



365 | 2CM

BY FYB PTY LTD

The FYB 365|2CM App automatically transfers information from Microsoft 365 and Network Shares into OpenText Content Manager



Using the FYB 365|2CM App will provide the following benefits:



- ▶ Allows users to choose which platform they work from, being SharePoint, Microsoft Teams or Content Manager
- ▶ Streamlines the storage of information created in Microsoft 365 and Network Shares, reducing duplication and versioning issues
- ▶ Eliminate siloed repositories of unmanaged information
- ▶ Ensures you are capturing and managing records in accordance with recordkeeping and other compliance requirements, mitigating risk
- ▶ Provides a central repository for the management of records, thereby making the discovery process faster and more effective
- ▶ Ensures that information being created in repositories such as SharePoint, Microsoft Teams or Network Shares are then able to add value to the business

Version 2.2.X Features

- ▶ Ability to create folder to folder connections from SharePoint, Microsoft Teams and Network Shares into Content Manager
- ▶ Ability to capture Teams Channel posts and Chats into Content Manager
- ▶ Ability to capture documents from OneDrive into Content Manager
- ▶ Assign a Content Manager container that documents will be captured into, configure the default record type and mandatory metadata fields
- ▶ Auto classification for new containers based on the contents of the document library
- ▶ Replicate the folder structure from original source and select the record type to use when creating subfolders within Content Manager
- ▶ Ability to transfer files and lock editing to ensure users edit documents from SharePoint only
- ▶ Map access controls that dynamically update using members of the connected SharePoint site
- ▶ Option to automatically remove documents from the original source once they have been transferred to Content Manager and finalise the record on archive
- ▶ Automatically upload a tr5 reference file and URL link to the original source once the document has been transferred to Content Manager
- ▶ Create new revisions of Content Manager documents that have been updated from the original source
- ▶ Automated statistics email with app usage data

Prerequisites

- ▶ Content Manager 10x, 10.1x
- ▶ Please refer to the FYB 365|2CM page on our website for a detailed list of prerequisites

Terms and Conditions

- ▶ Subscription pricing

Product Comparison	365 2CM	SharePoint Integration Module for Content Manager	Content Manager 10.1 Teams Integration
Manage SharePoint files within Content Manager	✓	✓	✗
Manage Teams files, posts and chats within Content Manager	✓	✗	✓
Manage OneDrive files within Content Manager	✓	✗	✓
Manage Network Share files within Content Manager	✓	✗	✗
Automatic lifecycle management	✓	✓	✓
Replace source documents with TR5 files and URL link after archival	✓	✗	✗
Auto classification for new containers based on the contents of the document library	✓	✗	✗
Map access controls that dynamically update using members of the connected SharePoint site	✓	✗	✗
Transfer files and lock editing to ensure users edit documents from SharePoint only	✓	✗	✗
Connection Management	Centralised within 365 2CM	Requires deployment to each managed site	Configured within Teams
Mapping of Document Set/Folder Structures to Content Manager	Out of the Box	Configuration required	Configuration required
SharePoint Knowledge required	Minimal	Advanced	Advanced