



# November 2020 Mini-Series

Episode 3: New Features and Advanced Functions  
of Fastman Permissions Manager

November 18<sup>th</sup> 2020

**Alister Grigg – Managing Director**

[alister.grigg@fastman.com](mailto:alister.grigg@fastman.com) / T: +1 310-721-2626

**Brian LaPointe – VP Sales, Americas**

[brian.lapointe@fastman.com](mailto:brian.lapointe@fastman.com) / T: +1 310-525-8802

**Weng Mong – VP, Sales APJ**

[weng.mong@fastman.com](mailto:weng.mong@fastman.com) / +61 478 136 188

# About Fastman

---

- An authorized OpenText Technology Partner
- 14+ years in business
- Offices in North America, Australia, Asia, and Europe
- Focused OpenText Content Suite Partner
  - Products target access and permissions, data management, and digital/electronic signatures


**opentext™** | Partner  
Technology Silver

**DocuSign®**  
Silver Partner



# Some Current Customers





*In today's world, data and information means power and value, and like anything of value, it must be protected.*

# Be Proactive with Information Security

---

- The practice of protecting information by mitigating information and data risks.
- Typically involves preventing or at least reducing the probability of unauthorized access, use, disclosure, deletion or corruption
- Is about process and control.
- Runs in parallel with its close cousin cyber security (which focusses on the network and prevention of infrastructure-based attacks).
- Reference: ISO 27000
  - “CIA” Triad - Confidentiality, Integrity, Availability





# The Issue

---

Content Suite / Extended ECM has very powerful access and security capabilities

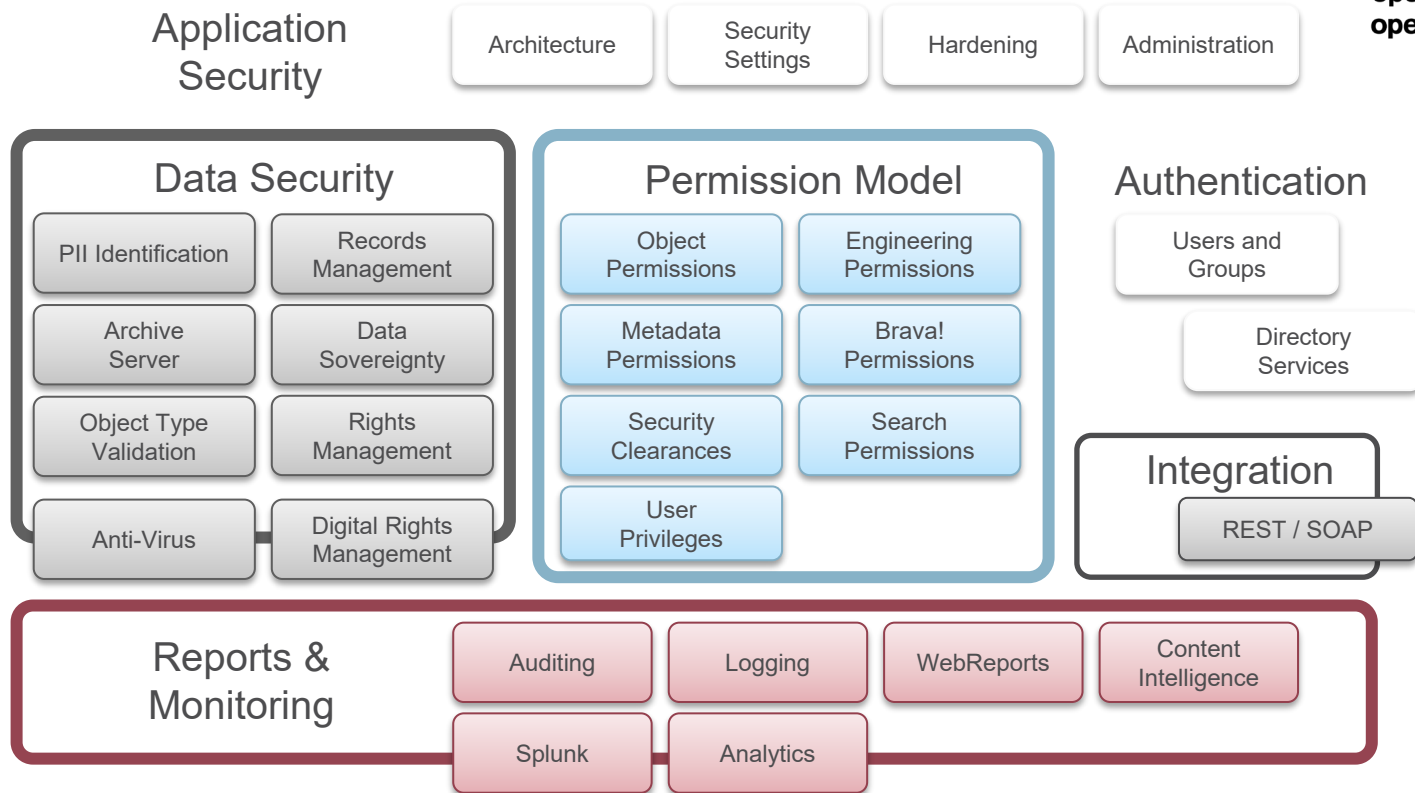


## ***But...***

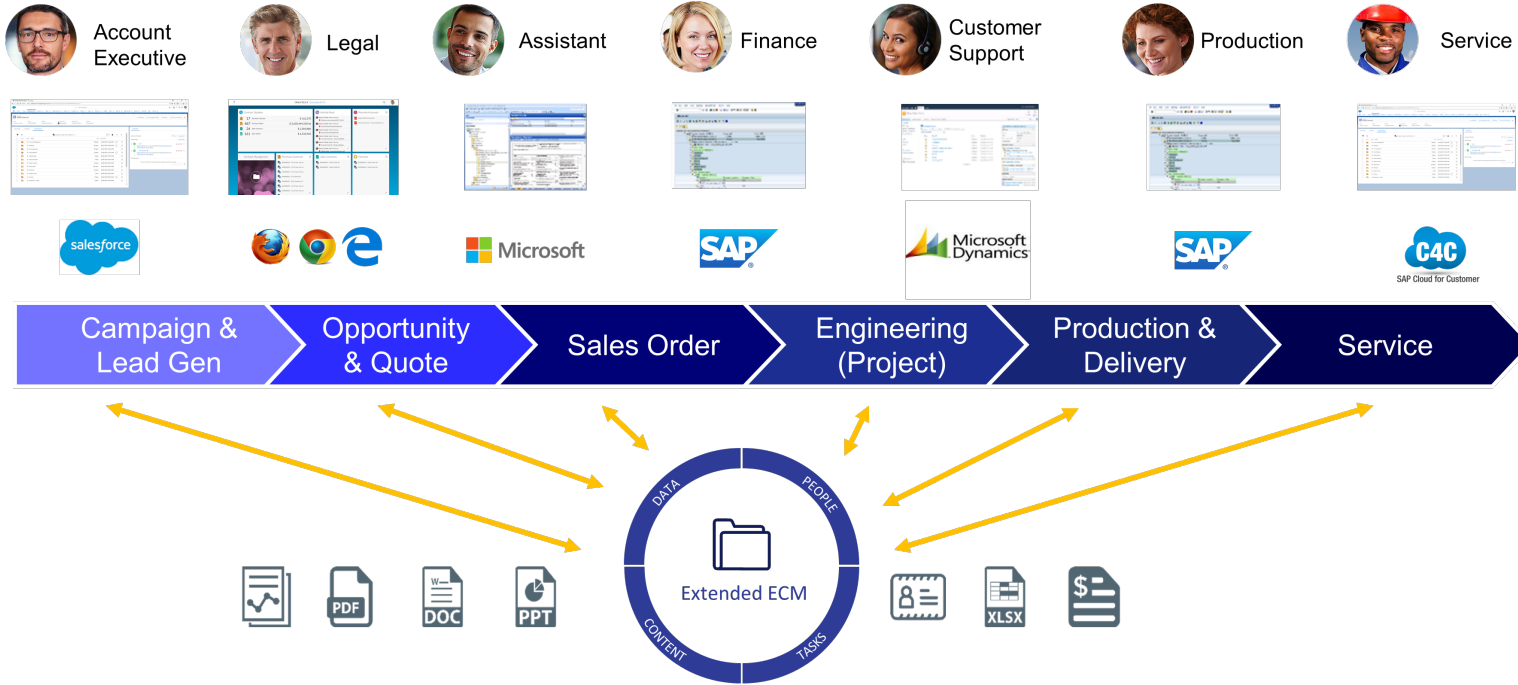
- ***It is not transparent***
- ***Costs of maintaining it can be high***
- ***Policy can be hard to enforce***
- ***Risk of non-compliance remains***

# Security and Permissions in OTCS is complex!

opentext™ | Content Suite  
opentext™ | Extended ECM



# And is becoming more complex!





# What Are Our Customers Asking For?

- Support for growing requirements around
  - Volume
  - System complexity
  - Records Management
  - Implementation and Support
  - Cloud certification



**PERMISSIONS MANAGER**

**Fastman**

The only solution for OpenText Content Suite and Extended ECM users that are serious about the security of their business content and information.

- ✓ Secure your Content Suite and Extended ECM information and content
- ✓ Bulk manage access controls across hierarchies and collections of content
- ✓ Quickly spot anomalies with comprehensive permissions dashboards
- ✓ Detailed permission audits and rollback for erroneous changes

OpenText Content Suite  
BUILT BY FASTMAN  
Permissions Management Experts

The advertisement features a background image of a hand holding a large padlock, symbolizing security. The text is presented in a clean, professional layout with a red box highlighting the key benefits and a circular seal emphasizing the product's origin.

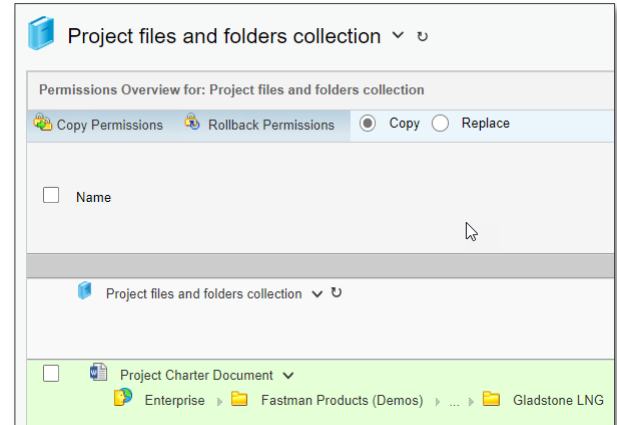
# New Features

---

- **Supporting large numbers of related items**
  - Customers are increasingly dealing with access control requirements across many hundreds of thousands of related items
  - Permissions Manager already supports collections
  - Now added support for these large volumes of content inside collections
- **Transport support for Permissions Templates**
  - Design, test, deploy across Dev/Test/Production
  - Synchronize to permissions design and deployment

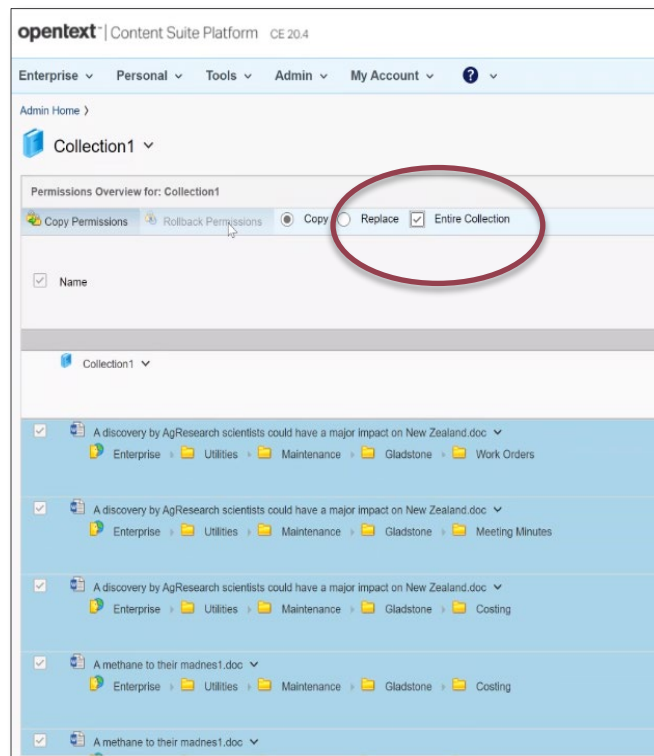
# Building on Existing Advanced Features

- Manage permissions across collections
  - Collect related content regardless of location
  - View, search, change, replace, edit permissions on one, many, or all items in a collection
  - Leverage standard Permissions Manager functions



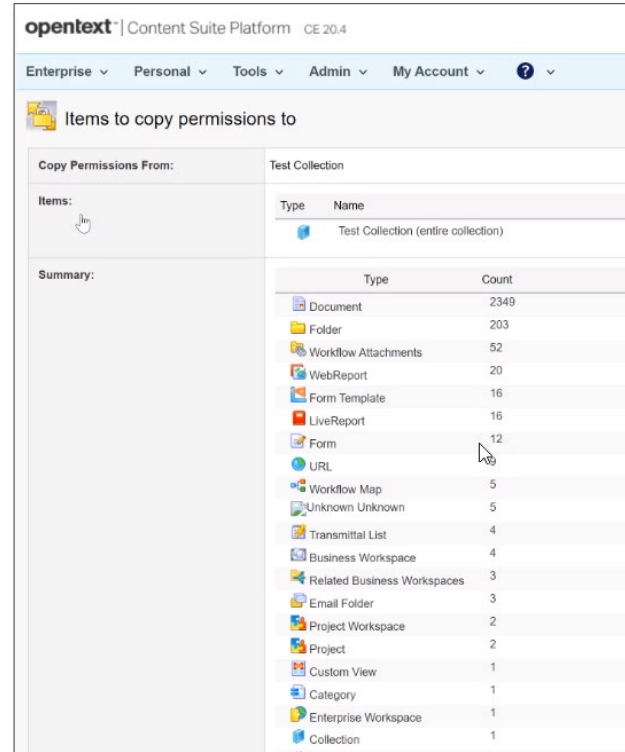
# New – Support for Large Collections

- New ‘Entire Collection’ button
  - Selects all items
  - Implies sub-items
  - Respects limits
  - Normal cascade options remain
  - Paginates



# Do You Really Want to???

- ‘Real’ count of items
  - vs. displayed count
- By type
  - Includes all types



The screenshot shows the OpenText Content Suite Platform interface. The top navigation bar includes 'Enterprise', 'Personal', 'Tools', 'Admin', and 'My Account'. The main content area is titled 'Items to copy permissions to' and shows a table of items. The table has columns for 'Type' and 'Count'. The items listed are:

Type	Count
Document	2349
Folder	203
Workflow Attachments	52
WebReport	20
Form Template	16
LiveReport	16
Form	12
URL	5
Workflow Map	5
Unknown Unknown	5
Transmittal List	4
Business Workspace	4
Related Business Workspaces	3
Email Folder	3
Project Workspace	2
Project	2
Custom View	1
Category	1
Enterprise Workspace	1
Collection	1

# Respects Admin Controls

- Allowed number of items
- Allowed Types
- Skipped Reasons

The size of this hierarchy is 3011. The maximum hierarchy size for permissions copy actions is 1000.

Cancel

Status

Error - Cannot copy permissions to target Item. Target permissions are not editable.

Done

Skipped Reason

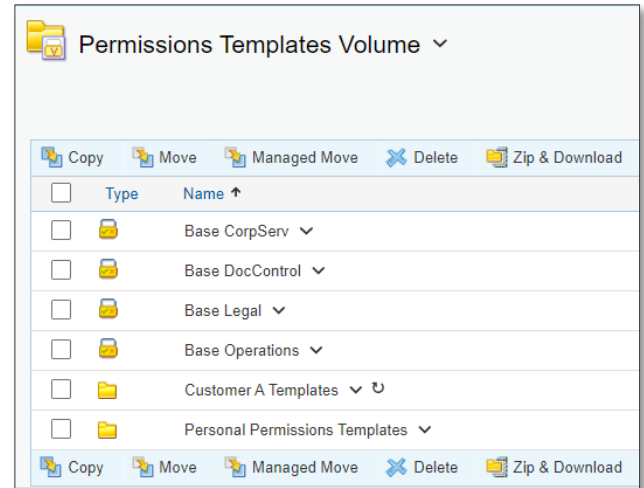
Skipped - The item is marked as Official or Confidential and cannot be updated.

Skipped - The item is marked as Official or Confidential and cannot be updated.



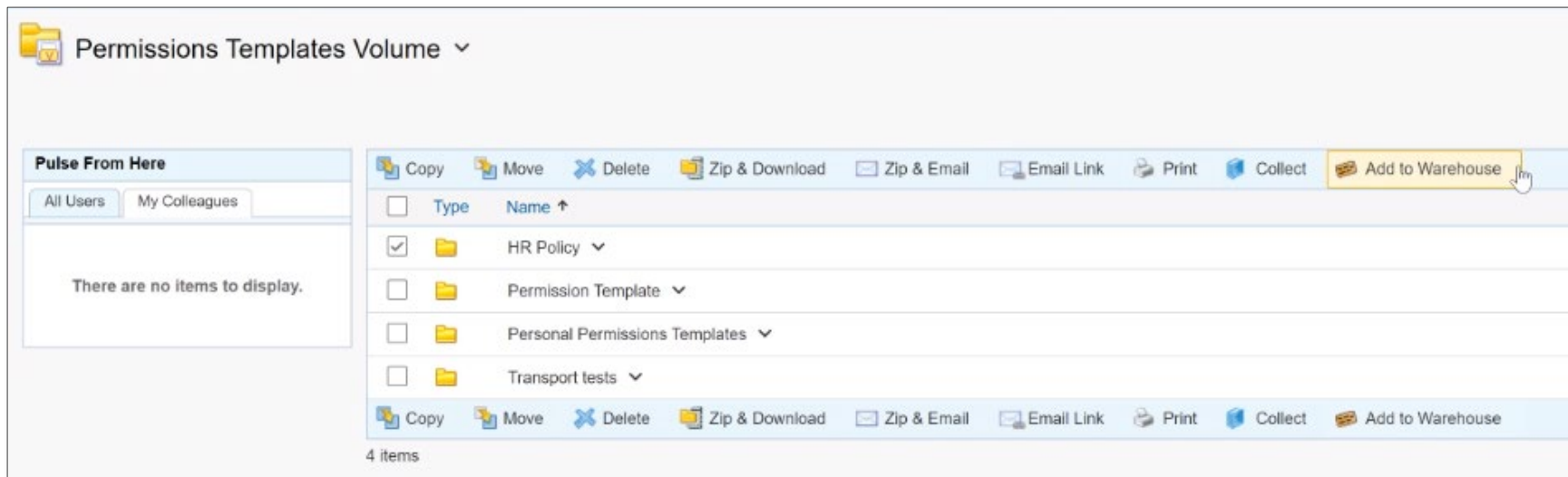
# Building on Existing Advanced Features

- Permissions Templates and Virtual Permissions
  - Work with ‘virtual’ permissions sets across all of Permissions Manager functions, including collections
  - Save and share saved Permissions Templates
    - Personally
    - Within teams
    - Across the organization



# New – Transport support for Templates

- Support Dev / Test / Prod lifecycle




The screenshot displays a file management interface for a volume named "Permissions Templates Volume". On the left, there is a "Pulse From Here" sidebar with tabs for "All Users" and "My Colleagues", and a message stating "There are no items to display." The main area shows a list of four items: "HR Policy", "Permission Template", "Personal Permissions Templates", and "Transport tests". Each item has a checkbox and a dropdown arrow. Above the list is a toolbar with various actions: Copy, Move, Delete, Zip & Download, Zip & Email, Email Link, Print, Collect, and Add to Warehouse. The "Add to Warehouse" button is highlighted in yellow. Below the list, another toolbar is visible, and the text "4 items" is shown at the bottom left of the main area.

<input type="checkbox"/>	Type	Name ↑
<input checked="" type="checkbox"/>	Folder	HR Policy ▾
<input type="checkbox"/>	Folder	Permission Template ▾
<input type="checkbox"/>	Folder	Personal Permissions Templates ▾
<input type="checkbox"/>	Folder	Transport tests ▾

# Validation

- Two levels
  - Template access itself
  - Access lists / permissions within the Template

Original object dependencies							
Type	Field	Original name/value	Current name/value	Exists in workbench	Exists in instance	Status	Actions
Assigned Access		HR Auditors			✗	Not found	<a href="#">Edit</a>
Permissions Manager Template - Assigned Access		HR Auditors			✗	Not found	<a href="#">Edit</a>
Permissions Manager Template - Group		DEMO-G-Human Resources	DEMO-G-Human Resources		✓	Deployable	<a href="#">Edit</a>
Permissions Manager Template - User		Ministrator, Admin	<input type="text"/> 		✗	Not found	<a href="#">Save</a> <a href="#">Cancel</a>
Owner		Admin	Admin		✓	Deployable	
Owner Group		DEMO-C-HUMANRESOURCES(HR)	DEMO-C-HUMANRESOURCES(HR)		✓	Deployable	<a href="#">Edit</a>
Parent		HR Policy		✓		Deployable	<a href="#">Edit</a>

# Validation

- Two levels
  - Template access itself
  - Access lists / permissions within the Template

Original object dependencies							
Type	Field	Original name/value	Current name/value	Exists in workbench	Exists in instance	Status	Actions
Assigned Access		HR Auditors	HR Auditors		✓	Deployable	<a href="#">Edit</a>
Permissions Manager Template - Assigned Access		HR Auditors	HR Auditors		✓	Deployable	<a href="#">Edit</a>
Permissions Manager Template - Group		DEMO-G-Human Resources	DEMO-G-Human Resources		✓	Deployable	<a href="#">Edit</a>
Permissions Manager Template - User		Ministrator, Admin	Admin		✓	Deployable	<a href="#">Edit</a>
Owner		Admin	Admin		✓	Deployable	
Owner Group		DEMO-C-HUMANRESOURCES(HR)	DEMO-C-HUMANRESOURCES(HR)		✓	Deployable	<a href="#">Edit</a>
Parent		HR Policy		✓		Dependency must be deployed first	<a href="#">Edit</a>

# Summary

---

- Collections now supports large numbers
  - Normal admin controls apply
  - Highly relevant to Business Workspaces / Extended ECM but also to classic OTCS systems
- Permissions Templates now 'transportable'
- Included under maintenance in next release of Permissions Manager
  - Certified for OTCS and Extended ECM 20.n
  - 'Should be' compatible with earlier versions (no issues reported)

# Which Takes us Back to..

To ensure information is secure, users are not disenfranchised, and costs are contained

Name	User or Group	See	See Comments	Modify	Edit Attributes	Add Items	Remove	Add Major Version	Delete Version	Delete	Edit Perm.	Security	Suppression
Secured Items	Admin FirstName Admin Lastname	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	<No Owner Group>												
	Public Access	✓	✓										
	Fastman Staff (Delete) 259219	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Sam Crocker	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
All Staff Letter	Admin FirstName Admin Lastname	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓
	DefaultGroup (24)	✓	✓	✓									
	Public Access	✓	✓										
	Fastman Staff (Delete) 259219	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓
	Sam Crocker	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
European Privacy Data	Admin FirstName Admin Lastname	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	90 EURO*
	DefaultGroup (24)	✓	✓	✓									
	Public Access	✓	✓										
	Fastman Staff (Delete) 259219	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	
	Sam Crocker	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Financial Records 2019	Admin FirstName Admin Lastname	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	50
	DefaultGroup (24)	✓	✓	✓									
	Public Access	✓	✓										
	Fastman Staff (Delete) 259219	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	
	Sam Crocker	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Merger and Acquisition Memorandum	Admin FirstName Admin Lastname	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	1

*You need a comprehensive and proven tool built for purpose*



# The Bottom Line

---

Fastman Permissions Manager remains the leading product to meet the Access and Permissions challenge for OpenText Content Server and Extended ECM



***Increases its effectiveness as a risk and compliance platform***

***Increases ROI, lowers deployment and support costs***

## CONTACT US

---

[info@fastman.com](mailto:info@fastman.com)

---

[www.fastman.com](http://www.fastman.com)

---

(NA) +1 949 955 4949

(AU) +61 3 9804 8251

(SG) +65 6396 4460

(NL) +31 6 4206 3775

