

# Content Manager

Software Version 9.4

## Release Notes



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Software Release Date: July 2022

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- 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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# Micro Focus Content Manager Release Notes

## Introduction to Content Manager 9.4

Content Manager 9.4 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. Content Manager is the cornerstone of the Micro Focus Secure Content Management Suite that provides customers the capability to lower operating costs, secure information, enhance compliance and increase productivity. Through innovation and interoperability Content Manager is transforming how business manages content across the lifecycle, helping to maintain control over this valuable asset throughout the process of creation, collaboration and mobile access.

By focusing on areas of; automatic classification and policy application - with linked security control, manage-in-place functionality, and feature rich mobile access, Content Manager will help you address areas of cost, compliance, productivity, information privacy and security.

Developed with more than 30 years of information management expertise, Content Manager 9.4 is a comprehensive, out-of-the-box software solution and a key component of Micro Focus' Information, Management and Governance portfolio.

Content Manager 9.4 is designed to the International Standard of Records Management (ISO 15489:2001), and elements of ISO16175: Principles and Functional Requirements for Records in Electronic Office Environments.

## Overview of Content Manager 9.4

This sixth patch of the 9.4 minor release includes all fixes and enhancements that were shipped in the previous releases of Content Manager. For details of the previous release, please refer to the relevant release notes.

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

For technical details, including the support matrix, refer to **CM9.4\_Spec.pdf** and **CM9.4\_Install.pdf**.

**IMPORTANT:** For Content Manager 9.4, the Web Client can only be updated (patched) from the 9.4 base Web Client install. If you have applied a 9.4 Web Client patch, you must uninstall the patch to the 9.4 base version before updating to a new 9.4 patch.

**IMPORTANT:** A critical issue has been identified in the following Content Manager 9.4x versions which may result in loss of data after upgrading:

- 9.4 Patch 3 (including 9.4 Patch 3 Hotfix 1 – build 841)
- 9.4 Patch 2 Hotfix 5 (and subsequent hotfixes up to and including 9.4 Patch 2 Hotfix 8 – build 649)

Remediation instructions have been published and can be accessed via the My Support Portal at <https://softwaresupport.softwaregrp.com/doc/KM03806113>

This issue is corrected in Content Manager 9.4 Patch 4 (this patch) and can be viewed via <https://softwaresupport.softwaregrp.com/doc/KM03806108>

It is recommended customers upgrading to Content Manager 9.4x apply this patch **before** upgrading the schema.

The authoritative list of fixed change requests included in this release can be found on [https://softwaresupport.softwaregrp.com/group/softwaresupport/search-result/-/facetsearch/document/LID/PH\\_197146](https://softwaresupport.softwaregrp.com/group/softwaresupport/search-result/-/facetsearch/document/LID/PH_197146)

## New Features

### Platform Continuance

Content Manager 9.4 introduces support for:

- Windows Server 2019
- Office 2019
- SharePoint 2019
- Kofax 11
- IDOL, KeyView and Media Server 12.3
- Elasticsearch 7.x

Included in 9.4 Patch 1:

- Exchange 2019

RDBMS support:

- SQL Server 2017
- Amazon RDS for SQL Server

Included in 9.4 Patch 1:

- SQL Server 2019
- Oracle 18C and 19C

### Feature Deprecation

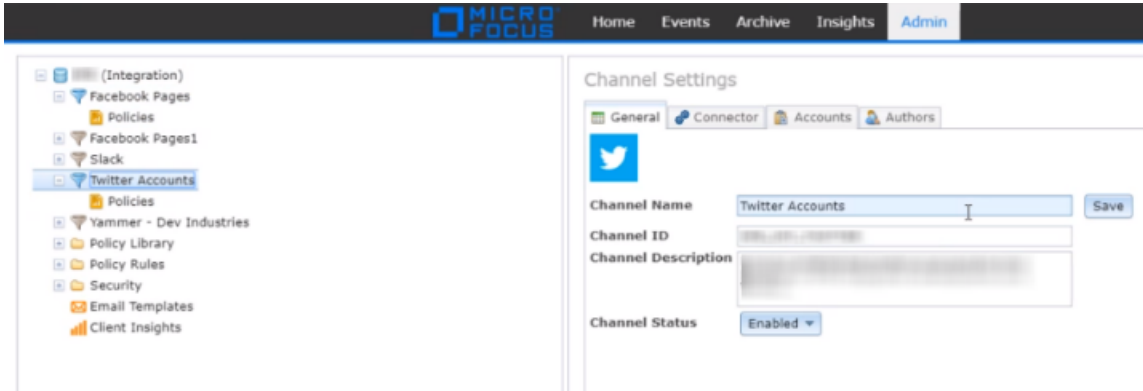
From Office 2016, Microsoft implemented changes to the way Office handles linked/ compound documents, as a result the ability to manage these documents in Content Manager 9.4 has been removed.

## Content Manager

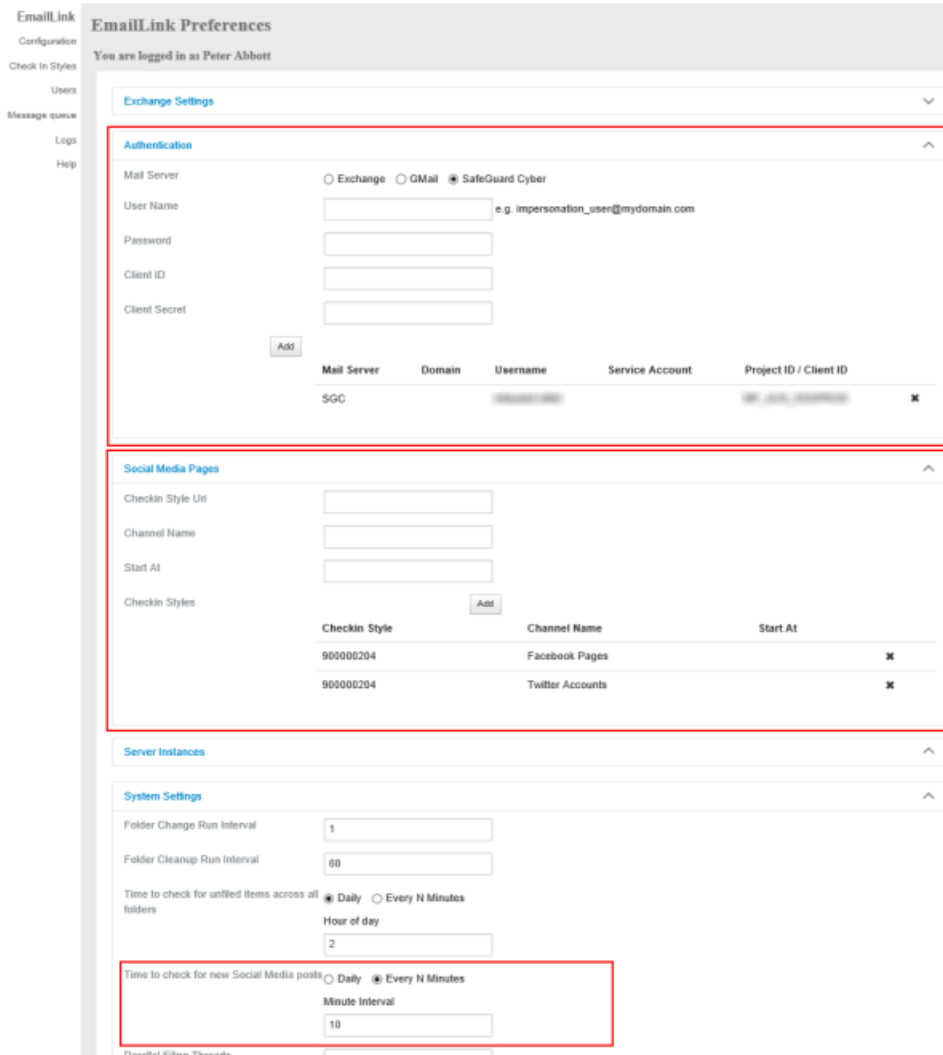
### Integration with SafeGuard Cyber

From 9.4 Patch 1, using the Content Manager EmailLink module, organizations can now enable and configure an integration between Content Manager and SafeGuard Cyber. This integration enables the seamless capture and archiving of posts from social media, collaboration channels and mobile chat apps to Content Manager.

### Configuration in SafeGuard Cyber

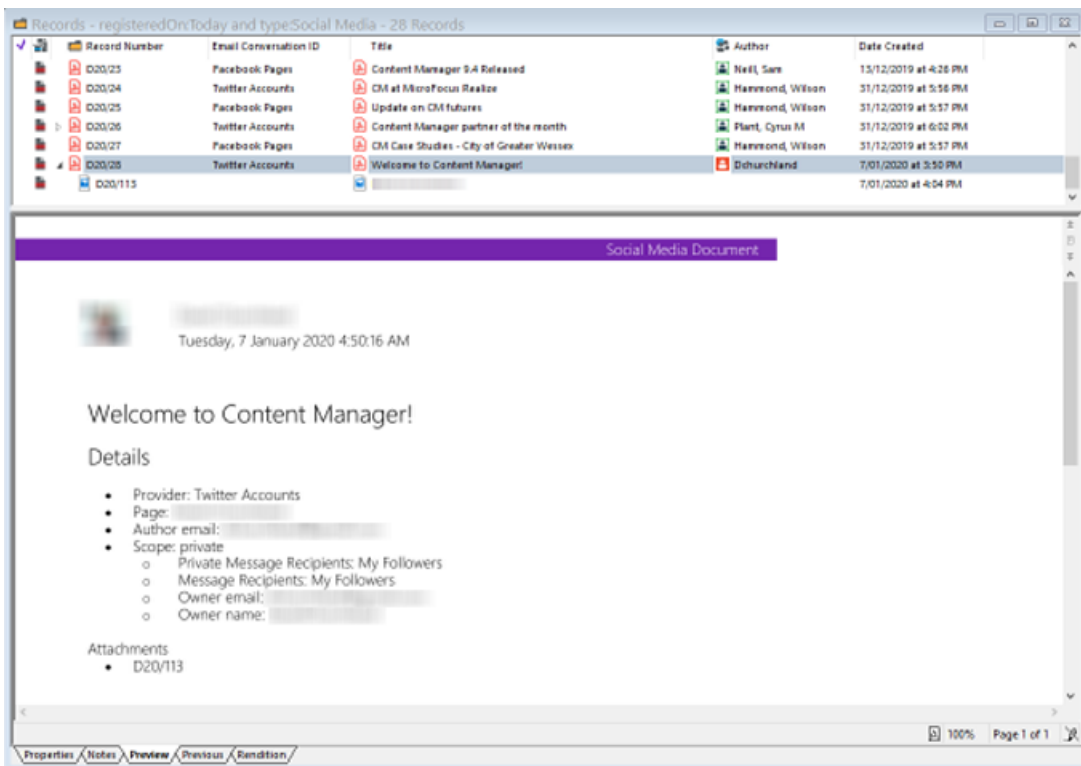


### Configuration in Content Manager EmailLink





## Captured records in Content Manager

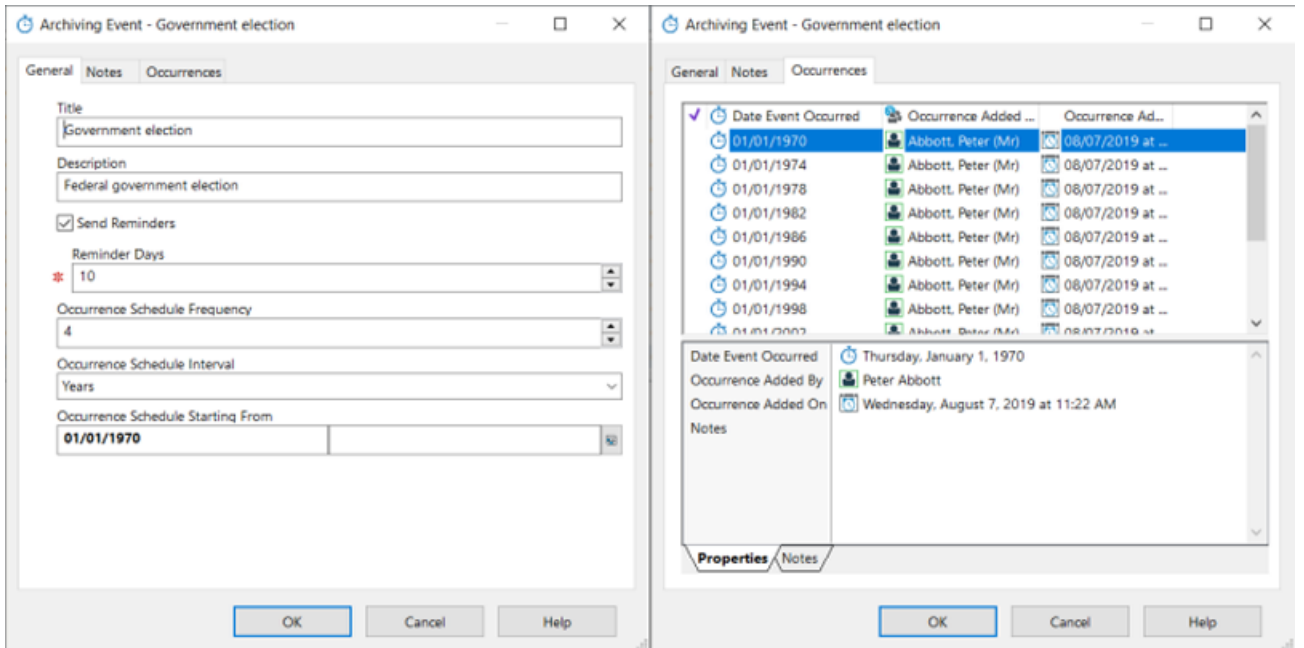


## Event Based Archiving

Content Manager 9.4 introduces a new trigger method for retention schedules - **Archiving Event**. Based on real-world events, such as a change of Government, the disposal of records can be invoked manually or automatically based on the event occurrence. The feature, **Event Based Archiving**, must be enabled in the **System Options - Features** page to use this new feature.

The Archiving Events must be created before they can be linked to a retention schedule. The option, **Events**, is found on the **Manage** tab, in the **Archiving** group. There are 3 archiving event types that can be created:

- **Occurs only once** - this is an event that occurs only once. The occurrence date is set on creation.
- **Occurs many times, irregularly** - this is an event that occurs multiple times but the date of occurrence may not be known at the time of creation. It is assigned when it's determined.
- **Occurs according to a specified schedule** - this is an event that has a known occurrence period. The frequency is defined on creation.



Once the event has been created, it can be associated with a retention schedule as a trigger.

**New Trigger**

Trigger Type  
Archive (Transfer Custody)

Occurs

0 Years    1 Months

0 Days

Without any delay

After

Archiving Event

Archiving Event  
Government election

First occurring after record date:  
Date Closed

Round Dates To  
No Rounding

Transfer custody to Location  
Storage Provider A

Jurisdiction

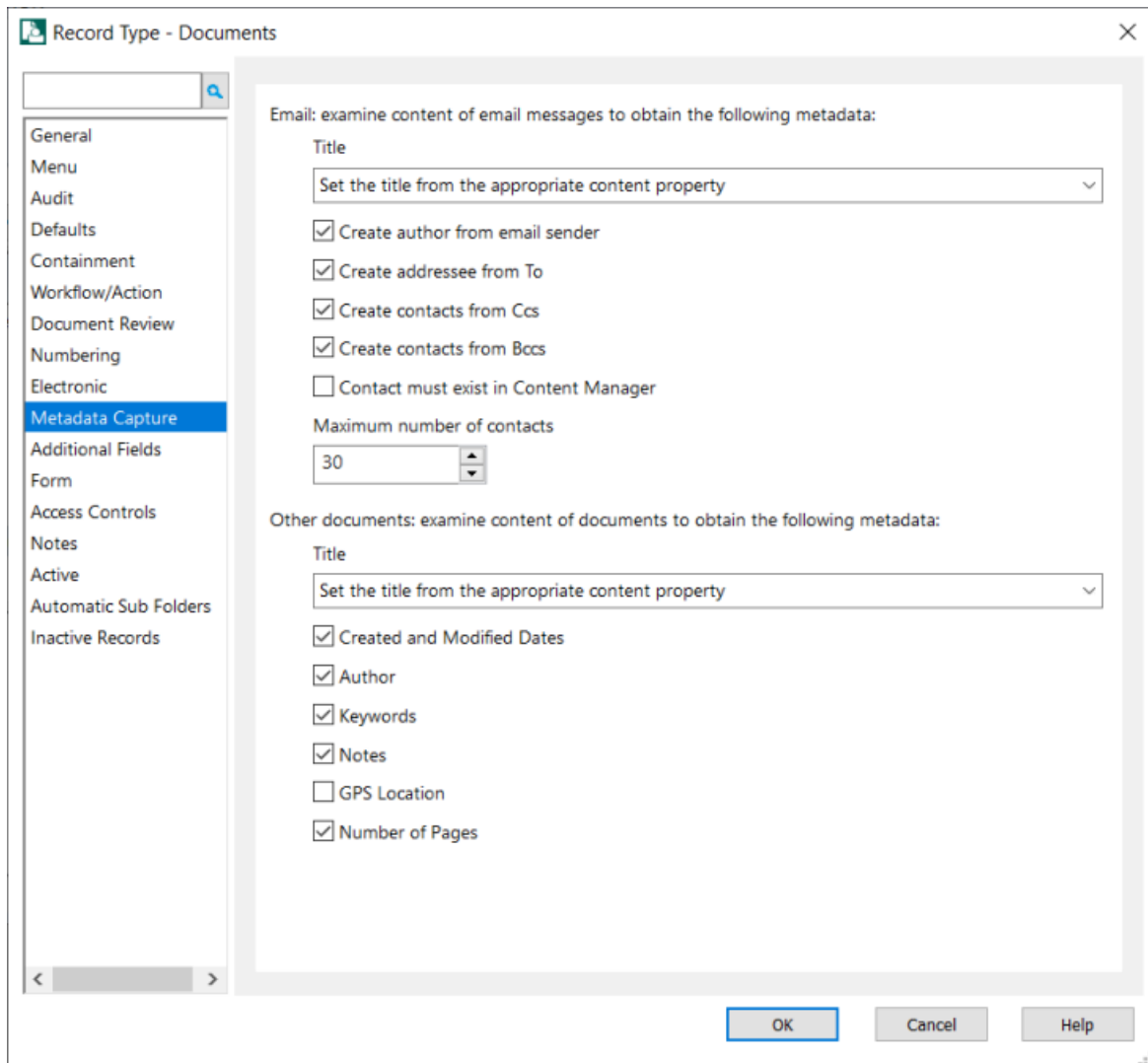
OK    Cancel    Help

When the next event occurrence takes place and required date metadata is updated, the record will be triggered for the required disposal action.

## Metadata Capture

For record types that support the creation of electronic documents, on the record type, you can define the settings to determine how the document metadata is extracted from electronic documents that are checked into Content Manager via drag and drop, document queues and from Offline Records.

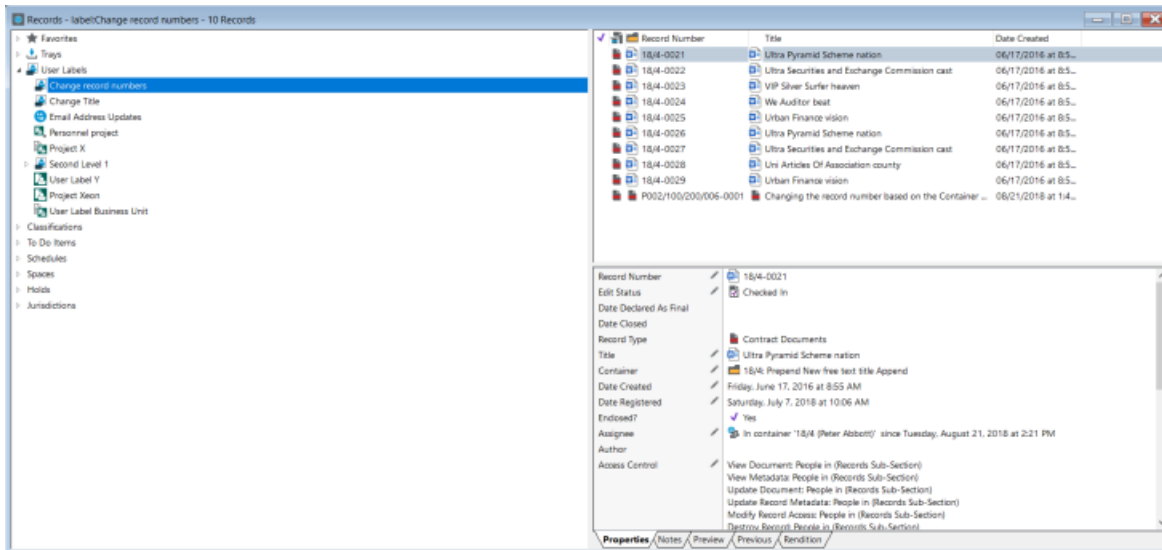
The settings are applied on the record type properties - Metadata Capture page.



The options are applied to email items and/or other documents, such as Microsoft Word and Excel.

## Content Manager Explorer

The new Explorer window gives users a hierarchical view of records grouped within Content Manager item types in a single window.



The Explorer option is available on the **Home** tab, in the **File** group, and it can also be set as a Startup window via the **User Options - Startup** page.

The available Content Manager item types that can be displayed in the Explorer window are:

- Favorites
  - Locations
  - Classifications
  - Schedules
- Trays
  - Recent Containers
  - Recent Documents
  - Records Work Trays
  - Records In
  - Records Due
  - Records In or Due
- User Labels
- Classifications
- To Do Items
- Schedules
- Spaces
- Holds
- Jurisdictions

The displayed items can be customized by the user, or set as a Global Setting by a Content Manager Administrator.

## Content Manager Dashboard

A new Dashboard window is available in Content Manager 9.4. Organizations can opt to use this feature by enabling or disabling the **User Dashboard** option in the **System Options - Feature** page.

The Dashboard option is available on the **Home** tab, in the **File** group, and it can also be set as a Startup window via the **User Options - Startup** page.

The Dashboard allows users to access pre-defined work item lists with a breakdown of the number of items that are within the set time periods, including a total number of items for each work item list.

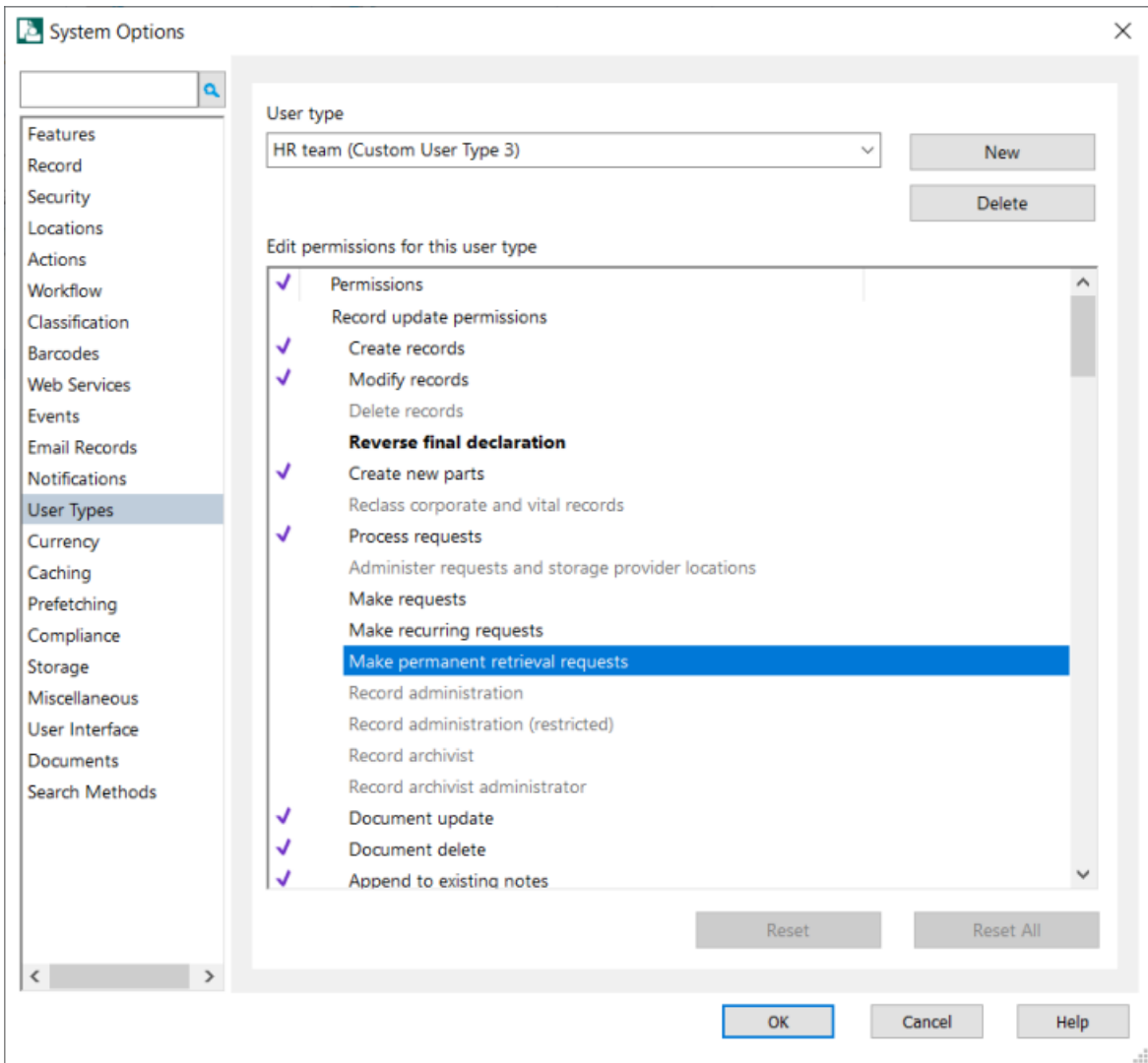
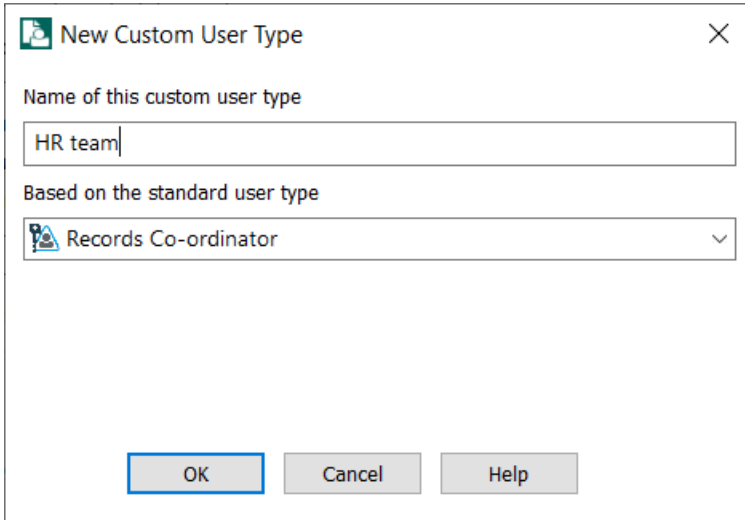
By double clicking on the displayed number under the time period column, users will be able to quickly access the items that are associated with that work item in that time frame as Content Manager will open the items in a new search results window, where the user can then update/action the items as required.

Work items	Overdue 31+ days	Overdue 0-30 days	Due 1-30 days	Due 31+ days	Total
Records assigned	316	59			375
Records to be returned					0
Records requested	17	4			21
Documents checked out	1	2			3
Documents to edit	81	23			104
Documents to review	20	2			22
Documents to authorize	56	8			64
Record Actions	1				1
Activities	2				2
To Do Items	6				6
Classifications to approve					0
Consignments to review	2				2
Consignments to approve					0
Consignments to dispose	10				10
External Workflows					0
<b>My team</b>					
Abbey, Rhonda Mary (Me)					
Records assigned	36	3			39
Records to be retur...					0
Records requested	1				1
Documents checked...	1				1
Documents to edit					0
Documents to review	1				1
Documents to auth...	5				5
Record Actions					0
Activities	1				1
To Do Items					0
Consignments to ap...					0

## Custom User type

Administrators now have the option to create up to 10 custom user types, in addition to the 6 standard user types available. This feature gives organizations the opportunity to create unique user types with specific user permissions to better suit their business requirements. These custom user types are associated to locations in the same manner as the standard user types, via the location properties **Profile** tab.

The creation of custom user types is done in the **System Options** on the **User Types** page. A base standard user type is selected for the custom user type and then the required user permissions are enabled or disabled as required.

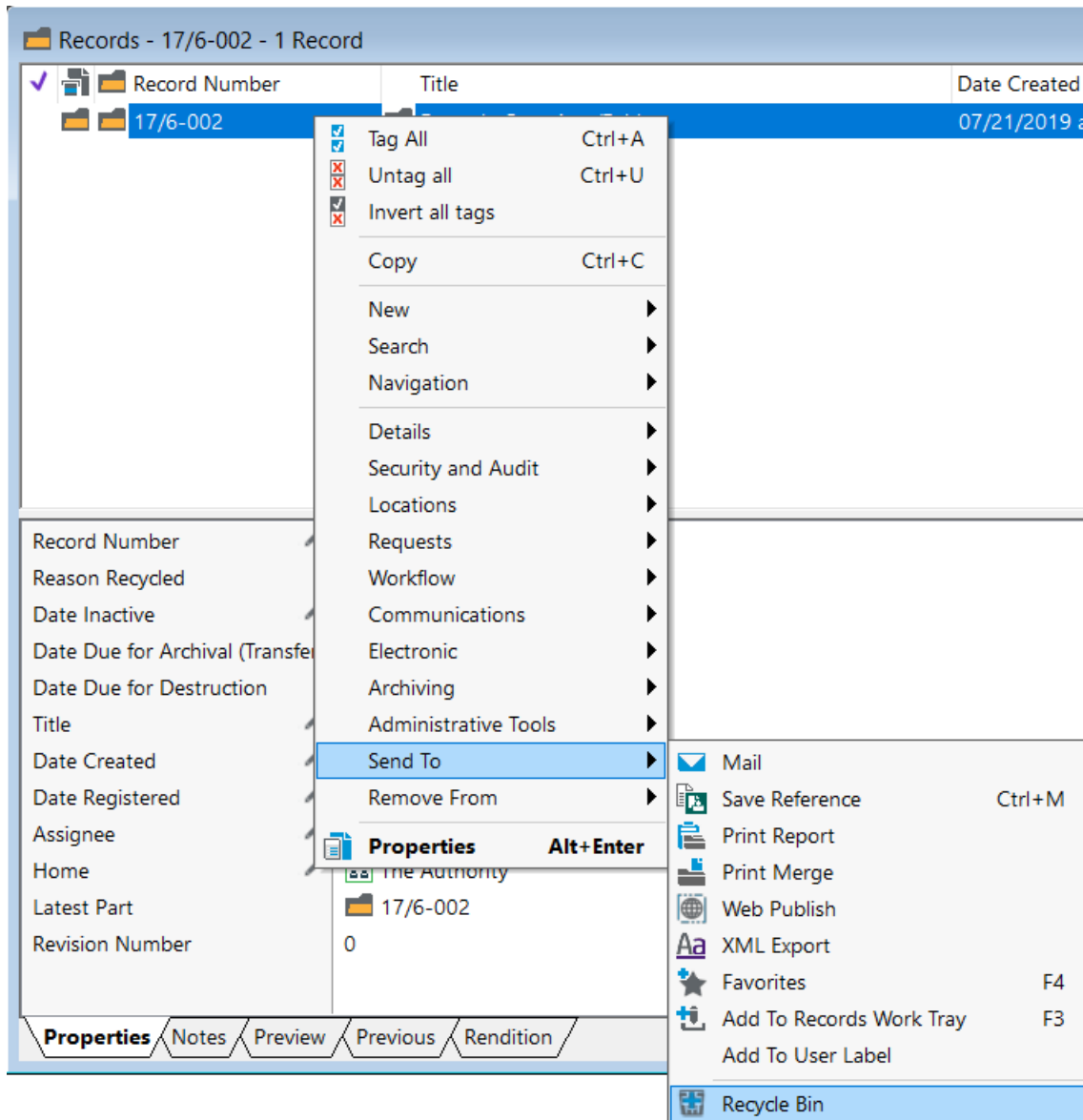


## Recycle Bin

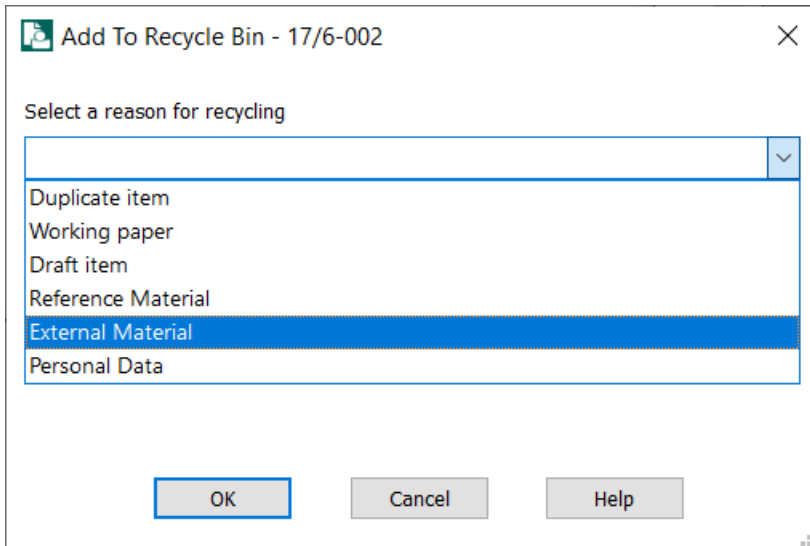
This feature allows end users to send a record or a selection of records that they have created in error or as a part of normal administrative practices to the Content Manager Recycle Bin, where they can then be reviewed by an Administrator to either be deleted or restored.

For this feature to be available, the **Record Recycle Bin** feature must be enabled in the **System Options - Features** page.

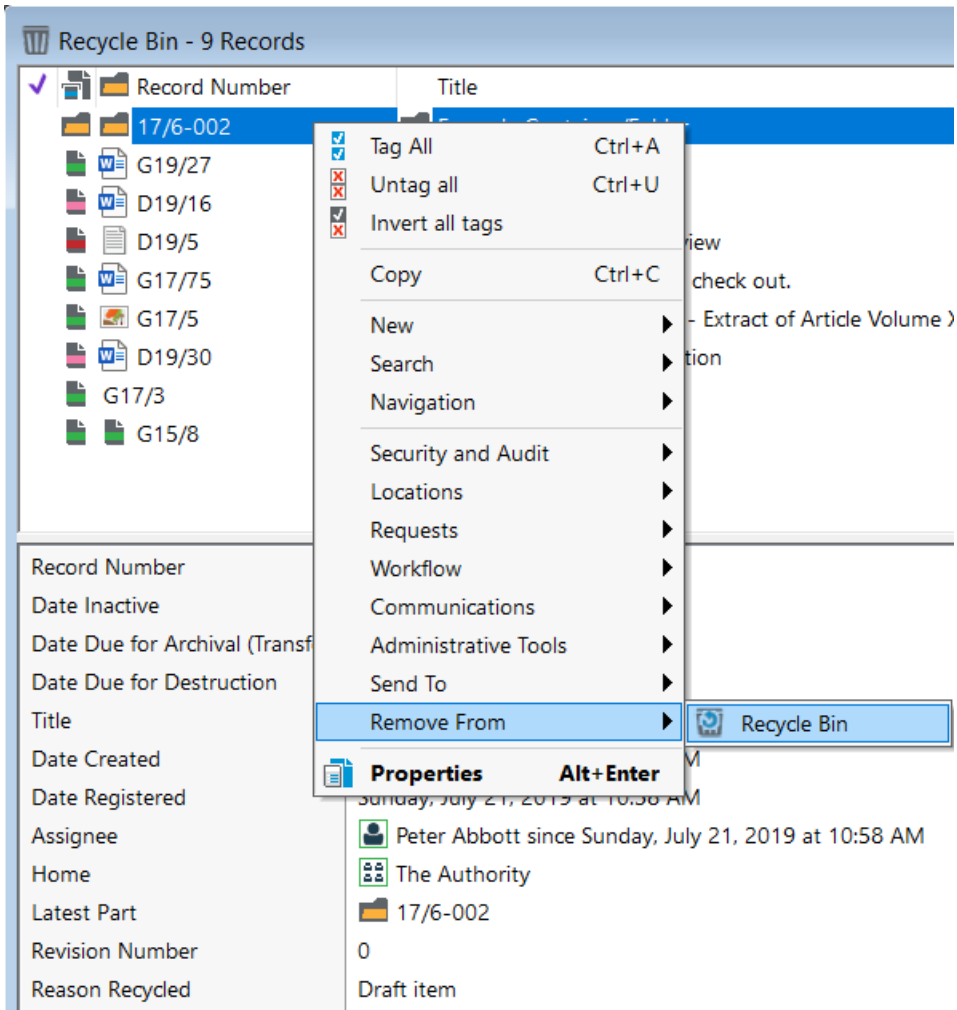
Users with the Recycle Bin user permission will be able to send record(s) to the Recycle Bin from the right-click menu, **Send To - Recycle Bin**. As a part of the recycling process, the user must select a reason for recycling. There are currently 5 reasons but a Content Manager Administrator has the ability to add additional reasons using the **Caption Editor**. Once records are sent to the recycle bin, they will no longer appear in any search results.







Records that have been recycled can be accessed only via the **Search** tab - **Records** - **Recycle Bin** option. Records that are in the Recycle Bin cannot be modified by any user. Records can be removed from the recycle bin by either the user who created the record, or if a user has the required user permissions, they will be able to remove any record in the recycle bin if they feel it should not be deleted. Records are removed from the recycle bin by the right-click menu, **Remove From - Recycle Bin**.



Records can be deleted from the recycle bin, and Content Manager, by users who have **Delete records** permissions, or it can be set up as an automated process by defining a time frame on the **System Options - Record** page, **Automatically empty the record recycle bin** every <user defined> days and by running the **Empty Record Recycle Bin** event processor.

## Visitor access

In Content Manger 9.4 it is possible to register users as visitors without requiring an MSP license.

A visitor, in this instance, is a user who has login access to a Home dataset but also has requirements to log into other datasets that are defined on the same Enterprise Studio instance without being included in the license count for the dataset they're visiting.

At the time of login to the dataset where the user is a visitor, the following checks are undertaken:

- the home dataset must be specified and it must be registered on the Workgroup server that the user is accessing.
- the user must have a valid login for their home dataset.
- the user cannot be a guest or a visitor on the home dataset.

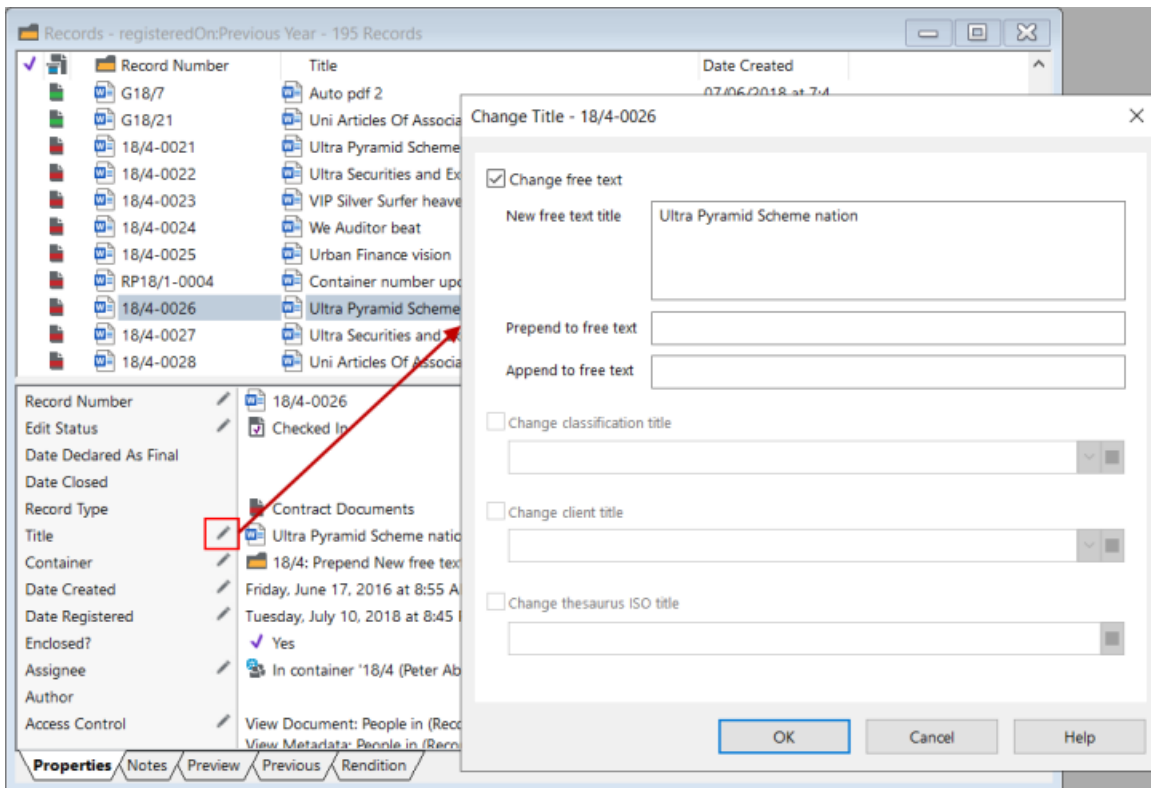
- the user's User Type on the home dataset must be equivalent or higher than the user's User Type on the visiting dataset, e.g. if they require administrator access to a visiting dataset, they must be an administrator in their home dataset.

Users are flagged as a Visitor account via the **Location - Profile** tab.

## Editing Record Metadata from the View Pane

In this release, users with appropriate permissions will have the option of editing record metadata fields from the record view pane, as well as the right-click menu.

In the view pane, fields that can be edited will have an Edit button available next to the caption name, and when clicked it will display the relevant metadata property dialog box which the user can then update and save.



## External Workflow Integration

The new External Workflow integration option allows organizations to create links to external workflow applications. This integration initially is linked to Objective's Perform application.

The feature, **External Workflow Types**, must be enabled in the **System Options - Features** page to use this new feature.

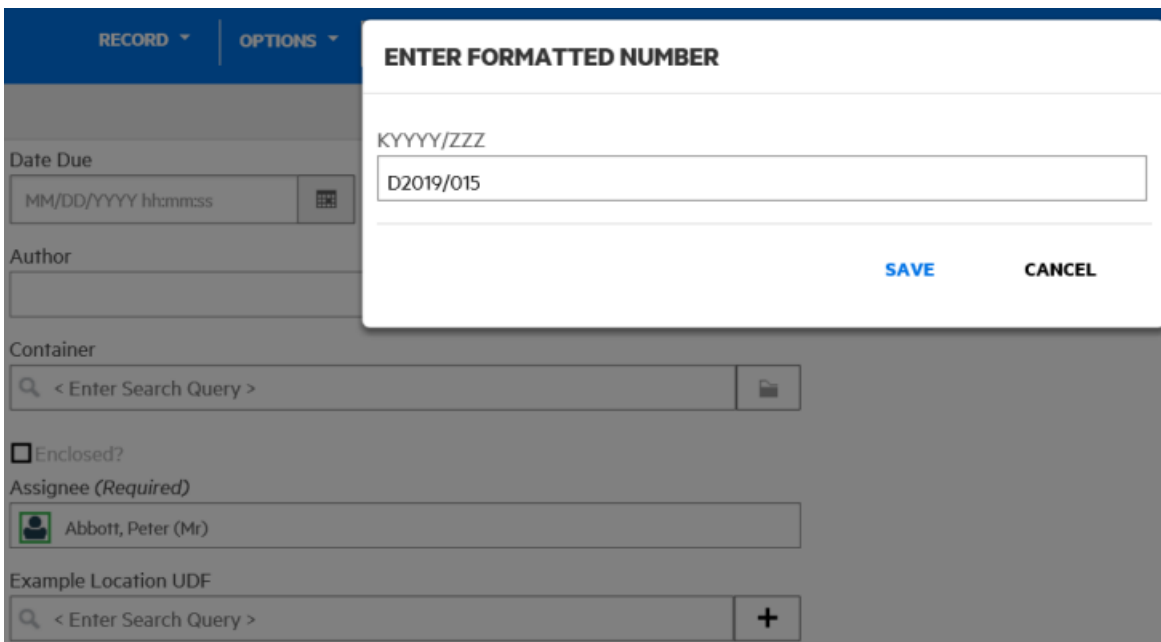
When enabled, organizations can set up External Workflow Types, linking Content Manager and the external workflow application, setting the required defaults for any associated record creating and behaviors.

From the Home tab, in the External Workflow Type group, new external workflows can be started, either without an initiating record, or with, depending on the External Workflow Type requirements. Once created, the integration will update Content Manager as the external workflow is processed.

## Content Manager Web Client

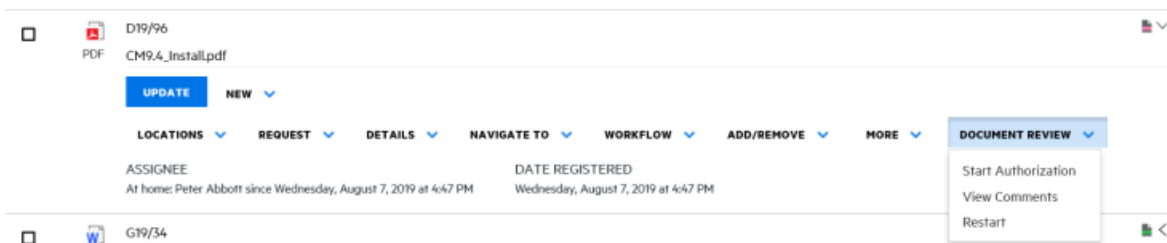
### Manual numbering

Support for the creation of records using a record type that requires manual numbering is included in the Web Client for 9.4. When a record is saved, the user will be prompted to enter the required number, based on the record type numbering pattern set in the client.



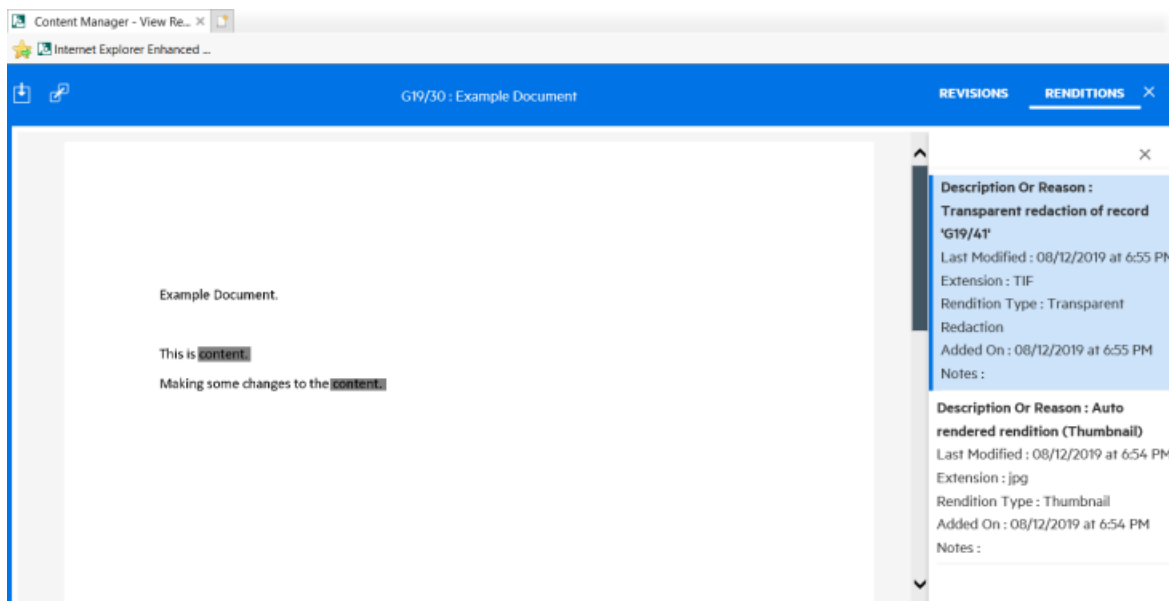
### Document Review and Authorization

Records that are a part of a document review and/or authorization process can now be updated in the Web Client. Editors can start the review and/or authorization process, and reviewers/authorizers can update the record to indicate they've completed their part of the process.



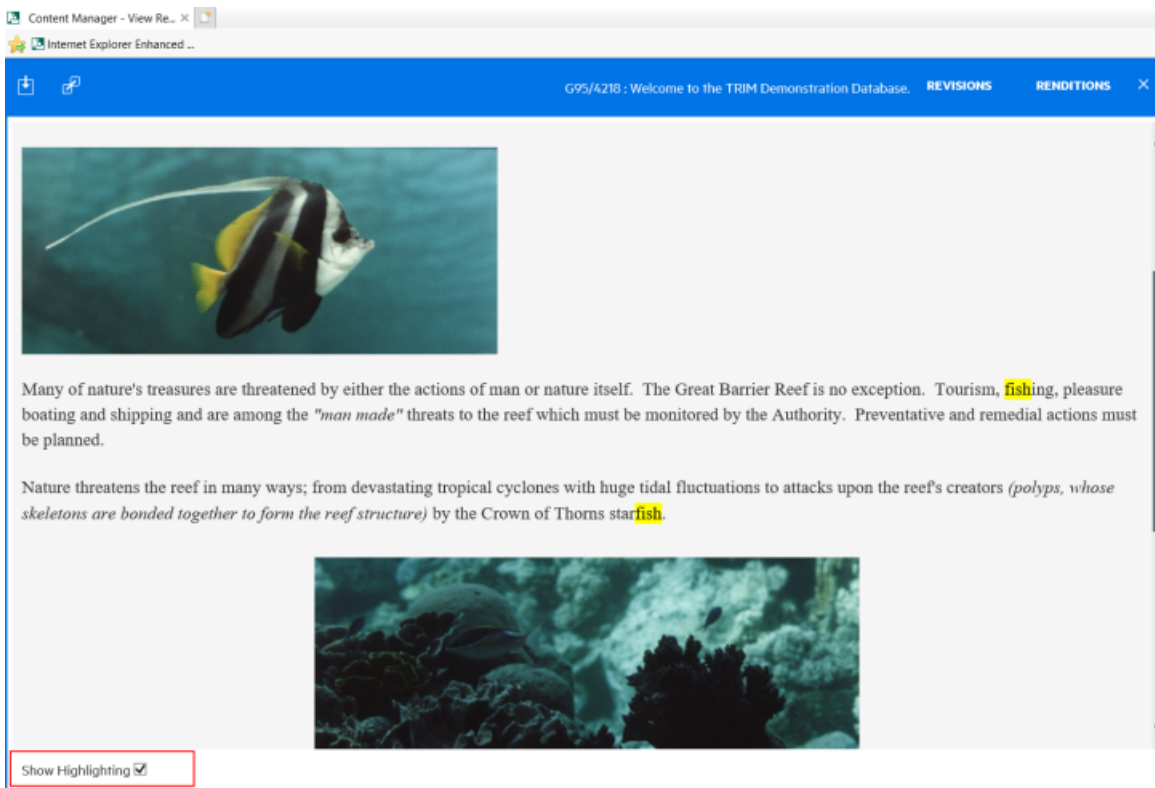
## Support for viewing Renditions

On the Preview panel in the Web Client, records that have renditions attached, will now show a Renditions tab. Using this tab, users will be able to view the attached record renditions.



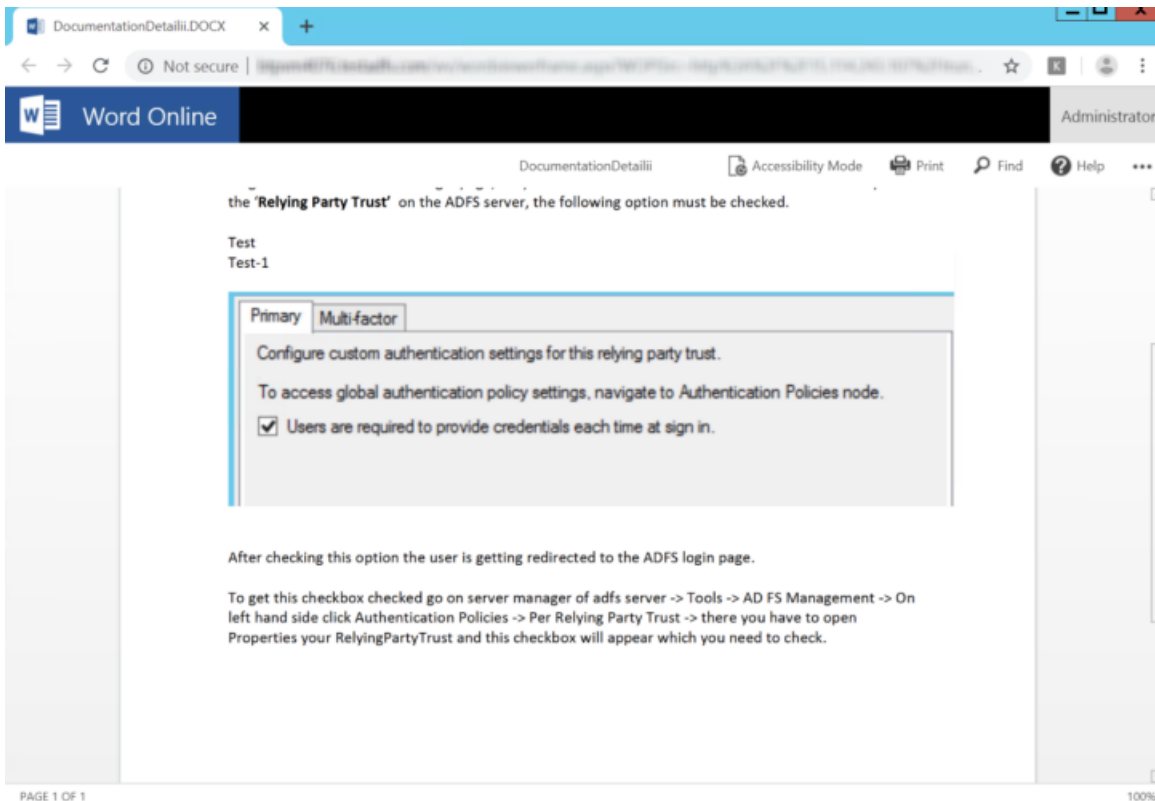
## Hit Highlighting in the Preview panel

When records are searched for using the Document Content search method, when a record is viewed in the Preview panel, hit highlighting can be enabled to easily see references to the Content search term in the document preview.



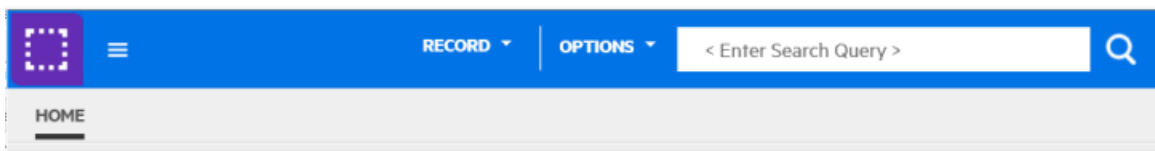
## Support for viewing Office documents via Office Online

For organizations that are using the Office Online check out and edit option, users can now preview their records using Office Online, rather than the Web Client Preview panel. This allows a familiar interface for users to view, and then if required, edit their documents.



## Custom Logo Support

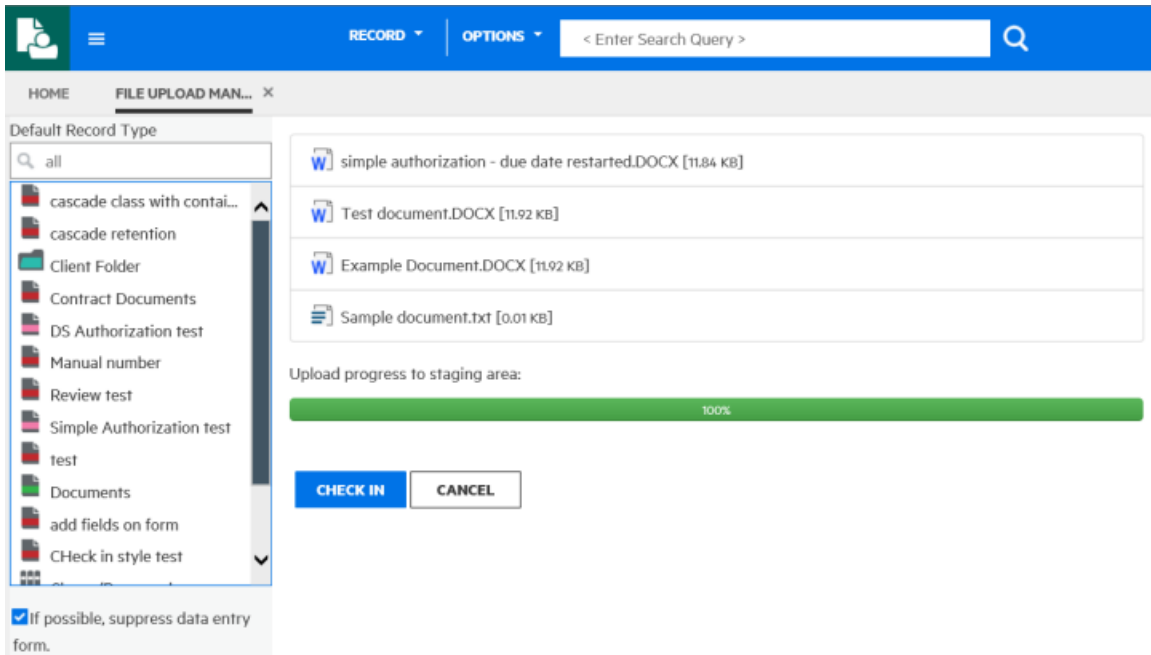
Organizations can now replace the Content Manager logo with their own logo. This is done by replacing the existing Content Manager logo file, **CMLogo.png**, in the installation Content\img directory, by default the path is C:\Program Files\Micro Focus\Content Manager\Web Client\Content\img, with a new logo image.



## Creation of multiple records via Drag and Drop

Users can now be able to select multiple files and drag and drop them onto the Web Client interface to check the documents into Content Manager.

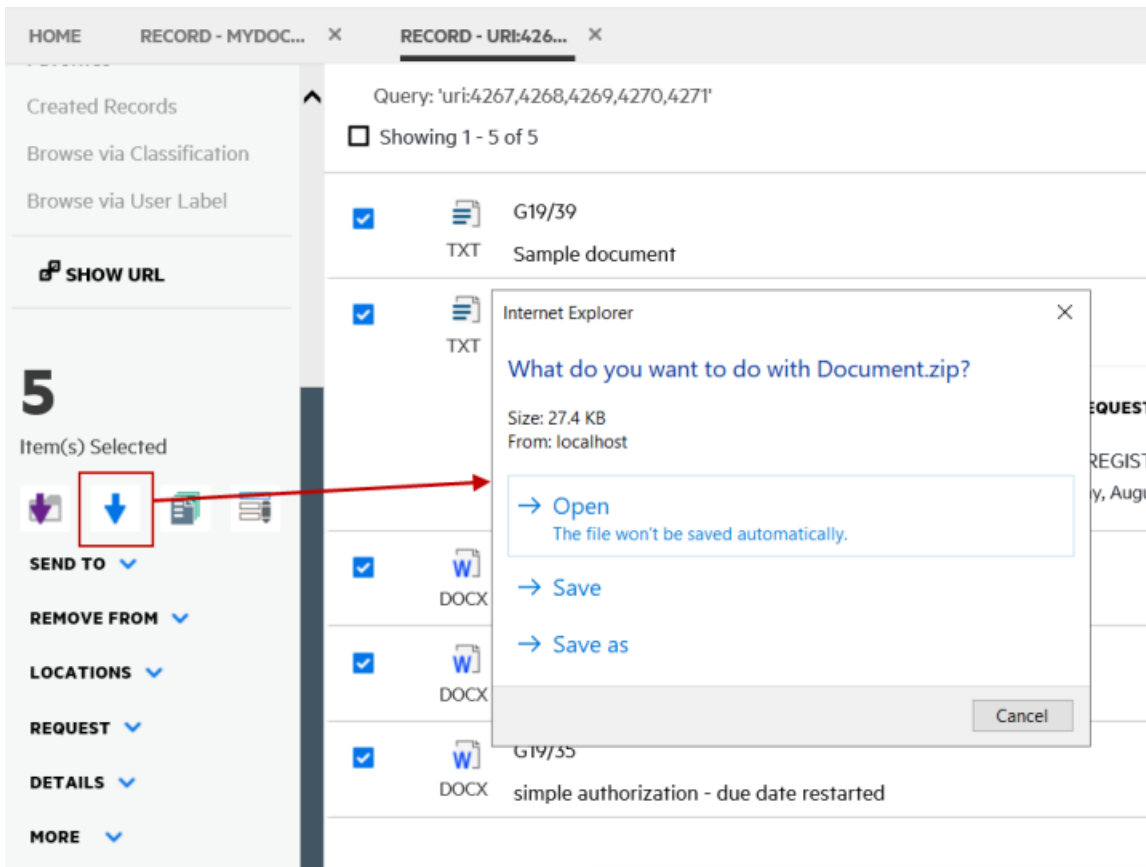
When the user drops the selected files onto the Web Client interface, the File Upload Manager page is displayed. Users will select the required record type for check in, and can opt to suppress the data entry form, which will check in the documents without user interaction, if possible.



## Download Multiple Files as a Compressed file

If users have a requirement to share a set of electronic documents, these can now be downloaded as a single action, rather than having to do it individually. When multiple documents are selected, the download document option will automatically compress these documents into a ZIP file, and the user will be prompted to save the ZIP, rather than having to download and save the individual documents.





## Microsoft Office Integration

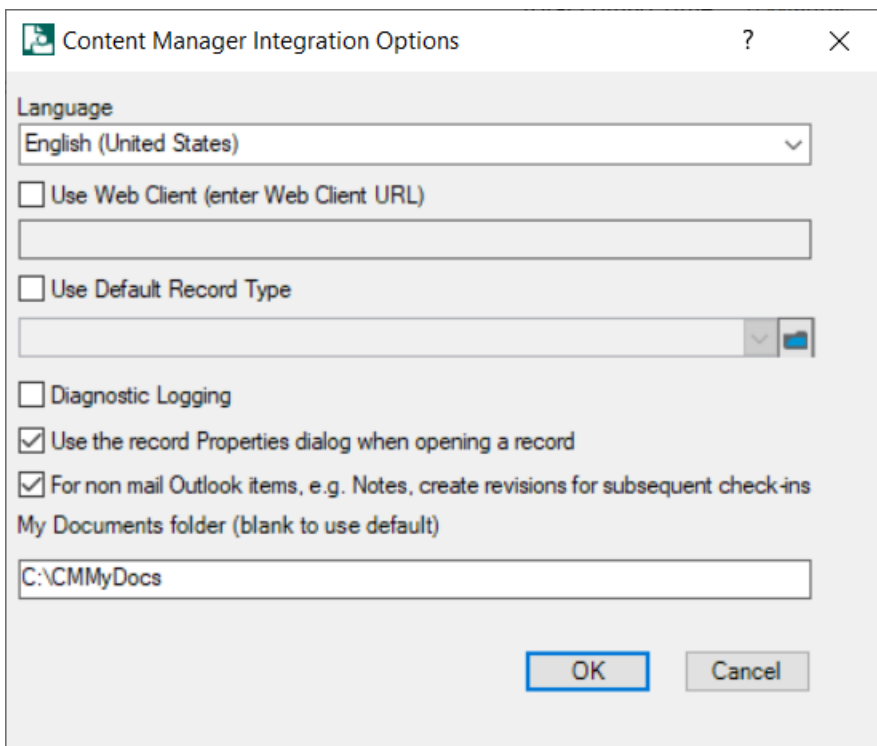
Several new options have been included in the Office integration.

Previously the Office integration stored its working files in the folder [My Documents]\Micro Focus CM. This was problematic as other applications, such as OneDrive, may take ownership of the [My Documents] folder and lock the files in that folder.

A new default location for the Office Integration working files is %appdata%\Micro Focus\Content Manager\DBID\OfficeCheckouts.

Rather than using the default staging path for the Office integration, users can now set their own "My Documents folder" via the Content Manager Options dialog, or it can be rolled out as a Registry Key (note not supported for the Thin Office integration). This option will define where documents from integrated Office applications will be staged while they are in a Checked Out state.

Users can now opt to create revisions for non-mail Outlook items, such as Notes, for those items that have already been checked into Content Manager.



As a part of the a Check In Style properties, users can now opt to only catalog the attachments of email messages that are checked into Content Manager using the Check In Style. Default Alternative Containers, Address and Author metadata can also be set on a Check In Style in 9.4.

**Check In Style** ? X

Name  
Check in attachments only

Record Type  
Documents

Container  
19/1-002

Alternate Container

Addressee

Set Default Author Option  
No Default

Specific Author

Show check in dialog  
 Delete after check in  
 Only catalog the attachments of email messages

Link Outlook Folder(s) to Check In Style

Add Remove

Link.ed:Outlook

OK Cancel

## Enhanced Features

### Changes to the Installation processes

The installation files have been redeveloped in 9.4 to simplify the installation process. There are now MSIs for a client install, including a 'per user' installation if required, as well as a server install. This will allow easier deployment of the client and will allow the client install to evolve separately from the server install going forward.

The MSI properties that were historically required for dataset configuration are no longer supported, for example, PRIMARYURL, DEFAULTDB. If there is a requirement to configure Content Manager datasets as a part of deploying the client installer, a new mechanism is available which requires the editing of an XML file included in the installer.

The new client install supports a named instance concept, which allows you to install Content Manager 9.4 without having to uninstall older versions of Content Manager. As a result, you can now run the latest version of Content Manager side-by-side with an older version on the same machine.

The installation package has also been updated. In the past, the installation package has been delivered as an ISO image. From 9.4, it will be delivered as a compressed ZIP package.

See [CM9.4\\_Install.pdf](#) for the installation and configuration details for the 9.4 release.

## Content Manager

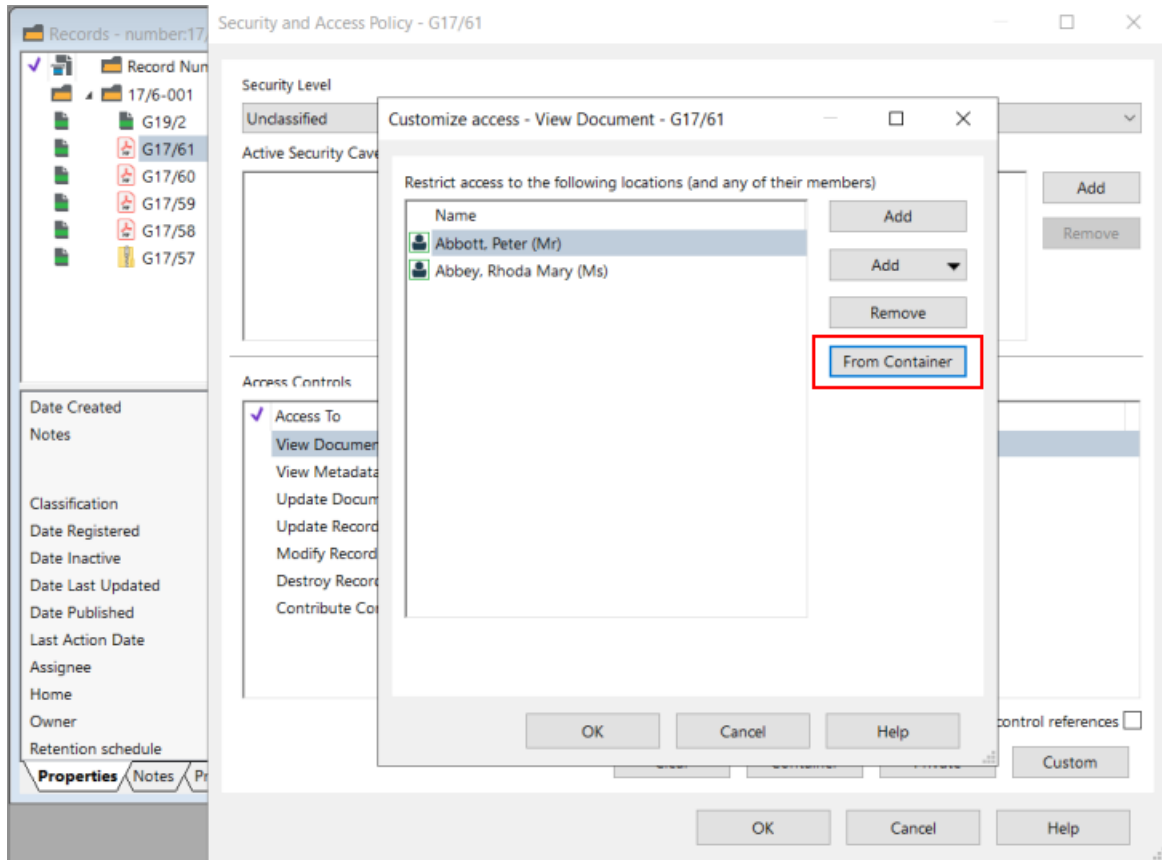
### Security and Access

#### Access Controls

Access Controls can now be added to:

- User Labels
- To Do Items
- Workflow Activities
- External Links

When applying custom access controls to a record that is contained within a container a new option is available, **From Container**. This option will copy the location(s) in the container's access control to the access control of the record being updated.



## Auditing

When viewing the Content Manager Audit logs, \*.talf, in the Content Manager Audit Log Viewer, a new Search option has been included which enables users to search for particular event in an audit log file.

User log in and log out activities can now be captured as a part of the active audit log.

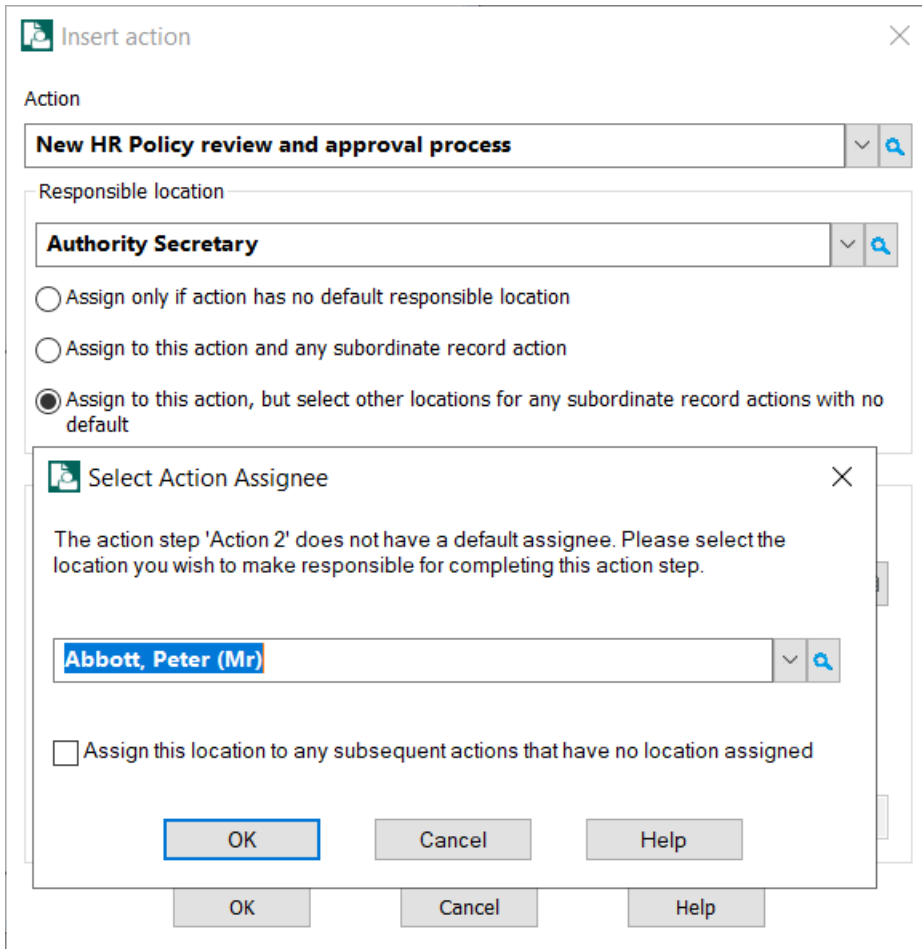
## Workflow and Action tracking

### Action Tracking

Multiple actions can now be removed from records. By searching for the actions using the Records Action object type, users can find actions and then remove them from the records they're associated to.

For organizations that are using consignments for their record disposal, a new option has been included as a part of the Archivist Review process. If a consignment cannot be completed due to records having incomplete actions attached, the actions can easily be removed from the records using the right-click **Remove Incomplete Actions** options, thereby allowing the consignment disposal process to continue.

When an action is added to a record, a new option has been added to assign the nominated responsible location to only the selected action, but other locations must be assigned for any subordinate actions that have no responsible location. When the action is saved, the user will be prompted to assign the responsible location for each action that has no default.



### Workflow

A new search method for workflow activities is included in 9.4. This search, **Activities Due**, can be found under the **Search** tab, in the **Find** group, in the Activities drop down list. This search will retrieve all activities that are due to be completed, and in combination with two new **Search for Activities Options**, **Include any activities escalated to you** and **Include any activities awaiting your authorization**, it will also retrieve any activities that have been escalated to you for action and/or any that require your authorization.

Users can now also select multiple activities that are due for completion and set them to a Completed state in a single update. If a user has delegated locations, the delegated locations can now complete activities on behalf of the responsible location.

Users can now customize their Content Manager ribbon to include Activity commands. This provides users an opportunity to include the commands they use frequently use for Workflow activities to a custom group enabling them easier access.

### Additional Fields

Additional fields that have a type of Record, Schedule, Classification and Thesaurus Term can now be created and associated to Content Manager objects to enable organizations to link different object types.

Additional validation options have been included in Content Manager 9.4:

- For string based fields:
  - Validation for a valid Internet URL and or Internet Email Address
  - Require values only from a Lookup Set
- If the Additional Field is associated to an add-in, restrict editing to only using the KwikSelect
- If an Additional Field is associated to a Record Type, a default value for an additional field can be set on the Record Type Additional Fields page. This value will override the default value that is set on the additional field properties.

## **Archiving**

Improvements to the Content Manager Archiving features have been included in this release. An option to remove record metadata when a record is destroyed is now available.

Disposal action for selected Records - G19/34

Disposal Other Contents

Change the disposition to

Destroyed

Remove record metadata on destruction

Change the consignment number to

Automatically enclose any contents

Continue processing the contents even when items fail

If the record is in a container then:

Remove this record from its container.

Cancel the disposition change

Proceed with disposition change regardless

New home when making custody or container changes:

Set to location

The Authority

Use Custody Transfer location from trigger if available

Set to space

Leave the home unchanged

View disposition schedule...

OK Cancel Help



Perform Disposal

Delete the electronic document

Delete the electronic document and the record metadata

---

Log File record type

Documents

Log File container

19/1-002

Do a final review

Review now

Configure logging

---

OK

Cancel

Help

When using the **Advanced Archiving** feature to create New Transfer consignments, users can now opt to use the location defined in the associated Retention Schedule's **Transfer Custody** trigger, if applicable.

**New Transfer Consignment**

General Selection Approvals

Number  
123123

Description  
Transfer custody to external storage location

Responsible Archivist  
Abbott, Peter (Mr)

Transfer To location  
Storage 1

Use location from schedule if specified

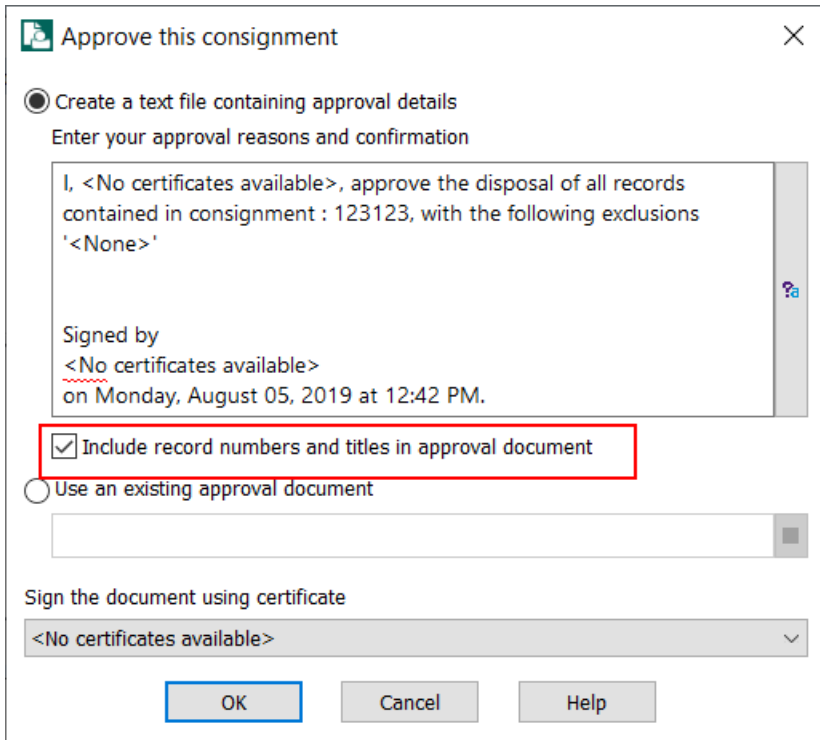
Cutoff Date  
05/31/2021

Render records to long term storage format (PDF)

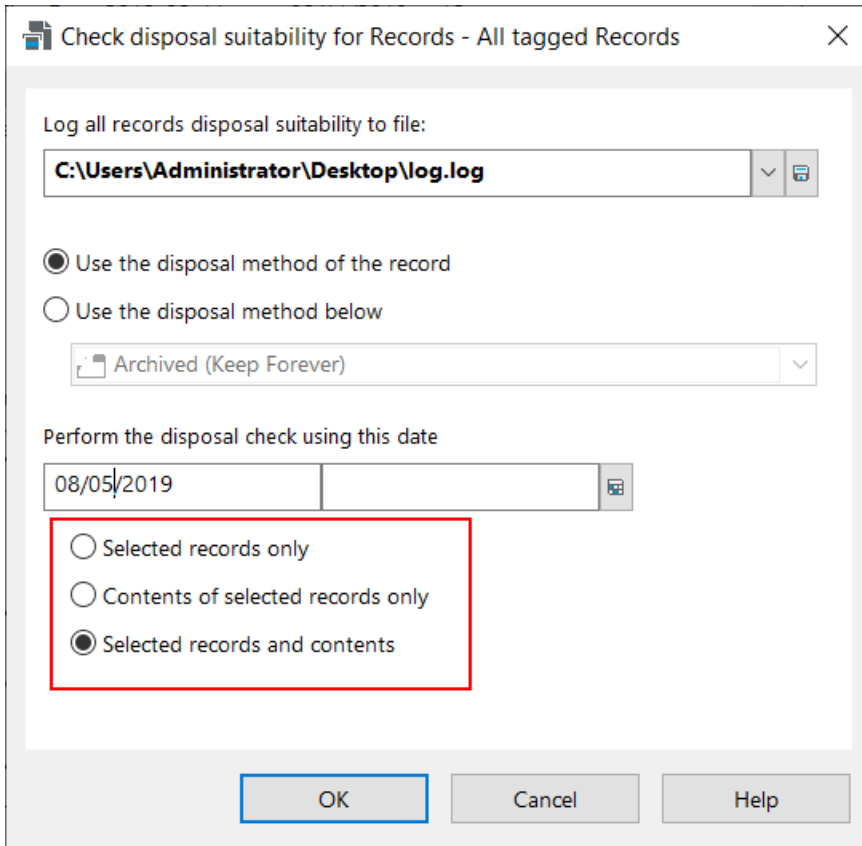
OK Cancel Help

The locations that are responsible for approving consignments can be sent an email reminder from the consignment object. Using the right-click **Owner Approvals - Send Reminder** option, an email reminder will be sent to all Owners who are a part of the consignment approval process.

For consignments that require a digitally signed approval document as a part of the approval process, consignment approvers can now include the record numbers and titles in the approval document.

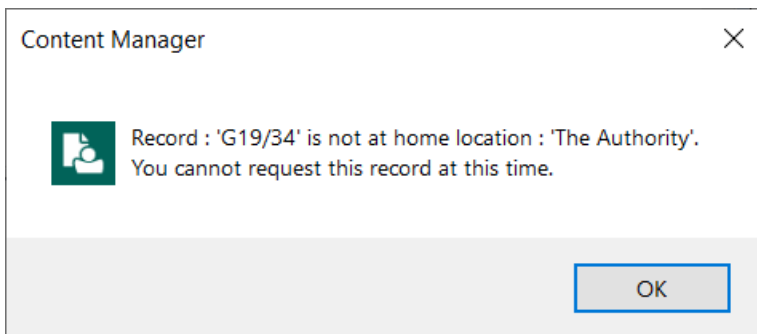


When determining the suitability of records for disposal, a Disposal Suitability log file can be generated. This option has been enhanced to include the option to include additional details for the selected records.



## Record Requests

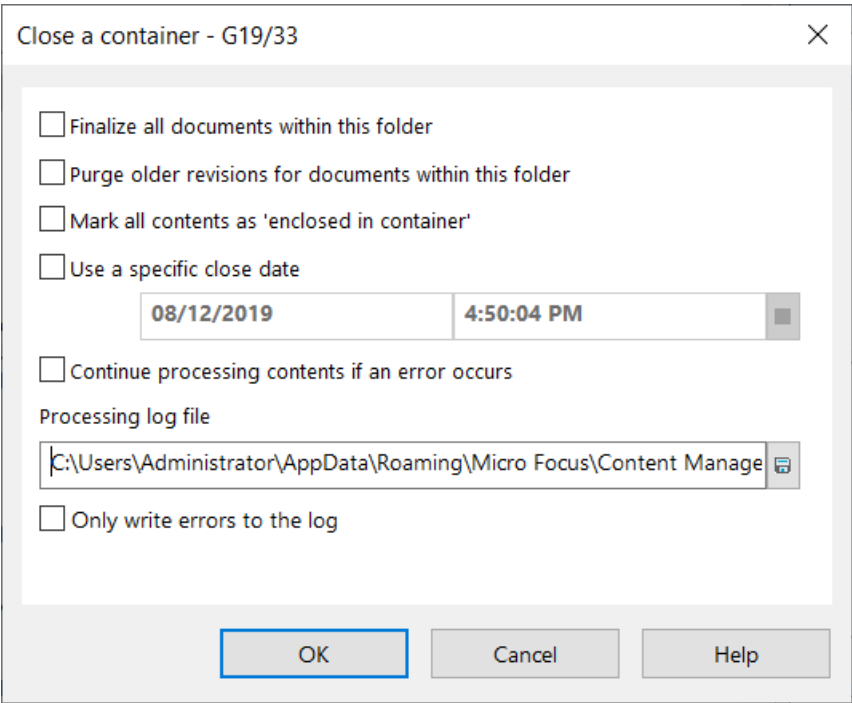
Two new options have been added to the Requests features, **Cancel Request** and **Uncomplete**. This will allow users to cancel a request for a record, or if a request has been completed the status can be reverted to a new state by using the **Uncomplete** option. Along with these new options, new request rules have been added to prevent requests if the record already requested by another user or record is not at home.

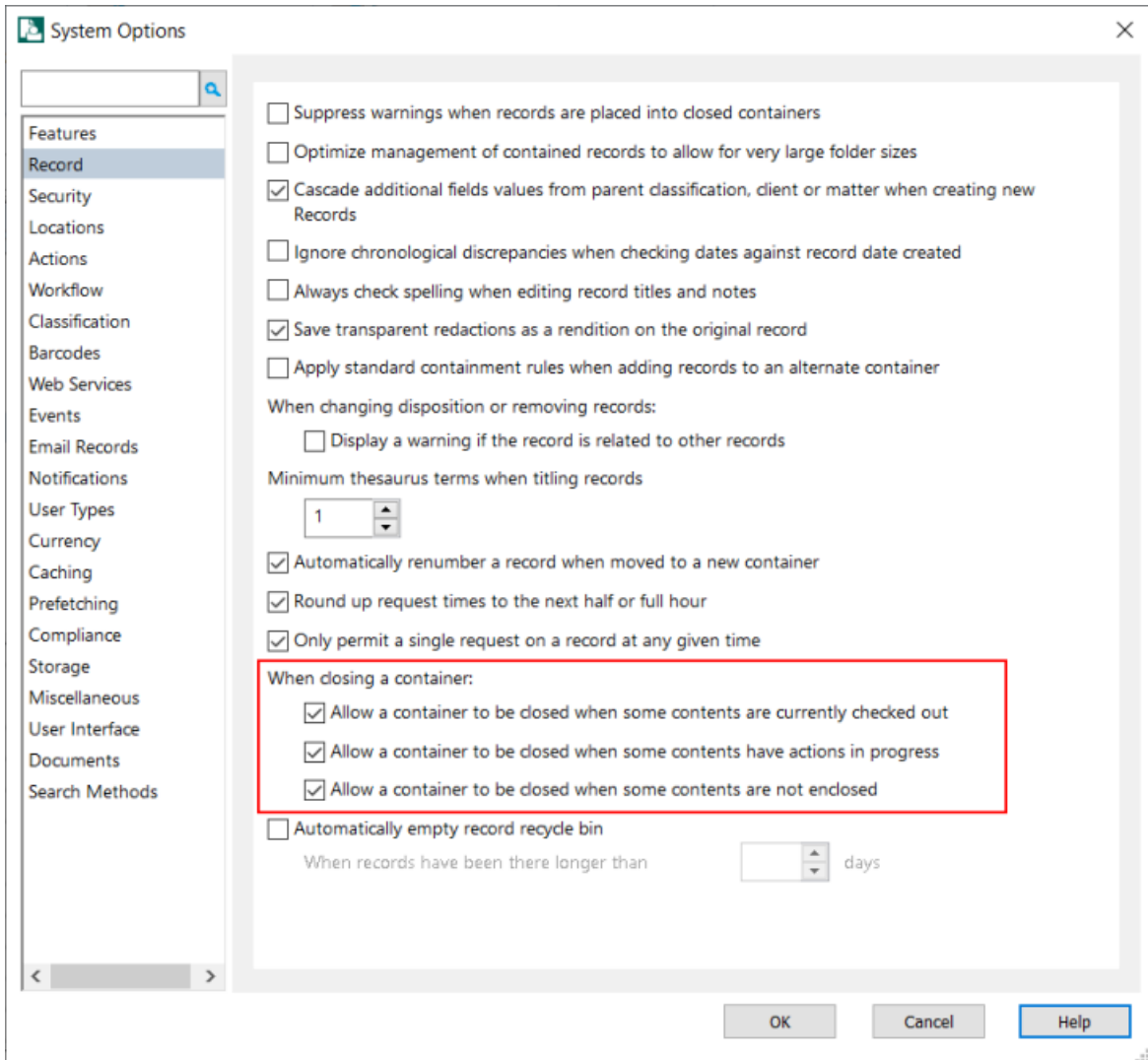


## Closing a Record

The procedure for closing records has been reviewed and enhanced in this release. Rather than setting a Date Closed via the **Details - Dates** menu, a new menu option, **Close Container**, has been added to

the record right-click **Archiving** menu. Combined with new **System Options** on the **Record** page, this new option allows organizations greater flexibility in handling the records that are contained within a closed container.



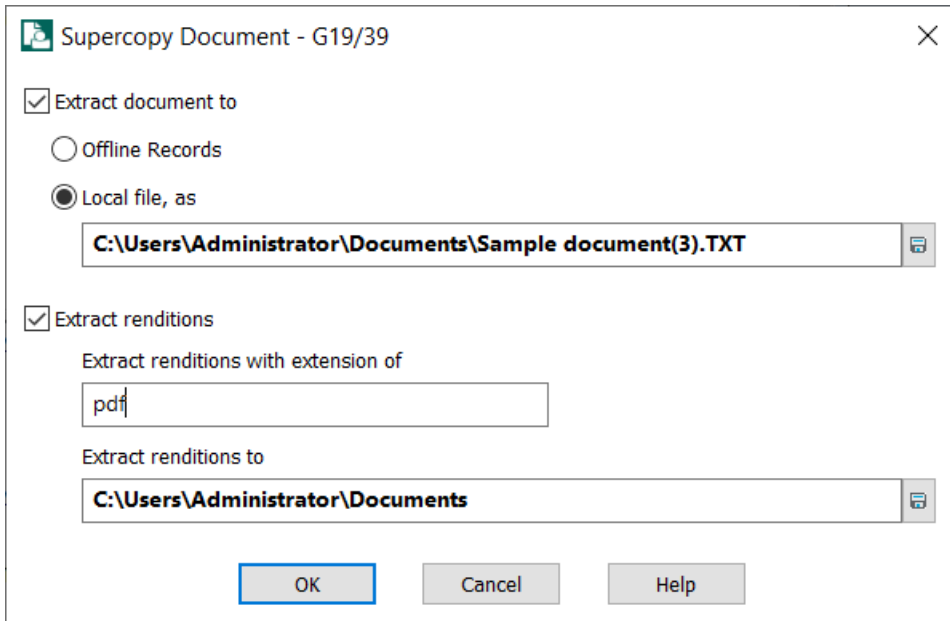


To "undo" the closing of a container, there is a new menu item called **Reopen**. This function also works on all the contents of the selected record, with an option of unfinalizing all the contents. It can only be done for records that don't have a container, or whose container is currently open. So, if you want to reopen a subfolder, you need to reopen its container first.

## Renditions and Revisions

A new option has been added to the **Record Type - Electronic** page that allows administrators to preserve all revisions that are associated to records that are created using this record type. This will protect the revisions from being removed as a part of the record finalize process or during any **Data Cleanup** processes.

When creating a Supercopy of a record that has renditions attached, users can now choose to extract a rendition as the Supercopy.



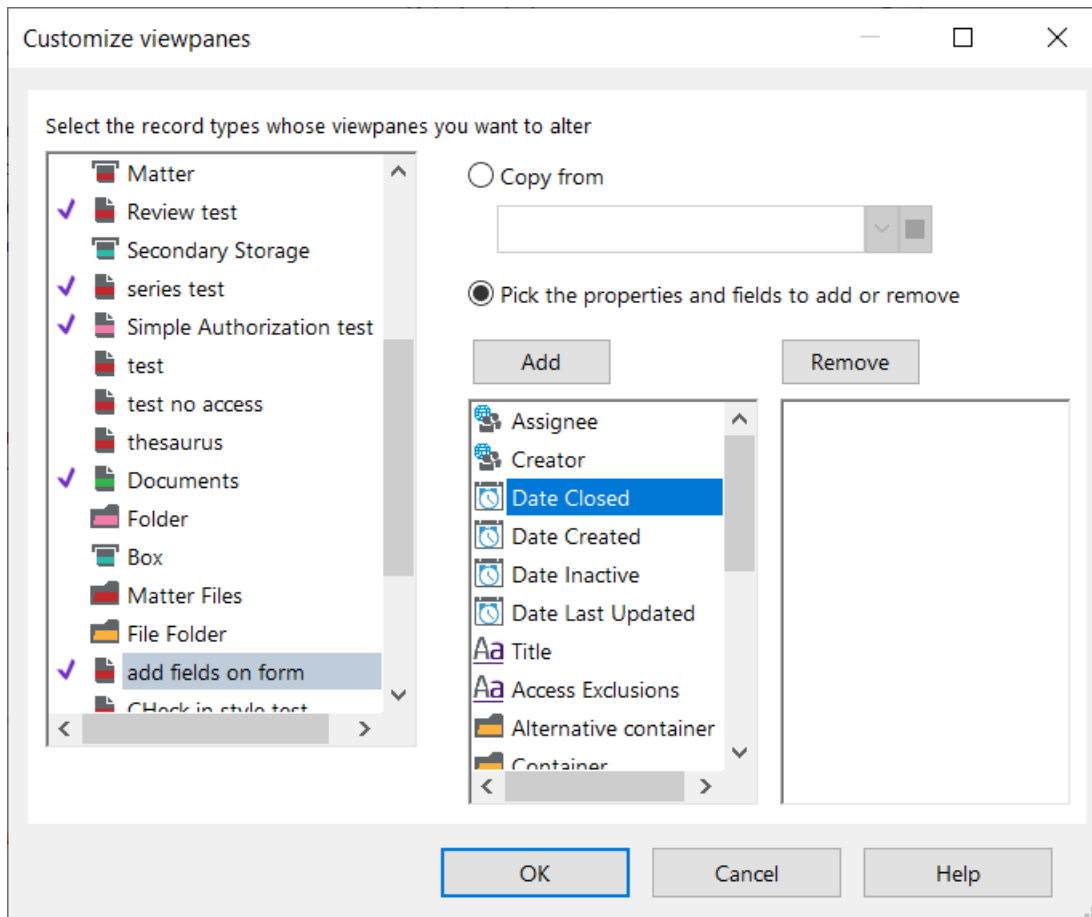
When a new TIFF or PDF rendition is requested, either by the record right-click **Electronic - Request Rendition** menu in the Content Manager client, or via the automatic PDF rendering options in Content Manager Enterprise Studio, it is now possible to add the generated rendition as the latest revision of the document.

For records that have revisions and/or renditions, these can now be easily accessed using the new record right-click **Electronic** menu options - **Revisions** and **Renditions**. Selecting these options will open the items in a new dialog, with the same options available that are available when viewing these options via the record's properties tabs.

A new search method allows for users to search for records that have a specific number of revisions. The **Revision Number (revision:)** search method will retrieve all records that have an equal number of revisions being searched for.

## Update View Pane settings for Multiple Record Types

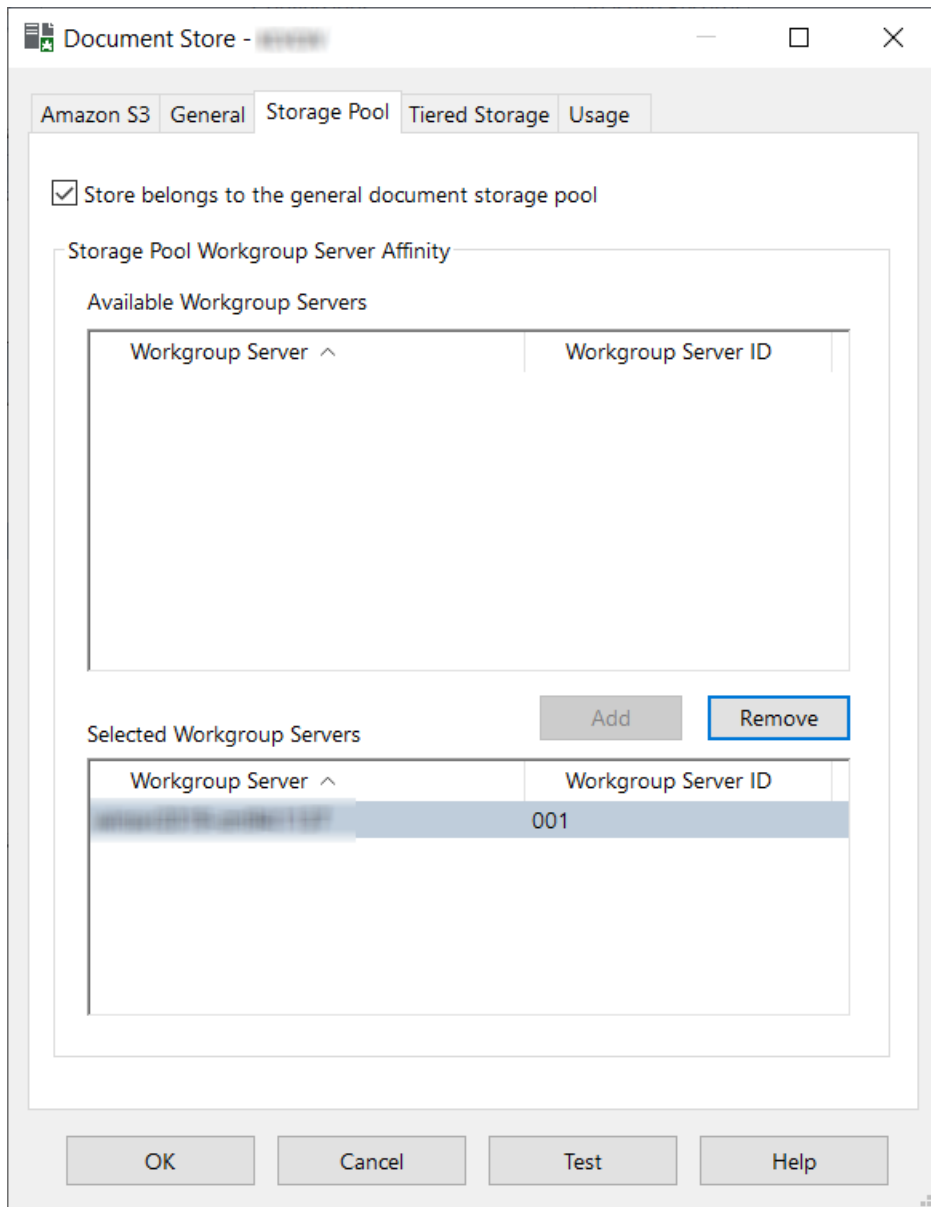
A new menu **Customize Multiple** is now available when right-clicking in the view pane, which allows users to update their record view pane settings for multiple record types. On the **Customize viewpanes** dialog, users can select the record types whose view pane they'd like to update, then either copy from an existing record type setup or build their own view pane settings by selecting the required properties to add or remove.



## Document Stores

A new option **Storage Pool Workgroup Server Affinity** is now available for a Workgroup Server to select a document store from the document storage pool. The Workgroup Server will preferentially select document stores that it has affinity with. On the document store properties, on the **Storage Pool** tab, a document store can be added to have an affinity with selected workgroup servers.

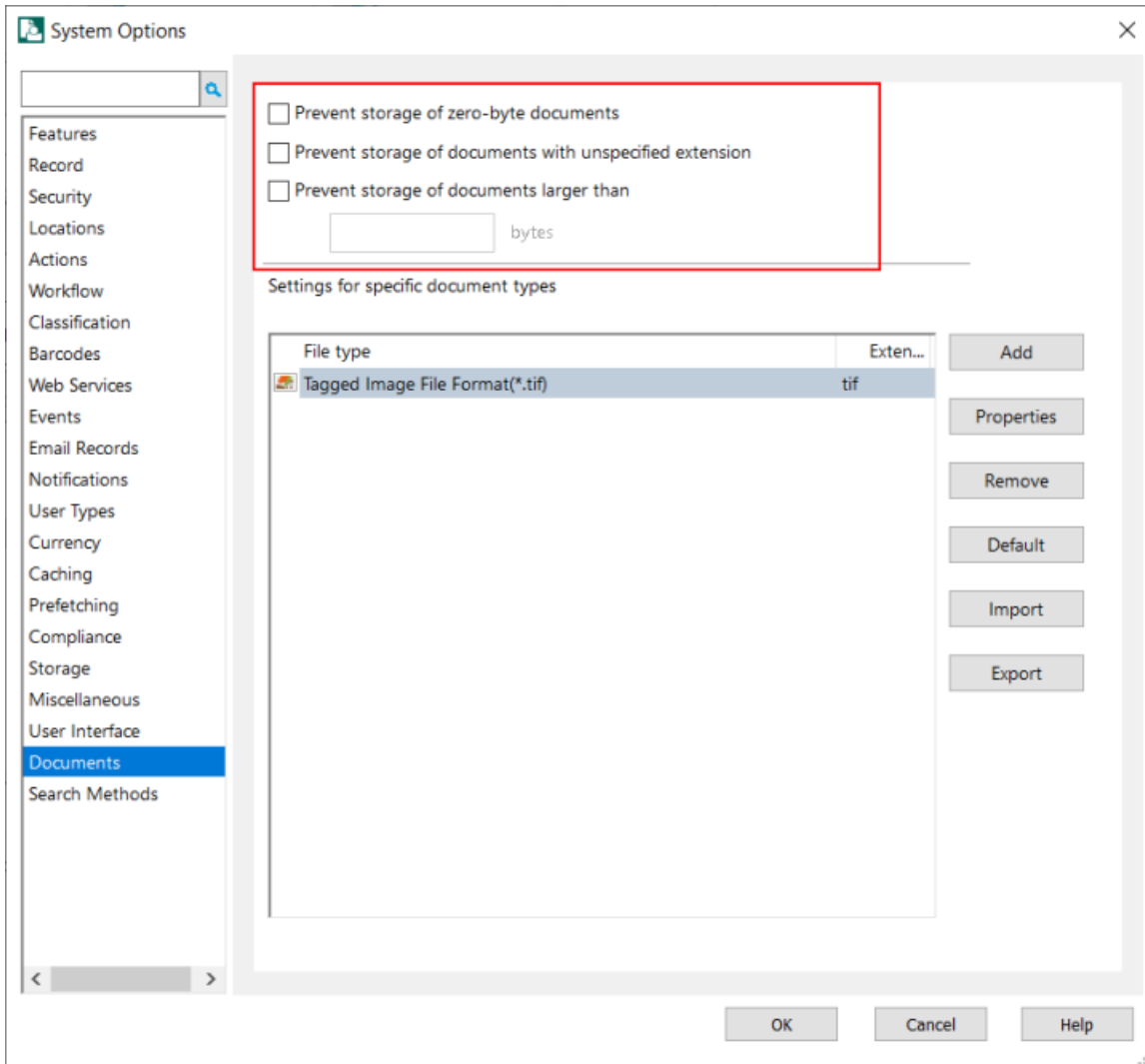




This feature allows reduction of network traffic by directing storage requests to document stores that are located in proximity to the Workgroup Server.

There are also new **System Options** on the **Documents** page which allows organizations to prevent the storage of documents which are:

- zero bytes in size
- do not have a specified extension
- are larger than a specified size



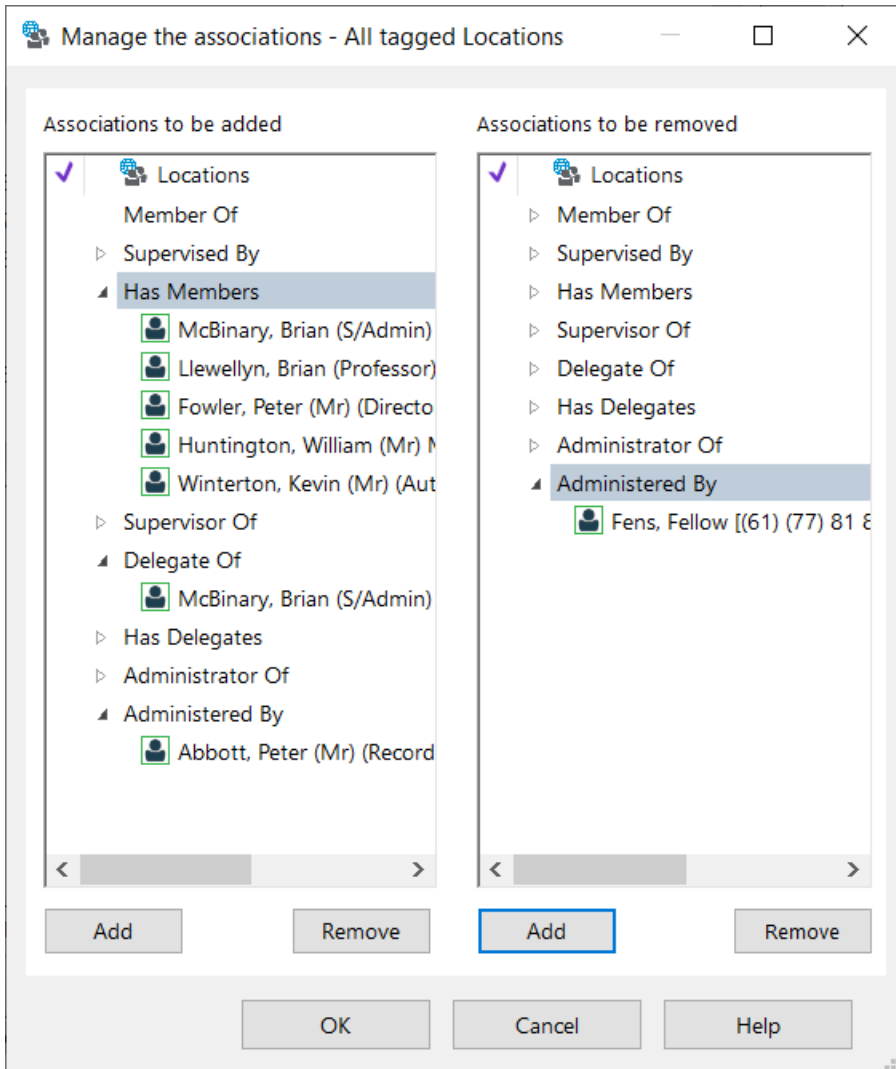
## Location improvements

A new System Option on the **Locations** page allows organizations to set a default setting for the **Keep a history of address changes** option for changes to location addresses. Organizations can now choose from 3 options:

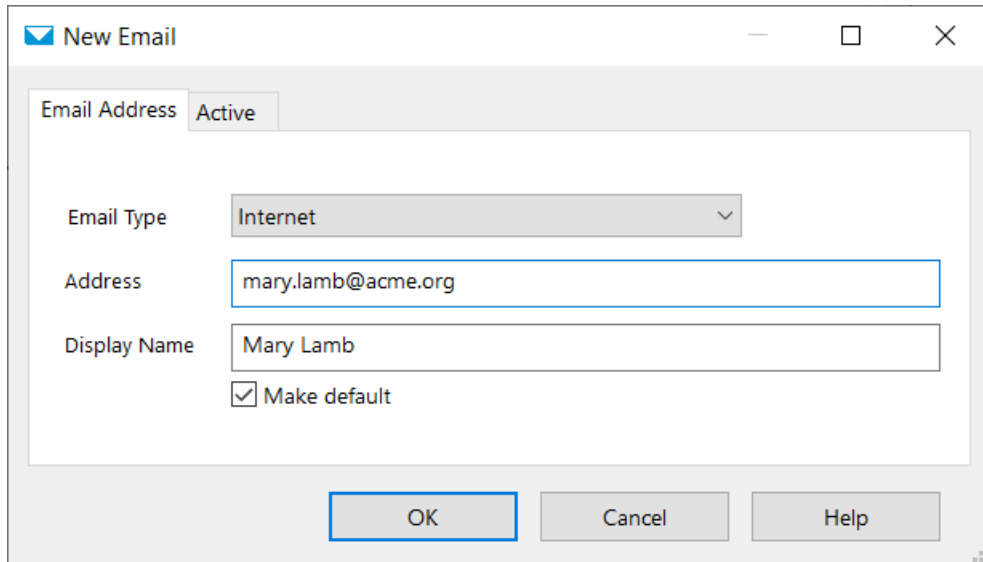
- Keep address history if enabled for a location
- Keep address history for most locations
- Always keep address history

When removing locations additional merge options are now available. Organizations can now copy across the existing addresses and user labels from the location being removed to its replacement location.

A new option, **Manage Associations** allows updating location associations, either on a single location or on a selection of locations without having to open the location's properties dialog.



When adding a new email address to a location via the location properties **Electronic Addresses** tab, the option to make the new email address the default email address is now available.



End users can now update their own personal information in the location list, even if they do not have modify location permissions. From the **File - Profile** option, or by double clicking their user name in the status bar, users will be able to edit details such as their name, email address, phone numbers, addresses, image and add notes to their profile. To allow users to update their own information, they will require the new user permission **Modify your own user information**.

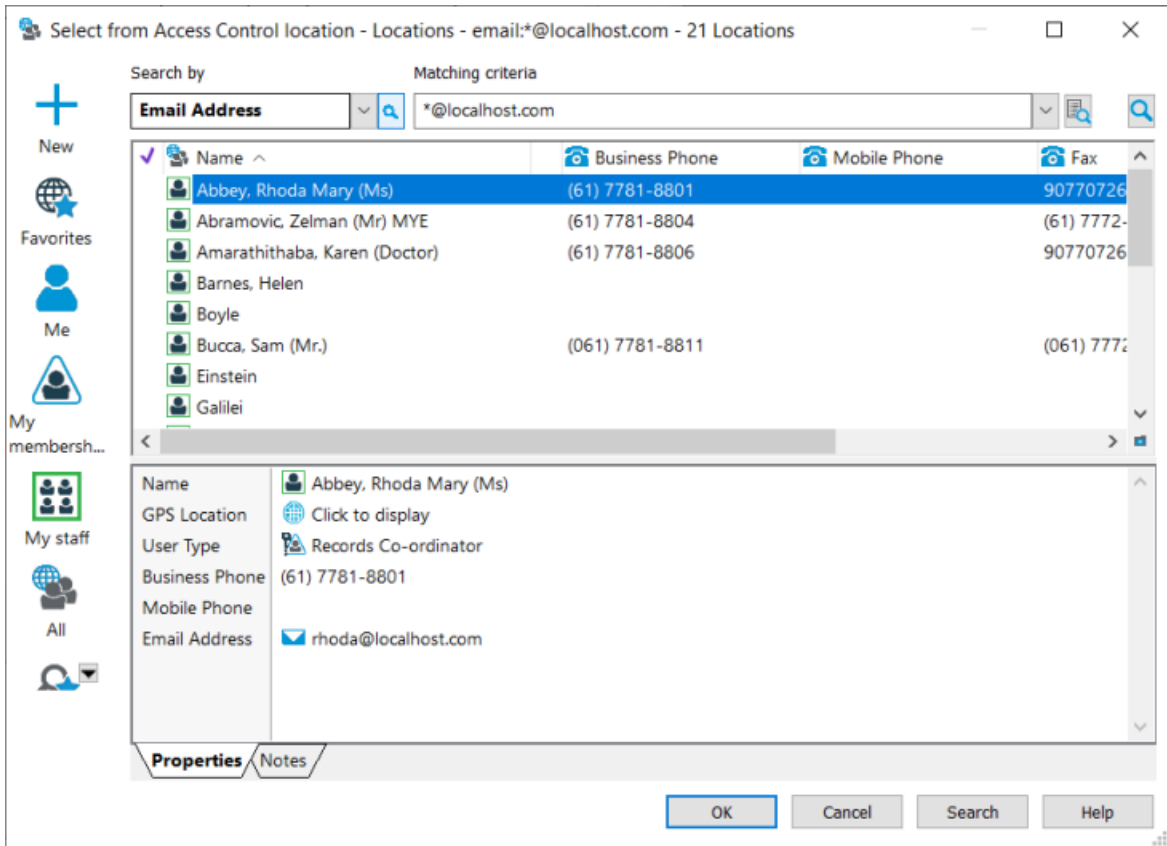
Several changes have been made to user permissions:

- The "Create, modify or delete census activities" permission has been separated from the Record Administration permission. A new permission **Census administrator** has been added .
- The "Change Record Type" into a separate permission from the Record Administration permission. A new permission **Modify record type** has been added.
- A new permission **Modify record classification** has been added.
- A new permission **Record archivist administrator** has been added.
- Two new permissions for Requests have been added:
  - **Make Recurring requests**
  - **Make permanent retrieval requests**

## UI Improvements

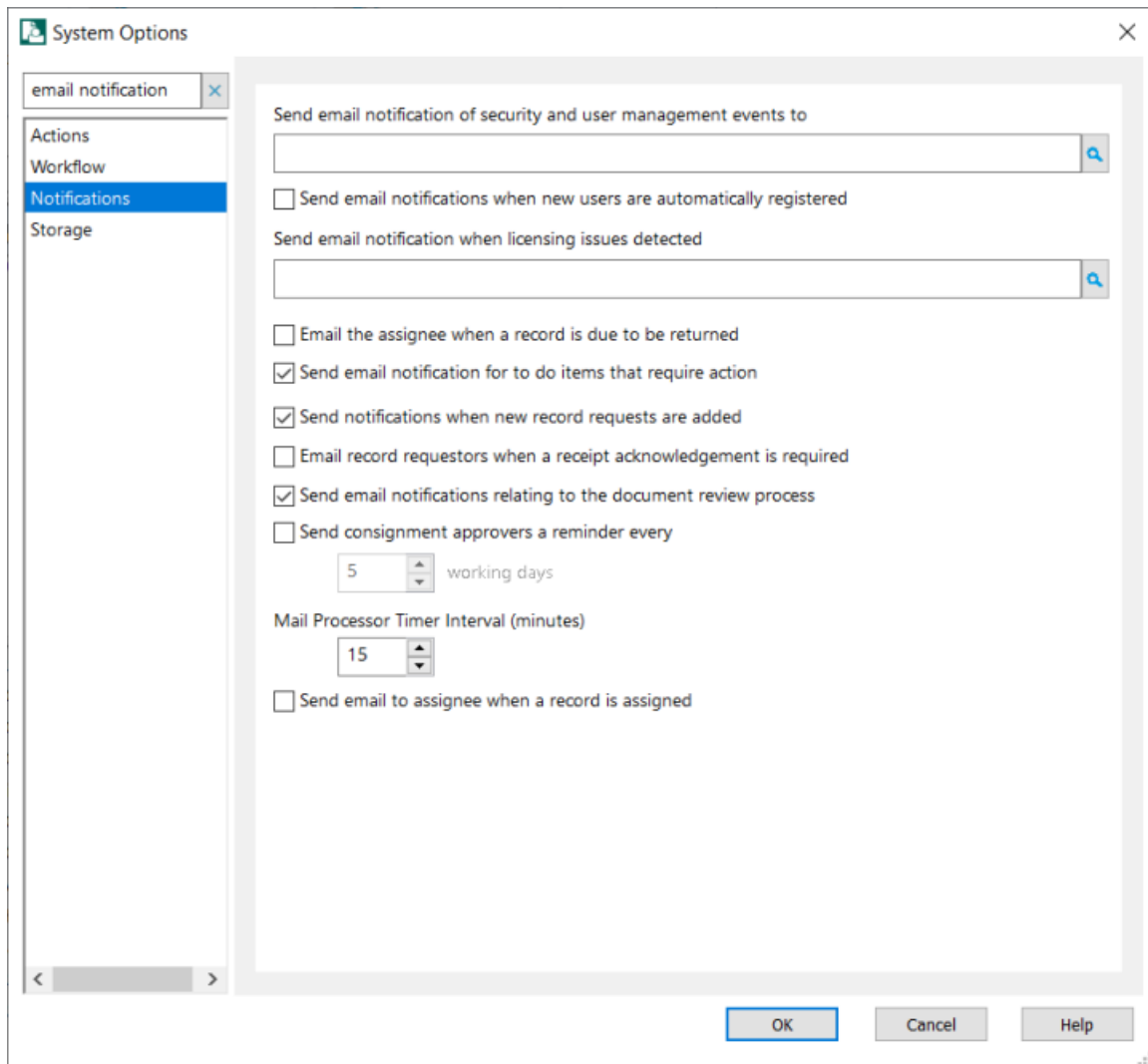
### Search option on dialogs

The quick search option has been included on the Select dialogs in Content Manager. This allows users to build a simple search from a dialog to refine the displayed results allowing them to easily find the new value for the field(s) being updated.



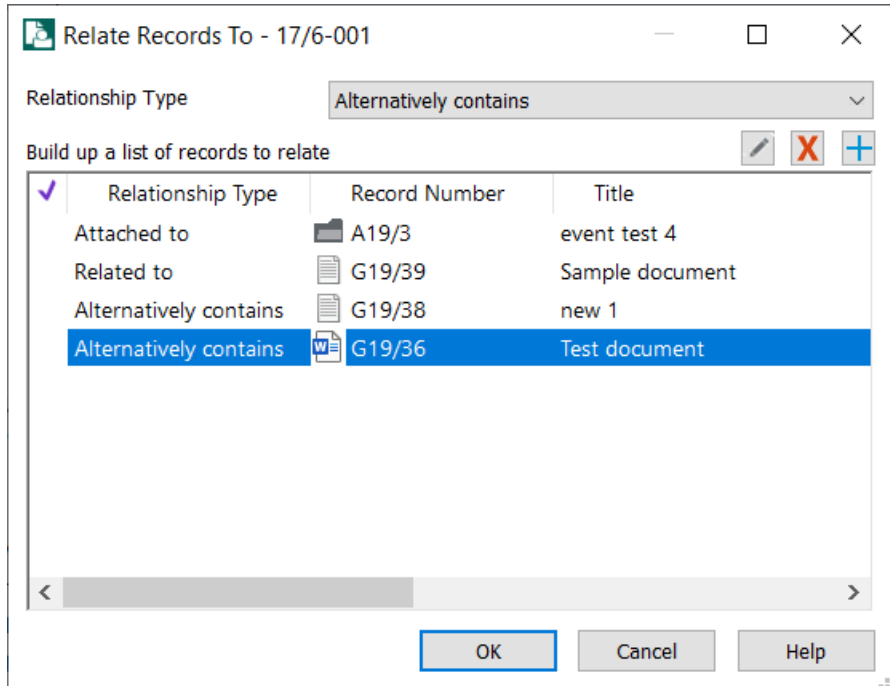
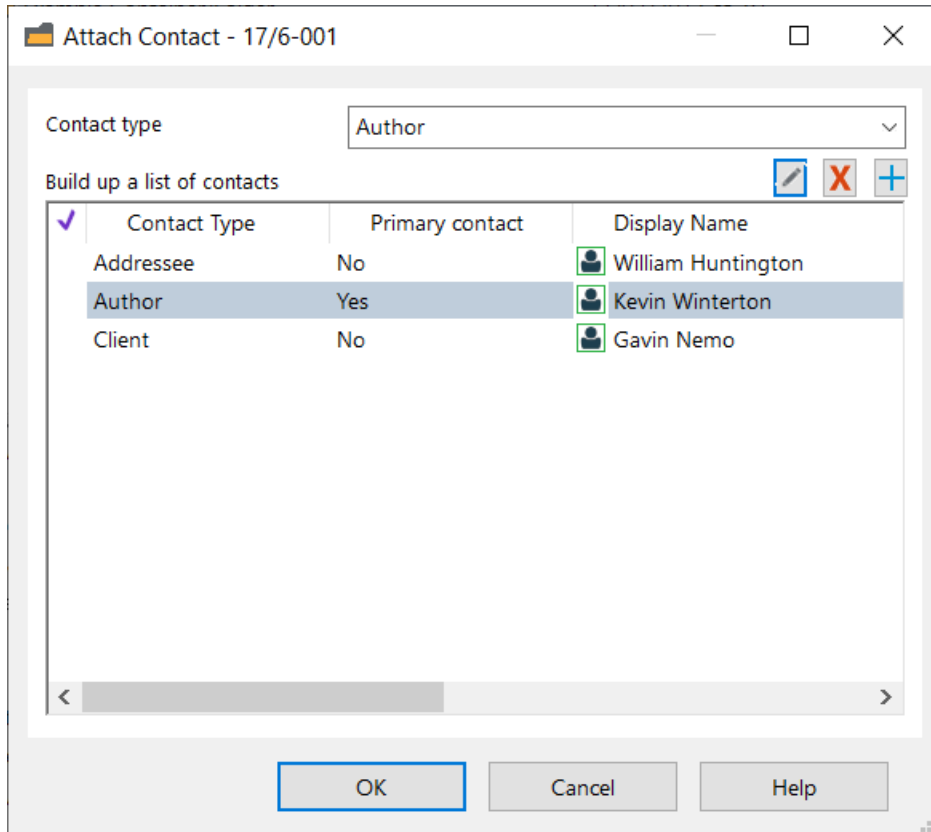
**Redesign of System Options, User Option and Record Type dialogs**

In 9.4, the System Options, User Options and Record Type dialogs have been redesigned to include a navigational panel, over the traditional tabbed dialog. We've also included a search option which allows users to search for a word or phrase that appears in an option caption, based on this search, the navigational panel will display the pages that have a match to the search term(s).



### Redesign of Record Relationships and Contacts dialog

To improve usability, the dialog used to build record relationships and to add contacts to records has been redesigned. The new dialog allows for multiple contacts to be added to records via the right-click menu, **Locations - Add Contacts**, whereas in previous releases, only single contacts could be added. For record relationships, it allows for adding multiple relationships types in a single update.



# Content Manager Web Client

## Tag and Task methods

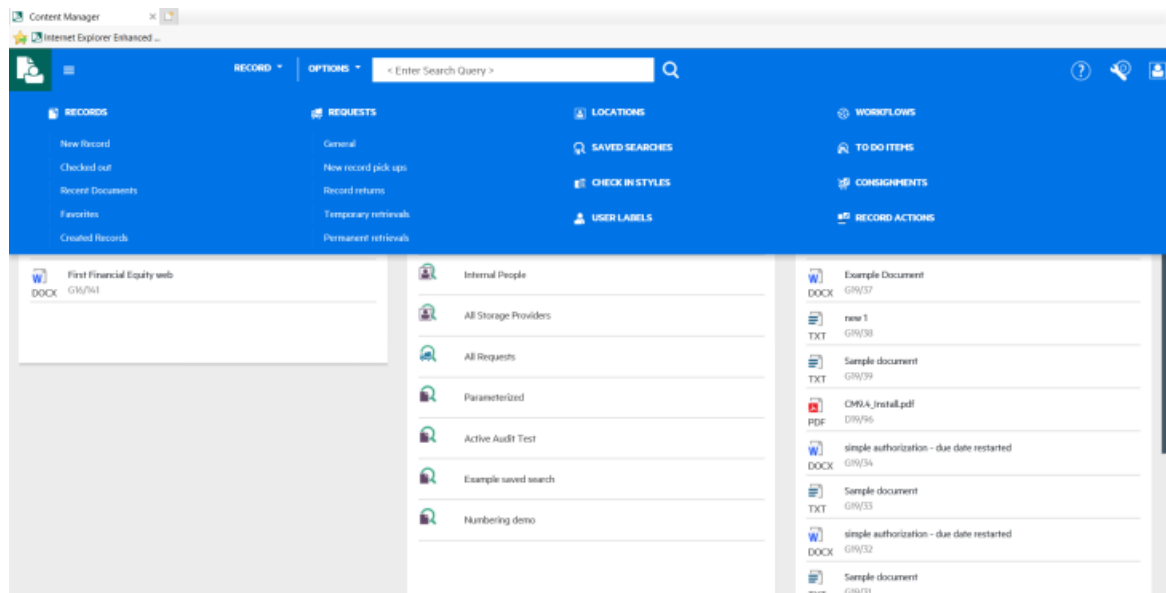
We've extended the update tasks on multiple records to include the option to update the Security/Access of a selection of records, and multiple records can now be made Final in a single update.

## Improvements to Check in Styles

To improve the user experience in the Check in Style creation process, the first requirement is now to select a Record Type, the benefit of selecting the associated record type in the first instance is that the Check in Style form will now only display the associated additional fields rather than all possible additional fields.

## UI Improvements

The Navigational panel has been moved to a masthead. This new design allows users to gain additional workspace on their Web Client page and allows for easier access to the sub-menus associated with the main objects.



## Improvements on handling large Lookup Sets

For Lookup Sets that have a large number of items the initial loading of the list has been optimized. The select dialog now has infinite scroll, as well as a Search field which enables users to search for specific look up set items.



**PLEASE SELECT A VALUE FOR 'MULTIPLE LEVEL'**

Q

Showing 1 - 2 of 2

- Level 1
- Level 1 - Level 1a
- Level 1 - Level 1a - Level 1a sub a
- Level 1 - Level 1b
- Level 1 - Level 1b - Level 1b sub a
- Level 2
- Level 2 - Level 2 sub a
- Level 2 - Level 2 sub b

OK CANCEL

## Form Search enhancements

The ability to filter searches when using the Form Search option has been included in the Web Client. Form searches for records also include the option to filter by record type.

Users can now also run recursive searches using a Form Search in the Web Client.

### FORM SEARCH

FORM SEARCH
FILTER
RECORD TYPE

---

TEXT ▼

Any Word

LOCATION ▼

Creator  Recursive

Administration +

Assignee  Recursive

SEARCH
CANCEL

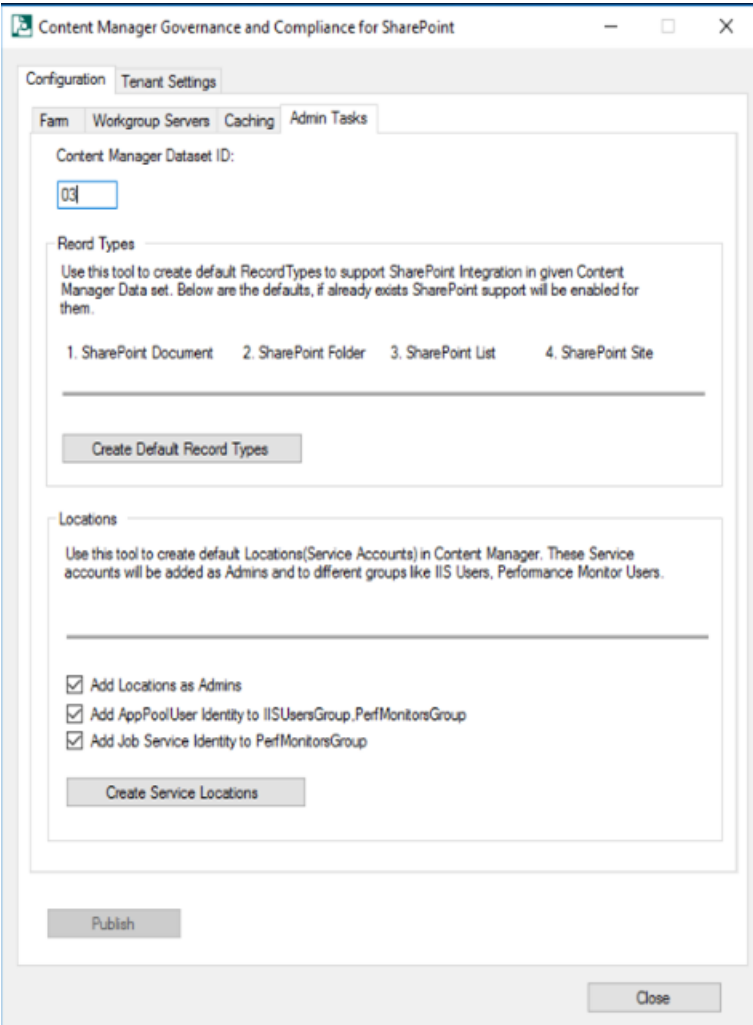
## Content Manager SharePoint Governance and Compliance

### Improvements to installation and configuration

To reduce manual configuration effort, the following manual steps are now automated as a part of the **Configuration Wizard** setup process:

1. Creating the default Location
2. Creating the default Record Types:
  - a. SharePoint List
  - b. SharePoint Site

These settings can also be accessed and the required SharePoint components created in Content Manager using the **Configuration Tool**, on the **Configuration** tab - **Admin Tasks** tab.



## Upgrade Considerations

As a result of changes to functionality, when upgrading to Content Manager 9.4, if the following features are being utilized by your organization, please ensure that you are aware of the following:

### **Spell Check - Advanced Configuration**

The Spell Check Advanced Configuration settings will be lost on upgrade and will need to be re-applied.

### **Document Review and Authorization**

If you are using the Document Review and Authorization feature, ensure that all Document Review and/or Authorization processes are completed before upgrade. If they are in progress during the upgrade the process will need to be restarted.

### **Elasticsearch**

If you're using the Elasticsearch option for your Content Indexes, you will need to re-index after upgrade.

### **Office Integration**

Due to changes to the staging path, it is highly recommended that all checked out documents be checked into Content Manager before upgrading. See [Microsoft Office Integration, on page 25](#) for details.

## Enhancement Requests included in this Release

CR Number	Customer Symptom and Resolution
233573	<p><b>When attaching notes, either Related Record Action Notes or Parent Record Action Notes, nothing displays in the Action Made Current Email Template.</b></p> <p>Enhanced. The Notes in the Action Definition are the notes that are copied to the Instructions property of the Record Action.</p>
234090	<p><b>For User-defined fields, an override is required for the system option to force spell checking of the value.</b></p> <p>Enhanced. User defined fields of type text or string now have their own setting as to whether to force spell checking. This overrides the general system option setting.</p>
234262	<p><b>Refine a search so that it only returned the current or latest version of documents within a container.</b></p> <p>Enhanced. There is a new result post processing option on the Search Options tab when doing a search for records. This gives access to the options for post processing</p> <ul style="list-style-type: none"> <li>- show the latest part of each record found (if the record is the latest part or has no parts then it returns itself),</li> <li>- show the latest version of each record found (if the record is the latest version or has no version then it returns itself),</li> </ul> <p>This option is also saved when you save a search.</p>
234276	<p><b>To add "Alternatively Contained" record relationships to copy feature, since both are common uses of relationships.</b></p> <p>Enhanced. You can now copy Alternate Containers when copying a record. A checkbox added to the copy record dialog to allow this.</p>
234287	<p><b>On the document level, the document should retain the security from the folder and when you use "custom", it should have the folder security listed so that you can add to that.</b></p> <p>Enhanced. New button added to the Custom Access Page that now enables users to copy the ACL from the container to the current record.</p>
234330	<p><b>Ability to select a sort method for listed records under Classifications.</b></p> <p>Enhanced. In the Search Result tab, there are four new default sort settings. These settings are used when expanding a node in the tree box to show one of the possible record sets:</p> <ul style="list-style-type: none"> <li>• when displaying records within a classification</li> <li>• when displaying records within a container</li> </ul>

	<ul style="list-style-type: none"> <li>• when displaying matter records for a client record</li> <li>• when displaying records associated with a master record</li> </ul>
235019	<p><b>When an item with a document attachment is managed, it is not possible to view the attachment through the RM desktop or web client.</b></p> <p>Enhanced. If multiple attachments exists then those attachments will be zipped and stored in CM.</p> <p>When the item is managed then only metadata will be captured in CM. For custom list, only item metadata will be stored in CM and attachments will not captured. If that item is having multiple documents and the document is relocated then documents will be captured as zip file. If item is having a single document then it will be shown as single document attachment.</p>
235932	<p><b>No email notifications received for requested records located in Space Management.</b></p> <p>Enhanced. A new property "administrator" has been added for a Space. This allows you to define a contact location that will be used to notify anything relevant that is happening in that particular space. An additional property "Administered By" has been added.</p>
236252	<p><b>Enhancement request for the ability to edit documents when using Document Review/Authorization feature.</b></p> <p>Enhanced. There is a new setting in the document review property sheet that says "allow reviewers to edit documents". This extends the editing permission from the editor, to the editor and all reviewers.</p>
237525	<p><b>Outlook Integration Check-in Styles should include these additional options; "Alternative Container", "Author" and "Addressee".</b></p> <p>Enhanced. Document Queues and Check-in Styles now support a default for the author, addressee and alternative container. The default applies to both email and normal documents.</p>
237542	<p><b>Closing a file using 'Date Closed' leaves contents open for editing. Add an option to change this behavior.</b></p> <p>Enhanced. Instead of specifying a date on the Details - Dates dialog, you now close a record by selecting the Close Container option underneath the Archiving menu item.</p>
238796	<p><b>Enhancement request to have greater accessibility to Action Instructions.</b></p> <p>Enhanced. Actions Instructions are now visible in the view pane of record action page and a new record property that shows the instructions of all incomplete actions has also been added.</p>
239471	<p><b>Datasets log files gets split between 2 directories. This should be produced in the same directory.</b></p> <p>Enhanced. Enterprise Studio - Datasets log file is now produced in the same directory.</p>
239729	<p><b>The current record request functionality will set the date required field to the</b></p>

	<p><b>closest half-an-hour in the future. You cannot change the date required time to now.</b></p> <p>Enhanced. Record request date required is now only rounded up when the new System Option on the Record tab 'Round record request to the next half or full hour' is selected.</p>
239847	<p><b>Print Report and Print Merge from the list of consignment records that are being approved/rejected. This improvement will allow the rejection comments to be included in reports.</b></p> <p>Enhanced. A new sub band is now available on the consignment report. It is the consignment record rejection band. This band includes the rejection reason field.</p> <p>All the other rejection fields are also available.</p>
240642	<p><b>Allow Caption changes in the Office Integration.</b></p> <p>Enhanced. The Caption editor now contains the entry 'Generic Items \ Enumerated List \ Office IntegrationMenu Caption'. This contains a list of most Ribbon buttons which can be used to customize captions.</p>
240739	<p><b>Add functionality that allows users to 'print merge' results obtained from a "Records Action" searches.</b></p> <p>Enhanced. Print Merge, Print Report, and Web Publish tasks are now available for Record Actions.</p>
241641	<p><b>Enhance the Workflow activity rollbacks are displayed. Currently when there is a rollback to a previous activity due to multiple results, the results are not shown in the Notes field, only that a rollback occurred. So the reason for the rollback cannot be tracked.</b></p> <p>Enhanced. When an activity rolls back, the result will be added to the notes field along with the rest of the information.</p>
241950	<p><b>Logging of View activity on the web client displays as "Document Extracted" instead of "Document Viewed".</b></p> <p>Enhanced. Logging of View activity on the web client now displays as "Document Viewed".</p>
242133	<p><b>Have the ability to create an email template for Record Assigned.</b></p> <p>Enhanced. A new system option on the Notifications tab to enable email to record assignees is now available.</p> <p>A Mail template for this notification type has also been created.</p>
242191	<p><b>Enhancement request to distribute electronic records and revisions based on the users currently logged in workgroup server.</b></p> <p>Enhanced. Electronic records and revisions can now be stored based on the users currently logged in Workgroup server.</p>
242395	<p><b>WGS should respond to HTTPS health check.</b></p>

	Enhanced. A valid response (HTTP 200) is returned to indicate that the workgroup server is up and running.
242487	<p><b>An Administrator does not have the option to set the Office Integration Default Record Type for all users.</b></p> <p>Enhanced. The default Record Type and 'Use default record type' options are now connected to the CM user options.</p> <p>Go to: User Options &gt; Documents then set:</p> <ul style="list-style-type: none"> <li>- Default RecordType</li> <li>- Use the default record type in integrated authoring applications.</li> </ul> <p>When these are implemented, the changes will be reflected in the Office integration.</p>
242513	<p><b>Large result sets need protection from network dropouts.</b></p> <p>Enhanced. For content searching (IDOL) - large result sets are now protected from network dropouts.</p>
242660	<p><b>When creating a record with an electronic document attached via the Office integration it can sometimes fail and does not produce an error.</b></p> <p>Enhanced. A meaningful error is now displayed if the Office integration record creation process fails.</p>
242692	<p><b>Show container record number when creating new Checking style in Outlook 2016.</b></p> <p>Enhanced. Now shows container number instead of title.</p>
242774	<p><b>Support Azure SQL Server managed instances.</b></p> <p>Enhanced. Content manager now works with SQL Azure managed instances.</p>
242869	<p><b>Improve GPS Location details and have GPS Location display appropriately in the View Pane.</b></p> <p>Enhanced. If the GPS Location details is a LineString or Polygon type, the Area and/or Perimeter of the location is displayed. These are also displayed in the GPS Location field in the View pane.</p>
242892	<p><b>Allow auto check-in for document edited for Web Client.</b></p> <p>Enhanced. Content Manager has an Office Add on that supports opening from and saving to CM. This add on detects if a file has been opened from the Web Client using WebDav and will allow the end user to check it back in.</p>
242957	<p><b>When the user has the permission "Make request" they will be able to create multiple types of request, the customer would like a "switch" to turn on-off for each request so the user can use the ones that he has on despite if the user has that permission assigned.</b></p> <p>Enhanced. Added a new Make Recurring Requests permission. If you don't want a user to make a recurrent request you can not give them this permission (see System options -</p>



	Permissions to turn this permission off at the system level).
242970	<p><b>Copy records function has been enhanced to allow copy of all relationship types.</b></p> <p>Enhanced. The Copy record now allows users to copy alternate container relationships as well.</p> <p>No other relationships were added to the 'Copy Record' dialog as they did not make sense to copy.</p>
243061	<p><b>On a User Label, add 'Show Classifications' to the menu options.</b></p> <p>Enhanced. There is now a new menu item on the context menu for Label objects - Show Classifications.</p>
243112	<p>Documents that are manually deleted from a user's offline folder are not recoverable from the Windows recycle bin.</p> <p>Enhanced. When you delete a draft document from Offline Records it is moved to the recycle bin.</p>
243254	<p><b>Leave behind a .tr5 reference file when importing records from a network drive or local machine.</b></p> <p>Enhanced. Two new options are now available:</p> <ul style="list-style-type: none"> <li>- delete file on import</li> <li>- create .tr5 file to replace imported file</li> </ul>
243274	<p><b>Option to allow Additional fields to be used with Requests.</b></p> <p>Enhanced. Now, the "record - new request" function displays the additional field values page. New tab "Additional" has been introduced for creating and modifying Requests.</p>
243295	<p><b>Provide a way to limit the size of the individual documents being uploaded into TRIM.</b></p> <p>Enhanced. The System Options "File Types" tab has been renamed "Documents".</p> <p>There are three extra settings:</p> <ul style="list-style-type: none"> <li>Prevent 0-byte documents (this option got moved from the Storage tab)</li> <li>Prevent documents without a valid extension</li> <li>Prevent documents that are larger than a specified number of bytes. (see related CR)</li> </ul> <p>These settings are checked whenever you drop a file into Content Manager or your check in/attach a document to an existing record.</p>
243313	<p><b>Provide encryption capabilities for Amazon S3 stores.</b></p> <p>Enhanced. Encryption option for Amazon S3 (including ECS) and Azure is now present.</p>
243327	<p><b>Add to Favorites option should be greyed out for the record that is already in Favorites Tray.</b></p> <p>Enhanced. Add to Favorites / Remove from Favorites are now disabled/enabled as</p>

	<p>appropriate.</p> <p>This has also been implemented for the records worktray, recent documents and recent containers.</p>
243606	<p><b>Add Show Retention Schedules option on User Label right-click menu for showing all schedules attached to the user label.</b></p> <p>Enhanced. Added a Show Retention Schedules menu item to the Context Menu for User Labels.</p>
244234	<p><b>Unable to export or import additional field data with DataPort.</b></p> <p>Enhanced. The object types Classification, Schedule and Todo Item now allow Properties and fields to be selected.</p>
244377	<p><b>Provide a way to configure the Render polling frequency.</b></p> <p>Enhanced. Added two new options:</p> <ul style="list-style-type: none"> <li>- TRIM Enterprise Studio &gt; Dataset &gt; Event Processing &gt; Rendering</li> <li>-On the General tab:</li> <li>- Polling interval for checking for new user rendering requests (seconds)</li> <li>- Maximum Render Job Queue Length</li> </ul>
244386	<p><b>Allow email notifications to be sent to all members of any location type.</b></p> <p>Enhanced. The option to send an email notification to all members has been expanded to include all location types that can have members.</p> <p>The list is an organization, group, workgroup, position, committee, and project team.</p>
244507	<p><b>Option to choose “User labels” in the Start Up Options in Content Manager (9.3 onwards).</b></p> <p>Enhanced. Added new startup option of User Labels.</p>
244588	<p><b>Import foreign barcode for space management.</b></p> <p>Enhanced. DataPort now supports importing Spaces only for the purpose of updating existing spaces, import of new Spaces is not supported.</p>
245016	<p><b>Allow file scanning to be done before uploading to the Workgroup server or Document Store.</b></p> <p>Enhanced. Introduced a new config attribute. It is currently off by default. By setting this value, it will delay the WebClient record creation process. When the user uploads the file to the server, a progress message is displayed that the file is being scanned. When this time is over, the web client will send a message to the server to check if the file is still there under the upload staging folder.</p>
245137	<p><b>Ability to Navigate to All Parts of a Record for the CM Web Client.</b></p> <p>Enhanced. The option to navigate to All parts of a record is available on the CM Web Client.</p>

255001	<p><b>Allow users to associate an icon with an external link.</b></p> <p>Enhanced. Users are allowed to associate one of their icons with an external link.</p>
255023	<p><b>SharePoint Online URL field is not long enough for max. SP URL length of 400 characters.</b></p> <p>Enhanced. SharePoint URL is now up to 512 characters. Also adjusted the maximum length for the corresponding record property.</p>
256044	<p><b>Office Integration does not have search capabilities</b></p> <p>Enhanced: A search panel is now present in the Office integration.</p>
258091	<p><b>Hidden cells in Excel spreadsheets are not indexed.</b></p> <p>Enhanced. An option now exists in Enterprise Studio to enable indexing of hidden cells in Excel spreadsheets.</p> <p>For IDOL search engine option is provided under content tab of Enterprise studio-&gt; Dataset -&gt; Content Index.</p> <p>For Elastic search engine option is provided under general tab of Enterprise studio -&gt;Dataset -&gt; Content Index.</p>
258092	<p><b>Content of text that was deleted from a document with revision tracking not indexed by search engine.</b></p> <p>Enhanced. An option now exists in Enterprise Studio to enable indexing of deleted text when using revision tracking.</p> <p>For IDOL search engine option is provided under content tab of Enterprise studio-&gt; Dataset -&gt; Content Index.</p> <p>For Elastic search engine option is provided under general tab of Enterprise studio -&gt;Dataset -&gt; Content Index.</p>
262011	<p><b>Provide an option for turning on/off Predictive Text for Titling Records in CM Client.</b></p> <p>Enhanced. A new user option has been added see User Options &gt; User Interface &gt; Enable predictive mode on title field.</p>
262032	<p><b>To be able to set access control exclusions on a record.</b></p> <p>Enhanced. There is a new property for a record called "Access Exclusions". This is available for display on the record view pane and can be exported in a bunch of ways.</p>