

# Content Manager

Software Version 23.3

## Specifications and Limitations

**opentext**<sup>™</sup>

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

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- Document Release Date, which changes each time the document is updated.
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## Specifications

### Introduction

OpenText Content Manager contains powerful and useful functions for electronic document and records management.

Because Content Manager can and should be configured in a number of ways depending on your requirements, the functions have been designed to be flexible without compromising rigorous document and records management standards.

Please note that Content Manager is designed to operate within the parameters of sound information management principles and that attempts to extend Content Manager beyond these parameters will adversely affect its implementation .

### Recommended minimum requirements

**NOTE:** For all machines which have Content Manager components installed, it is mandatory that the Windows® operating systems have the latest Universal C Runtimes update installed. For additional information regarding this update, please see <https://support.microsoft.com/en-us/kb/3118401>

#### **IMPORTANT: Viewing HTML files and adding GPS location**

If your organization is using Microsoft Edge browser for viewing HTML files and adding GPS locations to objects, then for the browser to work as expected, you will need to install Webview2 at runtime as a prerequisite. You can download Webview2 from the following URL:

<https://developer.microsoft.com/en-us/microsoft-edge/webview2/>.

If Webview2 is not installed, Content Manager will, by default, use the previous IE control.

**Main applications****Content Manager client (32-bit)**

Component	Requirement
Operating system	Windows 10 (32-bit) Professional or Enterprise Windows 11 (32-bit) Professional or Enterprise
Processor	Business class processor
Memory	2 GB RAM
Disk space	2 GB free space Sufficient space for configuration, document caching and logging.
Display	Graphics device capable of displaying a resolution of 1280 x 768 or higher
Installation prerequisites for .msi installation	Available for download: Windows installer 5.0 <a href="#">Microsoft .NET Framework 4.6.2</a>

For Web Client requirements, see [Content Manager Web Client Browser Support](#).

**Content Manager client (64-bit)**

Component	Requirement
Operating system	Windows 10 (64-bit) Professional or Enterprise Windows 11 (64-bit) Professional or Enterprise Windows Surface Pro 10
Processor	Business class processor
Memory	2GB RAM
Disk space	2GB free space  Sufficient space to manage configuration, document caching and logging.
Display	Graphics device capable of displaying a resolution of 1280 x 768 or higher
Installation prerequisites for .msi installation	Available for download: Windows installer 5.0 <a href="#">Microsoft .NET Framework 4.6.2</a>

For Web Client requirements, see [Content Manager Web Client Browser Support](#).



### Content Manager Workgroup Server (64-bit)

A Content Manager implementation must have at least one Content Manager Workgroup Server, but may have several depending on the number of Content Manager clients and their geographical distribution.

Component	Requirement
Operating system	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.
Processor	Business class server processor
Memory	4GB RAM or greater
Disk space	2GB free space for installation Sufficient space to manage configuration, stores and logs.
Display	Graphics device capable of displaying a resolution of 1280 x 768 or higher
Installation prerequisites for .msi installation	Available for download: Windows installer 5.0 <a href="#">Microsoft .NET Framework 4.6.2</a>

**NOTE:** The Document Rendering event requires the Onstream printer files to process events correctly. The required files are installed by default when using **Setup\_CM\_x64.exe**. If you're installing Content Manager using the .msi files, the **OnstreamPrinterFiles\_x64.msi** must be installed as well.

### Peripheral applications

Content Manager comes with a number of peripheral applications, which you can choose to install during client or server installation, or you may need to use one of the separate .msi files from the installation media.

Some of these have additional requirements.

**Content Manager Web Client Server (64-bit)**

Component	Requirement
Operating system	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.
Microsoft Internet Information Services (IIS) Version 10.0	For IIS 10: Windows Server 2016 For IIS 10: Windows Server 2019 For IIS 10: Windows Server 2022
Content Manager	Content Manager Workgroup Server
Installation prerequisite	<a href="#">Microsoft .NET Framework 4.6.2</a>

**Content Manager Web Client Browser Support**

Component	Requirement
Browser	Google Chrome version 108.0.5415 or above Microsoft Edge (Chromium open source engine) version 85.0 or above Mozilla Firefox version 109.0.1 or above
Tablet	iPad/iOS 14.1 running Google Chrome v86.0.4240.93

Content Manager Web Client is fully responsive to a minimum screen resolution of 768px by 991px.

**NOTE:** The supported Office applications are Office 2021, 2019 and 2016. The supported Office Online version is 16.0.7766.8550 and later.

**Content Manager for SharePoint (64-bit)**

**SharePoint Online**

Component	Requirement
SharePoint version	SharePoint Online
Microsoft Office	Any version supported by SharePoint Online
Browser	Edge is the browser supported when using configuration or information pages provided by the app. SharePoint users who do not need these pages can use any browser supported by the version of SharePoint.

**SharePoint 2013, SharePoint 2016 or SharePoint 2019 on premise**

Component	Requirement
SharePoint version	SharePoint 2013 SP1, SharePoint 2016 or SharePoint 2019
Operating system	Any operating system supported by SharePoint 2013 SP1, SharePoint 2016 or SharePoint 2019
Microsoft Office	Any version supported by SharePoint 2013 SP1, SharePoint 2016 or SharePoint 2019
Browser	Edge is the browser supported when using configuration or information pages provided by the app. SharePoint users who do not need these pages can use any browser supported by the version of SharePoint.

**Content Manager Servers in support of SharePoint 2013, SharePoint 2016 or SharePoint 2019**

Component	Requirement
Operating System	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.
Ancillary components	Content Manager Workgroup Server A SQL Server instance must be available on the same or a remote computer. Supported versions:  SQL Server 2016 SQL Server 2017 SQL Server 2019 SQL Server 2022

**Content Manager Service API**

Component	Requirement
Operating system	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.

Microsoft Internet Information Services (IIS) version 10	For IIS 10.0: Windows Server 2016 (64-bit) For IIS 10.0: Windows Server 2019 (64-bit) For IIS 10.0: Windows Server 2022 (64-bit)
Installation prerequisites for .msi installation	Available for download: Windows installer 5.0 <a href="#">Microsoft .NET Framework 4.6.2</a>

For Web Client requirements, see [Content Manager Web Client Browser Support](#).

**Content Manager WebDrawer (64-bit)**

Component	Requirement
Operating System Support	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.
Microsoft Internet Information Services (IIS) version 10	For IIS 10.0: Windows Server 2016 (64-bit) For IIS 10.0: Windows Server 2019 (64-bit) For IIS 10.0: Windows Server 2022 (64-bit) Role <b>IIS Management</b> selected
Prerequisites	Content Manager Workgroup Server must be installed with this application <a href="#">Microsoft .NET Framework 4.6.2</a>

**Integrations**

Content Manager integrates with a number of applications, which you can choose to install during client or server installation, or you may need to use one of the separate .msi files from the installation media.

Some of these have additional requirements.

**Content Manager Office integration**

Component	Requirement
Operating system	Same as Content Manager 32-bit or 64-bit client
Microsoft Office support	<p>Office 365 (Full, installed Office on PC, 32-bit or 64-bit)</p> <p>Office 2016 (32-bit or 64-bit)</p> <p>Office 2019 (32-bit or 64-bit)</p> <p>Office 2021 (32-bit or 64-bit)</p> <p>With a 32-bit version of Content Manager client, you must run a 32-bit version of Microsoft Office</p> <p>.</p> <p>With a 64-bit version of Content Manager client, you must run a 64-bit version of Microsoft Office</p> <p>.</p> <p>You can run 32-bit versions of Content Manager on supported 64-bit operating systems, and then integrate with 32-bit Office as supported by Microsoft.</p>
Installation prerequisite	Content Manager client (32-bit or 64-bit)

**Content Manager Zero foot print Office add-in**

Component	Requirement
Operating system	Windows 10 version 1903 or later
Microsoft Office support	Office 365*
Browser	<p>Google Chrome version 108.0.5415</p> <p>Microsoft Edge version 109.0</p>

\* Non O365 Office desktop, for example Office 2016 or 2019, are not supported.

**Content Manager Mobile App**

<b>Component</b>	<b>Requirement</b>
MobileApp	<ul style="list-style-type: none"> <li>• iOS 15 and 16</li> <li>• Android 11 and 12</li> </ul>
Smartphone	<ul style="list-style-type: none"> <li>• iPhone/iOS 15.0 /16.0 running Google Chrome (latest version)</li> <li>• Android 11 /12 running Google Chrome (latest version)</li> </ul>
Tablet	<ul style="list-style-type: none"> <li>• Android 11 /12 running Google Chrome (latest version)</li> </ul>
iPad	<ul style="list-style-type: none"> <li>• iPhone/iOS 15.0 /16.0 running Google Chrome (latest version)</li> </ul>

**Content Manager EmailLink email integration**

<b>Component</b>	<b>Requirement</b>
Microsoft Exchange Server	Exchange Online Exchange 2016 Exchange 2019
Google Mail (Gmail)	Gmail for Business

**Content Manager Kofax integration (32-bit)**

<b>Component</b>	<b>Requirement</b>
Operating system	Windows 10 Professional or Enterprise (32-bit or 64-bit)
Kofax Capture support	Versions 11.0 and 11 SP1
Prerequisites	Content Manager client (32-bit)

**Content Manager Warehouse integrations (64-bit)**

Component	Requirement
Operating system	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.
Prerequisites	Content Manager core libraries installed using <b>Setup_CM_x64.exe</b>

**Content Manager IDOL integration**

Component	Requirement
Operating system	Windows Server 2016 (64-bit) Windows Server 2019 (64-bit) Windows Server 2022 (64-bit)  <b>NOTE:</b> Windows core, which is a no GUI flavour of Windows Server, is not supported.
IDOL support	IDOL 23.2 Enterprise or OEM Content Manager uses IDOL 23.2 OEM for the following Content Manager features: — Document content indexing — Optical Character Recognition (by using IDOL Media Server) — Auto Classification (by using IDOL Automatic Categorization) Older versions of IDOL Enterprise are supported on principle, but they may not support the above Content Manager features.
Prerequisite	Content Manager client (64-bit)

**Elasticsearch**

Content Manager 23.3 supports Elasticsearch 8.4.

### **ControlPoint integration with Content Manager (64-bit)**

For the details on supported versions, refer *Control Point Support Matrix* available at [Documentation Portal](#).

### **Structured Data Manager integration with Content Manager**

For the details on supported versions, refer *Structure Data Manager Certification Matrix* available at [Documentation Portal](#).

### **Content Manager document viewer supported file formats**

Content Manager uses KeyView 23.2 P1 Hotfix (23.2.1.8531).

### **64-bit support**

You will find the 64-bit .msi files on the installation CD. Their file names end in **\_x64**.

Content Manager 32-bit applications run on 64-bit operating systems; however, Content Manager 64-bit applications do not run on 32-bit operating systems.

Content Manager 32-bit clients and Content Manager 64-bit clients can connect to a Content Manager 64-bit server.

### **Other Environment**

#### **Content Manager in virtual environments**

OpenText Software undertakes both development and testing of Content Manager in VMWare virtualized environments.

Where an operating system supported for Content Manager is virtualized, this should be transparent to Content Manager; and this has been OpenText's experience to date. OpenText has numerous customers worldwide successfully using Content Manager in virtual environments, with few or no issues. To date, all issues that have arisen have been resolved by reconfiguration of either the virtual host environment or the hosting hardware itself.

With regard to system performance, running Content Manager in a virtual environment is likely to result in increased CPU utilization or other hardware resource consumption. This can result in a reduction in system workload capacity; hence a corresponding increase in transaction response times. OpenText strongly encourages customers and partners to gather baseline performance statistics for Content Manager in both conventional and virtual environments, and satisfy themselves as to the stability and performance of selected virtual environments before using them for production implementations.

If an issue arises in a virtual environment that does not also occur in a conventional environment; OpenText cannot guarantee a resolution to the issue. Where it is apparent that a particular issue is specific to virtualization technologies, OpenText may ask the customer to reproduce the issue in a non-virtualized environment before committing further support resources.

#### **Content Manager and Citrix**

OpenText neither formally test nor certify Content Manager on any version of Citrix; nor do we produce documentation about deploying Content Manager in Citrix. It is the customer's responsibility



to perform in-house testing in their own network environment with their own version of Citrix before deciding whether Citrix is a suitable deployment platform for Content Manager in their organization.

OpenText Support makes every reasonable effort to assist a customer who reports an issue with Content Manager where it has been deployed using Citrix, but we do not support the Citrix environment itself. OpenText's past experience with Content Manager sites using Citrix suggests that when Citrix is configured correctly, e.g. user profiles, home drives, printers etc. behave similarly to a non-Citrix desktop environment, and Content Manager is deployed in a desktop that includes any applications to be integrated with Content Manager, e.g. Microsoft Office suite and email, there should not be any significant issues.

If an issue arises with Content Manager in a Citrix environment that does not also occur with a conventional Content Manager installation, OpenText cannot guarantee a resolution to the issue. Where it is apparent that a particular issue is specific to the Citrix deployment, OpenText reserves the right to ask the customer to reproduce the issue in a non-Citrix environment before committing further support resources.

For more information on this subject, see the OpenText Software Support article at <https://softwaresupport.softwaregrp.com/km/KM1456476>

## Relational Database Management System (RDBMS) requirements

### Supported RDBMS servers (64-bit)

- SQL Server 2017
- SQL Server 2019
- SQL Server 2022
- Microsoft Azure SQL Database
- Amazon RDS for SQL Server
- Oracle 18c
- Oracle 19c
- Oracle CDB/PDB (Pluggable database created in container database)
- PostgreSQL 15.2.2

**NOTE:** When creating a SQL Server database for Content Manager, it is strongly recommended that you use a case-insensitive (CI) collation sequence.

### Minimum Requirements for database access

For SQL Server:

The user assigned to the database should at least have the following permission:

- db\_owner

For Oracle:

The role assigned to the schema used should at least have the following permissions:

- Alter Session
- Create Session
- Create Procedure
- Create Sequence
- Create Table
- Create View
- Create Job
- EXECUTE ON CTXSYS.CTX\_DDL
- SELECT ON SYS.DBA\_REGISTRY

For PostgreSQL:

The role assigned to the database should at least have the following permission:

- Superuser

### Supported RDBMS clients (64-bit)

The Content Manager Workgroup Server requires RDBMS client drivers to connect to its databases. The drivers are dependent on the type of RDBMS in use. For example:

#### For SQL Server, Azure SQL and Amazon RDS for SQL Server

Content Manager relies on Open Database Connectivity (ODBC) to access the databases. It is recommended to use ODBC Driver 18.0. It can be downloaded from <https://learn.microsoft.com/en-us/sql/connect/odbc/download-odbc-driver-for-sql-server?view=sql-server-ver16>

#### For Oracle

**IMPORTANT:** If you are running the process index text, bulk loading, migration, or temp table with bulk load support, the Oracle client must be installed on the Workgroup Server that includes the SQL Loader.

If you are using the Oracle OCI connector you cannot run an index text, bulk load or migrate from that Workgroup Server.

**NOTE:** In Oracle, the **CURSOR\_SHARING** system parameter can be set to **EXACT** or **FORCE**. Content Manager supports both the values, **EXACT** or **FORCE**, for **CURSOR\_SHARING**. However, Oracle does not recommend setting the **CURSOR\_SHARING** system parameter to **FORCE** permanently.

Content Manager relies on the Oracle Call Interface (OCI) to access the databases. There are two methods available to facilitate this:

1. By default, we include the Oracle Instant Client as part of our software. This means no additional client software is required and the connection string will require an IP address of the Oracle server.
2. If the user wishes to rely on Oracle's Transparent Network Substrate (TNS), they will require a separate Oracle Client installation (excluding the Instant Client). They will also need to setup a

System Environment Variable on the Workgroup Server, such as follows:

Variable name: ORACLE\_HOME

Variable value: C:\oracle\product\12.1.0\client\_1

The variable value comes from the Oracle client's Installation registry entry (this is dependent on the installed environment) e.g.

HKEY\_LOCAL\_MACHINE\SOFTWARE\ORACLE\KEY\_OraClient12Home1

**NOTE:** If you want to use different version of Oracle client than what is bundled with Content Manager, then after installing Oracle client and configuring the ORACLE\_HOME location, delete the `oci.dll` located at Content Manager install folder (for example, C:\Program Files\Micro Focus\Content Manager).

### For PostgreSQL

Content Manager relies on ODBC to access the databases. We recommend using `psqlODBC`. It can be downloaded from <https://odbc.postgresql.org/>

## Special Database Considerations

### General

- **Escape all special characters in search text**

If you are searching using the text indexing and your search text contains any special character (s), escape all the special character(s) in the search text.

### SQL Server database

- **Geographic Information System (GIS) implementation**

Content Manager supports GIS data in SQL Server databases. There are no additional installation requirements.

- For SQL Server authentication at database level, minimum required permission is **db\_owner** but the available databases drop down will not work at Content Manager Enterprise Studio, the connection string can be built using cut and paste.

To use the database browsing using the drop down box, same user should be available in master database but not required to be **db\_owner** at master.

- **BULK INSERT is not supported**

If you want to get the bulk insert to function, use the Windows authentication.

### Oracle database

- **ANSI to Unicode conversion**

The conversion to Unicode in Oracle needs either NCHAR or database character set with Unicode support. If the database character set is Unicode supported, the conversion is done based on the database character set which is more efficient and fast. Otherwise, based on the

NCHAR character set provided it supports Unicode but the conversion process (converts all the Unicode columns to NCHAR or NVARCHAR datatypes) is slower than the former.

- **Geographic Information System (GIS) implementation**

Content Manager supports GIS data in Oracle databases.

To facilitate this, one of the following Oracle products must be installed:

- Oracle Spatial and Graph – supports a wide range of spatial and graph analytics and has Licence requirements. Please refer to the following documentation for more information: <http://docs.oracle.com/database/122/SPATL/toc.htm>
- Oracle Locator – a free version of the basic Spatial features: Please refer to the following link for details: <http://docs.oracle.com/database/122/SPATL/oracle-locator.htm#SPATL340>

### PostgreSQL database

- **Geographic Information System (GIS) implementation**

Content Manager supports GIS data in PostgreSQL databases.

To facilitate this, the following PostgreSQL extension must be installed:

- PostGIS 2.3 bundle for PostgreSQL 9.6 (64-bit) from Stack Builder 4.0's Spatial Extensions.
- Next, the administrator needs to enable the 'postgis' Extension in the database. This can be done by either of the following methods:
  - Running a script.
  - Selecting a check box in the pgAdmin 4 interface.

Please refer to the following link for alternative sources and more information: <http://postgis.net/>

### Amazon RDS for SQL Server

- Amazon RDS for SQL Server is highly compatible with later versions of Microsoft SQL Server. As such, Content Manager works with Amazon RDS for SQL Server almost identically to a Content Manager SQL Server implementation. Amazon RDS does have one main limitations that change the way Content Manager works:
  - **No support for BULK INSERT**- Amazon RDS does not support the BULK INSERT command and so a special version of this function is provided by Content Manager for Amazon RDS for SQL Server implementations. It provides the same functionality, however it cannot emulate the performance of the standard BULK INSERT of SQL Server.

## Limitations and Behaviors

### Authentication

- ADFS authentication and/or connecting to a Workgroup Server via HTTPS are indicators that a user is connecting to a Cloud version of Content Manager, and in the cloud, the client computer will not be able to access certain resources that exist in the Cloud, e.g. the URL of the IDOL Index Server, or the file system path that is used when adding objects to a Document Store. The time out settings on ADFS OAUTH tokens come with can also cause issues for long running Content Manager programs, as the program gets a timeout during running and the user cannot log again. As a result, a number of tasks on the Administration tab in the Content Manager client will not be displayed if you are accessing the client using ADFS authentication, or connecting to the Workgroup Server via HTTPs, or you are using Explicit Windows Authentication.

These tasks include:

- **Setup group:**
  - Document Stores
- **IDOL Indexes group:**
  - IDOL Record Reindex
  - IDOL Category Training
  - IDOL User Reindex
- **Conversions group:**
  - SAP Metadata Conversion
  - Saved Search Conversion
  - Security Filter Converter
  - Mail Message Format Conversion
- **Inactive Records group:**
  - Electronic
  - Physical
- **Other group:**
  - Import/Export
  - Recalculate Disposal Dates
  - Manage Thumbnails

### Product Accessibility

We're committed to developing products that are accessible to everyone. Content Manager has been developed to be compatible with accessibility products that implement Microsoft UI Automation (UIA) APIs.

To request an Accessibility Conformance report for Content Manager, please go to the [Accessibility Conformance Reports](#) site.

### Supported Languages

In regards to the English language choices within our software, by design, we follow the Oxford Dictionary which accepts the US spelling as equivalent in both languages and therefore some words are not converted if the language is changed between English (US) and English (International), for example Favorites.

Released Version	Supported Languages
23.3	English (International), English (United States)
10.1 (multi-language).x	English (International), English (United States), Dutch, French, Spanish
10.1	English (International), English (United States)
10.0 (multi-language).x	English (International), English (United States), Dutch, French, Spanish
10.0	English (International), English (United States)
9.4 (multi-language).x	English (International), English (United States), Dutch, French, Spanish
9.4	English (International), English (United States)
9.3 (multi-language).x	English (International), English (United States), Dutch, French, Spanish
9.3	English (International), English (United States)
9.2	English (International), English (United States)
9.1	English (International), English (United States)
9.0 (multi-language).x	English (International), English (United States), Dutch, French, Spanish

**NOTE:** The Content Manager Web Client and Thin Office integration only supports Dutch, French and Spanish from 9.0 Patch 1. The **CM\_ThinOfficeMultiLanguage\_xNN.msi** and **CM\_WebClient\_Languages\_x64.msi** cannot be installed for the 9.0 version.

The translated language files for Content Manager SharePoint integration will be available as a part of the SharePoint installation MSIs for 9.0 Patch 1. You will need to install the **CM\_LanguageFiles\_xNN.msi** after you've upgraded your Content Manager SharePoint environment to version 9.0 Patch 1.

	The translated language files for the Content Manager client can be installed using <b>CM_LanguageFiles_xNN.msi</b> to any release of the 9.0 version.
9.0	English (International), English (United States)
8.3x	English (International), English (United States), Dutch**, French**, Spanish**

\* software only (documentation has not been localized)

\*\* the language pack installers for the translated files are available on the relevant version ISO or can be downloaded from <https://softwaresupport.softwaregrp.com/> These language pack installers can be used to install the currently supported languages to any release of the relevant version, for example, the language files for 8.2 can be installed for 8.2, 8.2 Patch 1 etc.

### Unicode support

Content Manager can manage any Unicode metadata and content, as long as the database is configured to support Unicode characters. Without the database supporting Unicode characters, Content Manager will regard these characters as invalid and an error message will be displayed.

**NOTE:** Content Manager Title and Notes word indexing relies on word splitting using spaces and punctuation, and does not have capability to correctly index data that does not split words using spaces or punctuation. If you're using IDOL to document content index your Content Manager objects, they will be indexed, but if you want to search for them you'll need to have the appropriate Asian language packs installed with IDOL so it can properly understand how to split the words. For additional information about IDOL and Asian languages, refer to the IDOL Customer network on <https://softwaresupport.softwaregrp.com/manuals>

### Installation

- The versions of all Content Manager peripheral applications, components and integrations on the computer have to be the same as the version and build number of the main Content Manager application on the same computer
- When installing, upgrading, repairing or removing Content Manager applications, all applications on the computer should be closed

### License Keys

- When applying a new License Key for a pre-8.2 version of Content Manager, the Global Settings are not retained and will need to be reconfigured and deployed after the License Key has been applied.

### Help

- **F1** does not display correct Help topic on right-click menu options – when you press **F1** to display the associated help topic for a right-click menu item, the topic that appears instead is for

the list panes and view panes, which is on the screen behind the floating right-click menu. This is a known limitation.

- Due to the nature of the translation process, Help files in languages other than English may not contain the latest content and in rare cases, links may not work correctly. For the latest content, consult the Help file in an English version.
- Our own document **OurOwn.pdf** is a sample document that you can replace with your organization's own document for users to access their own procedures using the Content Manager Help file. The link from the Content Manager Help file to **OurOwn.pdf** works when Content Manager is installed in the default folder **Program Files\Micro Focus\Content Manager**; however, the link does not work when Content Manager is installed in a different folder unless you edit the **Start In** parameter in the shortcut to the new Content Manager folder path.
- The OurOwn.chm runtime merge facility has been tested to work when developed with the help authoring tool Madcap Flare. Other help authoring tools are not guaranteed to work.

### Access control and security

- Downgrading a user's security profile – when you downgrade the security profile of a user and they have records marked to them that are of a higher security level than the users, then no security violation warning may appear.  
For example, create a record within a Record Type which has top secret profile settings making **User** the **Assignee** Location. **User** has a top secret profile. Then downgrade **User** to **Unclassified**. The record now has an **Assignee** Location with a lesser security profile than itself. However, you can use the Content Manager system option in the **Security** tab **When changing Assignee, Home or Owner for a Record to a less secure Location** to set up Content Manager to display a warning or even prevent the downgrade.
- Access Controls and record creation and default Retention Schedules - Access Control on a Retention Schedule that is set as a default for a Record Type will not prevent users from creating records of that Record Type if the **Retention Schedule** field is not on the New Record form. Adding the **Retention Schedule** field to the New Record form for the Record Type will prevent users from creating records of that Record Type using the default Retention Schedule.
- Access Restrictions and US DoD 5015.2 compliance – when **Administration** → **System Options** → **Features** tab, **Classified Security** or **Compliance** tab, **Implement US DoD 5015.2 compliance**, or both are selected, Content Manager operates according to the US DoD 5015.2 software application design criteria standard.

### Security considerations

**Issue** Information systems must not be susceptible to Cross-frame Scripting (XFS) attacks and clickjacking.

**Solution** To avoid Cross-frame Scripting (XFS) attacks and clickjacking, add the following **<customHeaders>** element in **Web.config** available in your installation directory:

```
<customHeaders>
<add name="X-Frame-Options" value="SAMEORIGIN"/>
</customHeaders>
```



**Issue** Internet facing Information system must implement the HTTP header HTTP Strict-Transport-Security(HSTS).

**Solution** To enable HSTS, add the following **<customHeaders>** element in **Web.config** available in your installation directory:

```
<customHeaders>
<add name="Strict-Transport-Security" value="max-age=60; includeSubDomains" />
</customHeaders>
```

**Issue** Information systems must enforce controls that prevent confidential information and Personally Identifiable Information(PII) from being stored within a persistent cookie or cached on the client system.

**Solution** To address the above issue, add the following **<customHeaders>** element in **Web.config** available in your installation directory:

```
<customHeaders>
<add name="Cache-Control" value="no-store"/>
<add name="Pragma" value="no-cache"/>
</customHeaders>
```

**Issue** The X-Content-Type-Options HTTP header is a security header that is designed to protect web applications from MIME type sniffing attacks.

**Solution** To address the above issue, add the following **<customHeaders>** element in **Web.config** available in your installation directory:

```
<customHeaders>
<add name="X-Content-Type-Options" value="nosniff" />
</customHeaders>
```

**Issue** CM (Service API) is Prone to HTTP DoS Attack (Slowloris)

**Solution** For the Slowloris attack, you can limit request attributes through the **maxAllowedContentLength** and **maxQueryString** attributes in **Web.config** file.

**Issue** CM (Service API) is Vulnerable to CSRF Attacks (Cross Application)

**Solution** To address the issue, the attribute **requireAntiForgeryToken** is set to **true** by default.

If your application developed using our API breaks either in ServiceAPI, WebDrawer, thin office integration, or safe guard cyber integration, then add the attribute **requireAntiForgeryToken** in **hptrim.config** file and set the value to **false**.

Open the **hptrim.config** from either **C:\Program Files\Micro Focus\Content Manager\Service\_API** (Service API) or **C:\Program Files\Micro Focus\Content Manager\WebDrawer** (WebDrawer), locate the **<hptrim>** tag, and set the **requireAntiForgeryToken** attribute value to **false**.

For example,

```
<hptrim poolSize="1000" highResPDFThumbnails="false" indexPagePath="~/Search"
autoPoolClean="true" ignorePropertyErrors="true" serviceFeatures="Html,Razor,Json"
xmlns="http://HP.HPTRIM.Service/WebDrawer"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://HP.HPTRIM.Service/WebDrawer hptrimConfig.xsd"
requireAntiForgeryToken="false">
```

## Records and containers

Containers are generally used to collect material related to a complex business transaction in order that the entirety of the transaction can be well understood at a later point in time. As such, containers rarely exceed 300 documents. Some customers create containers to collect similar but unrelated documents together for the convenience of bulk disposal.

Content Manager is designed to support both of these requirements, however some limitations become evident when creating very large containers (over 1000 documents), as some user interface elements are built with a smaller container size in mind. For example, navigating to the contents of a container will display the contents in descending chronological date order – this sort increases the response time as the container gets bigger.

It is recommended to organizations that have a business requirement to create large containers that they do not apply individual retention rules to the contents. This can lead to delays in reviewing contents at time of disposal, particularly if you choose to archive based on an aggregated disposal schedule.

However, if you really need to use containers with large numbers of records in Content Manager, you can improve performance with the option **Optimize management of contained Records to allow for very large folder sizes** in the **System Options - Container** tab.

See Content Manager Help for more details about this option.

It is generally also recommended not to use too many container levels.

A typical implementation uses three container levels:

- Documents
- Folders
- Archive Boxes

More container levels may lead to performance degradation when Content Manager performs recursive comparison such as checking security or retention rules across multiple aggregation levels. Content Manager checks retention rules recursively down through a maximum of four container levels.

- Record creation and Record Types using **Numbering by Container** - when you number records by container and then change the number of the container, the contained records will not have their corresponding record numbers updated to reflect the new container number. Similarly, when you change the record's container, this will not update the record's number either. In these circumstances, it is best to manually renumber the contained records.
- Record titles using **Client titling** - changing a Location name will not change any records created using the Location as the Client title. The change will, however, be reflected in the **Properties** dialog of the record; but not in the title displayed in the view or list panes. Searching by Client Contact with the new Location name will find the record.

To manually rectify this:

1. Find any records created using the Location
2. Modify the Location name

3. Right-click one of the records and select **Properties**. In the **Client** field, delete any Location item and then use KwikSelect to choose the modified Location
  4. Click **OK** to save the change
  5. The record title will change accordingly and will now show the correct Location
- Copy record - copying record relationships behavior - when **Copy Relationships** is selected when copying a record, only the **is Related To** relationship type is copied. An exception is when creating a new version, in which case any **IsTempCopy** relationship is copied. This is to avoid potential conflicting or incorrect relationships being created by the copy operation. For example, if record A has a **supersedes** relationship with record B and a user then copies record B to create record C, then does record A supersede record C?
  - Copy record - **Date Due for Destruction** and **Date Inactive** are not copied from the original record when a new part, new version or record copy are performed. For a new part, Content Manager does not copy **Date Published**, either. While the process of copying a record creates a blank **Date Due for Destruction** field, any pre-determined states will enter an appropriate date, for example, a Retention Schedule attached to a record being copied, default Retention Schedule on a record, etc.
  - Notes field limitation – the **Notes** field is limited to 64 KB (65536 characters). If a user exceeds this limit, the message **An attempt to set the Notes text to contain XX KB failed. Notes text cannot exceed 64KB (65536 characters). The Notes text will be truncated at this limit** appears.
  - Record title length limitation - When you drag and drop a record, which has record title of more than 150 characters, from Content Manager to your desktop/folder on your system or to the Web Client, then the record title length is truncated to 150 characters. This is because the Windows file system has limitation of 150-240 characters, depending on the Operating System you are using.

### New Record forms

- Scroll bars - when there are more fields on the form than can be shown in the standard size New Record form dialog box, the New Record forms will have vertical and horizontal scrollbars allowing the users to scroll through the fields on the form. If, however, too many fields are on the form, the dialog box may have problems displaying all the fields.
- Mandatory container fields - when selecting **Container Numbering** for a Record Type, the Record Type will automatically enter Container as a mandatory field for the new New Record form. However, if you change the numbering to a different type, then Content Manager does not remove the **Container** field from the form automatically and therefore, you need to remove it manually.
- Assignee Location on a New Record form filled in and then replaced - when there is an **Assignee** field on a form first and there is actually a Location there that was added according to the system rules for enclosed - that is, that require the user to set an Assignee to keep a record from being enclosed automatically - then when a user types in a container for the record, it

removes the allocated Assignee and replaces it with the container number.  
To rectify this, you need re-assign the record.

- **Enclose** option - when on a New Record form, the **Enclosed** option will override the record's details and the set defaults from the Record Type or system settings
- Default **Enclose?** option
  - will not retain its default setting in the form and apply it to a new record.
  - If you set up the default **Enclose** option for a record to **No**, then when you enter a container on the form, the option details will be overwritten. Therefore, even though the **Enclose** option is not selected on the form because of the default, the record will still revert to the container as the **Assignee** and **Enclosed?** will be **Yes**.
  - the **Enclosed?** behavior is programmatically selected, i.e. not configurable using **System Options**. For this behavior to occur, a record's **Assignee** Location must be equal to the record's **Home** Location. This can be achieved in a number of ways, for example, Record Type Default Location or **Administration** → **System Options** → **Locations** tab.

#### Method 1

- a. Record Type - Default **Home** Location = Blank
- b. **System Options** - Record **Assignee** = Current Login
- c. Record **Owner** = Assignee
- d. Record **Home** = Assignee
- e. Record Details after creation are: **Enclosed?** = **No**
- f. Assignee = At Home Location: User1
- g. **Owner** = User1
- h. **Home** = User1
- i. Right-click this record → **Location** → **Container**.  
Here you will see that the **Enclosed?** selection box is cleared with an informative message telling you this record is currently **at Home in User1**.  
If you choose a container, this will become its new Home Location and the record will be enclosed automatically.

#### Method 2

- a. Record Type - Default **Home** Location = Position1
- b. **System Options** - Record **Assignee** = Default Position
- c. Record **Owner** = Assignee
- d. Record **Home** = Assignee
- e. Record Details after creation are: **Enclosed?** = **No**
- f. Assignee = **At Home** Location: Position1
- g. **Owner** = Position1
- h. **Home** = Position1

- i. Right-click this record → **Location** → **Container**.  
 Here you will see that the **Enclosed?** check box is cleared with an informative message telling you this record is currently **at Home in \*\*\***.  
 When you choose a container, this will become its new Home Location and the record will be enclosed automatically.  
 When you change the Home Location, then the Assignee will keep the default Assignee Location from the Record Type.

**NOTE:** The **Associations** of a Location only go up one level. You can make the parent Organization the default, for example, in the following hierarchy structure; Parent Organization - Child Organization - Position – Person.  
 The default Organization for Person will always be Child Organization unless you manually make Parent Organization the default.

On a New Record form, when a user has explicitly changed the value of an Additional Field that has a default value determined by the record Classification, and then changes the Classification, then Content Manager does not change the Additional Field's value to the value determined by the new Classification

### Searching

- **Classification Word** searches – when you enter one word, it means **find records whose attached Classification contains the word**

**NOTE:** When you enter many words, it means **find records where the attached classification contains all the words**

When you type a wildcard character (\*), it means **find records where the attached classification contains a word matching the wildcard character**

When you type a wildcard character and one or more other words, it means **find records where the attached classification contains a word matching the wildcard and contains all the other words as well**

- **Record Number Range** searches – this search method is a simple string search method that searches alphabetically for the values you entered, whether they are numbers or letters. Therefore, it is essential that you know the record number pattern of the records you are looking for.  
 For example, when you enter a search for records in the compressed number range from 1998/1 to 1998/100, Content Manager does not return record 1998/50, because alphabetically, it is not within the range you specified.  
 Workaround: When searching for a range of records using Record Number:
  - use the KwikSelect on the To and From fields to select valid Content Manager record numbers, rather than typing the numbers in.
  - when manually entering record numbers into the TO and FROM field ensure that the record numbers are validated (goes bold)
  - use expanded Record Numbers in the To and From fields

- use the Expanded Record Number search method (Numberx) as this search method validates the numbers that are entered into the To and From fields.
- Sort order of container content – subordinate items under a container that you expand with the plus symbol are not sorted according to the criteria the container is sorted by, but by a default field. For example, records under containers are sorted by **Date Registered** in descending order.  
Workaround: Right-click the container record and click **Contained Records** to see the container content in a separate search window, where you can sort the records as you require.
- When **Automatically count results where possible** on the **File** → **Options** → **Search Options** tab is selected, and the user experiences delays with Content Manager returning their search results, turning off this option may improve performance
- The **Go Back** button executes the previous search result again and replaces the current search result
- Content Manager applies the default sort order and filters only to new searches, i.e. from the **Search** menu or the **Search** pane, but not, for example, to searches using the Location **Show**, or Classification or Hold **Show Records** commands
- The IDOL search engine is designed to return a fixed number of items. The default value for Content Manager searches that use the IDOL search engine is 100,000. The upper limit for MaxResults is 10,000,000. Any IDOL search or combined IDOL / metadata search that includes a Content query that exceeds the limit set by MaxResults may return inconsistent results.  
You can change this figure by changing the IDOL configuration files. In Content Manager Enterprise Studio Help, see the topic **Advanced configuration of OEM IDOL** about the parameter **MaxResults**. Setting the MaxResults value to the maximum may impact on the overall search performance of your IDOL and hybrid IDOL/Metadata queries.
- Saved Searches – due to the design changes made in the Search module in Records Manager 8.0, Saved Searches that have been created in TRIM 7.3x will not work in Records Manager 8.x and Content Manager after upgrading.  
A Saved Search Conversion utility has been added to the Administration menu in Records Manager 8.11 and is available in 8.11x or later. Administrators can run this utility to convert old versions of Saved Searches into the correct format for Content Manager. Depending on the complexity of the Saved Searches, the conversion may not be successful. In particular, Action Tracking saved searches and Communications saved searches are not converted the 8.11x or later version of conversion utility. Searches that fail to convert are left as “old format” searches in the system. It is recommended that organizations document their Saved Searches before upgrading.
- By design, when an existing Saved Search is overwritten, the Active Audit Log will show that Saved Search was Deleted and a new Saved Search is added.
- Record Number Range Search - the Record Number range search method is a string search and as such there is no validation on the numbers that are entered/selected in the To and From fields. The results returned from running a range Record Number search may be unexpected as there is no validation done on string searches.  
Workaround:  
When searching for a range of records using Record Numbers, use the **Expanded Record Number** search method (Numberx), this search method validates the numbers that are entered

into the To and From fields. It is also recommended that you use the KwikSelect on the To and From fields, rather than typing the numbers in.

- Saved searches that used IDOL specific query syntax are not supported when using Elasticsearch content index. IDOL keywords **IN**, **PARAPGRAPH** and **NEAR10** are not supported, e.g.:
  - Fiona IN MsgAttachment to match "Fiona" in Email attachments
  - Fiona PARAPGRAPH Dugong to match matching "Fiona" in the same paragraph of text as "Dugong"
  - Fiona NEAR10 Chris to match "Fiona" within 10 words of "Chris"

Additionally, explicitly using IDOL field names is not supported, eg {text}:DRECONTENT, but can be replaced with equivalent Elasticsearch field names (Content:text)

Saved searches created using IDOL specific query syntax must be recreated when moving to Elasticsearch content indexing.

### Report layouts

- The thickness of a line in a report layout can be controlled, but not the thickness of lines for rectangular boxes
- The option **Print Alternative Barcode?** in the report layout barcode item properties dialog box prints the expanded record number and therefore, applies only to record barcodes, not Location barcodes
- To print more than one page of notes or **Additional text Fields** for a record, a report requires them to be the last active item in the **Band Definition** list. Its height must be greater than 1 line so that it may automatically (dynamically) increase vertically to display all the data in the field.
- If the report layout contains more than one text field, for example, both **Notes** and an text Additional Field, the field text area in the report band may expand over other fields in the report, making them illegible. The issue does not occur for the last field in the report band or when the number of characters and/or the font size are small enough to fit all text in the text field area.
- Users in the same Content Manager session cannot open the same report more than once simultaneously
- Users in different Content Manager sessions, for example on different computers, can open and modify the same report. However, only the last modification saved is retained and the administrator will receive a mail notification informing them that the document store could be corrupted.

### Printing

- When printing items whose file type is set to **Bypass Viewer**, Content Manager does not display a confirmation dialog. When bypassing the internal Content Manager viewer, you are printing from the associated application. For example, when **Bypass Viewer** is selected for Word documents, clicking **File** → **Print** in Content Manager prints the document. When **Bypass Viewer** is not selected, the

viewer handles printing and Content Manager displays a confirmation message in case you have clicked **Print** by accident.

- Printing a specific page of a report is not supported in Content Manager. For example, if you are printing a large multi-page report and the printer has a paper jam, it is not possible to select a page or a range of pages to reprint. Instead, you need to print the whole report again.
- When you print a Word document or an Excel spreadsheet from Offline Records, Content Manager opens Word or Excel to print. The same behavior occurs when you right-click to print a Word document or an Excel spreadsheet from the desktop or Windows Explorer.
- Some documents may take longer to print than others, such as large graphic files, or produce corrupted print. For best printing results, use the original application for printing large and complex image files where possible. The Content Manager image viewing software is designed for generic viewing and does not produce the same viewing results as the authoring application.
- Printing reports - when selecting a different printer to print a report, Content Manager uses the same settings as for the previous printer. Known Windows limitation.
- Users may experience long delays when viewing or printing MS PowerPoint files from Content Manager. As a workaround, it is recommended that they add the MS PowerPoint file extensions, PPT and PPTX, to the **Bypass Viewer for these document types** option on the **Options - Viewer** tab.
- If the EML file type has been added to the **Bypass viewer for these file types** list (**Options - Viewer** tab) and the user attempts to print an EML type electronic document using the right-click **Send To - Print Document** option in Content Manager, it will fail to print.  
Workaround: Remove EML file type from the **Bypass viewer for these file types** list, or open the EML document in its native authoring application and print from there.

### Content Manager viewer

- When viewing PPTX file in Content Manager Viewer where PPTX document content format changes when previewing in Content Manager Client or printing PDF rendition.

#### Workaround

Add the **GraphicFontScale** parameter under **Options** section in the **formats.ini** located in the Content Manager install folder (e.g, C:\Program Files\Micro Focus\Content Manager\and restart the Content Manager client.

For example, GraphicFontScale=0.5

- KeyView provides different levels of support for different file formats:
  - Viewing
  - Filtering (the ability to extract text)
  - Exporting (the ability to convert the file to HTML or XML format)
  - Metadata extraction
  - Detection (ability to detects its format)

Not every file format is supported for every level. This is a known limitation of a third-party product.

To use a localized version of the viewer, users should have the permission **Full Control** to the Windows **Program Files** folder.



- When an email message contains information that is stored in a location inaccessible for the Content Manager viewer, for example a signature on a secure Internet site, Content Manager viewer may not be able to display the entire message, and cannot apply retention business rules or store the remote part of the message.
- Unicode file names were handled incorrectly when performing text extraction from preview and View (**517108**).

### Document Preview

A record that has an attached electronic document that is over 25 MB in size will not be automatically displayed in the View pane **Preview**, **Previous** or **Rendition** tabs on a record search results window for performance reasons.

### Workaround

If a user wants to preview the current rendition of the document, they can right-click on the record and click **View**.

If a user wants to view a rendition or previous revision of the document, they can right-click on the record and click **Properties**. On the displayed **Properties** dialog, click on the required tab e.g. Revisions or Renditions and then view the document.

### Statistics reports

- Actions deleted from Content Manager that were attached to a record before remain in the **KwikSelect** → **Action** name list
- Record statistics reports cannot generate or export statistics if Microsoft Excel is not installed on the computer.  
Microsoft Excel components are used to export the statistics report details.

### Action tracking

- Assigning a Procedure with a **Start Date** may generate a **Start date must not be before** message if the regional settings on the PC have the time set for 12 hour time but no designation for AM or PM.
- When attaching an Action to a record with the option **After any Existing Record Actions for this Record**, Content Manager will start this Action after the completed Actions' **Due** date, not their **Completed** date.

### Dates

- Content Manager supports any valid Gregorian date, back to the year 100.  
Content Manager converts years from 30 to 99 to a four-digit year in the 1900s, and a year from 0 to 29 to a year in the 2000s.

### Barcodes

- Foreign barcodes that contain non-printable characters are not supported, for example, tab etc.
- If a user does not have **Can Use** access to a particular Location, they will not be able to change the record's Assignee Location using a barcode scanner

## Thesaurus

The Content Manager Thesaurus has been designed to follow the recommendations of ISO 2788 - Guidelines for the establishment and development of monolingual Thesauri.

While every term may have as many narrower terms as a user may require, a well-designed Thesaurus will have an appropriate number of subordinate terms, typically to a maximum of 10 to 15 terms.

- Thesaurus terms cannot contain hyphens (-).

## Currency and language

- The default currency symbol set in the **System Options** → **Currency** tab only allows one system-wide default to be set up
- French **Date Received** Additional Field and checking in email - when checking in an email message, the **Date Received** Additional Field of type date or date/time will be populated under all available language variations. However, for the French version of **Date Received (Date de Réception)**, the accent must be used in the label of the field for it to function.
- Changing the caption of a field in Content Manager changes it in all interface languages

## Tagging and dragging

- If you are performing a task on some tagged records which causes some of the tagged records to no longer fit the search criteria for the window, then press **Refresh** before performing any additional tag processing, for example, reporting, retention etc.
- Dragging messages to a linked folder in Outlook - Content Manager may not automatically process large numbers of items when dragged to a linked Outlook folder.  
When a mail message is added to a Linked Folder in Outlook, an event starts.  
There is a limitation on the number of items that can be dragged to a folder in Outlook and still start this event, they may not all be checked in to Content Manager and error messages may not appear. The items will, however, be added to the selected folder.  
When there are unprocessed items in a linked folder, it is recommended you use the **Clear All Backlogs** option, to process the unprocessed items in all folders, or **Clear Backlogs** to process just the items in the selected folder. These two clear options are accessible from Check In Styles panel in Outlook.
- When dragging and dropping an email onto Content Manager a different MSG file is produced compared to those that are checked in via the Outlook integration. As a result, if the **Check for duplicate email messages** option is enabled, a warning will not be displayed if an email is checked in twice but via different check in methods.
- When a user drags and drops the same document in quick succession, if the **Record Type** has the **Behavior for Duplicate Titles** set to **Display Warning** or **Prevent**, the warning/error stating that there is a duplicate titled record will not be displayed as Content Manager has not completed the Word Indexing for the first document. The user must wait for the first document to be indexed before a duplicate title check will work.

## Interface

- Some field values appear differently depending on whether they are in a column or in the **View** pane. This is because of the differing amount of space available to display the values.
- Custom toolbar icons – Content Manager does not support the creation of user drawn toolbar icons. A wide selection of predefined icons is available.
- Status bar - staff name display - in online mode, the staff name is obtained from the Location's display name. In offline mode, the staff name is obtained from a Location's network login.

## Locations

- It is recommended to limit the number of staff members allocated to work areas or units to 80 to 100 at each level which enables Content Manager to sort, display and refresh the screen at an acceptable performance level.  
If the number of Locations exceeds this guideline, customers should enable the Content Manager system option **Administration** → **System Options** → **Object Cache tab** → **Optimize Performance of** → **Location Member Of Relationships**.
- Special characters in Location names limitations:
  - The percentage character (%) is supported, but may cause some inadvertent search results in Location searches
  - The asterisk character (\*) is supported but may cause confusion as it is used as a wildcard search character
- Location properties **Associations** tab – Content Manager does not support changing the order of **Member Of**, **Supervised By** and **Delegate Of**. The **Move Up** and **Move Down** options are only available for the **Has Members**, **Supervisor Of** and **Has Delegate** items.
- Default Location cannot be changed to regular – in the Location properties **Associations** tab, when an association type has only one Location, Content Manager makes it the default. To change its status to regular, make another Location of the same association type the default first.
- User cannot choose between multiple email templates for the same mail event type – if there are multiple email templates for the same mail event type, Content Manager will use the first one according to its name to create an email notification for the event. Users cannot choose the one to use. Workaround: Create only one email template per event.

## Alerts

Due to the design changes made in the Alerts module in Records Manager 8.1, Alerts that were created in previous versions of Content Manager and TRIM are removed as a part of the upgrade process and will need to be manually redefined in Records Manager 8.1 after upgrading.

It is recommended that all Alerts are reviewed and documented before upgrading to Records Manager 8.1. This will assist you in recreating the Alerts after upgrading.

## Child Lists

A limit of 100 items applies when creating child lists, for example, a warning will be displayed if more than 100 Contacts are added to a record. The exception to this limitation is the record Relationships,

e.g. Related To, Parts etc. child list, where the total limit is 1000 items, but only 100 items can be applied in a single transaction.

## Desktop integration

- Password protected files - password protected files (that is, the password added in authoring application) are not supported. Password protection can cause problems with several facets of Content Manager operations.

**NOTE:** Deactivating password protection does not necessarily reduce the security problem because a prime purpose of a professional enterprise content management system is to provide storage, retrieval and security for all registered files.

## General

- Unlocked files - apparent check in discrepancy - certain applications do not lock files when in use, for example, WinZip, which means in turn that Content Manager cannot determine whether the file is in use.  
In certain circumstances, for example, when a user modifies a \*.zip file after it has been checked back in - see steps below, this may result in multiple copies of the file.  
Where applications do lock documents in use - for example, Word - check in is disallowed in Offline Records.  
For example:
  - a. Right-click and select Edit to edit a \*.zip record, for example, Test.zip, which checks out the document for editing using Content Manager Desktop.  
Content Manager automatically checks the document back in when you close the document or authoring application. Before modifying the document or closing the application or document, open Offline Records standalone and check in the \*.zip file
  - b. In the authoring application, modify the \*.zip file
  - c. Close the document and authoring application.  
The record in Content Manager has the original document with the original contents and a new draft document has appeared in Offline Records with the modified content.  
This is the same behavior as when you delete a \*.zip file from Windows Explorer while editing the .zip file using WinZip.
- Checking in multiple documents using right-click **Send To** from Windows Explorer may result in the Windows error message **Windows cannot access the specified device, path, or file. You may not have the appropriate permissions to access this item.** - known limitation caused by Windows, not limited to Content Manager.  
Workaround: Send smaller file groups instead.
- Document queues – sub-folder processing not supported. The document queue processor does not process items in sub-folders. Instead, you will need to create a separate queue to process this folder.
- Keyboard shortcuts for Microsoft Office 2010 applications other than Word and PowerPoint may not work as expected when integrated with Content Manager. This is due to limitations of those Microsoft Office applications.

- When Content Manager is integrated with MS Office and MS Outlook, whether using the client integration or using the Thin Office integration, by default a folder is created in the local user directory **C:\Users\\Documents\OpenText CM**. If this directory has its security locked down for users they cannot save records through the integrations.  
Workaround: In the Office Integration's **Preferences** file, which is added to the **C:\Users\\AppData\Roaming\Micro Focus\Content Manager\OfficeIntegration** directory when the Office integration is opened, there is a property called **MyDocumentsFolder**. If a value is defined for this property, it will be used as the root path for the CM folder. If the property has no value, then the user's **My Documents** folder will be used.  
The properties of the Preferences file can be defined and the file installed as a part of a network installation process for Content Manager.

### Offline Records and Content Manager Desktop

- The option **File > Options > Search Options tab > Automatically view electronic documents** is not supported for Content Manager Offline Records.
- Offline Records in offline mode and **Container** icons - when a user checks out a container record to Offline Records, the record uses the icon of the Record Type at the time of checkout. If the icon changes in Content Manager, it is not reflected in Offline Records until the record has been checked back in and then back out to Offline Records.
- Offline Records file path lengths – maximum lengths supported by applications - different versions of Office and other applications have different file path length limits. When a user saves a document in Offline Records, the maximum number of characters is determined according to the application limit. The document name will be truncated at whatever it needs in order to not exceed the applications total file path length limit. For example in Excel, the file path length is set at 201 characters including the full Offline Records path, such as **C:\Documents and Settings\user\My Documents\Offline Records (03)\folder name\document name.xls**.
- AutoCAD 2005 - when an AutoCAD 2005 file is saved to Offline Records by clicking **My Offline Records** in the **Save In** box, double-clicking Offline Records does not open Offline Records. Workaround: Click the **Save** button to first open Offline Records and then the file can be saved to Offline Records.
- Offline Records and **My Documents** folder set as a shared folder – it is not recommended for organizations to configure their environment so that the **My Documents** folder is a shared network resource, as Content Manager Offline Records will not work as designed, which is as a resource when there is no network access
- Offline Records and Microsoft Word file names - in MS Word, the file names include the path as part of the file name and are limited to 256 characters. This is a MS Word field length limitation. Therefore, when you attempt to save a file using Offline Records and you make the file name too long, Word truncates the name to fit the 256-character limit.
- Upgrading of an older version of the **TRIMTD.mdb** file is not supported
- When you apply global settings, Content Manager resets offline folders to system default settings

**MS Office**

**Microsoft Office client add-in functionality**

You can use Content Manager add-ins in Microsoft Office applications. The tables show the applications and the Content Manager add-in commands they support:

<b>Office 2013 SP1(32-bit and 64-bit)</b>				
<b>Feature</b>	<b>Word</b>	<b>Excel</b>	<b>PowerPoint</b>	<b>Project</b>
Open	Yes	Yes	Yes	Yes
Save, Save As	Yes	Yes	Yes	Yes
Record Properties	Yes	Yes	Yes	Yes
Make Final	Yes	Yes	Yes	Yes
Insert Picture	Yes	Yes	Yes	No
Insert Object	Yes	Yes	Yes	No
Insert Text from File	Yes	No	No	No

<b>Office 2016 (32-bit and 64-bit)</b>				
<b>Feature</b>	<b>Word</b>	<b>Excel</b>	<b>PowerPoint</b>	<b>Project</b>
Open	Yes	Yes	Yes	Yes
Save, Save As	Yes	Yes	Yes	Yes
Record Properties	Yes	Yes	Yes	Yes
Make Final	Yes	Yes	Yes	Yes
Insert Picture	Yes	Yes	Yes	No
Insert Object	Yes	Yes	Yes	No
Insert Text from File	Yes	Yes	Yes	Yes

<b>Office 2019 (32-bit and 64-bit)</b>				
<b>Feature</b>	<b>Word</b>	<b>Excel</b>	<b>PowerPoint</b>	<b>Project</b>
Open	Yes	Yes	Yes	Yes
Save, Save As	Yes	Yes	Yes	Yes

Record Properties	Yes	Yes	Yes	Yes
Make Final	Yes	Yes	Yes	Yes
Insert Picture	Yes	Yes	Yes	No
Insert Object	Yes	Yes	Yes	No
Insert Text from File	Yes	Yes	Yes	Yes

**General**

- Set GPS location - There is a known Internet Feature Control issue with loading the Google Maps API from Microsoft Office and Outlook. To resolve this issue and be able to set the GPS location for a record or a location using office integration, you need to create the following DWORD (32 bit) registry keys with the decimal value **69633** at the location **\\HKEY\_CURRENT\_USER\\SOFTWARE\\Microsoft\\Internet Explorer\\Main\\FeatureControl\\FEATURE\_ BROWSER\_EMULATION:**
  - excel.exe
  - OUTLOOK.EXE
  - powerpnt.exe
  - winproj.exe
  - winword.exe
- For Microsoft Office 2013, if you have added the **Content Manager web server URL** from **System Options > Web services** page and trying to drag and drop a Content Manager record with electronic document using the right mouse button to any of the Office 2013 application does not give you **Move, Copy or create Hyperlink Here** options.
- Default file types for integrated Microsoft Office applications
  - Excel - uses the default file type set in Excel when it is **xls, xlt, xlsx, xlsm, xlsb, xltx, xltm**. When the default is different, Content Manager uses a default of **xlsx** in for Excel 2013 and 2016.
  - Word - uses the default file type set in Word when it is **doc, dot, docx, docm, dotx, dotm**. When the default is different, Content Manager uses a default of **docx** for Word 2013 and 2016.
  - PowerPoint - **pptx** for PowerPoint 2013 and 2016
  - Project - **mpp** for all versions
- Conflicts of Content Manager Microsoft Office add-ins with 3rd party add-ins – Content Manager Office add-ins with the Office **File – Close** and **File - Save** commands. While OpenText does not anticipate conflicts, nor have received reports of conflicts, there is a theoretical chance that a 3rd party add-in that also works with these commands may conflict with the Content Manager add-in.
 

The Content Manager Office add-ins for MS Office 2013 and onwards do not work with these commands, as they uses a different operating model. As a result, the chance of conflict is reduced.

Customers should thoroughly test their add-ins in operation with Content Manager add-ins to identify possible issues before running the add-ins in a production environment.

Workaround when conflicts arise: By using an MS Office custom property, users can turn the

Content Manager add-in for the MS Office applications Word, Excel, PowerPoint and Project on and off, depending on when they need to use the add-in functionality. For instructions, see the Tech Note at <https://softwaresupport.softwaregrp.com/km/KM00640635>

- In an Windows 8+ environment, printing Content Manager records (electronic documents) can only be done from the MS Office authoring application **File > Print** menu options. If a Content Manager document is being viewed in the Content Manager Office integration **Open** dialog, printing using the Content Manager **Print Document** option is not supported.
- Documents checked into Content Manager from MS PowerPoint or MS Project will appear in the application's native Recent documents list even though they have been removed from the users hard drive. If selected, the user will see a native message.  
In MS Word and MS Excel the file names will not appear in the native application's Recent documents list.  
Workaround: To access a Recent Document that has been checked into Content Manager, the user can open it from the native application's **File > Open > Content Manager > Recent Documents** option.
- Dragging and dropping documents directly from Content Manager into other applications, for example Trapeze, is not supported.

#### Compound documents

- Compound documents and email – Content Manager does not detect compound documents when checking in from supported email clients MS Outlook
- Compound document renditions – the Renditions function does not recognize compound documents that are record renditions
- Broken links when viewing – after check in, compound document link is broken when viewing in Word or the browser plug-in - Windows limitation
- When a user checks out a document to Offline Records and then edits the actual document, not the link, checks in the document using the **Replace Current Revision** or **Make a New Revision** commands and then right-clicks it and views the document using the associated application - Word - or the browser plug-in for the viewer, the link reads **Error! not a valid link**. If the viewer is the Content Manager viewer, the link works correctly, as Content Manager does not alter a document.  
In Microsoft Word (**Edit > Link**), the link appears as incorrect because it is pointing to the path to Offline Records, rather than to the folder where the document actually is.  
When you first check out the document and open it, the **Edit > Links** function in Word displays the path to the folder where the container document is - the Offline Records folder. When you edit or update the link, it displays the correct folder path.  
If, however, you make changes to the container document and do not edit the link, Content Manager uses the local Offline Records path when you check the document back in, rather than the folder path.
- Excel spreadsheets in Word documents – in Word, when trying to save the document while the Excel spreadsheet is active, an error message may appear. This is due to the way Microsoft Excel add-ins operate.  
Content Manager does not detect that Word is the parent application until the user deselects and then reselects the Excel object.



- Compound documents with broken links - if the path to a linked document does not exist or is not resolvable, Content Manager does not detect a link at all.  
If Content Manager cannot read the linked document, the link defaults to **External To Content Manager**.

### MS Excel

- Excel and date formats - when opening and re-saving tab delimited or comma delimited files into Content Manager using Content Manager integration, ensure that date fields are set to **Text** format to avoid Excel ignoring the date format of the operating system and using US date format.  
You can find more information in the Microsoft Knowledge Base article explaining Excel's handling of date formats: <http://support.microsoft.com/kb/214233>
- Excel **Share Workbook** function – Content Manager supports editing of a shared workbook only when the workbook is checked out of Content Manager to Offline Records or edited as supercopy.  
Using the **Edit** option in Content Manager does not check out the workbook. To edit a shared workbook use the **Check Out** and **Check In** options.
- Multiple installed Excel add-ins on one computer are not supported • Microsoft Excel will not allow a custom menu item like the Content Manager **Save**, **Save As** and **Open** commands be used if there is a change made in a cell and the user has not committed the change by moving out of the cell.
- Excel and Project document's - the local file does not get deleted when application is closed using **X** button:
  - If you close the application using the **X** button, the leftover local file will not be deleted from the Offline/Microfocus Content Manager folder.
  - In case multiple Content Manager documents are opened in office application and you close the application using **X** button then all the leftover files will be deleted except for the last one. The leftover files are deleted when the file is closed using the **File > Close** menu option.
  - When you start the office application again, the add-in deletes the leftover files.

### MS other

- Microsoft Binder - Content Manager cannot document content index text within Microsoft Binder files

### Thin Office Integration

- Microsoft Project – selecting an existing Microsoft Project Template (.mpt) file using the **Open** option will cause a new project to be created based on the selected template, rather than opening the template file for editing.  
This follows the native behavior of Microsoft Project which does not support editing an existing template file.

### Zero Foot Print Office integration

- With the Zero Foot Print Office integration, particularly Excel and PowerPoint, if the user clicks on the **Save** button multiple times without changing the content, then the record revision may be incremented in Content Manager.

This occurs because Microsoft 365 changes the metadata associated with the document giving the impression that the document has changed which causes the increment to the record revision. With the available APIs from Microsoft we cannot reliably tell if the document content or just the metadata has changed. This behavior will be reviewed in a future release.

- If user searches for records and without clicking a specific record, clicks on **Open** button, it opens earlier selected record (**732073**).

### MS Teams

- Checking In more than 75 records - Application throws a **Request failed with status code 404** error when you try to Check In more than 75 records.
- Select All with filter In Content Manager - If you have selected **Select All** option with **In Content Manager** filter and click on a folder where the files within that folder are not checked in at all, then a **Cannot read properties of null (reading 'Name')** error is displayed.
- Same record number and incorrect record revision - For the chats, when you select **Select All** option to check in multiple files, then after checking in, the records display same record number with incorrect record revision (**741118**).

**Workaround** - Refresh the page to see the correct record number and revision.

- Search throws an error if user does not have access to some of the object(s) (**712084**).
- Filtering MS Teams content using **Not in Content Manager** option is not working as expected (**722033**).
- Visual indicator shows that server side filing is enabled for all datasets even though it is enabled for just one dataset (**712099**).

### Mail messaging systems

The email format checked into Content Manager is dependent on the integration being used. The email formats captured are what the mail system can provide:

Email Integration	Captured File Format
Outlook integration	MSG
Thin Outlook integration	MSG as the native file output from MS Outlook
EmailLink integration	EML as there is no MS Outlook interaction to convert to MSG

- Embedded email messages are treated as attachments in Content Manager. Content Manager considers email messages that are embedded in an email message to be attachments.

- Date sent details - date sent information is stored for Extended MAPI compliant applications. Simple MAPI does not provide send date information.
- Email and BCC recipients - it is possible for an email message to be sent that only has **BCC** recipients.  
In some cases, this can result in the email not actually being delivered because some SPAM filters will not permit email in where the only recipients are **BCC** addresses.
- Microsoft Exchange support – while Content Manager does not work directly with Microsoft Exchange, testing does include Microsoft Exchange and Outlook versions supported by Microsoft. However, as there are several versions of Microsoft Exchange and Outlook, as well as many possible Content Manager configurations, it is highly recommended that before upgrading your Microsoft Exchange servers, you undertake thorough testing in your software environment to ensure there are no issues.

**Microsoft Outlook**

**Microsoft Outlook client add-in functionality**

Function	Microsoft Outlook (32-bit) 2013 SP1, 2016	Microsoft Outlook (64-bit) 2013 SP1, 2016
Checking in to Content Manager	Yes	Yes
Checking in automatically from folder	Yes	Yes
Checking in on send	Yes	Yes
Content Manager email notification	Yes	Yes
Content Manager File/Send	Yes	Yes
Content Manager mail messageform/send	Yes	Yes
Attach Content Manager record to new message	Yes	Yes

- Outlook linked folders –
  - **Dragging an email to linked folder** - the Outlook integration has a known limitation on some mail servers which causes an error when dragging an email to a linked folder.
  - **Sent Items folder** - it is not possible to make a link to the Sent Items folder to capture all outgoing messages.

The **Sent Items - Content Manager** folder is linked as a managed folder internally by the Content Manager Outlook integration. It has unique functionality for items that are added to its collection. The user can selectively check in an item sent by them rather than all items sent from their account. This will avoid noise emails from being checked into Content Manager, giving users the control to selectively add their mail to Content Manager.

If all items sent from an account are to be checked in, we suggest using an **Inbox** rule that copies them from the **Sent Items** folder to another folder which can be linked to Content Manager.

- Outlook - Content Manager **Send To** and signature blocks - there are many instances where the signature block is not included in an email, for example, **Explorer > Send to > Mail Recipient or Word > File > Send to > Mail Recipient**. This is due to the function requesting a blank Outlook form. To resolve this, when the form appears, choose **Insert > Signature**.
- Date and time properties of the actual email sent or received differ to those displayed in the Content Manager viewer. Content Manager rounds down the time to the nearest minute, while Microsoft rounds up to the nearest minute. Therefore, the email time details in Content Manager will differ from the actual email time by a minute.
- Outlook email messages and document content indexing - when you check in an email message that was saved locally in **.msg** format or embedded emails sent to Offline Records, Content Manager saves them as **.msg** files in Content Manager format. Content Manager indexes their content if that functionality has been applied to their Record Type.
- Outlook **Send To** option - when Content Manager in Outlook is enabled and a user selects **Send To** from another application, the message will be in the Outlook Outbox until **Outlook** is opened and the mail client is connected to the server.
- **Check in on send** is not supported when the Outlook option **Save Sent Items** is not selected.
- As Microsoft does not store the message id on sent Outlook items, items that are checked in on send are not checked as duplicates if the **System Option - Email Records** tab - **Check for duplicate email messages** is enabled.
- **Simple MAPI** is not supported for Outlook
- Outlook and Avaya Unified Messenger – the Avaya Unified Messenger and Content Manager In Outlook add-ins co-exist in Outlook; however there is no Content Manager interface with Unified Messenger itself. That means, when using Unified Messenger, there is no Content Manager functionality available.
- Outlook - managing Content Manager linked folders and public folders on the Exchange Server – when you have multiple users linked to the same public folder on the Exchange Server and to the same Content Manager database then when one person drags an email to the linked folder, all the users that have that folder linked will see the same dialog boxes as the person who is checking in the email message.
- Outlook public folders known limitation - at times, an automation error may occur when attempting to check in from a public folder **Inbox**. However, when you open the email first, you can check it in without the error.
- If the SQL database does not allow for Unicode characters, then after checking in an email message, Content Manager replaces Unicode characters in the email subject line with other characters or question marks (?).
- The Outlook 2013 setting **Cached Exchange Mode** affects the MAPI document browser. When the setting is not selected, Content Manager document queues of type **Extended MAPI**

**Folder** do not display or process the email messages in the **Process Document Queue** window folder when clicking **Process** to process the queue.

**Workaround:** In Outlook **Account Settings**, double-click the account. Under **Offline Settings**, if you need to keep **Cached Exchange Mode** selected, use the slider to change the setting for **Mail to keep offline**.

Content Manager processes all the mail that falls within the period selected here.

- Email items that have their Sensitivity set as Private and are checked in using the Content Manager Outlook Integration are unable to have their subjects modified and will not have CM prepended once they've been checked in. This cannot be rectified. A message will be in the log describing the behavior:  
 "Information: Unable to change the subject of a checked in item. This item's subject will not be suffixed with CM. Details: The object does not support this method."  
 All other Sensitivity types (Normal, Personal or Confidential) should be prepended with CM:  
 Subject
- In Cached Exchange Mode, items that are marked Check in on Send will be checked into Content Manager without a Message ID. This behavior is due to Exchange saving a copy of the email that has not yet had an Internet Message ID assigned in the **Sent > Content Manager** folder in MS Outlook.  
 If a recipient of this email checks in the received message and Content Manager is checking for duplicate email messages, it will not trigger the duplicate warning, as the Message ID is used to determine duplicate emails. Subsequent recipients will not be able to check in the email as the email will have been assigned a Message ID.
- Users that are using multiple Outlook environments must ensure that their profile name matches in all environments otherwise their Linked Folders will not work correctly.  
**Workaround:** Users will need to re-create their Outlook Profile on the machines it does not match on.
  - Close Outlook, open **Control Panel** and select **Mail**.
  - When the **Mail Setup - Outlook** dialog opens, select **Show Profiles...**
  - Remove the profile that is not correctly named, click **OK**.
  - Open Outlook.
  - The **New Profile** dialog will display, enter the correct name of the profile and click **OK**.
  - The **Add Account** wizard will appear. Set up Outlook.
  - When Outlook opens, select **Content Manager > Check In Styles**
  - The list of Check In Styles will display. Any Linked folders that display an incorrect profile in the **Outlook Folders** list will need to be removed and re-added to the Check In Style.
- Outlook integration on Surface Pro - the **Clear backlog** and **Clear All backlogs** buttons are not visible.  
**Workaround:** change the scale and layout display settings on your system.
  - Navigate to **Start menu > Settings > System > Display > Scale and Layout > Change the size of text, apps and other Items** and select **125%** from the drop down.
  - Click **Advanced Scaling Settings** and turn on the **Let Windows try to fix apps so they're not blurry**.

### Thin Outlook Integration

- When a new Appointment item is created in MS Outlook, the **Check In on Send** and **Style** options are not available as an Appointment cannot be sent. If the Appointment is changed to a Meeting item by adding an attendee, the Content Manager tab options will not be refreshed to include the Style options.
- The option, **Check In on Send**, is not available on a Meeting item due to a Microsoft limitation.
- Meeting items are not automatically deleted regardless of the **Delete after check in** setting on the **Check In Style** used.

### Content Manager DataPort

- See Content Manager DataPort Help for a list of objects that are supported for import and export
- Numbering from container - the container must exist in the database before importing the record that gets its number from the container. If you have an import source that contains both the container and the record and the record is in either the same batch or an earlier batch than the container, the batch of records containing that record will not be imported.
- There cannot be hyphens (-) in Thesaurus terms. If you have a Thesaurus that contains terms with hyphens in them, modify the import file and replace the hyphens with another character before importing, for example, underscore (\_).
- Location associations – DataPort exports associations in a one-way relationship only
- DataPort does not export associated members because Locations of type Organization may have many thousands of members
- DataPort requires **Integrated Windows Authentication (Active Directory)** to be enabled as the dataset authentication method. If the dataset uses **Explicit Windows Authentication** as its authentication method, Content Manager DataPort will not work.

### Content Manager Enterprise Studio

- When running the Content Manager Workgroup Server as executable file on a computer using Windows Vista or later, User Account Control (UAC) may cause the message **A request to the Content Manager Workgroup Server <name> failed: Function request <name> for Content Manager Workgroup Server <name> failed. Failed to setup a shared memory space for the file <path>. Access is denied. Running as user <name>**. and the operation may fail.

**NOTE:** Not relevant for normal Content Manager operation, when the Content Manager Workgroup Server runs as a service, not as executable.

**Workaround:** Turn off UAC before running the Content Manager Workgroup Server as executable file.

- Time coordination - the Workgroup Server coordinates date and time details between the client computers and the Content Manager Servers.  
It also prevents Content Manager updates when the clock is more than 10 seconds different.

This would indicate that someone has manually changed the clock on their local computer while logged into Content Manager. If this is the case, they will need to log out and then log back in again to re-synchronize with the network clock.

If your system clock date does not match the server date, your Workgroup Server access will be denied.

Manually changing the time on the Workgroup Server causes it to stop processing events.

- Enterprise Studio does not report that the IDOL content index is full.
- The Content Manager Workgroup Server throws an error if TLS 1.3 is exclusively enabled for Microsoft Windows Server 2022 (**618147**).

## Content Manager Mobile App

- Record Property (Add property), adding and removing a record properties is not working as expected (**681046**).
- User is redirected to Microsoft login screen, after completing the sharing process on Mobile App (Android only) (**650073**).

## Content Manager Image Scanner

- Content Manager Image Scanner applies the last used scan settings by default, regardless of the settings in any third-party scanning applications. This behavior is by design and consistent with other professional business applications.

## Content Manager Render

- When you attempt to use rendering on a file and a dialog box appears in the file's authoring application, for example, asking for user details, rendering may fail.  
Workaround: Open the authoring application and answer the questions in the dialog before using it with Content Manager Render.
- Rendering of .chm files to redactable or long-term renditions is not supported
- Rendering may fail with the error message **Failed to render document. Print job cancelled.** when the value for the setting **Timeout Waiting for Result** is too low, as rendering of some file types may take longer.  
Workaround: In Content Manager Enterprise Studio, right click on the affected dataset, point to **Event Processing** and click **Rendering**. The **Configure Rendering** dialog will appear. Click the **Settings** tab and set the **Timeout Waiting for Result** value to 180-300. **Save** and **Deploy** the configuration file, and then restart the **Content Manager Workgroup Service**.
- Printing a VMBX file converts the file to a HTML file and then attempts to print the HTML file. To be able to render a VMBX file, you must have an application registered to handle printing HTML files.
- Known issue: Rendering a MSG file to PDF or TIFF may fail with the error message **Print job did not start with in the expected time interval.**  
Workaround: Ensure that Outlook is not installed on the Render processing machine.

- Known issue: When printing or Rendering an Excel spreadsheet from Content Manager only the first sheet will be printed/rendered. This may be an issue if you want a representation of the whole document, such as a Long Term Storage rendition. This is the default behavior when printing an Excel document from Windows Explorer.  
Workaround: see [Setting Printing defaults for Excel Spreadsheets to enable them to be rendered](#) for a workaround. Please note, this workaround will affect printing Excel spreadsheets from Windows Explorer.

## Content Manager Web Client

- Web Client supports drag and drop of **.msg** file either directly from Outlook or from the desktop. However, the functionality is limited to Chrome and Microsoft Edge browsers.
- When searching for records by using a phrase that contains special characters like parentheses like [( )] or colons (:), you need to leave them out in the case of the parentheses, or escape them by using double inverted commas around the entire phrase in the case of a colon.  
Examples: To search for a record with the title Report (2007) or Report [2007], use: **title: report 2007** To search for a record with the title report: 2007, use: **title: "report: 2007"**
- During the record creation process, when a MSG file is attached or dragged onto the record entry form, the Date Created field is removed from the form. This is due to a technical limitation that prevents client side applications from extracting date related metadata, such as the Date Created, from a MSG file. However, when the file is sent to the server and finally attached to the newly created record in Content Manager, the date related metadata (Date Created) can be extracted and is appropriately specified on the record.
- Due to the requirement to have Automatic Logon with current user name and password authentication enabled, the WebDAV **Check out and edit** option does not support Guest account access to the Content Manager Web Client. All users must have a valid Windows Domain account that can automatically authenticate to the Web Server.
- When searching for Content objects by a Date search method using the Web Client, there is no client side validation done on the field. This is to allow for more flexible search options such as This Year, Last Week, Today. If a user types in invalid values into a Date search method, Content Manager will try to retrieve the objects based on the entered values.  
Workaround: Use the Calendar option to select a correctly defined date format.
- The **Check out and edit** option, which uses WebDAV, is not supported when some form of load balancing is employed to distribute requests between multiple instances of the Web Client running on different machines.  
The WebDAV feature stores the user's working copies in a WebDAV share located on the Web Server at URL /CMWebDAV/DAVDir/ and all requests made to that URL must resolve to the same WebDAV share on the same physical machine so that the user can save their work temporarily and resume editing it before committing changes. This cannot be guaranteed when using a load balancing configuration.
- The WebDAV **Check out and edit** option does not work when using ADFS for Web Client Authentication. The WebDAV implementation in IIS relies upon Windows Authentication to identify the user and does not have the ability to forward authentication requests to ADFS to determine the user's identity. If you are using ADFS for Web Client Authentication, **do not** configure the WebDAV **Check out and edit** feature as described in **CM23.3\_WebClient.pdf**



- If Reference files (.TR5 files) that included a Web Client Classic link as the WebURL were generated in TRIM/Records Manager versions 7.3x or 8.1x, these WebURLs will not open in the Web Client after upgrading to 9.0x or above versions. A similar issue applies to Reference files that included a WebDrawer link as the WebURL in TRIM/Records Manager versions 7.3x or 8.1x, these WebURLs will not open in WebDrawer after upgrading to 8.2 or above versions. These limitations are due to the changes in the structure of the WebURLs, and the obsolescence of Web Client Classic.
- The requestFiltering doesn't allow more than 2GB maxAllowedContentLength, this leaves the upper limit of file upload to 2GB. Since this value is constraint by ASP.NET, the size of DOS file upload in the Web Client should be less than or equal to 2GB. For more information, please see: <https://blogs.msdn.microsoft.com/friis/2013/06/19/uploading-large-file-to-iis-7-5-or-8-using-file-input-element/>

## Content Manager WebDrawer

When copying and pasting a URL from WebDrawer, or the Web Client, into an Office 2013 or lower version application, an error will occur when clicking the hyperlink in Office due to a known Microsoft limitation.

### Workaround:

Apply the fix described in

<https://support.microsoft.com/en-au/help/218153/error-message-when-clicking-hyperlink-in-office-cannot-locate-the-inte>

## Content Manager Workflow

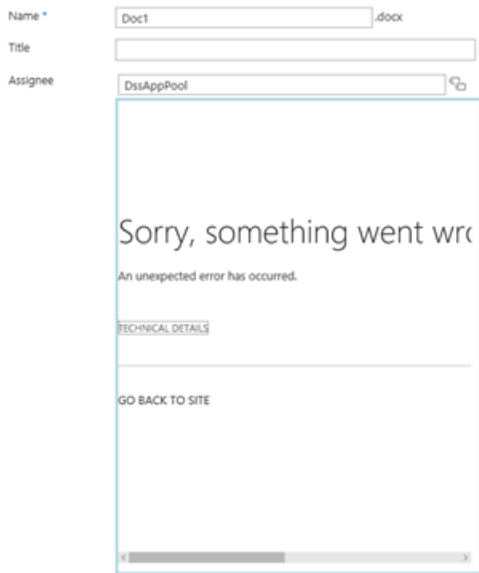
- A sub-process must have at least two sub-Activities. When there is just one Activity, Content Manager deletes the Activity and the sub-process.
- When a Workflow template that includes document placeholders is exported from, and imported into, a Content Manager dataset, the document placeholders are not transferred. The required document placeholders will need to be manually added to the Workflow template after it has been imported.
- When you open a Workflow in the Workflow editor and close it without making any changes to the Workflow, the Content Manager displays Save dialog asking whether you want to save the changes to your workflow.

## Content Manager for SharePoint Integration

### Columns that use custom behavior

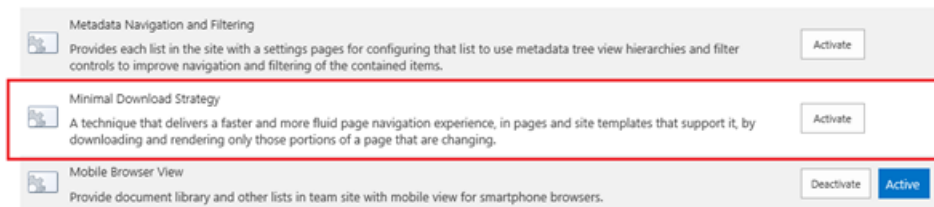
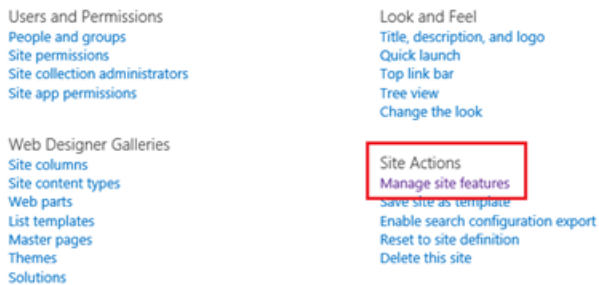
The following only affects an on-premise installation of SharePoint 2013, 2016 and 2019, it does not apply to SharePoint Online.

If the following error is seen while trying to select a new value for one of the Integration columns:



Then either refresh the browser page or de-activate the **Minimal Download Strategy** feature at **Site Settings > Manage Site** features:

## Site Settings



## Content Manager for IDOL

### Content Manager security options for IDOL with OGS

The following security options are not implemented in the IDOL/OGS security mapping:

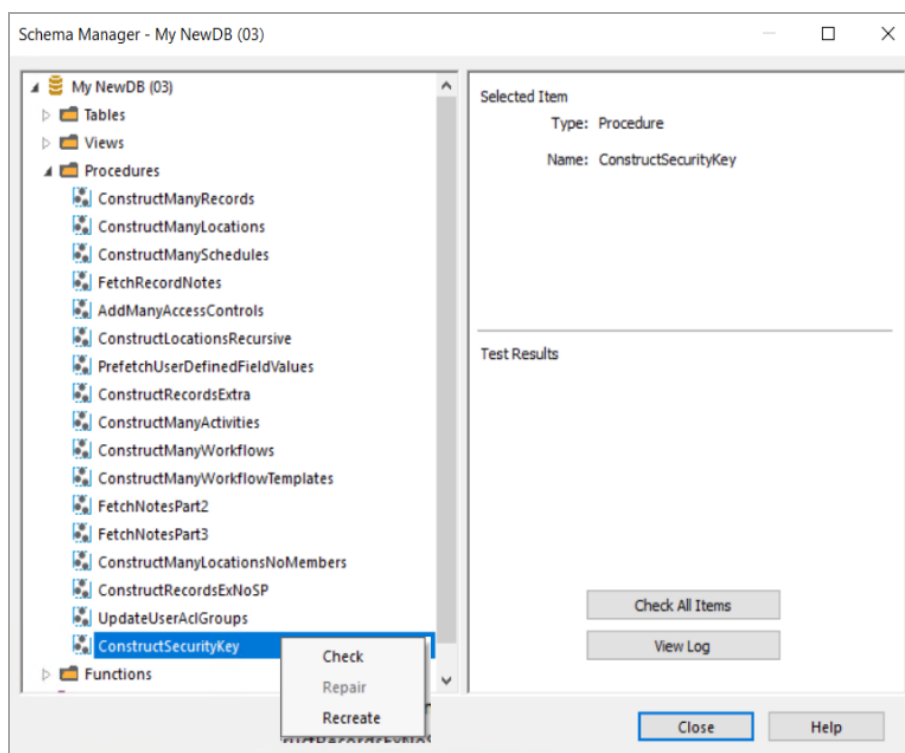
- Access exclusions on records;
- Referenced access exclusions on classifications and record types;

- Access controls inherited from client and matter records;
- The “inherited from container + in record access control list” option.

**To avoid timeouts with complex group hierarchies, manually install IDOL SecurityKeys stored procedure**

To manually install the stored procedure, follow the steps:

1. 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 to **ConstructSecurityKey** procedure.
4. Right-click > **Check** and then **Recreate**.



The stored procedure is installed for the dataset.

5. Click **Close** to exit out of **Schema Manager**.

## Key limits

### Data storage

**NOTE:** The following entities are a subset. The subset includes those key to Content Manager operations and most frequently of interest. Further details can be provided on request. The number of records you can have in Content Manager is mostly limited by the RDBMS system

you are using.

\* Recommended, but not strictly enforced upper limit. Beyond this limit, Content Manager has not been tested extensively and may be subject to performance degradation.

Entity	Limit
Record Types	1024 *
Record parts	99 *
Records in container	300 *
Security levels	99
Caveats	512
External links	20
Advanced search lines	20 *
Offline Records documents	500 * per user per dataset
Offline Records folders	60 *
Versions	99 *
Decimals and currency	A maximum of 15 digits before the decimal place, up to 8 decimal places
Edit box drop-down history	A minimum of 10 and maximum of 500, default is 25.
Recent Containers and Recent Documents	25
Document content index database	10 million documents per IDOL content index server (5 million recommended)

### Field length

Entity	Character limit
Record Number	50
Record Type Name	50
Part Numbers	2
Foreign Barcode	30

This entity supports multiple barcodes that can be upto 30 characters each separated by a semicolon

	(;).
Record Title (structured text)	1024
Record Title (free text)	1024
Thesaurus Term	100
Classification Plan number	10
Classification Plan level name	260
Security Level Name	50
Security Caveat Name	50
Person Surname	100
Organization Name	200
Group Name	200
Position Name	200
Location Telephone Number	30
Location Email Address	255
Person Initials	25
Logs in as (user name plus domain name)	255

Entity	Character limit
Notes	65536
External reference	50
Workflow Name	512
Workflow Activity Name	100
Retention Schedule title	200
Retention Schedule number	30
Consignment number	50
Priority	5
Additional text Field	65535
Lookup Set name	50

Lookup Set items	1024 *
Index word	50