

OpenText Content Management Enhancement Packages

by OpenText Professional Services



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Introduction

The OpenText Professional Services organization has extensive experience working with thousands of OpenText customers deploying OpenText products to ensure maximum value is achieved. From more than two decades of delivering consulting projects, the organization has developed numerous tools and product enhancements.

OpenText Professional Services leverages these tools to support further use cases while reducing implementation times and minimizing any potential project risks.

The enhancement packages support different scenarios including:

- Migration of data into OpenText applications.
- Integration of OpenText applications with other applications.
- Functional enhancements to OpenText applications.
- Ease of deployment of OpenText products.

OpenText Content Management Enhancement Packages

This guide provides an overview of various functional enhancements that have been created for OpenText™ Content Management products.

The scope of these functional enhancement packages covers aspects from ease of operations, international deployments and security, to business level enhancements such as online access to other databases or management of complex document templates.



OpenText Content Management Enhancement Packages

Adaptive Move permissions

Use case

When the default handling of ownership and permissions when objects are moved are not reflecting the business need.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

Handling of permissions when moving objects can be defined individually or configured globally.

Customer value

Allows the flexible setting of file ownership and permissions on moved objects.

Features

Changing how target permissions are set

- With the new functionality, moved objects and their sub-objects will inherit the owner of the destination container. Without the new functionality, the standard OpenText Content Management “move operation” is used and the moving user takes ownership of the moved object.
- Valid for all permission settings—owner, owner groups, public access and assigned groups and users.

Flexible handling of ownership

- On move, a checkbox is displayed to choose if either the owner is unchanged (system default) or the object inherits the owner from the target. This option is also globally adjustable at the administration page. information so it can be managed transparently throughout its entire lifecycle.

Administration group with the option to use standard behavior

- Members in the configurable administration group can choose between the standard behavior and the behavior implemented by the module.

All users have the option to use standard behaviors

- Every user can choose between the standard behavior and the behavior implemented by the module.

Activate or deactivate functionality

- The functionality of the module can be completely enabled or disabled by a system administrator

Card File

Use case

Consistency of information in OpenText Content Management is required for external data, such as Company Director or Contract Information.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

The Card File Attribute allows for assigning values to attributes from a database table or external application via the CardFile framework.

Customer value

- Assures data consistency between OpenText Content Management and leading system.
- Improves usability and facilitates use of external reference data.

Features

CardFile Attribute

- The CardFile Attribute allows for assigning values to attributes from a database table or external application via the CardFile framework. This provides a flexible way to change “allowed” values without the need to change the category definition.
- CardFile Attributes can be used in categories, forms, and workflows.

CardFile OpenText Content Management Connector

- The module CardFile OpenText Content Management Connector leverages the predefined OpenText Content Management business object search to retrieve information from SAP or Oracle.
- With the add-on module CardFile OpenText Content Management Connector, it is possible to assign attributes values to workspaces that are not linked to the leading application.
- With OpenText Content Management for SAP solutions, CardFile can display all data from SAP available via Remote Function Calls (RFC).

Extensions

- CardFile can be extended to implement custom functions that run on one or multiple items in the result set, or to change the presentation of data and/or search forms.

Menu configuration

Use case

Arrangement of menu entries is perceived as not suitable for end-user requirements.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

Any menus, like function, global or personal menus, can be adapted to user needs by rearranging or deactivating menu items.

Customer value

Improves usability and facilitates user adoption.

Features

Configure function menus

- Provides the ability to customize the view of function menus. It is possible to change the order of elements on the OpenText Content Management function menus or even disable them.
- Regular expressions can be used to determine availability of items.

Configure global menu items

- Elements of the global menu can be disabled.

Configure personal setting tabs

- Items within the personal menu can be disabled.

Functions overview

- Supports multiple processing operations on objects managed within OpenText Content Management.



Multi-processing

Use case

Various administrative tasks to be performed on multiple objects, often on a regular schedule.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

Multi-processing supports multiple processing operations on objects managed within OpenText Content Management.

Customer value

Facilitates daily administrative tasks.

- Multi-processing actions can be used in workflows within the Item Handler object.
- Provides the ability to trigger non-recurring and periodical actions on objects.
- Supports multi-threaded agents. On the admin page, number of threads, recurrence and sleep intervals can be configured.
- All actions performed by the module can be rolled back if performed in error.

Available actions

- Standard OpenText Content Management operations: List items or sub-items, create, copy, rename, move or delete objects.
- The action to add or remove a category or define the behavior for category inheritance.
- The ability to manage attributes.
- The action to add or remove a classification.
- The action to change the classification inheritance behavior.
- The action to add, remove or overwrite an eLink.
- The action to initiate workflows.
- The action to set a nickname for an object.
- The action to work with Access Control Lists (ACL's).
- The action to add or remove role members in a project.
- The action to set/remove Security Clearance levels and Supplemental Markings.
- The action to work with Records Management metadata.
- The action to execute a LiveReport.
- The action to move objects between different storage providers.
- The action to modify objects based on a LiveReport result, name or specific type.
- Delete or make renditions by rule or type.

Multilingual extensions

Use case

When using multiple languages in an OpenText Content Management environment, attribute names and values are available in only one language causing inconsistency in the users experience.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

This module provides the ability to define Multilingual attribute names. It also introduces a new attribute type which can hold multilingual attribute values.

Customer value

Facilitates user adoption and improves control over data integrity.

Features

- Offers the possibility to display the name of an attribute depending on the user's personal settings for the metadata language.
- Provides a new attribute type (Text: Multilingual Pop-up) which can hold multilingual attribute values depending on the user's personal settings for the metadata language.
- Supports the use of multilingual attribute names along with the new attribute type (Text: Multilingual Pop-up) within the Smart UI. In addition the new attribute type is supported with facets, columns and search.



Restricted categories

Use case

- OpenText Content Management permission model is not sufficient to ensure data consistency for critical metadata entries.
- Users disregard mandatory entries by removing categories.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

- Additional control in the use of categories.
- Specify the group of users allowed to change a category's attribute values.
- Restrict users from removing a category from an item.

Customer value

- Improves control over data integrity.
- Ensure data consistency between OpenText Content Management and other lead applications.

Features

The Restricted Categories module adds a layer of control to the use of OpenText Content Management categories.

- Provides categories with an additional level of control beyond the standard document permissions.
- The following permissions are available for every category attribute:
 - Unrestricted
 - Editable by system administrators
 - Editable for group members
 - Read-only for group members
 - Read-only for all users
- If the value is set to "Unrestricted," access to the category is defined by the standard OpenText Content Management permissions.
- When OpenText Content Management is installed, additional functionality is available so the attributes provided by the lead application cannot be changed.

OpenText Content Management Configuration FasTrak

Use case

A bundled offering of several service packages that simplify and support the work of OpenText Content Management Administrators. It gives more control over end-user actions and permissions while providing extended integrations with external data.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

The OpenText Content Management Configuration FasTrak provides a comprehensive set of tools to support the integration of lead applications with the OpenText Content Management products.

Customer value

Reduced administration overheads and improved quality, security and compliance of the integration configuration.

Features

This FasTrak packaged service contains the following enhancement modules:

- OpenText Content Management Toolkit
- Multi-Processing module
- Restricted Categories module
- CardFile module and OpenText Content Management connector

OpenText Content Management Toolkit

Provides additional features in the use of OpenText Content Management:

- Supports unique naming of configurations such as templates, classifications and storage locations
- Allows the creation of a sub-location path based on the current date
- Prevents rename, move and deletion of workspace items that come from the template
- Shows the complete definition of a workspace template on a single HTML page

Group notification

Use case

Notifications are requested to be distributed to groups of users, not only on a personal level (as in the standard).

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

The Group Notification module extends the personal notification functionality of OpenText Content Management. Group owners are allowed to set user interests on behalf of a group.

Customer value

- Allows the ability to ensure proactive notification to relevant users when a defined event takes place within the system.
- Facilitates enhanced configuration and administration of notifications.

Features

The Group Notification module provides an extension to the personal notification functionality of OpenText Content Management.

- Group owners are allowed to set user interests on behalf of a group.
- Group Notification can be set for all members of a specific group.
- Group Notification messages are sent to an additional tab labeled 'Group Notification' in the users interest page.
- Users can configure their individual delivery settings for their groups.
- Both specific and general interests can be set.



Rendition add-on

Use case

Additional rendition requirements are needed above the standard OpenText Content Management features.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

The Rendition Add-On module allows all types of volumes, folders and documents to be rendered, or subscribed for rendition.

Customer value

Meet compliance requirements beyond the standard OpenText Content Management rendition capability by supporting additional data types.

Features

Using the Renditions Add-On module, it is possible to enable all types of volumes, folders and documents for the “Make Rendition” and “Subscribe to Rendition” functionality.

The tool provides a wide selection of additional object types that can be rendered or subscribed to be rendered.



Secure permissions

Use case

Sensitive documents need to be strictly protected, even from access by Administrators.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

Secure Permissions allows for the restriction of access to objects for all users based on a given criteria, preventing access to sensitive information by non authorized users.

Customer value

Increased security and compliance for business critical information, e.g., HR or board documents.

Features

This module allows the restriction of access to objects based on a given criteria to prevent intentional or accidental viewing (e.g., search results) or manipulation of sensitive information.

The filtering criteria for access restrictions include:

- Objects in certain locations
- Documents in defined Storage Providers
- Items with a certain Security Clearance level assigned
- Objects with specified Sub-Type
- Items with Supplemental Markings applied

Common scenarios:

- Board documents require additional protection
- HR documents that hold personal information need to be restricted
- Separation of administrative and “normal” activities of employees



Virtual Dossier Manager

Use case

Need to manage complex and in-depth documents structures, e.g., for submissions or data-books.

Preconditions

Can be used to enhance any OpenText Content Management implementation.

Solution

Virtual Dossier Manager allows the organizing of documents into any configurable virtual structure as defined within the metadata of the document.

Customer value

The Virtual Dossier Manager supports business users in assembling documents from various locations in OpenText Content Management into a defined virtual structure.

Features

Virtual Dossier Manager organizes documents into any configurable virtual structure via structural information within the metadata of a document.

- One document can be part of various virtual structures
- Only metadata needs to be configured on the document to make it part of virtual structures
- Documents which are relevant for one project may be distributed within the OpenText Content Management workspace and underlying structures
- Documents are checked for Virtual Dossier relevance at creation, (metadata) change or deletion

Publishing functions

- Various output formats
 - PDF - merging all the individual documents selected in the pre-publish phase are published into a single virtual dossier
 - ZIP-file - reflecting the structure of the chapters and documents
 - Excel-Sheet - listing the collected object names and metadata
 - Compound Document - Creating an OpenText Content Management compound document that represents a folder structure in a parent child hierarchy along with the documents that are controlled by the virtual dossier
- Detailed reporting on published structures
 - For every publication, report the structure elements, content, conversion status, publisher and more
 - For every document - provides evidence of which document versions were used in published structures
- Reload of existing publications for later use
- Details of each publication are stored in the database for audit purposes

Resources

OpenText CEO Mark Barrenechea's blog

[Read the blog ›](#)

[X \(formerly Twitter\) ›](#)

[LinkedIn ›](#)

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: opentext.com.

Conclusion

For more information on OpenText Content Management Enhancement Packages, please [contact us](#) or [visit our website](#).