Content Manager

Software Version 24.2

Release Notes

opentext™

Legal notices

Documentation updates

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

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

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

Support

Visit the MySupport portal to access contact information and details about the products, services, and support that OpenText offers.

This portal also provides customer self-solve capabilities. It gives you a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the MySupport portal to:

- View information about all services that Support offers
- Submit and track service requests
- Contact customer support
- Search for knowledge documents of interest
- View software vulnerability alerts
- Enter into discussions with other software customers
- Download software patches
- Manage software licenses, downloads, and support contracts

Many areas of the portal require you to sign in. If you need an account, you can create one when prompted to sign in.

Contents

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 24.2 key new features include: Manage in Place support for Google Drive Store, support for shared channels in the Microsoft Teams integration, seamless renewals in the Subscription model licensing (CM Select), revamped UI and user experience in the Mobile App, and two new features in our Web Client: the "custom views" feature that allows easy swapping of how data is visualized based on use case, and improvements to bulk upload of documents.

Introduction to Content Manager 24.2

This is the first patch release of the Content Manager 24.2 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 **User Experience** theme.

For technical details, including the support matrix, refer to **CM24.2_Spec.pdf** and **CM24.2_ 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_219145

> **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:
>
> - CM24.2_OpenIDAuthentication.pdf
> - CM24.2_Zerofootprint_Integration.pdf
> - CM24.2_MSTeams_Integration.pdf
> - CM24.2_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 **24.2** 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 **CM24.2_Spec.pdf**.

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

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.

New Features

Platform Continuance

Content Manager 24.2 introduces support for:

- IDOL 23.4 and Media Server 24.1.0.0

- KeyView 24.1.0.0

- Support for Autoclassification with Enterprise IDOL

Content Manager Client

Manage in Place for Google Drive store

Content Manager now supports Google Drive store repositories for the Manage in Place feature.

To set up a Google Drive store for Manage in Place, in the Content Manager Enterprise Studio, configure your dataset with details to access the storage in Google Drive. For example, Private key and Application Scope.

In the Content Manager Enterprise Studio, right-click the dataset for which you want to configure Google Drive store, and then select **Properties**. Click the **Google Drive** tab and enter the details.
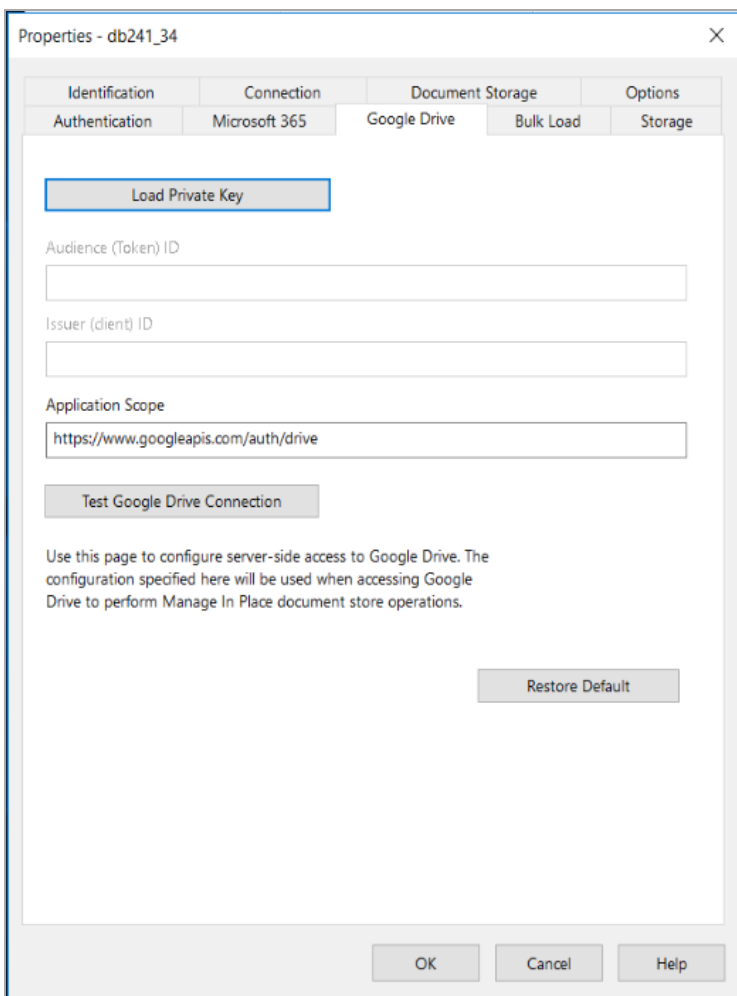

Figure 1: Configure Google Drive in Enterprise Studio

For more details, see *Creating a Content Manager dataset* section in *Content Manager Enterprise Studio* help.

Once Google Drive is configured, in the Content Manager client you can create Manage in Place Google Drive document stores.

In the Content Manager client, navigate to **Administration > Manage in Place Adaptors** and create Manage in Place Google Drive Store. Actions you can take on this managed in place store are: you can keep a backup of the documents you are managing in place, scan the items for updates, and move the Manage in Place records to the nominated document store.
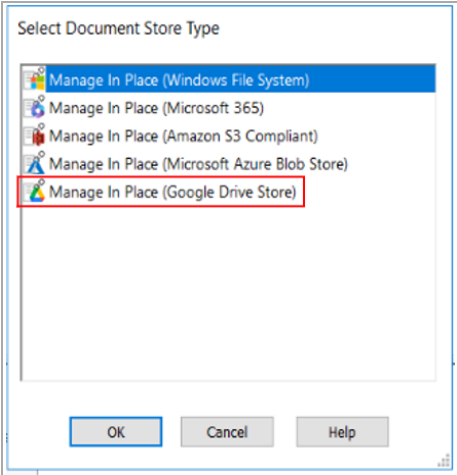

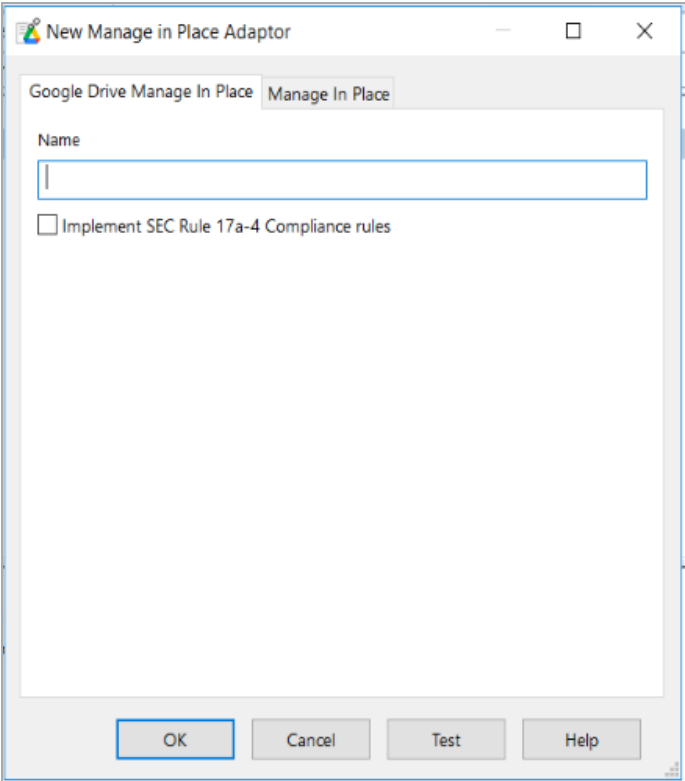**Figure 2: Create new MiP Google Drive Store adaptor**

Figure 3: Details to fill for MiP Google Drive in Content Manager

For more details, see *Creating Manage in Place document stores* section in *Content Manager* help.

Auto renewal of AutoPass license

For Content Manager Select customers who use a subscription license that is renewable each year, we have improved the transition between licenses to make it seamless. You can now add a new upcoming license file to an existing installation and have that new license automatically take effect on the expiry of the old license. Add the new license file to the existing store of licenses and the transition is seamless after the expiry of the original license(s).

> **NOTE:** When the new license file is seamless deployed to the Work Group Server, the ongoing jobs may have an impact.

To disable the AutoPass future license activation feature, on the Workgroup Server where you have installed and set up the AutoPass license, open the **TRIMMetrics.ini** from the installation folder, add the **DisableAutoPassLicenseAutoRenewal** parameter under the **[Server]** section and set the value to **1**.

For more details, see *License* section in *Content Manager Enterprise Studio* help.

Content Manager Web Client

Ability to configure views for the result set

When viewing object lists (whether records or other object types) in the Content Manager Web Client, you can now create your own custom views so that the data is displayed in the best way for their use case. Each view will control what metadata is on display. Users can edit these views and quickly swap between them.

The **CM Desktop Client** view is the default view. You can update this view or create a new view and set that as **CM Desktop Client** view. If you update **CM Desktop Client** view or set a new view as **CM Desktop Client** view, the same is reflected in Content Manager client or vice versa.

The **View** option is displayed only when **Grid view** is selected on the result set.
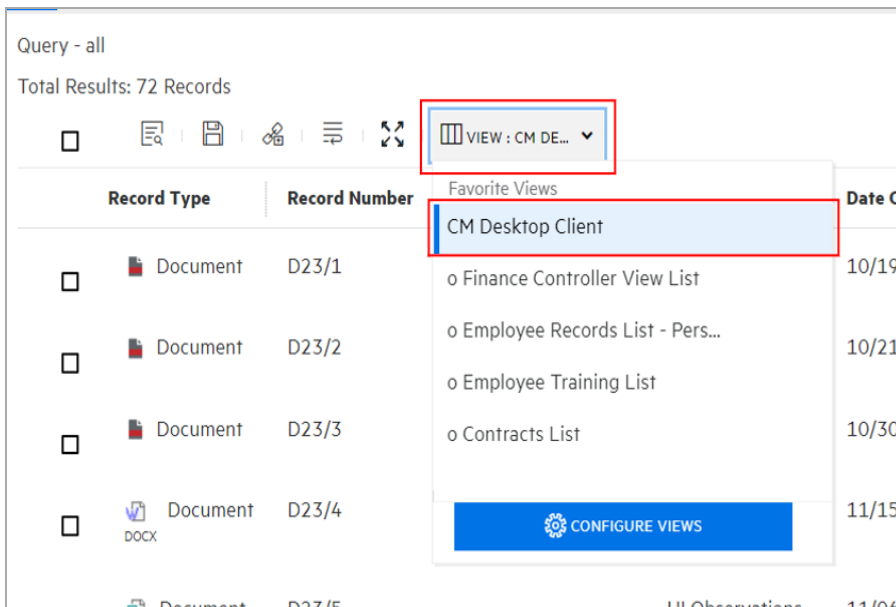

Figure 4: View option in result set

The **Configure Views** dialog allows you to create a new view, update an existing one, rename, create a copy, mark a view as your favorite, set as CM Desktop Client view, or delete a view. Click **Views** and then click **Configure Views** from the drop-down to open the **Configure Views** dialog.
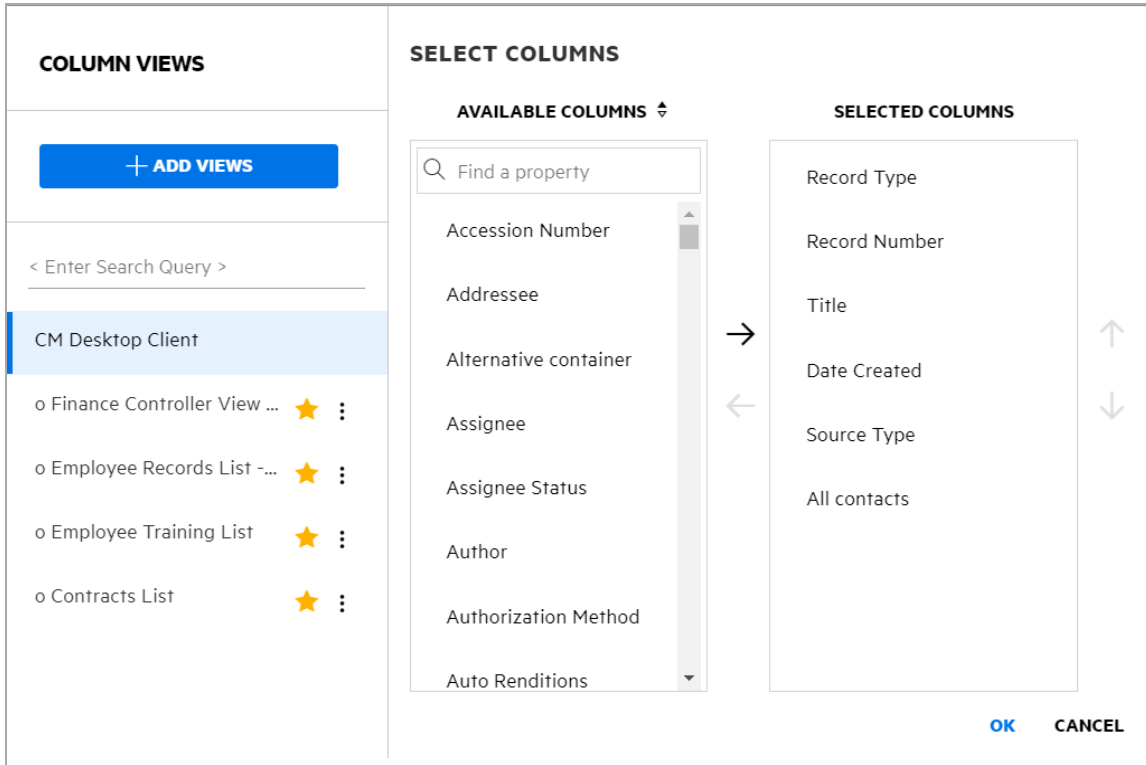
Figure 5: Configure views dialog

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

Easier bulk upload for Record Creation

When you create a new record either by using the **New Record** option or by the drag and drop method, the **Create New Record** form is displayed. This Record Creation form has now been enhanced for easier bulk upload of multiple records.

The **Create New Record** form is enhanced with the option to upload electronic document(s) on the left panel. The right panel displays the option to select a Record Type. Based on the Record Type selection, the rest of the record entry form fields are displayed. You also have an option to use one form for all records being created, or to have separate forms per record.
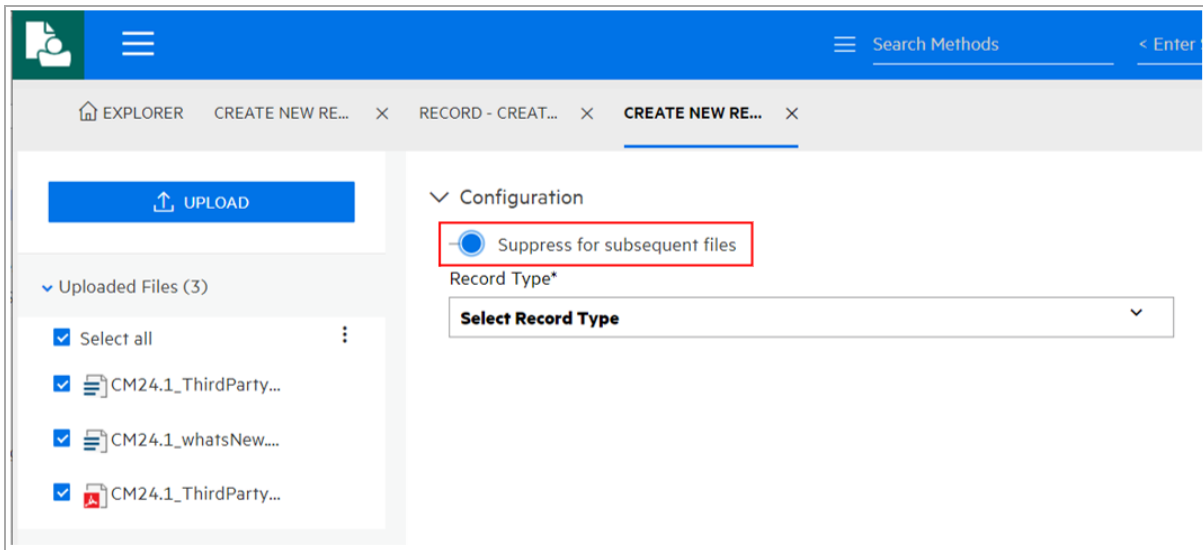
Figure 6: Option to use one form for all records

If you want to drag and drop more documents, you can either drag and drop to the left panel of the **Create New Record** form or click **Upload** on the left panel. The document list is appended with the new documents under the **Uploaded files**.
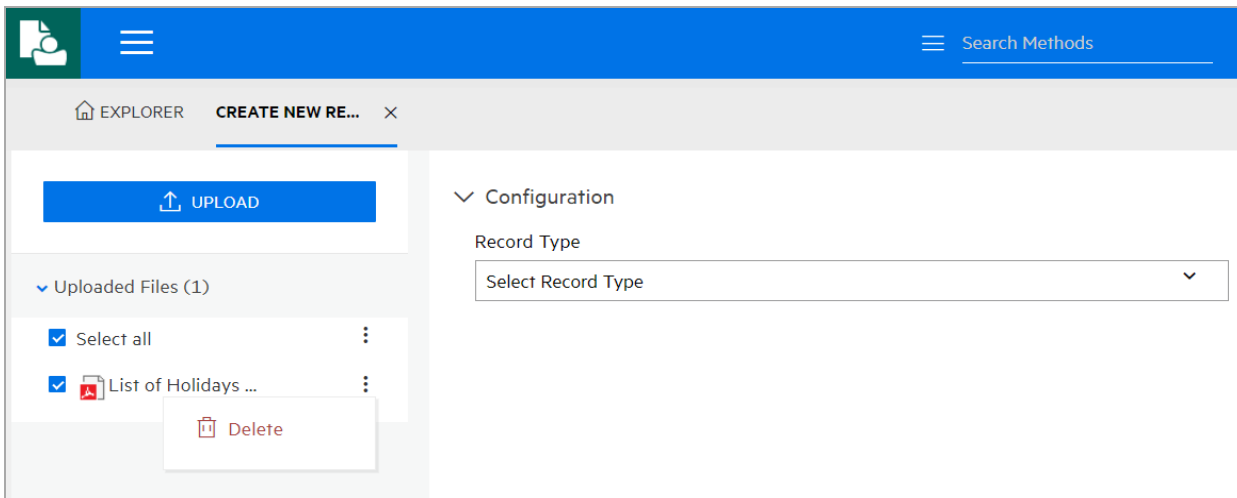

Figure 7: Enhanced Create New Record form

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

Key Protector Tool

The Content Manager Key Protector Tool allows you to encrypt the Client ID and Client Secret for OpenID connect authentication. The tool takes the Client ID or Client Secret as input (Key) and provides the encrypted version of the Key which can then be used in the place of Client ID or Client Secret in the configuration file (**hprmServiceAPI.config** or **hptrim.config**).

The **TRIMKPTool.exe** tool is available in the bin/Bin folder of Web Client, WebDrawer, or Service_ API in your installation folder. For example, **C:\Program Files\Micro Focus\Content Manager\Service_API\Bin**.
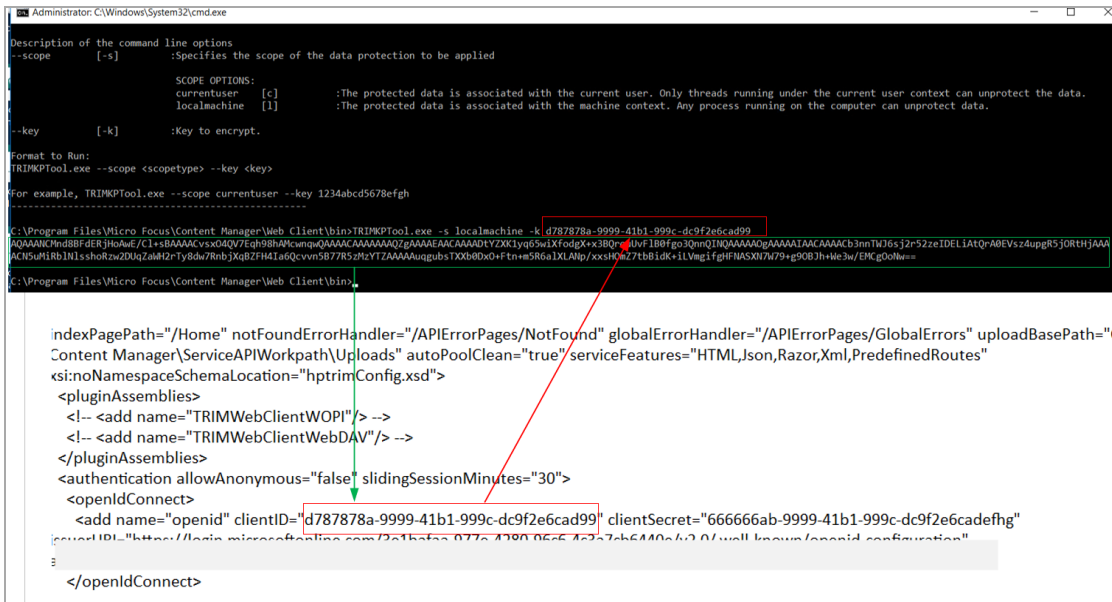

Figure 8: Key Protector Tool

For more details, see *Key Protector Tool* section in *Appendix C* of *Content Manager Web Client Installation and Configuration* document.

Content Manager Microsoft Teams Integration

Support for Shared Channels

The Content Manager Microsoft Teams integration now supports shared channels. You can add the Content Manager app to capture content in your shared channel(s). The members of the shared channel can capture content to the Content Manager and perform all the operations on this channel in the same manner followed for standard or private channels.
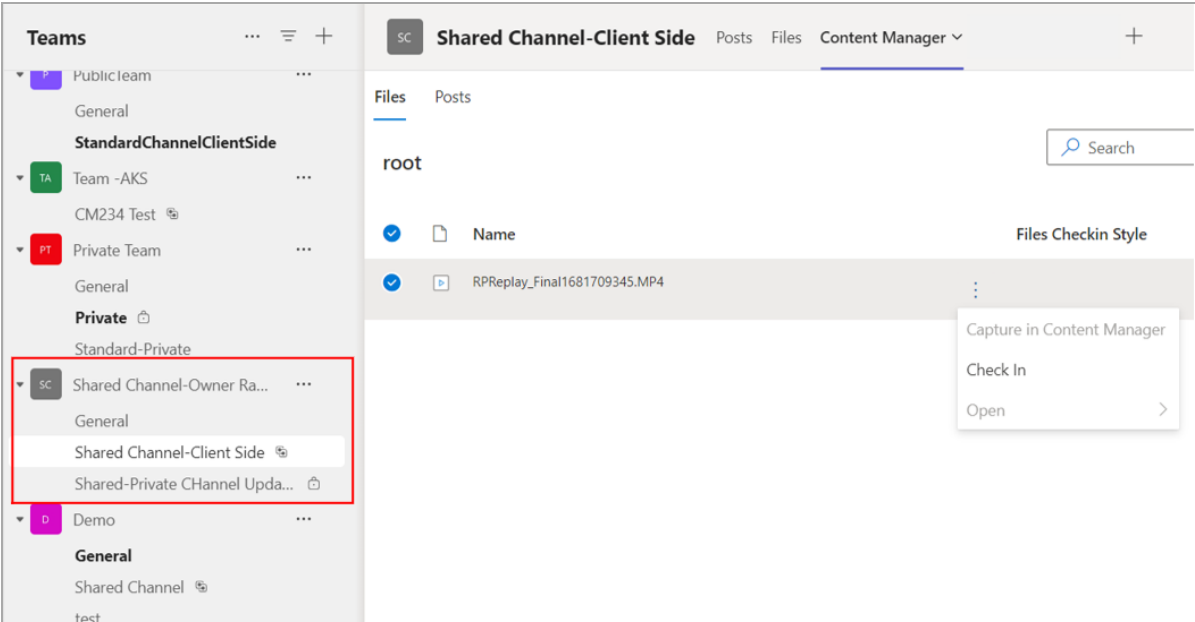

Figure 9: Content Manager app in Shared channel

For more information, see *Capturing MS Teams content to Content Manager* section in *Content Manager MS Teams integration* help.

Content Manager Mobile App

Enhanced UI

> **NOTE:** Available on Mobile App version 24.x onwards.

The Content Manager Mobile App user interface and experience are enhanced. Mobile App now adheres to OpenText UX standards, bringing a modernized look and feel to the user experience.
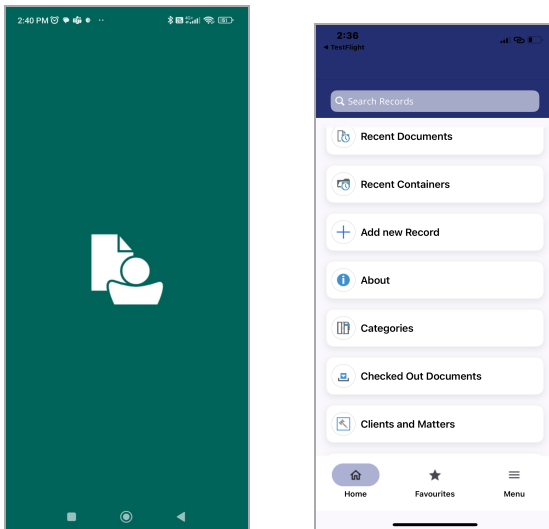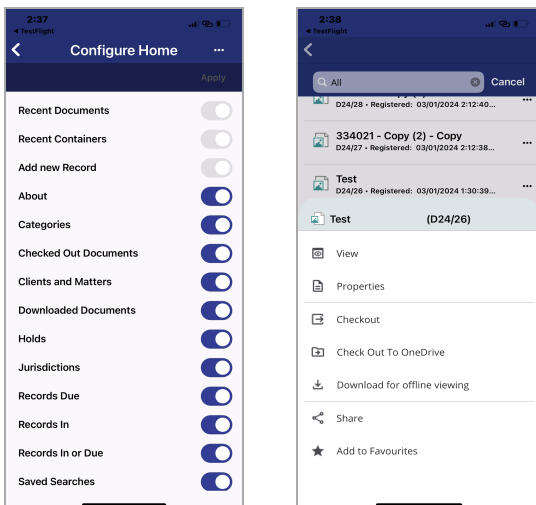

Figure 10: Mobile App Splash screen and Home page

Figure 11: Mobile App Options page and Context menu

Obsoleted Platforms

Refer to **CM24.2_Spec.pdf** for details on the Support Matrix.

Obsoleted Features

No features are obsoleted in Content Manager 24.2 release.