



DOCTRA Template Tools for OpenText Content Server

Summary

The OpenText Content Server offers a wealth of document management functionality that already goes beyond what can be expected from a modern ECM system. On top of that Doctra offers add-on packages which make working with the OpenText Content Server even more efficient and flexible.

These Add-Ons are developed and maintained by Doctra – driven by frequent customer requests.

Doctra Extensions for the OpenText Content Server provide you with pre-packaged solutions that are developed and tested by experienced Content Server specialists. The modules are available for different Content Server versions with language packs for German (DE) and English (EN).

The Add-Ons are offered as license packages including maintenance, making them future-proof and ready for upcoming OpenText Content Server versions.

DOCTRA Template Tools

OpenText Content Server provides a powerful tool for creating and managing templates with the built-in template mechanism. By using workspace templates the structure of workspaces can be uniformly defined and in addition the assignment of classifications and categories including attributes, can be used to build a document taxonomy. In addition, the assignment of authorizations can already be implemented uniformly via the template and the object life cycle can also be defined through assignment of Records Management -specific criteria.

As technical requirements change over time, the templates can be adapted accordingly. However, in the Content Server Standard, the template changes only have an effect on newly added objects that are based on the changed template. The already existing workspaces are not affected by the template changes and remain unchanged. The Content Server Standard does not provide an automatic rollout of template changes to the workspace inventory.

With the Template Tools module, Doctra now offers the possibility to roll out template changes into the existing workspace structure! This allows to quickly and easily standardize and update large workspace structures. Since the roll-out process for extensive structures can take some time, special attention was paid to the ability to restart the roll-out process. All changes to the structures are also recorded.

The Doctra Template Tools offer:

- available for binders and workspaces
- roll out template changes into existing structures
- add/rename/delete folders
- add Records Management-specific settings
- change of permissions
- inherit the column display to certain workspace subfolders
- inherit the attribute display order for binders
- logging of changes



Select a Template and the destination Folder (or Binder/Business Workspace) to apply permissions and columns.

Template for Binder or Business Workspace:	<input type="text"/>	<input type="button" value="Browse..."/>
Folder with Binder(s) or Business Workspace(s) / Binder(s) or Business Workspace(s):	<input type="text"/>	<input type="button" value="Browse..."/>
Apply Permissions:	<input type="checkbox"/>	
Replace all Permissions (instead of upgrading existing permissions and adding new users/groups only):	<input type="checkbox"/>	
Apply 1st level permissions to all sub items:	<input type="checkbox"/>	
Apply Columns:	<input type="checkbox"/>	
Apply Attribute Display Order:	<input type="checkbox"/>	
Apply template content (merge content if container exists):	<input type="checkbox"/>	
Apply template content only for Containers: <small>If there's no specified container be chosen, the merge happens in all containers of the Binder or Business Workspace</small>	<input checked="" type="checkbox"/>	
Apply new name of the container from template (if there was any renaming):	<input type="checkbox"/>	
Delete container(s), which is empty and also not existed in template:	<input type="checkbox"/>	
Apply Record Management (if there's no record management):	<input type="checkbox"/>	
<input type="button" value="Apply"/> <input type="button" value="Zurücksetzen"/> <input type="button" value="Abbrechen"/>		

Configuration of the Template Tools rollout mechanism

Doctra ECM Consulting

Doctra GmbH is a medium-sized service provider based in Munich, Frankfurt/M. and Vienna, offering solutions and services in the field of Enterprise Content Management for medium-sized and large companies. Thanks to many years of experience in a wide variety of projects, Doctra GmbH covers the entire spectrum from traditional consulting to implementation and operational support. The client's business is our top priority – its needs and goals come first. In the end, it is all about reaching one objective: an economical, profitable utilization of ECM technologies – to reach business objectives, not for the sake technology in itself.

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