



**eDOCS DM 5.3**

# Agenda

- DM 5.3 Overview
- Microsoft Office 2010
- File Type Enhancements
- Lowering Cost of Ownership
- Deployment Enhancements
- Architectural Enhancements
- Miscellaneous

# eDOCS DM 5.3 Overview

# eDOCS DM 5.3.1 SP2 Released

- The eDOCS DM 5.3.1 software is scheduled to be released by November 15.

# Open Text Document Management, eDOCS Edition (eDOCS DM 5.3)

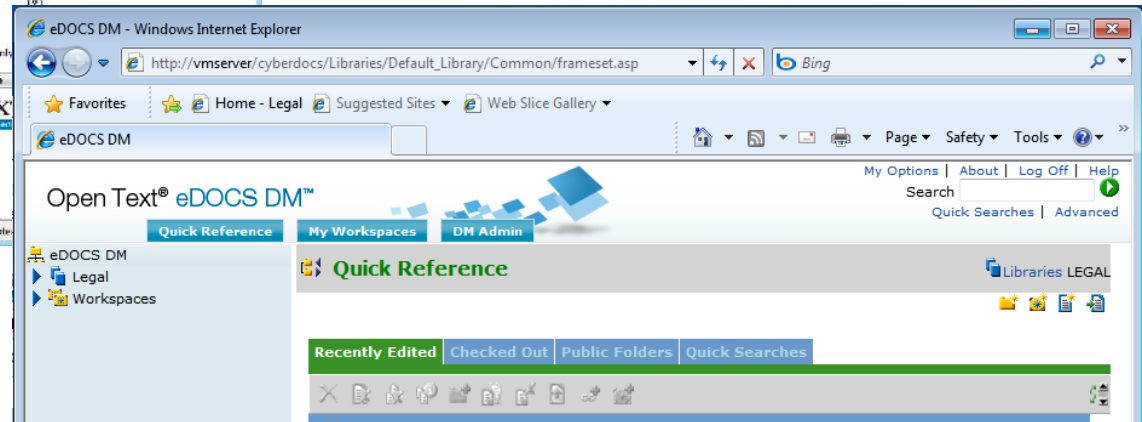
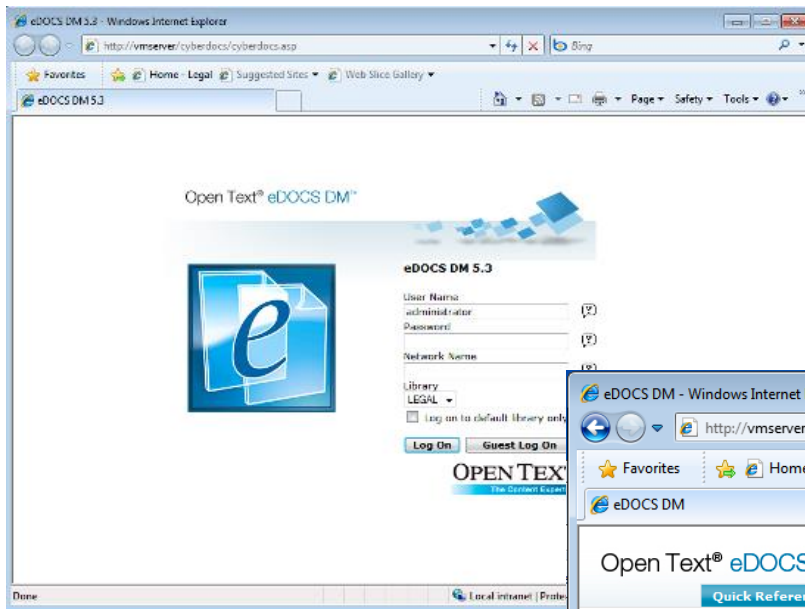


eDOCS DM

- Delivering enhanced application and platform support
- Creating easy to deploy client and server-side installations
- Broadening support for multiple file extensions
- Creating seamless usage of the Save User Interface throughout
- Supporting multiple communication protocols

# eDOCS DM 5.3 Webtop

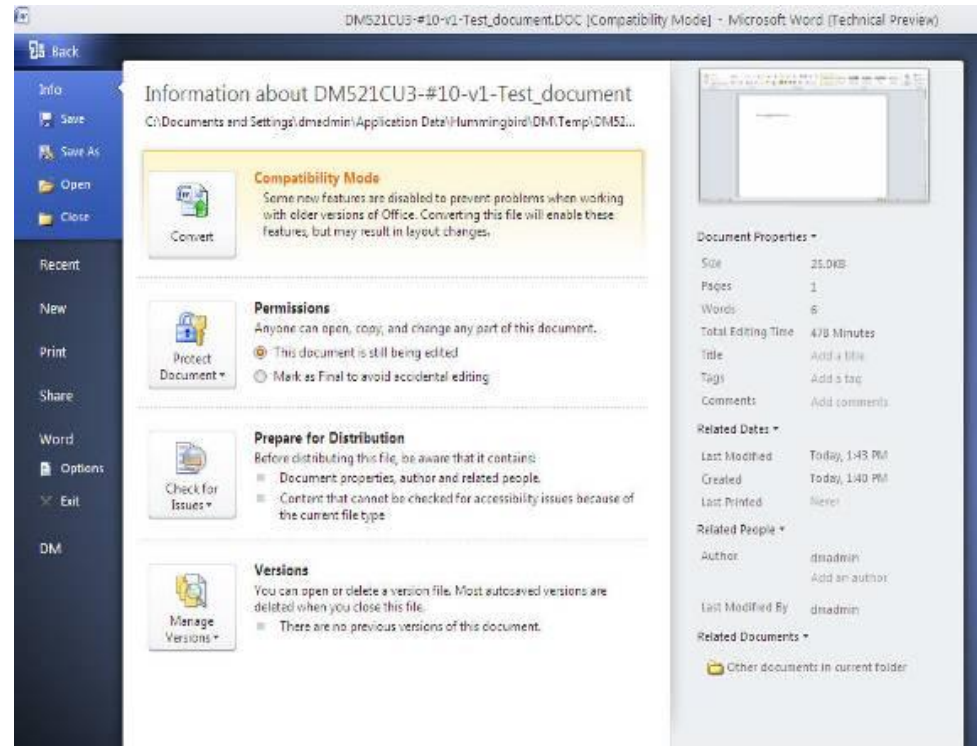
- Rebranded to Open Text



# Microsoft Office 2010

# Microsoft Office 2010 Integration

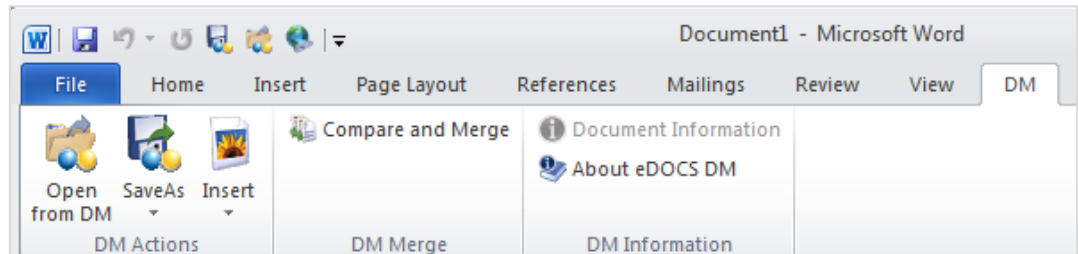
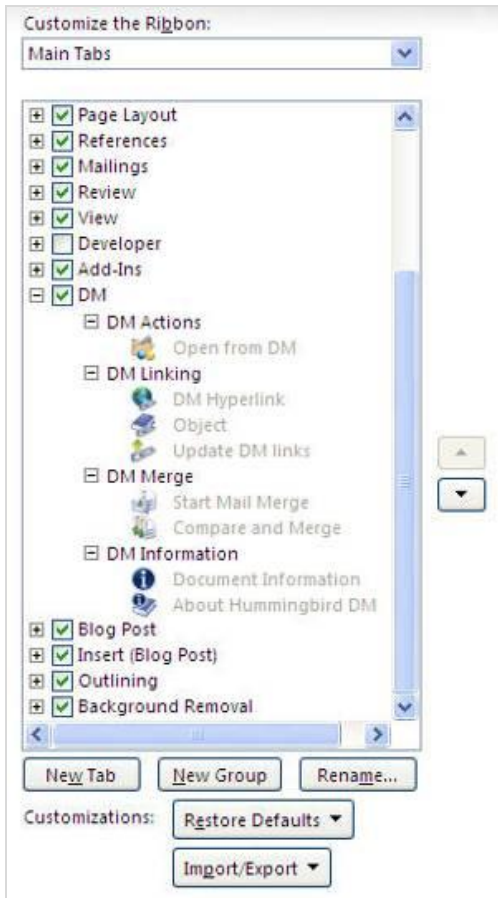
- New Integration designed from the “ground up”
- Integration files independent of previous versions of Office
- Movement from ODMA and COM add-ins for the previous releases to Microsoft’s VSTO only for this release



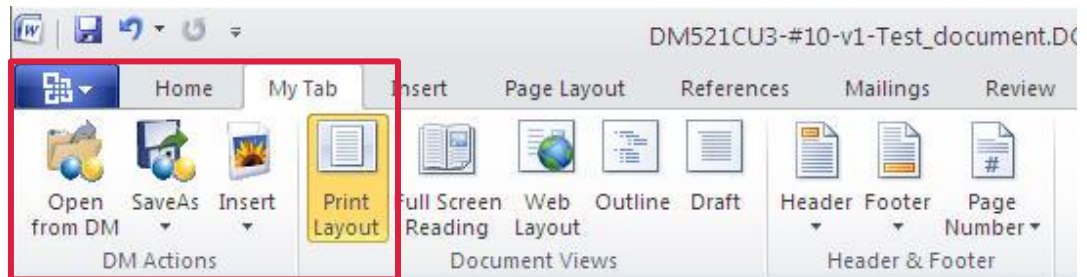
Integration into the Microsoft Backstage



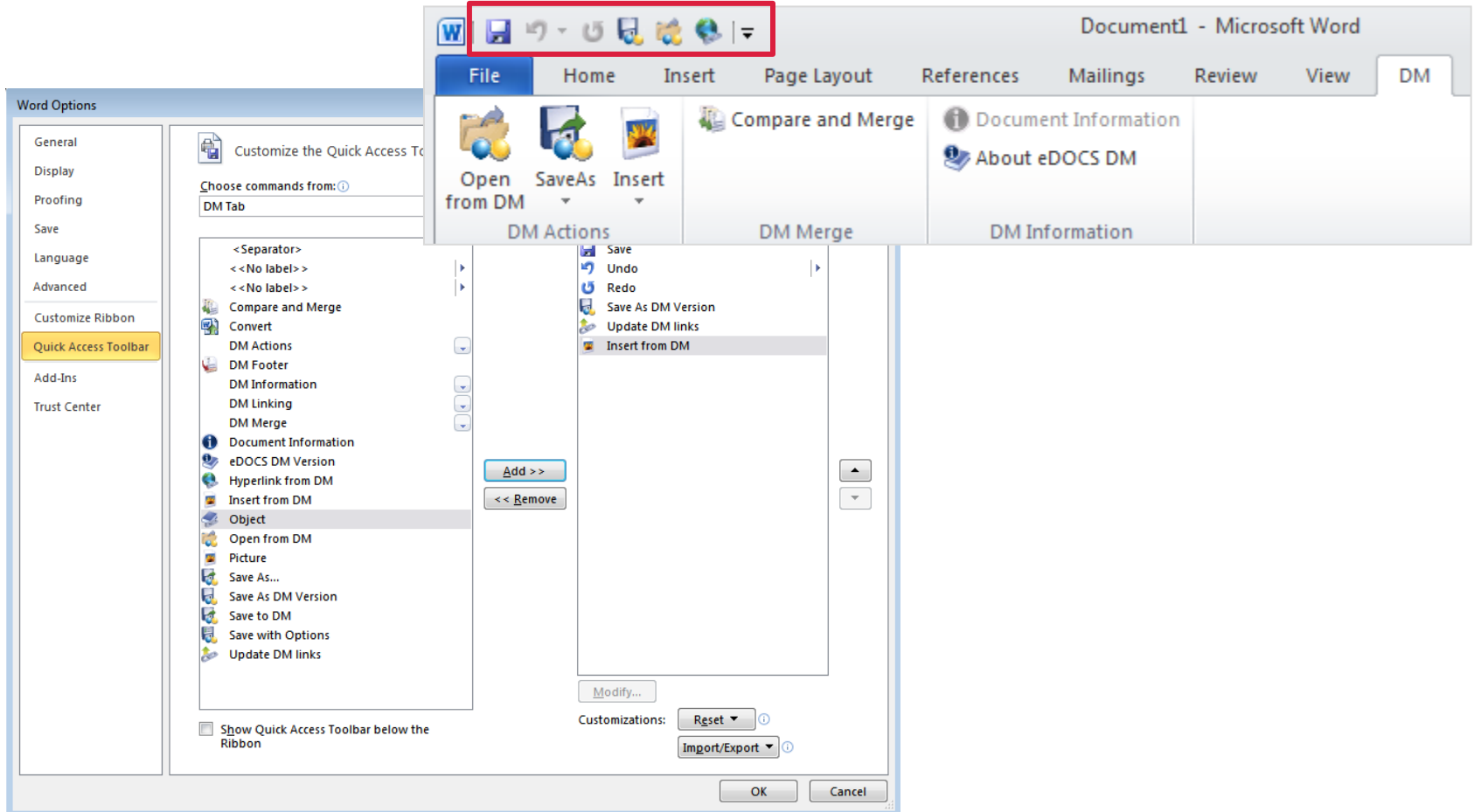
# Customize Your Experience



Create your own eDOCS DM Ribbon

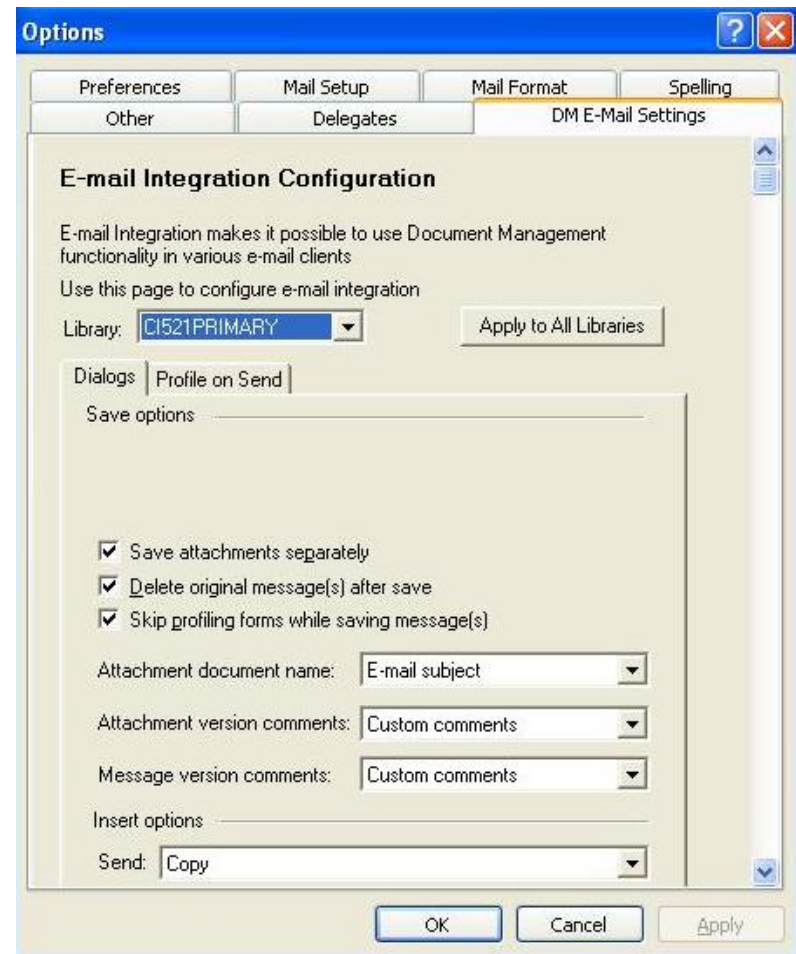


# Quick Access Toolbar (QAT) support



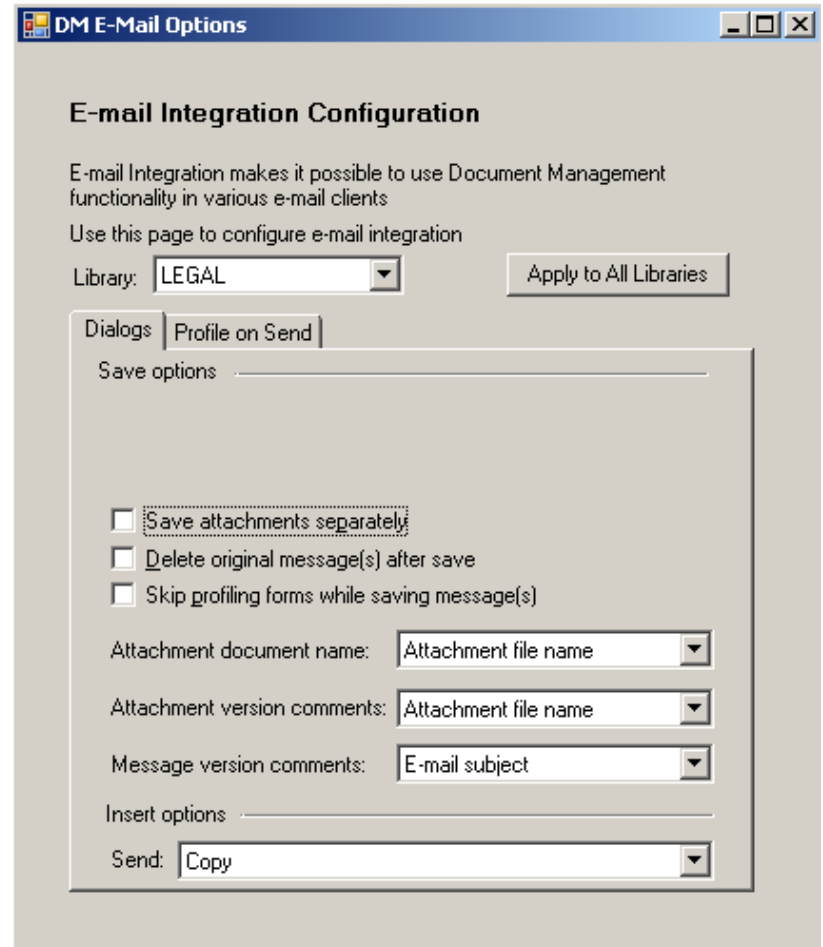
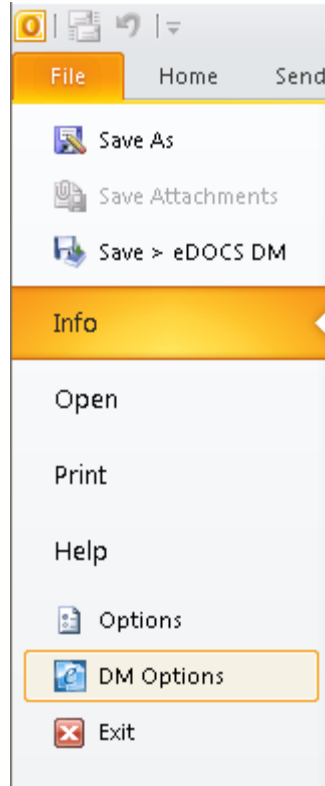
# Outlook 2007

- Ability for users to configure their eDOCS DM Email settings from the Outlook options tab
  - Users can now dynamically update their settings, choosing to save attachments, how to save them: with the message or separately into eDOCS



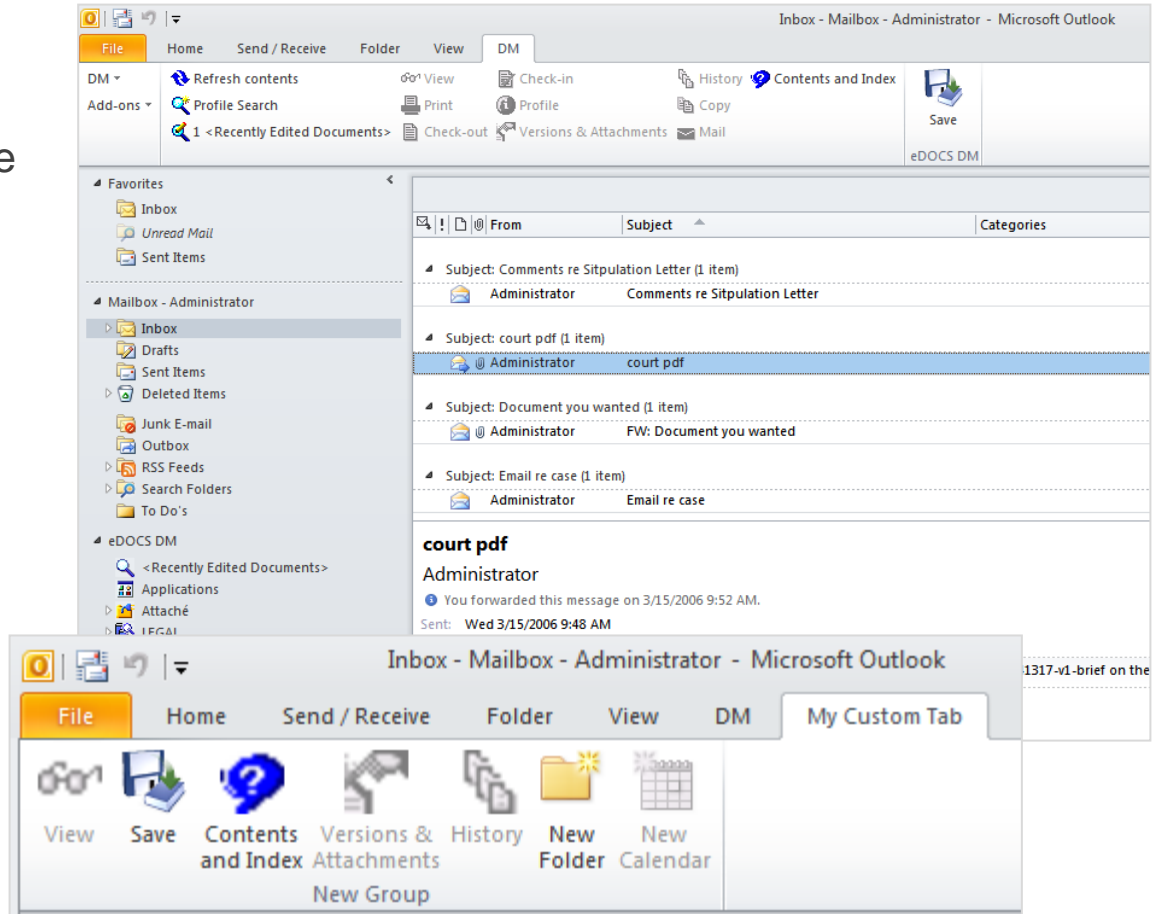
# Outlook 2010 Email Options

- The DM Options to configure email options is available in the Backstage interface



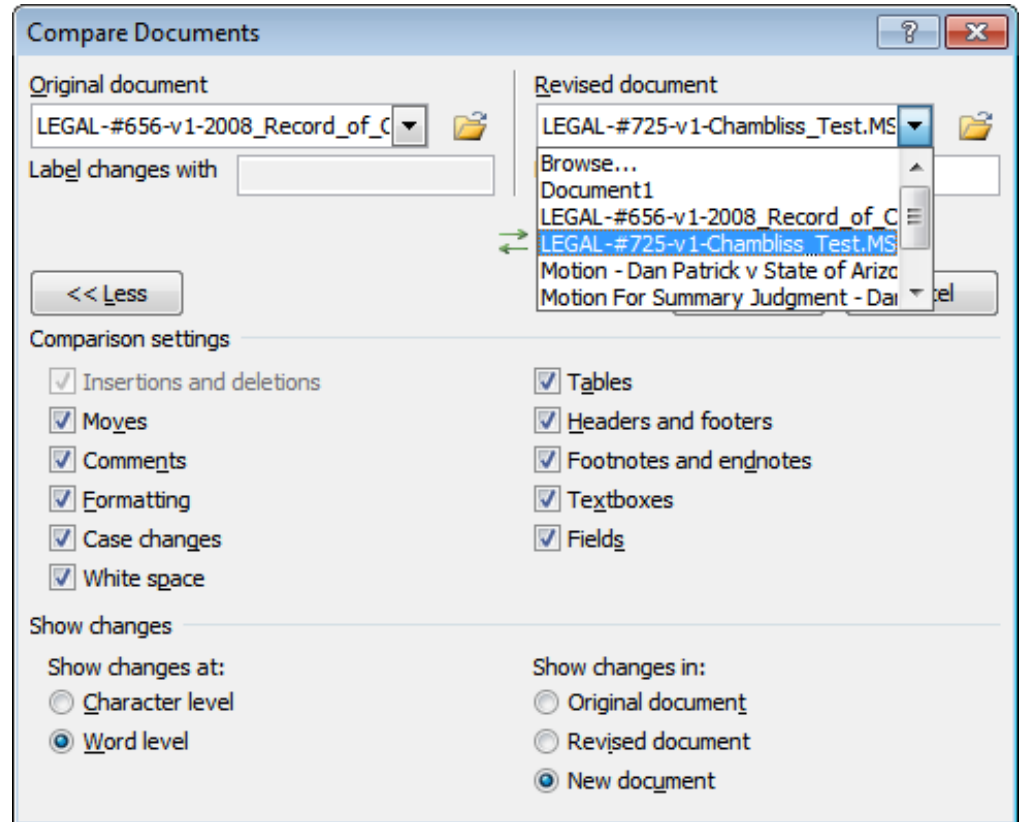
# Microsoft Outlook 2010

- eDOCS DM Commands are active when the eDOCS node is not selected
- eDOCS DM node can be renamed
  - My eDOCS DM Project...
- Integration with the Quick Access Toolbar and Custom Tabs



# Compare and Merge (2007/2010)

- No longer provide an eDOCS custom dialog
- Integration with the Native compare dialog brings up a Quick Retrieve when selecting the Open Icon or Browse action.



# File Type Enhancements

# Multiple File Types Support

## Problem

- Our customers want to save documents which are outside the two file formats currently supported for each Office application: Word, PowerPoint and Excel.
- We need to be able to provide the ability to save documents which is closer to the native Office save experience.

## Solution

- We have designed the ability for both Office 2007 and Office 2010 to save and open file types which have not been previously supported with eDOCS
- This will mimic the native save dialog that appears in native Office save dialogs.

## User Scenario

- Angela receives a CSV file via email from a client with some accounting data. She needs to include her department information, so she opens the file, makes her edits and chooses save. The eDOCS save dialog opens and from the drop-down she chooses to save the document as an .xlsx file. The document is converted and saved into her document library.





# How does it work?

- Library generator populates the database with a table: File\_Types\_Extns
  - Defaults are populated with native based single file types from each application
  - Most file extensions are disabled by default to allow for easy configuration after installation







**Validation Tables** Library: GOWADMIN

Validation Tables >> Applications >> MS EXCEL >> File Extensions

[Applications](#) | [Document Types](#) | [Other Tables](#) | [Dynamic Views](#) | [Level Searches](#)

 Add 
  Close

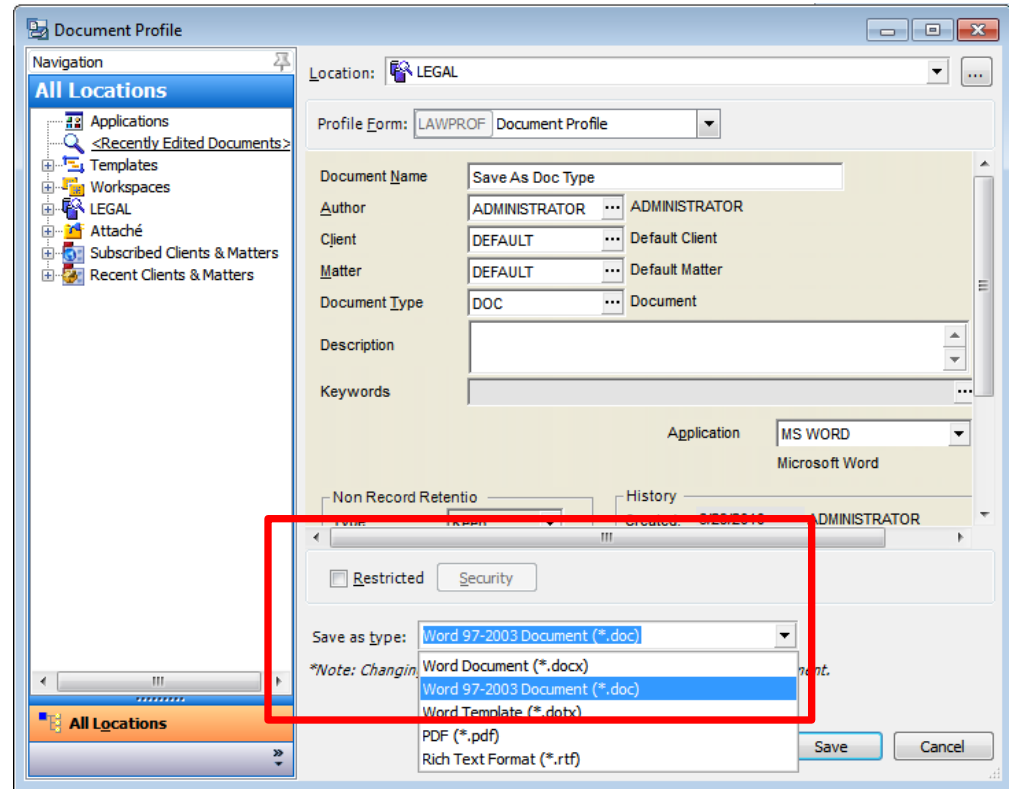
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File Extension	Description	Edit	Delete
XLS	MS Excel 2003		
XLT	MS Excel Template		
XLSX	MS Excel 2007		

# Multiple File Types Support

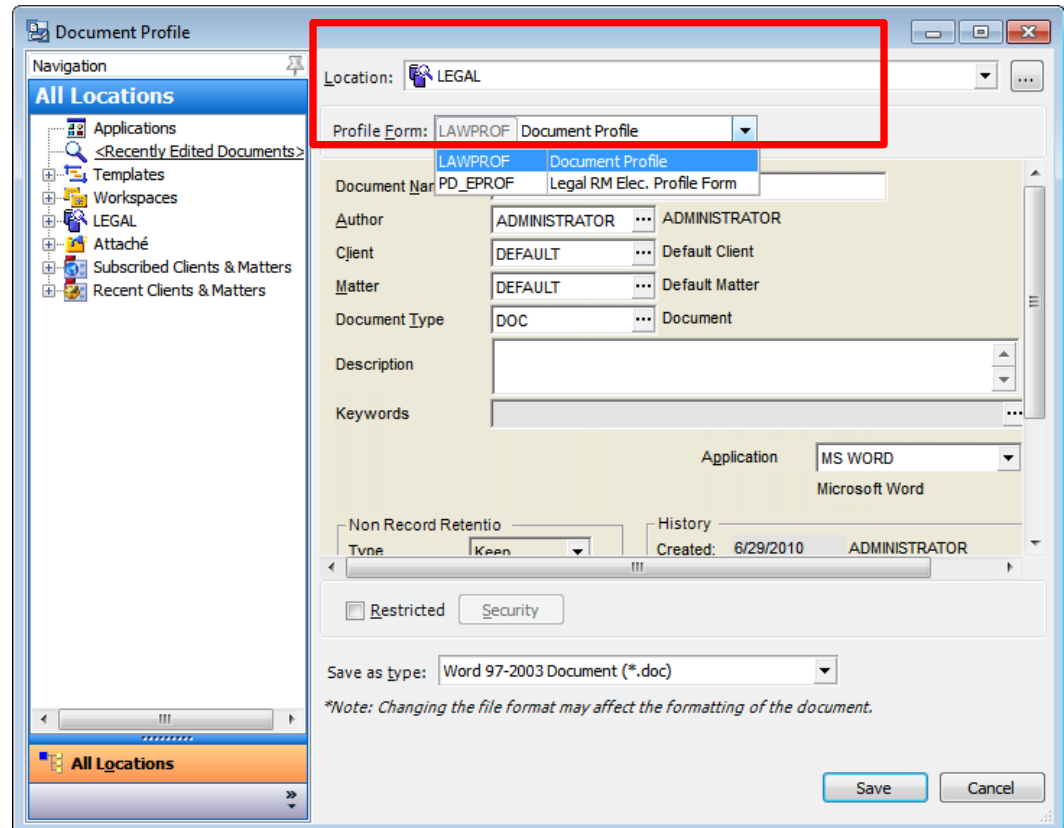
## On the profile form

- New dropdown to select document format
- New Documents will default to the libraries default extension for the application
- Documents which have already been saved will default to the file extension and format in which the document was originally saved



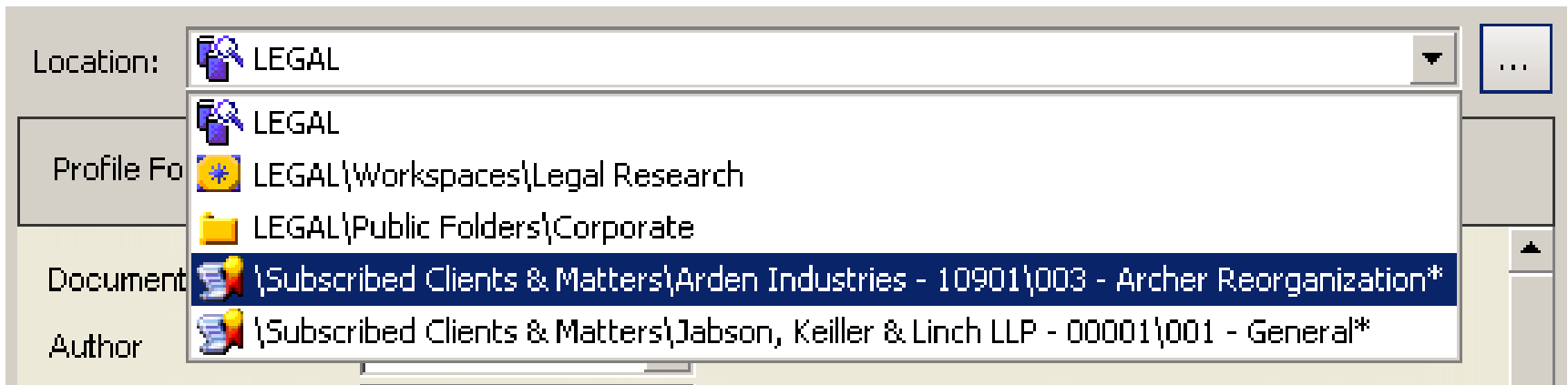
# Save User Interface Enhancements

- Users can now change the profile form of a document “on the fly”
- The form size is adjusted based on the size of the form or the last re-sizing the display of that specific form.



# Save User Interface Enhancements (cont.)

- The full path of the tree structure is displayed to easily differentiate folders of the same name but in different structures.



# Lowering Cost of Ownership

# Updated Platform Support



# Client Operating Systems



- Windows XP Professional
- Windows Vista 32 bit
- Windows 7 – 32 bit
- Windows 7 – 64 bit
  - The DM Extensions will be a 32 bit application running on the 64 bit platform

# Microsoft Office Suites

## Microsoft Office 2010

- Using Visual Studio Tools for Office (VSTO)
- Includes support for multiple file types
- 32 bit version

## Microsoft Office 2007

- Using COM
- Includes support for multiple file types

## Microsoft Office 2003

- COM Automation or ODMA support
- We will continue to support Office 2003, but QA will be limited for the release.
- This process is similar to the support policy that was described in the DM 5.2.1 CU4 platforms information document
- [Quick Reference: Applications and Platforms Supported in eDOCS DM/RM 5.2.1 CU4](#)



# Other Office Suites & Applications

- Lotus Suite 9.8, 9.7
- Corel WordPerfect Office X5, X3
- Adobe Acrobat 8.0, 9.0.x
- Dragon Naturally Speaking 10.1
- Freedom Scientific JAWS 11
- Lotus Notes 7.0.4, 8.5.2
- Novell GroupWise 7.0, 8.0
- ODMA for other third party applications

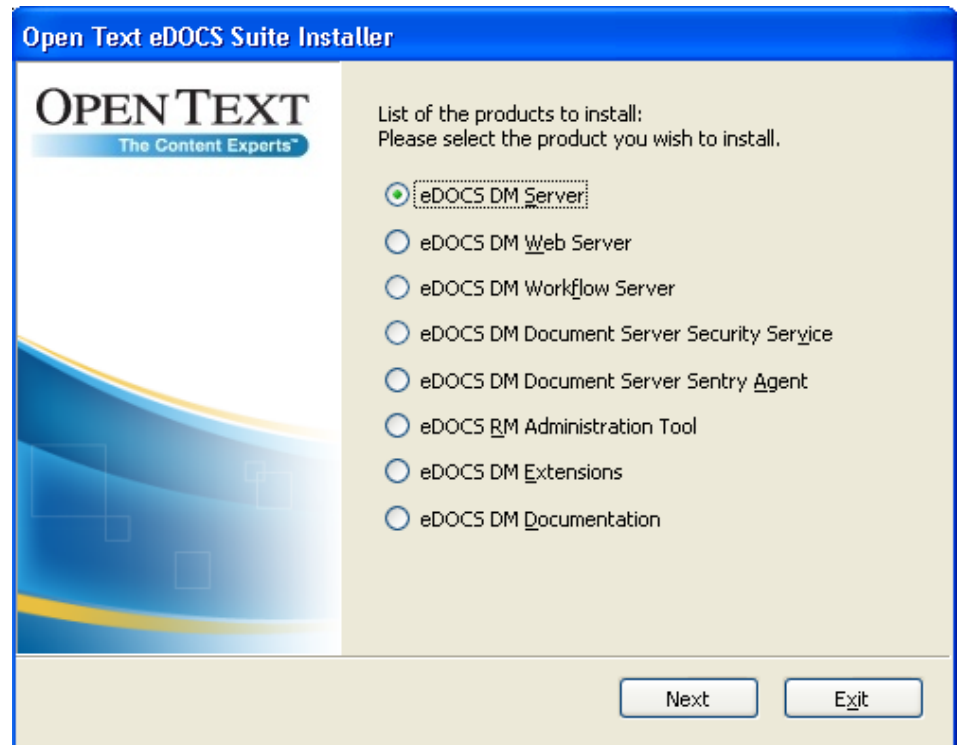
# Server Operating Systems / Databases

- Windows Server 2003 R2 (32 bit)
- Windows Server 2008, 2012 R2 (64 Bit)
  - The DM Server will be a 32 bit application running on the 64 bit server
- Microsoft SQL Server 2005, 2008, 2008, 2012 R2
  - Compatibility Mode or SQL-92 (Native Mode)
- Oracle 10g R2, 11g R2
- Citrix XenServer and XenDesktop
- Microsoft Windows Terminal Server
- Open Text will support customers who run DM products on supported operating systems, irrespective of whether they are running in a virtual environment or not.

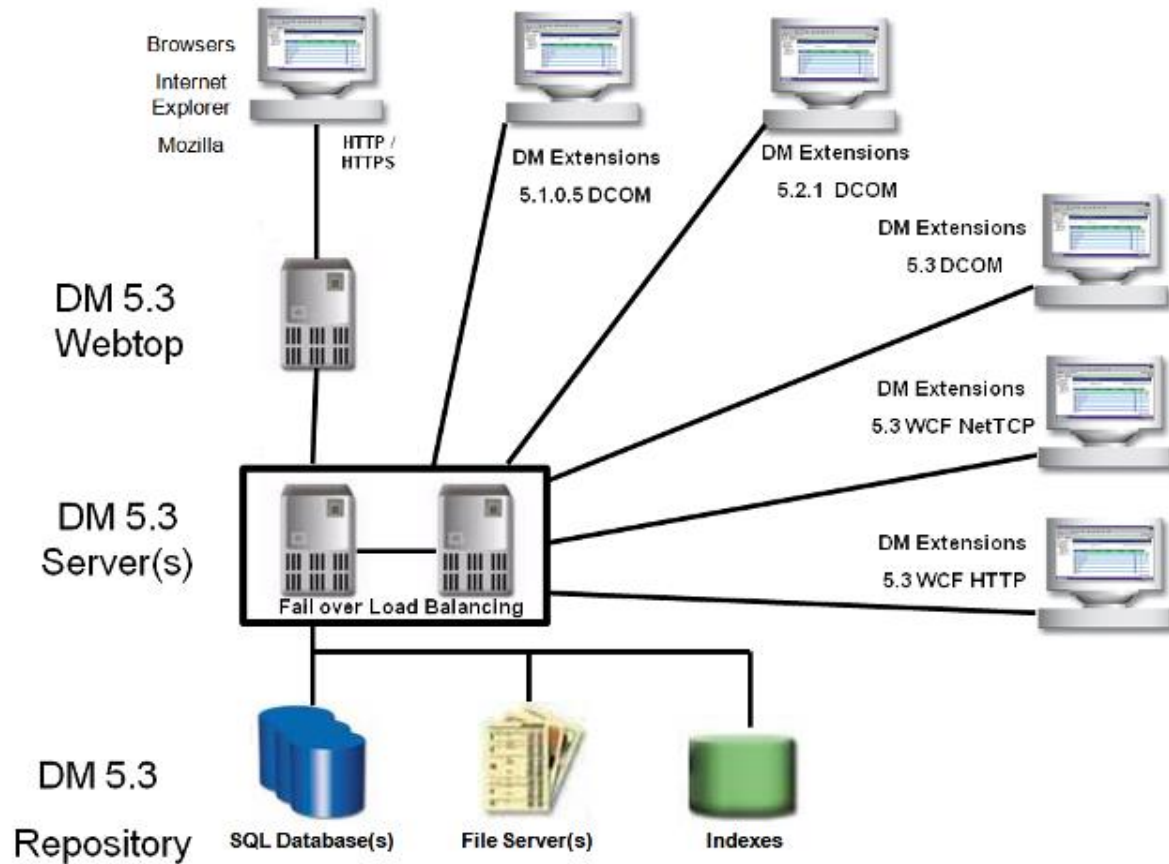
# Deployment Enhancements

# eDOCS DM 5.3 Packaging

- The eDOCS DM 5.3 software will be a new ISO image which includes all the MSI installation packages
- The eDOCS DM 5.3 software can be installed directly on a new Server or Desktop.
- The eDOCS DM 5.3 software will also upgrade an existing 5.1.0.5 / 5.2.1 Server or Extensions to DM 5.3

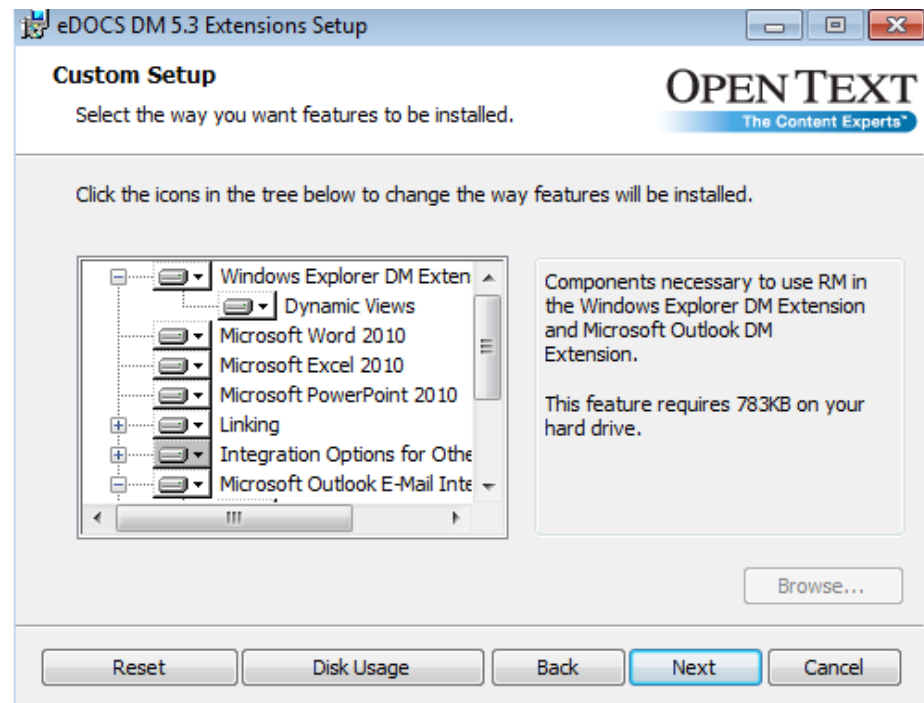


# eDOCS DM 5.3 Backwards Compatibility



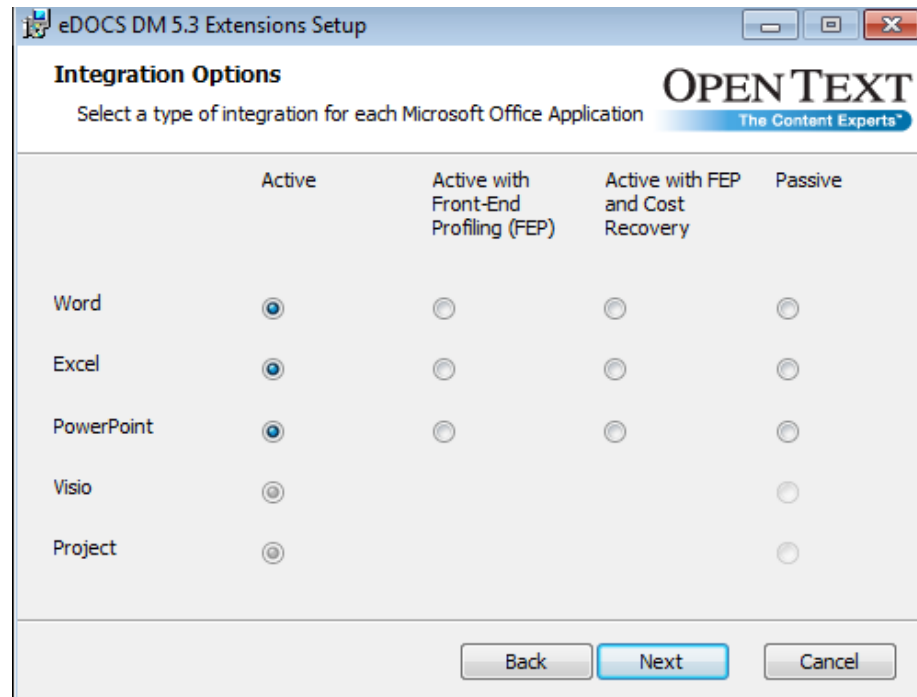
# Microsoft Windows Installer (MSI)

- The MSI software will detect the version of Office and install the respective integration macros
- Users will be able to select which features from the DM Extensions they would like to install



# Microsoft Office Integration

- If the user is performing the install then the option to select the type of Office integration will be presented



# MSI Installations Advantages

- Because all MSI installations are transactional, they have a built-in rollback feature for future patches
- MSI allows for either full installation of future patches or incremental
- MSI allows for installations to run from a group policy and can include additional hotfixes, registry, xml and macro files
- Reduced need to reboot after installation (Will inform user if processes are running during an update and ask to shut them down, a reboot will be required if they go ahead without shutting down the process)
- Completely customizable based on individual environments
- Use ORCA tool for modifying MSI Installations

[Windows Installer Development Tools](#)



# Architecture Enhancements

# Windows Communication Foundation

Update servers and clients to include support for

- Windows Communication Foundation (WCF)
- HTTP

Advantages to using WCF

- Tighter control of port usage
- Ability to use Microsoft's WCF logging utilities to diagnose connection problems

Servers will remain backwards compatible

- Using the eDOCS DM Client Connection Wizard, client machines can choose which connection to use
- Older clients can continue to use DCOM to connect to the eDOCS DM Server without interruption

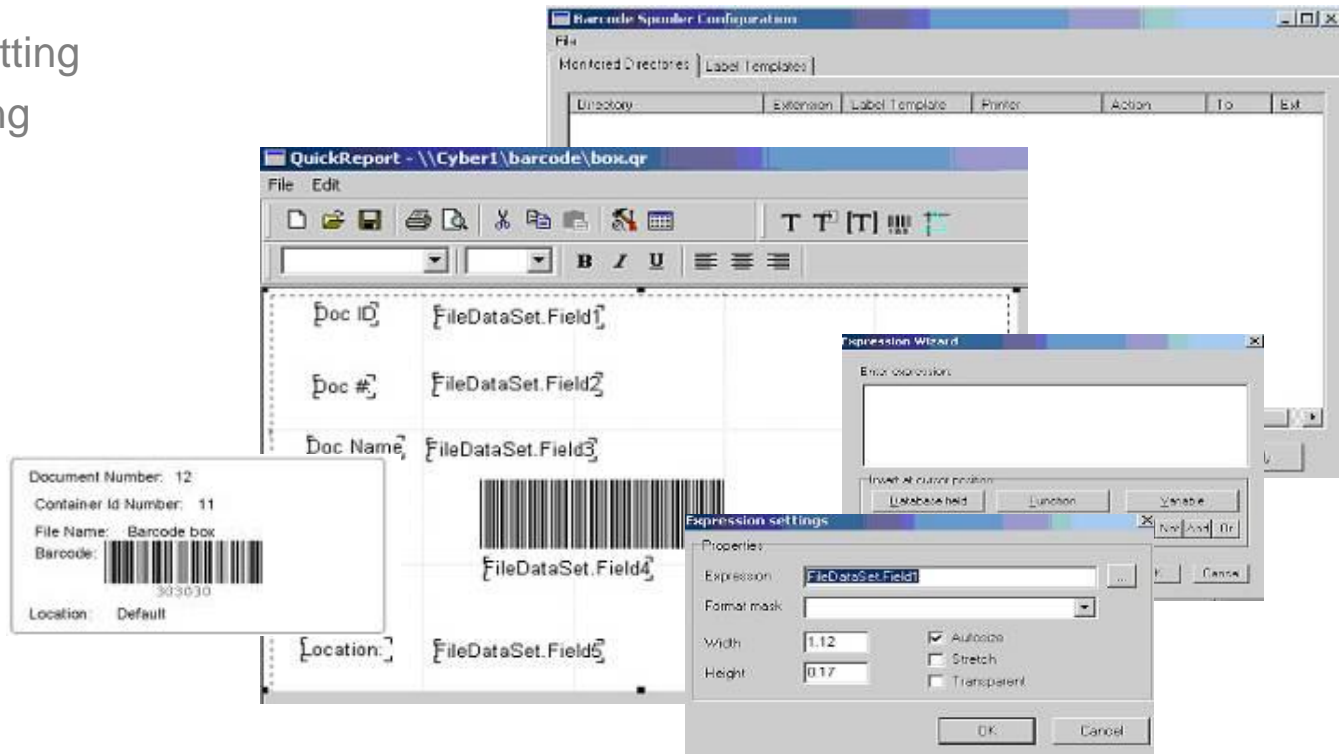
# eDOCS DM 5.3 Miscellaneous

# DM Miscellaneous Features

- New Search Operators:
  - “Plus” variable for date searches, %TODAY to %TODAY plus 30
  - Field is “EMPTY” or “NOT\_EMPTY”
- PowerPoint “Reuse Slide” integrated
- View native office document properties or DM Document properties separately
- Office File convert, changes a document from compatibility mode to native mode, Saves a .DOC to .DOCX as an example

# eDOCS RM 5.3

- eDOCS RM 5.2.1 functionality
- New RM Barcode Tool
  - Included with the RM Administrator Utility / License
- Provides
  - Label formatting
  - Label printing



Thank You