



Brochure

Bring Information to Life and Use It

Manage information across the lifecycle with Content Manager.

opentext™

Information Is the New Currency of Business

Many organizations recognize that corporate information is the new currency for gaining a sustained competitive advantage and market leadership. Successfully delivering on business objectives in today's dynamic and global environment requires you to unlock the value of information by making it accessible to staff and stakeholders across the enterprise. The ability to accomplish this has become increasingly difficult, as growing volumes of content and diverse formats make the information landscape more difficult to navigate and understand. There is also added pressure to manage information in line with growing regulatory requirements.

Addressing these challenges, OpenText™ Content Manager a governance-based enterprise content management (ECM) system provides complete information lifecycle management for enterprises across the globe. Built on more than 30 years of information management expertise, Content Manager is a comprehensive, out-of-the-box software solution that enables you to effectively manage and collaborate on documents and records, email, Web content, images, video, and workflows to achieve business objectives.

Bring Your Information to Life and Unlock Its Full Value

Many organizations look to information governance (IG) as the key to unlocking value from their numerous information repositories. This value, however, changes throughout the information lifecycle and needs to be considered in your strategy. As a cornerstone of the OpenText™ Information Governance portfolio, Content Manager is a proven, flexible, and scalable enterprise content management foundation to build your information governance solution.

Content Manager facilitates authorized access, collaboration, and management of enterprise content in the context of business processes and transactions. It helps you improve and streamline content workflow so you can remain compliant with organizational and regulatory mandates even with growing resource constraints. The ability to leverage accurate, contextual, and complete information throughout its lifecycle yields significant value when delivering services to your customers, making business decisions or setting strategy for the future.

Content Manager is all about bringing your information to life and managing it as efficiently and completely as possible from creation to disposal, beyond the lifespan of your projects, staff, and business applications.

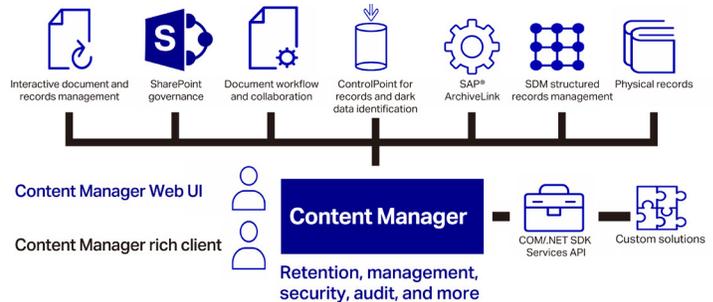


Figure 1. Content Manager use cases

Simplify Information Capture, Classification, and Management

Content Manager offers greater levels of configurability, along with desktop, workflow, and integration tools to help you perform diverse business processes and meet your information governance needs. These capabilities range from the capture of records from structured business processes such as customer relationship management (CRM), order processing, and HR functions, to highly scrutinized document processes required for freedom of information or data privacy requests, as well as regulatory submissions and audit.

Automatically Declare and Classify Content

Content Manager is capable of automatically classifying content so your staff doesn't have to. Content Manager can be trained on existing documents, the business classification scheme and notes to learn how to identify and classify new content. Each document is "read" and evaluated based on a series of pre-defined categories, weightings and confidence levels. Once assessed the content is classified and placed into an appropriate folder. In addition, when integrated with OpenText™ ControlPoint unmanaged content and records sitting in system repositories can be identified and automatically declared. Policy is applied to move this information into Content Manager for its ongoing management.

The combination of Content Manager and ControlPoint to deliver automatic declaration and classification acts like a safety net to improve the capture of valuable content and records that may have slipped through gaps in the process, it also improves the accuracy of applying policy and security.

Control and Connect All SharePoint Content

Content Manager helps you leverage the full value of Microsoft SharePoint as a collaborative platform by applying management rules to automate the capture and management of valuable content and records without impacting users. A set of conditions are defined to identify valuable content and records, once satisfied a further set of instructions guide how the object should be created in Content Manager. With Content Manager, you can manage, finalize, relocate, and archive SharePoint content such as blogs, wikis, discussions, documents, forms, published pages, and sites according to established business rules. Content Manager allows you to balance the long-term compliance needs of your business—by securing valuable business information—with the day-to-day collaborative needs of staff.

Integrate Information Lifecycle Management with Corporate Applications

In order to leverage the full value of information, it makes sense to integrate some corporate applications with the enterprise content management system; for example, this is particularly true if you want to see all information relating to a specific customer or project. A project file usually contains emails, proposals, contracts, and plans related to the project, as well as invoices and other financial documentation linked to either suppliers or customers. In this situation, an authorized staff has the ability to access the project file and view all content within it according to their security and access privileges.

Content Manager supports integration with line of business systems via its published software developer kit (SDK). Integration can be customized to suit your specific requirements or it can be prepackaged such as the Content Manager SAP integration module.

Streamline the Management of SAP Records

The Content Manager SAP integration module captures and organizes SAP ArchiveLink documents and SAP metadata into Content Manager automatically, across the enterprise, for review by both SAP and non-SAP users. This capability gives you more efficient information sharing and control of your enterprise SAP information. The SAP integration module provides an SAP-certified document repository for SAP ArchiveLink, allowing you to store, retrieve, and update SAP information from a single location. The integration lets you store information from SAP ArchiveLink into a container of related information in Content Manager so you get a single view of all the information you need, without having to run the SAP application.

Manage Corporate and Legal Filing Structures in Unison for Enterprise Scalability

Many ECM systems are limited in their ability to connect legal client files with the corporate file plan or business classification scheme (BCS). This leads to siloed information, the need to migrate critical content and records at some point in time, and limited scalability of the ECM across the enterprise. Content Manager uniquely caters to both corporate and legal filing structures simultaneously, improving authorized information sharing and enterprise scalability across business units. With Content Manager, you can link the files within a client matter to the corporate file plan where the appropriate retention and disposition policies can be applied automatically.

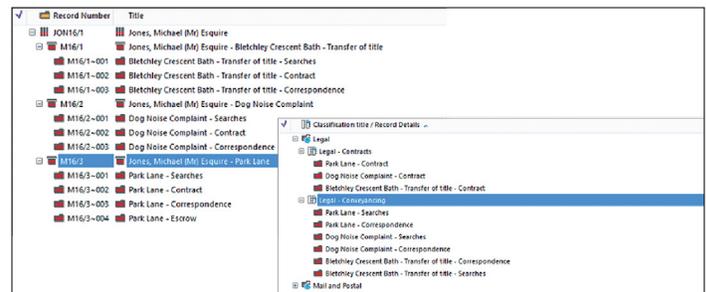


Figure 2. Client-matter filing structure

Accelerate User Adoption and Productivity

Knowledge workers today have higher expectations for interacting with corporate applications. The bring your own device (BYOD) phenomenon has driven the need for anytime accessibility across a range of devices including laptops, tablets, and smart phones—with the same level of information security and integrity as internal systems.

Deliver Intuitive Web Access across a Range of Devices—Anytime

Content Manager offers a modern Web client that is the interface of choice for knowledge workers. Utilizing HTML5 technologies, Content Manager's Web client automatically responds to different devices and presents information in a layout that is consistent and utilizes the display landscape efficiently. This zero-footprint interface is not only easy to deploy, but also supports key user functionality, including dynamic and advanced search, saved searches, browsing the business classification scheme, document viewing, edit, create, seamless check-in and

out, tag and task, workflow, emailing links, advanced record requests, and generating reports. Users have the flexibility to configure the size of result lists while also being able to navigate through multiple pages.

Improve the Productivity of Mobile Workers with Geo-Spatial Tagging

Content Manager supports a GPS location property for objects (content and records) and locations (people and organizations) under its management. There is a multitude of opportunities to leverage the GPS location property to better manage assets or properties at specific locations for organizations such as a Local Government, Oil & Gas, Power and Water, Utilities, Mining and Property Management companies.

This GPS location property can be used to link or find content associated with single or multiple geo-points which will be particularly useful for mobile workers. Users may wish to find all content associated with a specific location or an area (such as a National Park) and by using the quick-select tool they can easily select the points of interest from Google Maps. Content Manager will return all objects the user is authorized to access associated with the location.

Save Time Onboarding Users with “Instant On” Access

Content Manager’s “Instant On” feature allows you to pre-configure access permissions for new users that haven’t been entered into the system. The user is prompted to register themselves and provide relevant user information based on a login template. To provide better control of access, this function can be limited to users that belong to specific domains.

Alternatively, a new user may log in to Content Manager as a guest with credentials and security set according to the specific login name that is used.

Improve Access and Productivity with Seamless Desktop Integration

Content Manager is integrated with industry-leading authoring, messaging, and collaboration applications such as Microsoft Office, SharePoint, Outlook, and Lotus Notes Mail. Integration with line-of-business applications such as SAP helps you to easily capture, update, and reuse this business information.

Microsoft-style ribbons, shortcut, and quick access toolbars allow users to customize their desktop experience and streamline day-to-day document creation, editing, and retrieval processes.

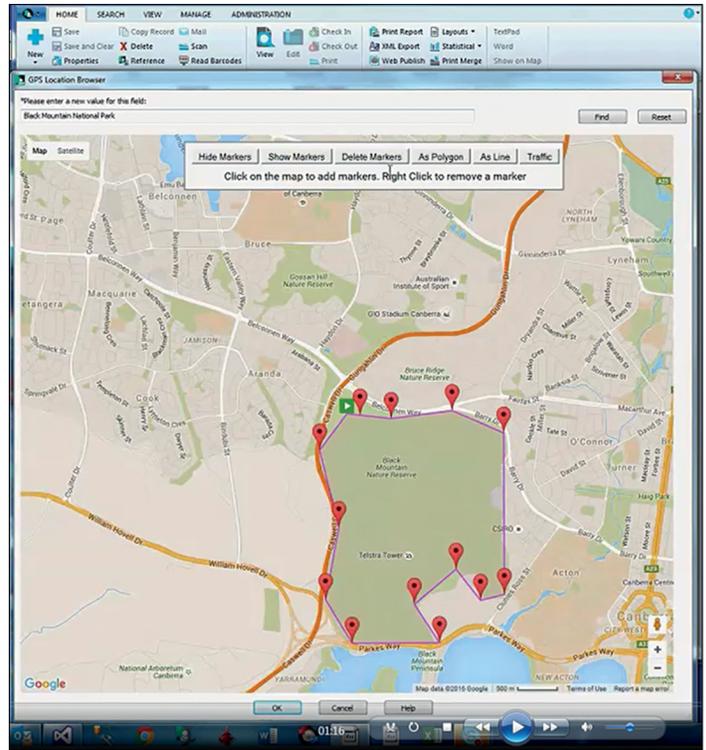


Figure 3. Searching with geo-spatial markers on Google Maps

Content Manager is adaptable to diverse business processes and information management needs and can be extended through integration tools such as the SAP ArchiveLink integration module, external warehouse integration (Iron Mountain and oneilBridge), and the SharePoint compliance app.

Capture and Manage Your Email— Automatically, Seamlessly, and Efficiently

You can easily file, retrieve, and work with email content in exactly the same way you work with Microsoft Office documents. Content Manager’s advanced email integration uses message IDs in Microsoft Outlook and Lotus Notes email to identify duplicate messages and prevent them from being captured multiple times. Minimizing the number of duplicate emails captured significantly reduces information footprint, search retrieval times, and associated costs.



Figure 4. Navigation within Microsoft Outlook email conversation

The capture of conversation IDs assigned to Microsoft Outlook emails in the form of metadata simplifies the navigation and search for emails within a single conversation thread.

There are Content Manager integrations with both Microsoft Outlook (Exchange 2010, 2013, and Exchange Online) and Lotus Notes email that are completely server side. This means you don't have to install Content Manager software on user email clients, which removes much of the deployment and maintenance burden from IT. The integration automates the capture of email from the user's email account into Content Manager through a series of dynamically linked folders, which appear in the user's email client.

Improve Efficiency and Enterprise Performance

Information is probably one of the most valuable assets in an organization. Taking advantage of this critical corporate asset through competent lifecycle management can enhance your ability to meet governance and regulatory compliance obligations, and gain a competitive advantage. Content Manager helps you to manage business content and records efficiently, physical and electronic, regardless of source. Automated rules, classification, and workflow capabilities facilitate the easy capture, management, and discovery of your business content from creation to disposal, improving staff efficiency, security, and enterprise performance.

Save time with Powerful and Extensive Search

Content Manager offers powerful, extensive built-in metadata that uses strong relational capabilities and OpenText™ IDOL-powered indexing to help you quickly and easily locate business information. Search speed can be improved by configuring Content Managers' IDOL indexes to boost operational efficiency and worker productivity as they interact with information. Staff can find business documents and records faster, with greater accuracy and relevance. Saved searches can be created on an individual or enterprise-wide basis to simplify the process of running regular or multi-faceted searches.

Optical Character Recognition Makes Images Searchable

Content Manager's optical character recognition (OCR) module leverages the IDOL Image Server to either manually request an OCR rendition or by automatically processing image files within the indexing process. When an image file is detected it is sent to the IDOL image server for text extraction, then the text file is stored as an OCR rendition of the original, which can be easily searched.

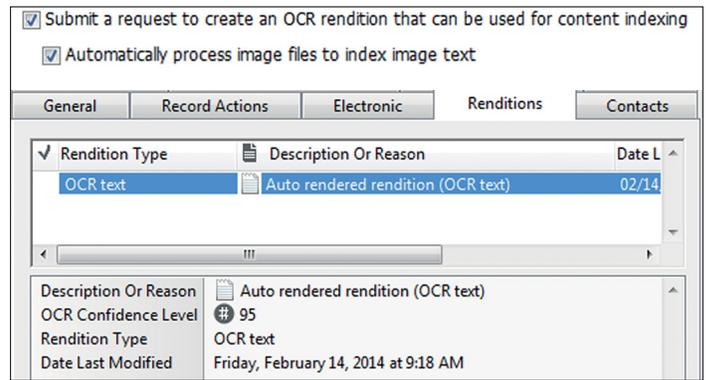


Figure 5. OCR options in Content Manager

Automatic Records Classification and Folder Creation Increase Filing Accuracy and Efficiency

Content Manager has the ability to classify content and records automatically based on detailed IDOL categories. Sub-folders can be automatically created according to predefined rules so newly classified content is placed into a folder as opposed to being attached directly to the classification term. Auto-classification improves both filing efficiency and accuracy, removing the manual and error-prone task from staff.

Content Manager's integration with ControlPoint facilitates the identification and declaration of valuable content and records sitting outside of the Content Manager repository found in other enterprise systems. When this content is declared, it is moved into Content Manager and assigned a holding classification. Once indexed, Content Manager auto-classifies this content according to detailed IDOL categories and moves them to an appropriate folder or creates a new folder as needed.

Manage in Place Where Content Offers Most Value

It doesn't always make sense to move critical content and records into a central repository, there are times when the content is best left in the authoring application where it offers the most value. Content Manager

uses a manage-in-place framework to apply holds to content in external repositories without the need to migrate it to a central repository. When on hold, Content Manager takes control over the contents retention and security. This in-place management feature leverages the IDOL Connector Framework and supports any subscribing repository.

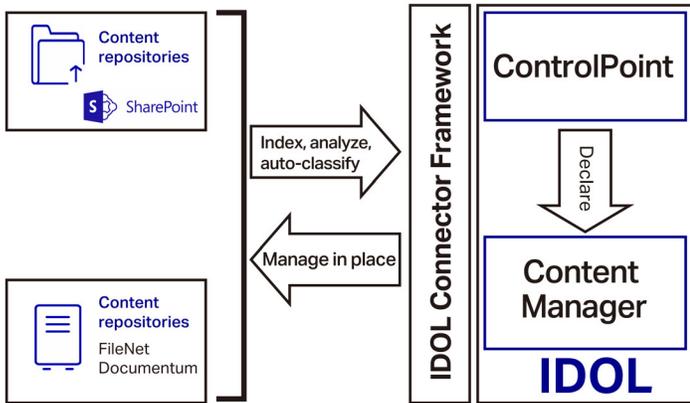


Figure 6. Content Manager manage-in-place framework

Optimize Storage to Improve Scalability and Responsiveness

The overwhelming volume of human information being created and consumed in the course of daily business activities requires greater scalability and performance from your enterprise systems. Now more than ever, you need to be able to manage even larger record sets while providing timely access for staff potentially across hundreds of global locations.

Content Manager offers document stores that have been designed to balance the need for highly responsive, fast document capture and retrieval with the use of cost-effective secondary storage. Configurable document caching, distributed stores, and tiered storage delivers optimum responsiveness for users and increased, efficient performance for the business.

Coupled with single instancing for email and documents you can significantly reduce duplication of this information and the overall volume of content to be stored.

Simplify Deployment

Reduce Deployment and Maintenance Overheads with Zero-Client Install

Many organizations work with constrained or shrinking IT budgets that drive the need to simplify deployment and maintenance of enterprise applications. Content Manager offers zero-footprint (thin) and desktop client interfaces so you can satisfy:

- User and administrator functionality requirements
- Enterprise application integration needs
- IT deployment constraints and goals

Content Manager's zero-footprint Web client requires zero install and supports the record and document management needs of daily contributors and collaborators. Through the Web client, users can—search, view, tag and task, edit, create, check-in and out, access, complete workflow tasks, email document links, request physical records, and generate reports.

With email being one of the primary communication tools for staff (where conversations are now documented and transmitted instead of being spoken verbally), this means that email applications are typically deployed on all PCs and laptops within the organization. For organizations that must capture, access, and manage all employee email, Content Manager's server-side integration with Microsoft Exchange (2010, 2013, and Exchange Online) and Lotus Notes email remove the need for client software installation. It also lessens the burden and cost of IT.

Support Hybrid and Cloud Initiatives

Many organizations are looking at Office 365, SharePoint 2013, and even Google Apps as their first step toward the cloud. But, how do you make sure your documents and records are being managed according to global standards and regulations while taking advantage of what cloud has to offer? Content Manager is evolving to support the hybrid and cloud goals of organizations around the world, balancing the need for records security, control, and integrity with usability.

Office 365 and SharePoint 2013 Integration

Content Manager integrates with Office 365 via the desktop client and with Exchange Online via a server-side integration. The integration with SharePoint 2013 is achieved through Microsoft's remote client-side object model that utilizes an app for deployment. The Content Manager SharePoint integration is transparent to users, having a similar look and feel to SharePoint 2013 and Office 365.

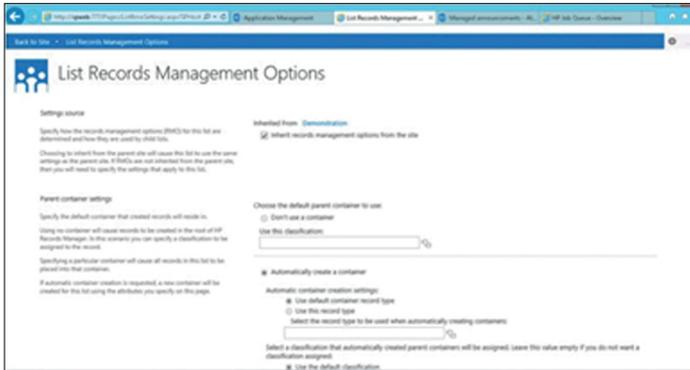


Figure 7. Microsoft Office 365 and SharePoint integration

Improve Security of Access, Communication, and Content Storage

Content Manager supports four types of user authentication—Integrated Windows Authentication (Active Directory) and Explicit Windows Authentication for the desktop client, Active Directory Federated Services (ADFS), and Google Apps authentication for the Web client. Users are authenticated to the Web client via Security Assertion Markup Language (SAML)-based single sign-on (SSO). Content Manager can be configured to use standard HTTPS protocol for transmission of data, which means the client respects the HTTP proxy settings that are configured in your browser options. Content Manager not only encrypts information as it is being transmitted but also encrypts content in the document store. The use of “symmetric key encryption” means that even data center staff for a hosted Content Manager solution would not be able to open the documents in the store. You can be confident that your documents and records are protected from unauthorized access.

Meet the Demands of Global Regulation, Risk Mitigation, and Corporate Accountability

In today’s age of Big Data, a lot of content is generated in the enterprise and on social media platforms. It’s accessed through a range of devices from any number of locations. This scenario makes it imperative to have systems in place that can preserve information integrity and enable corporate accountability. You must be able to validate the authenticity, accuracy, and source of information used in day-to-day business activities while facilitating access for information workers with enhanced levels of security and audit.

Content Manager enables you to apply security, retention, and disposition policies automatically to enterprise content and records to help

you mitigate risk and support compliance initiatives. Retention rules can be applied across multiple jurisdictions, so the process of determining what records can be destroyed can be automated, running as a centrally controlled process.

Expand Information Security for Improved Accessibility

Content Manager provides strict security and access control for all managed content and records. Only authorized users are able to access the information, thereby protecting corporate information from inappropriate access and misuse. Extensive and configurable security for all users is essential in providing greater accessibility to enterprise content.

With Content Manager, you can manage security at the organizational level right down to an individual field on a form, helping you to build protection into your processes and reinforce your overall security model. As a result, you can share information more efficiently and cost-effectively across your organization while increasing productivity and reducing risk.

Enable Greater Corporate Accountability

Content Manager provides extensive audit capabilities with both online and offline log files that can be configured to capture events or actions on any object it manages, not just records. This means that all changes to control data, such as retention schedules, categories, users, and security policies, are tracked in more detail. Configure audit logs that not only capture key baseline information but also the finer details of the change, with before and after values logged.

When reviewing historic log files, it is useful if you can understand the reason behind a change and its business context. This insight is not always obvious from the change itself, particularly if the log file is being reviewed many months or years after the change occurred. For this reason, Content Manager can require users making changes to provide a reason for the change, which is logged.

Enable Compliance with Global Standards and Best Practices

Content Manager is designed to meet the international standard of records management, ISO 15489: 2001 and elements of ISO16175: Principles and Functional Requirements for Records in Electronic Office Environments. It supports major regulatory standards, is certified against DoD5015.3 V3 and Australia’s VERS, and leverages more than 30 years of proven, successful deployments in government and regulated industry. Content Manager is an ideal solution for global enterprises that need to meet regulatory compliance obligations, reduce risks, and improve overall productivity.

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Automatically Synchronize Retention Policy with Changing Legal Mandates

Content Manager's integration with Iron Mountain Policy Centre Solution supports the legally defensible lifecycle management of your business content while reducing the cost and complexity to do so. This unique integration facilitates legally based retention and disposal for specific industry verticals such as; Government, Life Sciences and Financial Services across many jurisdictions. By synchronizing retention policy in Content Manager with Policy Center's subscription-based global research your retention management is based on up to date legislation and legal citations. Policy modules cover areas like HR, Finance, Asset Management and specialty policies such as Laboratory best practice and HAZMAT disposal. Content Manager enforces the policy at the document or file level (not the store level) giving you greater granularity of management.

Be Prepared for eDiscovery

Content Manager is built on the principle that the information lifecycle of every document and record, including all related information and activities, are "records of business" transactions. As a result, business documents and records are proactively captured, managed, and secured according to corporate classification, retention, and disposal policies.

Through integration with external file systems and archives, Content Manager can control the disposition of electronic content in external repositories, thereby extending its records authority to document archives. The ability to apply legal holds to business documents, to search for and discover this information in the context of business activity, better supports legal discovery.

Manage the Information Lifecycle to Achieve Your Information Governance Objectives

Content Manager is a cornerstone of the OpenText™ Information Governance portfolio of modular solutions. These solutions are integrated through the IDOL Connector Framework to help you access and understand your enterprise content in context, regardless of repository or location. The information governance portfolio enables you to organize, control, and intelligently manage all enterprise content (both records and non-records) with a centralized policy engine that allows you to take appropriate action to achieve your compliance and operational objectives. Content Manager is a proven enterprise content management system that offers the flexibility, usability, and scalability needed to manage your information from creation to disposal, and help you achieve your information governance objectives.

About OpenText

OpenText, The Information Company™, powers and protects information to elevate every person and every organization to gain the information advantage. A leader in Information Management, OpenText offers a comprehensive portfolio across content services, business network, digital experience, security and developer APIs. For more information about OpenText (NASDAQ/TSX: OTEX), visit www.opentext.com.

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