

Content Manager

Software Version 24.3

Release Notes

opentext™

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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.

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Content Manager Release Notes

Overview of Content Manager

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

With the ability to scale across large, distributed environments, and to easily integrate with other applications, Content Manager lets organizations capture, classify, manage, access, and secure enterprise information regardless of format. Content Manager offers a tight integration with the M365 suite and with Google Drive, and it offers physical records management features on top of being an electronic content management solution.

Content Manager lets organizations leverage accurate, contextual, and complete information throughout the data lifecycle, additionally providing document creation, collaboration, and business intelligence features. Managing content this way helps significantly improve efficiency, business decisions, and insight for future strategy.

Content Manager offers secure access to data through a modern web interface, as well as integrating with other application interfaces. It allows active management of data by the end user, and also passive and automated management of data in the back-end through its retention engine.

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 is designed to support the International Standard of Records Management (ISO15489:2001), and elements of ISO16175: Principles and Functional Requirements for Records in Electronic Office Environments

Content Manager 24.3 key new features include:

- Content Manager Client
 - [Check Out documents to Google Drive](#)
 - [Ability to compress the logs](#)
- Content Manager Web Client
 - [Export items to .csv file](#)
 - [Ability to add communication and related records](#)
- Content Manager MS Teams and ZFP (Zero Foot Print) Office/Outlook Integrations
 - [New setup script to create Azure applications](#)

Introduction to Content Manager 24.3

This is the first patch release of the Content Manager 24.3 program series. This release includes all fixes and enhancements that were shipped in the previous releases of Content Manager. For details

of the previous releases, please refer to the relevant release notes.

This release includes support for English (International) and English (US).

The new and enhanced features described in the following sections fall under the **Collaboration** and **Modern Interface** themes.

For technical details, including the support matrix, refer to **CM24.3_Spec.pdf** and **CM24.3_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_219146

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:

- CM24.3_OpenIDAuthentication.pdf
- CM24.3_Zerofootprint_Integration.pdf
- CM24.3_MSTeams_Integration.pdf
- CM24.3_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 **24.3** into the **Search Terms** field and then click **Search**.

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

New Install and Upgrade Considerations

IMPORTANT: When you install Content Manager for the first time or you upgrade from the previous version and you encounter security issues, then refer to *Security considerations* section in **CM24.3_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 Outlook Integration

Content Manager Outlook Integration has been available in three different flavors, namely, Content Manager Microsoft Office integration, Thin Office integration, and the ZFP client. The more traditional integrations (Content Manager Microsoft Office and Thin Office) are COM add-in based while the ZFP client is a web-based add-in. Microsoft has announced discontinuing the support for COM add-ins for the new Outlook. For more details on this announcement, see [KB Article KM000018799](#).

Going forward, users migrating to the new Outlook can only use the ZFP client which is a web-based add-in. Classic Outlook users can continue to use the Content Manager Microsoft Office and Thin Office integrations. Because of the architectural differences with the underlying technology, there are differences in the user experience between both types of add-ins that may require additional knowledge. This will be highlighted in a future community post or a webinar.

The minor parity differences in functionality are being addressed in the on going releases. For the functionality addressed in this release, see [Auto populate Record Type or Check In Style](#).

Supports TLS 1.3

From version 24.3 onwards, the Content Manager Service API endpoint supports TLS 1.3.

Limit for temporary database size in SQL

As part of an architectural modifications, the Content Manager Workgroup Server now 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.

Behavioral change

Content Manager Document Icons

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

Handling custom configurations (Upgrade scenarios only)

NOTE: This section is applicable for upgrading the Content Manager to major versions and not for minor, patch, or hotfix releases.

To ensure all your custom configurations are available after the upgrade, perform the following steps:

1. For all the configuration files that you have customized, rename the files.
2. Upgrade the Content Manager to the required or latest version.
After upgrade you will have the latest configuration files required for the upgraded Content Manager version but without the customizations.
3. Compare and copy, manually, all the custom configurations to the respective configuration files in the Content Manager installation folder.
4. Restart the services.

New Features

Platform Continuance

Content Manager 24.3 introduces support for:

- IDOL 23.4 and Media Server 24.1.0.0
- KeyView 24.1.0.0

Content Manager Client

Check Out documents to Google Drive

The **Check Out to Google Drive** enables you to check out an electronic document from Content Manager to your Google Drive. This helps you to share the document(s) with other Content Manager users or external users for viewing and editing the document(s) from the Google Drive.

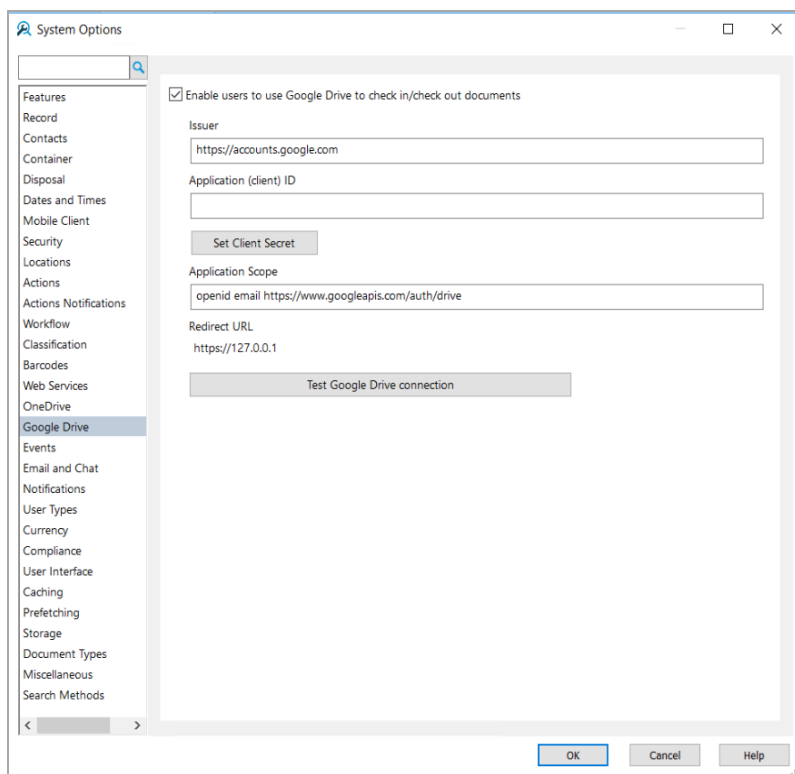


Figure 1: System Options Google Drive page

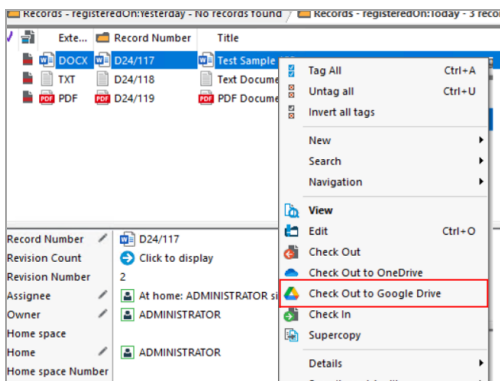


Figure 2: Record right-click > Check Out to Google Drive

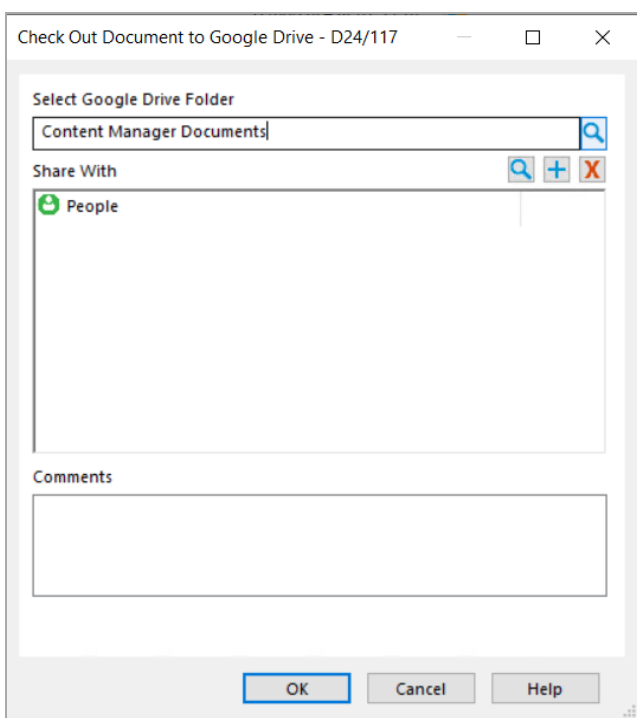


Figure 3: Check Out to Google Drive dialog

For more details, see *System Options Google Drive* page and *Checking out to OneDrive or Google Drive* sections in *Content Manager* help.

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**.

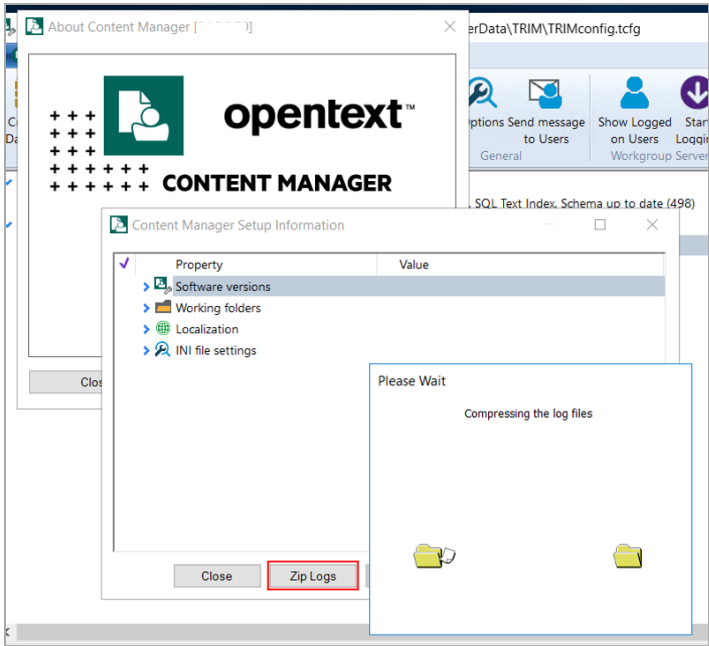


Figure 4: Zip Logs in Setup Information

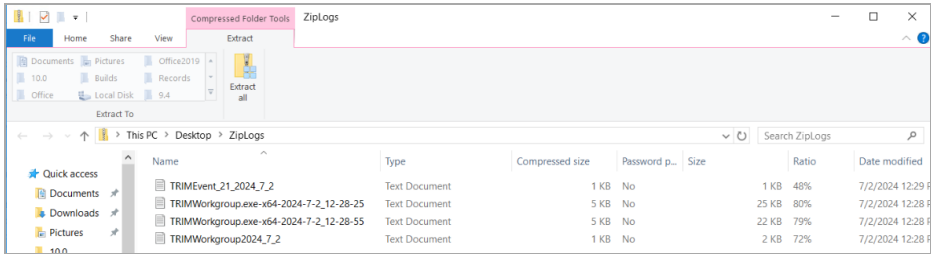


Figure 5: .zip file in File Explorer

For more information, see *Content Manager* help.

Content Manager Web Client

Export items to .csv

This feature was created to enable end users to easily and quickly generate reports from the results displayed in the Grid view (Web Client). When viewing a search result, the returned objects and metadata fields from the Grid view can be exported as a report. This feature is more powerful when combined with the custom grid views feature, which allows the custom grid views to essentially work as "reporting templates".

The **Export as** allows you to export the metadata of the columns displayed in the result set as a .csv file. You can export the records delimited by a comma, semicolon, or a tab.

The **Export as** is available for Grid view only. Select atleast one record from the result set to enable this option.

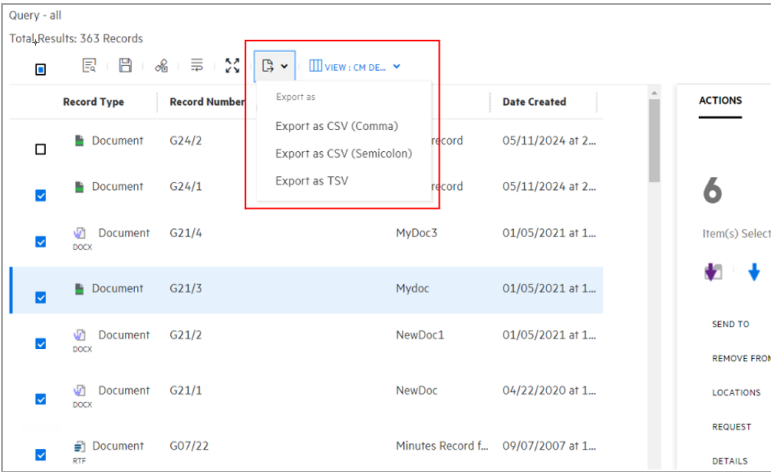


Figure 6: Export as in a Grid view

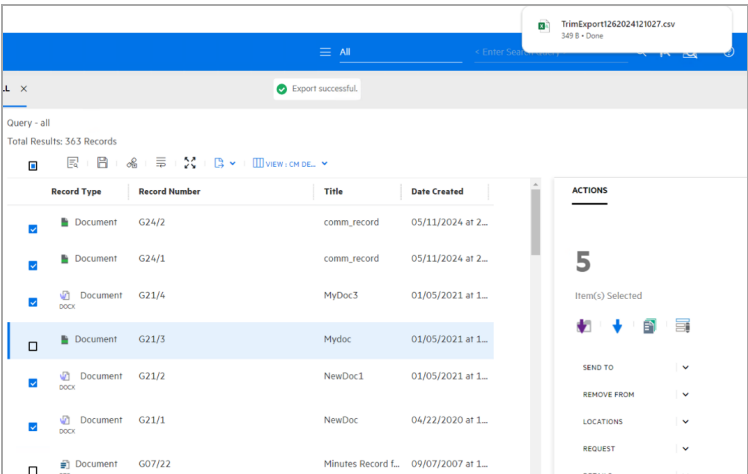
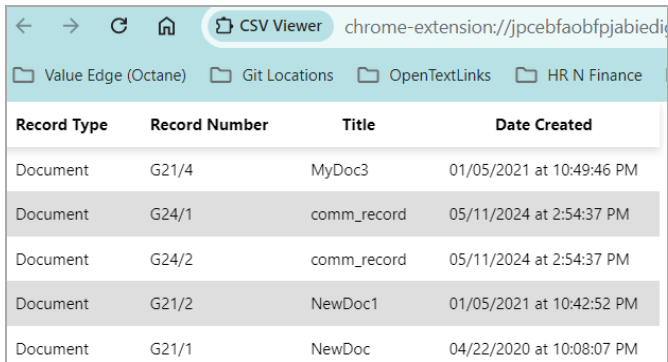


Figure 7: Exporting records as a comma separated .csv file


Record Type	Record Number	Title	Date Created
Document	G21/4	MyDoc3	01/05/2021 at 10:49:46 PM
Document	G24/1	comm_record	05/11/2024 at 2:54:37 PM
Document	G24/2	comm_record	05/11/2024 at 2:54:37 PM
Document	G21/2	NewDoc1	01/05/2021 at 10:42:52 PM
Document	G21/1	NewDoc	04/22/2020 at 10:08:07 PM

Figure 8: Exported records in .csv file

For more details, see *Exporting records* section in *Content Manager Web Client* help.

Ability to add communication and related records

For Content Manager Web Client, the **Add communication** and **Related Records** are now available in the Record entry form during record creation.

For a record, you can access the **Add/Show communication** and **Add/Remove Related Records** from the **Actions and Properties panel > Details** option.

Add communication

The **Add communication** is the electronic equivalent of the incoming and outgoing mail register. It enables you to log mail(s) without having to repeat a check in or duplicate the actual record that was sent. For this functionality to be available, the feature **Registered Communications** must be selected in the System Options Features page.

For each dispatch or receipt, it enables you to capture the sender and recipient(s), as well as the date, direction, mail medium and address type.

Configuration

Record Type*

Document

Add communication

Date of Communication

06/05/2024 12:00:00 AM

Communication Direction

Outgoing

Communication Medium

Post

Location Sender/Recipients

+ SENDER

+ RECIPIENT

Abbott, Peter (Mr)

Sender

Administration

Recipient

Chairman

Recipient

Figure 9: Adding communication

Add related records

The **Related Records** allows you to add record relationships to multiple records. The relationship types are **Related to**, **Copy of**, **Supersedes**, **Attached to**, **Alternatively within**, **Redaction of**, **Reply to**, or **Annotation of**.

Related Records

Related Records

G21/1

Related to

Related to

Copy of

Supersedes

Attached to

Alternatively within

Redaction of

Reply to

Annotation of

Figure 10: Adding related records

For more details, see *Record Entry Form Fields > Other fields* section in *Content Manager Web Client* help.

Content Manager MS Teams and ZFP Office/Outlook Integrations

Due to recent changes on the legacy Exchange tokens being turned off by Microsoft and providing new Nested App Authentication for Office Add-ins, you may not have been able to operate the ZFP Outlook integration (existing or new).

New setup script to create new Azure applications

From 24.3 onwards, as part of Content Manager installation, a new setup script, **az_install.ps1**, is available at the installation location (for example, **C:\Program Files\Micro Focus\Content Manager\Service_API\office\AzureScript**) to create new Azure app for Content Manager MS Teams and ZFP Office/Outlook integrations.

The administrator must use/run the setup script, **az_install.ps1**, to create new Azure app.

For more details, see *Content Manager SDK* help.

For existing Content Manager Azure App users,

For the existing ZFP Outlook integrations, perform the following additional configurations:

1. Adding the Single-page application

- a. Go to www.portal.azure.com and click **App registrations**.
- b. In the **Owned applications** tab, click on your registered app.
- c. In the **Overview** section, click **All Microsoft account users** for the Supported account types. The Platform configurations page is displayed.
- d. Click **Add a platform** and then click **Single-page application** from the right panel. The **Configure single-page application** panel is displayed.
- e. Enter the Redirect URI of the application in the text box and click **Configure**.

IMPORTANT: Make sure to add the following two redirect URIs adhering to the naming convention:

- i. `https://yourServiceAPIname/office/index.html`.

For example, `https://localhost/myserviceapi/office/index.html`.

- ii. `brk-multihub://your-add-in-domain`

For example, `brk-multihub://localhost:3000`, if you are testing your add-in on port 3000 on the localhost server.

2. Adding the permissions:

- a. In your registered application, navigate to the **API permissions** section and click **Add a permission**.
- b. In the **Request API permissions** panel, click **Microsoft Graph** and then click **Delegated permissions**.

- c. Search and select the following permissions and click **Add permissions**.

- **User.Read**

3. Updating the config.js file

- a. Navigate to the **Content Manager installation folder > Service_API > office**. For example, C:\Program Files\Micro Focus\Content Manager\Service_API\office.
- b. Open the **config.js** in a text editor and add the **APPLICATION_ID** and **AUTHORITY** parameters. For example,

```
...
DEFAULT_AUTO_OPEN: true,
SEARCH_CLAUSES: {
  Record: [],
  SavedSearch: ["top"],
},
APPLICATION_ID: "XfXffXac-XbaX-XXXc-XeXd-XXdXXeXXXXXX",
AUTHORITY: "https://login.microsoftonline.com/ZfXffXab-YbcX-XXXc-YeZd-
XZdXXeXXZZYYX"
};
```

IMPORTANT: Make sure to use `https://login.microsoftonline.com/common` as AUTHORITY if you have multiple tenants. Otherwise, use `https://login.microsoftonline.com/(tenant ID)` as AUTHORITY.

- c. Save and close the file.

IMPORTANT: For Shared mailbox and delegations

If you have existing Content Manager Azure App with Shared mailbox, you have to manually add the following permissions:

- **Mail.Read.Shared**
- **Mail.ReadWrite.Shared**

For detailed steps, see *Configuring additional permissions* section in *Content Manager Outlook Online Integration* help.

Enhanced Features

Content Manager Web Client

Enhanced drag and drop functionality

You can drag and drop an electronic document to the applicable Content Manager object on the left pane of the explorer, such as User Labels, Categories/Classifications etc, or to the record list area or to a particular container in the record list on the right pane of the explorer.

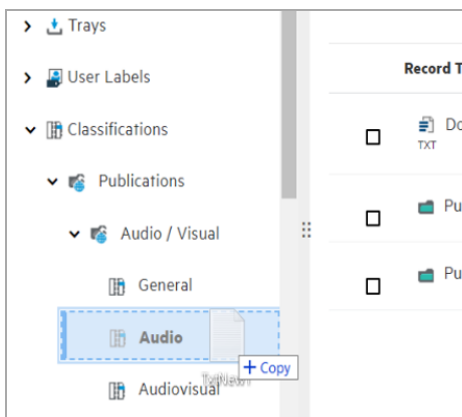


Figure 11: Drag and Drop to Classification (left pane)

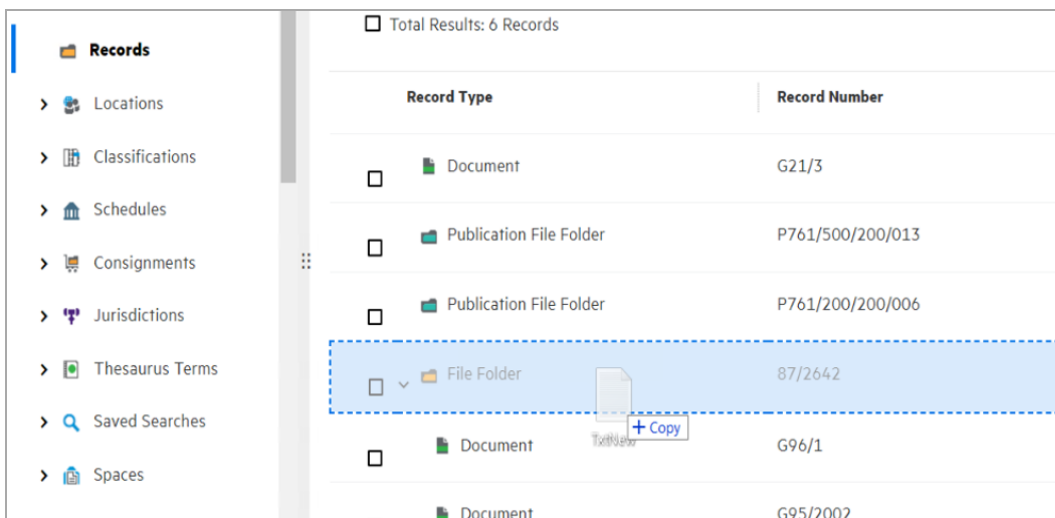


Figure 12: Drag and Drop to a container in the record list (right pane)

For more details, see *Creating New Records > Drag and Drop* section in *Content Manager Web Client* help.

Content Manager Zero Foot Print (ZFP) Office/Outlook

Auto populate Record Type or Check In Style

In Content Manager Zero Foot Print Outlook integration, when you check in an Outlook item(s) with attachments, if you want all the selected attachments to have the same Record Type or Check In Style, then select a Record Type or Check In Style at the Item Name level. This will auto populate Record Type or Check In Style for the remaining selected attachments.

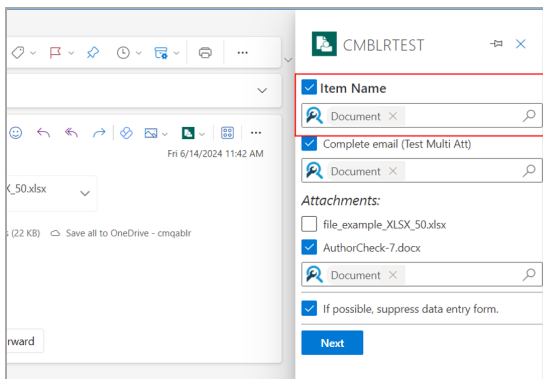


Figure 13: Selection at Item Name level

However, if you want a different Record Type or a Check In Style for each of the attachment, then select the Record Type or Check In Style from the drop-down available for individual attachment.

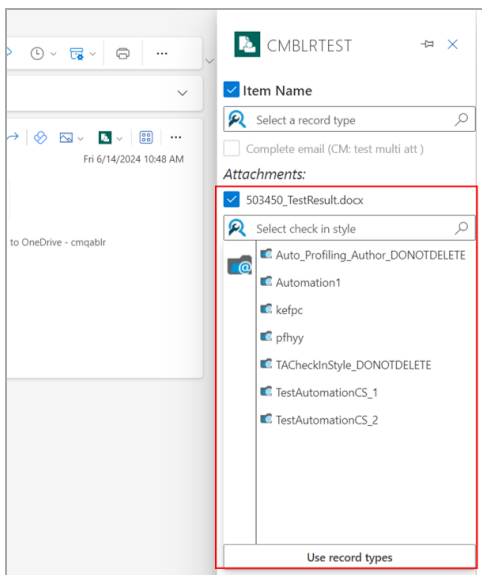


Figure 14: Selection at individual attachment level

For more details, see *Checking in Outlook items with attachments* section in *Zero Foot Print Outlook* help.

Microsoft Office Integration

Enhanced Content Manager integration option in Office Integration (Content Manager Add-in)

The **Sync Linked Folders when opening Outlook** option scans and reloads all the Linked Folders when you open Outlook. By default, this option is checked. If you have many Linked Folders, syncing Linked Folders when opening Outlook may slow down the performance. So, you can uncheck this option to sync Linked Folders only when you click the Content Manager tab and not when you open the Outlook. Once unchecked, restart the Outlook for this option to take effect.

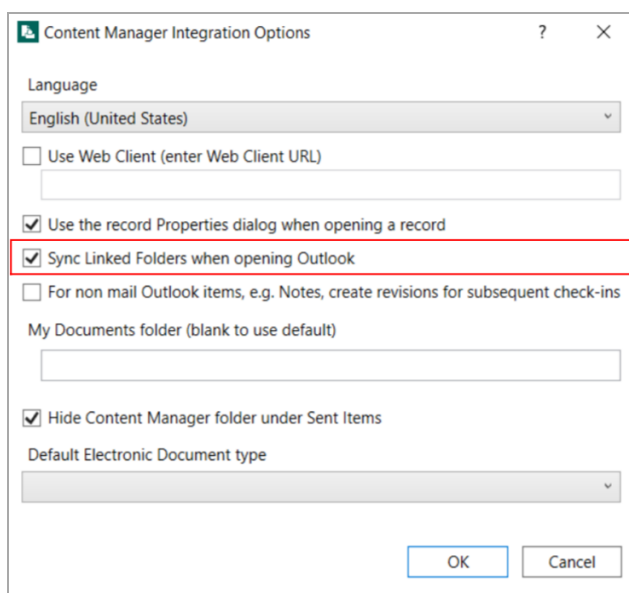


Figure 15: Sync Check In Styles and Linked Folders option

For details, see *Content Manager Office Integration* help.

Obsoleted Platforms

Refer to **CM24.3_Spec.pdf** for details on the Support Matrix.

Obsoleted Features

No features are obsoleted in Content Manager 24.3 release.