Content Manager

Software Version 24.4

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.

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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 add-ins 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.
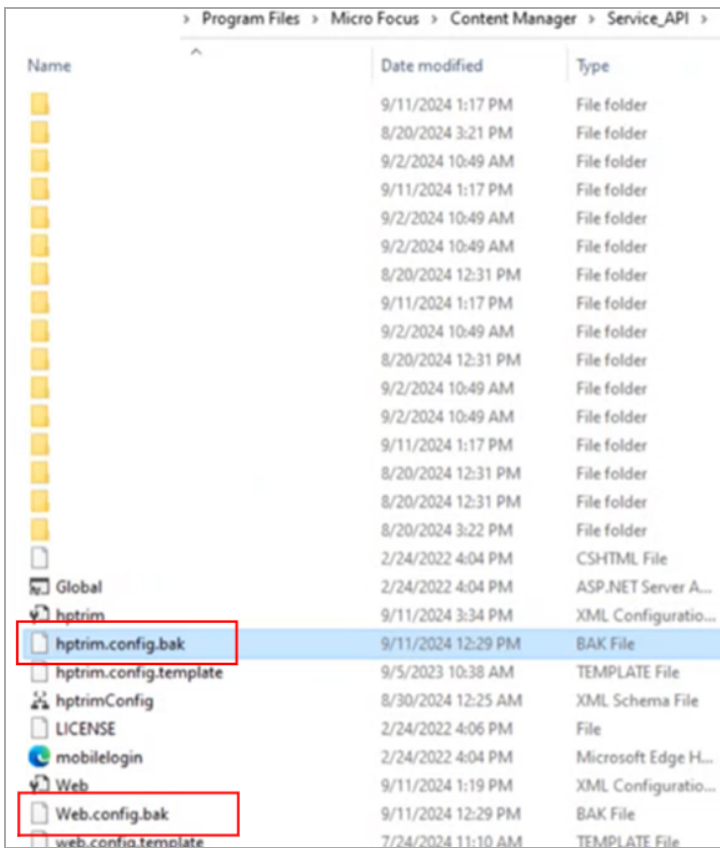
Figure 1: Backed up configuration files

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.
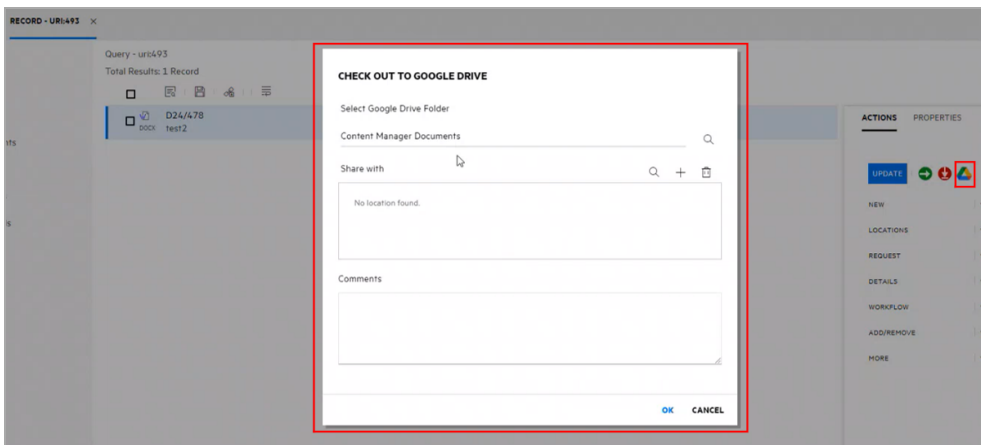
Figure 2: Check Out to GoogleDrive in Web Client
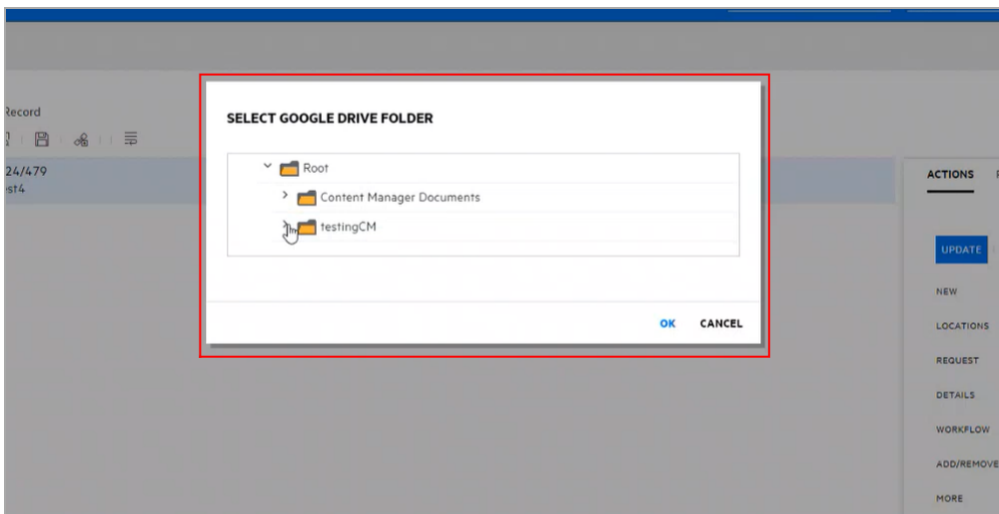
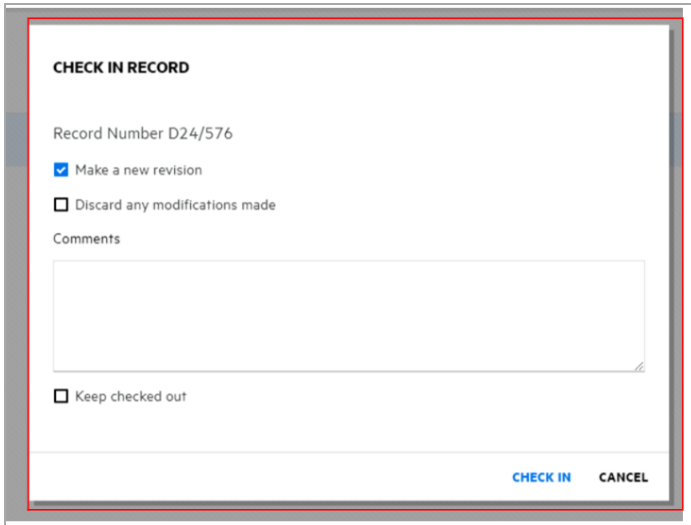**Figure 3: Check Out to a particular folder in Google Drive**

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.

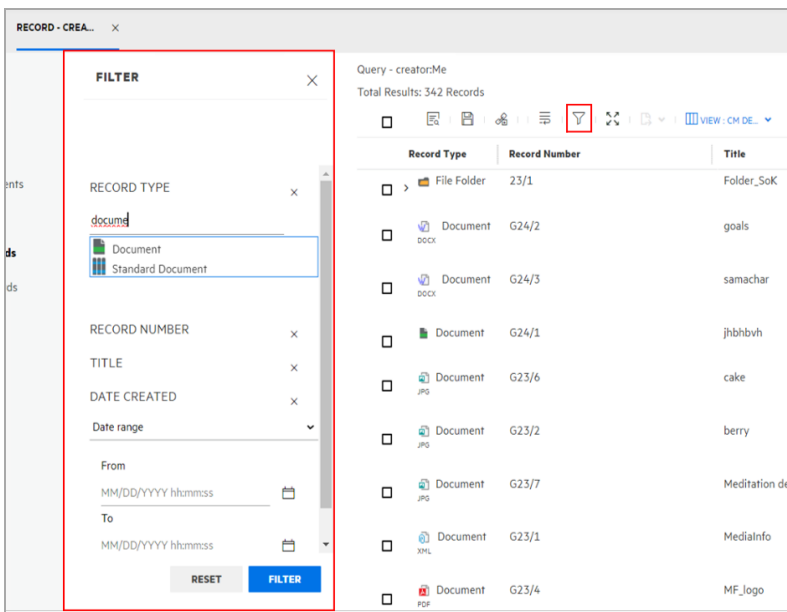If you need to apply filter based on the column that is not currently available in the view, then add the column to the view to make it available in the filter panel.

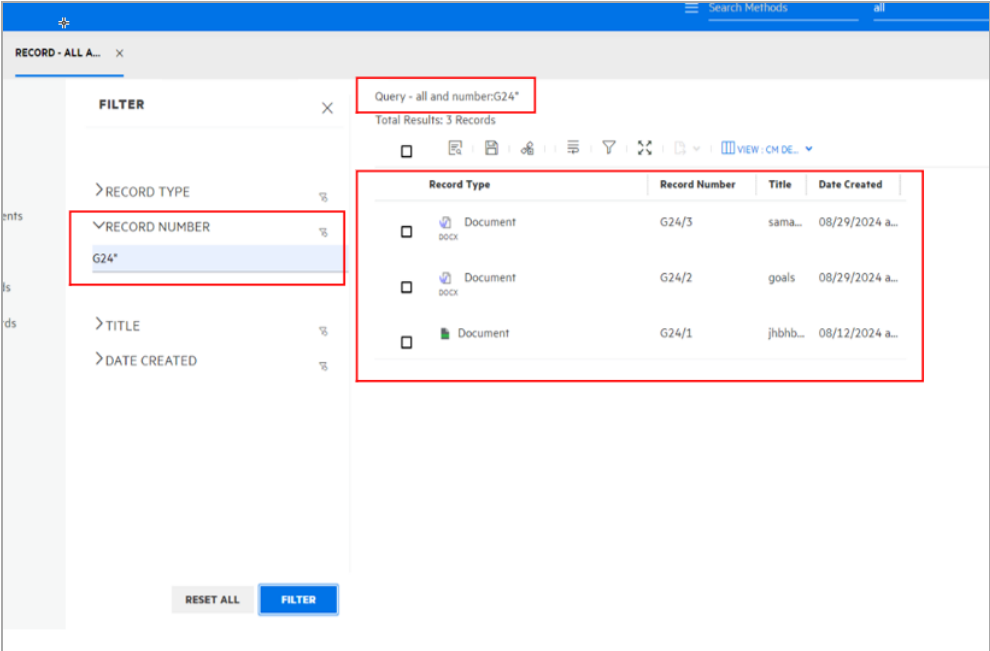**Figure 5: Filter option in Grid view**

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.

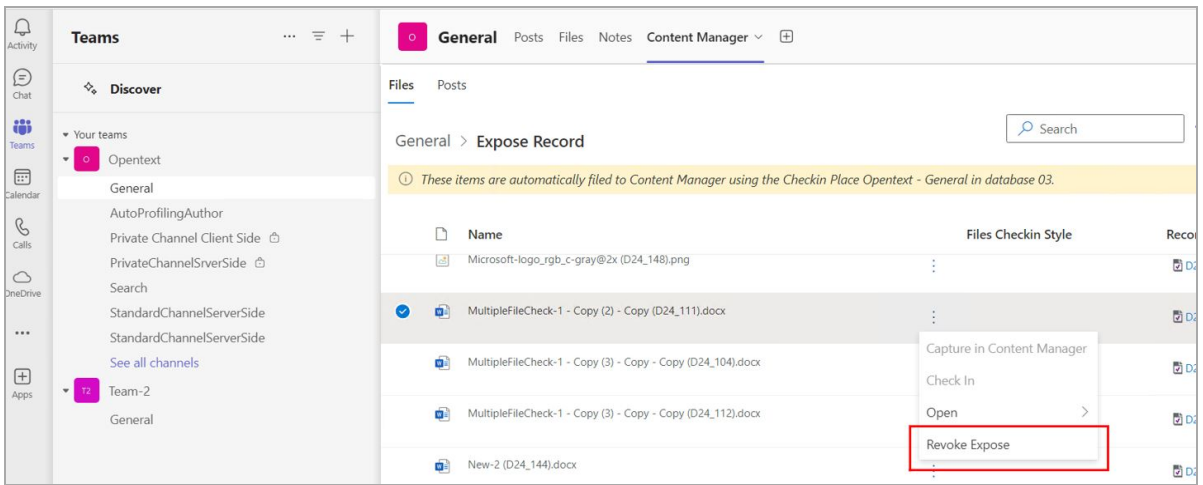For more details, see *Content Manager MS Teams Integration* help.

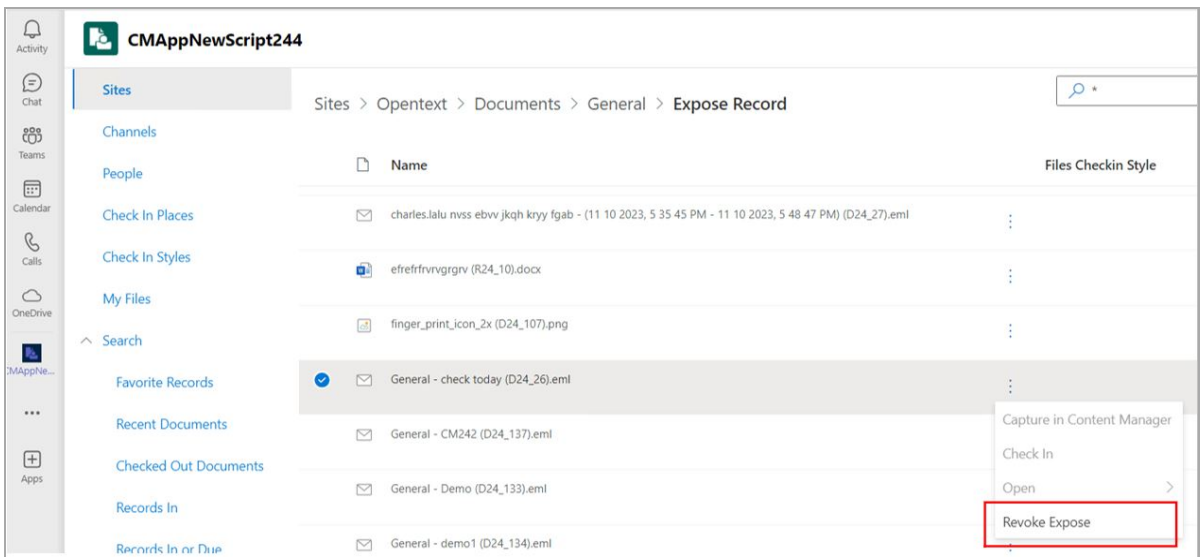**Figure 7: Revoke Expose from the Client side Content Manager tab**

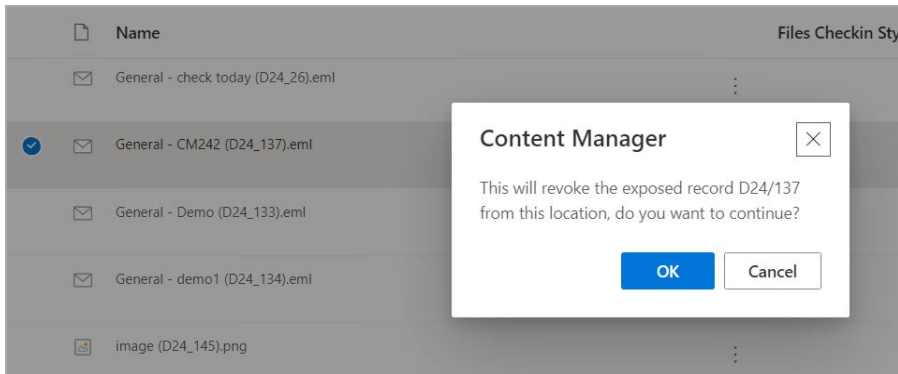**Figure 8: Revoke Expose from the Server side Content Manager App**

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**.
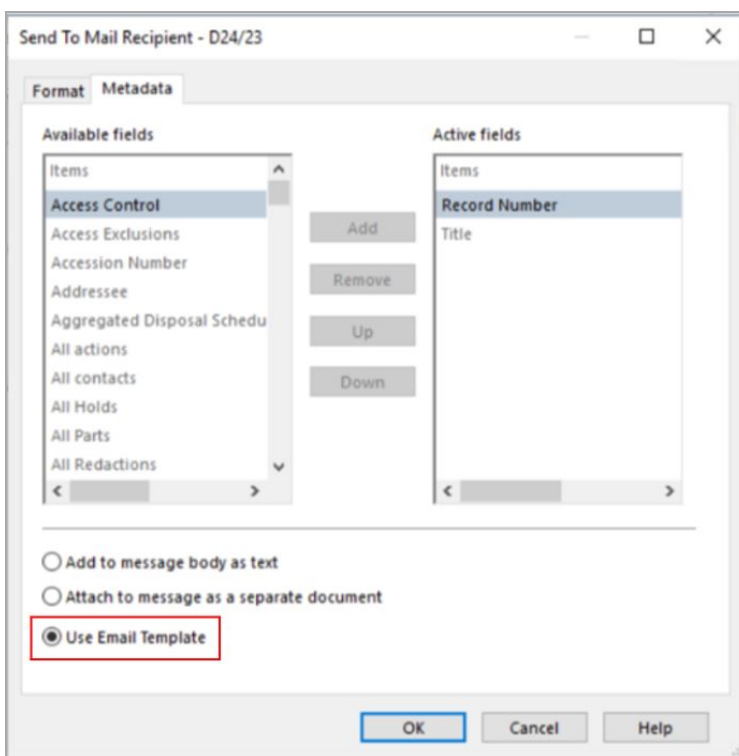

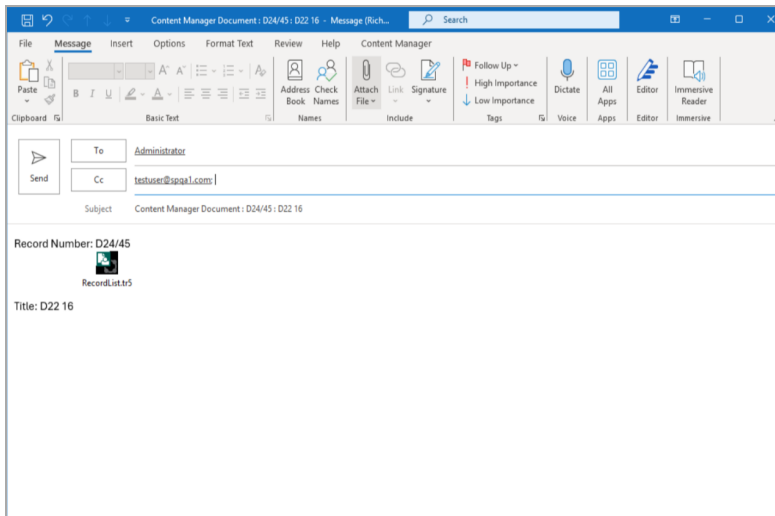**Figure 10: Use Email Template in the Metadata tab**

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.
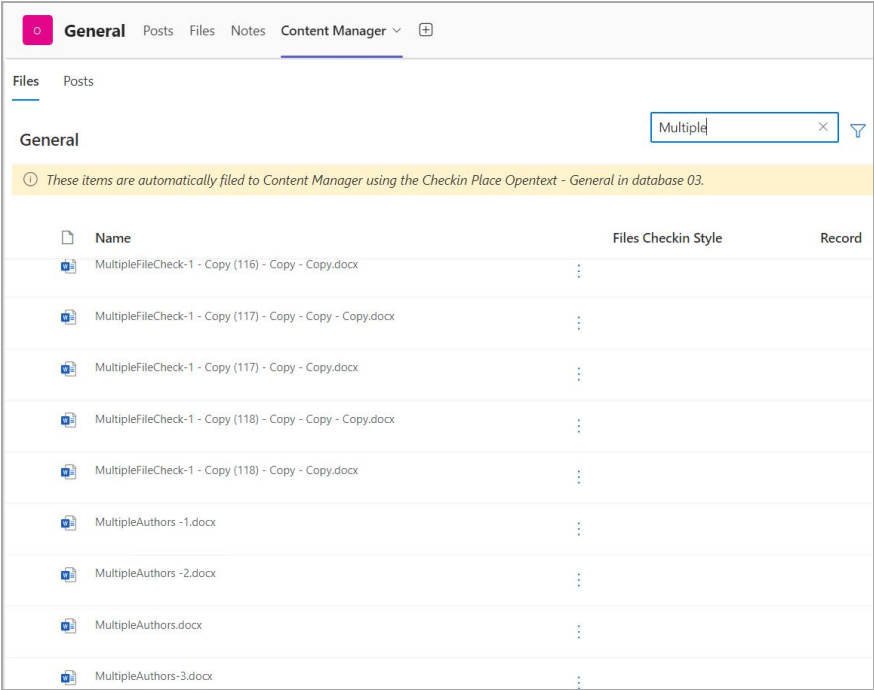
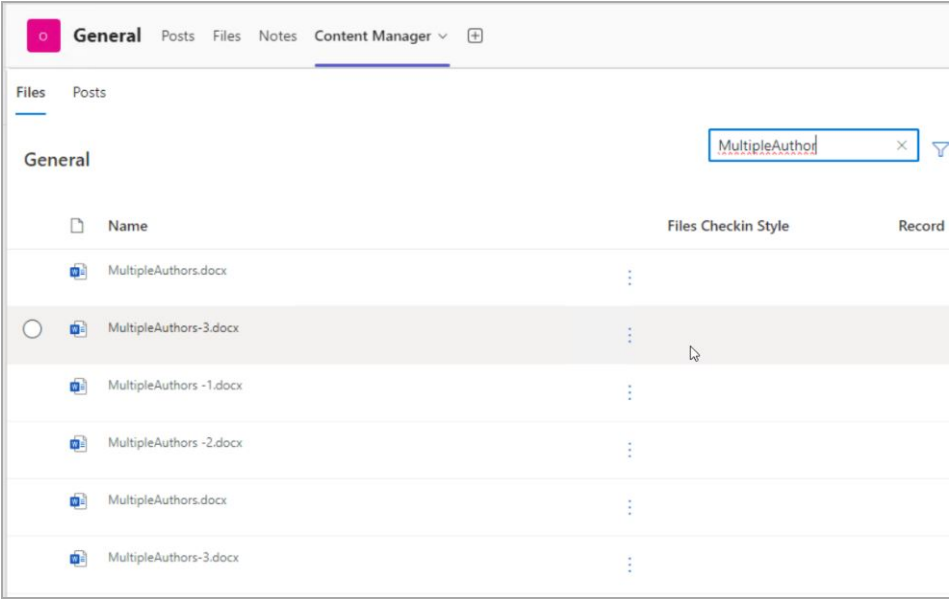**Figure 12: Searching a channel with a starting string**

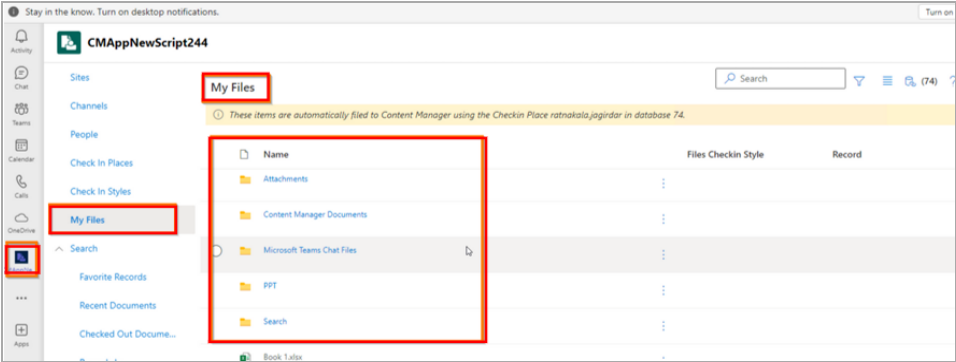**Figure 13: Searching a channel with the starting strings**

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.