🕭 miktysh

Content Manager 9.3

New Features

Rebranding

Content Manager has been rebranded with the removal of HPE and rebranding with Micro Focus. Brand new colour palette is aligned with the company's desire to build a consistent approach to the Micro Focus brand and continue the market leadership of Content Manager on a world-wide basis.

🔁 At	oout Content Manager [9.3.0.178]	×
+ + + + + + + + + + + + + + + + + + +	© Copyright 1994-2018 Micro Focus or one of its affiliates Portions Copyright © 1997-2018 Objective Corporation Limited. All rights reserved.	
	Contains Confidential Information. Except as specifically indicated otherwise, a valid license is required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.	
Close	Setup Info <u>T</u> ech Support	

New Tasks Added

A number of new tasks have been added to allow easier updating of record metadata.

Change Title

You can now select multiple records and update the title of all tagged records at once via the Right Click > Details > Title menu item.





	🚦 Tag All Ctrl+A			
Content Manager	Guntag all Ctri+U			= = ×
HOME SEARCH VIEW MANAGE ADMINIST Save CopyRecord W Mail Save Size Software San Save Save Save Wiew San Save Save Save Save Save Save Save Save	Cut Ctri+X Copy Ctri+C Ciesr Ctri+Delete New	port 🔡 Layouts - ort IIII Statistical - blish 🚢 Print Merge Reports		0-
Shortcuts Search for Search by	Search Navigation			
Recent Ittle Word Containers Ittle Ittle Containers Ittle Ittle Ittle Image: State St	Contained Records View Edit Ctel-O Check Dut Check Dut Check in Check	Notes Notes Classification Record Class Thesourus Terms Relationships Other Record Fields	Cords	Date Registered Date Created Date Registered Date Created 1364 11/07/2018 at 13:59 11/07/2018 at 13:59 1375 22/07/2018 at 14:24 16/07/2018 at 15:59 1376 22/07/2018 at 10:49 21/07/2018 at 10:47 1376 22/07/2018 at 10:49 17/04/2018 at 10:47 1376 22/07/2018 at 10:32 17/04/2018 at 06:17 1384 30/07/2018 at 10:32 21/07/2018 at 06:17 1381 25/07/2018 at 10:32 21/04/2018 at 16:41 1380 24/07/2018 at 11:43 14:451 1377 24/07/2018 at 10:52 24/07/2018 at 11:43 1377 24/07/2018 at 11:43 12/04/17:498 1377 24/07/2018 at 11:43 12/04/17:498 1377 24/07/2018 at 11:52 24/07/2018 at 11:52
Title Insurance - Aggregated Disposal Schedule Incentors Web URL Date Created 20 June 2013 at Date Registered 23 June 2013 at Container Enclosed? Y No Astignee Date of Disposal Match at Trays If any	Nay Remove From Perform Scheduled Task 8 af 👔 Properties All-Enter 15:47 ce 28 June 2016 at 15:47	Additional Fields		~
Change the title				Miktysh DemoDB MIKWIN8-2

Change Title - All tagged Records	×
Insurance and Records	
	1
n title	
	e I.
50 title	
OK Cancel Help	
	Insurance and Records





Change Record Number

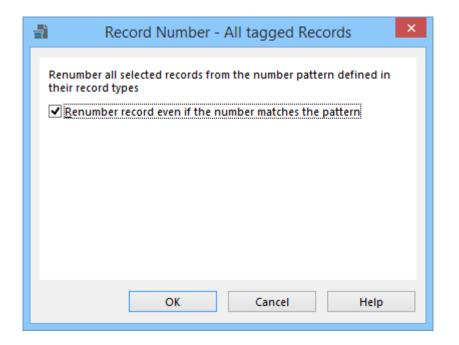
If you have made changes to the Record Type numbering patterns or if there has been a restructure which required records to be moved to different Record Types, you can update the record number of multiple records from the Right Click > Administrative Tools > Record Number menu item. This allows you to renumber the selected records to match the new numbering pattern, or to re-sequence them to match the numbering of their Record Type.

A new System Option 'Automatically renumbering a record when moved to a new container' has been added. When enabled, if a record has inherited its number from its container is moved to another container, then its number will be updated to reflect its new container number.

Content M HOME Save Sa	SEARCH VIEW MANAG Copy Record Mail d Clear X Delete Scan ies Ba Reference Read B		Invert all tags Cut Ctrl+X Copy Ctrl+C Clear Ctrl+Delete	ort 📄 Layouts マ rt 📶 Statistical マ ish 🚔 Print Merge				• ×
Shortcuts Recent		E sanch by Ritle Word	New Search Navigation	teports				
	Ta	r;	G Contained Records	- myDocuments - 24 Rec	rords			
Containers	↓ ■ Record Stumber ● ● ● ● ●		Edit Curri-O Check Out Check Out Supercopy Details Security and Audit Locations Requests Workflow Communications Electronic	Pearson m Record of Proceedings Mari for with Links t-Ski Challenge in Hinchenbro topification to Run Leg of Grea	Retention schedule XX-39,9,9 10-14,1,1	Unique identifier	Date Registered Date Created 1364 11/07/2018 at 15:59 11/07/2018 at 15:59 1375 23/07/2018 at 14:24 18/07/2018 at 15:59 1376 23/07/2018 at 14:24 18/07/2018 at 15:59 1376 23/07/2018 at 10:59 17/04/1998 1384 30/07/2018 at 10:59 17/07/2018 at 15:29 1384 25/07/2018 at 15:20 17/07/2018 at 15:39 1389 24/07/2018 at 15:59 24/07/2018 at 15:39 1397 24/07/2018 at 10:59 24/07/2018 at 15:39 1397 24/07/2018 at 10:59 24/07/2018 at 15:39 1397 24/07/2018 at 10:59 24/07/2018 at 15:39 1377 24/07/2018 at 10:59 24/07/2018 at 15:39 1377 24/07/2018 at 10:59 24/07/2018 at 15:39 1378 12/06/1998 12/06/1998	t 15:59 t 12:06 t 10:47 t 08:17 t 08:17 t 15:46 t 15:46 t 14:51 t 10:56
C. Favorites	Aggregated Disposal Schedule Schedule Click to a Web URL Date Created 28 June 2018	 Click to display 28 June 2018 at 15:46 26 June 2018 at 1 	Send To Remove From Remove From Remove From Rentorm Scheduled Task	Record Type Replace Phrase Record Number Synchronize Email Dates Update Parts				^
	Date Registered 28 June 2016 M 15/4 Edit Status 2 Checked in Revision Number 1 Container 1 Enclosed? X No Assignee Miktysh since 28 Author Lin Miktysh		ne 2018 at 15:47	Assign Part Rule Add To Hold Remove From Hold Add Jurisdiction Remove Jurisdiction Remove From Series				
📩 Trays	Date of Disposal	es A Preview A Previous	(Rendition/	Reindex X Delete				Ŷ







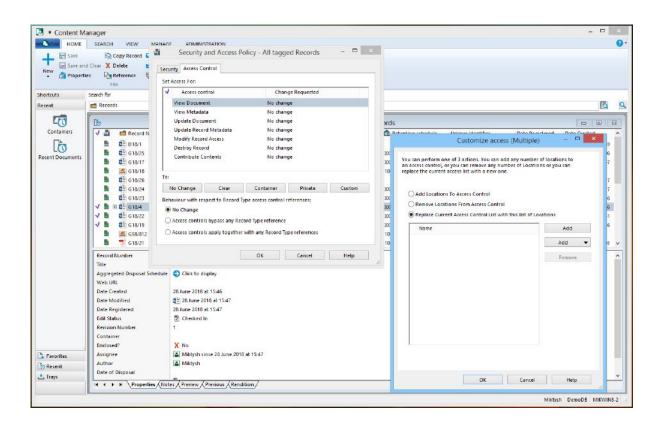
Updating Access Controls on Multiple Records

Three new options have been added relating to when multiple records require their Access Control settings to be customized. The options allow the user to:

- · 'Add Locations to Access Controls' add selected Locations to the existing Access Control List.
- · 'Remove Locations From Access Controls' remove the selected Locations from the existing Access Control list.
- · 'Replace Current Access Control List with this list of Locations' replace the existing Access Control list with the new Locations.





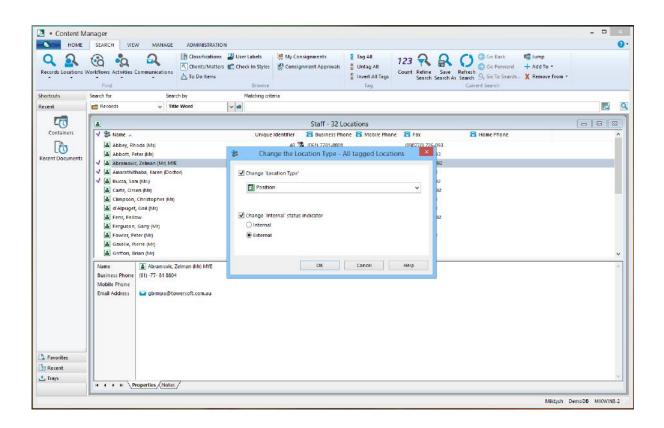


New Tasks to Update Locations

Change Location Type

The User can Right Click on a Location and select 'Change Location Type' to change the Location Type of a Location. It allows you to change a single Location or multiple Locations to a new Location Type. The internal status of the Location can also be updated using this option.





Change Profile Data

Items of Location Profile can also be updated from a single dialog for a single Location or multiple Locations at once. From the Location Right Click > Change Profile Data, the Profile data that can be updated from this dialog:

- · 'User Type' change the User Permissions for the selected Location(s);
- · 'Accept Logins' update the login permission for the selected Location(s);
- · 'Change Login Domain' update the login domain for the selected Location(s);
- · 'Change Login Expiry Date' set a Login Expiry date for the selected Location(s)
- · 'Change Use Profile Of' set a Location for the selected Location(s) to inherit their profile details from.





Content M HOME HOME Records Locations V Shortcuts	anager SEARCH VIEW MAN CO C C C C C C C C C C C C C C C C C C	Copy Ctrl+C New location	abels I fag All I 123 R R G G Go Back I tump In Styles Consignment Approvals I Invert All Tags Browse Tag count Petine Search As Search & G To Search X Remove From * Count Search Search As Search X Remove From *	×
Recent	Records V	Change Location Type		
		Change Profile Data		E
Containers Containers Recert Documents		Mail To View Maintain User Labels Maintain Check In Styles Security and Audit Delete Send To Remove From Show	Staff - 32 Locations Unique Identifier © Business Phone © Mobile Phone © Fax © Home Phone 45 © 061 17731-8801 (990770) 726.093 (9611 77712.693 17 © 061 17731-8802 (9611 7772.693 6 © 061 17731-8802 (9611 7772.693 16 © 061 17731-8802 9917072 2603 1164 © 061 17731-8811 (9011 7772.692 5 © 051 17731-8811 9071072 6093 1164 © 051 17731-8812 9977072 26093 29 © (51) (77) 81 612 9977072 26093 58 © (51) (77) 81 612 9977072 26093 58 © (51) (77) 81 612 9977072 26093 58 © (51) (77) 81 614 (51) (77) 72 6092 7 © (51) (77) 81 618 9977072 26093 28 © (51) (77) 81 618 9977072 26093 28 © (51) (77) 81 618 9977072 6093 28 © (51) (77) 81 618 99770726093 29 © (51) (73) 81 618 99770726093 29 © (51) (73) 81 618 997707	
C Favorites D Recent ▲ Trays Change the profile d	Name Abram Business Phone (61) - 77. 51 Mobile Phone Email Address group gbrmp	n <mark>∰ Properties Ait+Enter</mark>	Miktysn i D	emoDB MIKWINS-2

•	Contributions Activities C Find	•	[] Classifications 《 Clients/Matters 쇼. To Do Items	C Check In Styles Browse	🐖 My Consignments 🐙 Consignment Approvals	Tag All Untag All Invert All Tags Tag	123 R Count Refine Search	Save Refresh Q Go To Search As Search Q Go To Search	ward + Add To -	
	earch for earch secords	Seari V Titl		Matching oit	aria					
ites	Abbott, Pe Abramovic Amarathilt Am	Abbey, Rhoda (Ms) Act, Orone (Ms)		Chang Chang All Chang Chang Chang						
	H 4 P H \P		,							

🕭 miktysh

Change the profile data - All tagged Locations ×
Change 'User Type'
✓
Change ' <u>A</u> ccept Logins'
Allow logins Disallow logins
Change 'Login Do <u>m</u> ain'
Change 'Login E <u>x</u> piry Date'
Change 'Use Pro <u>f</u> ile Of'
OK Cancel Help

Modify Email Address

When selecting a Location, the user can Right Click > Modify Email - allows organisations to change the domain component of the email address of a single or multiple Locations.

Updating the Default Jurisdiction on Locations

The 'Other Location Fields' dialog has a new option added, 'Change default

Jurisdiction'. This option allows organisations to apply a new default Jurisdiction to Location(s).





Content Manager HOME SEARCH VIEW MANAGE MANAGE Records Lacations Workflows Attivities Communications Find	Tag All Curl-A Untag all Ctrl-U Invert all Tags Copy Ctrl-C New location Copy toration Consignment Approvals Tag All Untag All Consignment Approvals Tag Constrained Cons	
Shortruts Seerch for Seerch for Recent ■ Records ■ Containers ■ ■ ■ Recent Documents ■ Absort, Peter (Mr) ■ Recent Documents ■ ■ ■ Recent Documents ■ ■ ■ Image: Second S	Change Location Type Change Profile Data Staff - 32 Locations Image Profile Data Staff - 32 Locations Image Profile Data Image Profile Data Image Profile Data Staff - 32 Locations Image Profile Data Image Profile Data Image Profile Data Staff - 32 Locations Image Profile Data Image Profile Data	
Nome ▲ Abramone, ZE Buaness Phone (B), 77. 81.8924 Mobile Enole Email Address Email Address ■ gbrmpa@tow Trays It 4 > H Modify email address	Properties Alt-Enter	Miklysh DemoDB MikWilk3-2

• •	SEARCH VIEW MANAGE	ADMINISTRATION	In Styles Consignment Approvals	E Tag All Untag All Invert All Tags Tag	123 💦 🔐 Count Refine Save Search Search	Refresh	₩ Jump + Add To + X Remove From +	0
Shortcuts		rch by M Be Word 🗸 💼	atching criteria					
5			Staff - 32 L	ocations				
Containers E	Business Phone (61) -77- 81 880 Mobile Phone	z Jorj Zólman (Ak) MYE	45 🍖 (061) 7781-8801	ancel Heli	(090770) 726.093 72.6003 72.6002 72.6002 72.6002 72.6002 72.6093 72.6093 72.6093 72.6093 72.6093 72.6093 72.6093	Home Phone		< ×
C Favorites C Recent ▲ Trays	H + + H Properties/Notes	5/					Mikyob (ZemoDB Miktwinks-2

🕭 miktysh

-	Modify Email - All tagged Locations	×
<u>S</u> earch) for	
mikty		- 1
	ce with ompany	
		_
	OK Cancel Help	

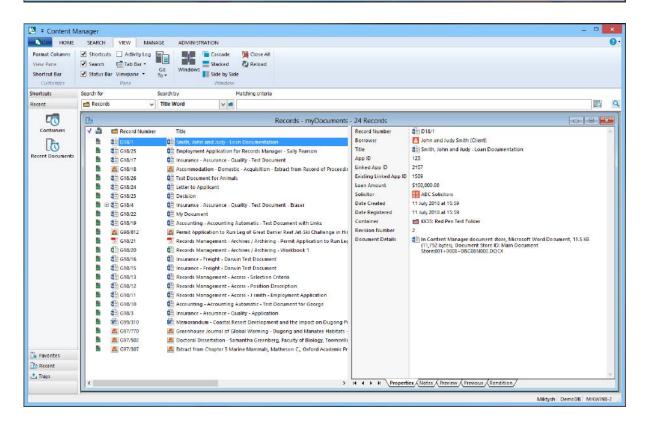
View Pane Panel

You can now move the View Pane from the bottom of the screen to the side of the screen. This is done via the View ribbon from a drop-down menu for the View Pane Option.

HOME	SEARCH VIEW	MANAGE ADMINISTRATION		
ords Locations Wi	oristTows Activities Commu	Im Classifications Im Cla	rward + Add To • Search X Remove From	
cuts S	Search for	Search by Matching criteria		
nt	💼 Records	V Title Word V 📾		To.
1	180	Records - myDocuments - 24 Records		
Containers	Record Nu		Date Registered	Date Created
	E 5-018/1	🚰 Smith, John and Judy - Loan Documentation	1364 11/07/2018 at 15:59	11/07/2018 at 15:59
0	G18/25	Employment Application for Records Manager - Sally Pearson XX-99.9.9	1383 25/07/2018 at 14:24	
nt Documents	🖺 🚰 G18/17	G hourance - Assurance - Quality - Test Document XX-99.9.9	1375 23/07/2018 at 10:49	23/07/2018 at 10:47
	🖹 🧾 G18/18	Accommodation - Domestic - Acquisition - Extract from Record of Proceedings Man 10-14.1.1	1376 24/07/2018 at 10:50	17/04/1998
	🖺 🔮 G18/26	🗱 Test Document for Animals	1384 30/07/2018 at 08:46	17/07/2018 at 08:17
	🖺 🖉 G18/24	Letter to Applicant XX-99.9.9	1382 25/07/2018 at 13:02	17/07/2018 at 08:17
	🔓 🐔 G18/23	C Decision XX-99.9.9	1381 25/07/2018 at 13:02	28/06/2018 at 15:46
	🖺 🗄 🌠 G18/4	insurance - Assurance - Quality - Test Document - Eraser XX-99.9.9	1359 28/06/2018 at 15:47	28/06/2018 at 15:46
	618/22	My Document XX-99.9.9	1380 24/07/2018 at 14:51	
	🖆 🔮 G18/19	Accounting - Accounting Automatic - Test Document with Links XX-99.9.9	1377 24/07/2018 at 10:59	
	G98/812	E Permit Application to Run Leg of Great Barrier Reef Jet-Ski Challenge in Hindhenbro 10-14.1.1	313 12/06/1998	12/06/1998
	📑 📆 G18/21	📜 Records Management - Archives / Archiving - Permit Application to Run Leg of Grea 10-14.1.1	1379 24/07/2018 at 11:03	24/07/2018 at 11:03
	Record Number	D18/1		
	Borrower	Solution and Judy Smith (Client)		
	A Statistics	🚰 Smith, John and Judy - Loan Documentation		
	App ID	123		
	Linked App ID	2157		
	Existing Linked App ID	1589		
	Loan Amount Solicitor	S100,000.00		
	Date Created	11 July 2018 at 15:59		
	Date Registered	1 July 2018 at 15:59		
	Container	m KK35: Red Pen Test Folder		
avorites	Revision Number	2		
	Document Details	- 🚰 In Content Manager document store, Microsoft Word Document, 11.5 KB (11,752 bytes), Document Store ID: Main Document Store:001+000X+0(5C)	0851002.DOCX	
ecent				
rays		s / Notes / Preview / Previous / Rendition /		
	Property	Violes Vienen Vi		



Content Ma	ADD TO A						
HOME	SEARCH VIEW	MANAGE ADMINISTRATION					(
ormat Columns	Shortcuts 🗌 Activity						
/leve Pane	🗹 Search 🛛 📑 Tab Bar						
hortcut Bar	Status Bar Viewpane	Go Windows Side by Side					
Customize	▼ Botto	Window					
ortcuts	Search for Right	Search by Matching criteria					_
ecent	Records	Title Word				15	
1	[to	Records - myDocuments - 24 Rec	ords				×
Containers	Record Ne	A CONTRACTOR OF	ft Retention schedule	Unique Identifier	Date Registered	Date Created	~
		Smith: John and Judy - Loan Documentation			1364 11/07/2018 at 15:59	Electron States	
lo	G18/25	Employment Application for Records Manager - Sally Pearson	XX.99.9.9		1383 25/07/2018 at 14:24	a a la check de la checker de la checker	
ecent Documents	G18/17	Insurance - Assurance - Quality - Test Document	XX.99.9.9		1375 23/07/2018 at 10:49		
	G18/18	Accommodation - Domestic - Acquisition - Extract from Record of Proceedings Mari	10-14.1.1		1376 24/07/2018 at 10:50		
	G18/26	Test Document for Animals			1384 30/07/2018 at 08:46		÷
	G18/24	Letter to Applicant	XX-99.9.9		1382 25/07/2018 at 13:02		
	G18/23	Decision	XX.99.9.9		1381 25/07/2018 at 13:02		
	E G18/4	Insurance - Assurance - Quality - Test Document - Eraser	XX.99.9.9		1359 28/06/2018 at 15:47		
	G18/22	My Document	XX-99.9.9		1380 24/07/2018 at 14:51	24/07/2018 at 14:51	È.
	G18/19	Accounting - Accounting Automatic - Test Document with Links	XX-99.9.9		1377 24/07/2018 at 10:59		
	G98/812	🧱 Permit Application to Run Leg of Great Barrier Reef Jet-Ski Challenge in Hinchenbro	10-14.1.1		313 12/08/1998	12/08/1998	
	📕 🛃 G18/21	🗾 Records Management - Archives / Archiving - Permit Application to Run Leg of Grea	10-14.1.1		1379 24/07/2018 at 11:03	24/07/2018 at 11:03	
	Record Number	₫ <u></u>] D18/1					1
	Borrower	John and Judy Smith (Client)					
	Title	🚰 Smith, John and Judy - Loan Documentation					
	App ID	123					
	Linked App ID	2157					
	Existing Linked App ID	1589					
	Loan Amount	\$100,000.00					
	Solicitor	R ABC Solicitors					
	Date Created	11 July 2018 at 15:59					
	Date Registered	11 July 2018 at 15:59					
	Container	📹 KK35: Red Pen Test Folder					
Favorites	Revision Number	2					
Recent	Document Details	In Content Manager document store, Microsoft Word Document, 11.5 KB (11,752 bytes), Docum	ent Store ID: Main Documen	t Store: 001+000X+0(5)	C0851002.DOCX		
Trays							
		is (Notes / Preview / Previous / Rendition /					-





Office Integration

In previous releases there was a disconnect between Office and Content Manager when a user Edited a document from the Content Manager client. In Content Manager 9.3, when the user uses the Edit option, the Content Manager Office Integration options such as 'Check In', 'Make Final', Check In on Close' and 'Records Properties', will have the same behaviour as they do when you open a record from within the Content Manager integration Office application.

This is for when the user uses the Office Integration with the Content Manager client.

An option to display the Content Manager Properties dialog box has been moved to the Content Manager Options in the Office application, that than having to update an installed Preferences file. If this option is enabled, the record Properties dialog will be displayed rather than opening a record window in the Content Manager client or Web Client.

