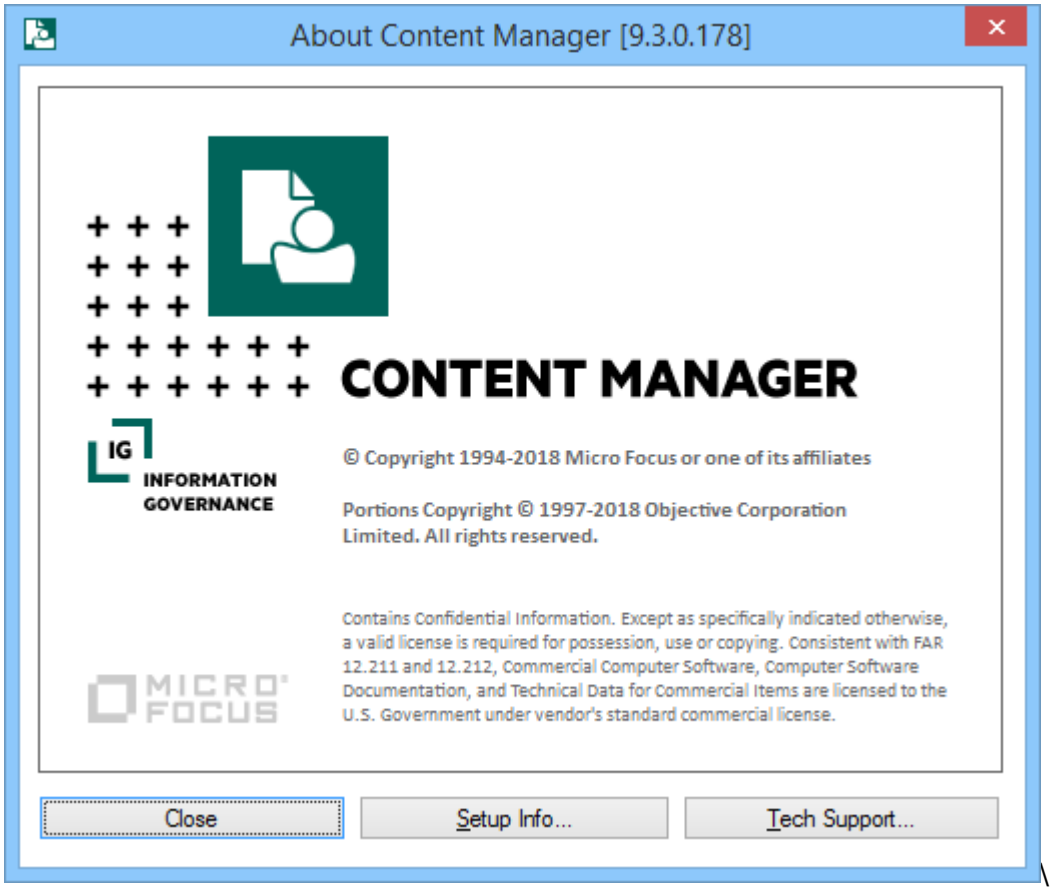
Content Manager 9.3

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.

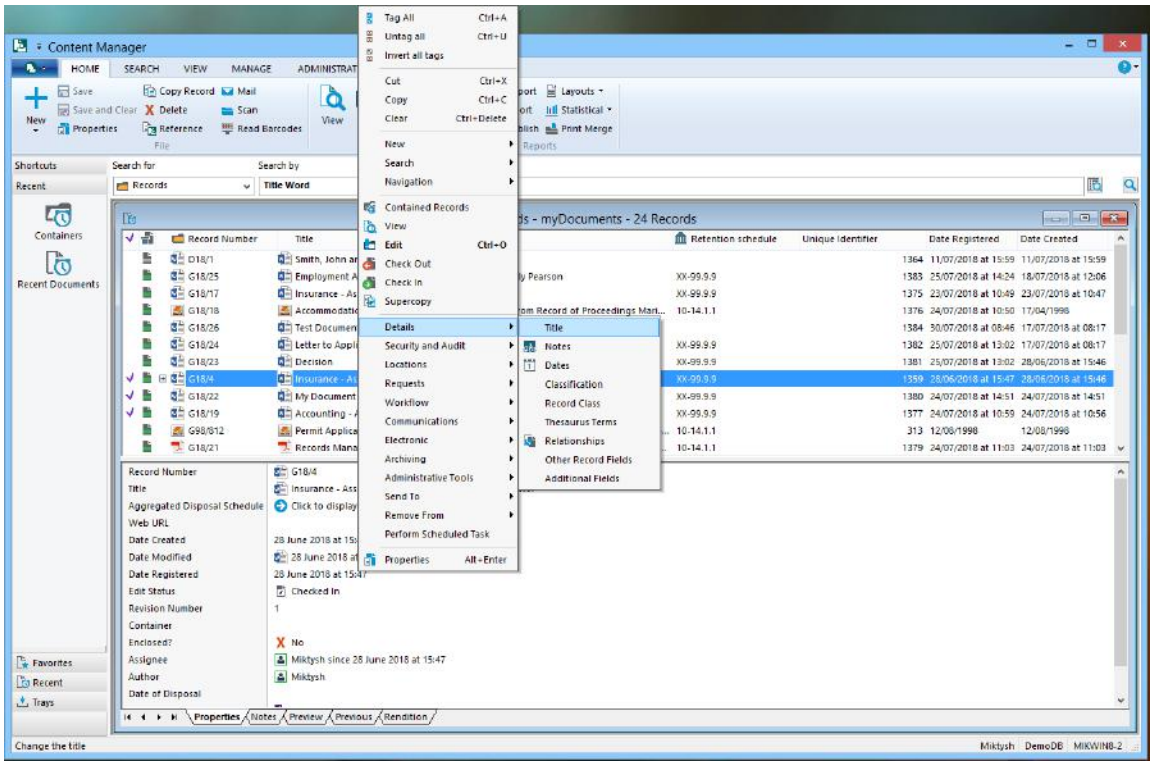


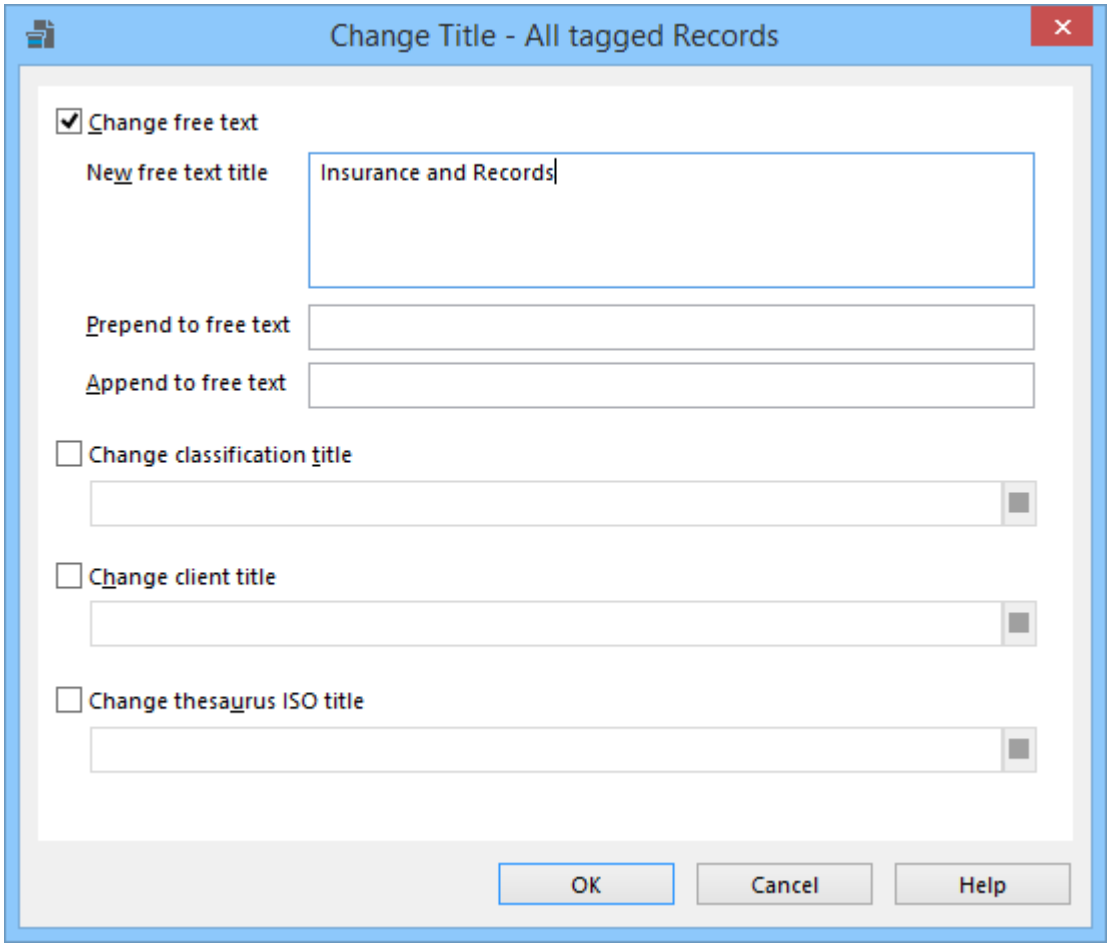
New Tasks Added

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.

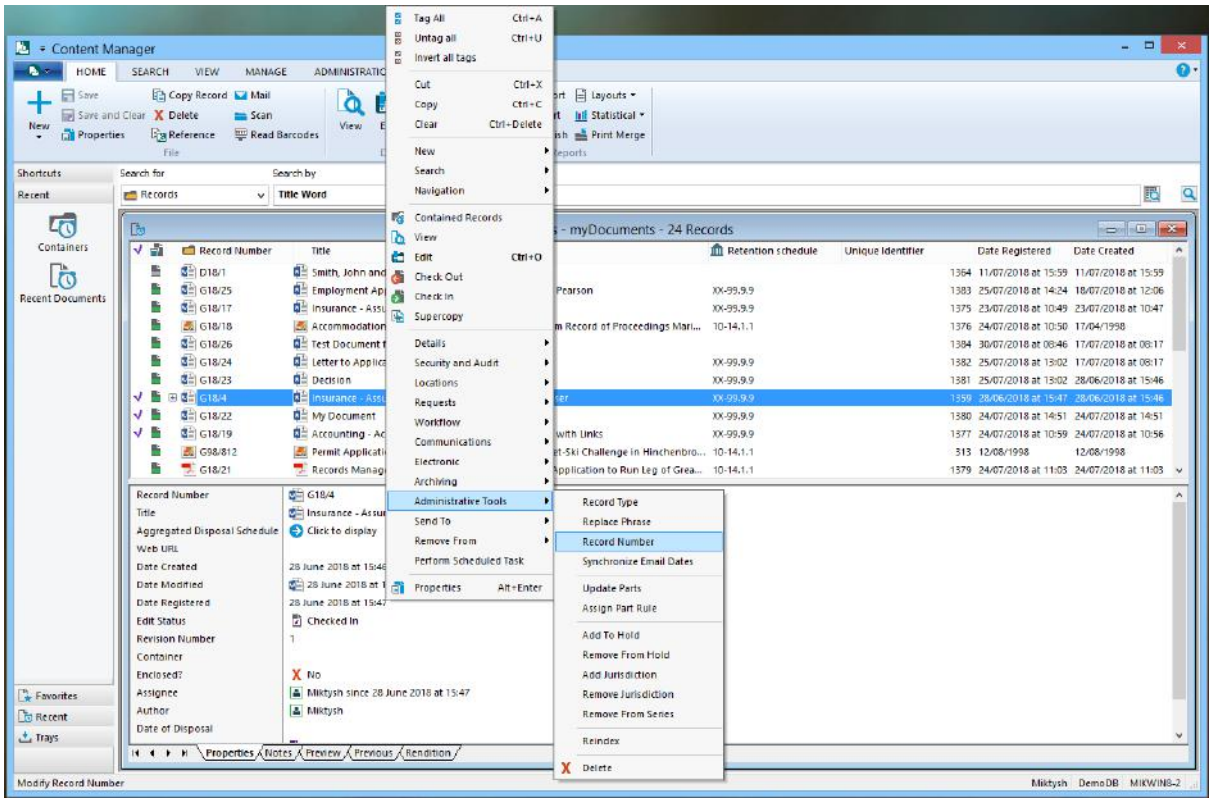

Content Manager
HOME
SEARCH
VIEW
MANAGE
ADMINISTRAT
Tag All Ctrl+A
Untag all Ctrl+U
Invert all tags
Cut Ctrl+X
Copy Ctrl+C
Clear Ctrl+Delete
New
Search
Navigation
Contained Records
View
Edit Ctrl+O
Check Out
Check In
Supercopy
Details
Security and Audit
Locations
Requests
Workflow
Communications
Electronic
Archiving
Administrative Tools
Send To
Remove From
Perform Scheduled Task
Properties Alt+Enter
Title
Notes
Dates
Classification
Record Class
Thesaurus Terms
Relationships
Other Record Fields
Additional Fields
myDocuments - 24 Records
Record Number
Title
Retention schedule
Unique Identifier
Date Registered
Date Created
Containers
Recent Documents
Favorites
Recent
Trays
Properties
Notes
Preview
Previous
Rendition
Change the title
Miktysh
DemoDB
MIKWIN8-2

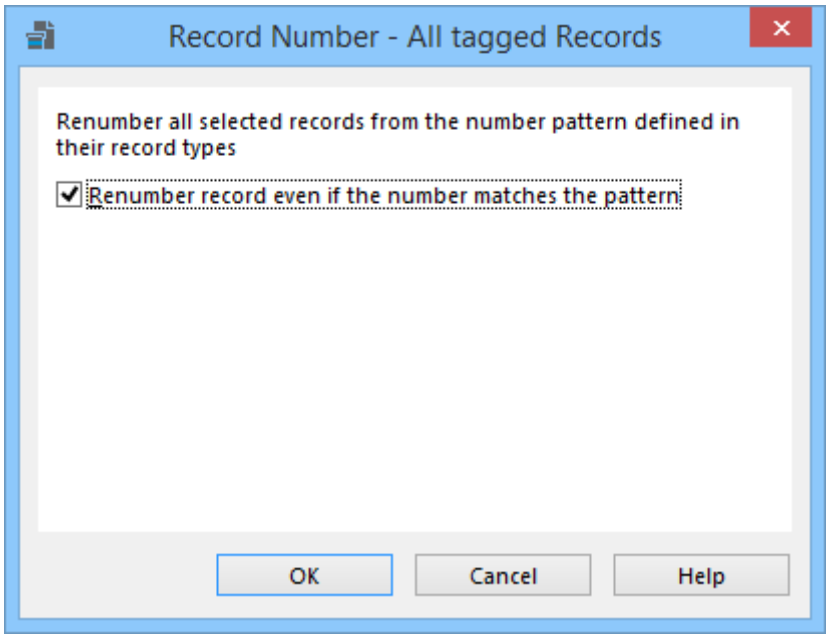

Change Title - All tagged Records
Change free text
New free text title
Insurance and Records
Prepend to free text
Append to free text
Change classification title
Change client title
Change thesaurus ISO title
OK
Cancel
Help

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.

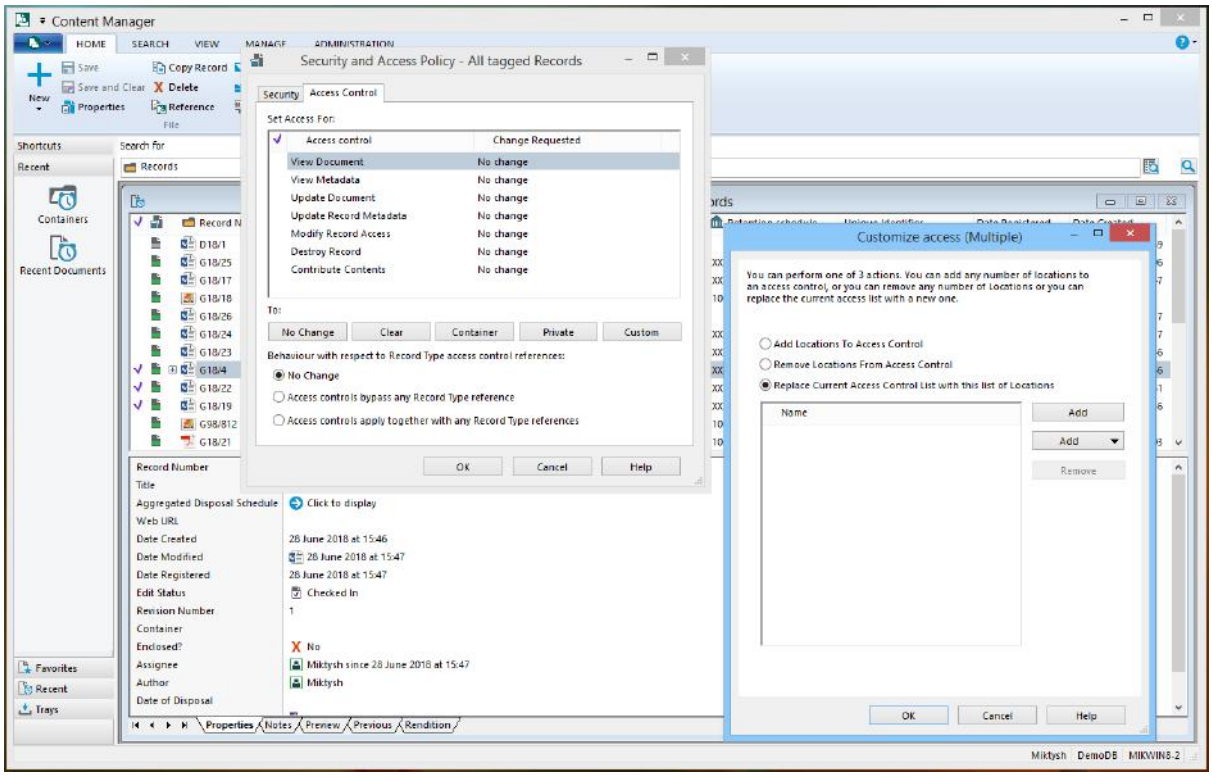




Updating Access Controls on Multiple Records

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:

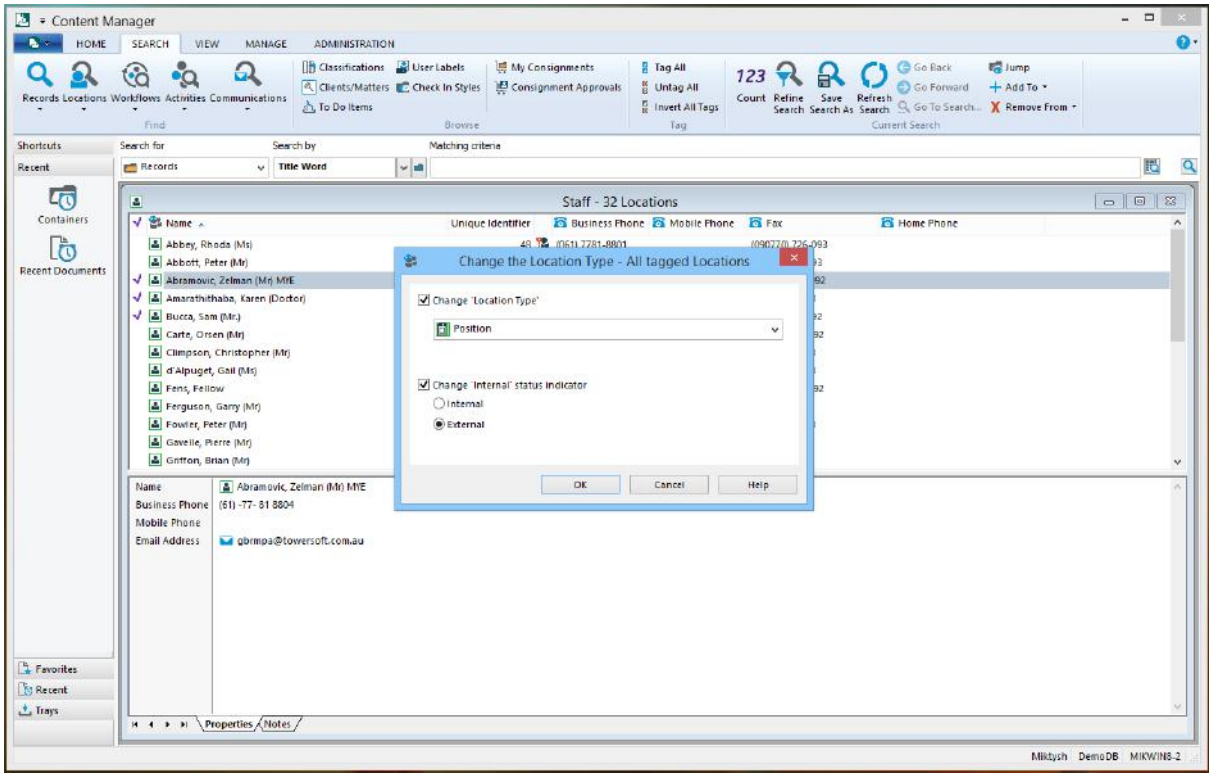
- 'Add Locations to Access Controls' - add selected Locations to the existing Access Control List.
- 'Remove Locations From Access Controls' - remove the selected Locations from the existing Access Control list.
- 'Replace Current Access Control List with this list of Locations' - replace the existing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



New Tasks to Update Locations

Change Location Type

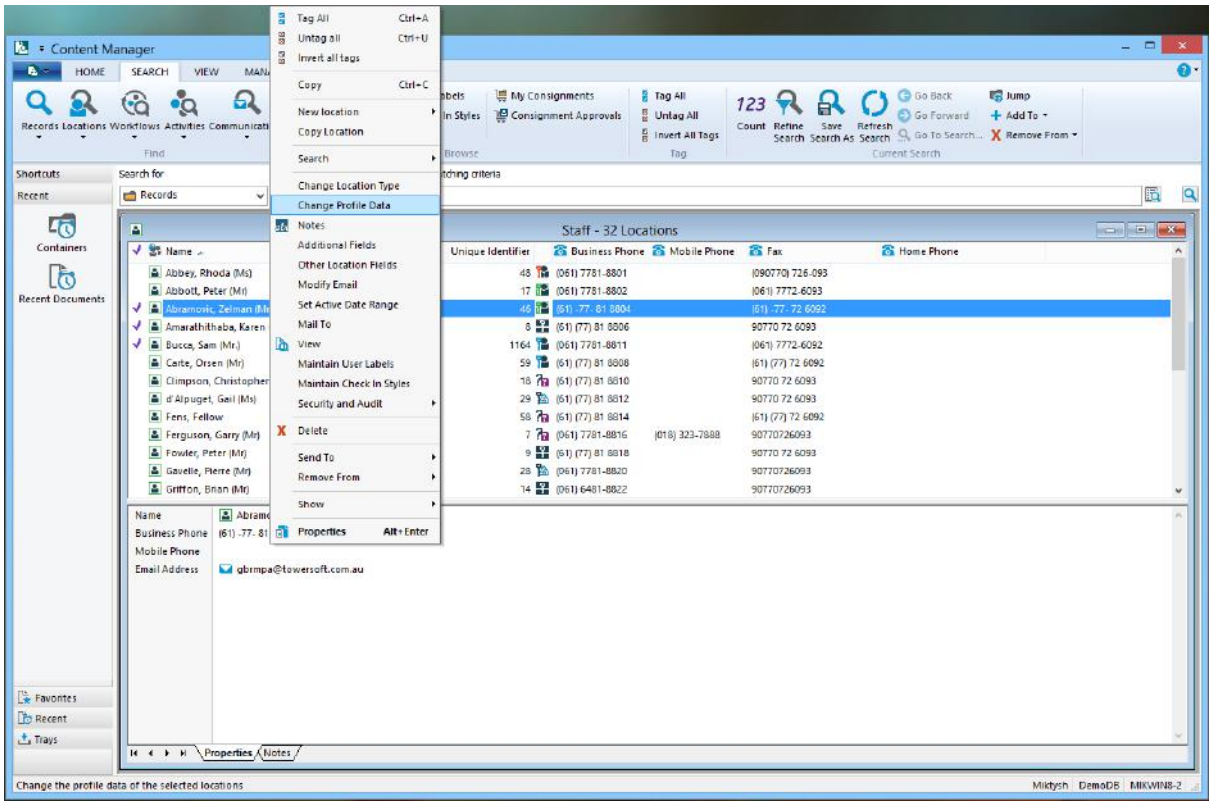
The User can Right Click on a Location and select 'Change Location Type' to change the Location Type of a Location. It allows you to change a single Location or multiple Locations to a new Location Type. The internal status of the Location can also be updated using this option.

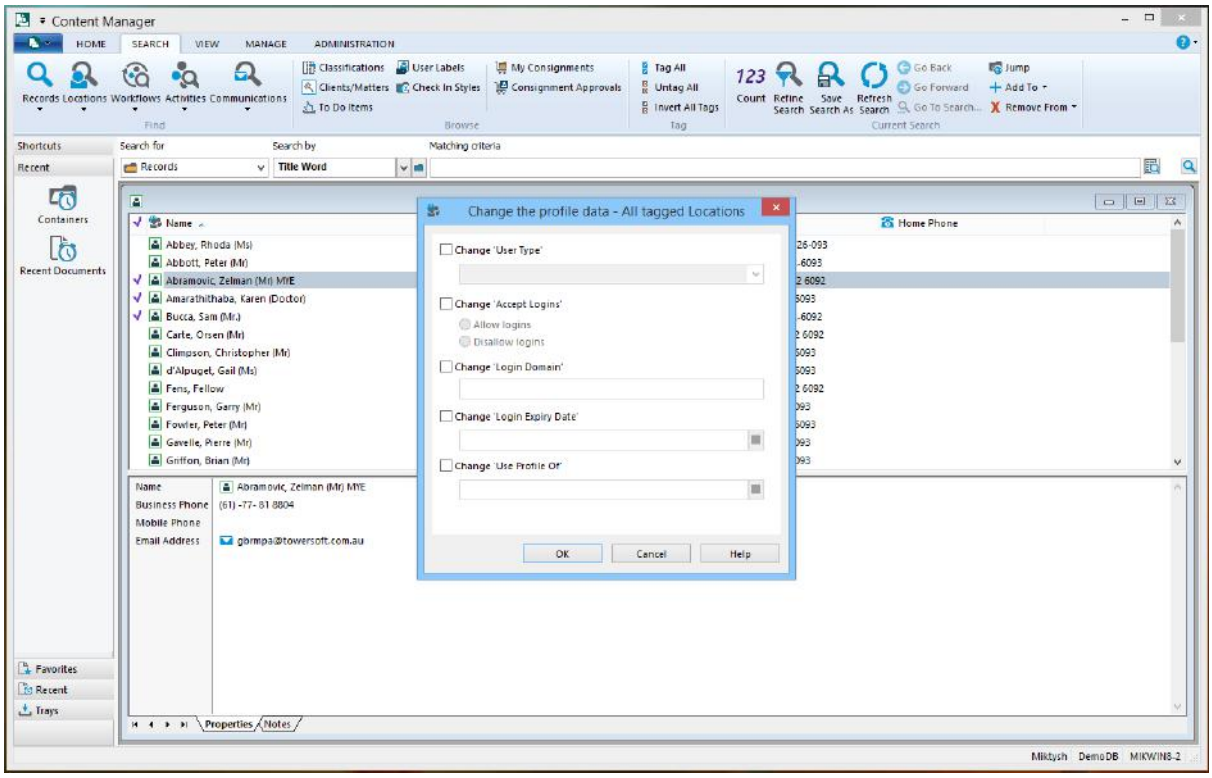


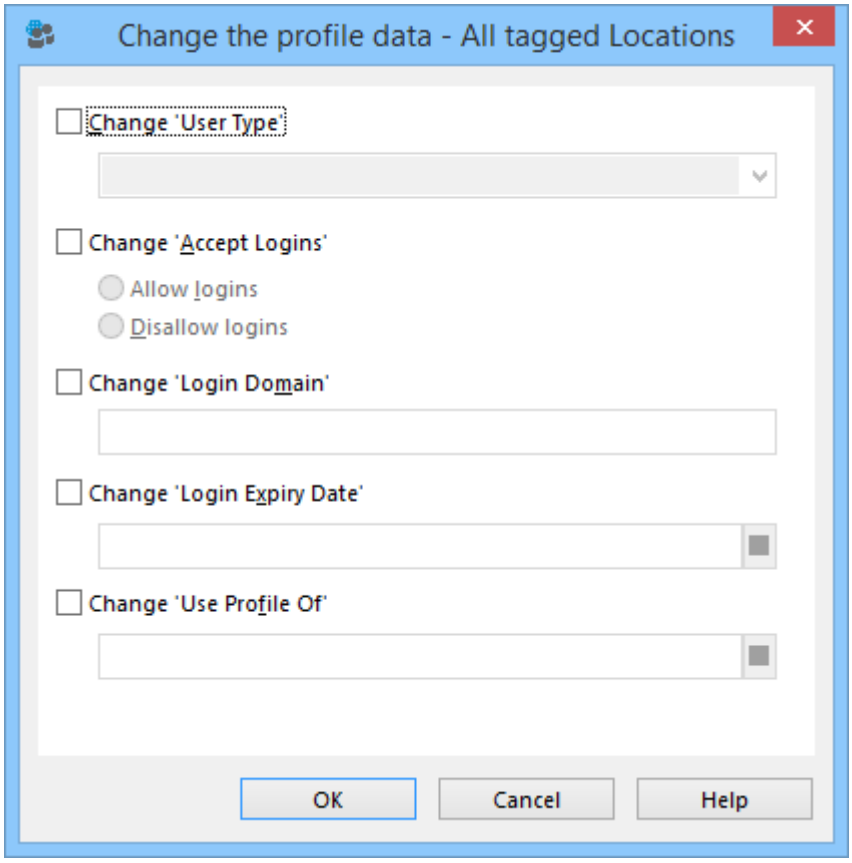
Change Profile Data

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 Manager
HOME
SEARCH
VIEW
Tag All Ctrl+A
Untag all Ctrl+U
Invert all tags
Copy Ctrl+C
New location
Copy Location
Search
Change Location Type
Change Profile Data
Notes
Additional Fields
Other Location Fields
Modify Email
Set Active Date Range
Mail To
View
Maintain User Labels
Maintain Check In Styles
Security and Audit
Delete
Send To
Remove From
Show
Properties Alt+Enter
Staff - 32 Locations
Change the profile data of the selected locations


Content Manager
HOME
SEARCH
VIEW
MANAGE
ADMINISTRATION
Change the profile data - All tagged Locations
Change 'User Type'
Change 'Accept Logins'
Allow logins
Disallow logins
Change 'Login Domain'
Change 'Login Expiry Date'
Change 'Use Profile Of'
OK
Cancel
Help



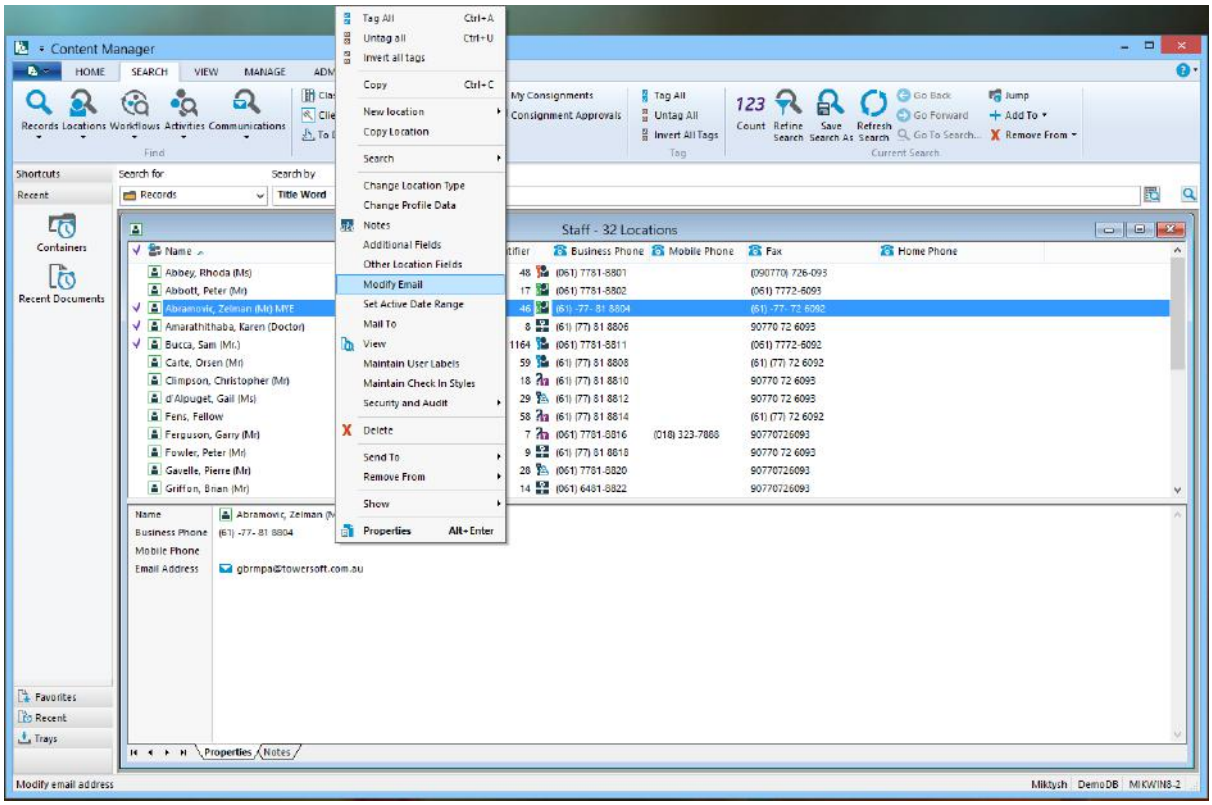
Modify Email Address

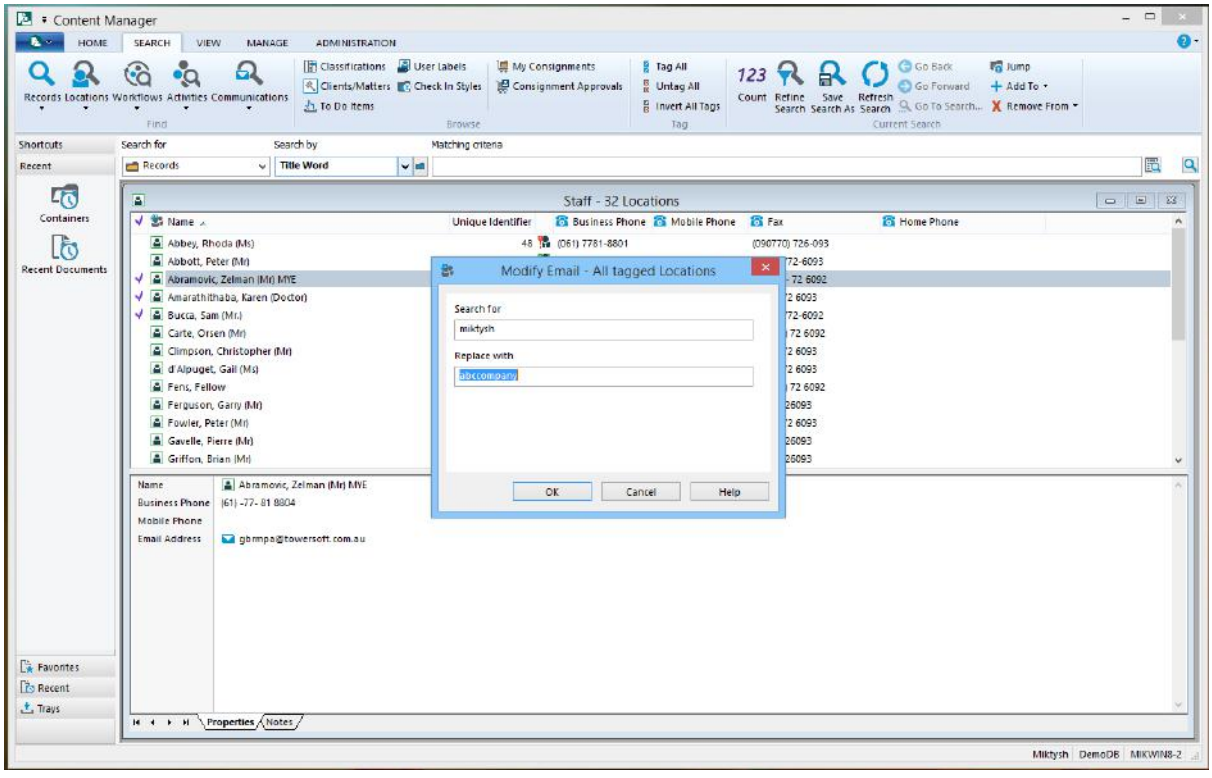
When selecting a Location, the user can Right Click > Modify Email - allows organisations to change the domain component of the email address of a single or multiple Locations.

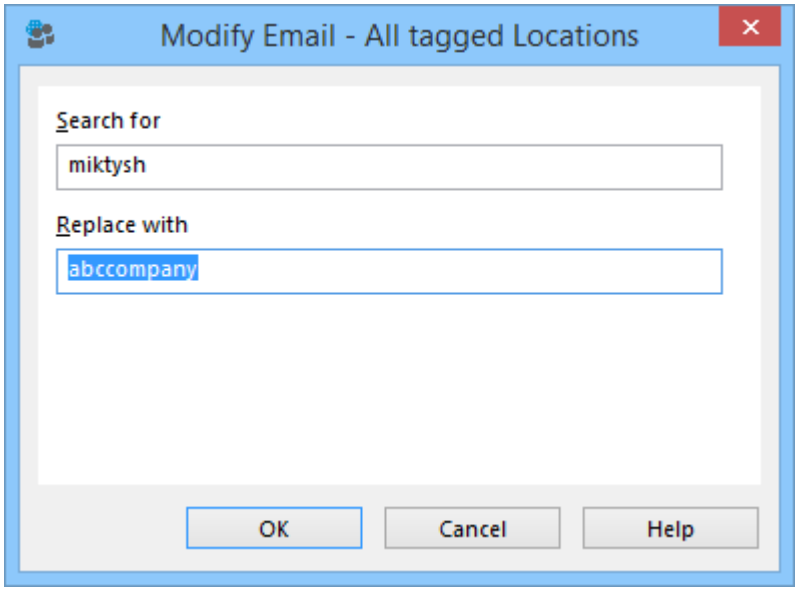
Updating the Default Jurisdiction on Locations

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).

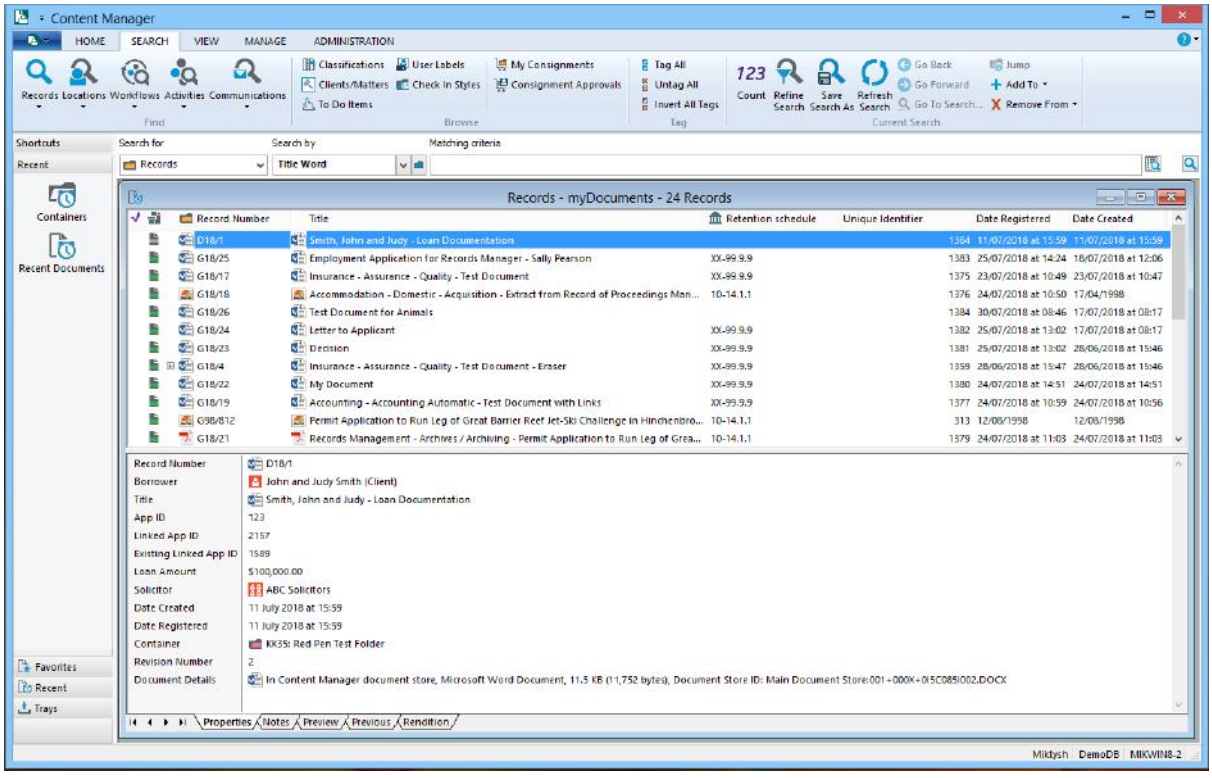

Content Manager
HOME
SEARCH
VIEW
MANAGE
Tag All
Untag all
Invert all tags
Copy
New location
Copy Location
Search
Change Location Type
Change Profile Data
Notes
Additional Fields
Other Location Fields
Modify Email
Set Active Date Range
Mail To
View
Maintain User Labels
Maintain Check In Styles
Security and Audit
Delete
Send To
Remove From
Show
Properties
Staff - 32 Locations
Name
Business Phone
Mobile Phone
Fax
Home Phone
Abbey, Rhoda (Ms)
Abbott, Peter (Mr)
Abramovic, Zelman (Mr) MYE
Amarathithaba, Karen (Doctor)
Bucca, Sam (Mr.)
Carte, Orsen (Mr)
Climpson, Christopher (Mr)
d'Alpuget, Gail (Ms)
Fens, Fellow
Ferguson, Garry (Mr)
Fowler, Peter (Mr)
Gavelle, Pierre (Mr)
Griffon, Brian (Mr)
Email Address
gbrmpa@towersoft.com.au
Modify email address

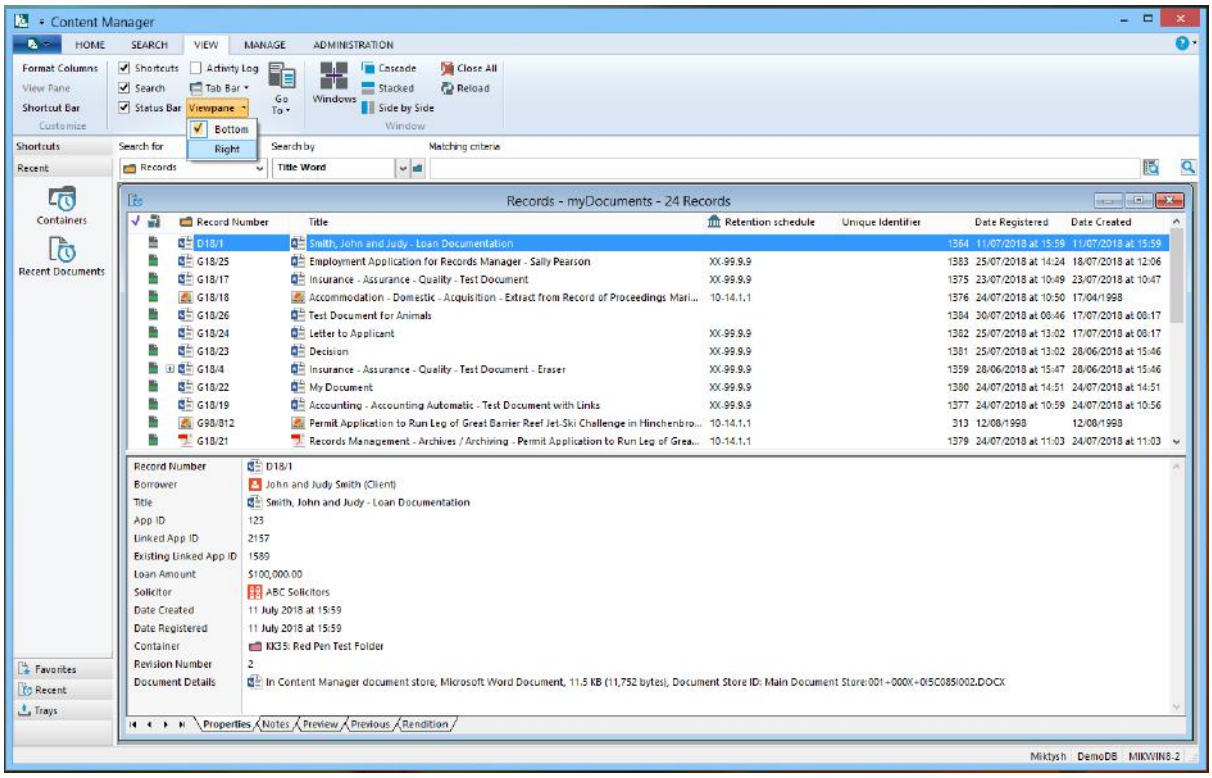

Content Manager
HOME
SEARCH
VIEW
MANAGE
ADMINISTRATION
Staff - 32 Locations
Modify Email - All tagged Locations
Search for
miktysh
Replace with
abccompany
OK
Cancel
Help
Abramovic, Zelman (Mr) MYE
gbrmpa@towersoft.com.au

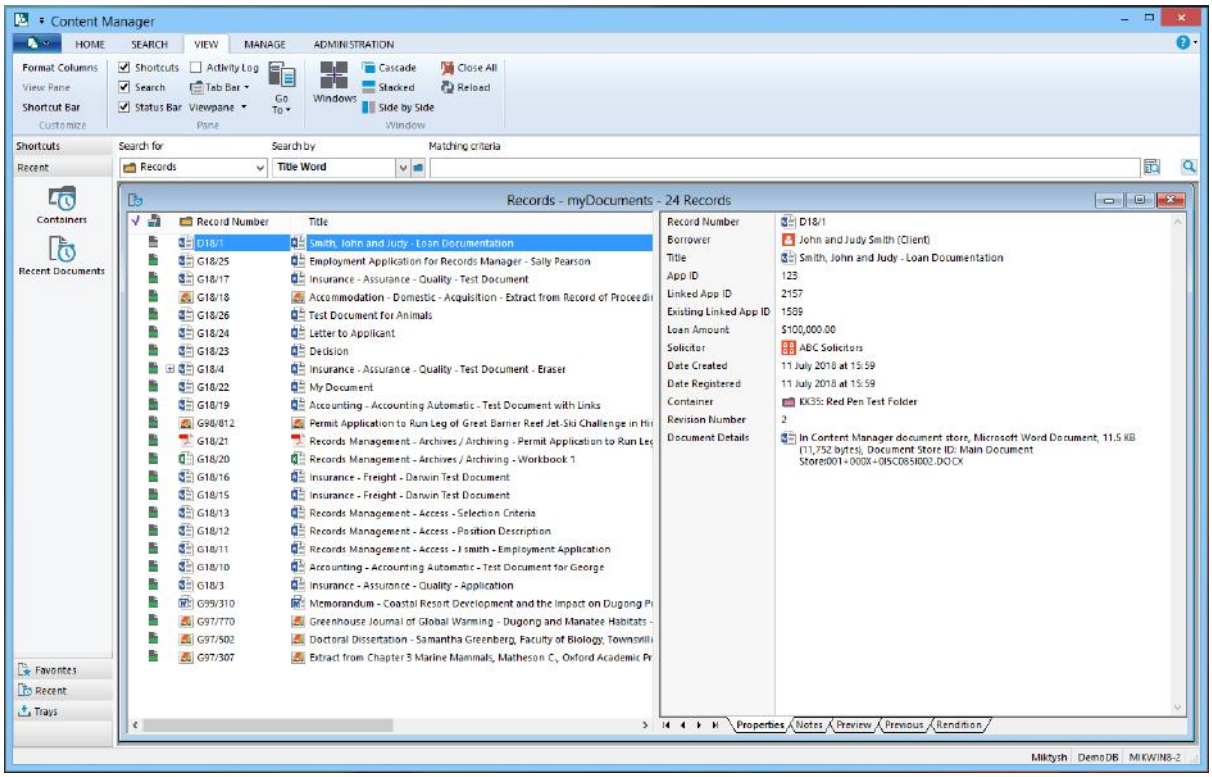


View Pane Panel

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.

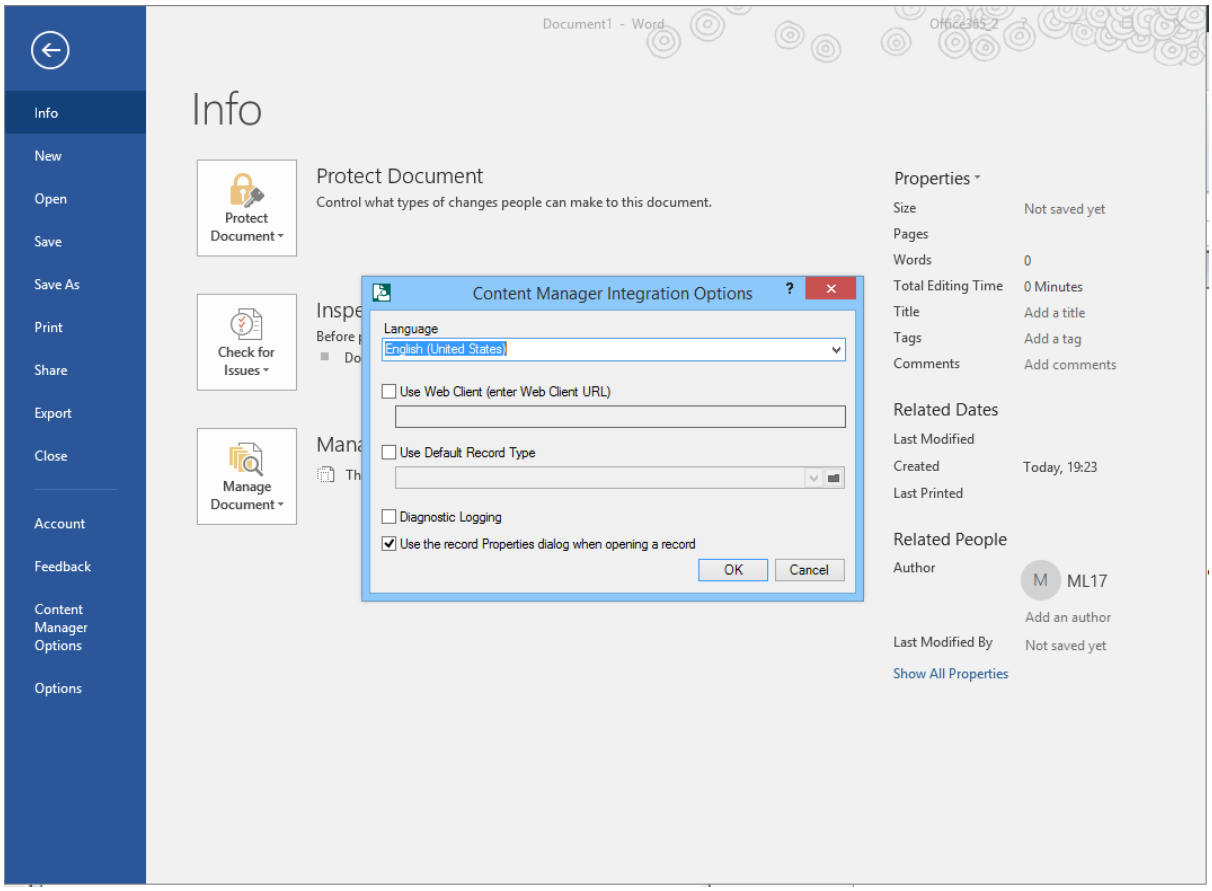



Content Manager
HOME
SEARCH
VIEW
MANAGE
ADMINISTRATION
Format Columns
View Pane
Shortcut Bar
Customize
Shortcuts
Search
Status Bar
Activity Log
Tab Bar
Viewpane
Bottom
Right
Go To
Windows
Cascade
Stacked
Side by Side
Close All
Reload
Window
Search for
Search by
Matching criteria
Records
Title Word
Containers
Recent Documents
Records - myDocuments - 24 Records
Record Number
Title
Retention schedule
Unique Identifier
Date Registered
Date Created
D18/1
Smith, John and Judy - Loan Documentation
G18/25
Employment Application for Records Manager - Sally Pearson
G18/17
Insurance - Assurance - Quality - Test Document
G18/18
Accommodation - Domestic - Acquisition - Extract from Record of Proceedings Mari...
G18/26
Test Document for Animals
G18/24
Letter to Applicant
G18/23
Decision
G18/4
Insurance - Assurance - Quality - Test Document - Eraser
G18/22
My Document
G18/19
Accounting - Accounting Automatic - Test Document with Links
G98/812
Permit Application to Run Leg of Great Barrier Reef Jet-Ski Challenge in Hinchenbro...
G18/21
Records Management - Archives / Archiving - Permit Application to Run Leg of Grea...
Record Number
Borrower
John and Judy Smith (Client)
Title
App ID
123
Linked App ID
2157
Existing Linked App ID
1589
Loan Amount
$100,000.00
Solicitor
ABC Solicitors
Date Created
11 July 2018 at 15:59
Date Registered
11 July 2018 at 15:59
Container
KK35: Red Pen Test Folder
Revision Number
2
Document Details
Properties
Notes
Preview
Previous
Rendition
Favorites
Recent
Trays
Miktysh
DemoDB
MIKWIN8-2


Content Manager
HOME
SEARCH
VIEW
MANAGE
ADMINISTRATION
Format Columns
View Pane
Shortcut Bar
Customize
Shortcuts
Search
Status Bar
Activity Log
Tab Bar
Viewpane
Pane
Go To
Windows
Cascade
Stacked
Side by Side
Close All
Reload
Window
Search for
Search by
Matching criteria
Records
Title Word
Containers
Recent Documents
Records - myDocuments - 24 Records
Record Number
Title
D18/1
Smith, John and Judy - Loan Documentation
G18/25
Employment Application for Records Manager - Sally Pearson
G18/17
Insurance - Assurance - Quality - Test Document
G18/18
Accommodation - Domestic - Acquisition - Extract from Record of Proceedi
G18/26
Test Document for Animals
G18/24
Letter to Applicant
G18/23
Decision
G18/4
Insurance - Assurance - Quality - Test Document - Eraser
G18/22
My Document
G18/19
Accounting - Accounting Automatic - Test Document with Links
G98/812
Permit Application to Run Leg of Great Barrier Reef Jet-Ski Challenge in Hir
G18/21
Records Management - Archives / Archiving - Permit Application to Run Leg
G18/20
Records Management - Archives / Archiving - Workbook 1
G18/16
Insurance - Freight - Darwin Test Document
G18/15
Insurance - Freight - Darwin Test Document
G18/13
Records Management - Access - Selection Criteria
G18/12
Records Management - Access - Position Description
G18/11
Records Management - Access - J smith - Employment Application
G18/10
Accounting - Accounting Automatic - Test Document for George
G18/3
Insurance - Assurance - Quality - Application
G99/310
Memorandum - Coastal Resort Development and the Impact on Dugong Pr
G97/770
Greenhouse Journal of Global Warming - Dugong and Manatee Habitats -
G97/502
Doctoral Dissertation - Samantha Greenberg, Faculty of Biology, Townsvill
G97/307
Extract from Chapter 3 Marine Mammals, Matheson C, Oxford Academic Pr
Record Number
D18/1
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
ABC Solicitors
Date Created
11 July 2018 at 15:59
Date Registered
11 July 2018 at 15:59
Container
KK35: Red Pen Test Folder
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+01SC085I002.DOCX
Properties
Notes
Preview
Previous
Rendition
Favorites
Recent
Trays
Miktysh
DemoDB
MIKWIN8-2

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.