



An Introduction to Fastman Bulk Data Manager

About Fastman

- An authorized OpenText Technology Partner
 - Technology Partner Finalist 2017
- 14 years in business
- Offices in North America, Australia, Asia, and Europe
- Focused OpenText Content Suite Partner
 - Products
 - Services

Some Current Customers



The Data Challenge

OpenText Content Suite is designed to process and manage large volumes of content



But provides limited tools to do this effectively

What Happens When You Want To ...

- Import or migrate documents and content
 - retaining creation date, modification date and assign owner
- Update related documents in sets or in bulk
- Add versions of many files at once
- Schedule automated processes after hours
- Apply smart data validation before processing, not during

Common IT Responses

- Pass problem back to users
 - Make changes one document at a time
- Pass problem to system administrators
 - Create and run scripts
 - Use Object Importer (needs scripting and data conversion)
- Use extract / import type tools
 - Simple approach, but...
 - Disconnected from business rules and system controls
 - Users require at least some technical knowledge
 - Generally requires user and administrator involvement

Common Management Responses

- Ignore the problem
 - It's just “noise”, no priority, etc....
- Blame the software
 - “Why doesn't it do this already?” / “Let's try something else”
- Separate process from data
 - Export, import data and/or metadata
- Separate data from controls
 - “What about compliance... and the audit trail...?”

Fastman Bulk Data Manager

Fastman Bulk Data Manager is the most flexible data migration and transformation solution for OpenText Content Suite and Extended ECM.

It simplifies volume updates of documents and metadata, optimizing your business processes and reducing administrative overheads.

Fastman Bulk Data Manager

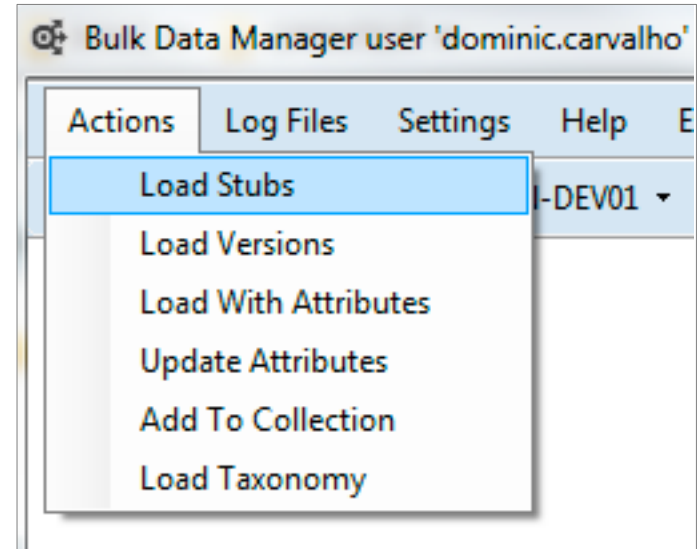
- Rich set of Content Suite administrative tools
- Allows authorized users to quickly create, load, update, and manage large sets of data
- Secures data through Content Suite enforced controls
- Centralised management of business data policies and process access
- Flexible framework that can quickly adapt to additional, unique requirements

Demonstration

What Does It Do?

Six core modules:

- load stubs
 - load versions
 - load with attributes
 - update attributes
 - add to collection
 - load taxonomy
- Licenced selectively, based on budget
 - Access centrally, controlled by policy
 - User configurable, based on need



Relevant Business Interface

Users see what they want, in the language they use

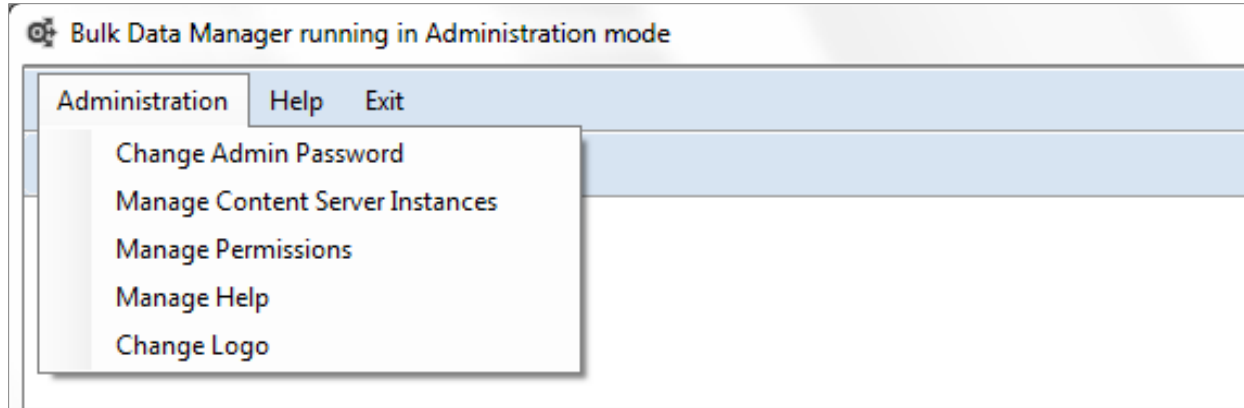
The screenshot shows the FastMan software interface. At the top, there is a menu bar with 'Actions', 'Log Files', 'Settings', 'Help', and 'Exit'. Below the menu bar, the 'Instance' is set to 'Instance on FASTMAN-DEV01' and the 'Profile' is 'Document'. The interface includes navigation buttons for 'Back', 'Next', 'Finish', and 'Close'. A search bar is present with the text: 'Enter document numbers separated by either New Line(enter), Comma(,) or Semi column(;): to search for in 'BL Testing' and subfolders'. The main area is divided into a file tree on the left and a search results table on the right. The file tree shows a hierarchy starting with 'LES Enterprise' and 'Recent Locations: Enterprise:Projects:Peru LNG:BL Testing'. The search results table has columns for 'Search', 'Category', 'Attribute', and 'Value'. A dropdown menu is open over the 'Document Type' row, showing options: 'Commercial', 'Drawing', 'General', and 'Technical'.

Search	Category	Attribute	Value
<input type="checkbox"/>	Document	Document Title	
<input type="checkbox"/>	Document	Revision	
<input type="checkbox"/>	Document	Revision Date	
<input checked="" type="checkbox"/>	Document	Document Scheme	Scheme02
<input checked="" type="checkbox"/>	Document	Document Type	Drawing
<input type="checkbox"/>	Document	Document Sub Type	Commercial
<input type="checkbox"/>	Document	Document Sub Type...	Drawing
<input type="checkbox"/>	Document	Document Sub Type...	General
<input type="checkbox"/>	Document	Document Status	Technical
<input type="checkbox"/>	Document	Percent Complete	
<input type="checkbox"/>	Document	Originator	

Using business terms and avoiding unfamiliar jargon

Controlling Access and Process

Simple, clear management and configuration



Central control for access and permissions

Controlling Access and Process

Local control for user and process specific settings

The screenshot displays a software configuration window with the following elements:

- Menu Bar:** Actions, Log Files, Settings, Help, Exit
- Instance/Profile:** Instance: EW2014AG, Profile: Document
- Buttons:** Save, Close
- Tabs:** General, Load Stubs, Load Versions, Load With Attributes, Update Attributes, Add To Collection, Load Taxonomy
- Fields:** Description Field: Created by BDM, Version File Remove Character: _
- Checkboxes:**
 - Use Parallel Processing for Imports
 - Use Created And Modified Date From File
- Allowed Categories:**
 - BDM_Category
 - BDM_Document_Control
 - Engineering Plan Status
 - File System Attributes
 - HR
 - Life Sciences Demo
- Attributes:** (Empty list)
- Allowed RM Classifications:**
 - Enable Records Management
 - Document Types
 - Engineering Lifecycle
 - Project
 - PROS 07/01 Classifications
- Mandatory:** Mandatory
- Attribute Default Value:** (Empty text field)

Integrated with RM / Physical Objects

Integrated with records management and respects all rules

The screenshot displays the Fastman software interface. At the top, there is a menu bar with 'Actions', 'Log Files', 'Settings', 'Help', and 'Exit'. Below the menu bar, the 'Instance' is set to 'Instance on cs162-demo-ag' and the 'Profile' is 'Document'. A toolbar contains various icons for file operations. The main window is divided into several sections:

- Search:** A text input field with the instruction: "Enter node names separated by either New Line(enter), Comma(,) or Semi colon(;). AND/OR select folder and attributes and click 'Search' button."
- Recent Locations:** A dropdown menu currently showing 'Enterprise: Bulk Data Manager Demo'.
- File Browser:** A tree view showing a list of folders: Bulk Data Manager Demo, Corporate Services, Customers, Fastman Products, Human Resources, Legal, Projects, Reports, Sales Orders, Utilities, and Z - pre-populated BDM Data.
- Select Classification Dialog:** A modal window titled 'Select Classification' with a 'Browse Classifications' section. It shows a tree view with 'Product Landing Page' selected and checked. Other categories include Configuration, Product Video, Document Types, Engineering Lifecycle, Project, PROS 07/01 Classifications, and Template Types.
- Categories and Classifications:** A section with a 'Categories' dropdown set to 'Classifications'. It includes a 'Classification' field with a dropdown arrow and a 'Sub items' checkbox.
- Records Management Attributes:** A table with the following structure:

RM Attribute	Value
RSI	
Record Date	
Record Type	
Status	
Status Date	
Received Date	
Essential	
Update Cycle Period	365...Daily
Last Review Date	
Next Review Date	

The status bar at the bottom left shows 'Status: Ready'.

Key Benefits - Business

- Reduces costs
 - business users can update and manage data in bulk
 - business users can create and load data directly
- Minimal user training
 - uses standard business terminology and processes
- Cost-effective licensing
 - only pay for the capabilities you need

Key Benefits - Technical

- Secure
 - centrally manage access to the product, each process, and each Content Suite environment
 - tightly coupled with Content Suite polices, controls and structure
- Works with Content Suite 9.7 to CS 21.n
 - no requirement for discontinued LAPI
- Maintains all normal Content Suite audit trails by user
 - including detailed logs of all processes

In Summary

- Bulk Data Manager is an all-in-one data migration and manipulation tool for OpenText Content Suite.
- It is effective in the context of recurring business processes as well as ad-hoc, legacy, or transformation migration activities.
- Bulk Data Manager is flexible, secure, managed, and proven.

CONTACT US

info@fastman.com

www.fastman.com

(NA) +1 949 955 4949

(AU) +61 3 9804 8251

(SG) +65 6396 4460

(NL) +31 6 4206 3775

