

Content Manager

Software Version 10.0

Release Notes



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Software Release Date: March 2021

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

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Micro Focus Content Manager Release Notes

Introduction to Content Manager 10.0

Micro Focus Content Manager 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.

With tight desktop integration and the ability to scale across large, distributed environments, Content Manager lets organizations capture, classify, manage, access, and secure enterprise information, from electronic to physical records, including Microsoft 365. Regardless of content creation and collaboration, Content Manager abilities let organizations leverage accurate, contextual, and complete information throughout its lifecycle. Managing content this way helps significantly improve serviceability, business decisions, and insight for future strategy.

Content Manager provides document and records management, e-mail management, web content management, imaging, workflow, and document-centric collaboration to organizations worldwide. Developed with more than three decades of information management expertise into comprehensive, "out-of-the-box" software and a cornerstone of the Micro Focus Secure Content Management Suite, Content Manager enables organizations to lower operating costs, secure information, enhance compliance, and increase productivity.

By focusing on Web Client capabilities; SharePoint, OneDrive, Office features; life cycle management, and SDK improvements, Content Manager 10.0 addresses the areas of cost, compliance, productivity, information privacy, and security.

Content Manager 10.0 is designed to support 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 Content Manager

This is a major release and the first in the Content Manager 10 program series. This release includes all fixes and enhancements that were shipped in the previous releases of Content Manager. For details of the previous releases, please refer to the relevant release notes.

This release includes support for English (International) and English (US).

For technical details, including the support matrix, refer to **CM10.0_Spec.pdf** and **CM10.0_Install.pdf**

The SDK Release Notes for this release can be found on https://content-manager-sdk.github.io/Community/10/release_notes.html

A list of enhancement requests included in this release can be found at <https://softwaresupport.softwaregrp.com/doc/KM03783144>

To access a list of defects included in this release:

1. Navigate to <https://softwaresupport.softwaregrp.com>
2. Log on using your passport (SAID required)
3. Select "Knowledge Base"
4. Construct search by selecting:
 - a. Document type -> "known problems"
 - b. Products -> "content manager"
 - c. Version -> "x.xx" or "xx.x" e.g. 9.40 or 10.0
 - d. Workflow Status -> "completed"
5. Select "Save Search" and enter a name for later reference.

Upgrade Considerations

If you have an existing Elasticsearch index, the introduction of a new schema in Content Manager 10.0 will require the creation a completely new Elasticsearch content index.

The way documents and metadata are stored in Elasticsearch has been redeveloped to enhance performance and avoid the need to create a new index when schema changes are introduced. With the new Elasticsearch schema, the content of a document is stored separately from the metadata. Previously, the content and metadata were part of the same Elasticsearch document. When a document is updated in Elasticsearch, internally, this is equivalent to deleting the document and then creating a new copy which must be indexed again. This can be a compute resource intensive operation if your metadata changes frequently or you add a new metadata field requiring a metadata update for the entire index.

To help you get through the new index creation process quickly, there has been a significant focus on improving the performance of the reindexing tool in the Content Manager 10.0 client. It can now handle up to 100 parallel indexing tasks and can read directly from the document store file system without having to transfer files using the Workgroup Server. With the appropriate configuration and hardware, this should allow you to index hundreds of gigabytes of data per day.

See the [Technical Note on MySupport](#) which covers the Content Manager Elasticsearch configuration and indexing process <https://softwaresupport.softwaregrp.com/doc/KM03783153>.

New Features

Platform Continuance

Content Manager 10.0 introduces support for:

- Kofax 11 and 11.0 SP1
- IDOL, KeyView and Media Server 12.7

RDBMS support:

- Oracle CDB/PDB
- PostgreSQL 12

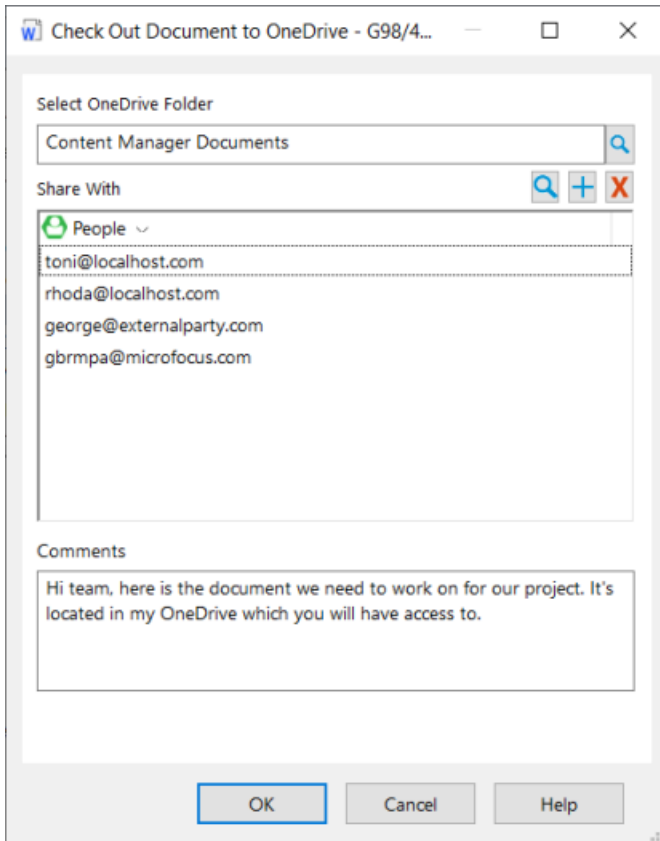
Content Manager Client

Theme: User Experience

Checkout to OneDrive

For organizations that use Microsoft's OneDrive and have configured Content Manager to enable access to this, users can now opt to check out their documents to OneDrive from a record's right-click menu.

Users can choose which OneDrive folder the document is checked out to, as well as select existing Content Manager locations, or include external email addresses, to share the document from their OneDrive with.



Once in OneDrive, the people the document was shared with can all access and update the document. The user who initially checked out the document is the person who must check the document back into Content Manager, this can be done via the client, the [zero footprint integration](#) or the Content Manager Web Client.

NOTE: If a document is shared from OneDrive, the details of those shares will not be captured in Content Manager against the record.

Search Forms

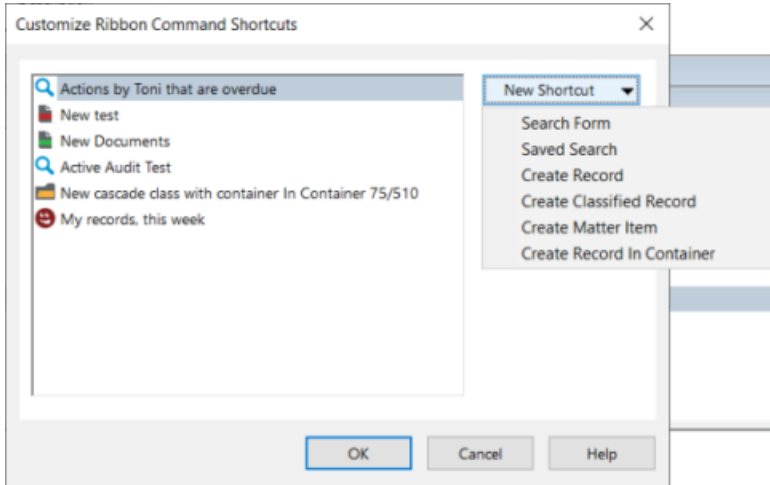
Previously we had introduced the ability to create unique multi-field search forms to suit a variety of business needs that were pushed into the Content Manager Web Client to improve users searching options.

In this release, the use of the Search Forms has been extended to be able to use them within the Content Manager client.

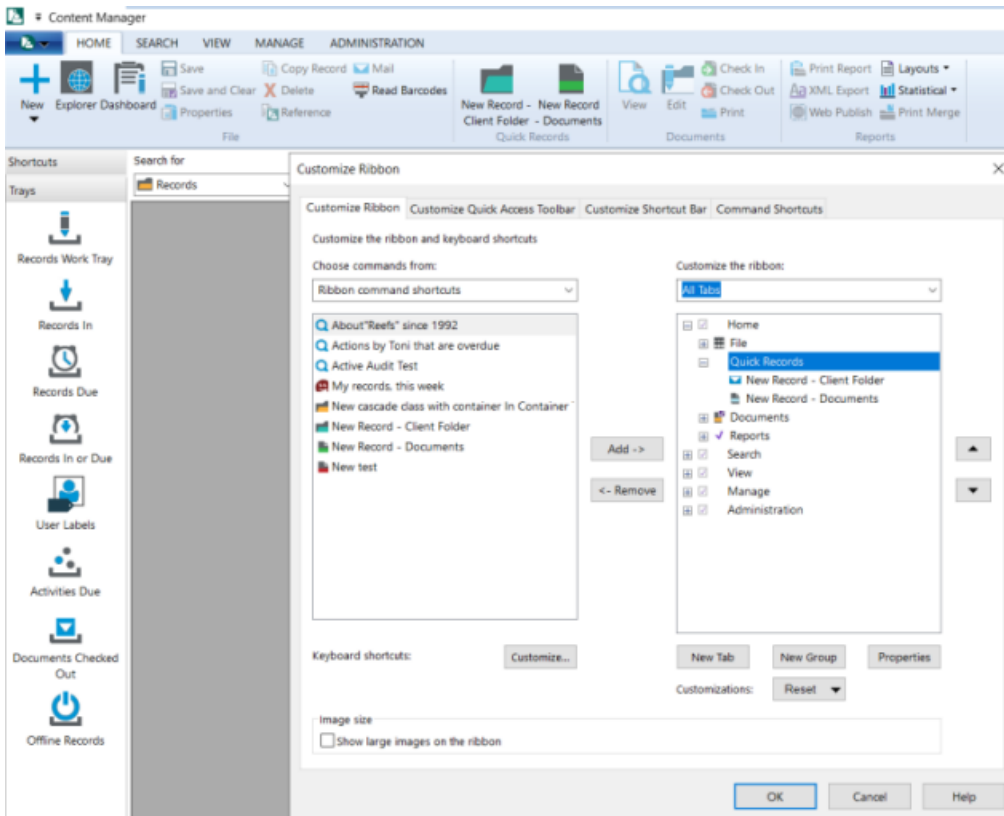
For Search Forms that are created for objects that have a "Search" option on the Search tab, in the Find group, a new menu has been introduced **Search Forms**. A limit of five Search Forms will be displayed as a sub-menu option. If the object type does not have a group search option, these Search Forms can be added to the Content Manager Ribbon as a [Custom Command](#).

Custom Ribbon Commands

The ability to add Custom Ribbon Commands has been introduced. From the Content Manager ribbon, users can opt to create specialized menu commands for a number of Content Manager objects.

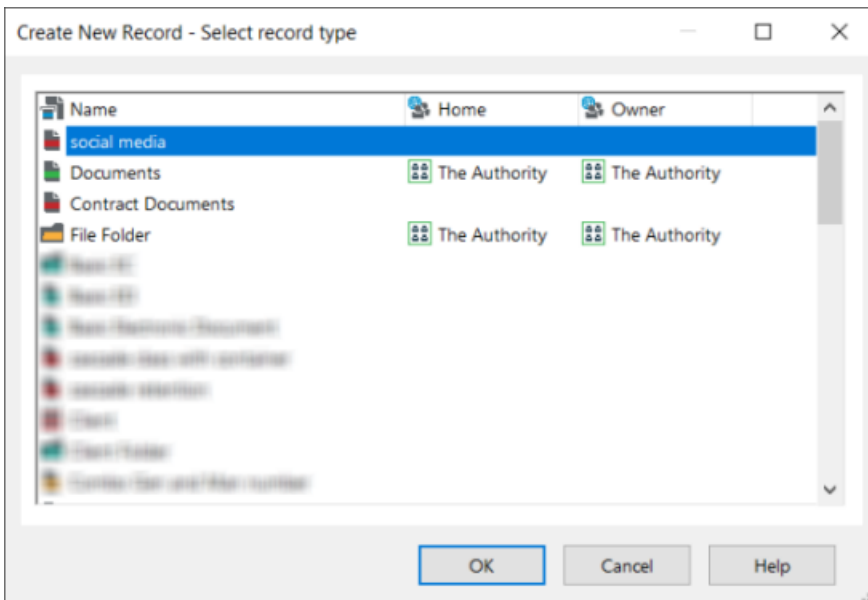
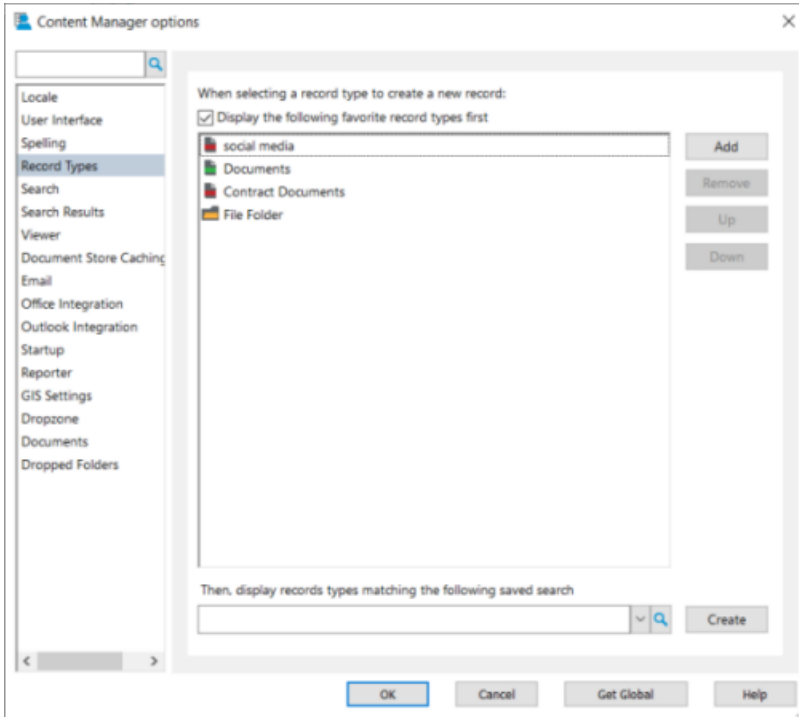


Once the Custom Command is created, it can be added to the Content Manager ribbon, to a tab and group to customize the look and feel of the ribbon and to allow for easier access to specific items in the dataset or to perform particular tasks, for example, adding a button to the ribbon to open the record entry for a defined record type, or adding a frequently used Saved Search or Search Form to the ribbon.



Record Type Display Order

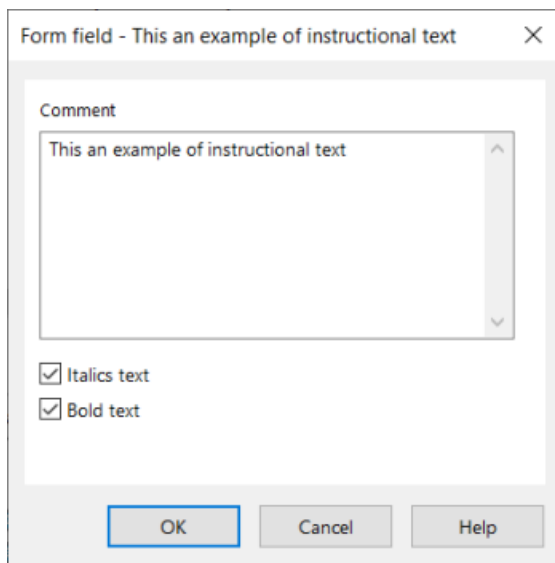
Many organizations have large numbers of Record Types defined in their datasets, but users tend to create records using a few of these. To improve user experience in the record creation process, the ability to customize the display order of Record Types has been added. A new page has been added to the **Content Manager options** dialog, **Record Types**, and from here users can select which Record Types will be displayed first whenever the Record Type list is displayed, e.g. record creation, rather than the default display ordered list.



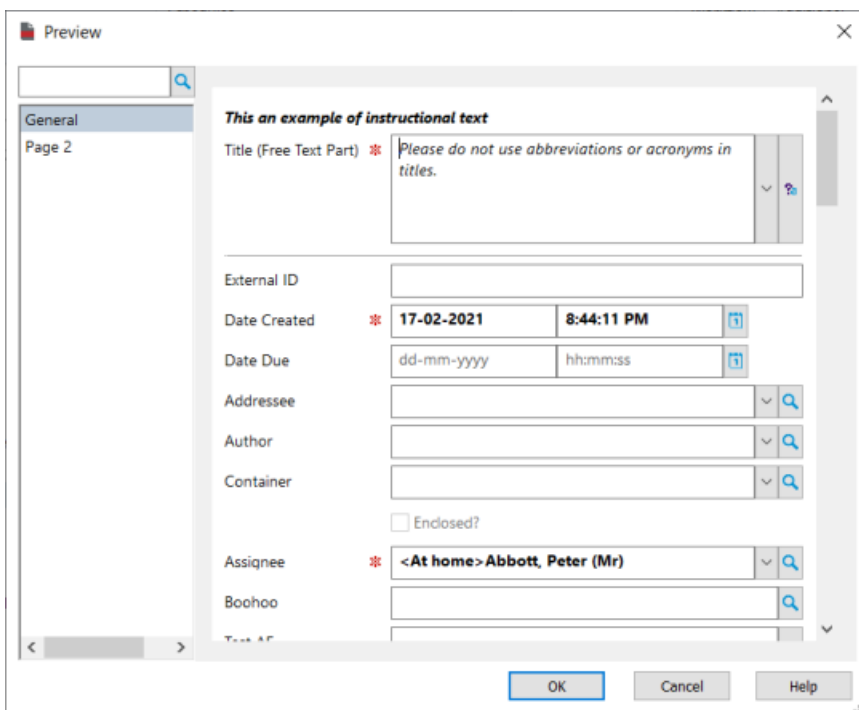
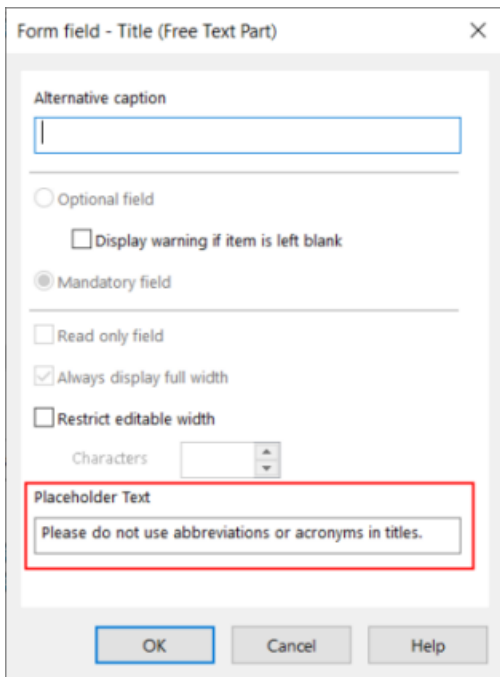
Ability to add Instructional and Placeholder text on a Record Entry Form

Administrators can add additional information to a record entry form which is displayed to the users creating records using these forms.

A new option, **Text**, has been added to the **Form** page of the Record Type properties. This option allows Administrators to add text to the record entry form adding additional information to the form, such as details on the kinds of records that are to be created using this form. It can be placed on the form as any other field is. The text can be formatted to be displayed in Italics or Bold, or both.



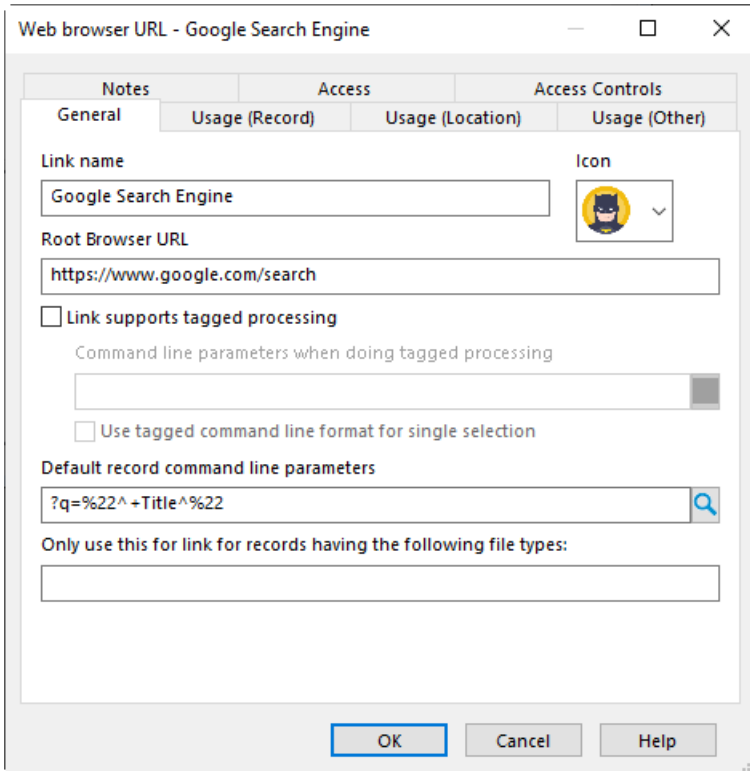
Fields can now have Placeholder text displayed within the field, similarly to the Instructional Text, Administrators can use this option to add additional information to the form on a particular field. Placeholder text is added to a field using the field **Properties** option.



External Links

A new type of External Link that opens a URL inside a Web Browser has been added to Content Manager. This enables users to be able to right-click on an object and send the parameters defined as a part of the External Link to a specified Web Browser URL, for example, run an Internet search on a record title, or a Location name.

The creation of External Links has been improved to more easily define which Content Manager objects the link can be used from, or with. Organizations can now also add Notes and Access permissions to External Links.



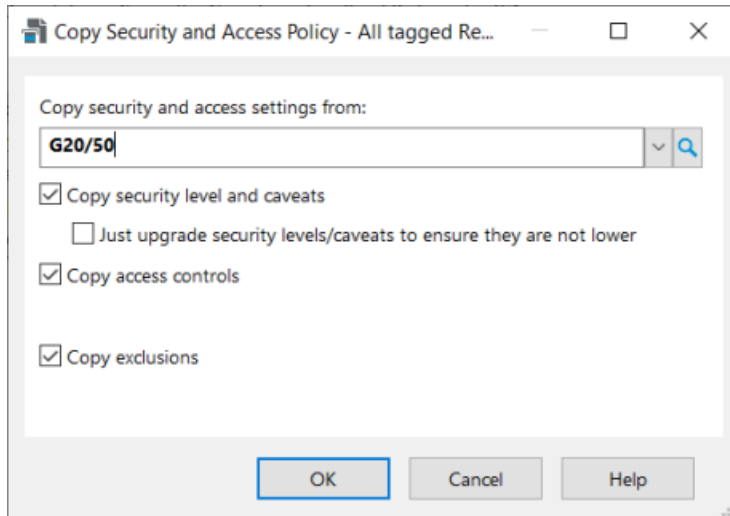
Organizations can now also write code to automatically register External Link add-ins.

External Icons

Organizations can now import .ICO files into Content Manager via the **Administration - External Icons** dialog. These will then be displayed in any icon lists displayed in the Content Manager Windows user interface, for example, setting the icon for a Record Type.

Copy Security

From the right-click Security and Audit menu, the Copy Security and Access Policy option allows the copying of the Security and Access Controls from the specified item to selected item(s) of the same object type. This new feature allows for an easier bulk application of a change in security and/or access control.



Theme: Lifecycle Management

New Record Type Behaviors

Two new Record Type behaviors have been introduced:

- Basic Electronic Container
- Basic Electronic Document

These behaviors have been designed to suit an archival use case where large quantities of inactive documents are imported into Content Manager primarily for the purpose of scheduling and disposal according to Records Management compliance rules. These inactive records have a much smaller metadata overhead as they are no part of any active document management process. A number of functions have also been removed from these records, such as, but not limited to, the setting of Home and Assignee Locations, applying Workflows or Action Tracking, adding relationships and updating with new revisions. They are also immediately marked as finalized as soon as they are created. This reduction of metadata overhead can decrease the overall processing time when performing destruction within a consignment designed specifically for “Basic record” disposal.

Server Side Disposal

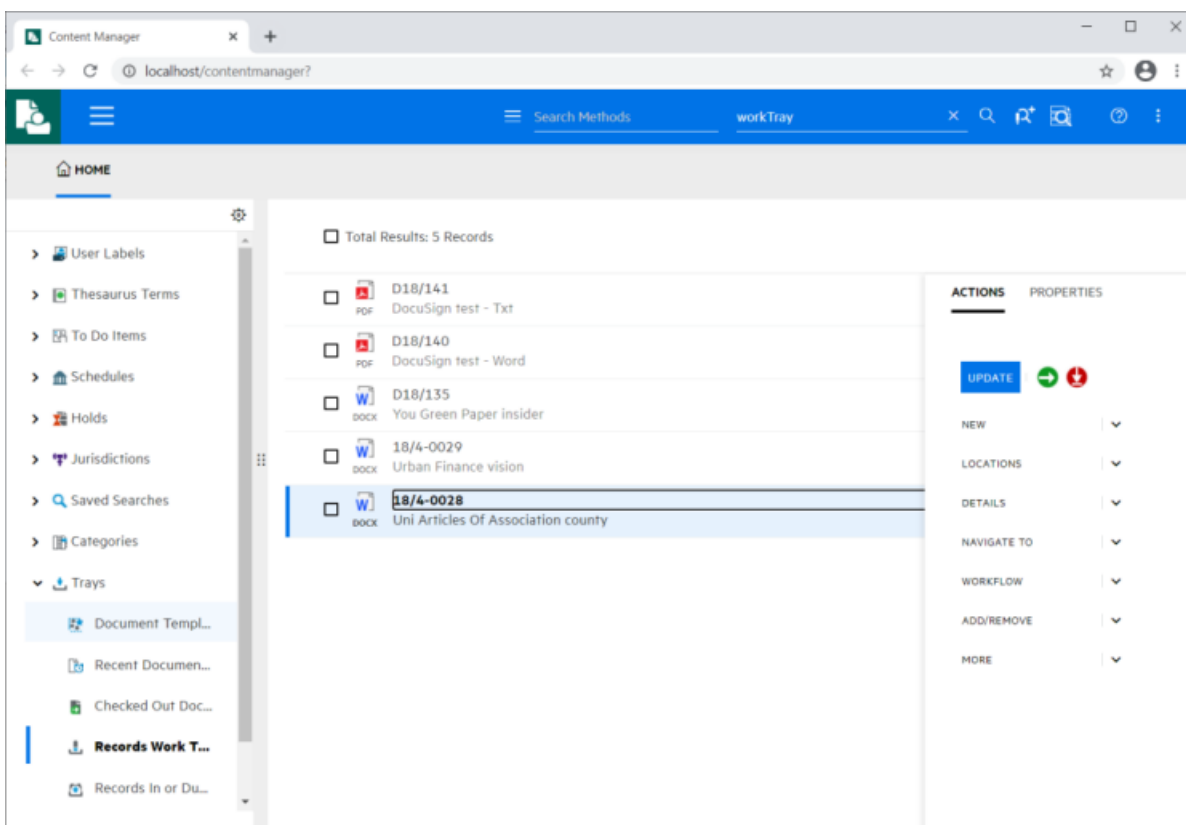
Alongside the introduction of the two new Record Type behaviors, improvements to the consignment processing options have been included to allow for consignments to only include records that have been created using the new Record Types, which would allow the disposal process to be run using bulk update techniques. Once a consignment is created, the processing can be done via the usual **Dispose** option on the consignment, or a **Consignment Disposal** option is now available on the **Administration** tab - **Disposal** group, which generates the required command line parameters and the Consignment Disposal Settings file required by [Command Line](#) tool which can be run on a different machine, such as a server.

Content Manager Web Client

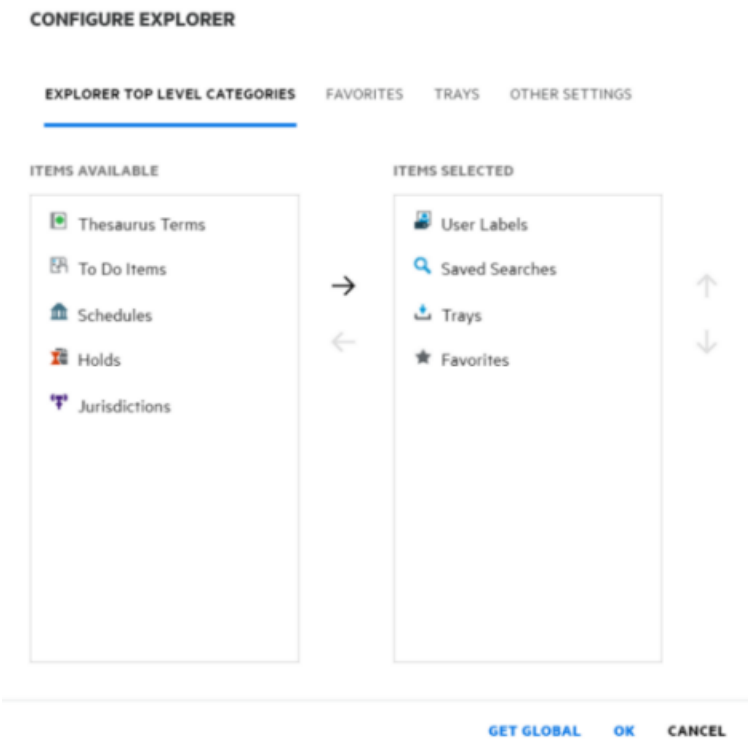
Theme: User Experience

Explorer Window

The Home page of the Web Client has been replaced with a record-centric Explorer window. This Explorer window allows users to view and action records associated with Content Manager objects, including Classifications, User Labels, Saved Searches, as well as those records that are associated with Content Manager Trays from a single page.

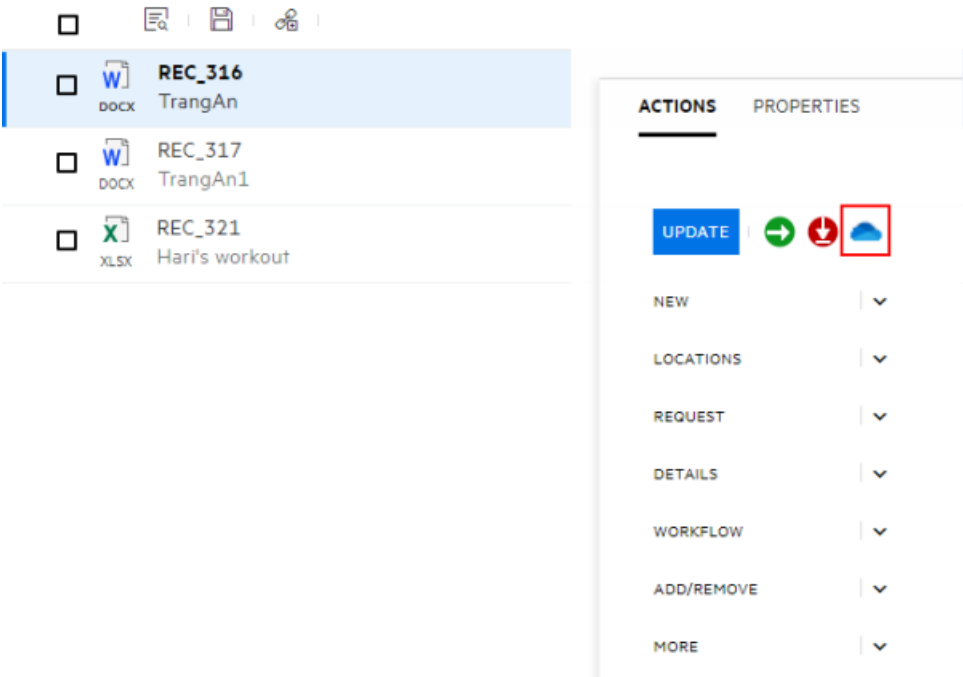


Users can customize the options that are displayed on this Home page, giving them the option to limit the displayed categories to those they work with regularly. Content Manager Administrators can also set these options as Global Settings in the Content Manager client, if required.



Check out to OneDrive

Organizations who are using OpenID to connect to Azure AD and M365/O365, now have the ability to check out, and check in, records from the Content Manager Web Client to OneDrive.



Microsoft Office Integration

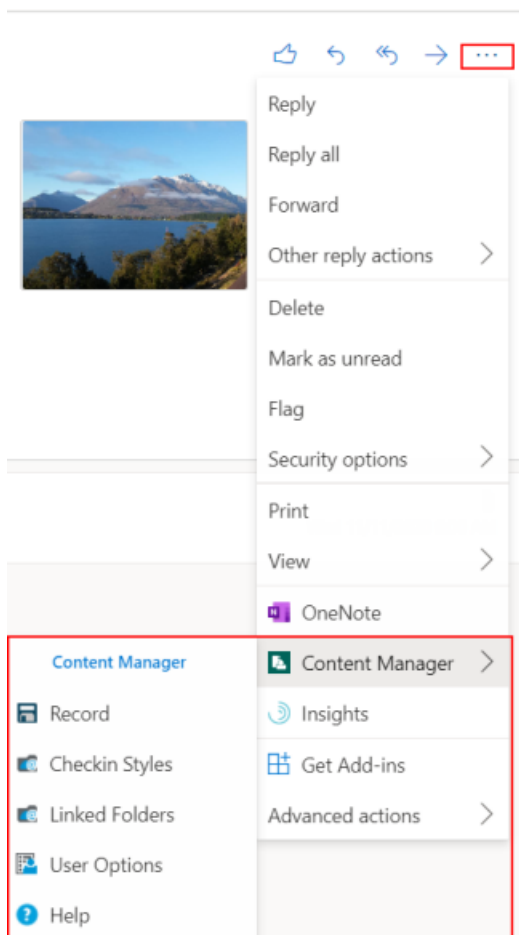
Theme: User Experience

Office and Outlook Online (M365) Zero Footprint Integration

A new zero footprint office integration has been developed for Content Manager. This integration allows organizations using M365/O365 Office Online applications to integrate to Content Manager, allowing for the check in, opening and editing of existing records.

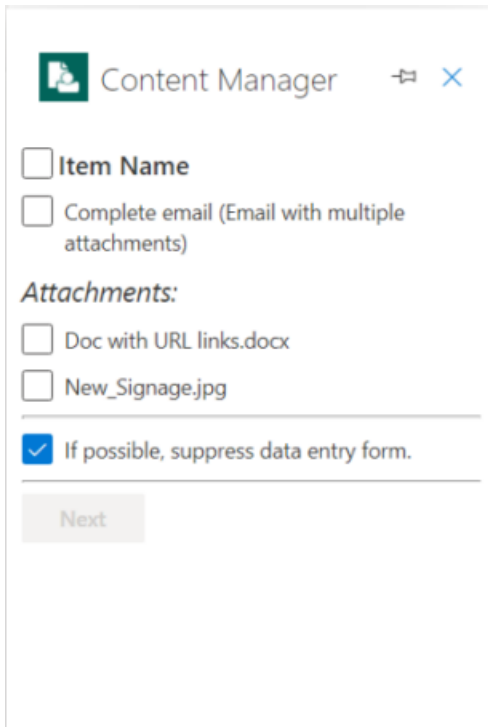
Outlook Integration

The Content Manager Outlook integration is accessible via the **More Actions** button on an email.



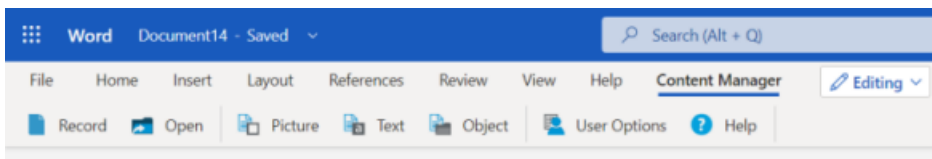
From here, users can opt to Check In their email using the **Record** option, or they can manage their **Checkin Styles** to set up specific check in behavior and **Linked Folders** to set up links between Outlook Online folders and Content Manager, as well as set defaults for their working preferences.

The user interface in the Outlook Online integration is a pop out task pane which can be pinned open for quick access.



Office Integration

The Content Manager Office integration options are available via the Content Manager tab in the Office Online ribbon.



The user interface is also a pop out task pane.

Content Manager Connect ✕

Document ▾

General Page 2

Title (Free Text Part)

Document14

External ID

Date Created

Tue Feb 16 2021 📅

Date Due

📅

Container

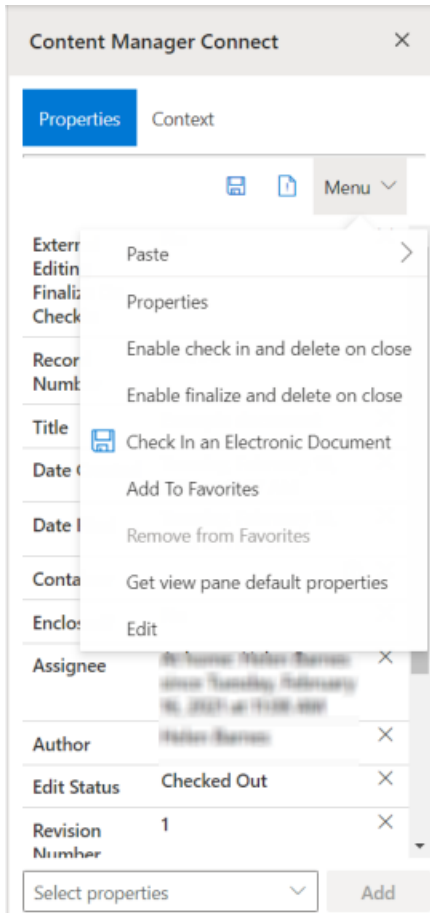
🔍 🔍

Assignee

🔍 🔍

Save

The Properties of a record are displayed in the task pane. The Properties pane also includes the options to complete actions on the record, including the ability to paste Content Manager metadata into the document, editing the record's metadata, add the record to the user's favorites and so on.



When opening Content Manager records via Office Online, these are opened and checked out to the user's OneDrive, where it will reside until the user checks the document back into Content Manager. A Content Manager reference file (TR5) 'stub' is created when a record is checked back into Content Manager and is removed from OneDrive as a part of the Check in process. This TR5 file in the Content Manager Documents OneDrive folder can be used to quickly open the record from Content Manager, open it in Office Online, checking the document back out to OneDrive.

From the zero footprint Office integration, users have the ability to request access to records that have been checked out by another user to their OneDrive. When a record is opened from the zero footprint interface and it's flagged as being checked out to another user, and that user has checked the document out to their OneDrive, the Open document dialog will be displayed, and when they click **Open**, they will be taken to the OneDrive of the Check out owner, advising that they need permission to access the item, and then allowing them to request permission for access. The Check out owner of the record will need to grant the requestor permission to the record in their OneDrive, from where the requestor will then be able to access and update the document as required. The Check out owner will be the only user who can check the document back into Content Manager.

DataPort

Theme: Total Cost of Ownership

Organizations now have the ability to import and export:

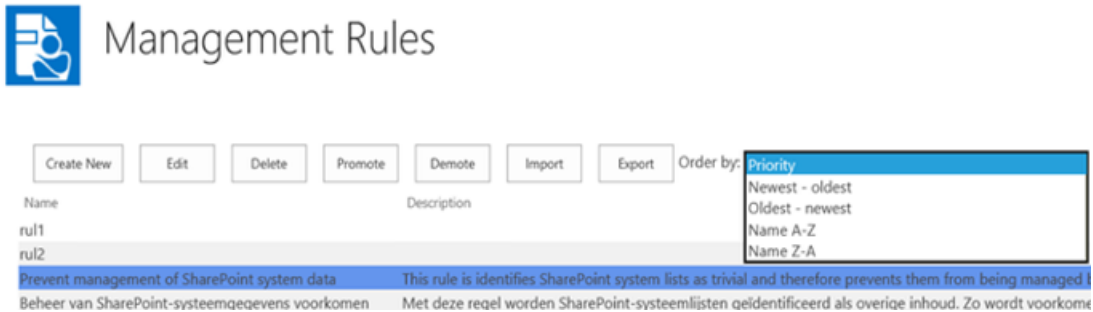
- Record Types
- Actions
- Renditions (as a part of the record import/export process).

Content Manager SharePoint Governance and Compliance

Theme: User Experience

Allow export/import of Management settings

The Content Manager SharePoint integration supports Importing and Exporting of Management Rules, Management Instructions, and Management Selectors. This will reduce the manual effort when multiple sites need to be configured with same kind of Rules, Instructions and Selectors.



For more details, see 9.2 *Content Manager Management Options* section in the *Content Manager Governance and Compliance SharePoint App: User Guide*.

Metric and reporting enhancement for all tenants

The new **CM Statistics Overview** page provides statistics of the SharePoint items for sites and sub-sites.

You can access the **CM Statistics Overview** from the **Content Manager app** start page. Navigate to **Content Manager app start** page > **Default integration settings** page, scroll down to **Monitoring** section and click **CM Statistics Overview**.

Monitoring

The pages in this section can be used to monitor the management of content by Content Manager

The 'Job Queue' allows access to pending, running, failed and historical jobs.

The 'Job Queue Settings' allows to configure Job Queue related settings.

Site auditing allows viewing the audit history for this site.

Site Collection auditing allows viewing the audit history for the whole site collection.

CM Statistics Overview allows viewing total number of documents processed in to Content Manager.

[Job Queue](#)

[Job Queue Settings](#)

[Notification Settings](#)

[Site Auditing](#)

[Site Collection Auditing](#)

[CM Statistics Overview](#)

The **CM Statistics Overview** page lets you view the number of SharePoint items managed, relocated, archived, finalized, and exposed. You can also view the status of the CM SharePoint integration service and the Content Manager app.

For more details, see *21 Content Manager Statistics* section, in the *Content Manager Governance and Compliance SharePoint App: User Guide*.

Support SharePoint Online versioning

The **Capture all Versions** option helps you determine whether all the versions of a document are captured by Content Manager or just the latest version.

To access the **Capture all versions** option, navigate to **Content Manager default integration settings** page > **Management options** section.

Management Options

Capture all versions

When documents are managed by Content Manager, you can choose to capture all versions of the document in SharePoint as revisions on the record in Content Manager, or you can elect to only capture the latest version. Use the "Capture all versions" check box to specify the behavior.

For more details, see *5.1.7 Management options* section, in the *Content Manager Governance and Compliance SharePoint App: User Guide*.

Add Azure Client AD entries through Tool

For SharePoint online, the **Configuration Tool** supports two new fields – **Azure Client ID** and **Tenant ID** – for configuring Azure AD authentication.

App ID:
[GUID]

App deployed to Office 365

Client Secret:
[Client Secret]

Azure Client ID:
[Azure Client ID]

Azure Tenant ID:
[Azure Tenant ID]

App deployed on premise

Client signing certificate (.pfx) [Browse]

Client signing certificate password:
[Password]

Issuer ID:
[Issuer ID]

Configure App

Configure Close

For more details, see *4.2 Using Configuration Tool* section in the *Content Manager Governance and Compliance SharePoint App: Installation Guide*.

Ability to handle Job Queue setting for tasks

The new **Job Queue Settings** page provides options to SharePoint administrators to configure job queue related operations based on the requirement.

You can access the **Job Queue Settings** from the **Content Manager app start** page on any site where the Content Manager Governance and Compliance app has been added. Navigate to **Content Manager app start** page > **Default integration settings** page, scroll down to **Monitoring** section and click **Job Queue Settings**.

Monitoring

The pages in this section can be used to monitor the management of content by Content Manager

The 'Job Queue' allows access to pending, running, failed and historical jobs.

The 'Job Queue Settings' allows to configure Job Queue related settings.

Site auditing allows viewing the audit history for this site.

Site Collection auditing allows viewing the audit history for the whole site collection.

CM Statistics Overview allows viewing total number of documents processed in to Content Manager.

[Job Queue](#)

[Job Queue Settings](#)

[Notification Settings](#)

[Site Auditing](#)

[Site Collection Auditing](#)

[CM Statistics Overview](#)

The **Job Queue Settings** allows you to handle jobs once the CM Governance App is removed or uninstalled, set the clean-up threshold limits, and delete jobs by specifying their ID(s).

For more details, see *20.3 Job queue settings* section, in the *Content Manager Governance and Compliance SharePoint App: User Guide*.

Support MS security Model changes for O365

SharePoint Integration - 'Everyone' claim Term Store requirement

When granting permissions to a term store group, to avoid using **Everyone** claim and to prevent end-users from accidentally sharing content with guest users in their SharePoint Tenant, you can add specific user(s) to the **Contributors** section.

The screenshot shows the 'GENERAL' tab of the 'Content Manager (XX)' configuration page. It includes fields for 'Group Name' (Content Manager (XX)), 'Description', 'Group Managers' (Administrator), and 'Contributors' (spadmin; spadmin). The 'Contributors' field is highlighted with a red box. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button also highlighted by a red box.

For more details, see *3.2.4 Creating Content Manager term sets* section and step on *Granting permissions to a term store group of Working with the term store* section in *Appendix C: SharePoint administration tasks* in the *Content Manager Governance and Compliance SharePoint App: Installation Guide*.

Graph API Support

The Content Manager SharePoint integration supports Microsoft Graph API.

Content Manager Infrastructure

Theme: Total Cost of Ownership

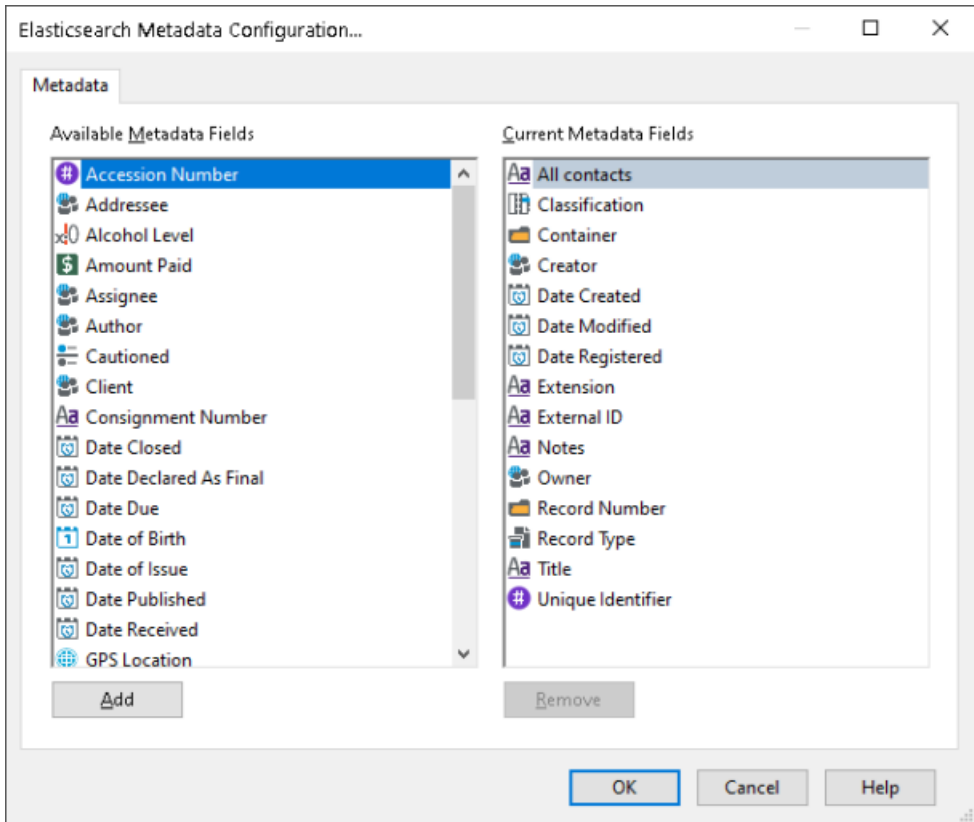
Elasticsearch Capabilities

Dynamic Schema

Elasticsearch indices used by Content Manager are now created with a "dynamic schema". Record metadata fields can be mapped to an Elasticsearch index and the index is updated as they change. This will allow you to construct metadata and electronic document content searches in the Content Manager Client that can be resolved entirely by the Elasticsearch service. This may improve combined metadata and content search performance.

To access this feature and configure the fields to be indexed, from the **Administration** tab in the Content Manager client, in the **Elasticsearch Index** group, click **Metadata**.

When this dialog is first accessed, the Current Metadata Fields column will display the default metadata fields which are always stored in the Elasticsearch index. The Available Metadata Fields column shows all additional metadata fields that can be added to the Elasticsearch schema. Once these fields have been added, they cannot be removed from the index. If previously added metadata fields need to be removed, the index must be deleted and a new index created. For new Additional Fields, they will only be visible in the Available Metadata Fields column once they have been associated with a Record Type.



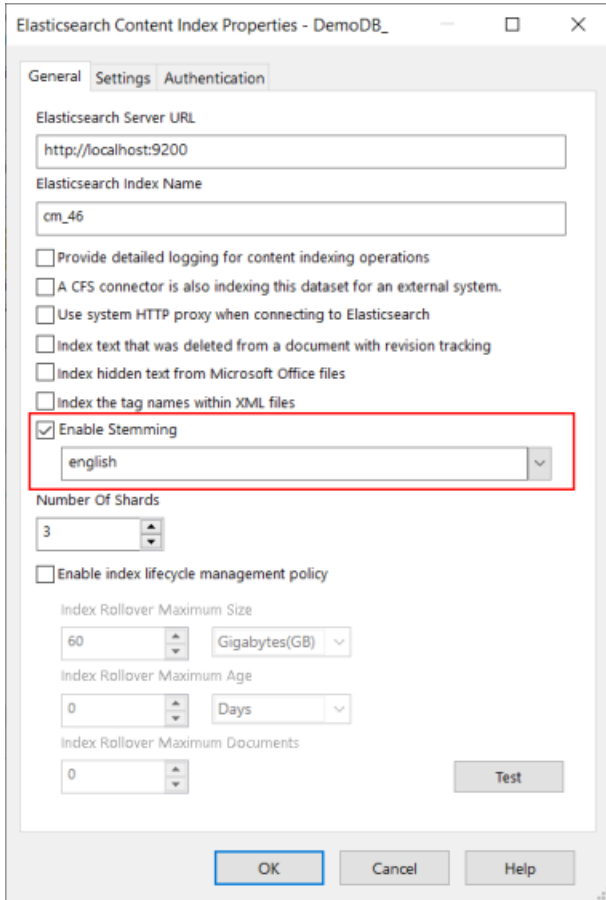
In order to resolve a search containing both content and metadata fields entirely in Elasticsearch, the **Search Optimizer - Usage of content engine for search optimization** option **Use content indexes where possible** should be selected.

Elasticsearch Stemmer

You can now select an Elasticsearch stemmer that is appropriate for your index. By default, this option is not enabled. When the **Enable Stemming** option is enabled the default stemmer applied is **english**. To ensure the return of more relevant search results, select a stemmer that matches the language used in the majority of records and documents.

A custom stemmer can also be entered by typing its name in the option box. However, you should ensure the stemmer you enter is supported by the version of Elasticsearch you will be using.

This option will be disabled after the index is created and it cannot be changed without deleting the index and re-creating it.



Elasticsearch Lifecycle Management Policy

Content Manager now supports Elasticsearch index Lifecycle Management Policies.

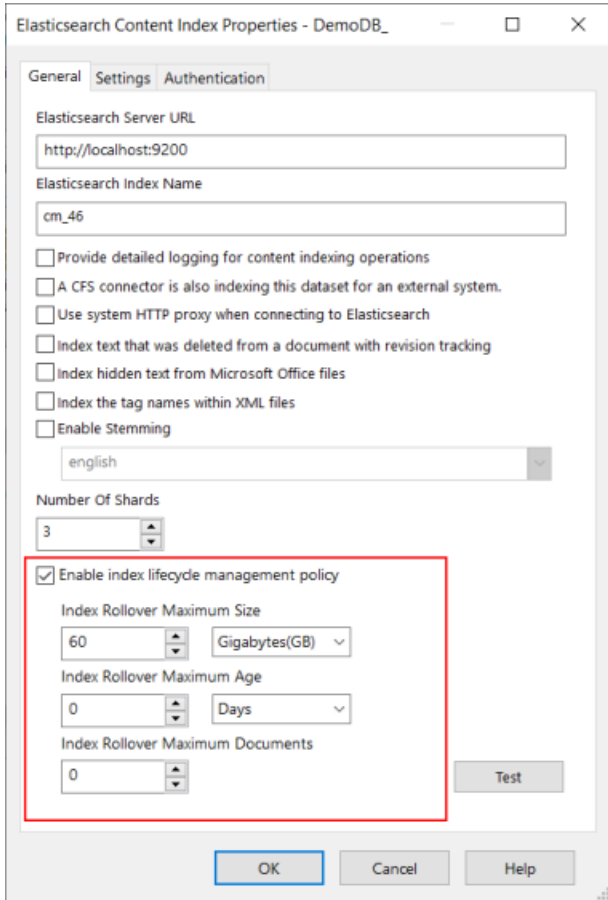
When you enable this option in Content Manager Enterprise Studio, an index will “rollover” to a new index when a specified condition is met such as index size, number of documents, index age. This is useful in large environments that are ingesting large amounts of new content. If you don’t expect the size of your index to exceed 50GB, it is recommended not to enable index lifecycle management.

If this option is not set, your index has the potential to reach a theoretical maximum at which point the Elasticsearch index will report errors such as, shard size exceeds 50GB.

Using a lifecycle policy based on index size allows you to keep the shard size under 50GB and grow your content index over time.

The most common option is to rollover indices based on size as it allows organizations to predict and provision future storage requirements.

The Lifecycle Management Policy and index rollover size cannot be changed using this dialog after the index has been created and the fields will be disabled.



SQL Text Indexing

In earlier versions, Content Manager used its own “word indexing” algorithm for splitting up text metadata such as Titles and Notes to allow searching by individual words contained within the text. With larger databases this design was becoming stretched and new method has been added in this release. This new method utilizes the inherent text indexing capabilities of the underlying Database Management System (Oracle, SQL Server or PostGres) to perform this function. Utilities are provided in Enterprise Studio for maintaining this index (very similar to the previous Content Manager Word Indexing functions) and it works largely identically to the existing word indexing. The SQL Text Indexing approach provides a significant performance benefit over the previous approach.

Metadata Aggregation

A new class has been added to the Content Manager .NET SDK to support data aggregation for statistical purposes. This class will format SQL aggregation queries to produce high performance statistical counts, faceted over a number of different properties. This feature will allow developers to pull together aggregated record data from Content Manager and push to a presentation layer of the developer’s choice.

Support for OpenID Authentication

The OAuth authentication feature has been extended from previously only supporting Active Directory Federation Services (ADFS), Azure AD and Google Apps, to supporting any OpenID Connect-compliant authentication provider. This includes ADFS, Azure AD and Google Apps, but also many other third-party authentication providers such as Okta and Ping Identity.

Support for ADFS WAP Pre-authentication

For customers who have deployed Content Manager workgroup servers behind an Active Directory Federation Services Web Application Proxy (ADFS WAP) instance, authentication for Content Manager can now be configured in ADFS WAP to use either pre-authentication or pass-through authentication. Usage of the pre-authentication option allows authentication to be handled directly on the ADFS WAP instance, rather than on workgroup servers.

Administration Tool

This application has been designed to allow system administrators to restrict access to certain Content Manager utilities that were previously exposed in TRIM.exe. It is designed for cloud deployments where these "restricted" utilities would be far better operated from within the Cloud environment.

This application, **TRIMAdmin.exe**, installed as a part of the CM_Server_x64.msi, is located, by default, in the same installation folder as the other Content Manager binaries and is accessible from the Content Manager directory from the Windows Start menu, or by using the shortcut that is installed to the desktop.

This new feature is disabled by default, to enable this uncheck the Include system administration functions in the main windows client (trim.exe) on the **Content Manager Enterprise Studio - Options** dialog, **Other** tab.

When this option is not enabled a number of the System Options, such as Web Services, Events, Storage, as well as others, will only be accessible via the Content Manager Administration tool. Other System Options such as Features, Security, Notifications, as well as others, will be accessible in both clients but with different options available. For details on where the options are available when choosing to use this Administration client, see the *Content Manager Enterprise Studio Help > Dataset setup and maintenance > Content Manager Administration client*.

Command Line Tool

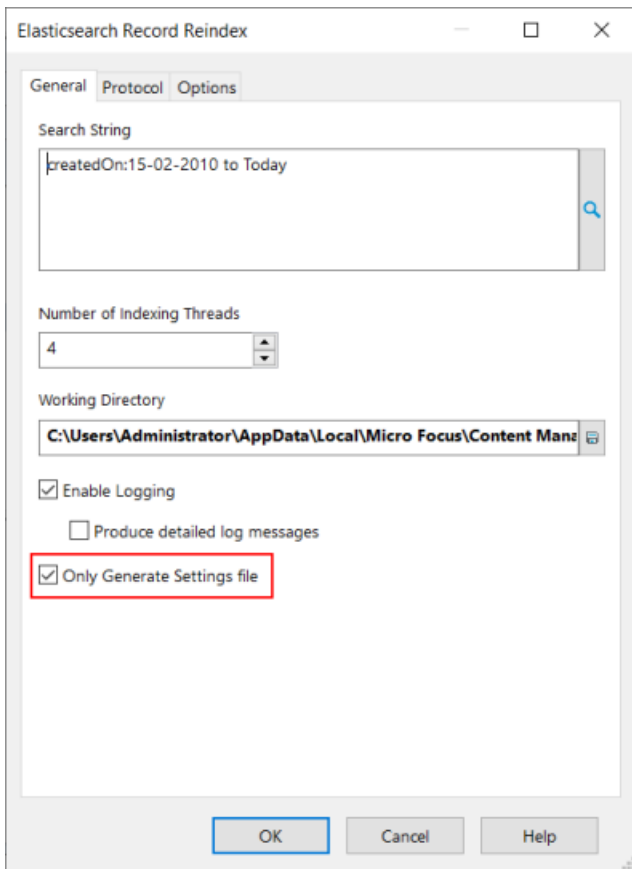
New command line functionality has been introduced to help those customers who wish to automate the management of Content Manager using scripting tools. This tool is located in the same installation folder as the other Content Manager binaries and is called **TRIMAdminCmd.exe**

The Content Manager administration command line tool allows the administrator to use a command line interface to perform some tasks that previously required direct access to a user interface. These commands can also be run remotely using common scripting tools.

For example, an Elasticsearch reindexing operation can be run using the following command line:

```
TRIMAdminCmd.exe --cmd elasticReindex --settings <path_to_settings_file>
```

The settings file can be generated and saved via the reindex user interface or by using the `--createSettings` option.



Progress can be monitored via the console or by directing output to a log file.

The command line tool has built in help, which will display the available options. The current list of supported processes that can be run via the command line tool are:

- Elasticsearch reindex
- IDOL reindex
- Document Store Integrity check
- Document Store Incremental check
- Directory Synchronization
- Consignment Disposal processing

Enhanced Features

Content Manager Client

Theme: User Experience

Extended use of the Navigational panel user interface

In Content Manager 9.4, the user interface of a number of dialogs were changed from a tabbed dialog to having a navigational panel style dialog. The use of this navigational panel style has been extended, and now includes:

- Multi-page record entry forms
- Record Properties page
- Classifications
- Locations
- Workflow Activity Properties and Workflows (excluding Workflow Templates)

As a result of this new user interface, on some Content Manager objects, new pages have been added to the Properties of objects, for example, in Locations, the Profile tab options have been split into **Network Login** and **Profile**.

There have also been some additional pages added to **System Options - Container, Disposal** and **Dates and Times** pages; as well as **Record Types** with the addition of the **Borrowing** page. While these options were already using the navigational panel user interface, the new pages have been added to improve useability by reducing the number of options on pages.

Changes to Record Types

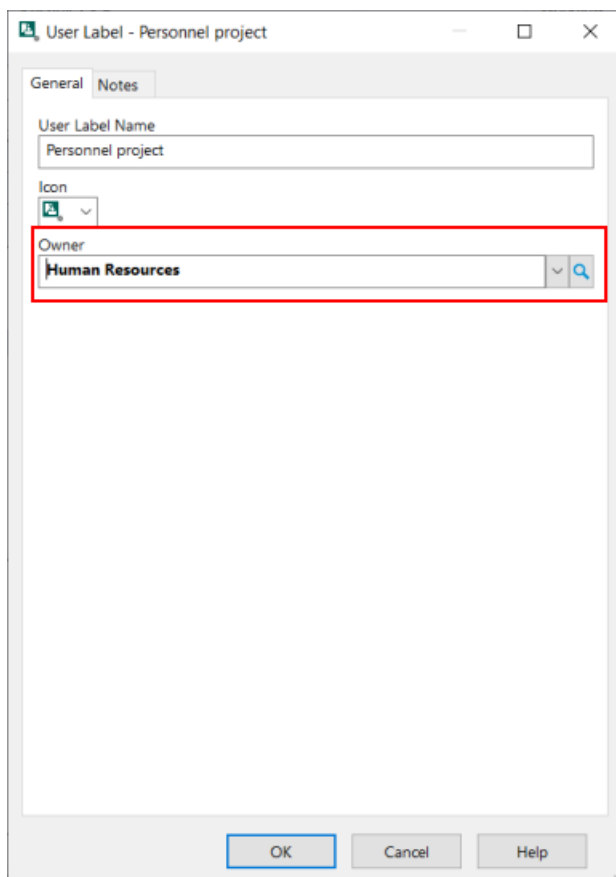
Some enhancements have been made to the Record Type creation processes. In the past, options that were not relevant to the Record Type were still visible on the Record Type creation form. As different Record Types have different requirements, now, not all options will be available. If a particular product Feature is not enabled and there are specific Record Type options that relate to that Feature, these will not be displayed on the Record Type properties pages. For example:

- Basic Electronic Container and Basic Electronic Document Record Type do not have the options to set Default Home or Assignee Locations on the Defaults page, nor are the Workflow/Actions, Automatic Sub Folders and Physical LM pages available. Records created using these two Record Types cannot have Revisions created for them, and they will be finalized on creation.
- Record Types that do not support electronic documents by default, i.e. Folder (Paper Only), Client and Matter Record Types, do not have the Electronic, Metadata Capture or Electronic LM pages available.

- The Borrowing and Containment pages are not available for Client, Matter or the two Basic Electronic Record Types.
- The two Basic Electronic Record Types and the Record Types that do not support electronic documents by default, do not have the Document Review page available.
- If the Feature **Client/Matter Legal Structure** is not enabled you will not be able to create Client or Matter Record Types.
- If the Feature **Space Management** is not enabled the option Home can be a space is not available on the Defaults page.

Ability to share User Labels

Improvements around sharing User Labels has been made. The concept of an **Owner** has been introduced to the User Label properties. The **Owner** can be set to Person type Location to make it accessible by only them or it can be set to a Group/Organisation type Location to make it accessible by all users who are members of that Location (and are a part of the required Access Controls). This field is available to user's who have the **Can Manage User Labels** permission.

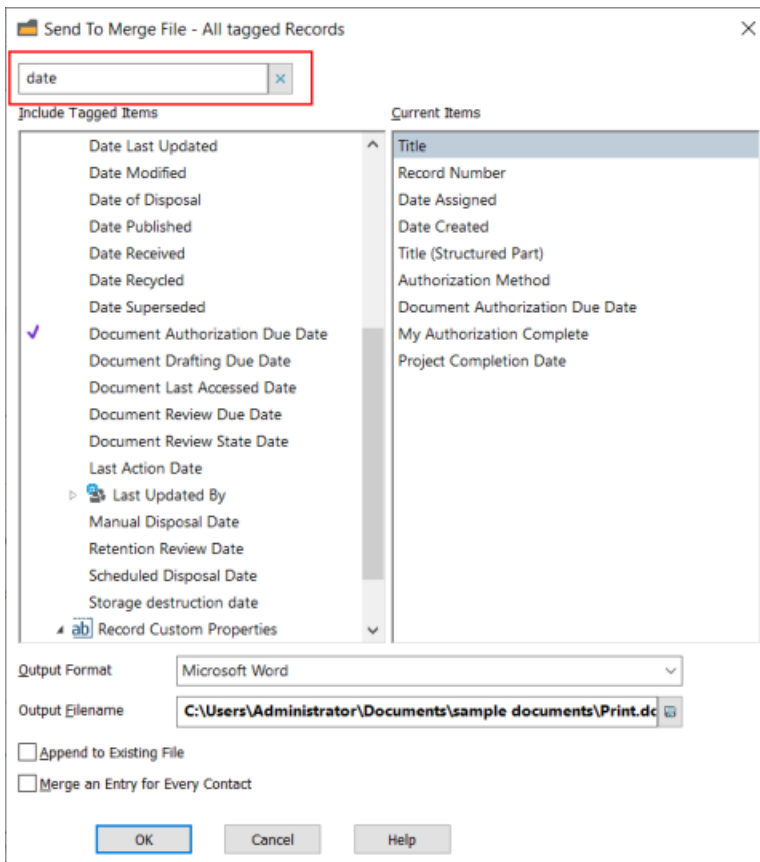


Action Tracking

Once a Procedure or Action has been attached to a record, if required, users can now suspend the step (s) until a defined date. The Status of the Action will show it's been suspended.

Search options for Print Merge and Web Publisher Reports

When creating Print Merge or Web Publisher Reports, users can now search for the fields they want to include on their reports, displaying a refined list of available fields matching the search word(s).



For Print Merge reports, with the inclusion of the Current Items column, it is much easier to see which fields are associated on your report.

Email "Send To" Templates

Organizations now have the ability to customize the **Send record to mail recipient** template used when a user right-clicks on an object and clicks **Send To - Mail**. This new template option allows organizations to apply particular Content Manager parameters to be included in the emails sent from Content Manager, using Outlook.

Explorer Window

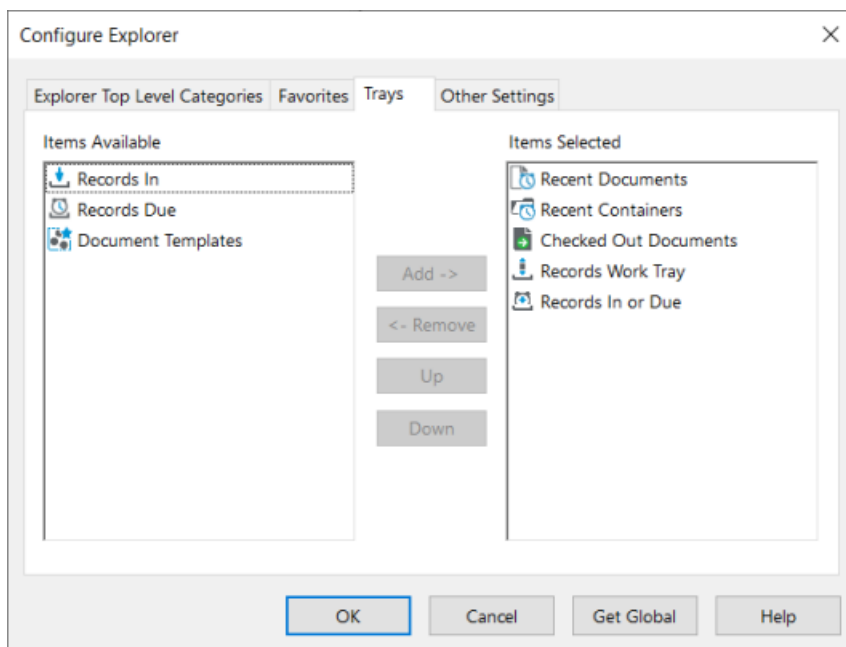
The Explorer window was introduced in Content Manager 9.4. In this release, the functionality and use of Explorer has been enhanced and extended.

Explorer Configuration and settings

Users can now additional configuration options, allowing them to set up their Explorer window to suit their own working views.

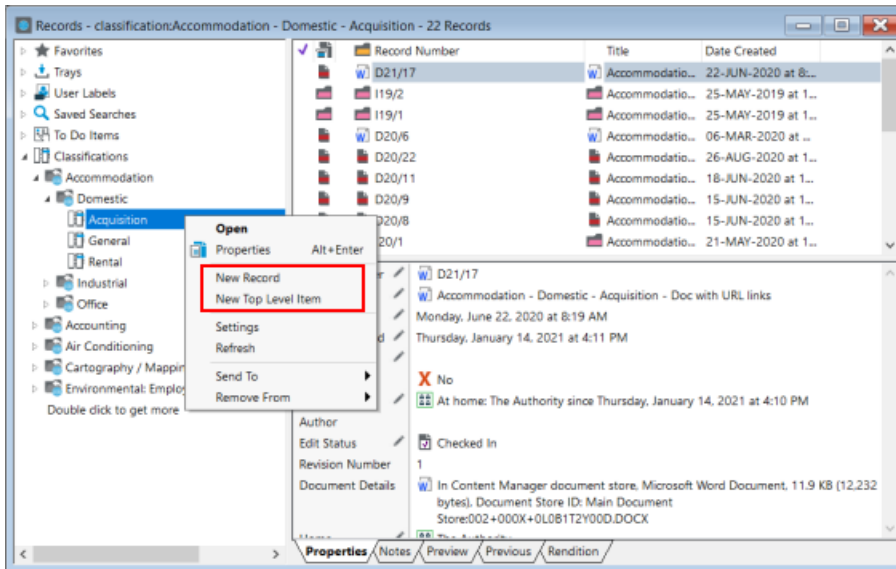
They now choose which:

- Top Level Categories to display
- Favorites options to display
- Trays to display
- The number maximum number of items to display



Ability to create records and new objects from Explorer

For users with the required permissions, they can now create new records from a selected object in the Explorer window, as well as new objects for selected objects, such as Classifications and User Labels.



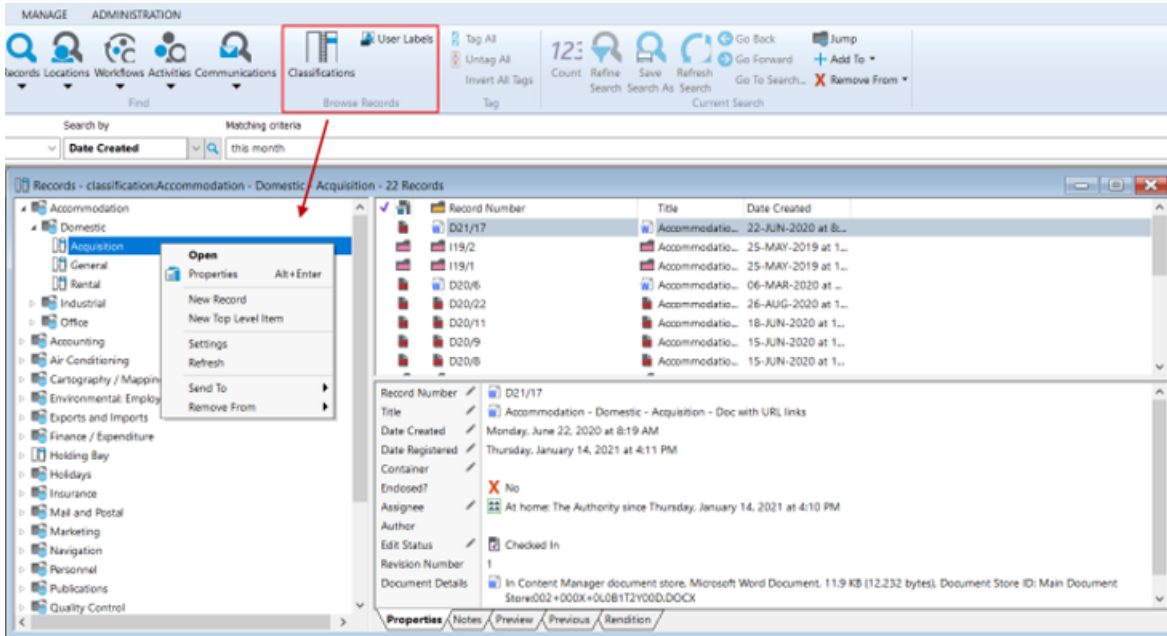
Send to and remove from

The Send to and Remove from options have been added to the Explorer window right-click menu. Users can now create Content Manager Reference (TR5) files from selected items, add and remove supported items to their Favorites, and as well as adding and removing supported items to User Labels.

Replace Browse via view with Explorer view

The use of the Explorer user interface has been extended to replace the previously used "Browse" window, for example Browse via Classifications. From the **Search** tab, in the **Browse Records** group, these options will now display using the Explorer window.

NOTE: For users who prefer to use the "Browse" view for their Favorite Classifications (accessed from the **Manage** tab - **Classifications** menu) there is a new **User Option - User Interface - Use Explorer Browser for Favorite Classifications** which will display the favorite Classifications in the "Browse" view.



Ribbon and Shortcut bar Enhancements

The use of the Shortcut bar has been extended. A new 'tray' option **More** is now available. This new tray includes options that were previously included in the **Trays** Shortcut bar, such as Dashboard, Check in Styles, Consignment Approvals, To Do Items.

The **Browse** group in the **Search** tab has also been modified. The options **To Do Items**, **Check in Styles**, **My Consignments** and **Consignment Approvals** are now all accessible from the **More** tray in the Shortcut ribbon.

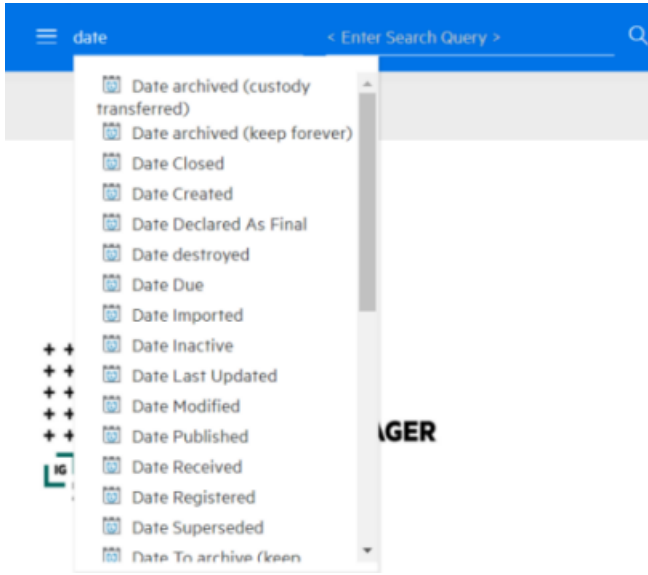
Content Manager Web Client

Theme: User Experience

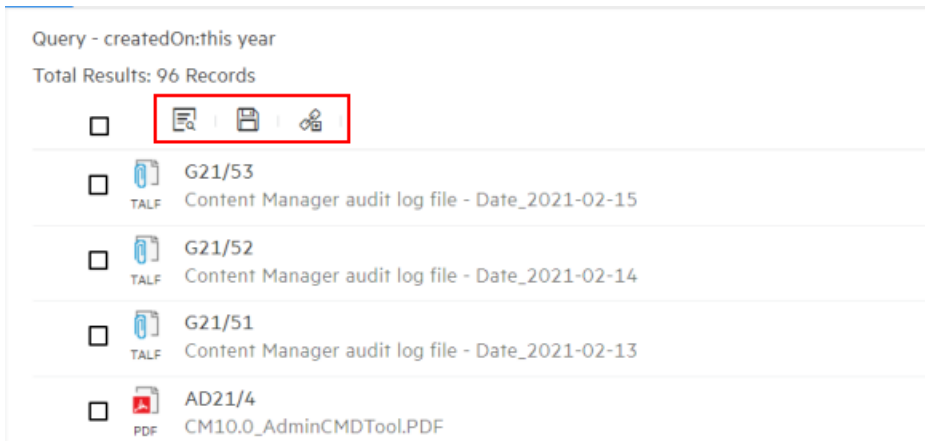
Searching Enhancements

A number of enhancements have been made to the searching experiences in the Content Manager Web Client.

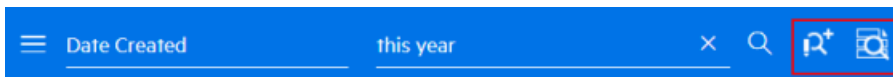
In previous releases, to run searches with the Quick Search option, users had to have knowledge of the search methods available. In this release, a searchable **Search Methods** field in the Quick Search option has been included. By typing a word into this field, a list of matching Search Methods will be displayed. The user can then select the required method and type in their search query.



Searches can now easily be refined in the context of the search results list. A new option, **Refine Search**, is now available on the search results page and this will open the Search Editor dialog, allowing users to update their search criteria, refine their filters and sort options all from a single dialog. Also included with the **Refine Search** option, is an option to save the search, again, within easy access and in context with the search results list, as well as the **Copy URL** option.



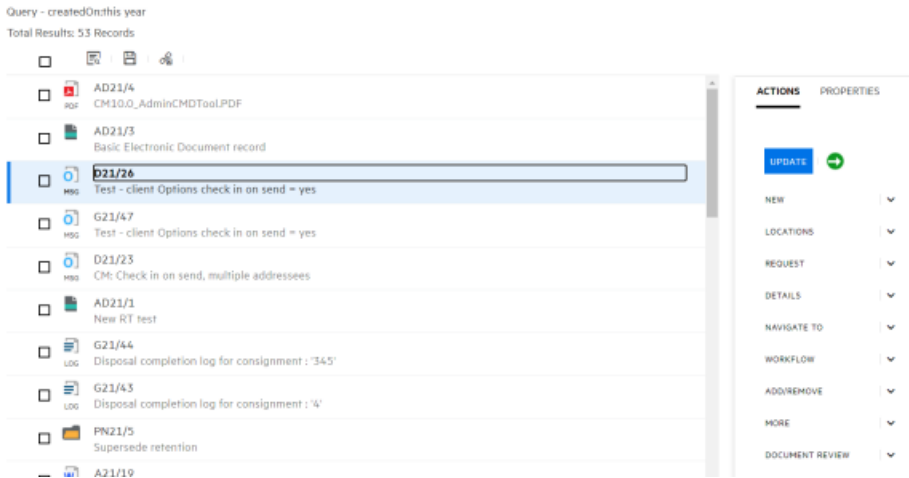
Part of the redesign of the searching options was to also move the Search Editor and Search Forms options to a more easily accessible area. These are now available as buttons on the Search masthead.



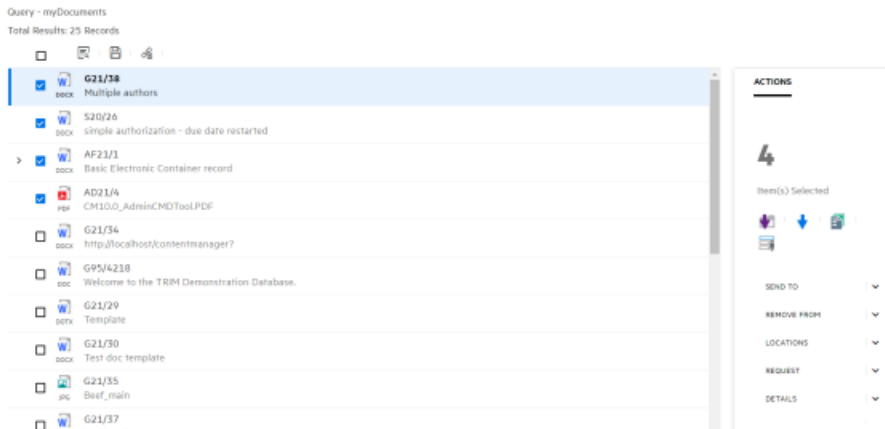
Update Actions Enhancements

To allow for more items to be included on a search results list, the Action update options have been moved out of the search results list into a dual purpose **Properties** panel.

When an item is selected, the panel will be automatically displayed with two tabs, **Actions** and **Properties**. The **Actions** panel options will allow users to update metadata for the selected item(s). To close this panel, re-click on the selected item.



If multiple items are selected, then the panel will open with just the **Actions** tab available.



Microsoft Office Integration

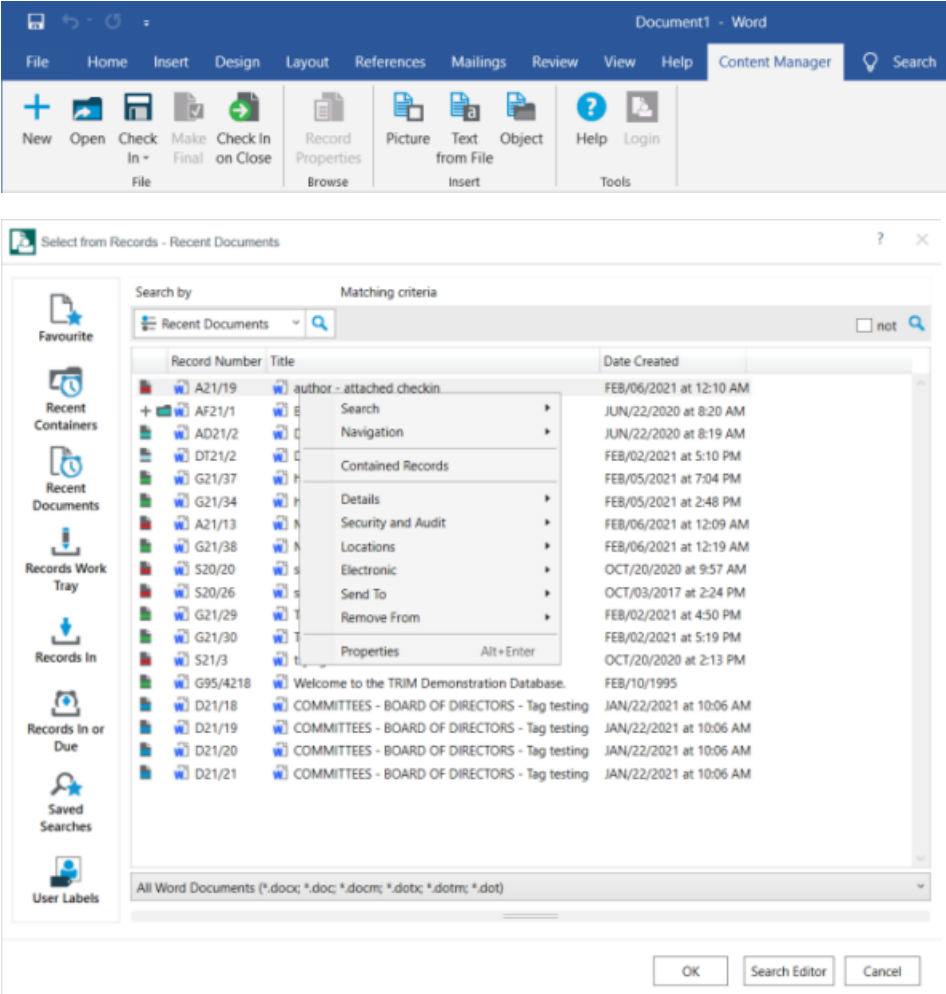
Theme: User Experience

Consolidation of the Office and Outlook integration User Interfaces

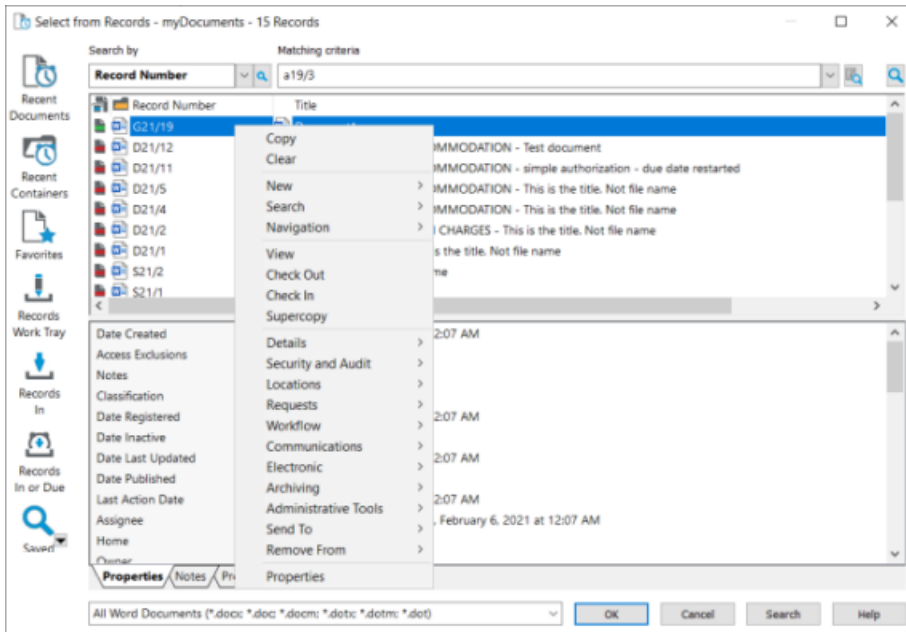
In previous releases, Content Manager has had two user interfaces in regards to the Office and Outlook integrations. One, the desktop integration, used the native Content Manager controls to provide the user interface, and the 'thin' integration which used the Windows Presentation Foundation (WPF) to provide the user interface. These two interfaces have now been consolidated into a single interface, using the Windows Presentation Foundation (WPF).

This single user interface provides like for like functionality in regards to options available on the Content Manager tab, but the users of the desktop integration will notice some look and feel differences

on the dialogs, as well as some changes to available options such as the search options, and the right-click menu options, but the functionality of these available options will be familiar.



Content Manager 10.0 Office Integration - Open records dialog and right-click menu options



Content Manager 9.4 Office Integration - Open records dialog and right-click menu options

IMPORTANT: Those organizations that had opted to use the 'lightweight' user interface in the desktop integration in 9.4 and earlier, please note as there is now only a single user interface for the Office Integrations, the System Option has been removed in Content Manager 10.0.

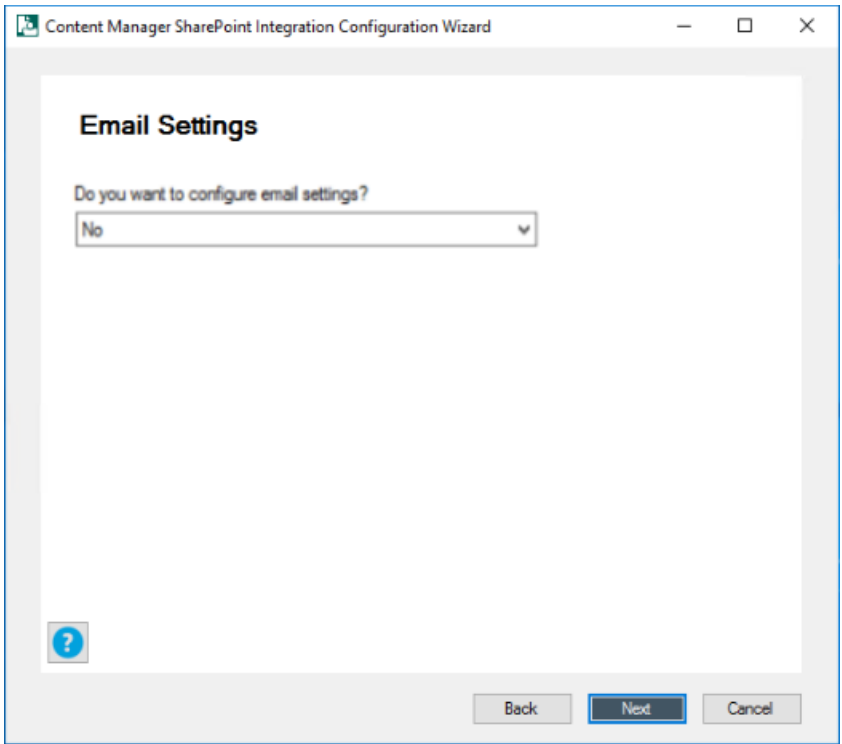
Content Manager SharePoint Governance and Compliance

Theme: User Experience

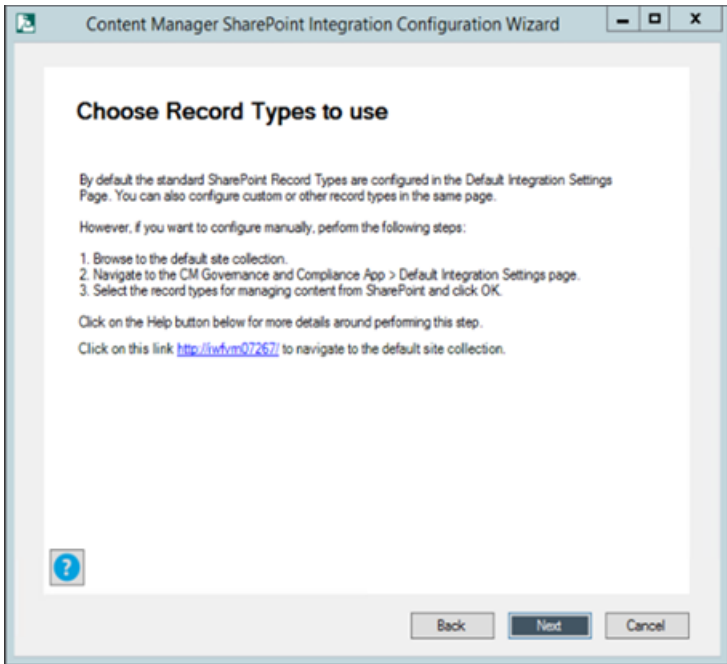
Improvements to the Installation and Configuration wizard for SP Online

Improved UI around email configuration and setting default record types in the **Configuration Wizard**.

In the **Configuration Wizard**, when you arrive at the email settings step, now you have the choice to configure the email at a later stage. You can choose **No** and continue with the next steps and configure the email later.



In the **Configuration Wizard**, the step to choose the record types to use is automated. By default, the standard SharePoint record type gets configured. You can choose **Next** and continue with the rest of the steps in the wizard. But, if you want to configure the record type manually, the **Configuration Wizard** provides steps by step instructions to manually configure the record types. Follow the steps given and then come back and continue with the next steps of **Configuration Wizard**.



For more details, see *4.1 Using Configuration Wizard* section in the *Content Manager Governance and Compliance SharePoint App: Installation Guide*.

Provide default for Site Records Management Option Settings

To reduce the effort taken to manually change the RMO settings of all the site collections, you can inherit the RMO settings to the site collections either during installation or during upgrading the app.

To access the **RMO settings** options, navigate to **Content Manager app** start page > **Content Manager default integration settings** page, check the **Push RMO Settings** checkbox to inherit the RMO settings to all your site collections.



For more details, see *5.1.5 Apply RMO Settings* section in the *Content Manager Governance and Compliance SharePoint App: User Guide*.

Support for Derived Content Types

In previous releases, the Management rules supported only document content type. In Content Manager 10.0, the Management rules support other content types, such as document set, business intelligent, digital asset, etc. and the content types derived from them.

Back to Site ▸ Management Rule

Management Rule

Identification

Specify a name and description for this management rule. These will be used when choosing a management rule so make them unique and include enough information for users to identify what the management rule is used for.

Indicating that this management rule is "Published" makes it available for selection and use.

Marking a rule as critical ensures that if this rule is applicable, the associated management instruction is always used regardless of whether there are other more applicable or higher priority rules.

Name:

Description:

Published
 Critical

Content Types

Use this section to specify the content type that this management rule is applicable to. The content type selected will determine which item properties are available for use in this rule.

If this rule should apply to all content types, then choose the "Item" content type.

Group:

Type:

Management Instructions

Choose the management instructions to use if this rule is applicable

Management Instructions:

Conditions

Use this section to define the conditions that describes the rule that must be satisfied.

If using the "AND" operator, the rule will only be applicable if all conditions are satisfied. If using the "OR" operator, the rule will be applicable if any of the conditions are satisfied.

Condition Grouping:
 AND
 OR

Conditions: [New condition](#)

Content Manager Infrastructure

Theme: Business Experience

Support for Content Manager Select Licensing

To support those organizations opting to move to the CM Select licensing option, the ability to apply a new license as well as the way the licenses are displayed have been enhanced.

Organizations will now be able to easily **Clear** their existing license details via **Content Manager Enterprise Studio - License** dialog before Importing a new license file.

Improvements have been made to the way the license details are displayed, including the explicit features that are defined as a part of the license. To view these explicit features, you will need to get a new .XML format license.

The file format of the Content Manager license key has been changed from a .DAT file to a .XML file. As a result, if at any time after upgrading to Content Manager 10.0+ and you need to import or change

your license, for example have a requirement to set up a new environment, or additional modules/seats/volume are purchased, a new XML license key for all previously keys that have been downloaded and imported into Content Manager will be required. For existing customers, you should contact your regional Sales and Support Renewal team to get access to the XML format license files.

The notification processes have been updated as a part of the requirements for Content Manager Select licenses. If the license has an expiry date:

- If the expiry date is due to expire, from within 10 days, users logging into Content Manager with the Windows client will get a warning that the license will expire in <number> of days.
- If the expiry date has expired, a 60 days grace period is allowed. After the grace period has expired the Workgroup Server will refuse any connections to the database, with the exception of connections impersonating TRIMServices, e.g. event processor connections. During this grace period Windows clients will get a warning message that the license has expired.

Obsoleted Platforms

Windows OS

- Windows 7.x
- Windows 8.x
- Windows Server 2012 & 2012 R2

Relational DB

- Oracle 11g R2
- Oracle 12c
- PostgreSQL 9.6.2
- SQL Server 2012
- SQL Server 2014

Browsers

- Microsoft Edge Legacy

Office versions

- Office 2010

Obsoleted Features

Support for HCL Lotus Notes

Support for Kofax 10.2x