# Content Manager

Software Version 23.3

## Manage in Place specification

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# Overview

Manage in Place (MiP) feature in Content Manager allows you to create records in Content Manager for documents located in storage systems external to Content Manager, such as Microsoft 365 (M365), Azure and AWS. Documents can be retained in their original location and continue to be live documents in their respective storage systems, while being registered as records in Content Manager.

This has the following benefits:

- **Performance** - No need to move a document from a location to the Content Manager electronic store.

- **User experience** - Users can continue to maintain the document, without necessarily being aware it is now also a record in Content Manager.

- **Record management** - Record management functionality can be applied to documents maintained in an external system.

# Manage in Place adapters

To support the Manage in Place feature, Content Manager introduces Manage in Place adapter (MiP adapter), allowing Content Manager to interface with external storage systems.

MiP adapters encapsulate the information necessary, such as URL's and credentials, to allow Content Manager to access documents in an external storage system.

MiP adapters are configured in the Content Manager client **Administration** tab (**Administration > Manage in Place adapters**. Content Manager supports the following types of MiP adapters:

1. Microsoft 365 MiP

2. Windows File System MiP

3. Amazon S3 MiP

4. Azure Blob Storage MiP

The Amazon S3 MiP and Azure Blob Storage MiP adapters are configured with the login credentials that the workgroup server will use to connect to and access the documents in AWS S3 or Azure blob storage.

The Windows File System MiP adapter requires a top-level root folder to be specified , and only files underneath that root folder will be eligible for MiP functionality. The Workgroup Server accesses the Windows file system using the Windows credentials of the Workgroup Server service.

The Microsoft 365 MiP adapter uses the M365 credentials configured in Content Manager Enterprise Studio (**Dataset > Properties > Microsoft 365**).

MiP adapters are also configured with parameters describing the default MiP scan process that should be run for records stored in the external system (see MiP record scan process, on page 10).

Content Manager uses the MiP scan process to create and maintain backup copies of MiP documents. Backup copies are stored in a standard Content Manager document store. The backup copy of a MiP document is used only for viewing if the MiP document is unavailable, due to network connectivity or other issues.

# Ingestion of Manage in Place records

There are several mechanisms in Content Manager for ingesting MiP records.

- **Using the Content Manager M365 integration** - The MS Teams and Office M365 integrations can be configured to create MiP records from M365 documents.

- **Using Manage in Place document queues** - Content Manager supports MiP document queues for the Windows File System and M365 MiP adapters.

- **Using the Content Manager SDK** - The **InputDocument.SetAsManagedInPlaceItem()** method allows MiP records to be created, using a MiP adapter and the details of the MiP document.

- **Using bulk loading** - The SDK **Origin** and **BulkLoader** classes can be used to bulk load large numbers of Manage in Place records. The **Origin.ManageInPlaceStore** property indicates which MiP adapter the records should be associated with.

There is no restriction on the Record Type used when creating a MiP record. The Record Type option to nominate a particular document store for that Record Type, is not relevant when creating a MiP record.

When using the SDK to create MiP records, the SDK application must be configured to log on to Content Manager as a trusted server account.

Client-side auto-profiling does not occur for MiP records, as it may not be possible for the client to retrieve the document at the point of record creation. For example, retrieving the MiP document is not possible for unattended SDK applications, as the retrieval would require interactive authentication.

Once ingested, all MiP Records have an **MiP External ID** property, which uniquely identifies the document within the external storage system.

The user can change which MiP adapter is associated with a MiP record using the **Transfer Storage** option (**right-click a record > Electronic**) in Content Manager client or using the **Record.TransferStorage()** method in the SDK.

# MS Teams, M365 Integration and Manage in Place

The MS Teams and Microsoft 365 Integration in Content Manager creates records either from the client or server side.

MiP records are created in the following scenarios:

- On the server side, configuration of the document store in EmailLink determines whether files will be Managed in Place or checked in to Content Manager document store (MS Teams integration only).

- On client side, when a user creates a record from a file (both MS Teams and M365 integrations).

MiP records are not created for Teams posts or chats, as the post or chat filed in Content Manager is not a single manageable object, but a collection of data objects compiled into a single file for the purpose of storage in Content Manager.

# Working with MiP records

Once a MiP record is created, it behaves like a regular Content Manager record. The MiP feature has been designed to allow MiP documents to be accessed and updated by end users in the external storage system (e.g., M365), while being simultaneously managed as a record within Content Manager.

- **Viewing** - The record can be viewed in Content Manager. Content Manager will download the document from the external system. Client-side document caching is applied. If Content Manager is unable to download the document from the external system, the user can choose to view the latest backup made of that MiP document.

- **Viewing in original location** - For supported MiP adapters, such as M365, Content Manager provides an option to view the document in its original location.

- **Document content indexing** - MiP documents are processed for document content indexing just like other records. When a MiP scan detects changes to a MiP document, the document is re-indexed.

- **Record metadata** - Record metadata such as notes, locations, relationships, container hierarchies, classifications, and disposal schedules can be applied.

- **Searching** - MiP records can be searched for in the same way as any other record. To find all records associated with a MiP adapter, the user can search by **Document Store** and specify the name of the MiP adapter.

- **SDK access** - MiP records can be retrieved and manipulated from the Content Manager SDK.

# Restrictions on MiP records

There are a number of restrictions around the records management operations that can be performed on a MiP record, stemming from the fundamental restriction that the storage of MiP documents is controlled by an external system rather than by Content Manager.

1. The following basic document edit tasks are not available:

    a. Edit

    b. Checkout

    c. Checkout to OneDrive

2. Recycle is not available

3. The following electronic tasks are not available:

    a. Signature

    b. Promote Previous Revision

    c. Remove Document

    d. Remove Previous Revision

    e. Exposed Records and others.

    f. Annotate

    g. Continue Redaction

    h. Hash Check

    i. Hash Calculate

4. All document Review/Authorization tasks are not available

## Access control

Because a MiP document can be accessed in both Content Manager and in the external system, access controls must be configured by setting appropriate access controls in both systems. Administrators must be aware that:

- Access controls configured in Content Manager are not enforced in the external system.

- Access controls configured in the external system are not enforced in Content Manager.

# MiP record scan process

As part of the MiP feature, Content Manager provides the ability to scan all MiP records associated with a given MiP adapter. The MiP scan process provides the following functionalities:

- Take a backup copy of the MiPdocument and store in Content Manager.

- Update backup copies in Content Manager, when changes are detected to the MiP document.

- For missing MiP documents, either

    1. Restore missing MiP documents from the backup copy held in Content Manager.

    2. Transfer MiP record to Content Manager using latest backup copy.

    3. Report the missing MiP documents.

The default behaviour of the MiP scan is controlled by the MiP adapter configuration. The MiP scan settings consist of the options described above, together with a schedule for running the MiP scan.

MiP scans can be run in the following ways:

- As an event process, running on the MiP scan schedule defined for the MiP adapter.

- As a TRIMAdminCmd administration task, using the **TRIMAdminCmd --cmd manageInPlaceScan** command line.

- On demand, from **Administration > Manage in Place adapters > Right-click > Scan Managed in Place Items**.

When run on demand, the MiP scan settings can be modified from the default values specified for the associated MiP adapter. The MiP scan can also be configured to run on selected records, rather than all records associated with that MiP adapter.

When run on demand, the user can select an option to create an admin task settings file, which can be provided to TRIMAdminCmd, to run unattended MiP scans with the same settings.

# Transferring MiP records to Content Manager

MiP records can be converted from MiP records to conventional Content Manager records, by transferring their storage to a Content Manager store. As part of the transfer, Content Manager will delete the document from the external system.

Once a MiP record is transferred to Content Manager, it becomes a conventional Content Manager record and can be managed as such in Content Manager.

A records administrator may perform this transfer operation at any time, by using the **Transfer MIP to Content Manager** option.

At some point, in the records management lifecycle, Content Manager may deem it necessary for a MiP record to be transferred to Content Manager. This includes:

- When the MiP record is to be added to an Archive (Keep Forever) or Archive (Custody Transferred) Consignment

- When a Hold is placed on a MiP record. This is at the discretion of the user. See Holds on MiP records, on page 15.

When a MiP record is deleted from Content Manager, the default behaviour is to retain the MiP document in the external system. When deleting the MiP record, it is also possible to specify that the MiP document should be deleted from the external system.

# Consignments and MiP records

When a MiP record is a candidate for an Archive Consignment or a Transfer Consignment, it will generate an Issue. For these consignment types, Content Manager must have ownership over the document, and the MiP record must either be transferred to Content Manager or removed from the consignment.

MiP records can be candidates for a **Destruction Consignment**, in which case the MiP document is deleted when the record is destroyed.

# Archiving and MiP records

It is not possible to set the Disposal action of a MiP record to Archive (Keep Forever) or Archive (Custody Transferred). The MiP record must first be transferred to Content Manager.

The Disposal action of a MiP record may be set to **Destroy**, in which case the MiP document is deleted when the record is destroyed.

# Finalizing a MiP record

When a MiP record is finalized the MiP document is automatically transferred to Content Manager and deleted from the source repository. From that point Content Manager will manage the document.

# Holds on MiP records

Content Manager provides following options for placing a hold on a MiP record:

1. Transfer MiP record to Content Manager and add to hold.

2. Add MiP record to hold and capture the MiP document as a Revision on the MiP record.

When using option 1, the MiP document will no longer be available in the external system, and can only be accessed in Content Manager.

When using option 2, the MiP document will continue to be available in the external system, while the state of the document at the time of the hold, is preserved in Content Manager as a Revision on the MiP record.