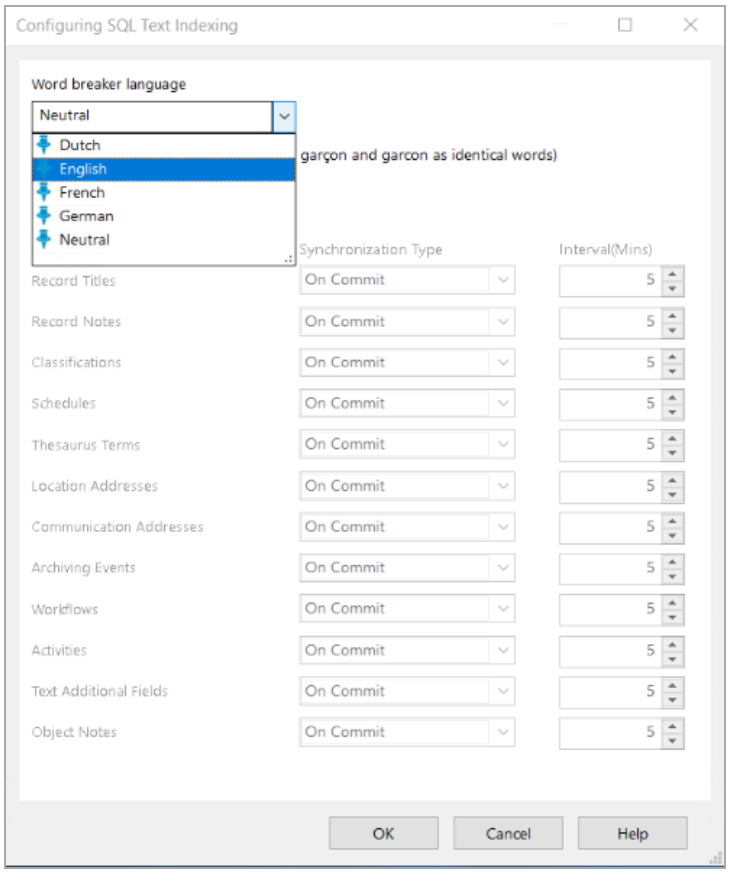
A new **Use single thread per word type** option is added to Reindexing the SQL Text Index tool to improve the performance. When enabled, the re-indexing process runs in parallel using a single thread per word type.

Elasticsearch integration improvements

A new parameter **Elasticsearch Document Overlap buffer (bytes)** is added to Content Manager Enterprise Studio for improving the search. This parameter is set fixed size buffer, measured in bytes that is duplicated in 2 consecutive child documents. It will try to split the text on a word boundary by searching for the first white-space character, but if this fails, it will split at the given byte value.

Ability to choose the Word breaker language

The SQL text indexing in he Content Manager Enterprise Studio is enhanced with an option to select the Word breaker language. Right-click on the dataset, select **SQL Text Indexing**, and click **Recreate**. The dialog displays the **word breaker language** option. By default it is set to **Neutral**. The available languages are **Dutch**, **English**, **French**, and **German**.



Content Manager SharePoint Governance and Compliance

Support for SharePoint Site User experience

The Content Manager Governance and Compliance for SharePoint app supports SharePoint Site User experience for Documents and Custom Lists in your site collection. A new template (**CMModernUIGovernanceComplianceTemplate.app**) is available in the install directory to support SharePoint Site User experience.

If you are integrating Content Manager with SharePoint for the first time, during app configuration using the Wizard or Tool, you have the option to choose the SharePoint Site User experience (**Classic or Modern**). Based on your selection, the respective template will be used to create the app.

If you want your existing integration to work with SharePoint Site User experience, in the App configuration settings you must modify the SharePoint Site User experience option to **Modern**. Using the Configuration Tool, configure the app, and publish it. Complete the rest of the necessary steps by adding the app to your site collection.

To know whether you are using the right template for the experience you chose, check the app title once you have added it to your site collection. For classic experience, the app title will be Content Manager Governance and Compliance app. For SharePoint Site User experience, the app title will be Content Manager Modern UI Governance and Compliance app.

With the SharePoint Site User experience, Content Manager options will be available on the horizontal navigation bar of your site pages for Documents and Custom Lists. Except for the title of the app, the menu options and its functions are same as the classic experience.

Manage in Place

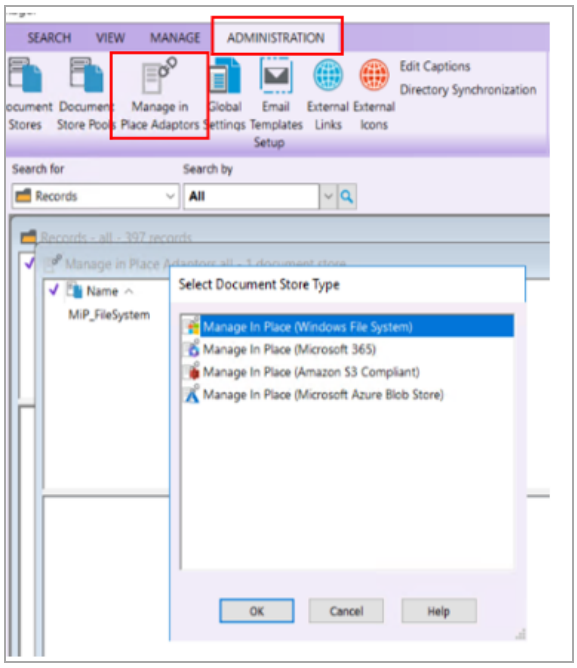
Adaptors

To support the Manage In Place feature, Content Manager introduces a new concept of **Manage in Place adaptors**, allowing Content Manager to interface with external storage systems.

Manage in Place adaptors encapsulate the necessary information , such as URL's and credentials, to allow Content Manager to access documents in an external storage system. **Manage in Place adaptors** are configured in the Content Manager client by going to **Administration > Manage in Place Adaptors**.

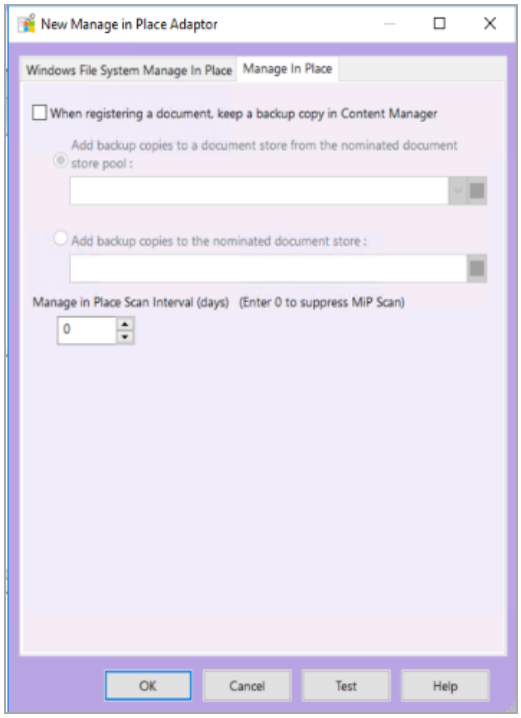
Content Manager supports the following new Manage in Place document store types:

- Windows File System
- Microsoft 365
- Amazon S3 Compliant
- Microsoft Azure Blob Store



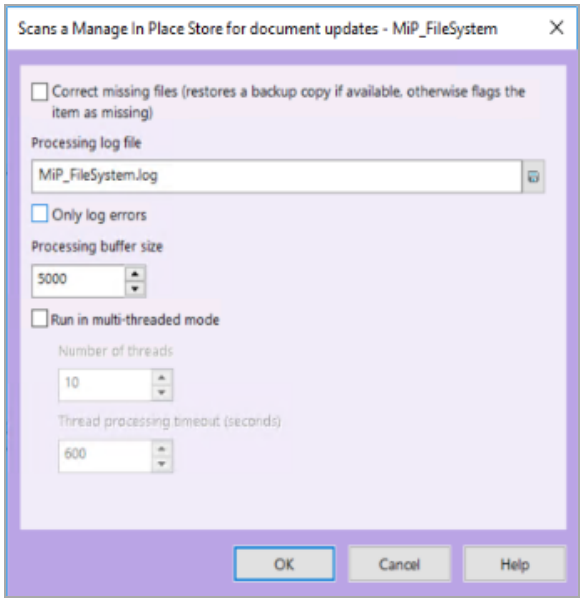
Backup of Manage in Place Content

You can keep a backup of the document you are managing in place either in the document store pool or document store of your choice. You can access this tab from either the Properties of a respective document store or when creating a new document store.



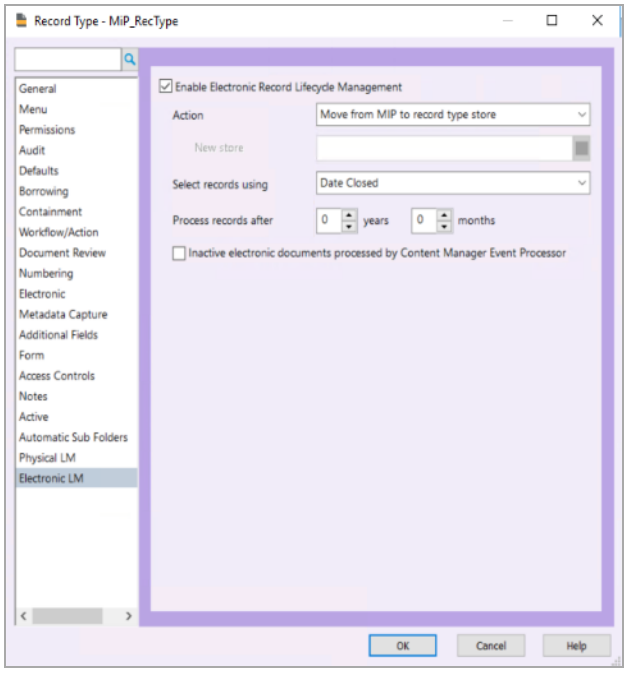
Scanning Manage In Place items for updates

If the store is taking backup of manage in place documents, it will check for document updates. Any updates will be backed up, and the older backup deleted. Right-click on the store you want to scan the items from and select **Scan Manage In Place Items**.



Moving Manage in Place records

The Electronic LM page of record properties includes a new **Move from MIP to record type store** option to move the Manage in Place records to the nominated document store of the record type. The **Edit Status** of the record changes from **Manage In Place** to **Checked In**.

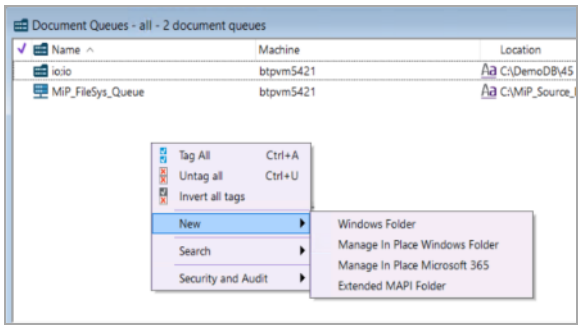


Ability to delete source document

A new option, **Delete document in source location (MIP Store)**, to delete documents in store folder has been added while transferring items to a different store.

Document queues support Manage in Place

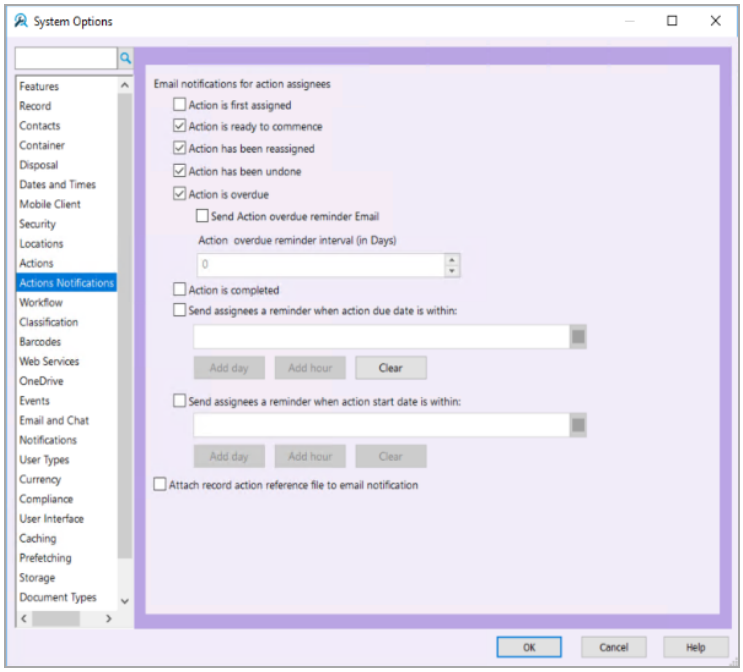
In Content Manager, you can set up document queues for **Manage in Place Windows Folder** and **Manage in Place Microsoft 365** stores.



Notifications

Email notifications for action assignees

The Content Manager **System Options** now enables you to set email notifications for action assignees. These notifications can be sent for various actions, such as, action first assigned, reassigned, undone, overdue, complete and so on.



Enhanced email notification for Workflow activity

Content Manager Workflow is enhanced with an option,**When notes modified** in **Workflow Activity Options**. When this option is enabled, you will receive email notification if the notes are updated or added for an activity in the Workflow.

Alert notifications for Holds

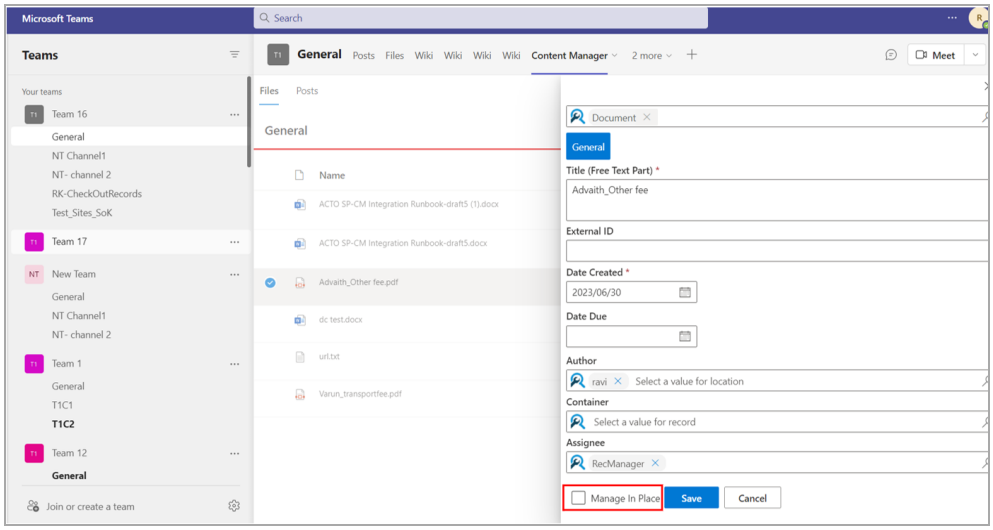
You can create Alert notifications for Holds when records are added to or deleted from Holds.

Enhanced Features

Content Manager Microsoft Teams Integration

Capturing content

Content captured from teams can now be either checked in to a Content Manager document store, or can be Managed in Place. For client-side filing, the Manage in Place option occurs when **Manage in Place** is selected next to the **Save** button when checking a document in.

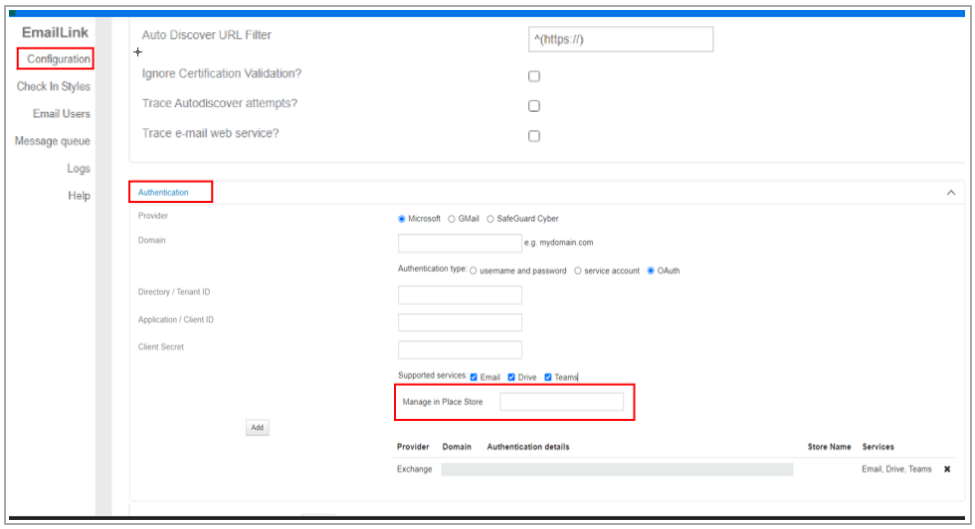


When filing channel post(s) or user chat(s) containing document(s), if Manage In Place store is not configured, then the **Manage in Place** check box does not appear. The document(s) will be stored in Content Manager document store and the Edit Status will be **Checked Out**. And if Manage In Place store is configured, then the **Manage in Place** check box appears, and if selected the document(s) will be stored in OneDrive and the Edit Status will be **Managed In Place**.

For Server side filing of documents, configuration of the document store in EmailLink determines whether files will be Managed in Place or checked in to Content Manager document store. In the EmailLink, navigate to **Configuration > Authentication** tab, perform one of the following:

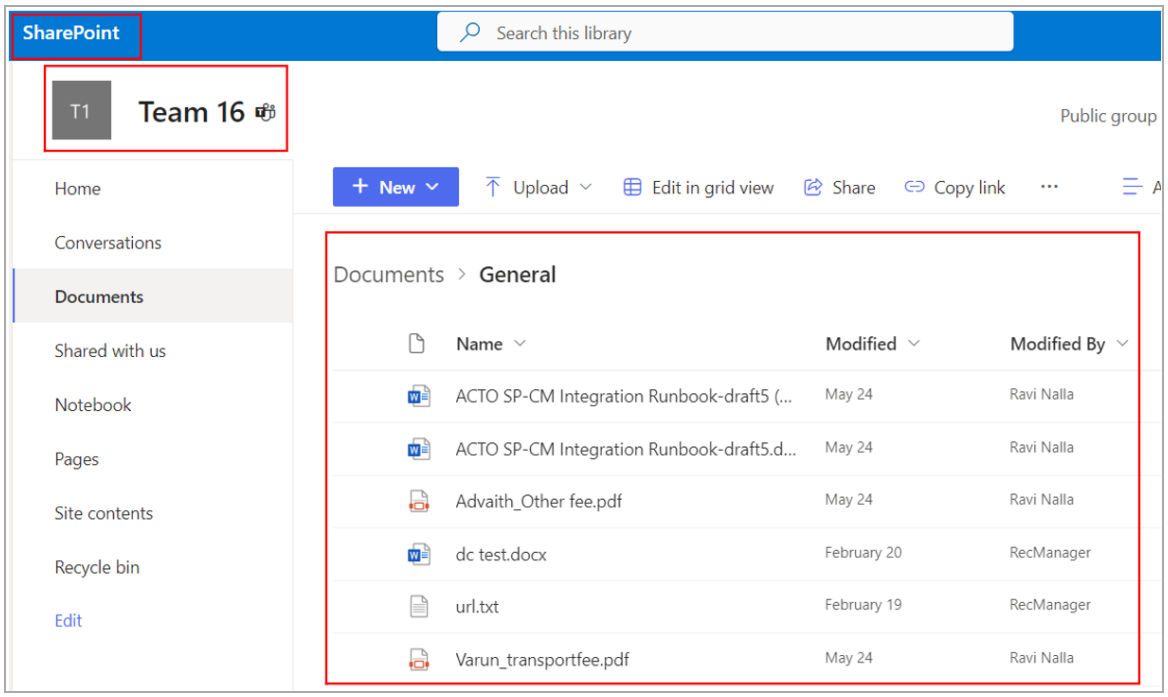
- Leave the **Manage in Place Store** option blank for filing documents to Content Manager document store
- Enter the store name in **Manage in Place Store** option for filing documents to Manage in Place store.

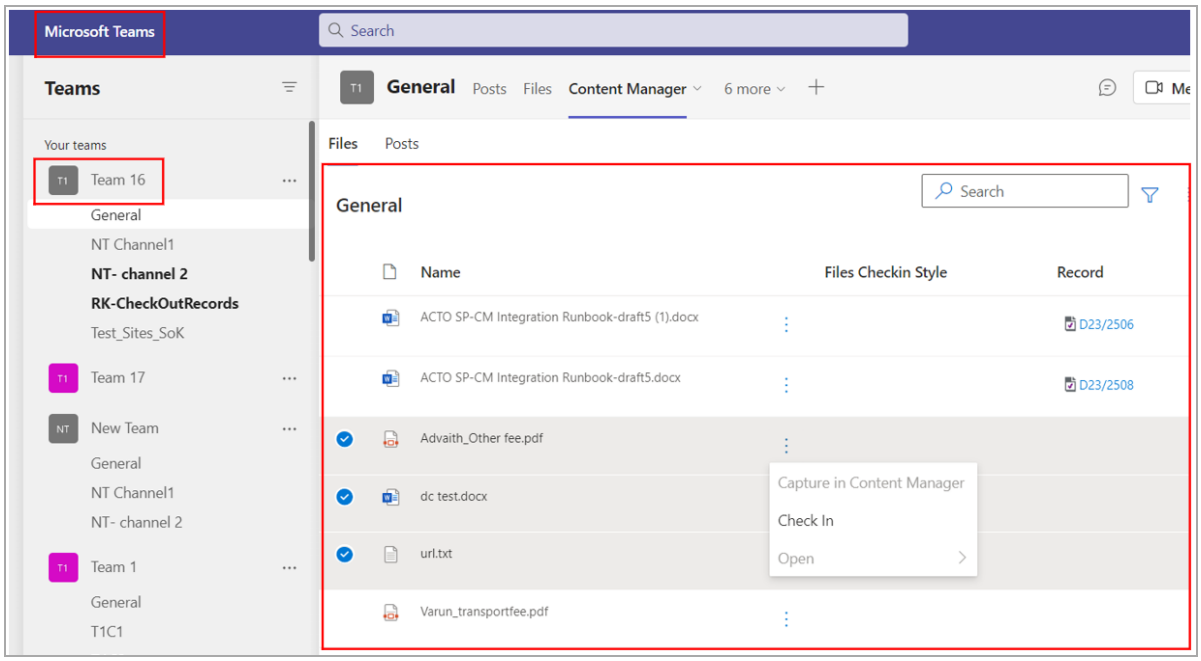
To switch between Content Manager document store and Manage in Place store, delete the entry and add a new one, accordingly.



Capturing content extends to SharePoint libraries

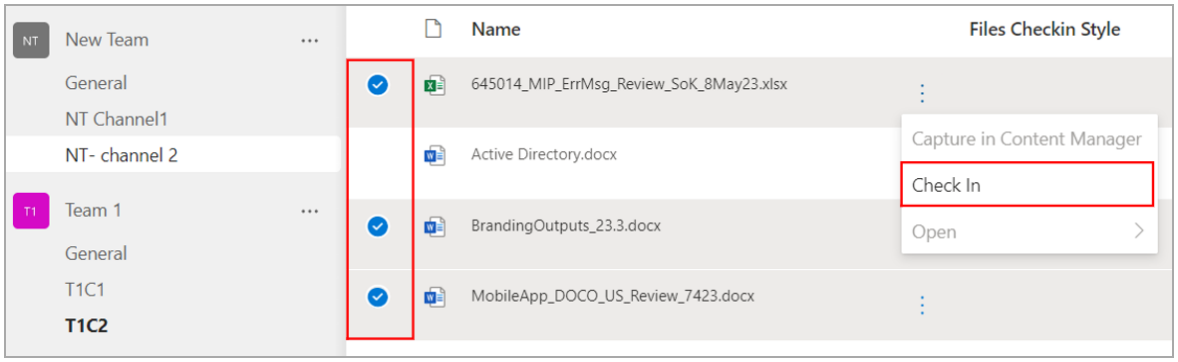
The functionality of capturing content from MS Teams channel is extended to capturing content from document libraries of your SharePoint sites.





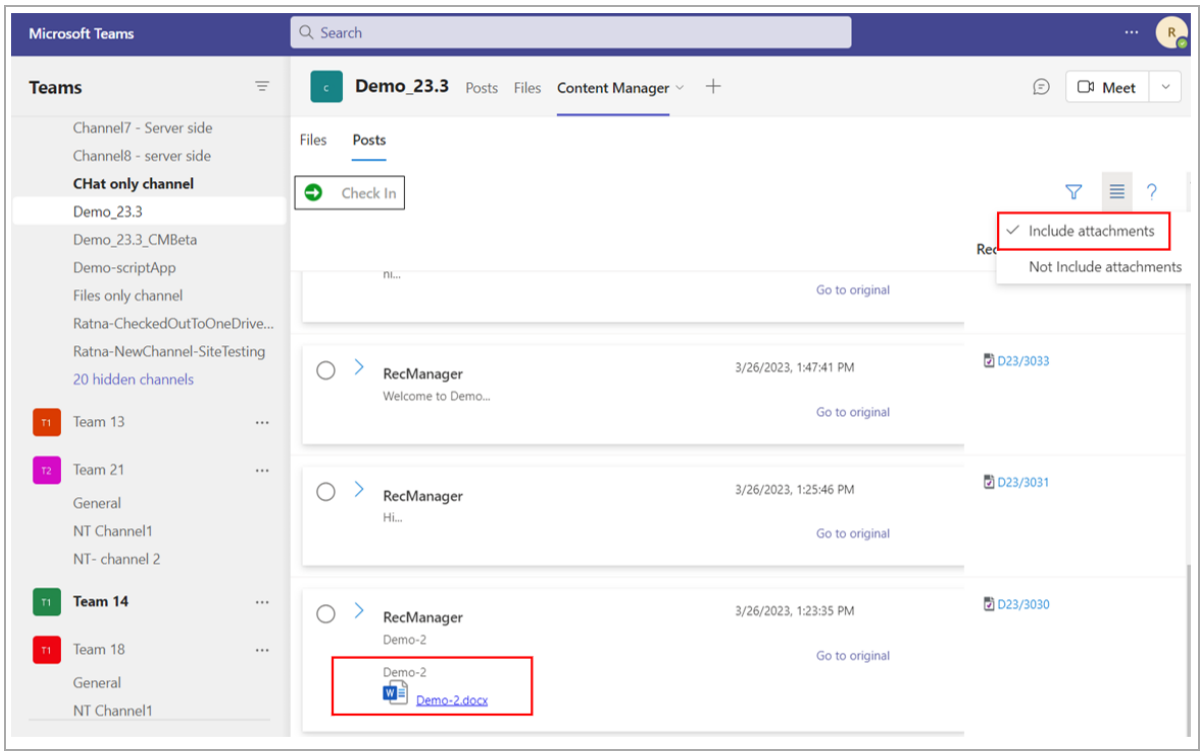
Capturing multiple files

You can select multiple files from channels, OneDrive or SharePoint sites and capture them to Content Manager.



Displaying attachment(s) in the posts

The MS Teams integration is enhanced with the option to display the attachments in your post. By default, the attachments in the post are not displayed and the option **Not Include attachments** is selected. To view the attachments associated with the posts, click menu and then select **Include attachments**.



Content Manager MS Teams and ZFP Office/Outlook Integrations

KwikSelect picker

When you capture content from MS Teams to Content Manager, the standard combo box to select a record type, location, edit status, classification, jurisdiction, record, lookup sets, and user label is replaced by the KwikSelect picker. This allows the user to filter the available list quickly and easily.

Container tab option for creating new Check In Style

Creating Check In Style is enhanced with a new **Container** tab in Content Manager Microsoft Teams and ZFP integrations.

The **Container** tab provides options for setting a default container for the record(s) created using this Check In Style, or an option to automatically find or create a container when creating a new record.

Content Manager Mobile App

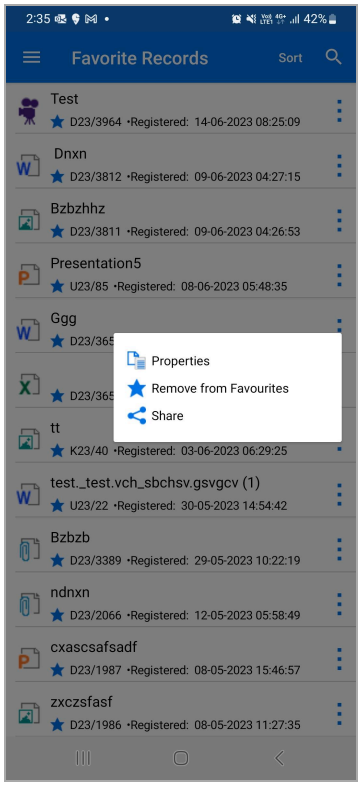
Secure storage for mobile

In the previous version of Content Manager Mobile App, the documents in **Downloaded Documents** for offline viewing were stored in the **Content Manager** folder on your phone. So, the documents were accessible outside of the Content Manager Mobile App.

In this release, to make the Content Manager Mobile App more secure, the access to **Content Manager** folder is disabled on your phone. This means, you will only be able to view the documents in **Downloaded Documents** from Content Manager Mobile App.

Replaced swipe view with action options

In the previous version, swiping a record to your left would display options to view record properties, add to favorites and share options. This feature has been replaced with the action options. Clicking the menu option on a record displays the action options - **Properties**, **Add to Favorites** or **Remove from Favorites**, and **Share**.



Content Manager Client

Ability to extract Rendition information

When adding a new rendition, you can extract Rendition information into the description or reason field. Once you select the **Rendition Type** and **Source document**, the **Description or Reason** is auto filled with file name and author name. You can modify the description or reason as needed.

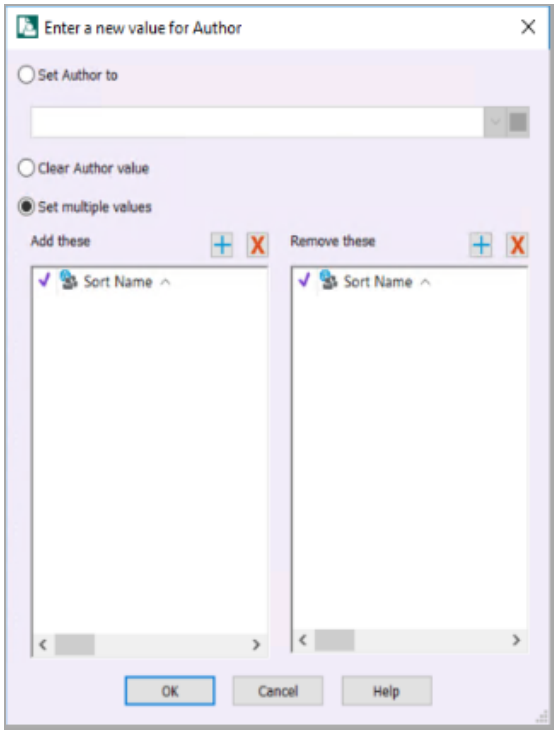
Enhanced Search By option

Search By in the quick search bar shows only the Recent or Favourite results. Click the Down arrow to the right of the field for the most recent data you searched by, favorites, and all terms

alphabetically sorted. Separators are added to differentiate between recent data, favorites, and all terms.

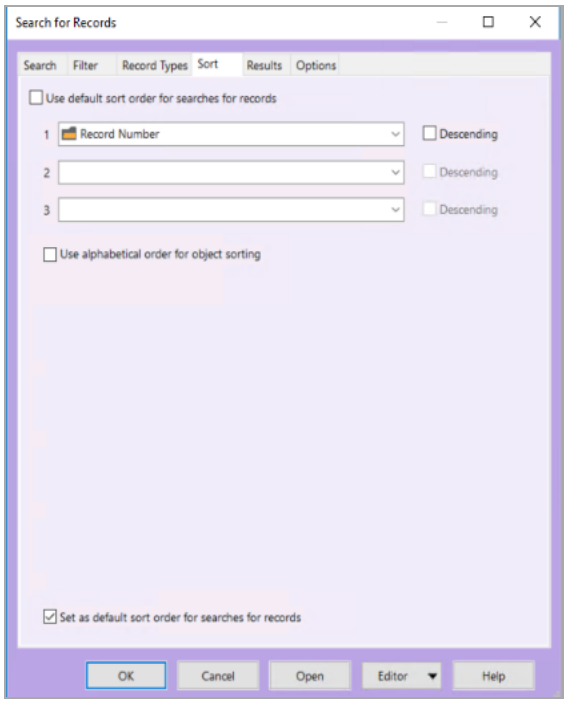
Setting multiple values using Property Editor

Some properties support multiple values, for example, **Author** and **Addressee**. If you have tagged multiple items and using **Property Editor** you are modifying properties that support multiple values, then in the **Enter a new value** dialog you have the option to set multiple values. Select the **Set multiple values** option. Click **+** to add values or click **X** to remove values in **Add these** or **Remove these** columns.



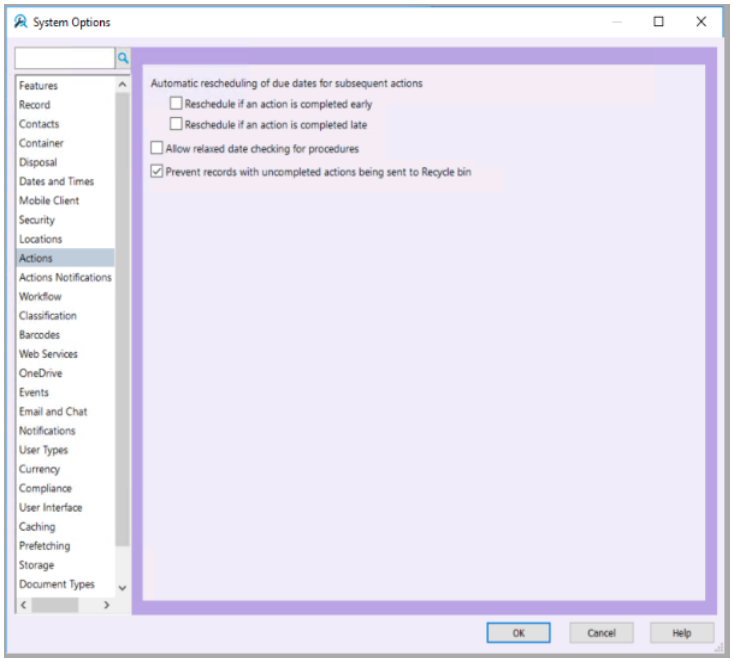
Setting sort order

The default sort order you choose can be set as default sort order for all future searches.



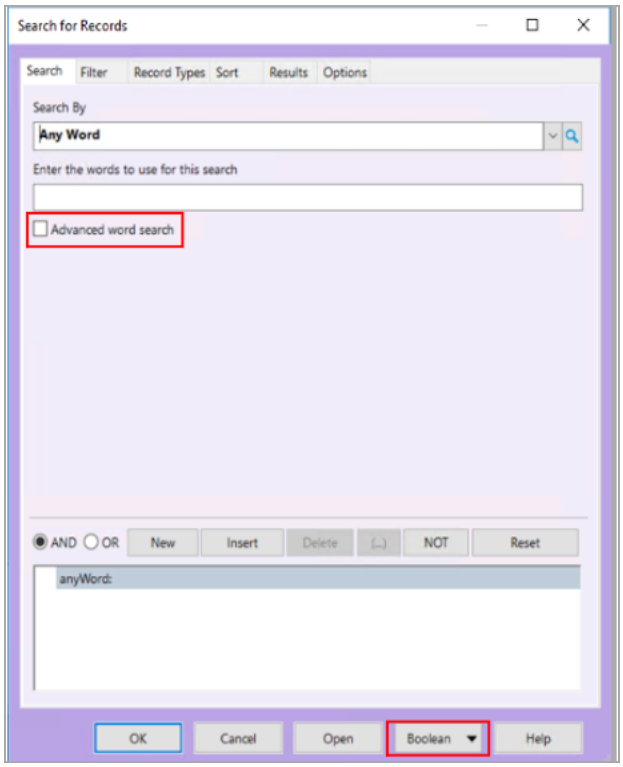
Recycle Bin

The option **Prevent records with uncompleted actions being sent to Recycle bin** prevents the records from being sent to recycle bin when the actions are still not complete. The **Send To > Recycle Bin** option will be disabled for such individual records.



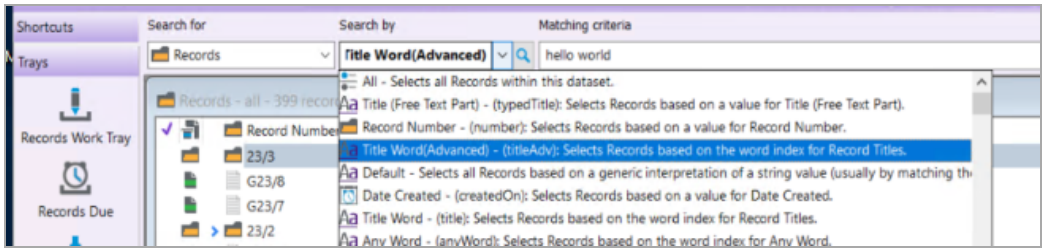
Search parser - Advanced Word Search

The search parser is enhanced with a new **Advanced Word Search** option that decodes the entire string by looking into values, keywords and search methods. When selected, the search parser decodes and identifies all the logic keywords, eg, OR, AND, NEAR and NOT, and uses them as logic operators in text search, otherwise all the words are used as search terms in text search.



Text search methods

The text search methods is enhanced with a new **Title Word(Advanced)** option that allows you to search for records with titles that include an apostrophe (') as part of the word, and/or a comma (,) as part of the phrase. For example, What's happened, has happened!. The **Title Word(Advanced)** search treats AND, OR, NOT, NEAR and parentheses as key words except if they are enclosed within the double quotes. Full text query is formed treating those keywords as logic operators.



Processing documents

Document queues

Removing a document from a queue, moves the document to Recycle Bin and removes it from the queue.

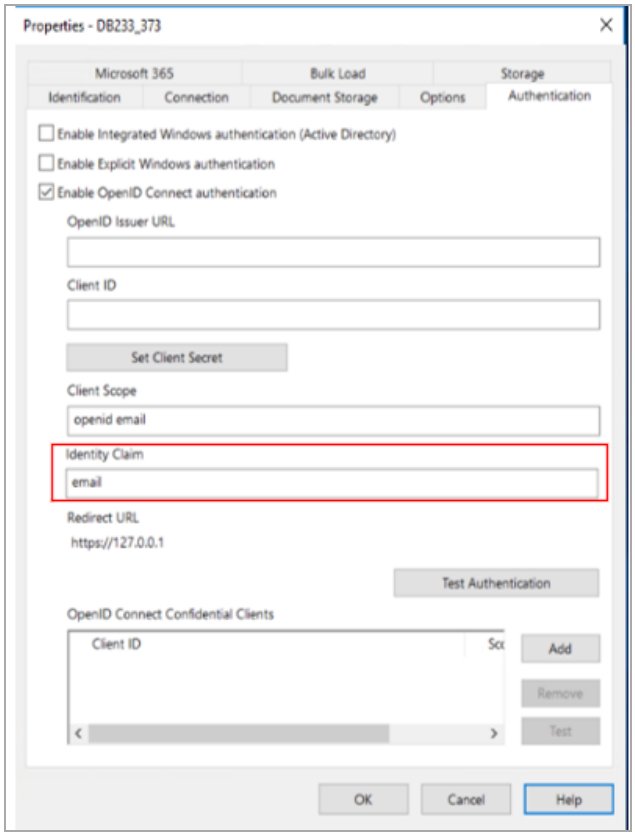
Dragging multiple documents

When processing multiple documents by dragging into Content Manager, the option **Delete Document from Folder** is enhanced to move the document to Recycle Bin and removes it from the queue for check-in.

Content Manager Enterprise Studio

Setting identity claim

The identity token Content Manager receives from an authentication provider, contains a number of claims specific to the user that is logging on. The Identity Claim field allows the administrator to specify which claim in the token should be used to identify the Content Manager user that is logging on. The default behavior is to look for an "email" claim.



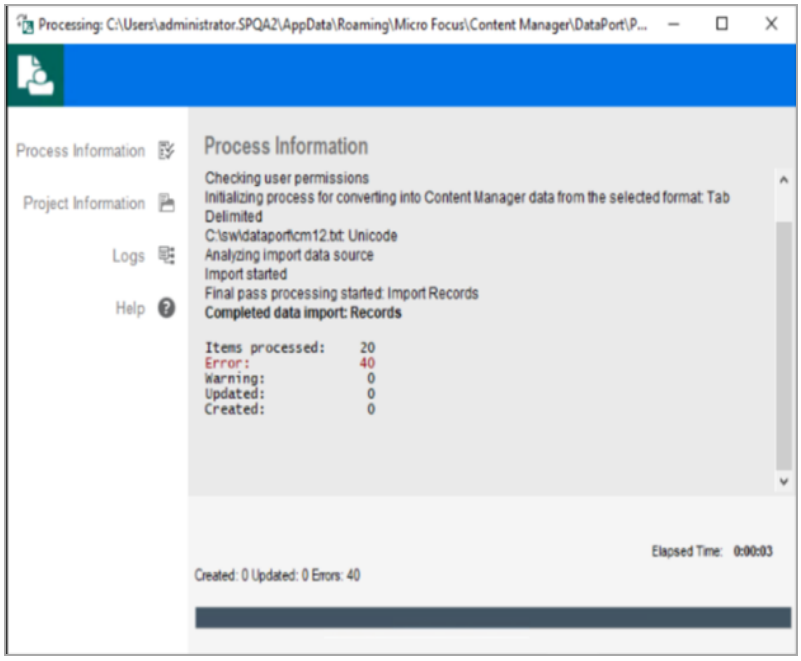
DataPort

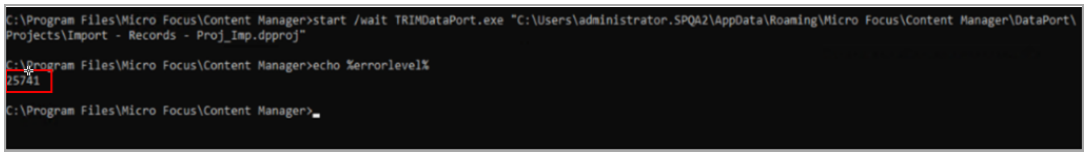
Provide exit code

The Process Information displayed when you execute a project in DataPort engine is updated. The information now includes Setting Property: Property Name, Value: Value from import file, items found, processed, exported or imported, errors and warnings.

When using the command line, the TRIMDataPort.exe application exits with an exit code of 0. During this process, it is difficult to know if any error occurred or not. This functionality is enhanced by providing an exit or return code.

If there are errors or warnings encountered, DataPort displays an exit code value greater than zero. The value 0 indicates that there are no errors or warnings encountered.





Obsoleted Platforms

- Internet Explorer

Please refer to **CM23.3_Spec.pdf** for details on the Support Matrix.

Obsoleted Features

- Support for Content Manager Mobile Web Client
- KGS ContentServer is a key element of the Content Manager SAP ArchiveLink module, a third-party middleware component providing connectivity between SAP and Content Manager. This middleware is provided by an SAP consulting company called KGS. The software they provide is called the KGS ContentServer.

  Content Manager SAP SKU is discontinued. For customers purchasing the Content Server directly from KGS, the support for SAP ArchiveLink and Content Manager integration will be available from KGS.