OpenText Content Manager

OpenText™ Content Manager is a governance-based enterprise content management (ECM) system that provides complete information lifecycle management for enterprises across the globe.

This comprehensive, out-of-the-box software solution enables you to effectively manage and collaborate on documents and records, email, web content, images, video, and workflows to achieve business objectives. Content Manager ensures that your information is organized, accessible, and efficiently managed from creation to disposal, extending its value beyond the lifespan of your projects, staff, and business applications.

Product Features	Benefits	24.3	24.2	23.4	23.3	10.1	10.0	9.x and older
Check out record documents to Google Drive®	Users can now check out records on Google Drive. This allows users to collaborate and comply with the business process at the same time.	⊘						
Export search results from within web client	Allows you to export the metadata of the columns displayed in the result set as a.csv file.	⊘						
Ability to add communication and related records	The "Add communication and related records" option is now available in the Record entry form during record creation in the web client.	⊘						
Easier app deployment for Zero Footprint client Microsoft Office®, Microsoft Outlook®, and Microsoft Teams® integration	A new setup script simplifies Microsoft Azure® app creation for Microsoft Teams deployment and Zero Footprint client integrations, reducing manual steps.	⊘						
Zero Footprint (ZFP) Office/ Outlook parity	Functions to auto-populate record type or check-in style for selected attachments in email are available. Additionally, admins can now sync linked folders when opening Outlook configured with the Zero Footprint client.	⊘						
Enhanced drag-and-drop functionalities	The drag-and-drop capability is now more spot aware and electronic documents can be dropped on Explorer objects such as user labels, categories/classifications, or the record list area for records creation with appropriate metadata.	⊘						
Save and switch between different grid view layouts in the web client	Users can save column arrangements for search results in a grid view. Multiple views can be switched quickly from a drop-down in the web client.	⊘	⊘					

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Improved user experience with a better drag and drop and records creation process in web client	Simpler user journey for record creation that supports folder-aware drag-and-drop methods.	⊘	⊘					
Seamless licenses rollover for Select subscription renewals	Future-dated Content Manager Select subscription licenses can be uploaded ahead of the renewal date and are automatically updated when the dates match.	⊘	⊘					
Support for shared channels in the Microsoft Teams Integration App	All functionality of the Microsoft Teams Integration App is now extended to shared channels, including manual and automatic records creation.	⊘	⊘					
Manage in-place capability for Google Drive	Google Drive can be used as a source repository for manage-in-place with Content Manager.	⊘	⊘					
OpenText™ IDOL™ Enterprise and Content Manager auto-classification	Content Manager can now auto-classify records directly into IDOL Enterprise.	⊘	⊘					
Mobile app redesign	Adopted OpenText UI standards, updated to a newer framework, and delivered a better user experience.	⊘	⊘					
Redaction and annotations	OpenText™ Brava™ integration delivers more features in these areas, including new redaction and annotation interfaces with search hit highlighting.	⊘	⊘	⊘				
Viewing and rendering, and space optimization	OpenText™ Blazon™ integration supports more file types and features in the viewing panel, as well as a better compression algorithm. Brava supports redaction on more file types, without heavy.tiff requirements.	⊘	⊘	⊘				
Auto-Redaction with customizable scripts	Brava offers Auto-Redaction for identifying and redacting sensitive information based on pre-defined and customizable templates. All your PII can be pre-identified and redacted.	⊘	⊘	⊘				
Microsoft Teams: Private Channel support and subject line captured	The Microsoft Teams Integration App now supports Private Channel posts and files for automatic and manual records filing. The Subject Line field can now be captured from archived posts, and "title" of records pre-populated.	⊘	⊘	⊘				

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Enhanced drag and drop in the web client	Drag and drop supports smaller drop zones in WEB UI, offering the ability to drag and drop into containers or categories.	✓	✓	✓				
Support for Net 4.7.2 framework	Version currency for.Net framework support.	✓	✓	✓				
Microsoft Teams: Work with Multi Content Manager datasets	Drop-down allows users to easily manage multiple Content Manager datasets from the one Teams interface. All data across various datasets can be viewed from Teams. Records can be created and added to different datasets all from one interface.	✓	✓	✓	✓			
Manage Microsoft SharePoint® via Microsoft Teams Integration App	Browse and create records from the SharePoint library. Access SharePoint sites and libraries quickly via the Microsoft Teams Integration App. This is a quicker method of access as compared to the traditional configuration and setup of SharePoint integration, which offers more controls.	✓	✓	✓	✓			
Microsoft Teams: New features	Expose records from the Content Manager into Teams. Sync icons for managed in-place items to let you know if the record is up to date. More record actions are exposed in the Teams integration (for example: launch a workflow).	✓	✓	✓	✓			
Mobile App: Upload	Upload using check-in styles and attach to an existing record.	✓	✓	✓	✓			
Mobile App: Edit and collaborate on the move	Add, modify, and share content: iPad® and tablet compatible, edit record metadata, share records, sort search results	✓	✓	✓	✓			
Mobile App: Secure with MDM	Mobile Device Management (MDM) support for organizational compliance. Session timeouts protect against unauthorized access. Downloads are securely stored.	✓	✓	✓	✓			
WEB UI check out and edit from Microsoft Edge®, Google Chrome™, and Mozilla Firefox™	Check out and edit records from these web browsers without having to download anything. Smoother check out and edit from WEB UI.	✓	✓	✓	✓			
SharePoint Modern Interface support	Traditional SharePoint integration can now be deployed on SharePoint ecosystems with Modern Interface	✓	✓	✓	✓			

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Manage-in-Place: Amazon S3™, Microsoft Azure blob store and Microsoft Graph API Drive (Microsoft Office and Microsoft Teams)	Supported as manage-in-place repositories, to manage records without moving your data from source repositories, thus reducing data migration activities.	✓	✓	✓	✓			
Manage-in-Place: Document Queues and backup	Document Queues now work for managed in-place repositories. New optional backup copies of managed in-place records can allow access to past versions if file is modified or lost in original repository.	✓	✓	✓	✓			
Office Online integration	Office Online Integration supports: Addition and removal of User labels, add or remove contacts on Records, and Record relationships.	✓	✓	✓	✓			
Multitenancy support in Service API	Documentation update for multi-tenant configuration support in Service API.	✓	✓	✓	✓			
Automatic Container creation from dates	Automatic Container creation based on Calendar or Finance dates.	✓	✓	✓	✓			
SQL Text indexing and performance improvements	Performance improvements. New option for bulk copying of notes and text fields during complete SQL Text reindexing, new option to select the word-break language in text reindexing. New option to Redistribute Events evenly when reassigning from a workgroup server.	✓	✓	✓	✓			
Support for ODBC driver 18	Version currency for ODBC drivers.	✓	✓	✓	✓			
Mobile app for search and collaboration	Quick search, update, and collaboration experience for offline users and remote workers in the mobile app. Available for iOS® and Android™.	✓	✓	✓	✓	✓		
Web client Grid view for search results	Part of our user experience initiative and new WEB UI investment. This view works more easily with bulk data operations.	✓	✓	✓	✓	✓		
Manage-in-place with OpenText™ Voltage™ File Analysis Suite	Ability to govern the lifecycle in Content Manager without moving data from the source. This is less disruptive and doesn't require large data migration.	✓	✓	✓	✓	✓		
Microsoft Teams integration	Archive chats and files automatically from Microsoft Teams with admin-defined classifications.	✓	✓	✓	✓	✓		

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XDMS (External Document Management System) integration	A new external identifier for records, which links with an external document management system to avoid orphaned records with a confirmation loop closure.	✓	✓	✓	✓	✓		
Filesystem manage-in-place	A new filesystem document store that creates records and manages organizational data without moving them from source.	✓	✓	✓	✓	✓		
AMAZON WEB SERVICES (AWS) Storage— New authentication options	Support Amazon Security Token Service (STS) and EC2 Instance Metadata Service (IMDS) to connect to Amazon S3.	✓	✓	✓	✓	✓		
Compliance and certification	Supports Regular Document Store to SEC Compliant Store migration. Meets the Public Record Office Victoria (PROV) Version 3 VERS Encapsulated Objects (VEOs) compliance.	✓	✓	✓	✓	✓		
Multi-user collaboration using Microsoft OneDrive®	Checkout directly to OneDrive from web client and desktop client for multi-user collaboration.	✓	✓	✓	✓	✓	✓	
Microsoft 365 support	Support the newer Microsoft 365 Online.	✓	✓	✓	✓	✓	✓	
Monitoring dashboard for SharePoint integration	Single point dashboard in Content Manager and SharePoint integration to monitor data ingestions.	✓	✓	✓	✓	✓	✓	
Customizable icons and ribbons	Allows replacing icons in Content Manager client with customized ones.	✓	✓	✓	✓	✓	✓	
Lightweight records for faster disposition	Records with minimal metadata and associated retention/disposition calculation process aid in faster disposition.	✓	✓	✓	✓	✓	✓	
SaaS model availability	Introduction of Content Manager in a hosted environment (-as a service).	✓	✓	✓	✓	✓	✓	
Subscription model licensing availability (Content Manager Select)	Introduction of Subscription model along with existing perpetual license.	✓	✓	✓	✓	✓	✓	
Web client feature to drag-and-drop for multiple record creation	Drag-and-drop multiple files for creating multiple records in a single shot.	✓	✓	✓	✓	✓	✓	✓

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Custom logo support	Support for replacing the Content Manager logo with the customer's own.	✓	✓	✓	✓	✓	✓	✓
Content Manager Explorer	The new Explorer window gives users a hierarchical view of records grouped within Content Manager item types in a single window.	✓	✓	✓	✓	✓	✓	✓
Event-based archiving and Recycle Bin support	Archiving rules now support an event with a time-based trigger.	✓	✓	✓	✓	✓	✓	✓
Multi Approvers and digital sign approval support	Records Approver can be in multiple locations and support the requirement of a digital signature.	✓	✓	✓	✓	✓	✓	✓
New Content Manager Dashboard	The Dashboard allows users to access a pre-defined granular work item list, including a summary item for each work item list.	✓	✓	✓	✓	✓	✓	✓
Recycle Bin for erroneous records	This feature allows end users to send a record or a selection of records to Recycle Bin, reviewed by an Administrator for further action.	✓	✓	✓	✓	✓	✓	✓
Visitor access without a license impact	In Content Manager 9.4. it is possible to register users as visitors without requiring an MSP license.	✓	✓	✓	✓	✓	✓	✓
Automated rendering improvements	Two new options have also been added to facilitate the automatic creation of PDF/OCR renditions.	✓	✓	✓	✓	✓	✓	✓
Simpler update experience with Records metadata	Managing Records metadata is simpler with the introduction of several useful functions to update title, record no., and locations.	✓	✓	✓	✓	✓	✓	✓
OpenText™ ArcSight™ integration for advanced auditing	As part of the Audit options, Content Manager 9.3 can produce log files in Common Event Format that can be ingested by ArcSight (or other industry standard log ingest systems).	✓	✓	✓	✓	✓	✓	✓
Micro Focus design themes	This release of Content Manager introduces a fresh visual style reflecting the brand Micro Focus.	✓	✓	✓	✓	✓	✓	✓
MS Office document edit with web client	Launch electronic documents with MS Office from within the web client.	✓	✓	✓	✓	✓	✓	✓
Web client support for Knowledge worker function	Supports multiple datasets and disposition management with approval from within Web client.	✓	✓	✓	✓	✓	✓	✓

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Elasticsearch® Infrastructure support	Elasticsearch is a NoSQL database that provides an open-source modern search and analytics engine based on Apache Lucene™.	✓	✓	✓	✓	✓	✓	✓
SQL Server (Microsoft Azure and SQL 2016/2017) and Amazon RDS support	Support for the latest version of Microsoft SQL Server® at the time.	✓	✓	✓	✓	✓	✓	✓
Capstone Support with email management	The Capstone Approach is a method of email management that bases appraisal and scheduling on the account owner's role or position rather than individual email content, as a means of simplifying and automating management.	✓	✓	✓	✓	✓	✓	✓
Multitenancy support	Manage several databases and data stores within Content Manager keeping information private from each other.	✓	✓	✓	✓	✓	✓	✓
Microsoft Active Directory® Synchronization	Content Manager (CM) synchronizes and maps users/groups from Active Directory via LDAP.	✓	✓	✓	✓	✓	✓	✓
Geographical Information System (GIS) support	Auto-extracts GPS Location information from within images, if available, to allow search using polygons and points.	✓	✓	✓	✓	✓	✓	✓
Advanced search/ Form builder	Build pre-set forms for a records search. Advanced search provides the option to create granulated search results.	✓	✓	✓	✓	✓	✓	✓
Lifecycle management policies and rules-based management for SharePoint	Automate the capture and management of valuable content and records without impacting users. A set of conditions defined to identify valuable content, and records met with a further set of instructions for object creation in Content Manager.	✓	✓	✓	✓	✓	✓	✓
Enhanced Search and Record management with web client	New records actions, location actions, enhanced search, pagination, and thumbnail support in web client.	✓	✓	✓	✓	✓	✓	✓
Cloud readiness	Workgroup server connection via HTTPS, authentication, ADFS, Google Apps Authentication.	✓	✓	✓	✓	✓	✓	✓
Microsoft Office® Support	Integrates with Microsoft Office productivity suite for version 2013/2016 and Office 365.	✓	✓	✓	✓	✓	✓	✓

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Auto-classification and OCR Module support	Classification based on Records metadata and content index keywords.	✓	✓	✓	✓	✓	✓	✓
Advanced disposal process	Enables simple identification of records due for disposal with a consignment that carries out prescribed disposition actions.	✓	✓	✓	✓	✓	✓	✓
Client-Matter structure support	Folder concept that uses a Master detail type relation, such as an employee (Master) and jobs the employee holds as sub-folder.	✓	✓	✓	✓	✓	✓	✓
Tiered storage	TRIM allows defining separate storage based on record type.	✓	✓	✓	✓	✓	✓	✓
Iron Mountain® Warehouse and Policy Center Integration	Integration with Iron Mountain and Iron Mountain Policy Center to allow TRIM work with physical paper records.	✓	✓	✓	✓	✓	✓	✓
Re-designed desktop client	Modern looking desktop client.	✓	✓	✓	✓	✓	✓	✓
Control Point integration	Control Point, an in-house product, provided identification, classification, and manage-in-place capabilities for unstructured data.	✓	✓	✓	✓	✓	✓	✓
Microsoft SharePoint integration	SharePoint (SP) from Microsoft is a tool for sharing files and collaborating within a company's intranet. TRIM can archive files from SP.	✓	✓	✓	✓	✓	✓	✓
Multi-Jurisdiction retention	Multi-jurisdiction retention works to implement retention schedules that behave differently under different regulatory mandates, e.g. across different geographies.	✓	✓	✓	✓	✓	✓	✓
PDF/A Support	PDF/A is an ISO standard for archiving and long-term storage of electronic records.	✓	✓	✓	✓	✓	✓	✓
Full content indexing	Indexing record content for free-text search.	✓	✓	✓	✓	✓	✓	✓
OpenText™ IDOL™ search engine support	Support for IDOL server to index content stored with records.	✓	✓	✓	✓	✓	✓	✓
64-bit client architecture	TRIM client available in 64-bit architecture.	✓	✓	✓	✓	✓	✓	✓

✓ Features available in this version