



Hewlett Packard
Enterprise

HPE Content Manager

Software Version: 9.1

Release Notes

Document Release Date: November 2016

Software Release Date: November 2016

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Hewlett Packard Enterprise Content Manager Release Notes

Introduction to Hewlett Packard Enterprise Content Manager 9.1

HPE Content Manager 9.1 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. Through innovation and interoperability HPE 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, HPE Content Manager will help you address areas of cost, compliance, productivity, information privacy and security.

Developed with more than 30 years information management expertise, HPE Content Manager 9.1 is a comprehensive, out-of-the-box software solution and a key component of HPE's Information Governance portfolio. It is the fourth release that supports upgrades from legacy products, HP TRIM, Autonomy Records Manager and Meridio, using standard upgrade tools.

HPE Content Manager 9.1 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 HPE Content Manager 9.1

This first minor release includes all fixes and enhancements that were shipped in the previous releases of HPE 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) languages only.

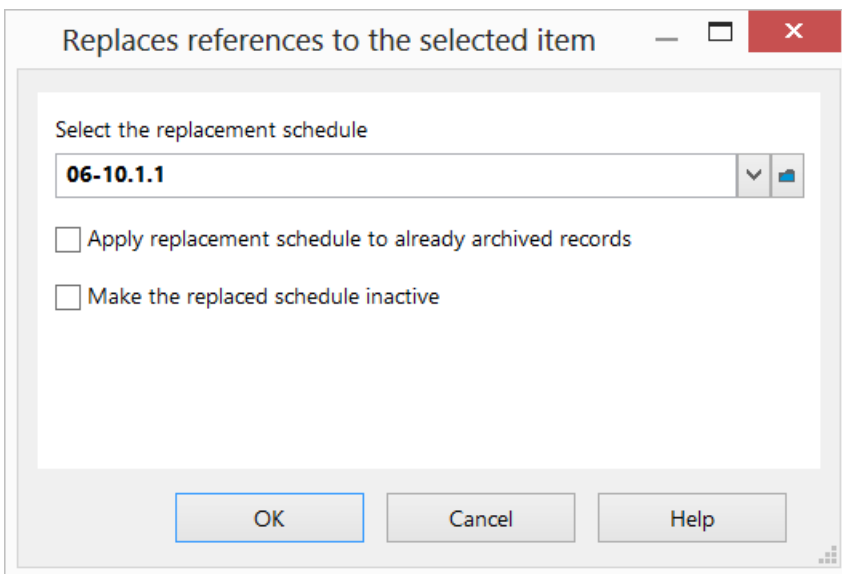
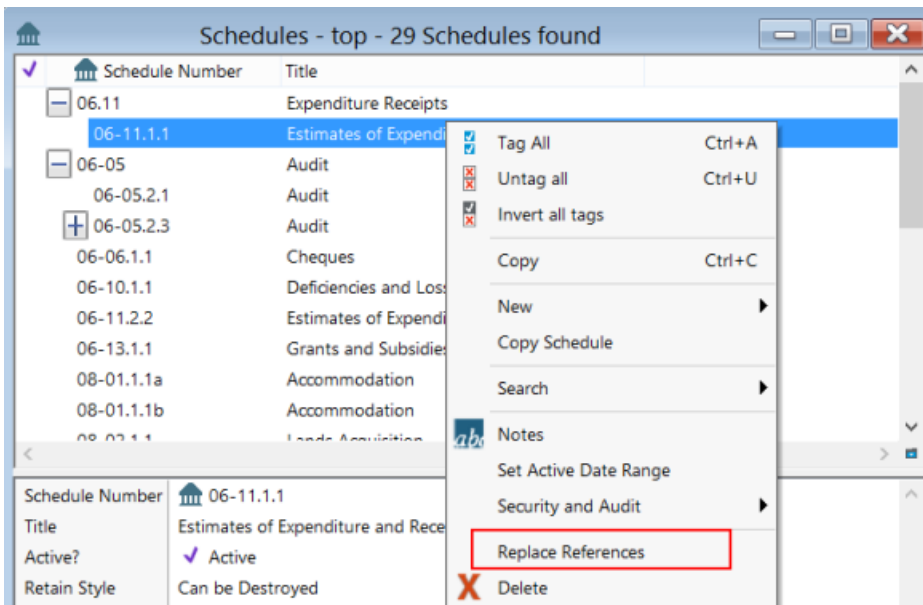
For technical details, including the support matrix, refer to **CM9.1_Spec.pdf** and **CM9.1_Install.pdf**

New Features

HPE Content Manager

Replacing a Retention Schedule

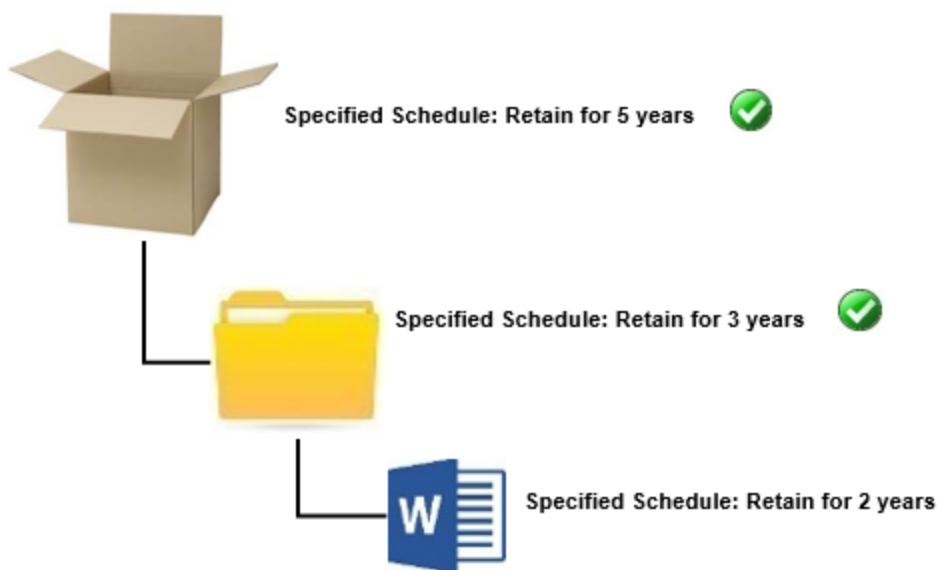
For various reasons, a Retention Schedule that is in use may need to be replaced with another Schedule. A new option, **Replace References**, now allows you to locate all references to the selected Retention Schedule, including Records, Classifications and Record Types, and replace those references with another Schedule.



Aggregated Disposal Schedules

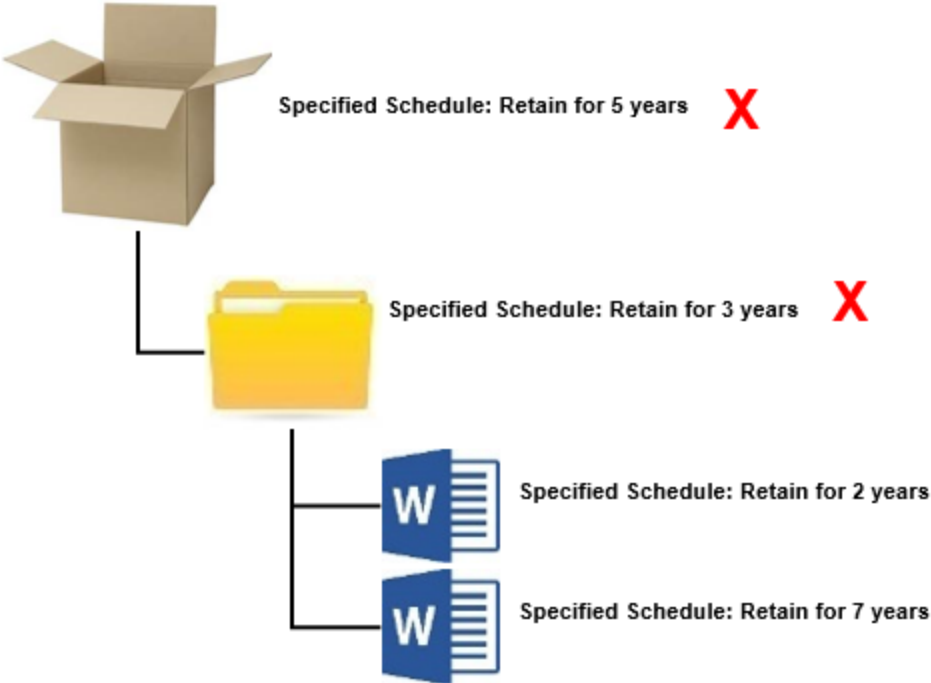
Typical practice is to set retention schedules on containers in HPE Content Manager. Where a container includes other containers or content that has Retention Schedules applied to it, provided that the schedule is more severe (i.e. longer) than the contained content, the content won't be inadvertently destroyed prior to when it is eligible to be.

In the following example, all contained content has less severe destruction dates that become due before the container. This means that destruction of the top level box in this example will not result in destruction of contained content earlier than is permissible.

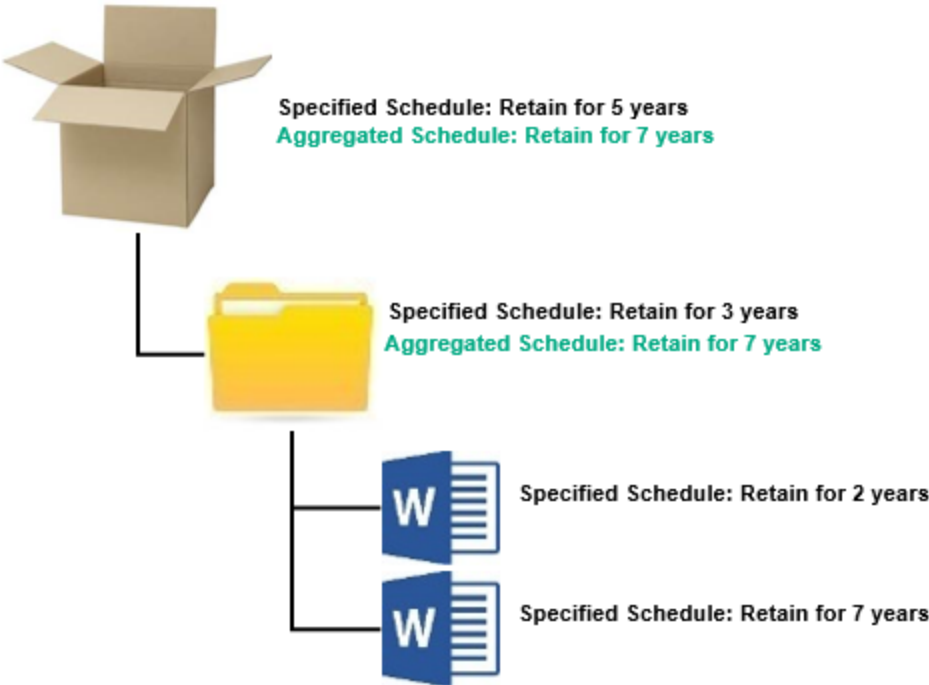


If containers include content with more severe Retention Schedules than the container itself, the destruction of the container could result in improper destruction of its content.

In the following example, if the box was destroyed after 5 years, a document that should have been retained for 7 years will be destroyed 2 years early.



An aggregated Retention Schedule is the resultant Schedule for a container taking into consideration the Schedules of the contained content. In the previous example, because the top level box contains content that must be retained for a period of 7 years, the aggregated schedule is 7 years.



The Aggregated Disposal Schedule (shown in the details pane) for the container is calculated as 7 years.

Record Number	Title	Date Inactive
D16/17	Box with 5 year retention	3/11/2016 at 11:52 AM
16/9	Folder with 3 year retention	3/11/2016 at 11:52 AM
D16/20	Destroy after 7 years	3/11/2016 at 12:22 PM
D16/18	Destroy after 2 years	3/11/2016 at 12:08 PM

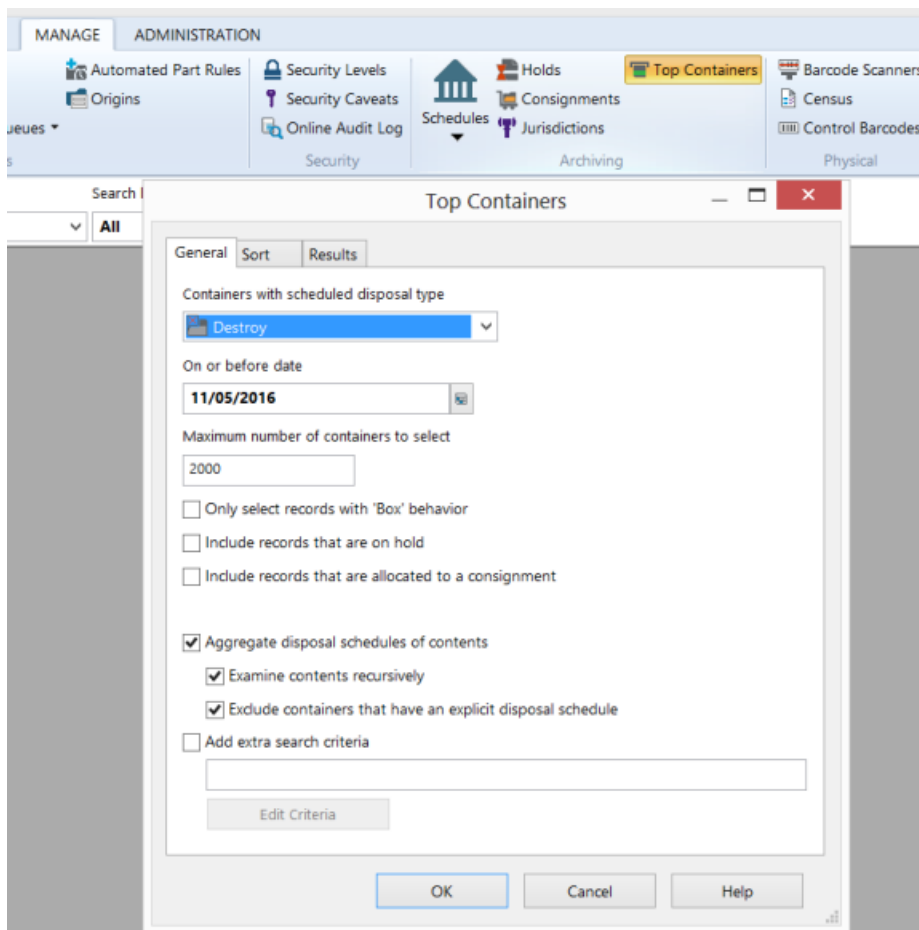
Record Number	16/9
Unique Identifier	34507
Title	Folder with 3 year retention
Date Created	Thursday, 3 November 2016 at 11:45 AM
Date Registered	Thursday, 3 November 2016 at 11:45 AM
Assignee	In container 'D16/17 [At home: Jaimie Tilbrook]' since Thursday, 3 November 2016 at 11:45 AM
Latest Part	16/9
Retention schedule	2 Destroy after 3 years Action Summary: Destroy 3 years after Date Inactive
Aggregated Disposal Schedule	Based on contents: Destroy: Friday, 3 November 2023 (Note: container has an earlier disposal date of Sunday, 3 November 2019).

Similarly, the Aggregated Disposal Schedule for the box is also calculated as 7 years.

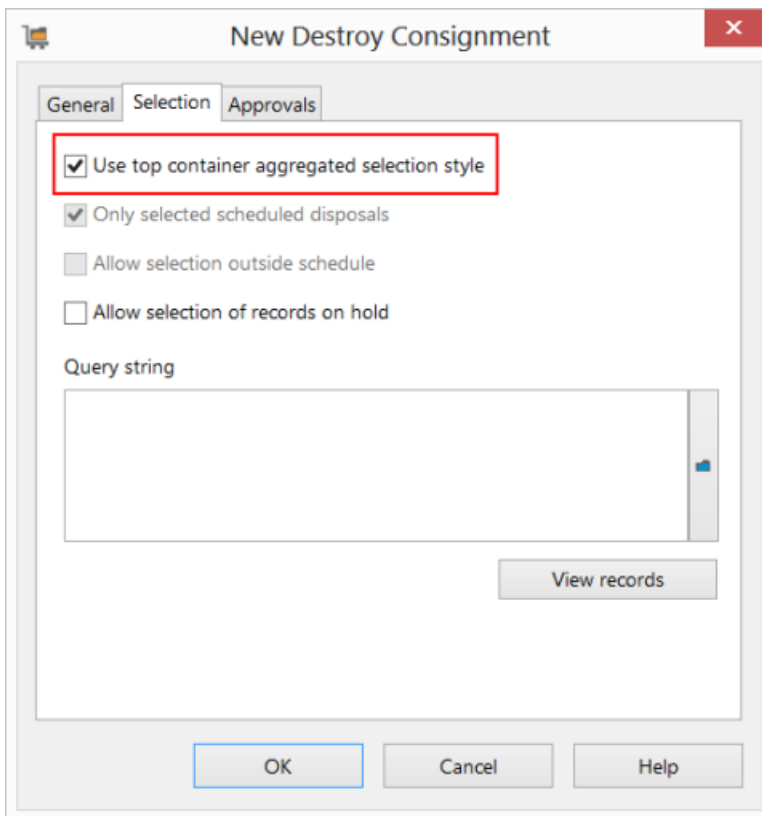
Record Number	Title	Date Inactive
D16/17	Box with 5 year retention	3/11/2016 at 11:52 AM
16/9	Folder with 3 year retention	3/11/2016 at 11:52 AM
D16/20	Destroy after 7 years	3/11/2016 at 12:22 PM
D16/18	Destroy after 2 years	3/11/2016 at 12:08 PM

Record Number	D16/17
Title	Box with 5 year retention
Date Created	Thursday, 3 November 2016 at 11:44 AM
Date Registered	Thursday, 3 November 2016 at 11:44 AM
Assignee	At home: Jaimie Tilbrook since Thursday, 3 November 2016 at 11:44 AM
Edit Status	Record has no document attached.
Revision Number	0
Document Details	Record has no document attached.
Retention schedule	1 Destroy after 5 years Action Summary: Destroy 5 years after Date Inactive
Aggregated Disposal Schedule	Based on contents: Destroy: Friday, 3 November 2023 (Note: container has an earlier disposal date of Wednesday, 3 November 2021).

A new option, **Top Containers**, can be found on the **Manage** ribbon, in the **Archiving** group. This option allows the execution of a search for records due for destruction based on the Aggregated Disposal Schedule rather than the specified Schedule.



When defining Consignments, it is possible to elect to use the aggregated schedule style when selecting records for the Consignment.



New Platform Support

Support for Microsoft's SQL Server 2016 is included in this release.

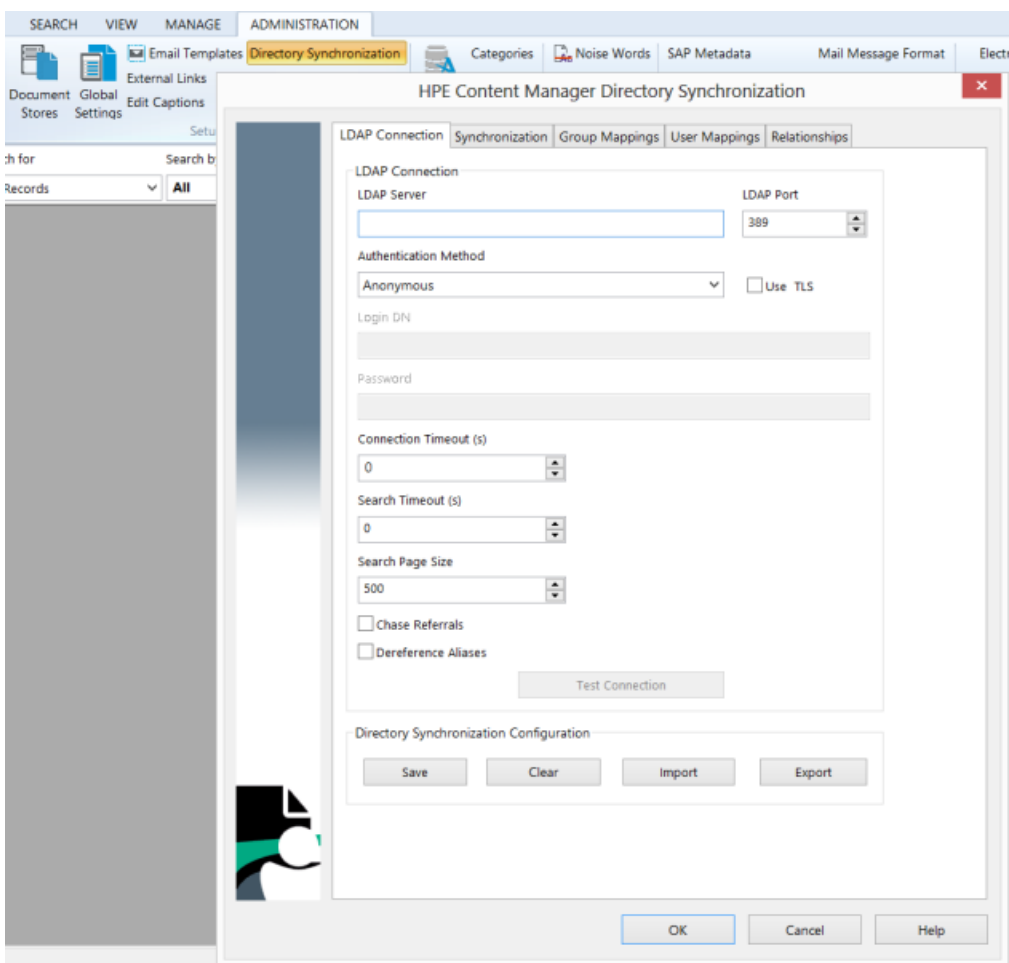
Directory Synchronization

The ability to synchronize locations with Active Directory (AD) has been added to HPE Content Manager. This feature includes the ability to:

- Automatically create users based on AD attributes
- Set the location attributes such as name, user type and security level based on the attributes of the user in AD
- Creation of groups based on AD groups
- Population of groups based on AD groups
- The ability to define granularly what is synchronized from AD
- Deactivation of locations when the user is deactivated in AD
- Updating attributes of locations when an AD user or group changes
- Manual or scheduled synchronization

This functionality is designed to be flexible enough to accommodate the requirements of all organizations regardless of the disparity of the AD implementation and structure.

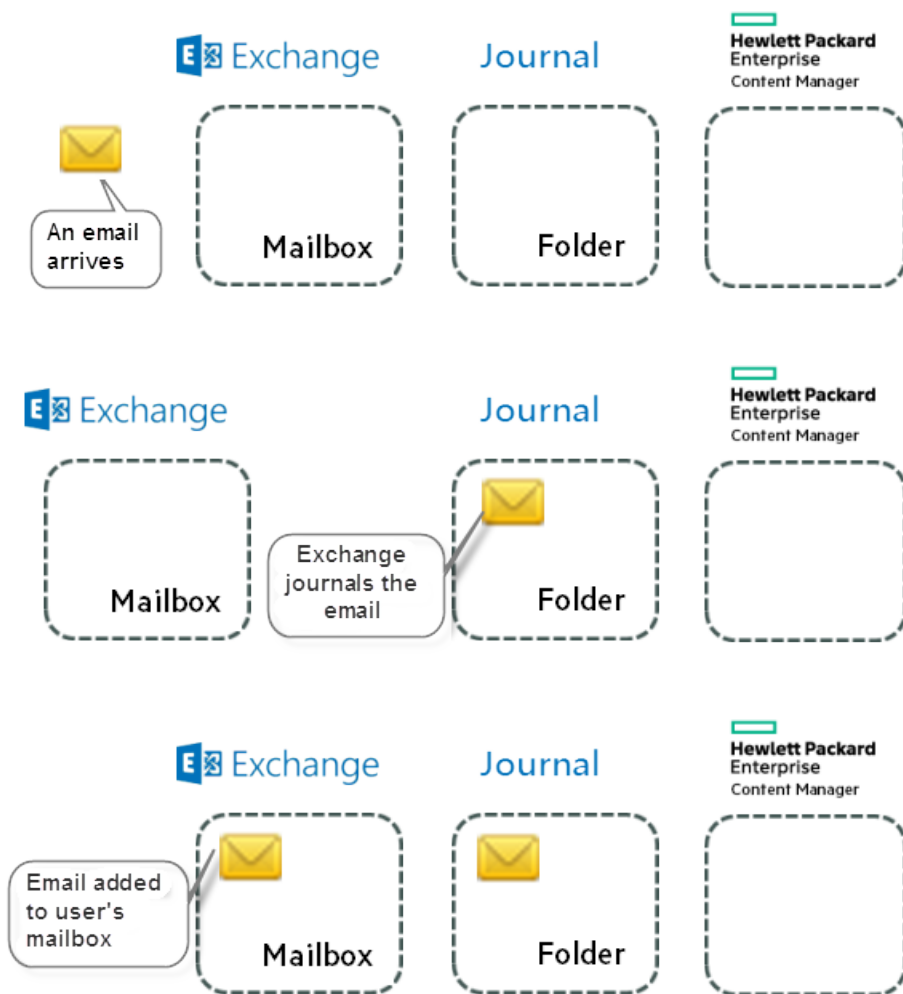
Directory Synchronization is accessed from the **Administration** ribbon, **Setup** group.

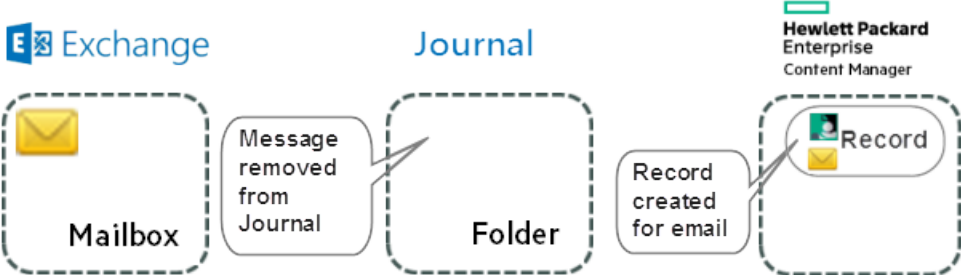


Capstone Email Management

By the end of 2016, United States of America Federal Government agencies are required to implement a strategy for the management of emails. A widely adopted recommendation made by National Archives and Records Administration US (NARA) for satisfying this requirement is known as **Capstone**.

HPE Content Manager 9.1 provides a solution to email management that allows implementing the core of the Capstone requirements. The process can be summarized as follows:





The solution does not include the implementation of journaling, only the ability to consume the output of journaling.

HPE Content Manager Web Client


Improved Support for GPS Locations

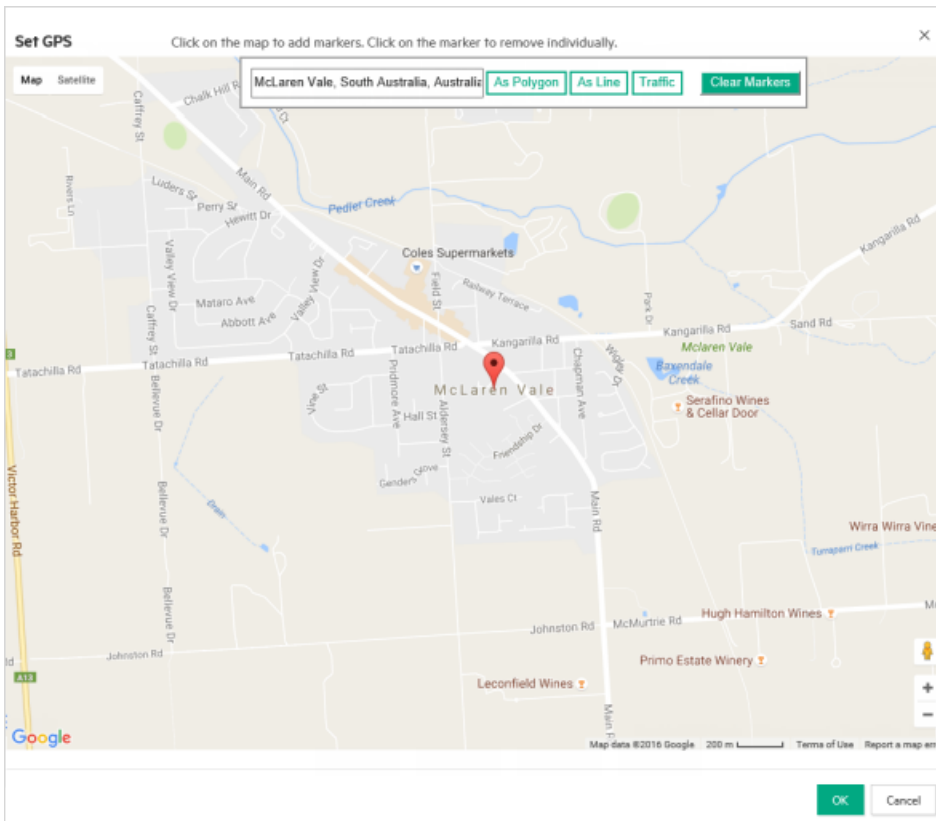
GPS Location information for Records and Locations can be selected, modified and viewed using the Web Client.

When the Record or Location Entry Form includes a GPS Location type field, the GPS Location can be selected from a map. GPS Location information can also be added to individual or multiple Locations and Records using the **Details - Set GPS Location** option.

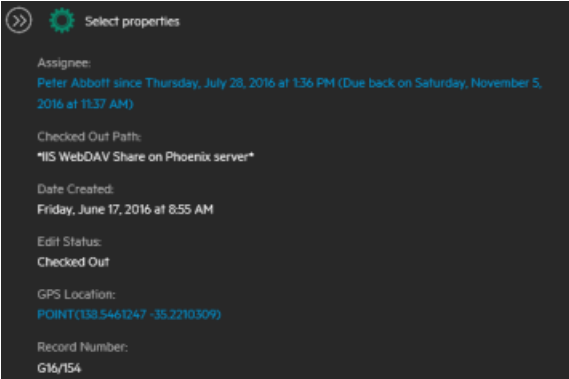
Set GPS Location

GPS Location

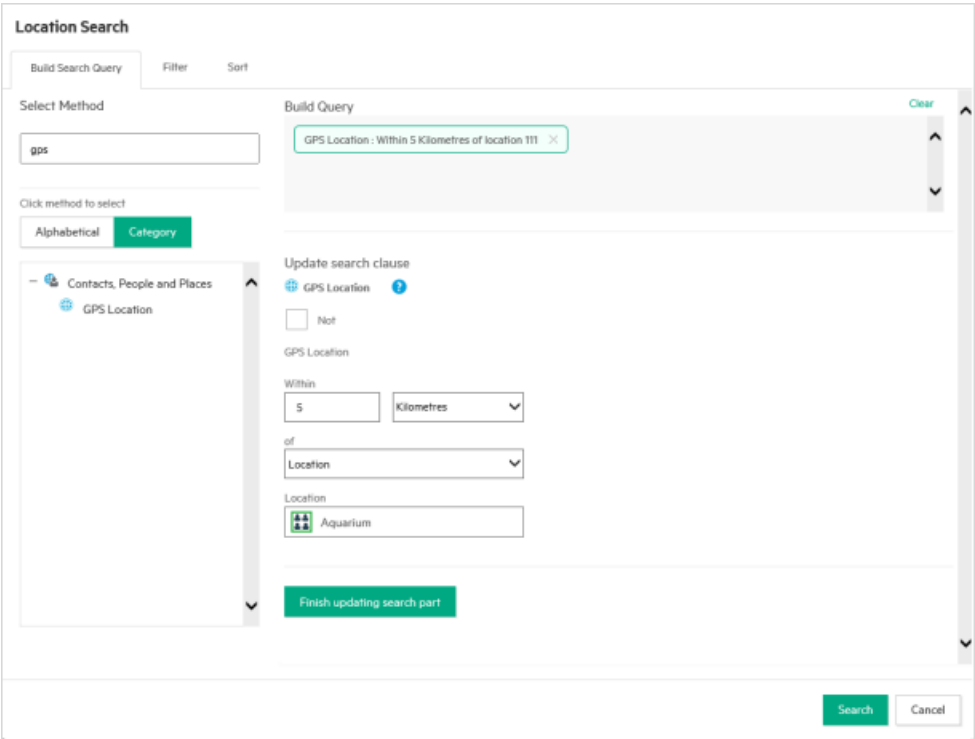




The GPS Location fields can be added as properties to the Properties panel. This property allows users to directly view the GPS Location of the record or location on a map directly from the Properties panel using the linked data.

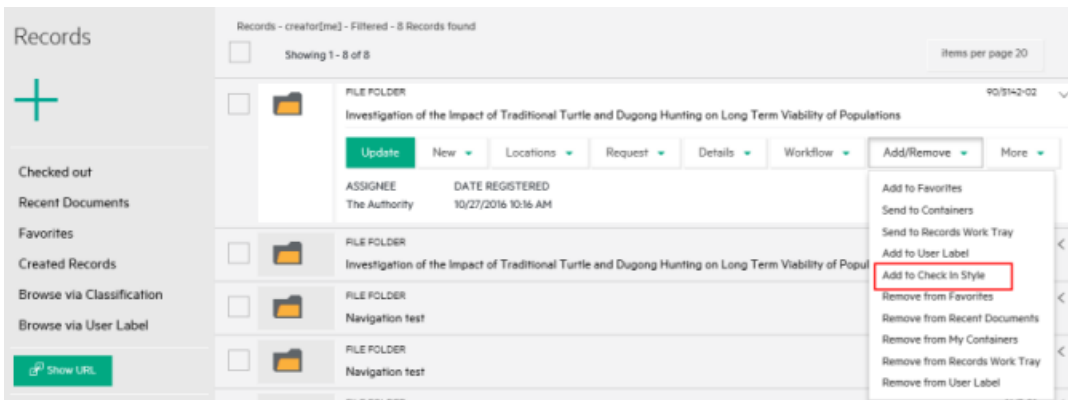


The Record and Location Search Editors both support search clauses based on proximity to a GPS Location, Record or Location.



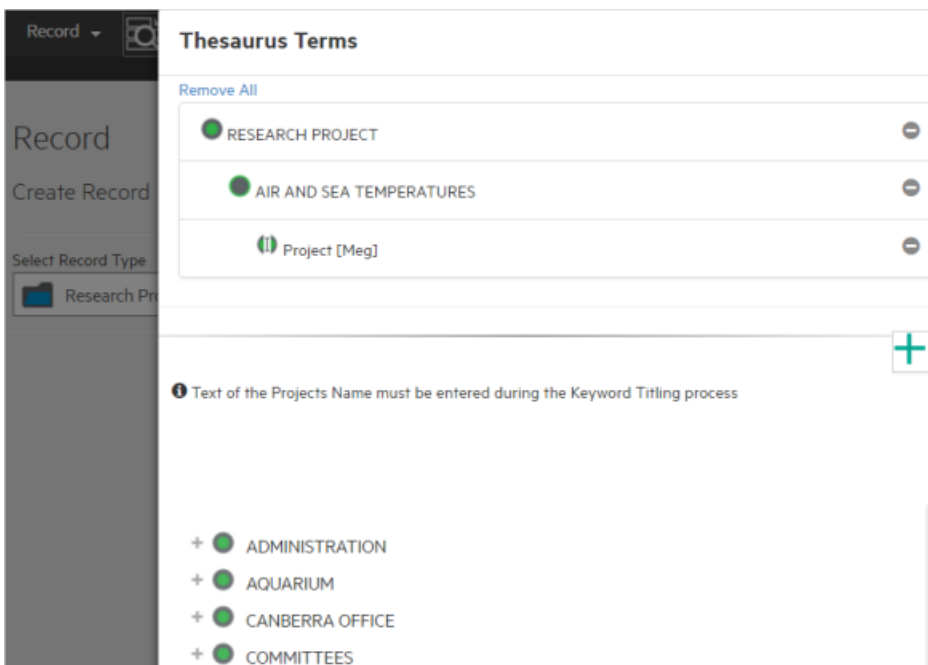
Create a Check In Style from a Container

A Check In Style can be created based on a selected container record. This option is available in the **Add/Remove** menu on the Records panel.



Support for Creation of Records using Thesaurus Titling

Records can now be created, using Record Types that have "Thesaurus Term - ISO" or "Thesaurus Term - Descriptor" as their structured Titling Methods.

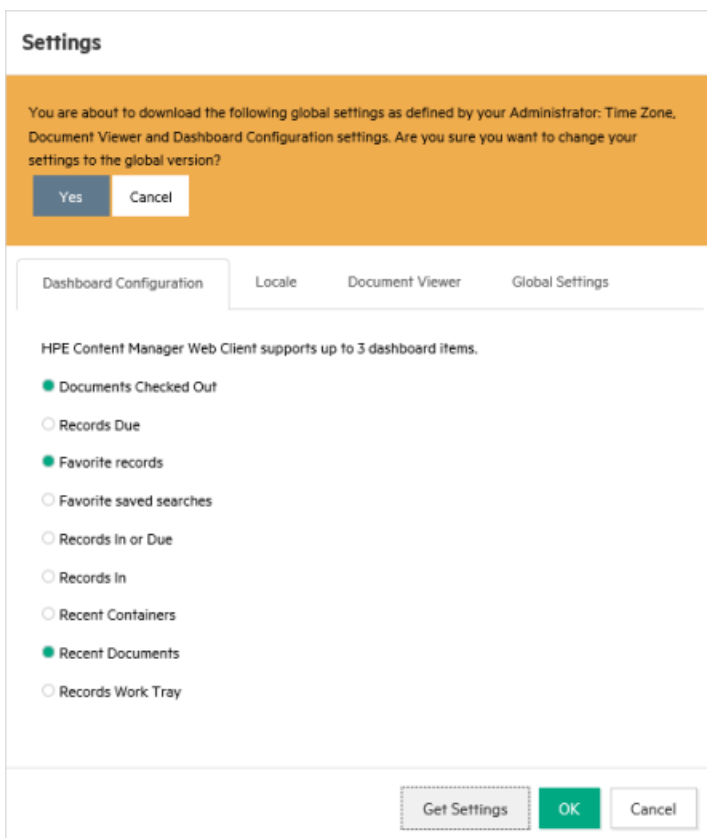
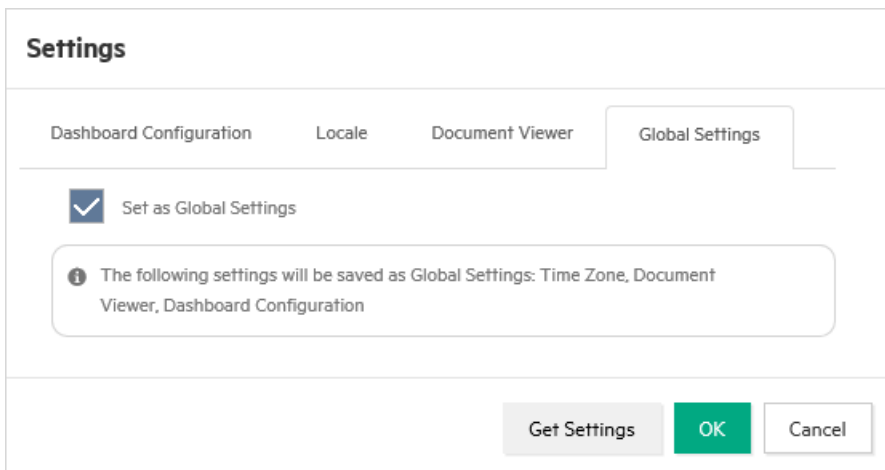


Set and Get Global Settings

Users with appropriate permissions can now set specific HPE Content Manager Web Client Settings as Global Settings, and users can download these settings.

The Settings that are saved and can be downloaded are:

- **Dashboard Configuration** tab options
- **Locale** tab - **Time Zone** setting
- **Document Viewer** tab - **Bypass the HPE Content Manager View for these File Types** and **Use the Trapeze Viewer for the File Types** settings



HPE Content Manager SharePoint Governance and Compliance

Support for Service Based Implementations

Previous versions of the SharePoint Governance and Compliance app required unique Internet Information Services (IIS) sites and separate customer configuration databases for each customer.



This provided a challenge for organizations looking to provide SharePoint compliance as a service. Adding additional servers required configuring that new server to support each customer site. Additionally, when new customers were added, a site needed to be created on each machine in the farm.

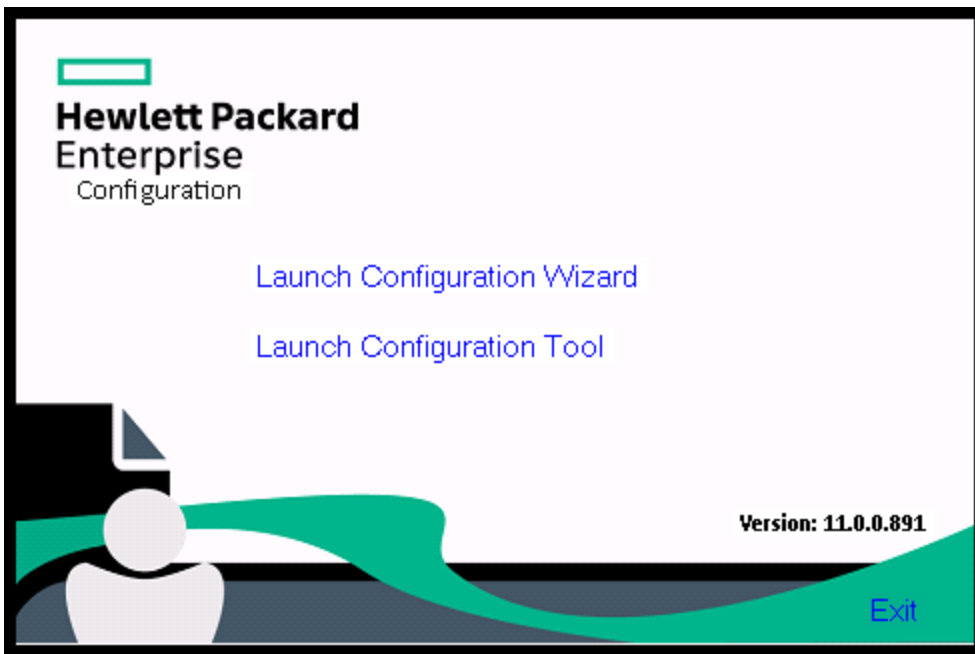


From HPE Content Manager 9.1, a single IIS site and configuration database is required. Adding additional servers to the farm does not require additional configuration. As new customers are added, they are simply registered in the configuration database.

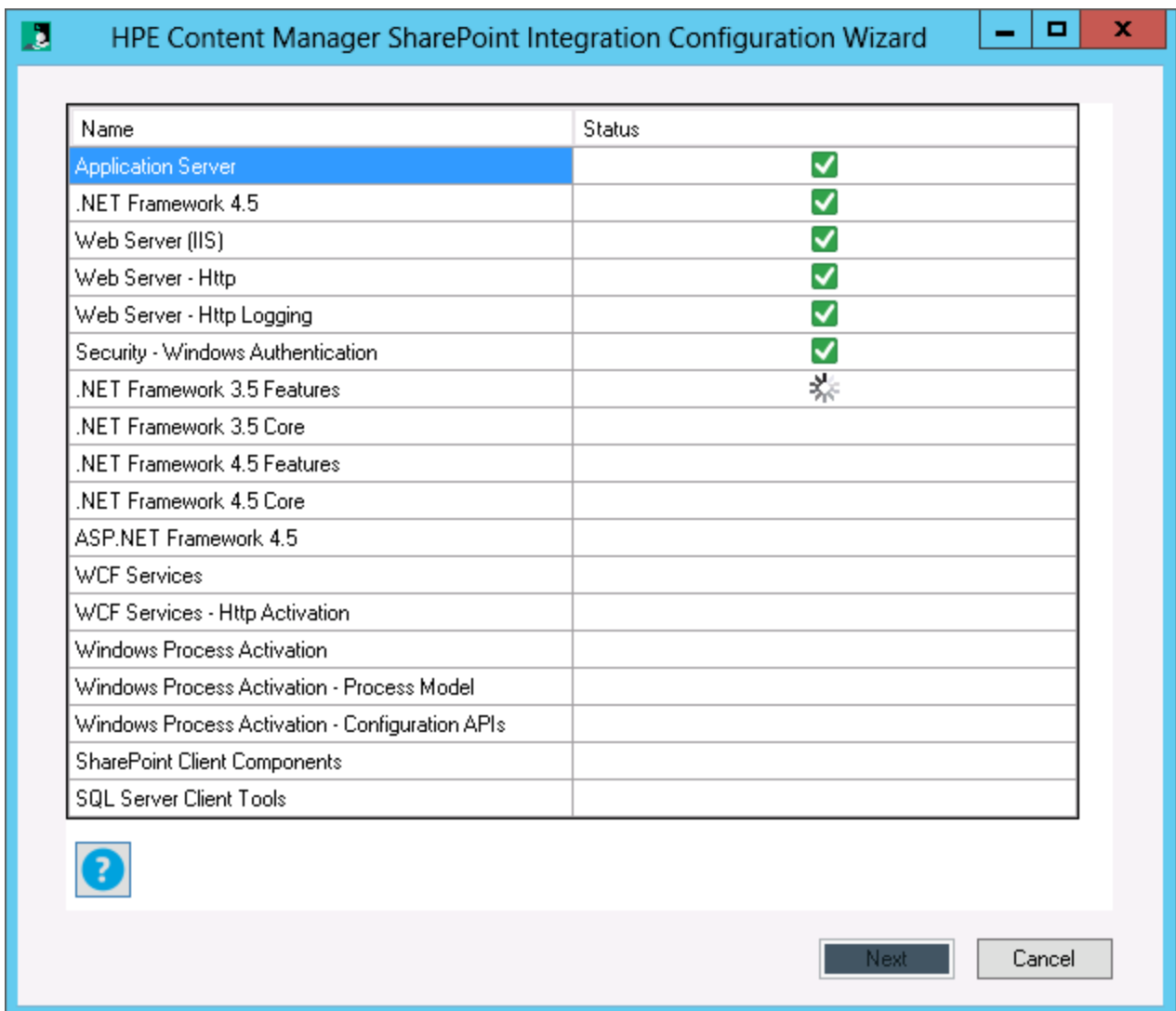


Installation wizard

An installation wizard is now available from the welcome screen of the configuration tool.



This wizard guides you through the installation and setup process, performing most tasks for you thereby reducing the possibility of configuration errors.

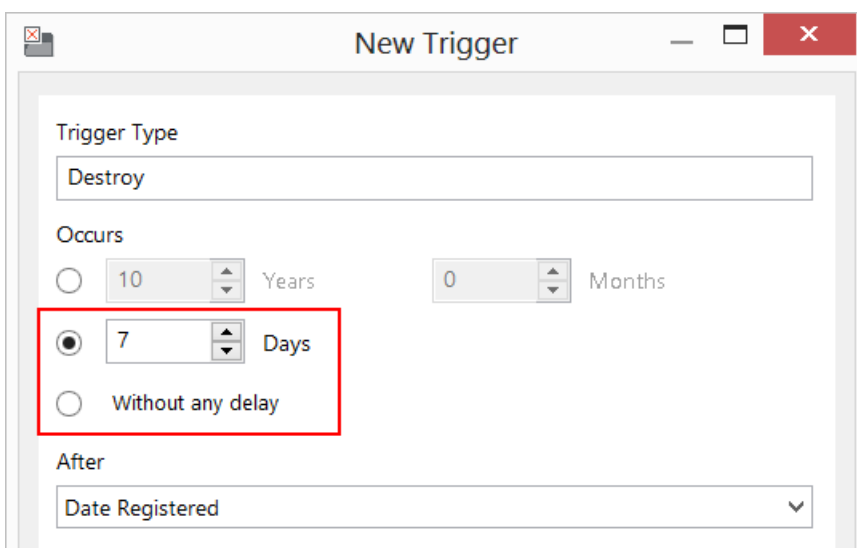


Enhanced Features

HPE Content Manager

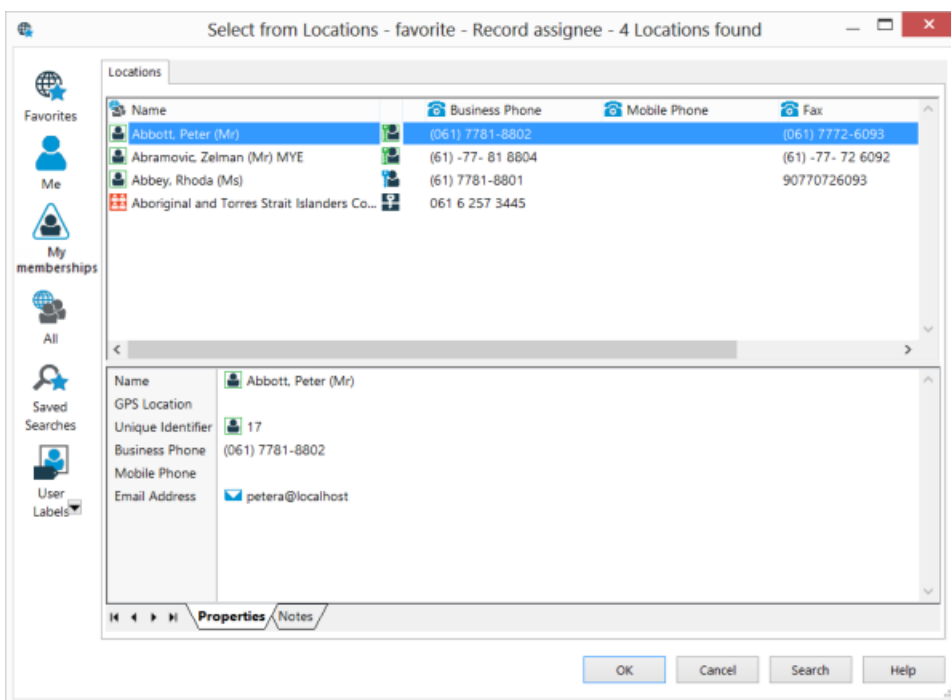
Support for day based triggers

Retention Schedules now support the creation of Triggers based on period of time defined in Days, as well as a **Without any delay** option.



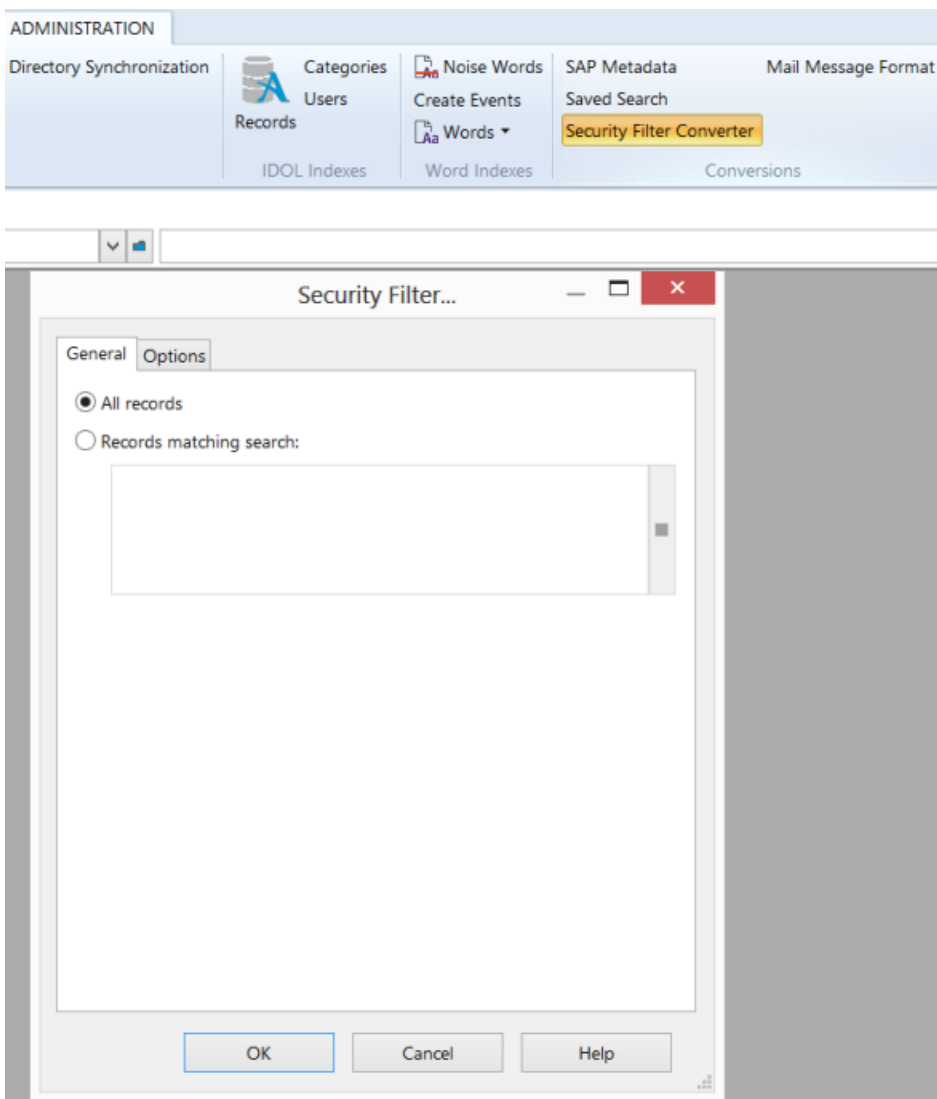
Improvements to Location Searching

When selecting a location during the creation or modification of a record, the **Select from Locations** dialog presented has been enhanced to include shortcuts to common Location trays. This design improves the ability to quickly locate the correct location to be used.



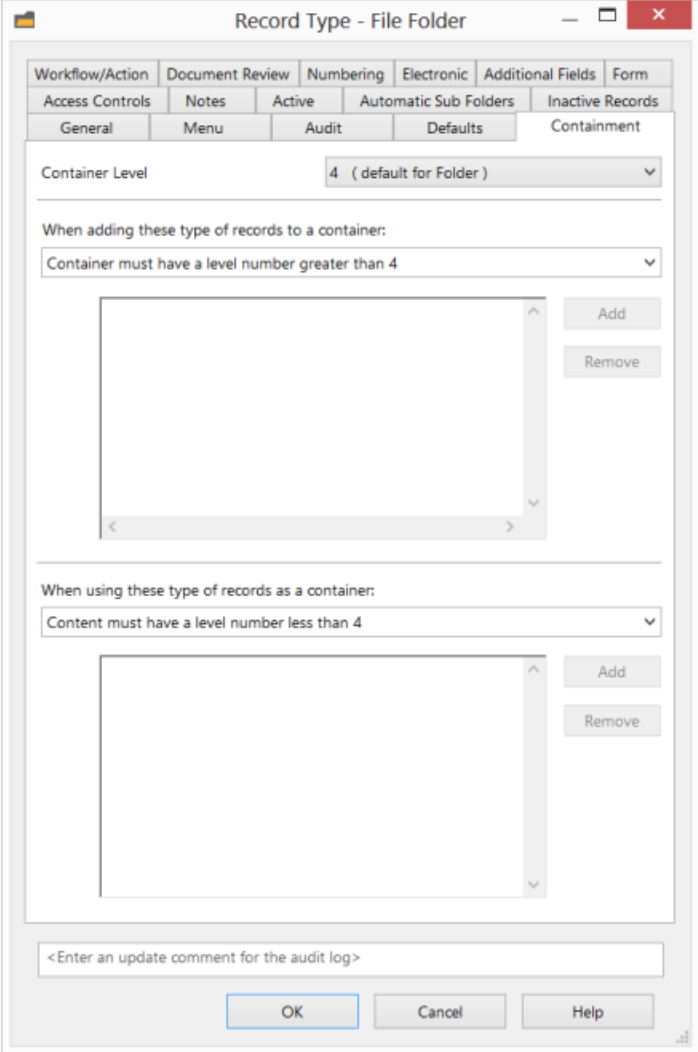
Security Filter Converter

Access control security filtering in HPE Content Manager 9.1 has been optimized to improve performance. As part of this optimization, all discrete groups that have been designated in an access control are set up in a special “access control group” object. These access control groups are only ever used “under the hood”, however the process used to convert the HPE Content Manager database to set these group can take a long time to complete. For this reason, the data conversion was removed from the normal schema upgrade program so that it can be run separately and concurrently with users accessing HPE Content Manager. Only when the conversion is complete and all groups have been verified will HPE Content Manager start using the new security filtering model. The Security Filter Converter is accessed via the HPE Content Manager client, on the **Administration** ribbon, in the **Conversions** group.



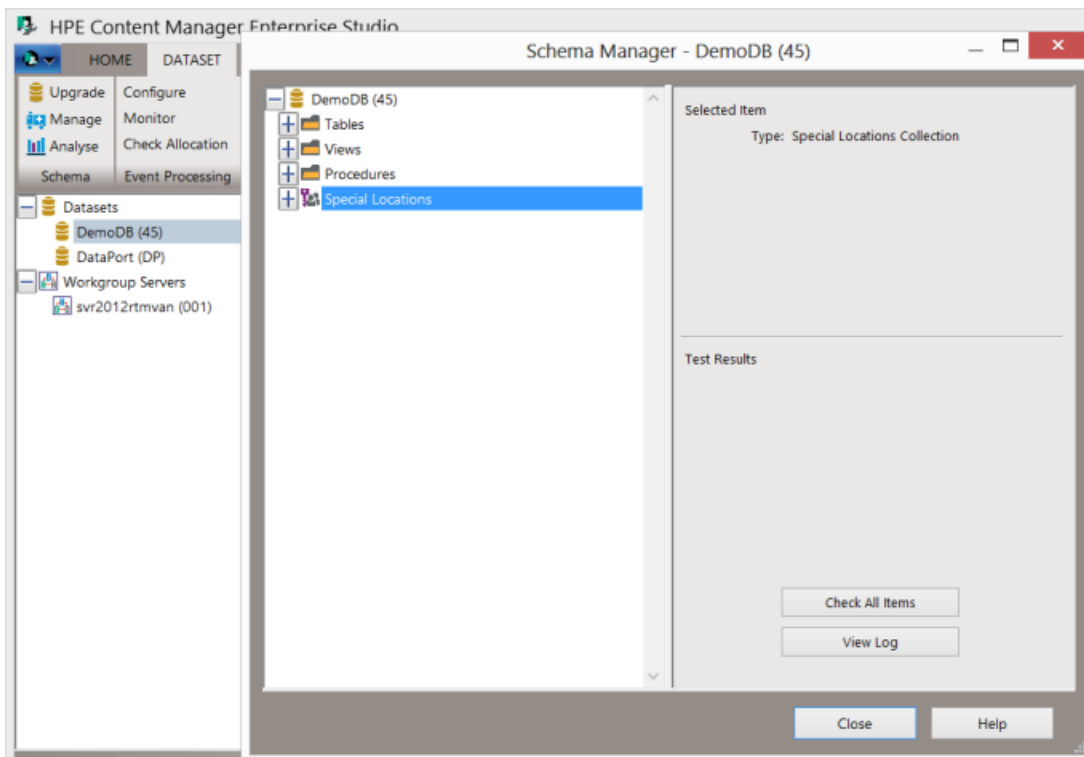
Improvements to Record Type Containment options

The Record Type **Containment** tab enables you to determine how containers will operate in HPE Content Manager. Typically, boxes contain folders and folders contain documents. The new options allow you to create containment rules that are flexible, such as a top level paper only folder that has lower sub-folders which allow for electronic documents, depending on selected Record Types.

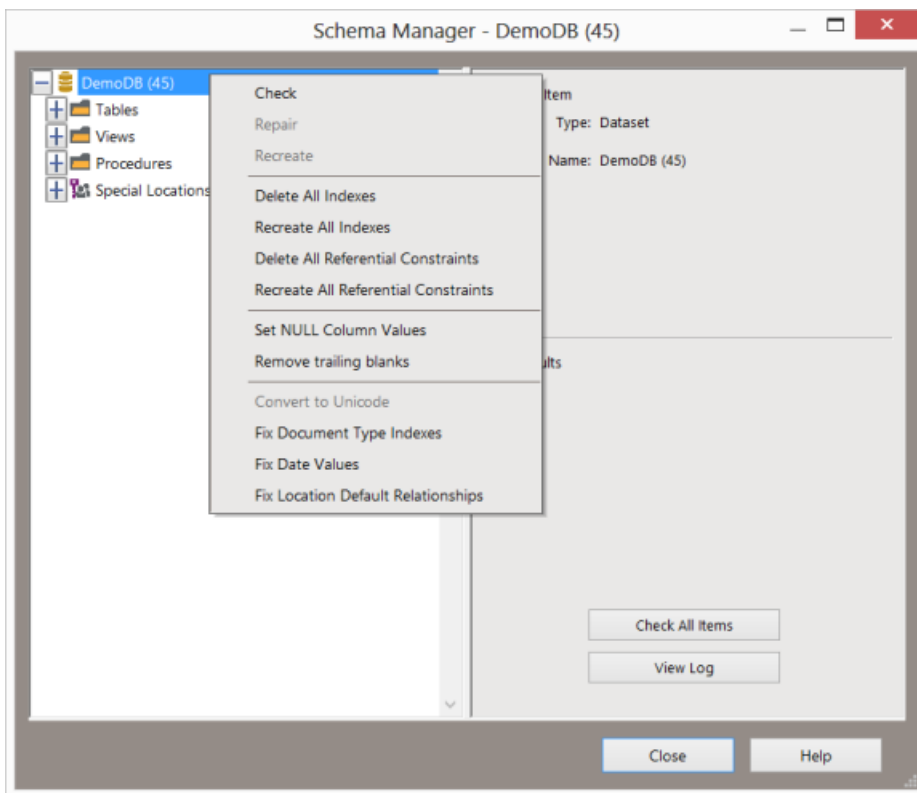


Schema Management Improvements

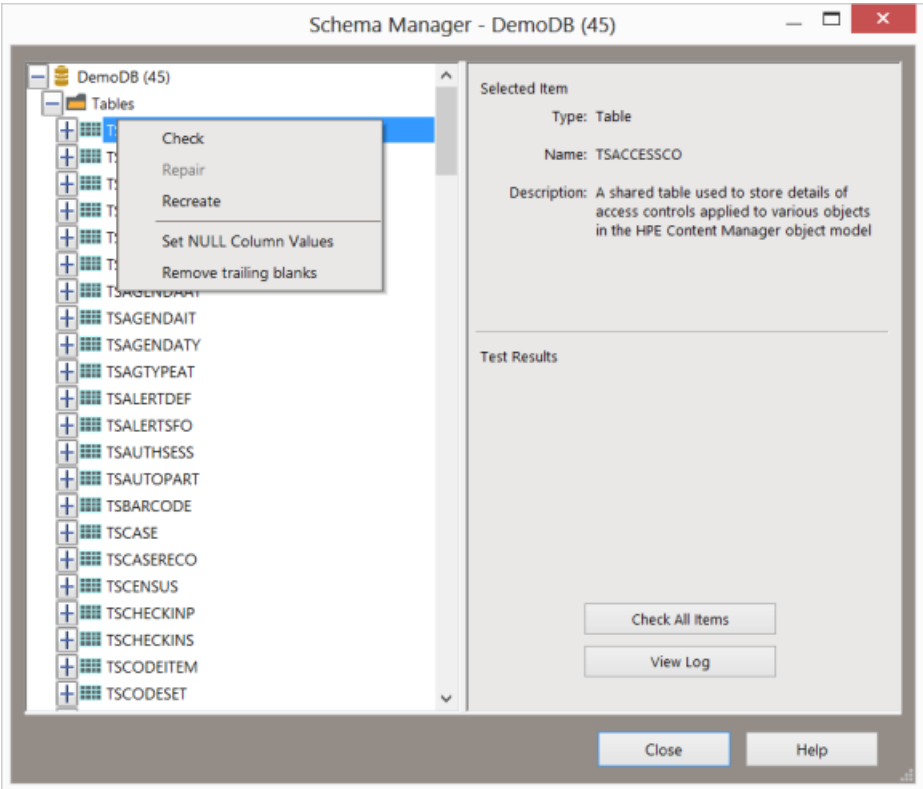
The Dataset Schema Manager tool has been enhanced to include a number of new features. All database objects can be examined in the Schema Manager.



For each dataset, it is possible to perform a number of database activities directly from the Schema Manager.



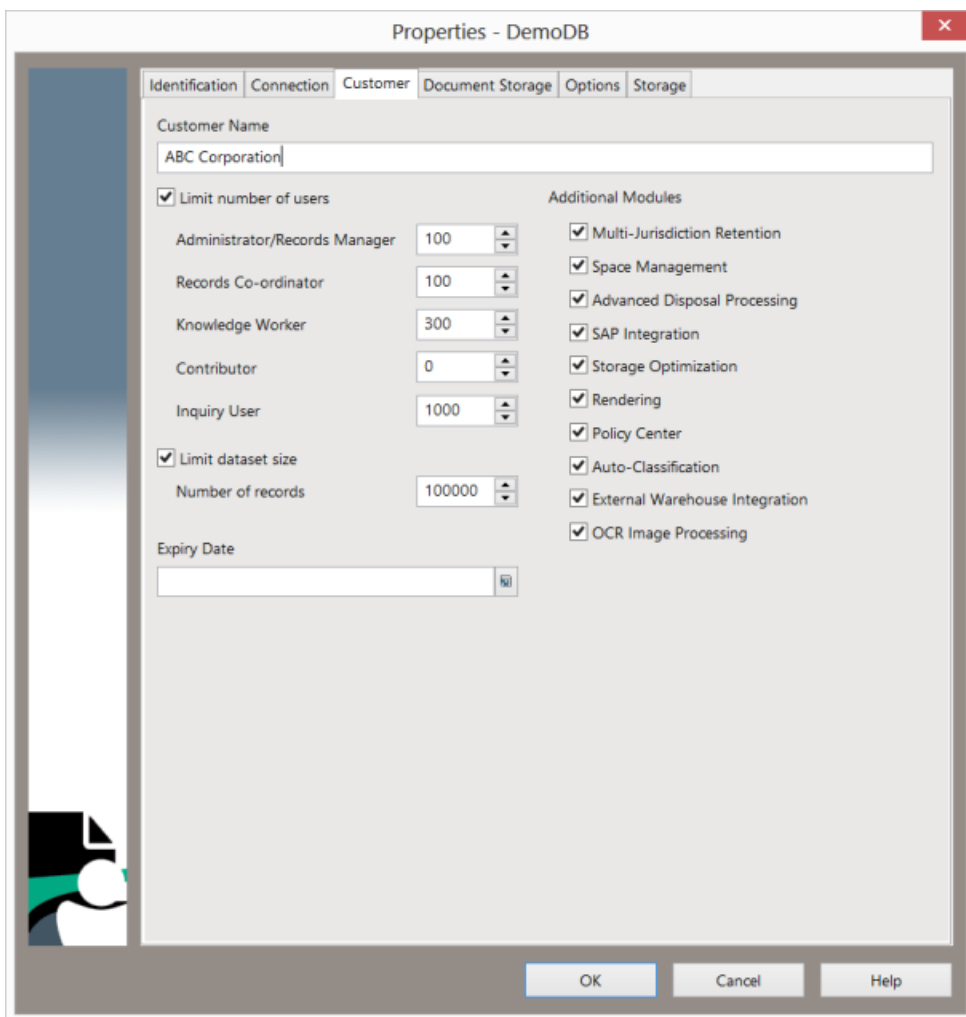
For each object, including tables, stored procedures and views, it is possible to perform a check of the object or even to recreate it entirely.



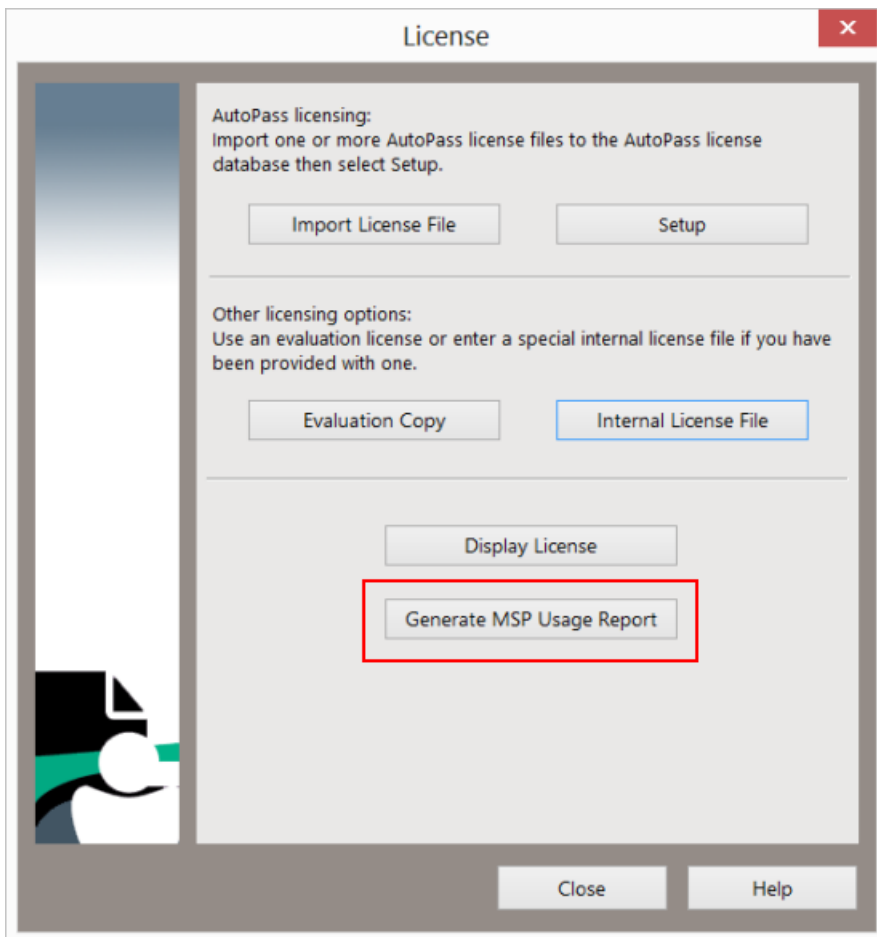
Changes to Managed Service Provider (MSP) Licensing

When a Managed Service Provider (MSP) license is used, on the **Dataset Properties - Customer** tab, it is now possible to specify for each dataset:

- The number of each user type that can be consumed (0 for unlimited)
- The maximum number of records
- The additional modules that are available for use



MSP billing is based on the usage across all datasets. An MSP Usage Report tool has been included on the License dialog. This produces a report calculating the usage of each user type, number of records used and number of datasets using each module, across all datasets in use.



HPE Content Manager Web Client

Make Final options

Additional options have been added to the Make Final dialog. Users can now finalize and remove any previous Revisions, and, if they have the correct user permissions, revert a finalized document to be a Draft/Working document.

Make Final

Make Final

Final and remove any previous Revisions

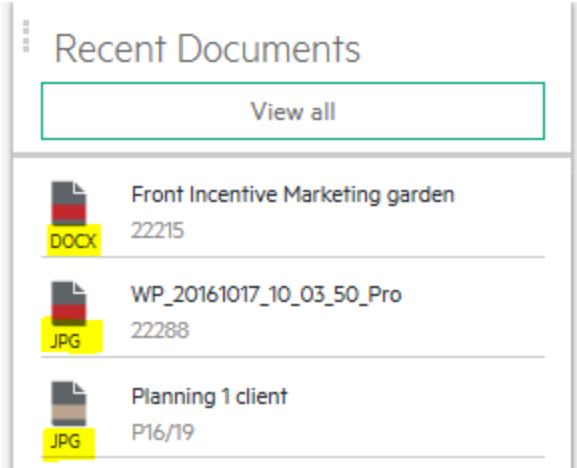
Make Final

Draft/Working document

Final and remove any previous Revisions

Availability of Document Extension

The inclusion of the document extension for a record has been extended to the Home panel of the Web Client.



Improvements to Number and Currency searches

Number and Currency searches, when constructed using the Search Editor, now support the ability to search for a value inside of a numeric range.

Record Search

The screenshot displays the 'Record Search' interface with the following components:

- Navigation:** 'Build Search Query' (active), 'Filter', 'Record Types', and 'Sort' tabs.
- Select Method:** A text input field and a list of methods: 'Alphabetical' and 'Category' (selected).
- Method List:** A scrollable list of search methods including: 'Additional Fields', 'Business Process', 'Client/Matter', 'Contacts, People and Places', 'Dates and Times', 'Document Management', 'Linked Navigation', 'Other', 'Records Management', and 'Reference and Control Numbers'.
- Build Query:** A visual representation of the search query: 'Invoice ID : 100 to 200' with a close button.
- Update search clause:** A section for refining the search, showing '# Invoice ID' with a help icon, a 'Not' checkbox, and 'Invoice ID' fields with 'From' (100) and 'To' (200) values.
- Action:** A green button labeled 'Finish updating search part'.

SDK Release Notes

.NET SDK

Major Changes

The changes in HPE Content Manager 9.1 .NET SDK generally reflect the features that have been introduced or obsoleted for this release. Of specific note for the SDK are the following:

- Changes to Document Streaming
- Enablement of Client Activity Logging

Summary of Object Changes

The following table provides a quick summary of all the changes to the .NET SDK interface. More information can be found in [Additional Details](#).

Object	Property/Method	Change Type	Topic
BulkDataLoader	AllocateContainer(Record)	New Method	Miscellaneous Changes
BulkDataLoader	CreateContactsFromEmailRecipients	New Property	Miscellaneous Changes
BulkDataLoader	CreateContactsOnlyForExistingLocations	New Property	Miscellaneous Changes
BulkDataLoader	ExtractMetadataFromContent	New Property	Miscellaneous Changes
CheckInPlace	MailFolderType	New Property	Miscellaneous Changes
CheckInStyle	CheckinStyle(Classification)	New Method	Miscellaneous Changes
CheckInStyle	UseForServerMailFolderType	New Property	Miscellaneous Changes
Classification	MoveClassification(Classification, Boolean)	New Method	Miscellaneous Changes
Consignment	AllowOnHold	Property Modified	Miscellaneous Changes
Consignment	Consignment(Database, ConsignmentDisposalType, TrimDateTime, Boolean, TrimMainObjectSearch, Boolean, Boolean, Boolean)	New Method	Miscellaneous Changes
Consignment	SelectingTopContainers()	New Method	Miscellaneous Changes

ContainmentRule	All	New Object	Miscellaneous Changes
CuspDateDisplayType	All	New Object	Miscellaneous Changes
Database	AllowUsersToSetDbClick	New Property	Miscellaneous Changes
Database	DbClickContainers	New Property	Miscellaneous Changes
Database	DbClickDocsDesktop	New Property	Miscellaneous Changes
Database	DbClickDocsTrim	New Property	Miscellaneous Changes
Database	DbClickExtLink	New Property	Miscellaneous Changes
Database	DeleteEmailCaptureDuplicates	New Property	Miscellaneous Changes
Database	IdolHasSecurityFiltering	New Property	Miscellaneous Changes
Database	Ping(Boolean)	New Method	Miscellaneous Changes
DbClickContainerStyle	All	New Object	Miscellaneous Changes
DbClickStyle	All	New Object	Miscellaneous Changes
DocumentStream	All	Object Obsoleted	Document Streaming
DownloadNotifier	All	New Object	Document Streaming
DownloadNotifierBase	DownloadNotifierBase(Database, Long)	New Method	Document Streaming
DownloadNotifierBase	DownloadNotifierBase(Database, Long, Long)	New Method	Document Streaming
EventProcessType	LdapSync	New Property	Miscellaneous Changes
Events	DataConversionCompleted	New Property	Miscellaneous Changes
Events	ScheduleReplaced	New Property	Miscellaneous Changes
FormDefinition	FormDefinition(Database, BaseObjectTypes, Integer)	New Method	Miscellaneous Changes
FormDefinition	FormDefinition(TrimObject, Integer)	New Method	Miscellaneous Changes
InputDocument	HasAttachments	New Property	Miscellaneous Changes

LdapAuthMethod	All	New Object	Miscellaneous Changes
LdapMatchingType	All	New Object	Miscellaneous Changes
LdapSearchScope	All	New Object	Miscellaneous Changes
Location	FindLocationByLDAPDN()	New Method	Miscellaneous Changes
Location	HomeDataset	New Property	Miscellaneous Changes
Location	IsVisitor	New Property	Miscellaneous Changes
Location	LdapSynchDN	New Property	Miscellaneous Changes
Location	LdapSynchEnabled	New Property	Miscellaneous Changes
Location	LdapSynchLastUpdated	New Property	Miscellaneous Changes
Location	OldPostalAddresses	New Property	Miscellaneous Changes
Location	OldPostalAddressesISO	New Property	Miscellaneous Changes
Location	OldStreetAddresses	New Property	Miscellaneous Changes
Location	OldStreetAddressesISO	New Property	Miscellaneous Changes
LocationAccess	View	New Property	Miscellaneous Changes
LogLevels	All	New Object	Miscellaneous Changes
LookupSet	IsUsedByAdditionalFields	New Property	Miscellaneous Changes
MailFolderTypes	All	New Object	Miscellaneous Changes
NotificationType	LocIncludedInAclGroup	New Property	Miscellaneous Changes
ObjectDef	ExtraPurposeEnum(Integer)	New Method	Miscellaneous Changes
ObjectDef	ExtraPurposeObjectType(Integer)	New Method	Miscellaneous Changes
ObjectDef	HasExtraPurposeParameter(Integer)	New Method	Miscellaneous Changes
ObjectDef	PurposeEnum	New Property	Miscellaneous Changes

Origin	AllocateContainer(Record, Boolean)	New Method	Miscellaneous Changes
Origin	BulkLoaderSettings	New Property	Miscellaneous Changes
Origin	EmailCaptureSettings	New Property	Miscellaneous Changes
OriginBulkLoaderSettings	All	New Object	Miscellaneous Changes
OriginEmailCaptureSettings	All	New Object	Miscellaneous Changes
OriginEmailCaptureSpamRule	All	New Object	Miscellaneous Changes
OriginEmailCaptureSpamRuleList	All	New Object	Miscellaneous Changes
OriginType	EmailCapture	New Property	Miscellaneous Changes
OriginType	Reserved3	Property Obsoleted	Miscellaneous Changes
OutputPathTypes	All	New Object	Miscellaneous Changes
PageItemDefinition	EditPurpose	New Property	Miscellaneous Changes
PageItemDefinition	EditPurposeExtra	New Property	Miscellaneous Changes
PageItemDefinition	SearchStartingPoint	New Property	Miscellaneous Changes
PageItemDefinition	WarnWhenBlank	New Property	Miscellaneous Changes
ProductFeatures	AccessExclusions	New Property	Miscellaneous Changes
ProductFeatures	EmailCapture	New Property	Miscellaneous Changes
ProductFeatures	Ldap	New Property	Miscellaneous Changes
PropertyDef	GetSearchOptionProperties(BaseObjectTypes, Database)	New Method	Miscellaneous Changes
PropertyIds	AppearanceUserOptionsDbClickContainers	New Property	Miscellaneous Changes
PropertyIds	AppearanceUserOptionsDbClickDocsDesktop	New Property	Miscellaneous Changes
PropertyIds	AppearanceUserOptionsDbClickDocsTrim	New Property	Miscellaneous Changes
PropertyIds	AppearanceUserOptionsDbClickExtLinkName	New Property	Miscellaneous Changes

PropertyIds	DropzoneUserOptionsShowAllSavedSearch	New Property	Miscellaneous Changes
PropertyIds	RecordEditDocument	Property Obsoleted	Miscellaneous Changes
PropertyIds	RecordEditDocumentCopy	Property Obsoleted	Miscellaneous Changes
PropertyIds	RecordTmpDocument	Property Obsoleted	Miscellaneous Changes
PropertyIds	RecordTmpRefFile	Property Obsoleted	Miscellaneous Changes
Record	AggregatedDisposal	New Property	Miscellaneous Changes
Record	GetSuggestedOutputPath(OutputPathTypes, String)	New Method	Miscellaneous Changes
Record	RevisionCount	New Property	Miscellaneous Changes
RecordRevision	PreservationNotes	New Property	Miscellaneous Changes
RecordType	CanContain(RecordType)	New Method	Miscellaneous Changes
RecordType	CanHaveContainer(RecordType)	New Method	Miscellaneous Changes
RecordType	ContainerRule	New Property	Miscellaneous Changes
RecordType	ContainerTypes	New Property	Miscellaneous Changes
RecordType	ContentsRule	New Property	Miscellaneous Changes
RecordType	ContentsTypes	New Property	Miscellaneous Changes
RecordType	EndUsersCanModify	New Property	Miscellaneous Changes
Schedule	ReplaceReferences(Schedule, Boolean, Boolean)	New Method	Miscellaneous Changes
SchedulePurposes	All	New Object	Miscellaneous Changes
ScheduleTrigger	AfterDays	New Property	Miscellaneous Changes
ScheduleTrigger	DelayType	New Property	Miscellaneous Changes
SearchClauseIds	RecordDueOrInTray	New Property	Miscellaneous Changes
SearchClauseIds	RecordScheduleStatus	New Property	Miscellaneous Changes

SearchClauseIds	ScheduleTriggerAfterDays	New Property	Miscellaneous Changes
SearchClauseIds	ScheduleTriggerDelayType	New Property	Miscellaneous Changes
SearchUserOptions	IsOptionRelevantFor(PropertyIds, BaseObjectTypes)	New Method	Miscellaneous Changes
TriggerDelayTypes	All	New Object	Miscellaneous Changes
TrimAccessControlList	SetInherited(Integer)	New Method	Miscellaneous Changes
TrimAccessControlList	SetPublic(Integer)	New Method	Miscellaneous Changes
TrimDateTime	AddWorkingDaySeconds(Long, CuspDateDisplayType, Boolean, Database)	New Method	Miscellaneous Changes
TrimDateTime	AdjustToWorkingDateTime (CuspDateDisplayType, Boolean, Database)	New Method	Miscellaneous Changes
TrimDateTime	TrimDateTime(TrimDateTime)	New Method	Miscellaneous Changes
TrimDateTime	WorkingDateTimeCompare(TrimDateTime, Database)	New Method	Miscellaneous Changes
TrimMainObjectSearch	TopContainersFilter	New Property	Miscellaneous Changes
TrimPathType	RenderOptionsPath	Property Obsoleted	Miscellaneous Changes
TrimSearchTopContainersFilter	All	New Object	Miscellaneous Changes
UserPermissions	RunSQLQuery	Property Obsoleted	Miscellaneous Changes

Additional Details

Miscellaneous Changes

In HPE Content Manager 9.1, a number of other small changes were made to facilitate minor enhancements or bug fixes outlined elsewhere in the Release Notes and not already covered by the modifications mentioned above.

Classes Added

- OriginBulkLoaderSettings: TrimSDKObject – A helper class used to store settings when using the Bulk Data Loader with an Origin object.

Methods

- OriginBulkLoaderSettings(Database database) – Creates an origin's bulk loader settings

object.

Properties (no corresponding Property IDs)

- **BatchSize** – returns Integer – Gets or sets a batch size to use when running a bulk loader import.
- **CheckConstraints** – returns Boolean – Gets or sets a boolean value indicating if the SQL BULK INSERT command should use the SQL Server CHECK_CONSTRAINTS option.
- **DoContentIndexing** – returns Boolean – Gets or sets a boolean value indicating if the bulk loaded records should generate content indexing events for the event processor.
- **DocumentCopyMode** – returns BulkLoaderCopyMode – Gets or sets an enumerated value indicating the preference for how documents should be copied to the HPE Content Manager document store.
- **DoWordIndexing** – returns Boolean – Gets or sets a boolean value indicating if the bulk loaded records should be word indexed.
- **DoWordIndexingWithEvents** – returns Boolean – Gets or sets a boolean value indicating if the bulk loaded records should word indexes by generating events for the event processor (otherwise the records will be indexed direct).
- **StreamDataToWorkgroup** – returns Boolean – Gets or sets a boolean value indicating if the bulk loader should stream BULK INSERT data files up to the workgroup (or simply present them directly via a UNC path).
- **UseBulkLoaderNumbering** – returns Boolean – Gets or sets a boolean value indicating if the bulk loaded records should have a generated record number specific to the bulk loader origin (faster than using the record type pattern).
- **UseOracleDirectPathLoad** – returns Boolean – Gets or sets a boolean value indicating if the SQL BULK INSERT command should use the Oracle DIRECT PATH LOAD option.
- **UseSQLServerTableLock** – returns Boolean – Gets or sets a boolean value indicating if the SQL BULK INSERT command should use the SQL Server TABLOCK option.
- **OriginEmailCaptureSettings: TrimSDKObject** – A helper class used to store settings when using an Origin object of type 'Email Capture'.

Methods

- **OriginEmailCaptureSettings(Database database)** – Creates an origin's email capture settings object.

Properties (no corresponding Property IDs)

- **CheckForDuplicates** – returns Boolean – Gets or sets a boolean value indicating if the email capture program should check for duplicates based on messageId and prevent

them being added into HPE Content Manager.

- **CreateContacts** – returns Boolean – Gets or sets a boolean value indicating if the email capture program should create contacts from email recipients.
- **CreateContactsOnlyForExistingLocations** – returns Boolean – Gets or sets a boolean value indicating when creating contacts from email recipients, limit contacts to only locations that already exist in the dataset. This prevents creating new 'unknown' locations from email addresses that haven't already been registered for a location.
- **IncludeJournalHeaders** – returns Boolean – Gets or sets a boolean value indicating if the journal headers for the email should be stored in the EML document.
- **LogLevel** – returns LogLevels – Gets or sets an enumerated value indicating the level of detail to be provided in the email capture log file.
- **MoveSpamToFolder** – returns Boolean – Gets or sets a boolean value indicating if the spam mail messages should be moved over to a separate folder rather than being simply deleted.
- **QuarantineFolder** – returns String – Gets or sets a string value indicating the name of a folder where any badly formatted email messages should be moved if they cannot be added into HPE Content Manager.
- **SpamFilters** – returns OriginEmailCaptureSpamRuleList – Gets or sets an array of spam filter rules to be used to determine if an email message is to be deemed as spam and therefore not added into HPE Content Manager.
- **SpamFolder** – returns String – Gets or sets a string value indicating the name of the folder to put any spam messages (if the MoveToSpamFolder setting is turned on).
- **UseBulkLoader** – returns Boolean – Gets or sets a boolean value indicating if the email capture program should use the bulk data loader.
- **OriginEmailCaptureSpamRule** – A helper class used to store a rule used to detect if an email is spam.

Methods

- **OriginEmailCaptureSpamRule()** – Creates an email capture spam rule object.

Properties (no corresponding Property IDs)

- **CheckCase** – returns Boolean – Gets or sets a boolean value indicating if the value check should be case-sensitive.
- **HeaderName** – returns String – Gets or sets the name of the email header that has the value to be checked by the rule.
- **MatchingValue** – returns String – Gets or sets the value to be used to determine if the header value matches this rule.

- `UseRegularExpression` – returns Boolean – Gets or sets a boolean value indicating if the matching value contains regular expressions.
- `OriginEmailCaptureSpamRuleList`: `System.Collections.IEnumerable` – Contains a list of rules used to detect if an email is spam.
 - The standard methods and properties that the .NET collection provides (use the object browser to get more details).
- `TrimSearchTopContainersFilter` – A helper class used to store a special filter that can be applied to a search which is used to select top containers by an aggregated disposal method technique.

Methods

- `TrimSearchTopContainersFilter()` – Creates a top container filter object.

Properties (no corresponding Property IDs)

- `AggregateContents` – returns Boolean – Gets or sets a boolean value indicating if the contents of a top level folder should be examined for a conflicting disposal instructions (contents with a more severe disposal instruction will cause the top container not to be selected).
- `AggregateContentsRecursive` – returns Boolean – Gets or sets a boolean value indicating that if contents are being aggregated, whether to look inside the contents of the contents recursively.
- `AggregateExcludeScheduled` – returns Boolean – Gets or sets a boolean value indicating that the search should exclude any top level container that has a specific (i.e. not aggregated) disposal instruction specified.
- `DisposalType` – returns `ConsignmentDisposalType` – Gets or sets an enumerated value indicating what type of disposal method will be required for this selection.
- `IncludeltemsInAConsignment` – returns Boolean – Gets or sets a boolean value indicating if records that are currently part of an existing consignment process will be retrieved when using this filter.
- `IncludeltemsOnHold` – returns Boolean – Gets or sets a boolean value indicating if records that are currently on hold will be retrieved when using this filter.
- `MaxResults` – returns Long – Gets or sets a number indicating the maximum number of results to be returned by this search.
- `OnlyBoxes` – returns Boolean – Gets or sets a boolean value indicating if only record types that have behavior of 'Box' will be selected (a common archiving use case for physical records).
- `OnOrBeforeArchiveDate` – returns `TrimDateTime` – Gets or sets a date object indicating the cutoff date for any archiving action to be due.

Classes Modified

- BulkDataLoader – Method added:
 - AllocateContainer(Record forNewRecord) – Sets the container for the new record based on the origin container allocation algorithm. If the property ContainerCreation is set to true for the origin object, then the container will automatically be allocated when you call SubmitRecord. If you need access to the record's allocated container prior to submitting the record, then you can do the container allocation explicitly by calling this method.
- BulkDataLoader – Properties added (no corresponding Property IDs):
 - CreateContactsFromEmailRecipients – returns Boolean – Gets or sets a boolean value indicating whether contacts should be created from email recipients.
 - CreateContactsOnlyForExistingLocations – returns Boolean – Gets or sets a boolean value indicating when creating contacts from email recipients, limit contacts to only locations that already exist in the dataset. This prevents creating new 'unknown' locations from email addresses that haven't already been registered for a location.
 - ExtractMetadataFromContent – returns Boolean – Gets or sets a boolean value indicating whether content should be examined for metadata when attaching a document to a new record. Basic metadata is obtained from the document title and creations date, however you can get further information such as document properties for openXML docs or EXIF data from JPG files if you enable this option.
- CheckInPlace – Property added (corresponding Property ID):
 - MailFolderType – returns MailFolderTypes – Gets or sets an enumerated value indicating one of the standard mail folders commonly used in email clients (PropertyIds.CheckinPlaceMailFolderType).
- CheckInStyle – Method added:
 - CheckinStyle(Classification classTarget) – Creates a new check in style object based off a classification.
- CheckInStyle – Property added (corresponding Property ID):
 - UseForServerMailFolderType – returns MailFolderTypes – Gets or sets an enumerated value indicating the type of folder that is being captured on the server (PropertyIds.CheckinStyleUseForServerMailFolderType).
- Classification – Method added:
 - MoveClassification(Classification newParent, bool updateAssociatedRecordNumbers) – This will move the classification to a new position within the classification hierarchy.

- Consignment – Method added:
 - Consignment(Database database, ConsignmentDisposalType initializeAsType, TrimDateTime cutoffDate, bool useBoxSelectionMode, TrimMainObjectSearch recordSubSelection, bool includeRecordsOnHold, bool requireOwnerApproval, bool requireOwnerAdministratorApproval) – Creates a consignment object with properties retrieved via the given disposal type, date, box selection style and search.
- Consignment – Property added (corresponding Property ID):
 - SelectingTopContainers – returns Boolean – Gets a boolean value indicating whether the initial record selection should use the top container aggregation search style (PropertyIds.ConsignmentSelectingTopContainers).
- Consignment – Property modified (corresponding Property ID):
 - AllowOnHold – returns Boolean – Gets a boolean value indicating whether the initial record selection will include records that are currently on hold (PropertyIds.ConsignmentAllowOnHold).
- Database – Method added:
 - Ping(bool checkDatabase) – returns Boolean – Checks the network connection to see if the workgroup server is available. There is also an option to test if the connection from the workgroup server to the database is alive. If it fails, extra information on the error can be found in the ErrorMessage property.
- Database – Properties added (corresponding Property IDs):
 - AllowUsersToSetDbClick – returns Boolean – Gets or sets a boolean value indicating whether users are allowed to set the double click behaviour for a record (PropertyIds.DatabaseAllowUsersToSetDbClick).
 - DbClickContainers – returns DbClickContainerStyle – Gets or sets an enumerated value that determines what happens when a user double clicks on a container (PropertyIds.DatabaseDbClickContainers).
 - DbClickDocsDesktop – returns DbClickStyle – Gets or sets an enumerated value that determines what happens when a user double clicks on a document in the HPE Content Manager's Desktop Client (PropertyIds.DatabaseDbClickDocsDesktop).
 - DbClickDocsTrim – returns DbClickStyle – Gets or sets an enumerated value that determines what happens when a user double clicks on a document in the HPE Content Manager's Thick Client (PropertyIds.DatabaseDbClickDocsTrim).
 - DbClickExtLink – returns String – Gets or sets an external link to run when a user double clicks on a record (PropertyIds.DatabaseDbClickExtLink).

- DeleteEmailCaptureDuplicates – returns Boolean – Gets or sets a boolean value to determine whether a captured email that is a copy of an email filed by a user should be deleted (PropertyIds.DatabaseDeleteEmailCaptureDuplicates).
- IdolHasSecurityFiltering – returns Boolean – Gets or sets a boolean value indicating whether the IDOL server implements full security filtering for a record (via the Omni Group Server) (PropertyIds.DatabaseIdolHasSecurityFiltering).
- FormDefinition – Methods added:
 - FormDefinition(Database db, BaseObjectTypes objectType, int formType) – Creates a new form definition object based off an object type and form type. Do not use this form for records or locations. Allows you to use a formType specifier that may result in a simpler form in some circumstances (for example, a formType of 1 for CheckinStyle provides the simpler email link style form).
 - FormDefinition(TrimObject forEditingObject, int formType) – Creates a new form definition object based off form type. Used for editing the supplied object. Allows you to use a formType specifier that may result in a simpler form in some circumstances (for example, a formType of 1 for CheckinStyle provides the simpler email link style form).
- InputDocument – Property added (no corresponding Property ID):
 - HasAttachments – returns Boolean – Gets or sets a boolean value indicating whether the email message has attachments. If you are passing a native email file such as .MSG or .EML, this allows you to indicate the email has attachments without having to extract them and pass them into AddAttachment.
- Location – Method added:
 - FindLocationByLDAPDN(Database db, string distinguishedName) – returns Location – A static function to find a location with the supplied LDAP (Lightweight Directory Access Protocol) distinguished name.
- Location – Properties added (corresponding Property IDs):
 - HomeDataset – returns String – Gets or sets a string value indicating, for a visitor login, the id of the dataset that is the home dataset that the visitor normally works with (PropertyIds.LocationHomeDataset).
 - IsVisitor – returns Boolean – Gets or sets a boolean value indicating if this user is a visitor login from the same managed service provider. (PropertyIds.LocationIsVisitor).
 - LdapSynchDN – returns String – Gets or sets a string value that holds the LDAP distinguished name associated with this locations (PropertyIds.LocationLdapSynchDN).

- `LdapSynchEnabled` – returns `Boolean` – Gets or sets a boolean value indicating whether LDAP synchronization is enabled for this location (`PropertyIds.LocationLdapSynchEnabled`).
- `LdapSynchLastUpdated` – returns `TrimDateTime` – Gets or sets a datetime value indicating when this location was last updated by the LDAP Synchronization tool (`PropertyIds.LocationLdapSynchLastUpdated`).
- `OldPostalAddresses` – returns `String` – Gets a string value containing a list of the all previous mailing addresses of this location (`PropertyIds.LocationOldPostalAddresses`).
- `OldPostalAddressesISO` – returns `String` – Gets a string value containing a list of the all previous mailing addresses of this location in ISO format (`PropertyIds.LocationOldPostalAddressesISO`).
- `OldStreetAddresses` – returns `String` – Gets a string value containing a list of the all previous street addresses of this location (`PropertyIds.LocationOldStreetAddresses`).
- `OldStreetAddressesISO` – returns `String` – Gets a string value containing a list of the all previous street addresses of this location in ISO format (`PropertyIds.LocationOldStreetAddressesISO`).
- `LookupSet` – Property added:
 - `IsUsedByAdditionalFields` – returns `String` – Gets a string value containing a list of the additional fields using this lookup set (`PropertyIds.LookupSetIsUsedByAdditionalFields`).
- `ObjectDef` – Methods added:
 - `ExtraPurposeEnum(int forPurposeValue)` – returns `AllEnumerations` – If the specified purpose has an extra purpose parameter, it will be either an object or an enumerated value. For example, `RecordPurposes.FindContainerFor` can have a `RecordType` object as an extra parameter, `LabelPurposes.Attach` can have a `BaseObjectTypes` enumerated value indicating what type of object you are selecting the label to attach to. If the extra purpose parameter for the specified `purposeValue` is an enumeration, this method returns the type of enumeration, otherwise it returns `AllEnumerations.Unknown`.
 - `ExtraPurposeObjectType(int forPurposeValue)` – returns `BaseObjectTypes` – If the specified purpose has an extra purpose parameter, it will be either an object or an enumerated value. For example, `RecordPurposes.FindContainerFor` can have a `RecordType` object as an extra parameter, `LabelPurposes.Attach` can have a `BaseObjectTypes` enumerated value indicating what type of object you are selecting the label to attach to. If the extra purpose parameter for the specified `purposeValue` is an URI of an object, this method returns the type of object, otherwise it returns `BaseObjectTypes.Unknown`.
 - `HasExtraPurposeParameter(int forPurposeValue)` – returns `Boolean` – For the given purpose, indicates whether extra information can be provided to supplement a given purpose value. For

example, when testing whether a record is suitable as a container (RecordPurposes.FindContainerFor) you can specify an extra parameter as the contained item's record type, which allows the function to provide a more accurate validation.

- ObjectDef – Property added (no corresponding Property ID)
 - PurposeEnum – returns AllEnumerations – Gets the enumerated value describing the purpose for this object when testing whether it is valid for usage in a certain context. This is used by TrimMainObjectSearch.SetPurpose and TrimMainObject.IsValidFor functions.
- Origin – Method added:
 - AllocateContainer(Record forNewRecord, bool crossProcessLock) – Sets the container on the supplied record based on the Origin container allocation policy. You should set the crossProcessLock to true if this Origin could be being used simultaneously by other processes.
- Origin – Properties added (no corresponding Property IDs):
 - BulkLoaderSettings – returns OriginBulkLoaderSettings – Gets or sets the set of properties associated with the bulk data loader to be used when importing from this origin.
 - EmailCaptureSettings – returns OriginEmailCaptureSettings – Gets or sets the set of properties used to determine how the email bulk capture tool should work when using this origin.
- PageItemDefinition – Properties added (no corresponding Property IDs):
 - EditPurpose – returns Integer – Gets an enumerated value relevant to the type of object being edited (when this item represents a TrimMainObject).
 - EditPurposeExtra – returns Long – Gets an enumerated value (as a supplement for the EditPurpose) relevant to the type of object being edited (when this item represent a TrimMainObject).
 - SearchStartingPoint – returns Integer – Gets an enumerated value as a starting point for object selection (when this item represents a TrimMainObject). For records, returns a suitable DesktopStartStates enumerated value, for other objects, returns a SearchStartPoint enumerated value.
 - WarnWhenBlank – returns Boolean – Gets or sets a boolean value indicating if it a warning should be issued (if a user interface is available) if this field has been left blank. An alternative to the available mandatory settings.
- PropertyDef – Method added:
 - GetSearchOptionProperties(BaseObjectTypes whenSearchingForObject, Database forDatabase) – returns PropertyDefList – Constructs an array of all property definitions that

belong to the `UserSearchOptions` option set and that are also relevant for use when searching for the specified type of object.

- Record – Method added:
 - `GetSuggestedOutputPath(OutputPathTypes usingPathFor, string withinWindowsFolder)` – returns `String` – Gets a suggested filename or folder name for this record, based on the purpose you plan to use it for. If you leave the `withinWindowsFolder` parameter blank, the path returned will be in a TEMP folder.
- Record – Properties added (corresponding Property IDs):
 - `AggregatedDisposal` – returns `String` – Gets a string describing the aggregated disposal schedule of a container by combining the innate disposal schedule for the container together with all the disposal instructions for the contents (recursively) (`PropertyIds.RecordAggregatedDisposal`).
 - `RevisionCount` – returns `Integer` – Gets a number indicating how many revisions of this document are currently available (includes the latest revision) (`PropertyIds.RecordRevisionCount`).
- RecordRevision – Property added (corresponding Property ID):
 - `PreservationNotes` – returns `String` – Gets or sets a string property describing the preservation notes for this revision, indicating why the revision should be preserved (`PropertyIds.RecordRevisionPreservationNotes`).
- RecordType – Methods added:
 - `CanContain(RecordType contentType)` – returns `Boolean` – Use this function to determine if a record of this type can act as a container for a record of the specified `contentType`. If it returns `false`, the `ErrorMessage` property will be set to provide extra information.
 - `CanHaveContainer(RecordType containerType)` – returns `Boolean` – Use this function to determine if a record of this type can be contained within a container of the specified `containerType`. If it returns `false`, the `ErrorMessage` property will be set to provide extra information.
- RecordType – Properties added (corresponding Property IDs if applicable):
 - `ContainerRule` – returns `ContainmentRule` – Gets or sets an enumerated value indicating the business rule for what is a suitable container for records of this type (`PropertyIds.RecordTypeContainerRule`).
 - `ContainerTypes` – returns `TrimURIList` – Gets or sets a list of record types representing the list of valid record types that can be containers of this record type. Use this with the `ContainerRule` value of `ByList`.

- ContentsRule – returns ContainmentRule – Gets or sets an enumerated value indicating the business rule for what sort of contents can be added to a container record of this type (PropertyIds.RecordTypeContentsRule).
- ContentsTypes – returns TrimURLList – Gets or sets a list of record types representing the list of valid record types that can be contains of a container record of this record type. Use this with the ContentsRule value of ByList.
- EndUsersCanModify – returns Boolean – Gets or sets a boolean value indicating whether users without 'Modify Record' permission can update record metadata if the record is not finalized. Users must have the Document Update permission (PropertyIds.RecordTypeEndUsersCanModify).
- Schedule – Method added:
 - ReplaceReferences(Schedule replacement, bool makeScheduleInactive, bool replaceOnAlreadyArchivedRecords) – Replaces all references to this schedule (in records, classifications, record types, origins, check in styles). You can also opt to make the schedule inactive after the references are done and also to keep the existing schedule on records that have been archived or destroyed according this schedule.
- ScheduleTrigger – Properties added (corresponding Property IDs):
 - AfterDays – returns Integer – Gets or sets an integer indicating how many months this trigger should wait before initiating the disposition change (PropertyIds.ScheduleTriggerAfterDays).
 - DelayType – returns TriggerDelayTypes – Gets an enumerated value indicating how long after the specified date that this trigger should wait before initiating the disposition change (PropertyIds.ScheduleTriggerDelayType).
- SearchUserOptions – Method added:
 - IsOptionRelevantFor(PropertyIds searchPropertyId, BaseObjectTypes searchForType) – returns Boolean – Determines if the specified search option is relevant for using with searches for the nominated object type.
- TrimAccessControlList – Methods added:
 - SetInherited(int forFunction) – Sets the access control for the nominated function to be inherited from the record's container.
 - SetPublic(int forFunction) – Sets the access control for the nominated function to be public.
- TrimDateTime – Methods added:
 - AddWorkingDaySeconds(long secondsToAdd, CuspDateDisplayType dispType, bool clearSeconds, Database db) – Adds the given seconds to the working date using the given date

display to start from and clear out the seconds value if indicated.

- AdjustToWorkingDateTime(CuspDateDisplayType dispType, bool clearSeconds, Database db) – Adjust the working date to the next given date display and clear out the seconds value if indicated.
- TrimDateTime(TrimDateTime date) – Creates a date object using the given date.
- WorkingDateTimeCompare(TrimDateTime other, Database db) – returns Boolean – Compare the working date to the given date from the given database.
- TrimMainObjectSearch – Property added (no corresponding Property ID):
 - TopContainersFilter – returns TrimSearchTopContainersFilter – Gets or sets a 'top containers' filter used for special aggregated archive search.

Enumerator Lists Added

- ContainmentRule – A list that contains a predefined set of containment rules, Rules are:
 - ByLevel [value=0] – Based on container level number.
 - ByLevelInclusive [value=1] – Based on container level number (Inclusive).
 - ByBehavior [value=2] – Based on record type behaviour.
 - ByList [value=3] – Based on a list of record types.
 - Prevented [value=4] – Prevent containment.
- CuspDateDisplayType – A list that contains a predefined set of working date display types. Display Types are:
 - StartOfDay [value=0] – Start of day.
 - EndOfDay [value=1] – End of day.
- DbIClickContainerStyle – A list that contains a predefined set of actions indicating what happens when double clicking on containers. Actions are:
 - NavContents [value=0] – Navigate to the contents.
 - Properties [value=1] – Open the container properties.
 - UseSystemOption [value=2] – Use the corresponding system option value.
- DbIClickStyle – A list that contains a predefined set of actions indicating what happens when double clicking a record. Actions are:

- Edit [value=0] – Edit the attached electronic record.
- View [value=1] – View the attached electronic record.
- Properties [value=2] – Open the record properties.
- UseSystemOption [value=3] – Use the corresponding system option value.
- LdapAuthMethod – A list that contains a predefined set of LDAP authentication methods. Methods are:
 - Anonymous [value=0] – Anonymous authentication.
 - Basic [value=1] – Basic authentication.
 - Ntlm [value=2] – NTLM authentication.
- LdapMatchingType – A list that contains a predefined set of LDAP attribute matching types. Types are:
 - Exact [value=0] – Exact match.
 - Substring [value=1] – Substring match.
 - WildCard [value=2] – WildCard match.
 - Regex [value=3] – Regular expression match.
- LdapSearchScope – A list that contains a predefined set of LDAP search scopes. Scopes are:
 - Base [value=0] – Base only.
 - OneLevel [value=1] – One level.
 - Subtree [value=2] – Whole sub-tree.
- LogLevels – A list that contains a predefined set of logging levels. Levels are:
 - Off [value=0] – Logging off.
 - On [value=1] – Logging on.
 - Verbose [value=2] – Detailed logging level.
- MailFolderTypes – A list that contains a predefined set of folder types. Types are:
 - NormalFolder [value=0] – Normal folder.
 - SentItems [value=1] – Sent items folder.

- ConversationHistory [value=2] – Conversation history folder.
- Calendar [value=3] – Calendar folder.
- OutputPathTypes – A list that contains a predefined set of output path types. Types are:
 - ExtractDocument [value=0] – For document extraction.
 - Reference [value=1] – For reference file.
 - Folder [value=2] – For windows folder.
- SchedulePurposes – A list that contains a predefined set of schedule purposes. Purposes are:
 - UseItem [value=0] – Use the item.
 - SearchByItem [value=1] – Search by the item.
 - MaintainItem [value=2] – Maintain the item.
 - ReplaceReferences [value=3] – Replace references.
- TriggerDelayTypes – A list that contains a predefined set of trigger delay types. Types are:
 - YearsAndMonths [value=0] – Years/months delay.
 - Days [value=1] – Days delay.
 - NoDelay [value=2] – No delay.

Enumerator Lists Modified

- EventProcessType – Type added:
 - LdapSync [value=16] – Directory synchronization event process.
- Events – Events added:
 - DataConversionCompleted [value=162] – Data conversion completed.
 - ScheduleReplaced [value=163] – Schedule replaced.
- LocationAccess – Access Control added:
 - View [value=5] – Can view details.
- NotificationType – Type added:
 - LocIncludedInAclGroup [value=18] – Location included in new access group.
- OriginType – Type added:
 - EmailCapture [value=9] – Email Capture type.

- OriginType – Type deleted:
 - Reserved3 – This property id is no longer applicable and has been removed.
- ProductFeatures – Features added:
 - EmailCapture [value=55] – Email capture feature.
 - Ldap [value=56] – LDAP/Directory Synchronization feature.
 - AccessExclusions [value=57] – Access exclusions feature.
- PropertyIds – Property Ids added:
 - AppearanceUserOptionsDbfClickContainers [value=8269] – System property.
 - AppearanceUserOptionsDbfClickDocsDesktop [value=8263] – System property.
 - AppearanceUserOptionsDbfClickDocsTrim [value=8264] – System property.
 - AppearanceUserOptionsDbfClickExtLinkName [value=8274] – System property.
 - DropzoneUserOptionsShowAllSavedSearch [value=8249] – System property.
- PropertyIds – Property Ids deleted:
 - RecordEditDocument – This property id is no longer applicable and has been removed.
 - RecordEditDocumentCopy – This property id is no longer applicable and has been removed.
 - RecordTmpDocument – This property id is no longer applicable and has been removed.
 - RecordTmpRefFile – This property id is no longer applicable and has been removed.
- SearchClauseIds – Clause added:
 - RecordDueOrInTray [value=807] – Records due or in tray search clause.
 - RecordScheduleStatus [value=810] – Record schedule search clause.
 - ScheduleTriggerAfterDays [value=808] – Schedule trigger after days search clause.
 - ScheduleTriggerDelayType [value=809] – Schedule trigger delay type search clause.
- TrimPathType – Path Type deleted:
 - RenderOptionsPath – This path type is no longer applicable and has been removed.
- UserPermissions – Permission deleted:
 - RunSQLQuery – This permission is no longer applicable and has been removed.

COM SDK

Major Changes

The changes in HPE Content Manager 9.1 COM SDK generally reflect the features that have been introduced or obsoleted for this release. Of specific note for the SDK are the following:

- Enablement of Client Activity Logging

Summary of Object Changes

The following table provides a quick summary of all the changes to the COM SDK interface. More information can be found in [Additional Details](#).

Object	Property/Method	Change Type	Topic
CheckInPlaceClass	MailFolderType	New Property	Miscellaneous Changes
CheckInStyleClass	UseForServerMailFolderType	New Property	Miscellaneous Changes
cnrContainmentRule	All	New Object	Miscellaneous Changes
ConsignmentClass	AllowOnHold	Property Modified	Miscellaneous Changes
ConsignmentClass	SelectingTopContainers	New Property	Miscellaneous Changes
DatabaseClass	AllowUsersToSetDbfClick	New Property	Miscellaneous Changes
DatabaseClass	DbfClickContainers	New Property	Miscellaneous Changes
DatabaseClass	DbfClickDocsDesktop	New Property	Miscellaneous Changes
DatabaseClass	DbfClickDocsTrim	New Property	Miscellaneous Changes
DatabaseClass	DbfClickExtLink	New Property	Miscellaneous Changes
DatabaseClass	DeleteEmailCaptureDuplicates	New Property	Miscellaneous Changes
DatabaseClass	IdolHasSecurityFiltering	New Property	Miscellaneous Changes
dccDbfClickContainerStyle	All	New Object	Miscellaneous Changes
dcsDbfClickStyle	All	New Object	Miscellaneous Changes
epEventProcessType	epLdapSync	New Property	Miscellaneous Changes
evEvents	evDataConversionCompleted	New Property	Miscellaneous Changes
evEvents	evScheduleReplaced	New Property	Miscellaneous Changes
LocationClass	HomeDataset	New Property	Miscellaneous Changes
LocationClass	IsVisitor	New Property	Miscellaneous Changes
LocationClass	LdapSynchDN	New Property	Miscellaneous Changes
LocationClass	LdapSynchEnabled	New Property	Miscellaneous Changes
LocationClass	LdapSynchLastUpdated	New Property	Miscellaneous Changes

LocationClass	OldPostalAddresses	New Property	Miscellaneous Changes
LocationClass	OldPostalAddressesISO	New Property	Miscellaneous Changes
LocationClass	OldStreetAddresses	New Property	Miscellaneous Changes
LocationClass	OldStreetAddressesISO	New Property	Miscellaneous Changes
LookupSetClass	IsUsedByAdditionalFields	New Property	Miscellaneous Changes
lxLocationAccess	lxView	New Property	Miscellaneous Changes
mftMailFolderTypes	All	New Object	Miscellaneous Changes
ortOriginType	ortEmailCapture	New Property	Miscellaneous Changes
ortOriginType	ortReserved3	Property Obsoleted	Miscellaneous Changes
prfProductFeatures	prfAccessExclusions	New Property	Miscellaneous Changes
prfProductFeatures	prfEmailCapture	New Property	Miscellaneous Changes
prfProductFeatures	prfLdap	New Property	Miscellaneous Changes
prmUserPermissions	prmRunSQLQuery	Property Obsoleted	Miscellaneous Changes
prpPropertyIds	prfRecordEditDocument	Property Obsoleted	Miscellaneous Changes
prpPropertyIds	prfRecordEditDocumentCopy	Property Obsoleted	Miscellaneous Changes
prpPropertyIds	prfRecordTmpDocument	Property Obsoleted	Miscellaneous Changes
prpPropertyIds	prfRecordTmpReffile	Property Obsoleted	Miscellaneous Changes
RecordClass	AggregatedDisposal	New Property	Miscellaneous Changes
RecordClass	RevisionCount	New Property	Miscellaneous Changes
RecordTypeClass	ContainerRule	New Property	Miscellaneous Changes
RecordTypeClass	ContentsRule	New Property	Miscellaneous Changes
RecordTypeClass	EndUsersCanModify	New Property	Miscellaneous Changes
RecRevisionClass	PreservationNotes	New Property	Miscellaneous Changes
SchTriggerClass	AfterDays	New Property	Miscellaneous Changes
SchTriggerClass	DelayType	New Property	Miscellaneous Changes
tdtTriggerDelayTypes	All	New Object	Miscellaneous Changes
tftTrimPathType	tftRenderOptionsPath	Property Obsoleted	Miscellaneous Changes

Additional Details

Client Activity Logging

In HPE Content Manager 9.1, there is now a registry key which allows any of the following client application activities against a dataset to be logged:

- Thick Client (trim.exe)
- Desktop Client (TrimDesktop.exe)

- Any custom COM SDK applications
- Any custom integrations

Details

The registry key to enable this process is:

- HKEY_LOCAL_MACHINE\SOFTWARE\Hewlett-Packard\HP TRIM\WorkgroupServerConnection\EnableClientLogging:DWORD=1
If this registry key is enabled, every client HPE Content Manager process on the machine will produce a log in this folder:
 - \Users\[user]\AppData\Local\Hewlett-Packard\HP TRIM\Log
The log is named after the executable, e.g. TRIM.exe_2016_10_31.log and is of the same format as the HPE Content Manager workgroup server log.

If multiple processes of the same name are running, then a process ID is inserted into the log name to keep different processes logging to different files.

The log file contains the dataset activity as well as timed messages for each RCF (Remote Call Framework) call to the workgroup server.

It is also possible to turn on RCF logging with this (previously implemented) key:

- HKEY_LOCAL_MACHINE\SOFTWARE\Hewlett-Packard\HP TRIM\WorkgroupServers\EnableRcfTracing:DWORD=1
If this key is turned on, RCF log messages will also appear in the client log.

Miscellaneous Changes

In HPE Content Manager 9.1, a number of other small changes were made to facilitate minor enhancements or bug fixes outlined elsewhere in the Release Notes and not already covered by the modifications mentioned above.

Classes Modified

- CheckInPlaceClass – Property added (corresponding Property ID):
 - MailFolderType – returns mftMailFolderTypes – Gets or sets an enumerated value indicating one of the standard mail folders commonly used in email clients (prpPropertyIds.prpCheckinPlaceMailFolderType).
- CheckInStyleClass – Property added (corresponding Property ID):
 - UseForServerMailFolderType – returns mftMailFolderTypes – Gets or sets an enumerated value indicating the type of folder that is being captured on the server (prpPropertyIds.prpCheckinStyleUseForServerMailFolderType).

- ConsignmentClass – Property added (corresponding Property ID):
 - SelectingTopContainers – returns Boolean – Gets a boolean value indicating whether the initial record selection should use the top container aggregation search style (prpPropertyIds.prpConsignmentSelectingTopContainers).
- ConsignmentClass – Property modified (corresponding Property ID):
 - AllowOnHold – returns Boolean – Gets a boolean value indicating whether the initial record selection will include records that are currently on hold (prpPropertyIds.prpConsignmentAllowOnHold).
- DatabaseClass – Properties added (corresponding Property IDs):
 - AllowUsersToSetDbClick – returns Boolean – Gets or sets a boolean value indicating whether users are allowed to set the double click behaviour for a record (prpPropertyIds.prpDatabaseAllowUsersToSetDbClick).
 - DbClickContainers – returns dccDbClickContainerStyle – Gets or sets an enumerated value that determines what happens when a user double clicks on a container (prpPropertyIds.prpDatabaseDbClickContainers).
 - DbClickDocsDesktop – returns dcsDbClickStyle – Gets or sets an enumerated value that determines what happens when a user double clicks on a document in the HPE Content Manager's Desktop Client (prpPropertyIds.prpDatabaseDbClickDocsDesktop).
 - DbClickDocsTrim – returns dcsDbClickStyle – Gets or sets an enumerated value that determines what happens when a user double clicks on a document in the HPE Content Manager's Thick Client (prpPropertyIds.prpDatabaseDbClickDocsTrim).
 - DbClickExtLink – returns String – Gets or sets an external link to run when a user double clicks on a record (prpPropertyIds.prpDatabaseDbClickExtLink).
 - DeleteEmailCaptureDuplicates – returns Boolean – Gets or sets a boolean value to determine whether a captured email that is a copy of an email filed by a user should be deleted (prpPropertyIds.prpDatabaseDeleteEmailCaptureDuplicates).
 - IdolHasSecurityFiltering – returns Boolean – Gets or sets a boolean value indicating whether the IDOL server implements full security filtering for a record (via the Omni Group Server) (prpPropertyIds.prpDatabaseIdolHasSecurityFiltering).
- LocationClass – Properties added (corresponding Property IDs):
 - HomeDataset – returns String – Gets or sets a string value indicating, for a visitor login, the id of the dataset that is the home dataset that the visitor normally works with (prpPropertyIds.prpLocationHomeDataset).

- `IsVisitor` – returns Boolean – Gets or sets a boolean value indicating if this user is a visitor login from the same managed service provider. (`prpPropertyIds.prpLocationIsVisitor`).
- `LdapSynchDN` – returns String – Gets or sets a string value that holds the LDAP distinguished name associated with this locations (`prpPropertyIds.prpLocationLdapSynchDN`).
- `LdapSynchEnabled` – returns Boolean – Gets or sets a boolean value indicating whether LDAP synchronization is enabled for this location (`prpPropertyIds.prpLocationLdapSynchEnabled`).
- `LdapSynchLastUpdated` – returns System.DateTime – Gets or sets a datetime value indicating when this location was last updated by the LDAP Synchronization tool (`prpPropertyIds.prpLocationLdapSynchLastUpdated`).
- `OldPostalAddresses` – returns String – Gets a string value containing a list of the all previous mailing addresses of this location (`prpPropertyIds.prpLocationOldPostalAddresses`).
- `OldPostalAddressesISO` – returns String – Gets a string value containing a list of the all previous mailing addresses of this location in ISO format (`prpPropertyIds.prpLocationOldPostalAddressesISO`).
- `OldStreetAddresses` – returns String – Gets a string value containing a list of the all previous street addresses of this location (`prpPropertyIds.prpLocationOldStreetAddresses`).
- `OldStreetAddressesISO` – returns String – Gets a string value containing a list of the all previous street addresses of this location in ISO format (`prpPropertyIds.prpLocationOldStreetAddressesISO`).
- `LookupSetClass` – Property added:
- `IsUsedByAdditionalFields` – returns String – Gets a string value containing a list of the additional fields using this lookup set (`prpPropertyIds.prpLookupSetIsUsedByAdditionalFields`).
- `RecordClass` – Properties added (corresponding Property IDs):
 - `AggregatedDisposal` – returns String – Gets a string describing the aggregated disposal schedule of a container by combining the innate disposal schedule for the container together with all the disposal instructions for the contents (recursively) (`prpPropertyIds.prpRecordAggregatedDisposal`).
 - `RevisionCount` – returns Integer – Gets a number indicating how many revisions of this document are currently available (includes the latest revision) (`prpPropertyIds.prpRecordRevisionCount`).
- `RecordTypeClass` – Properties added (corresponding Property IDs if applicable):
 - `ContainerRule` – returns `cnrContainmentRule` – Gets or sets an enumerated value indicating the business rule for what is a suitable container for records of this type

(prpPropertyIds.prpRecordTypeContainerRule).

- ContentsRule – returns cnrContainmentRule – Gets or sets an enumerated value indicating the business rule for what sort of contents can be added to a container record of this type (prpPropertyIds.prpRecordTypeContentsRule).
- EndUsersCanModify – returns Boolean – Gets or sets a boolean value indicating whether users without 'Modify Record' permission can update record metadata if the record is not finalized. Users must have the Document Update permission (prpPropertyIds.prpRecordTypeEndUsersCanModify).
- RecRevisionClass – Property added (corresponding Property ID):
 - PreservationNotes – returns String – Gets or sets a string property describing the preservation notes for this revision, indicating why the revision should be preserved (prpPropertyIds.prpRecRevisionPreservationNotes).
- SchTriggerClass – Properties added (corresponding Property IDs):
 - AfterDays – returns Integer – Gets or sets an integer indicating how many months this trigger should wait before initiating the disposition change (prpPropertyIds.prpScheduleTriggerAfterDays).
 - DelayType – returns tdtTriggerDelayTypes – Gets an enumerated value indicating how long after the specified date that this trigger should wait before initiating the disposition change (prpPropertyIds.prpScheduleTriggerDelayType).

Enumerator Lists Added

- cnrContainmentRule – A list that contains a predefined set of containment rules, Rules are:
 - cnrByLevel [value=0] – Based on container level number.
 - cnrByLevelInclusive [value=1] – Based on container level number (Inclusive).
 - cnrByBehavior [value=2] – Based on record type behaviour.
 - cnrByList [value=3] – Based on a list of record types.
 - cnrPrevented [value=4] – Prevent containment.
- dccDbClickContainerStyle – A list that contains a predefined set of actions indicating what happens when double clicking on containers. Actions are:
 - dccNavContents [value=0] – Navigate to the contents.
 - dccProperties [value=1] – Open the container properties.

- dccUseSystemOption [value=2] – Use the corresponding system option value.
- dcsDbClickStyle – A list that contains a predefined set of actions indicating what happens when double clicking a record. Actions are:
 - dcsEdit [value=0] – Edit the attached electronic record.
 - dcsView [value=1] – View the attached electronic record.
 - dcsProperties [value=2] – Open the record properties.
 - dcsUseSystemOption [value=3] – Use the corresponding system option value.
- mftMailFolderTypes – A list that contains a predefined set of folder types. Types are:
 - mftNormalFolder [value=0] – Normal folder.
 - mftSentItems [value=1] – Sent items folder.
 - mftConversationHistory [value=2] – Conversation history folder.
 - mftCalendar [value=3] – Calendar folder.
- tdtTriggerDelayTypes – A list that contains a predefined set of trigger delay types. Types are:
 - tdtYearsAndMonths [value=0] – Years/months delay.
 - tdtDays [value=1] – Days delay.
 - tdtNoDelay [value=2] – No delay.

Enumerator Lists Modified

- epEventProcessType – Type added:
 - epLdapSync [value=16] – Directory synchronization event process.
- evEvents – Events added:
 - evDataConversionCompleted [value=162] – Data conversion completed.
 - evScheduleReplaced [value=163] – Schedule replaced.
- lxLocationAccess – Access Control added:
 - lxView [value=5] – Can view details.
- ortOriginType – Type added:
 - ortEmailCapture [value=9] – Email Capture type.
- ortOriginType – Type deleted:
 - ortReserved3 – This property id is no longer applicable and has been removed.

- prfProductFeatures – Features added:
 - prfEmailCapture [value=55] – Email capture feature.
 - prfLdap [value=56] – LDAP/Directory Synchronization feature.
 - prfAccessExclusions [value=57] – Access exclusions feature.
- prmUserPermissions – Permission deleted:
 - prmRunSQLQuery – This permission is no longer applicable and has been removed.
- prpPropertyIds – Property Ids deleted:
 - prpRecordEditDocument – This property id is no longer applicable and has been removed.
 - prpRecordEditDocumentCopy – This property id is no longer applicable and has been removed.
 - prpRecordTmpDocument – This property id is no longer applicable and has been removed.
 - prpRecordTmpRefFile – This property id is no longer applicable and has been removed.
- tftTrimPathType – Path Type deleted:
 - tftRenderOptionsPath – This path type is no longer applicable and has been removed.

Enhancement Requests included in this Release

CR Number	Customer Note
292	<p>Record List Pane - Sort Order, ability to set the sort order for contained records when double click container record.</p> <p>The following rules now apply:</p> <ul style="list-style-type: none"> • If the Search Option, "Show the contained items in reverse date order" is checked the sort order is set to regDate desc, fullrecordId desc • If the Search Option is not set and a default sort order has been set then this is used for the contained records . • If the Search Option is not set and there is no default sort order then the sort is by title ascending .
416	<p>External Links - Make it possible to associate double click on a record (or other object) to execute a particular external link rather than do properties.</p> <p>Enhanced. In the System Options, under the User Interface Tab a new option called "Run External Link on Double Click" has been added that allows users to set the double click behavior for records</p>
2738	<p>Record Types - Container Level - User Interface - virtually impossible to remember whether 0 is most like a container or most like a document.</p> <p>Enhanced. Default container level numbers can now be seen on the drop down list provided in the containment rules tab provided for record types.</p>
5621	<p>Location Access Control - Add a 'Can View' access control to locations so that locations can be hidden from some users.</p> <p>Enhanced. A new Location access control "Can view details" is now provided that allows users to be restricted from viewing a location in HPE Content Manager.</p>
14107	<p>TRIM Desktop - Ability to turn on and off the auto checkout function i.e. double click will view when it is turned off.</p> <p>Enhanced. In the System Options, under the User Interface Tab four new options have been added that allows users to set the behavior of Edit, View and Properties.</p>
14631	<p>In properties dialog display the container title instead of the number.</p> <p>Enhanced. Added a tooltip that displays the Container Title</p>

19440	<p>Record Types - Folder (Paper Only) (behaviour) - We should grey out the electronic tab when this behaviour is set.</p> <p>Enhanced. The Record Type Electronic tab is now disabled for Record types of behavior Folder (Paper only).</p>
34467	<p>Make double clicking behavior on a record same for TRIM & Desktop.</p> <p>Enhanced. In the System Options, under the User Interface Tab four new options have been added that allows users to set the behavior of Edit, View and Properties.</p>
37450	<p>Index for a system having slow recordid searches and TRIM timeouts when starting Outlook.</p> <p>As of the 9.0 release the HPE CM Outlook Add-in no longer interacts with HPE CM when Outlook is opened. It is only when a user actively attempts to interact with HPE CM or a Linked Folder activity is triggered that a connection is made. This means that the issue described is no longer extant.</p>
43501	<p>Enhancing matching options in searching for a location in TRIM .</p> <p>Enhanced. With this option set, if an existing location matches the LDAP record that is being synchronized, then we synchronize to the existing location rather than create a new one.</p>
43775	<p>Unable to reindex additional fields when selecting mutiple records in the Client.</p> <p>In HPECM 9.0 it is possible to reindex additional fields on multiple records.Tag all the records you wish to reindex, select Administration tools from the right mouse menu, choose all tagged records then select the check box "Also Reindex Additional Fields".</p>
45015	<p>Series Record Field can no longer be made as optional field , and it cannot be removed from Record Data Entry Form when the option of "Record should be placed within a Series" from Record Type properties is ticked.</p> <p>Enhanced. If the Record type is set to "Record should be placed in a series" and also has a default, then the "Series Record" field is no longer automatically added to the form at the top. If you want to configure so that users can modify the default series, you need to add the "Series Record" to the form.</p>
45066	<p>Ability to attach electronic renditions of records when sending email from Outlook.</p> <p>Enhanced. Electronic Renditions can now be inserted into email messages from within the Outlook Addin.</p>
45093	<p>Ability to perform "reassign action " task in bulk should be added.</p> <p>Enhanced. User can now tag multiple record actions and reassign them</p>

45101	<p>The new Insert options in the Word addin don't follow the search preferences set in TRIM Context Options.</p> <p>Enhanced. The user's search preferences are now observed when searching in the Office Addins.</p>
45251	<p>Creating a new record from the classification the default cursor is on a greyed out field.</p> <p>Enhanced. The initial focus is now set to the title field or the first writable field.</p>
46960	<p>Records - Changing the properties of a location does not populate the correct information of a record if they are based on location Titling Method.</p> <p>Enhanced. If you change a location name used in a client record title the record title of existing records is updated to the new location information.</p>
47350	<p>Database - improve speed in displaying search results using Oracle 11g - delays between queries.</p> <p>The delay isn't specific to Oracle - a similar delay is encountered in SQL Server. It is proportional to the number of records being selected in the query. Some of the delay is occurring at the workgroup server after the query has been issued and before the results are sent to the client, the remainder is the transmission time taken for the results to be sent.</p> <p>When we do the initial query we return a buffer of results back to the client. This buffer is then worked through, displaying a full set of results a batch at a time. The delay is the time taken to fill the buffer with results and then transmit them back to the client.</p> <p>An enhancement request has been created to look at tuning the size of this buffer to improve performance and reduce this delay.</p>
47536	<p>Restrict which lower level Record Types can be contained so that a set hierarchy of records can be achieved.</p> <p>Enhanced. In the Record Type, a new tab called "Containment" has been added that allows user to set the containment behavior.</p>
49638	<p>A document can be left half checked out if a user interrupts the checkout process.</p> <p>Enhanced. The checkout process has been reviewed and no longer possible to have a "half checked out" state.</p>
51500	<p>Bulk Delete - we need a new notification type to indicate that many items have been removed.</p> <p>Enhanced. A new notification type has been implemented to indicate which objects of type were deleted.</p>

51764	<p>Show Historic addresses for a Location in the View Pan.</p> <p>Enhanced. There are now new properties added to the View pane that will show all the Historic addresses for the selected Location.</p>
52035	<p>Web Client - Allow sort order of results to be modified.</p> <p>HPE Content Manager 9.0 has the ability to sort supported object searches based on the users selection of 3 sort orders. The list of fields that can be used for sorting is extensive and closely mirrors the same options presented in the main client. These Sort orders can also be saved as default sort fields</p>
52605	<p>Spelling options not saving when applying them as Global Settings.</p> <p>Enhanced. Spelling advanced options are now getting saved when applying them as Global settings.</p>
52894	<p>Access Control and Security - Allow End Users the ability to Modify Record Metadata until the record is finalized.</p> <p>Enhanced. A new option "Allow users with 'Update Document' permission to modify unfinalized record metadata" is now available at the Record type -> Menu tab.</p>
53243	<p>Render - EML file attachments not being rendered.</p> <p>Enhanced. Attachments for EML files are now rendered</p>
53880	<p>DataPort - allow users to define search criteria from within the export tool.</p> <p>Enhanced. When exporting objects using DataPort, users can now click the "Open Search dialog" button to open the HPE Content Manager search dialog to enable them to search for and create new Saved Searches, or for records, search for and add records to a HPE Content Manager tray. When exporting records, users can now opt to use a Saved Search or Trays as their Export Source Data.</p>
54240	<p>WebClient does not validate Currency or Decimal Additional Field values for a Search.</p> <p>Enhanced. Currency and Decimal fields are now of input type 'Number'. Users can search for a single value and also do range search</p>
54798	<p>Database - Oracle - Slow 'Registered by' Search with Date Range.</p> <p>Enhanced. It appears to be an issue with the way the Oracle Optimizer deals with the security filter clauses. There has been a review of the way security filtering is done which should address this issue.</p>
55154	<p>Access Controls and Security - Allow users to change containers for records.</p> <p>Enhanced. Users are now allowed to change containers for records(with Access Controls Based on Container) when the effective access is not altered by changing container.</p>

55433	<p>Word Indexes - Provide the ability to run the Word Reindexing Tool (Text Additional Fields for Records) but exclude particular additional fields.</p> <p>Enhanced. Within HPE Content Manager Enterprise Studio, on a selected Dataset's Utilities -> Index Text window, the 'Text Additional Fields for Records' option is now accompanied by a 'Select' button which allows the user to select or deselect additional fields to be indexed.</p>
55584	<p>Custom Toolbar - Create a Reassign Action Button that should work at a Record Level.</p> <p>Enhanced. A reassign current action menu item has been implemented</p>
55642	<p>TRIM/RM to automatically populate the number of pages field for documents when registered.</p> <p>Enhanced. HPE Content Manager now automatically populates the "number of pages" field for a registered electronic document.</p>
55869	<p>Options and Configurations - Add Favorite Saved Searches Tray to Dropzone.</p> <p>Enhanced. A new option "Show records from all your saved search' is now displayed in the Options->Dropzone tab. If this option is enabled and HPE CM Client is minimized, the Dropzone window will display a list of record from the Saved Searches. Although, there is a default limit of 100 records to be displayed in the Dropzone window.</p>
55970	<p>Revision - Functionality to allow users to provide reasons to preserve record revisions .</p> <p>Enhanced. A new edit control has been added to the Checkin dialog, under the Make New Revision radio button. The default is 'I want to retain this revision because...'. The edit field is not mandatory.</p>
56107	<p>Kofax Integration - determine if we can support 64 bit.</p> <p>Workaround. Install 32 and 64 bit TRIM versions to run against the corresponding 32/64bit applications</p>
56444	<p>SharePoint Integration - Setup Wizard.</p> <p>Enhanced. A setup wizard has been created to help users walk through each of the steps described in the SharePoint Integration installation/setup documentation</p>
56811	<p>WebClient - The Show Contacts function on a record display the list of contacts but you lose the record search you had.</p> <p>Enhanced. Clicking on the back button takes you back to the record you navigated from.</p>

56848	<p>Add a document preview pane to the web client.</p> <p>Enhanced. Added a document preview pane to the Web Client</p>
57095	<p>Checkin - Deleting documents on checkin from local location similar to Offline records.</p> <p>Enhanced. The local file will now be deleted if the user option to delete files is enabled.</p>
57563	<p>Implement specific control over which record types are allowed to be attached or contained within other record types.</p> <p>Enhanced. A new tab provided on the Records type form called Containment. Users are able to now specify rules that will determine the operation of the containers in this section and will allow greater flexibility.</p>
57626	<p>Provide options to configure the document store integrity check log.</p> <p>Enhanced. A check box "Only log errors" is now provided in 'Run Integrity Check' dialog</p>
57630	<p>Active Audit Events - No ability to export from one dataset and import into another.</p> <p>Enhanced. Active Audit Events on records can now be exported and imported into a new dataset.</p>
57769	<p>Provide system option allowing user to choose double click behavior.</p> <p>Enhanced. In the System Options, under the User Interface Tab four new options have been added that allows users to set the Double Click Behavior</p>
57950	<p>Associated Locations displayed in Date Created Order rather than Alphabetical.</p> <p>Enhanced. Associated locations are now being displayed in alphabetical order.</p>
58342	<p>Workflow - Re-assigning an activity display the favorites locations instead of the Search all locations.</p> <p>Enhanced. The user is now able to define the starting point for searching locations when reassigning a workflow activity.</p>
58391	<p>RM Client - System Options Misc - Add a separate 'Records that behave as documents can only be contained within Records that behave as boxes' option.</p> <p>Enhanced. Users can now specify rules around container and content record types at the containment tab provided for Record types.</p>

58522	<p>DataPort - enhancement to provide a feature in DataPort to allow customer to configure the order in which properties are processed.</p> <p>Enhanced. The list of ordered properties for records is now available in the Data Port preferences file. If issues are seen with record importing due to the order of properties, users can be now be assisted to add the required information to the preferences file rather than having to get a new build of Data Port.</p>
58871	<p>Additional Fields - Ability to use alternative caption for different record types.</p> <p>Enhanced. 'Alternative Caption' field is now available in the Properties dialog of an additional field.</p>
59125	<p>DocuSign - improve monitor to obtain details of why users decline to authenticate.</p> <p>Enhanced. The reason for signature decline is captured and now made available in the editor comments. Also the same is provided in the email notification to the editor.</p>
59162	<p>WebClient - Security/Access page does not show up on data entry form when its Record Type is setup with Security/Access page .</p> <p>Enhanced. Now the Security/Access page shows up on data entry form when its Record Type is setup with Security/Access page.</p>
59163	<p>Schema Manager - Add a "Convert to Unicode" option.</p> <p>Enhanced. There is now a 'Convert to Unicode' right-click menu option in the Schema Manager.</p>
59171	<p>Generate Alert When Process Event Queue Becomes Blocked.</p> <p>Enhanced. An alert is now generated when the process event queue becomes blocked</p>
59238	<p>IDOL indexing - enable CM to index Enterprise IDOL and OGS Server.</p> <p>Enhanced. Now HPE Content Manager is able to use OEM version of OGS Server to do security filtering</p>
59261	<p>UDF - Add "Used By Additional Field" as index value to Lookup Sets.</p> <p>Enhanced. 'Used by Additional Fields' is now available on the View Pane of Lookup Sets. The value is correctly populated when an Additional Field uses a Lookup set.</p>

59272	<p>Modify Record Access control stops user from changing container for record when Based on Container and Referenced access control is being used for the record.</p> <p>Enhanced. When changing a record's container, if there is an access control set to "based on container", then the user is now allowed to change container when there is no change in the record access control after moving to the new container. If there is a change then this is prevented.</p>
59273	<p>Incorrect result from Record Number range search when using invalid or non-exist record number.</p> <p>Documented. This is a limitation of a string search. Record numbers as opposed to expanded record numbers are strings not numbers. When in a range search the value(s) selected for the "to" or "from" fields do not exist, HPECM executes a string search. This means that a string like G16/16 is greater than say G16/200. Thus when a search returns records it may include records not expected in the result set. The exception for record search is when you select two record numbers for the "to" and "from" fields that exist in the database. In this case HPECM converts the record numbers to expanded record numbers prior to executing the search and therefore returns for expected result.</p>
59369	<p>Allow individual icons in the ribbon to be resized.</p> <p>Enhanced. Now users have the ability to set large icons on the HPE Content Manager Ribbon. Please note, Resizing individual icons has not been made available.</p>
59396	<p>The ability of retention trigger to be calculated by days.</p> <p>Enhanced. Users are now provided the option for retention trigger to be calculated by days.</p>
59479	<p>Document Review and Authorization - Add records to the assigned Reviewer/Authorizer's Records In and/or Records In or Due Tray.</p> <p>Enhanced. Records that are due for review or authorization is now made accessible from the Due Tray or the "In or Due Tray" for Reviewers or Authorizers.</p>
59488	<p>Request to provide the function for user to perform Get Global in Web Client to load the settings saved under Web Client References.</p> <p>Enhanced. HPE Content Manager Administrator can now set Web Client Global Settings via the Web Client interface. The global settings include Timezone, Bypass File Types, Trapeze Viewer File Types, Dashboard Configuration.</p>
59507	<p>Locations - States - need to increase size for zip code.</p> <p>Enhanced. The size of zip code has been increased from 12 to 50.</p>

59569	<p>Render - provide an option to specify the polling interval for calls to the DocuSign server.</p> <p>Enhanced. Now Users can specify the polling interval at the DocuSign options tab.</p>
59705	<p>Iron Mountain - Allow multiple warehouses to be defined using the same district code but different customer account ID.</p> <p>Enhanced. Now a customer id is required for each warehouse node, order files can be created using both customer and district id to create unique orders. A unique timestamp is generated once per second for each file produced so that its file name will be unique. The verification routine now allows for warehouses to share the same district ID provided that they all have different customer account ids. There is now no requirement for warehouses to define different toDir or fromDir directories.</p>
59721	<p>Iron Mountain - allow use of user defined fields to put values into order files.</p> <p>Enhanced. Users can specify user defined values to generate the content of order files.</p>
59778	<p>Action email notifications not being sent to a position.</p> <p>Enhanced. A position now behaves like a group or organization for the purposes of emailing notifications.</p>
60032	<p>WebDrawer - Add the calendar feature for dates on the WebDrawer.</p> <p>Enhanced. The Calendar feature is now available for performing record searches based on date range.</p>
60306	<p>Search Toolbar - display object name strings and not uris when doing single object searches.</p> <p>Enhanced. Object name strings are displayed when doing single object searches.</p>