# Content Manager

Software Version 24.4

Release Notes

opentext

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

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

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# Content Manager Release Notes

## **Overview of Content Manager**

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

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

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

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

Developed with more than three decades of information management expertise, Content Manager enables organizations to lower operating costs, secure information, enhance compliance, and increase productivity.

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

## Introduction to Content Manager 24.4

This is the first release of the Content Manager 24.4 program series. This release includes all fixes and enhancements that were shipped in the previous releases of Content Manager. For details of the previous releases, please refer to the relevant release notes.

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

The Content Manager 24.4 key new features include:

- Content Manager Client
  - Ability to back up configuration files, on page 8
- Content Manager Web Client
  - Support to Checkout documents to Google Drive, on page 9
  - Ability to refine the search criteria, on page 10

- Content Manager MS Teams Integrations
  - Ability to revoke an exposed record, on page 12

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

For technical details, including the support matrix, refer to **CM24.4\_Spec.pdf** and **CM24.4\_ Install.pdf**. Content Manager documentation can be found on the Documentation portal.

**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 addins should refer to the following documents:

- CM24.4\_OpenIDAuthentication.pdf
- CM24.4\_Zerofootprint\_Integration.pdf
- CM24.4\_MSTeams\_Integration.pdf
- CM24.4\_MobileApp\_Setup.pdf

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

To access the included items, on the Support Portal Knowledge Base page:

- Select Content Manager (Records Manager/TRIM) as the Product filter
- To display the list of included Defects, select Known Problems as the Document Type filter.
- To display the list of included enhancements, select **Enhancement Requests** as the **Document Type** filter.
- Type 24.4 into the Search Terms field and then click Search.

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

# New Install and Upgrade Considerations

**IMPORTANT:** When you install Content Manager for the first time or you upgrade from the previous version and you encounter security issues, then refer to *Security considerations* section in **CM24.4\_Spec.pdf**.

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

## **Content Manager Outlook Integration**

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

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

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

## Limit for temporary database size in SQL

As part of the 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 24.4 introduces support for:

- IDOL 24.3 and Media Server 24.3
- KeyView 24.3

## **Content Manager Client**

#### Ability to back up configuration files

From Content Manager 24.4 onwards, when you upgrade to later versions of Content Manager, the configuration files are backed up in their respective installation folder with a .bak extension.

If you have custom configurations in any of the above mentioned configuration files, during upgrade, they will be retained with a .bak extension in the respective installation folder.

^		
Name	Date modified	Type
	9/11/2024 1:17 PM	File folder
	8/20/2024 3:21 PM	File folder
	9/2/2024 10:49 AM	File folder
	9/11/2024 1:17 PM	File folder
	9/2/2024 10:49 AM	File folder
	9/2/2024 10:49 AM	File folder
	8/20/2024 12:31 PM	File folder
	9/11/2024 1:17 PM	File folder
	9/2/2024 10:49 AM	File folder
	8/20/2024 12:31 PM	File folder
	9/2/2024 10:49 AM	File folder
	9/2/2024 10:49 AM	File folder
	9/11/2024 1:17 PM	File folder
	8/20/2024 12:31 PM	File folder
	8/20/2024 12:31 PM	File folder
	8/20/2024 3:22 PM	File folder
	2/24/2022 4:04 PM	CSHTML File
Global	2/24/2022 4:04 PM	ASP.NET Server A
hptrim	9/11/2024 3:34 PM	XML Configuratio
hptrim.config.bak	9/11/2024 12:29 PM	BAK File
hptrim.config.template	9/5/2023 10:38 AM	TEMPLATE File
A hptrimConfig	8/30/2024 12:25 AM	XML Schema File
LICENSE	2/24/2022 4:06 PM	File
💽 mobilelogin	2/24/2022 4:04 PM	Microsoft Edge H
Veb Web	9/11/2024 1:19 PM	XML Configuratio
Web.config.bak	9/11/2024 12:29 PM	BAK File
web.config.template	7/24/2024 11:10 AM	TEMPLATE File

Figure 1: Backed up configuration files

For more details, see *Backing up configuration files* section in the *Content Manager Installation and Upgrade Guide*.

## Content Manager Web Client

#### Support to Checkout documents to Google Drive

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

**NOTE:** Currently, as part of the collaborative editing mechanism, Web Client only supports CheckOut to Google Drive with initial authentication by Google. Support for other authentication mechanism, such as, Azure, ADFS, and Windows will be implemented in the upcoming release.

RECORD - URI:493	×				
15	Ouery-urb493 Toha Results: 1 Record	CHECK OUT TO GOOGLE DRIVE Select Google Drive Folder Content Manager Documents Share with Q + No location found.	Q. B	ACTIONS PROPERTY INVEST CONST RESULTS RESULTS RESULTS RESULTS RESULTS	ES V V
				ADD/REMOVE	
				MORE	~
		ок	CANCEL		

Figure 2: Check Out to GoogleDrive in Web Client

Record } I PB I de II ∓	SELECT GOOGLE DRIVE FOLDER	
24/479 ist4	<ul> <li>Content Manager Documents</li> <li>testingCM</li> </ul>	ACTIONS
	testing.en	UPDATE
	ок	CANCEL
		REQUEST
		WORKFLOW
		ADD/REMOV
		MORE

Figure 3: Check Out to a particular folder in Google Drive

CHECK IN RECORD		
Record Number D24/576		
Make a new revision		
Discard any modifications made		
Comments		
		li
Keep checked out		

Figure 4: Checking in record to Content Manager

For more details, see *Checking out and checking in from GoogleDrive* section in *Content Manager Web Client* help.

#### Ability to refine the search criteria

The **Grid** view includes a new **Filter** option to refine the search based on the columns available in the view.

If you need to apply filter based on the column that is not currently available in the view, then add the column to the view to make it available in the filter panel.

	FILTER	×	Query - cre Total Resu	lts: 342 Records	& ≅ . <b>∀</b> . ∷.	🕒 👻   🛄 VIEW : CM DE 👻
				Record Type	Record Number	Title
ents	RECORD TYPE	×		📫 File Folder	23/1	Folder_SoK
ds	docume Document			Document	G24/2	goals
ds	Standard Document			Document	G24/3	samachar
	RECORD NUMBER	×		Document	G24/1	jhbhbvh
	TITLE DATE CREATED	×		Document	G23/6	cake
	Date range	~		Document	G23/2	berry
	From MM/DD/YYYY hh:mm:ss			Document	G23/7	Meditation des
	To MM/DD/YYYY hh:mm:ss	∺ -		Document XML	G23/1	MediaInfo
	RESET	FILTER		Document	G23/4	MF_logo

Figure 5: Filter option in Grid view

FILTER	×	l and number:G24* ults: 3 Records 尾 □ 🖀 □ 🔏 □ □ 睪	- Ƴ - X - B IIIviev	V : CM DE N	
>RECORD TYPE	8	Record Type	Record Number	Title	Date Created
✓RECORD NUMBER	8	Document	G24/3	sama	08/29/2024 a
G24*		Document	G24/2	goals	08/29/2024 a
TITLE	8	Document	G24/1	jhbhb	08/12/2024 a
> DATE CREATED	19				

Figure 6: Refined search result

For more details, see Grid view in Result tabs section in Content Manager Web Client help.

## **Content Manager Microsoft Teams Integration**

#### Ability to revoke an exposed record

You can revoke an exposed record in a Channel or a Site of the Content Manager MS Teams Integration. Navigate to the Channel or Site, select the record for which you want to undo the expose of. Click the Menu or More option and select **Revoke Expose**. The exposed record is removed from the MS Teams Channel or Site.

For more details, see Content Manager MS Teams Integration help.

Q Activity	Teams ··· ≂ +	o General Posts Files Notes Content Manager ∨ ⊕		
(E) Chat	♦ Discover	Files Posts		
tii) Teams	<ul> <li>Your teams</li> <li>Opentext</li> </ul>	General > Expose Record	✓ Search	
Ealendar	General	① These items are automatically filed to Content Manager using the Checkin Place	? Opentext - General in database 03.	
& Calls	AutoProfilingAuthor Private Channel Client Side 🗅	Name Microsoft-loao rab c-arav@2x(D24 148).ong	Files Checkin Style	Recor
OneDrive	PrivateChannelSrverSide 🗈 Search	Microsoft-logo_rgb_c-gray@2x (D24_148).png	i	D2
	StandardChannelServerSide StandardChannelServerSide	MultipleFileCheck-1 - Copy (2) - Copy (D24_111).docx	:	D2
+ Apps	See all channels	MultipleFileCheck-1 - Copy (3) - Copy - Copy (D24_104).docx	Capture in Content Manager Check In	D2
	General	MultipleFileCheck-1 - Copy (3) - Copy - Copy (D24_112).docx	Open >	🗟 D3
		New-2 (D24_144).docx	Revoke Expose	Di

Figure 7: Revoke Expose from the Client side Content Manager tab

Activity	CMAppNewScript24	14	
(=) Chat	Sites	Sites > Opentext > Documents > General > Expose Record	× Q
ද්රීා	Channels		
Teams	People	D Name	Files Checkin Style
Calendar	Check In Places	C charles.lalu nvss ebvv jkqh kryy fgab - (11 10 2023, 5 35 45 PM - 11 10 2023, 5 48 47 PM) (D24_27).eml	1
Calls	Check In Styles	efreirfrurvgrgrv (R24_10).docx	1
(neDrive	My Files		
	∧ Search	finger_print_icon_2x (D24_107),png	1
AppNe	Favorite Records	Concerning	
	Recent Documents	General - CM242 (D24_137).eml	Capture in Content Manager
+	Checked Out Documents		Check In
Apps		General - Demo (D24_133).eml	Open
	Records In		Revoke Expose
	Records In or Due	General - demo1 (D24_134).eml	

Figure 8: Revoke Expose from the Server side Content Manager App

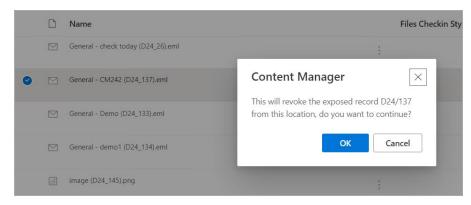


Figure 9: Revoke Expose confirmation dialog

# **Enhanced Features**

## **Content Manager Client**

#### Enhanced Send to Mail option

The **Use Email Template** in the Content Manager and email integration enables you to insert data in the email message based on the **Send record to mail recipient** email template. For this option to be available, make sure to have configured an email template of the type **Send record to mail recipient**.

Available fields	A	Active fields Items	
Access Control		Record Number	_
Access Exclusions Accession Number Addressee Aggregated Disposal Schedu All actions All contacts All Holds All Parts All Redactions		iove Title	
Add to message body as te Attach to message as a sep Use Email Template		ent	>

Figure 10: Use Email Template in the Metadata tab

	🕫 Content Manager Document : D24/45 : D22 16 - Message (Rich 👂 Search 🔟 💳	o x
File Message Ins	ert Options Format Text Review Help Content Manager	
Paste B I U	A*       A* <td< th=""><th></th></td<>	
Clipboard 😼	Basic Text 🙃 Names include Tags 🖓 Voice Apps Editor Immersive	
То	Administrator	
Send Cc	testuser@spgal.com	
Subject	Content Manager Document : D24/45 : D22 16	
RecordList		

Figure 11: Email draft using the Use Email Template option

## Content Manager Microsoft Teams Integration

#### Enhanced search functionality for Channels and My Files

The Search functionality in the client side Channels (Teams) and the server side **My Files** is enhanced to search the current and its sub folders. The Search functionality supports searching with starting strings of a file name or the entire file name in the current and its sub folders. For example, in the file name, Multiple Files Demo, you can search for Multiple, Multiple Files, or Multiple Files Demo.

Click **Teams** on the left pane (client side) and navigate to a channel where you want to perform the search. Enter the starting string(s) in the Search box. The search is performed on the current and its sub folders, and the result is displayed.

#### OR

Navigate to **My Files** in the server side Content Manager app and enter the starting string(s) in the Search box. The search is performed on the current and its sub folders, and the result is displayed.

○ General Posts Files Notes Content Manager ∨ 🕀		
General	Multiple	× ۲
① These items are automatically filed to Content Manager using the Checkin Pla	ace Opentext - General in database 03.	
Name MultipleFileCheck-1 - Copy (116) - Copy - Copy.docx	Files Checkin Style	Record
MultipleFileCheck-1 - Copy (117) - Copy - Copy - Copy.docx	:	
MultipleFileCheck-1 - Copy (117) - Copy - Copy.docx	÷	
MultipleFileCheck-1 - Copy (118) - Copy - Copy.docx	1	
MultipleFileCheck-1 - Copy (118) - Copy - Copy.docx	1	
MultipleAuthors -1.docx	ł	
MultipleAuthors -2.docx	I	
MultipleAuthors.docx	1	
MultipleAuthors-3.docx	:	

Figure 12: Searching a channel with a starting string

•	Ge	neral Posts Files Notes Content	Manager 🗸 🕂				
Gen	Posts			MultipleAuthor			
	۵	Name			Files Checkin Style	Record	
	•	MultipleAuthors.docx		1			
0		MultipleAuthors-3.docx		:	Ç₹		
	<b>(</b> )	MultipleAuthors -1.docx		÷			
		MultipleAuthors -2.docx		:			
	•	MultipleAuthors.docx		÷			
		MultipleAuthors-3.docx		:			

Figure 13: Searching a channel with the starting strings

Stay	in the know. Turn on desktop notifica	ations.					Turn or					
Q. Activity	L CMAppNewScript244											
(E) Chat	Sites	🔎 Search	▽ ≣ 6, 0	(4)								
665 Teams												
	People			1								
Calendar	Check In Places	D Name			Files Checkin Style	Record						
S Calls	Check In Styles	Attachments		1. 1								
OneDrive	My Files	Content Manager Documents		1								
	∧ Search	🔘 🛅 Microsoft Teams Chat Files	D	1								
-	Favorite Records	ррт										
	Recent Documents											
+ Apps	Checked Out Docume	tearch Search		1								
		Book 1.xlsx										

Figure 14: Searching from My Files

# **Obsolete Platforms**

Refer to CM24.4\_Spec.pdf for details on the Support Matrix.

# **Obsolete Features**

No features are obsolete in Content Manager 24.4 release.