

# Content Manager

Software Version 23.4

Release Notes

**opentext™**

Document Release Date: December 2024  
Software Release Date: December 2024

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

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

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

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# Content Manager Release Notes

## Introduction to Content Manager 23.4

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

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

Content Manager provides document and records management, e-mail management, web content management, imaging, workflow, and document-centric collaboration to organizations worldwide. Developed with more than three decades of information management expertise, Content Manager enables organizations to lower operating costs, secure information, enhance compliance, and increase productivity.

Content Manager 23.4 is designed to support the International Standard of Records Management (ISO 15489:2001), and elements of ISO16175: Principles and Functional Requirements for Records in Electronic Office Environments.

Content Manager 23.4 focuses on providing OpenText Brava and Blazon technology to our users, which offers enhanced features in the areas of rendition, redaction, annotation, and viewing. In particular, auto-redaction is now available in Content Manager because of this integration. Content Manager 23.4 highlights also include: support for private channels in the Microsoft Teams integration, the ability to restore compressed files, and improvements to drag and drop in the web client interface.

## Overview of Content Manager

This is the third patch release of the Content Manager 23.4 program series. This release includes all fixes and enhancements that were shipped in the previous releases of Content Manager. For details of the previous releases, please refer to the relevant release notes.

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

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

For technical details, including the support matrix, refer to **CM23.4\_Spec.pdf** and **CM23.4\_Install.pdf**. Content Manager documentation can be found on the [Documentation portal](#).

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

[https://kmviewer.saas.microfocus.com/#!/PH\\_219857](https://kmviewer.saas.microfocus.com/#!/PH_219857)

**IMPORTANT:** The configuration information for **OpenID connect authentication**, **Zero footprint Office integration**, **MS Teams integration**, and **Mobile App setup**, in the SDK help (<https://content-manager-sdk.github.io/Community/>) has been made available in the PDF documentation. Further updates to the configuration information, if any, will be available as part of the below mentioned PDF documents. Customers who have developed SDK applications or add-ins should refer to the following documents:

- CM23.4\_OpenIDAuthentication.pdf
- CM23.4\_Zerofootprint\_Integration.pdf
- CM23.4\_MSTeams\_Integration.pdf
- CM23.4\_MobileApp\_Setup.pdf

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

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

- Select **Content Manager (Records Manager/TRIM)** as the **Product** filter
- To display the list of included Defects, select **Known Problems** as the **Document Type** filter.
- To display the list of included enhancements, select **Enhancement Requests** as the **Document Type** filter.
- Type **23.4** into the **Search Terms** field and then click **Search**.

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

## New Install and Upgrade Considerations

**IMPORTANT:** When you install Content Manager for the first time or you upgrade from the previous version and you encounter security issues, then refer to *Security considerations* section in **CM23.4\_Spec.pdf**.

**NOTE:** Contact OpenText Support, if any of the external links mentioned in the PDF documentation or help files are not available.

### Content Manager functions

After installation, deploy the below database functions as part of the patch upgrade process. This will switch to the Anyword search feature with bug fixes.

Order of Database functions to be deployed:

1. `fn_parseStringBrackets`
2. `fn_gatherLikeData`
3. `fn_gatherContainsData`
4. `fn_SearchTitleAndNotes`

To manually install the database functions, perform the following steps:

1. Right-click on the dataset where you want to install the functions.
2. Navigate to **Schema > Manage**. The Schema Manager dialog is displayed.
3. In the left pane, expand **Functions**.
4. Select the `fn_parseStringBrackets` function, right-click > **Check** and then **Recreate**.
5. Repeat step 4 for all the functions mentioned above.
6. Once all the functions are recreated, click **Close** to exit out of Schema Manager.

### Content Manager stored procedures

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

Order of stored procedure to be installed:

1. `tsAclOthersCheck`
2. `tsAclRTAndFPCheck`
3. `tsAclRecordCheck`
4. `tsAclWorkflowCheck`

5. tsAclCheck
6. tsAclStoreCheck

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

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

### **Limit for temporary database size in SQL**

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

### **Draft version of annotated document**

If you are upgrading from a previous version of Content Manager and have draft version(s) of annotated electronic documents, then after upgrading to Content Manager 23.4, the annotations in the draft version(s) will not be available. It is recommended to permanently save the draft version(s) before upgrading to Content Manager 23.4.

### **Content Manager ImageScanner tool**

From Content Manager 23.4 onwards, the Content Manager ImageScanner tool is not bundled with Content Manager installer.

## **New Features**

### **Platform Continuance**

Content Manager 23.4 introduces support for:

- IDOL 23.2 and Media Server 23.3.1
- KeyView 23.2 P1 Hotfix (23.2.1.8531)



## Content Manager Microsoft Teams Integration

### Adding a private channel

In Content Manager Microsoft Teams integration, we now support private channels. The newly created private channel will be displayed under the main channel. The owner of the channel can add members to this channel. The posts and files on this channel will be accessible only to the members of this channel. Only the members of this channel can capture content to Content Manager.

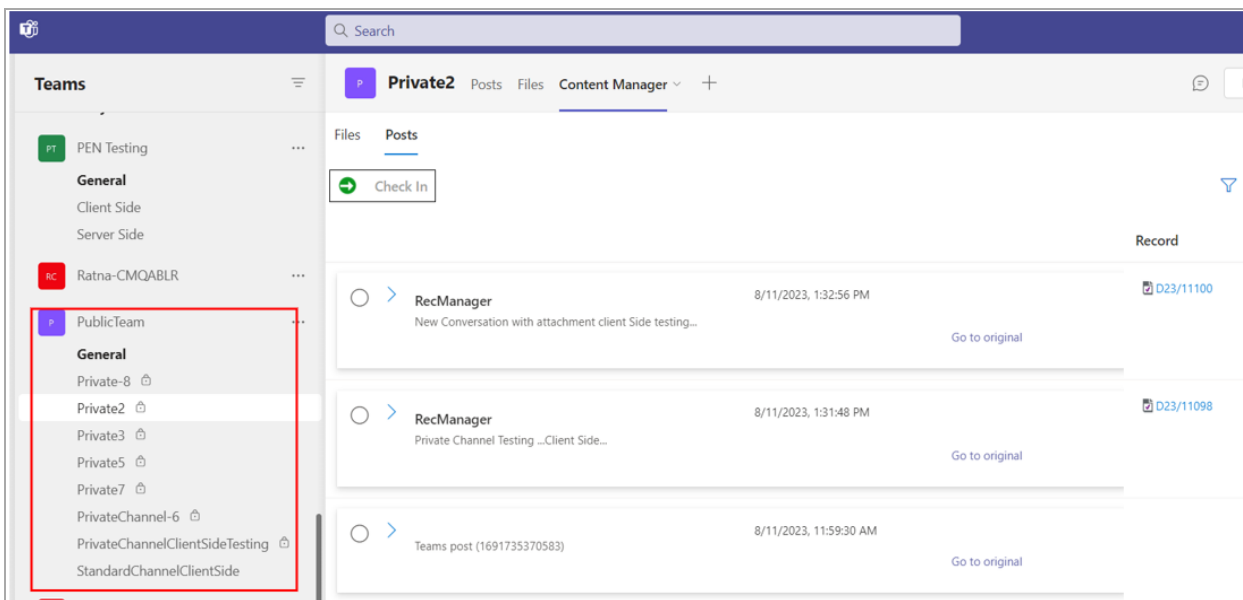


Figure 1: Private channels

For more information, see *Content Manager MS Teams integration help*.

### Capturing the subject line

The Microsoft Teams integration supports capturing the subject line of your post in channel(s) to Content Manager. If your post includes a subject line, then the record title is auto populated with the subject line of the post. Otherwise, the body is auto populated as the record title.

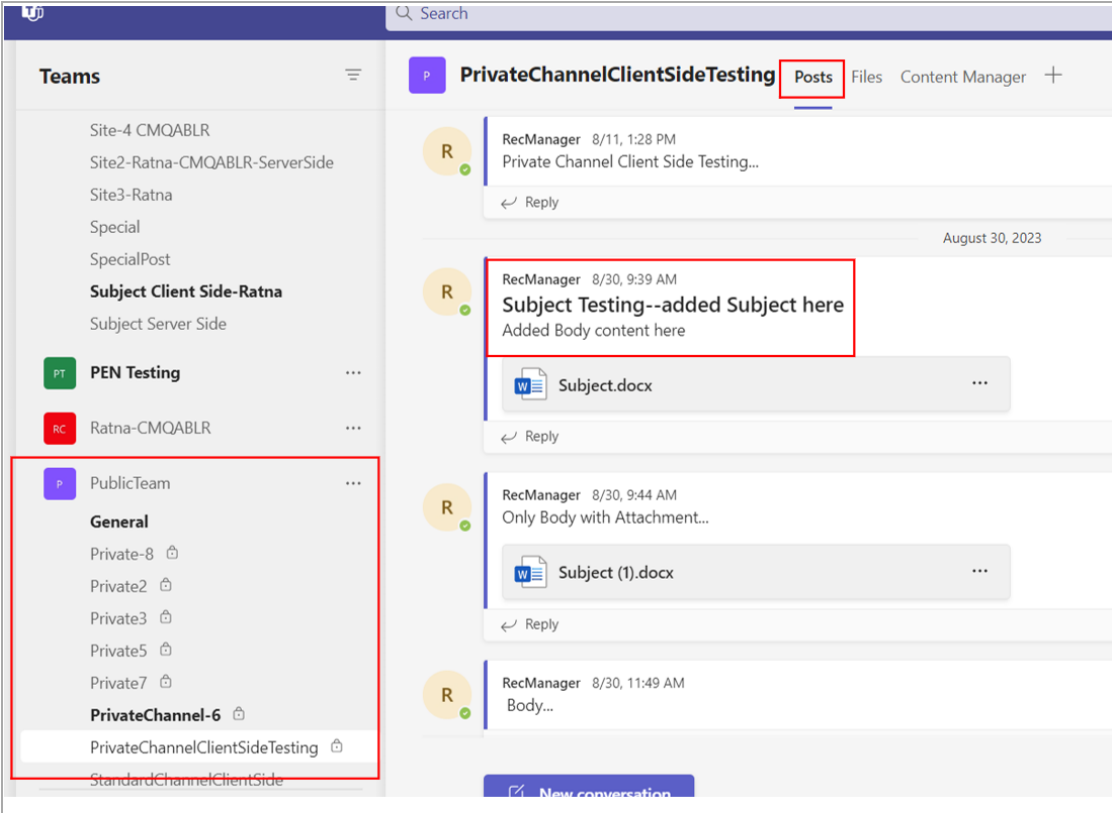


Figure 2: Post with a subject line

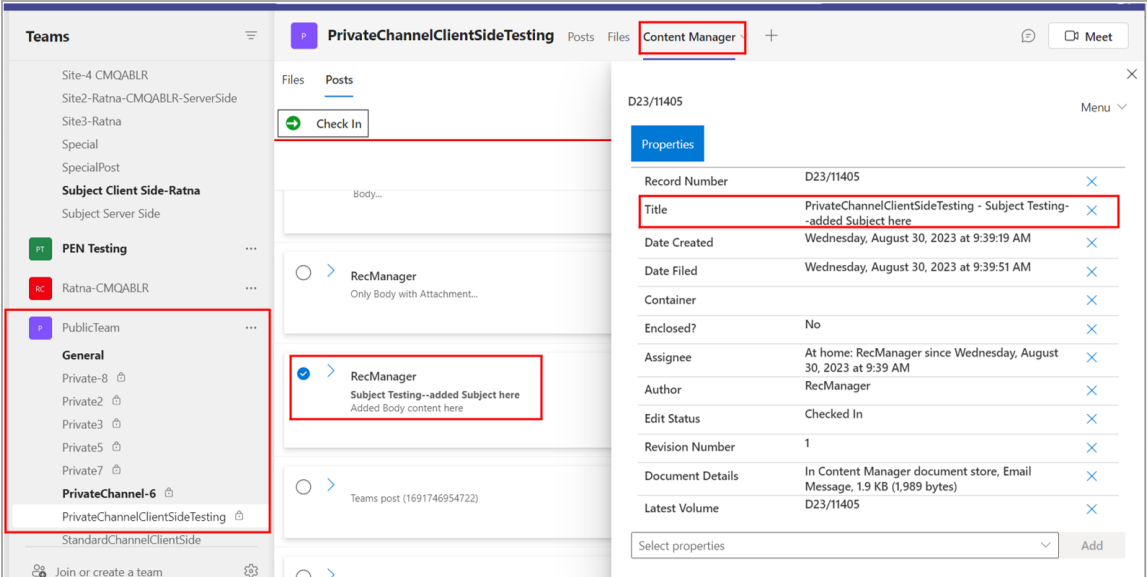


Figure 3: Post with the subject line captured in Content Manager

## Content Manager Web Client

### Enhanced drag and drop of electronic document

In the Content Manager Web Client, the functionality to create a new record by dragging and dropping an electronic document is enhanced. You can drag and drop single or multiple electronic document to the record list area, to a particular container in the record list, or to a Category/Classification on the left pane of the Explorer panel.

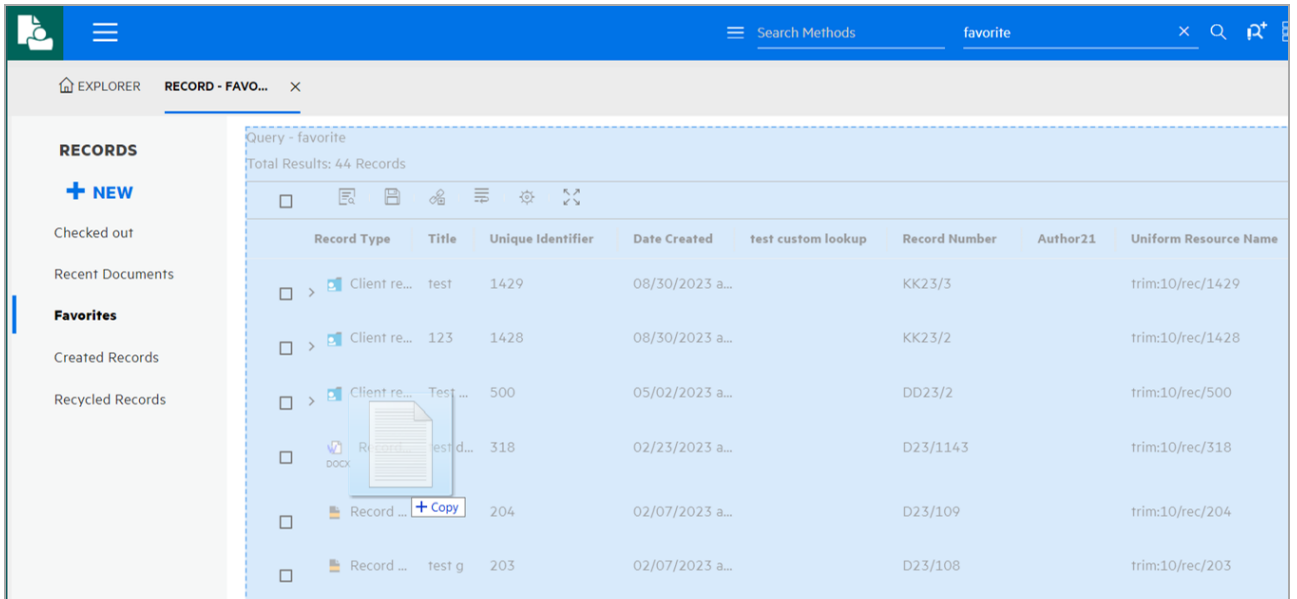


Figure 4: Drag and drop to the record list area

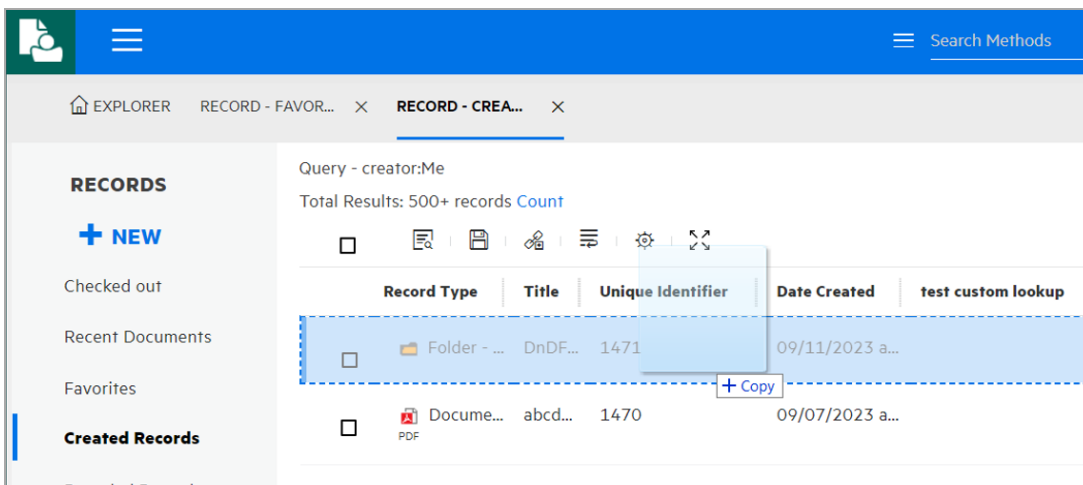


Figure 5: Drag and drop to a folder in the record list area

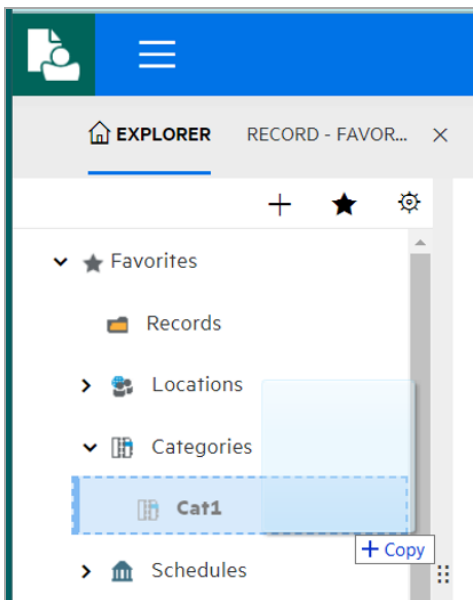



Figure 6: Drag and drop to a Classification/Category

### Resizing column header length

The Content Manager Web Client provides a new option, **Resize columns to fit** () , available in the standard toolbar of the results tab. The new option allows you to adjust the column width to fit the length of the column title.

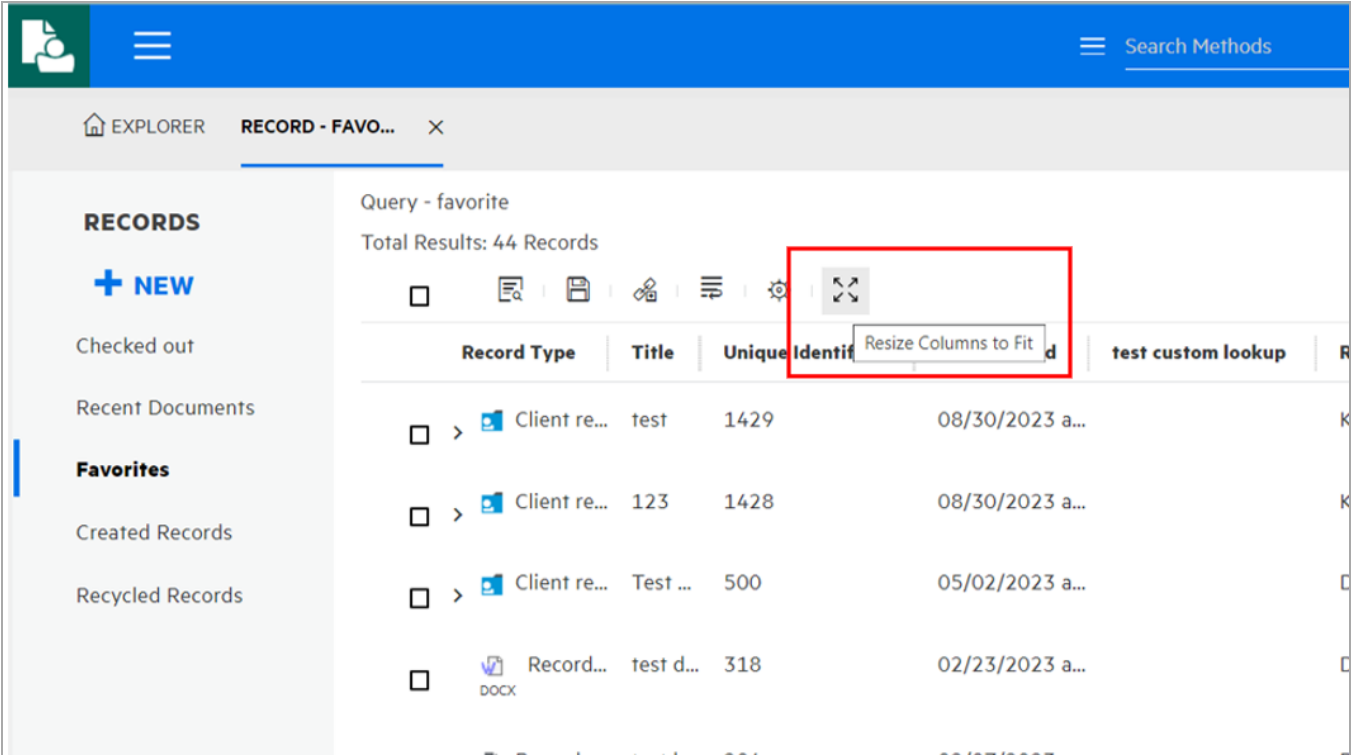


Figure 7: Resize column header

## Content Manager Client

### Ability to compress the logs

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

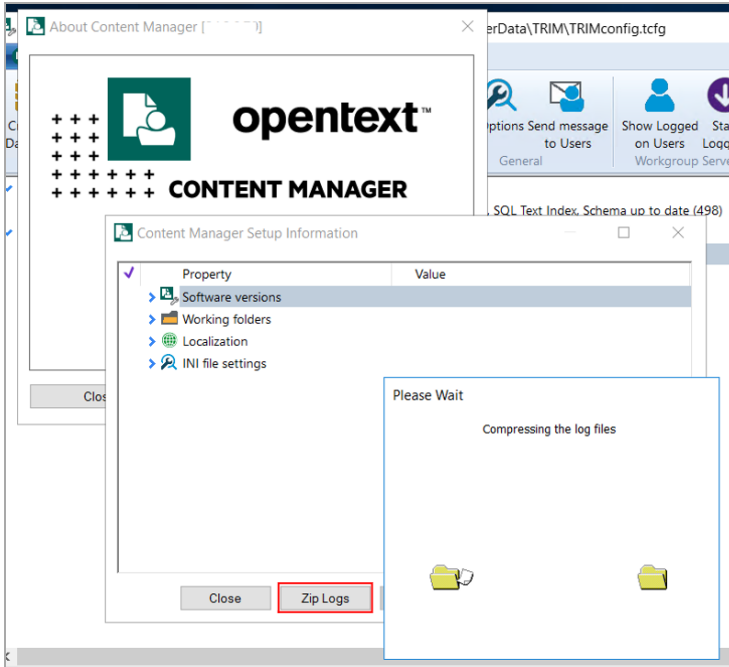


Figure 8: Zip Logs in Setup Information

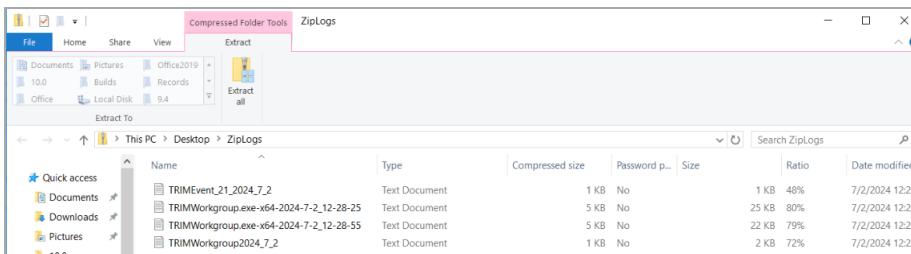


Figure 9: .zip file in File Explorer

For more information, see *Content Manager* help.

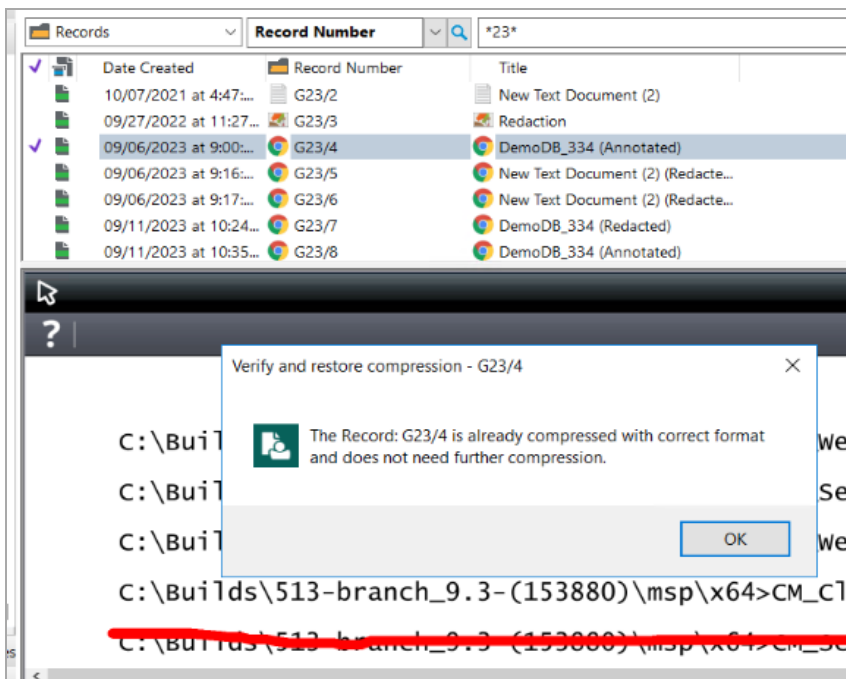
### Verify and restore compression

The functionality to transfer a compressed document between document stores is enhanced. Content Manager provides a new option to verify and restore compressed documents.

When you transfer a record with an attachment, multiple times, to a compressed document store, the record gets compressed multiple times. For example, **RecA** with **sample.txt** as electronic document is moved to compressed **store A** will be **RecA.zip** containing **sample.txt** and when the same **RecA** is transferred to **store B**, the **RecA** is compressed again as **RecA.zip.zip** containing **sample.txt**. Viewing the **RecA** will display the **RecA.zip** and not the **sample.txt** electronic document.

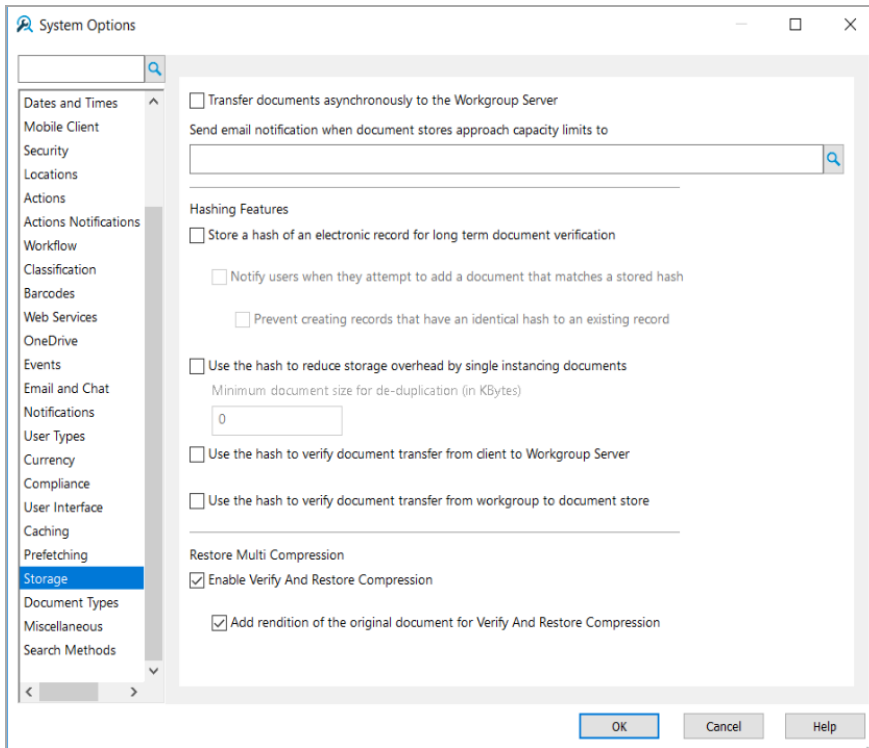
To overcome this issue, select the **Verify And Restore Compression** option to verify and restore a record that is compressed multiple times to the same document store.

Right-click on the record, select **Electronics > Verify And Restore Compression** option to check whether the attached document is compressed with correct format.



**Figure 10: Verify and restore compression of a record**

For this option to be available, make sure to enable **Enable Verify And Restore Compression** option in the System Options Storage page.



**Figure 11: Enabling the verify and restore compression option**

This option is useful in scenarios where there are several transfers or back and forth of records to compressed document stores and you are unable to preview the electronic document attached to those records.



## Content Manager integrations

### Content Manager integration with OpenText Blazon Enterprise Server

In the previous versions of Content Manager for Long Term Storage (PDF) rendition, Content Manager used Objective Onstream (OnstreamPrinterFiles to install printer drivers) and Objective Trapeze viewer. From 23.4 onwards, Content Manager uses OpenText Blazon Enterprise Server for Content Manager Document Rendering feature. **The usage of OnstreamPrinterFiles is discontinued from Content Manager 23.4 onwards.**

Install the OpenText Blazon Enterprise Server on a computer on your network and run the **Content Manager Blazon Integration x64.msi** to integrate Blazon Enterprise Server with Content Manager.

You have to provide details of Blazon Queue Server and staging folder in the **Rendering** tab of Content Manager Enterprise Studio, to enable the Workgroup Server to process automatic PDF request generation.

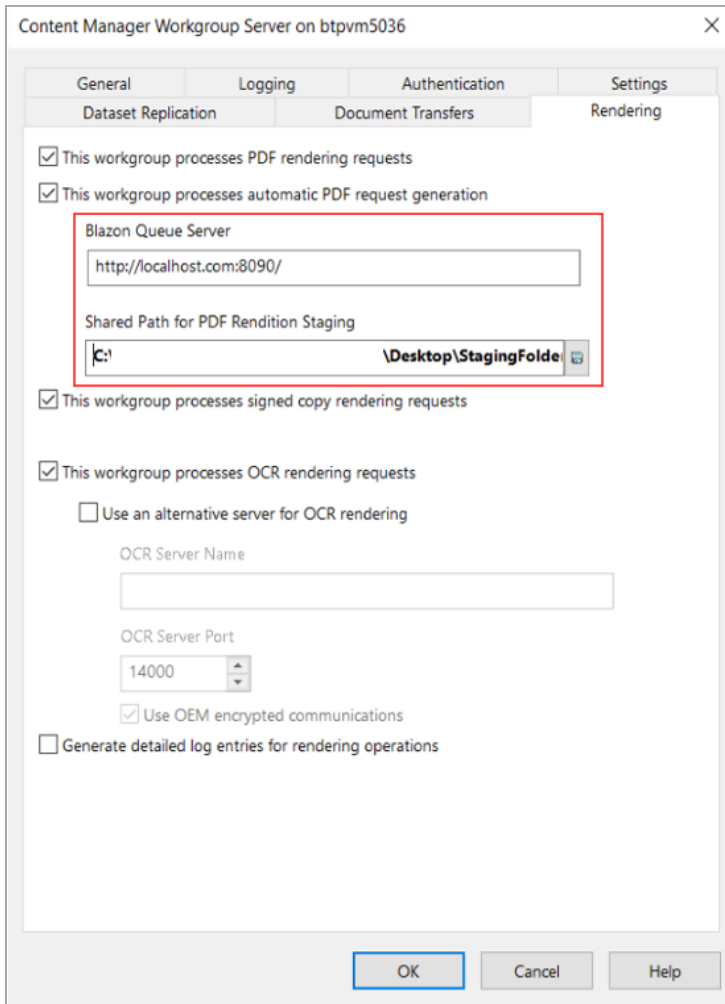


Figure 12: Blazon Server details in the Content Manager Enterprise Studio

For more information, see *Installing the Blazon Enterprise Server* section in *Content Manager Installation and Upgrade Guide*, *Content Manager Enterprise Studio help*, and *Content Manager help*.

### Content Manager integration with OpenText Brava

From 23.4 onwards, Content Manager uses OpenText Brava for redaction, annotation, PDF and enhanced image viewer feature. The Objective Trapeze viewer is replaced by OpenText Brava.

In the previous versions, for redaction and annotation, you had to convert electronic document to .tiff format. The OpenText Brava overcomes by supporting redaction and annotation on PDF formats. Hence, .tiff rendition functionality is removed from Content Manager.

**NOTE:** If you are upgrading from a previous version of Content Manager and have draft version (s) of annotated electronic documents, then after upgrading to Content Manager 23.4, the annotations in the draft version(s) will not be available. It is recommended to permanently save the draft version(s) before upgrading to Content Manager 23.4.

For more details on Content Manager annotation and redaction, see *Annotations and redactions* section in the *Content Manager help*.

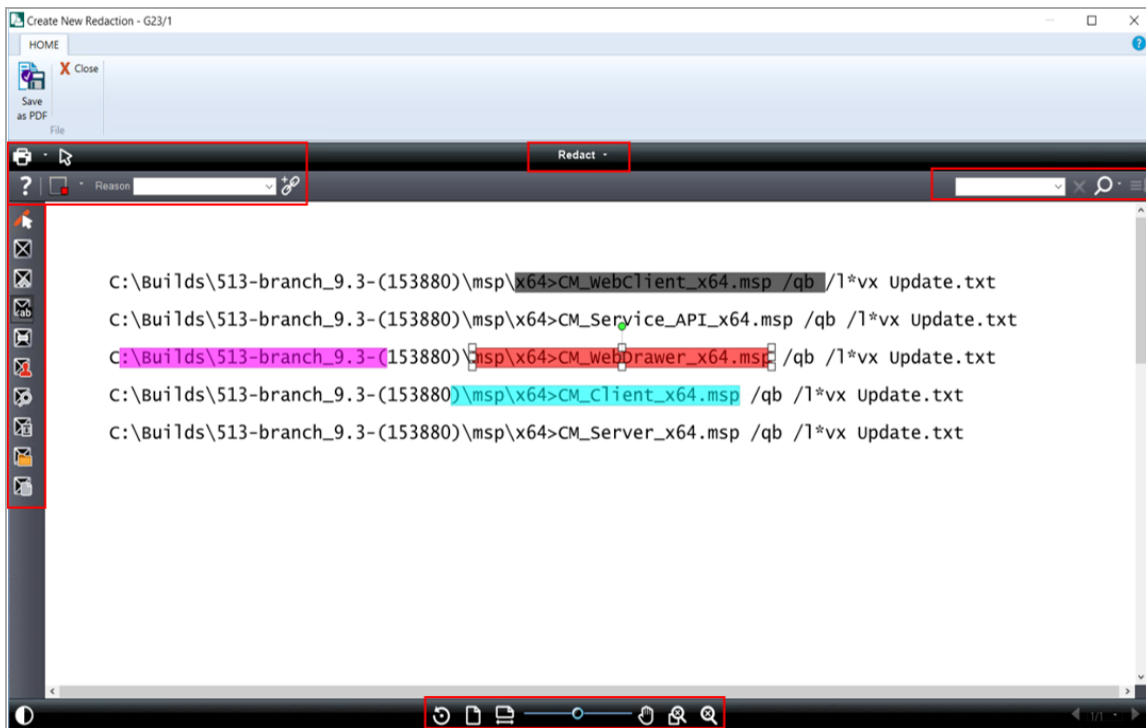


Figure 13: Redaction using the OpenText Brava

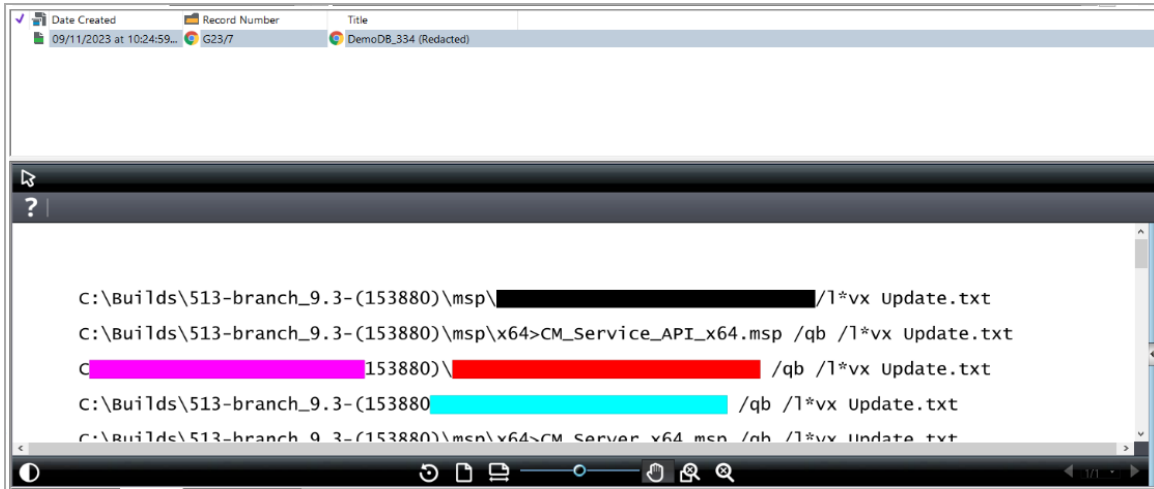


Figure 14: Redacted document

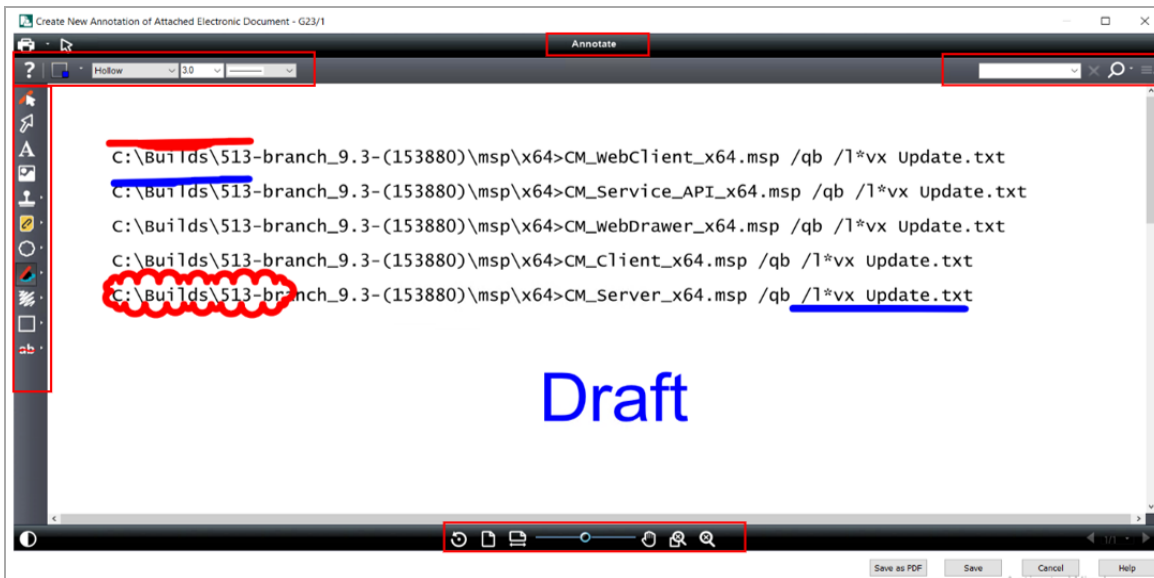
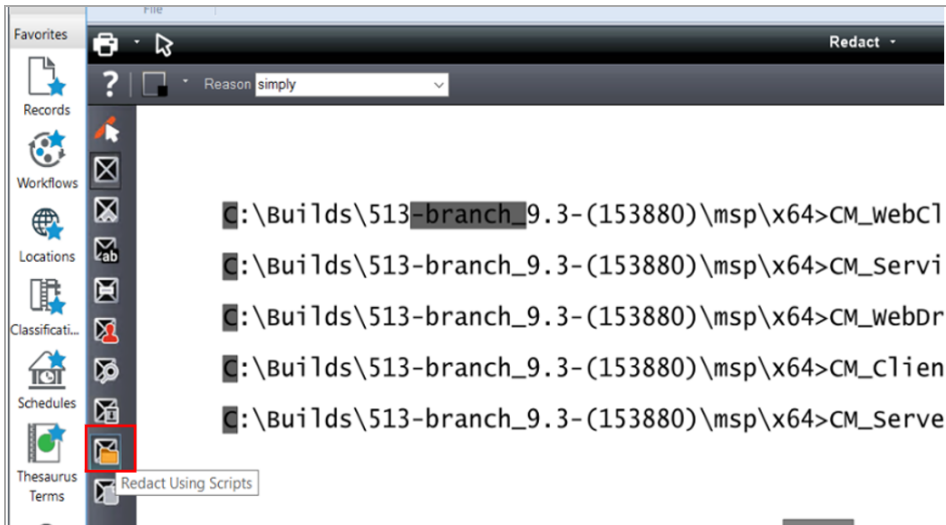


Figure 15: Annotated document

### Auto redaction

The OpenText Brava provides an option, **Redact Using Scripts**, that allows you to run a command to find and redact specified phrases and sections of a document in one action, through the use of redaction scripts.



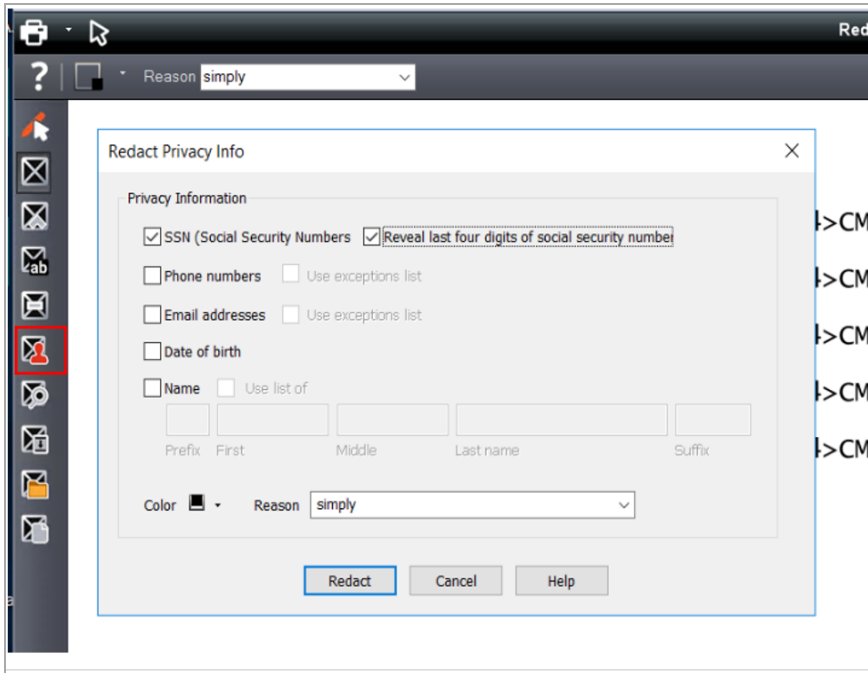
**Figure 16: Auto redaction using the Redact Using Scripts tool**

The OpenText Brava comes pre-populated with a list of redaction scripts that can be run on documents (Find and redact social security numbers, email addresses, etc). You can use these sample files, located in the installed **MacroExampleScripts** directory, or create custom scripts. You can use search string commands or macros in your redaction script files to search and redact specific lists of words and search patterns.

**Redacting privacy information**

The OpenText Brava provides an option, **Redact Privacy Info**, to find and redact sensitive information commonly found in documents and forms including Social Security numbers, Phone numbers, Email addresses, Date of birth, and names.

This dialog acts as a convenient tool for using the available predefined search macros without needing to format search strings. You can select one or more of the text pattern methods to apply to the current document.



**Figure 17: Redacting sensitive information using the Redact Privacy Info tool**

### Searching text in document

With the Search Text function, you can search for text (normal phrases and text patterns) contained in a document or drawing file. The Search Text function also processes image format documents using OCR to convert the image text to searchable text.

The **Term Hit** option in the Search Text function allows you to enable or disable the highlighting mode for viewing text patterns found in the document or OCR text. When selected, all the matching results are highlighted in yellow.

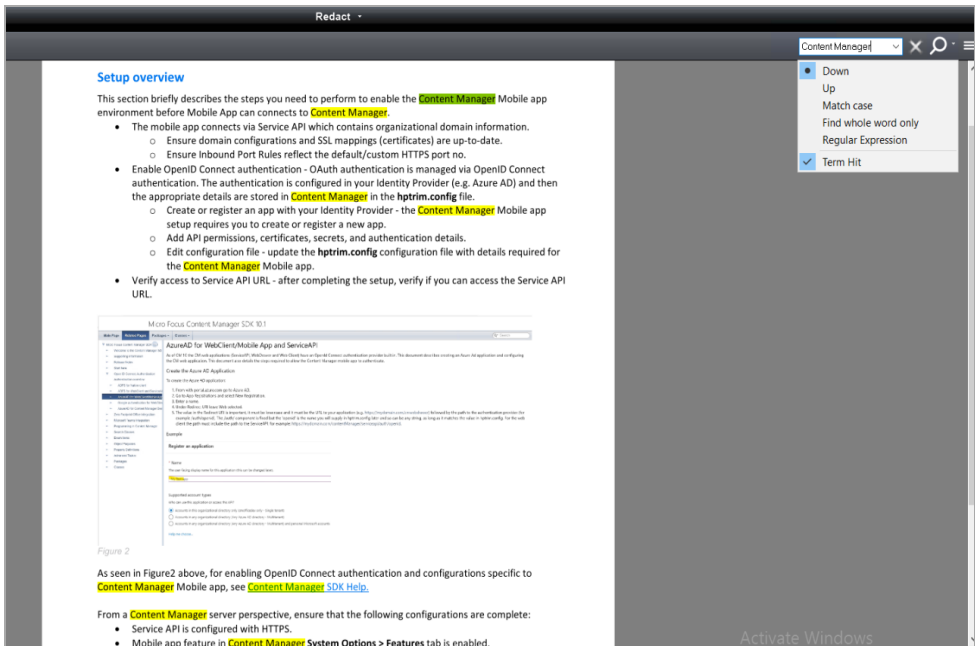


Figure 18: Searching text pattern using Term Hit option for OCR text

**IMPORTANT:** For more details on the features now available in Content Manager from Brava and Blazon, refer to Brava and Blazon documentation:

- [OpenText My Support](#)
- *OpenText Blazon Enterprise Administration Guide* available at the location where you have extracted the Content Manager package in the **Additional Installations\Blazon Enterprise** folder.

## Enhanced Features

### Content Manager Client

#### Enhanced OpenID authentication

You can now bypass the OpenID authentication prompt by adding the **BypassSignInprompt** property and setting its value to **1** in the **TRIMMetrics.ini** file under the **[Client]** section. If enabled, allows implicit sign-in to Microsoft webpages using any account, by using the information from the primary OS account. By default, the value of this property is set to **0**.

## Obsoleted Platforms

Please refer to [CM23.4\\_Spec.pdf](#) for details on the Support Matrix.

## Obsoleted Features

- TIFF format rendition has been deprecated since it is no longer a requirement for the new Redaction and Annotation workflows. The “TIFF” tab under the Render configuration of Enterprise server now stands removed.
- The compression algorithm for PDF-A is updated and the PDF-A tab under Render configuration of Enterprise server now stands removed.
- From Content Manager 23.4 onwards, the Content Manager ImageScanner tool is not bundled with Content Manager installer.