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What's new in Exstream 16.3

OpenText Customer Communications Management

October 2017

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Exstream 16 structuring & concepts

Exstream 16 can be conceptualized through three main components:

- **Platform**
  - Base platform for batch and on-demand use cases
  - Includes Exstream Design & Production
  - Includes Communications Server (StreamServe & PowerDocs base technology)
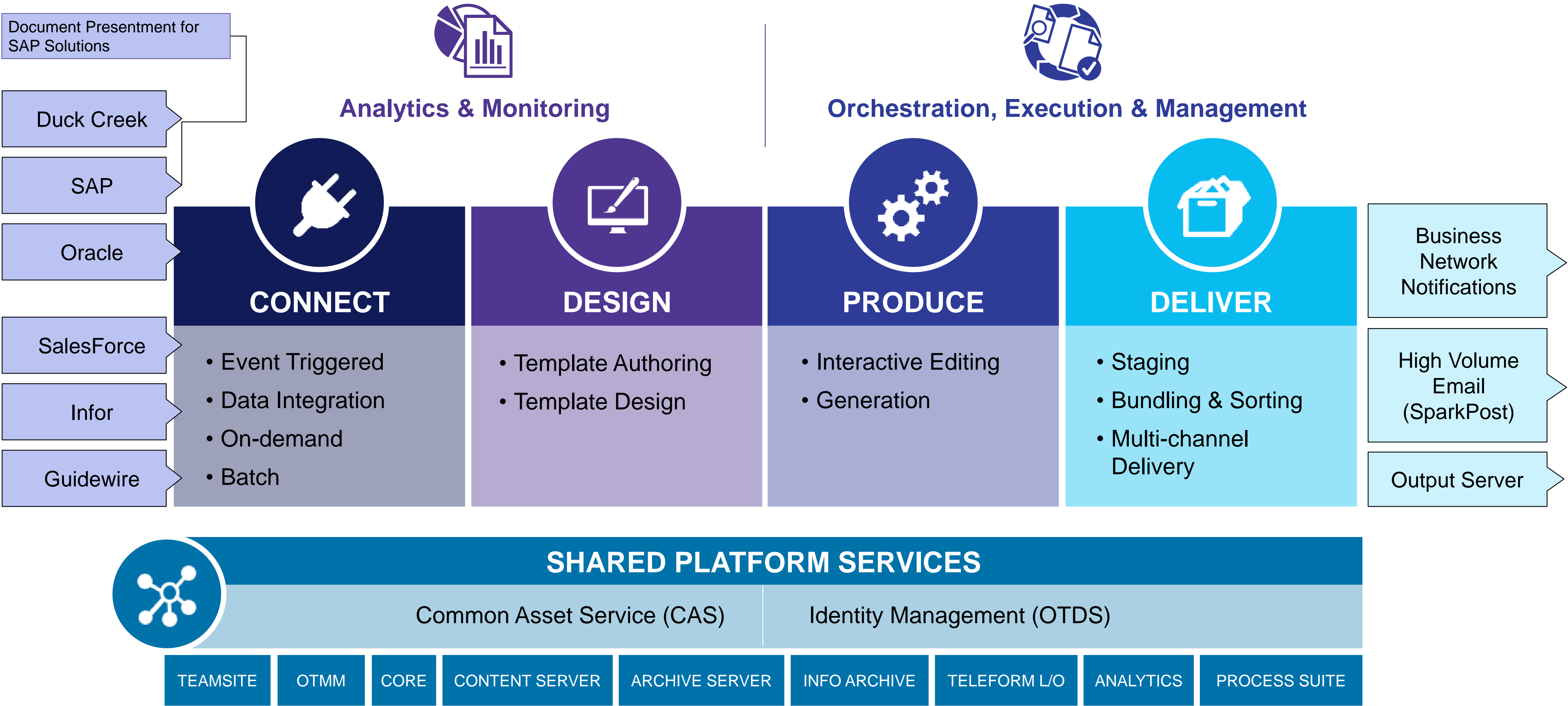
- **Interactive**
  - Interactive editing of 1:1 communications
  - Empower, ReTouch & PowerDocs Editor

- **Business Authoring**
  - Line of Business user targeted template changes and content control
  - Exstream Content Authoring (New!)
  - StoryBoard (for StoryTeller designs)
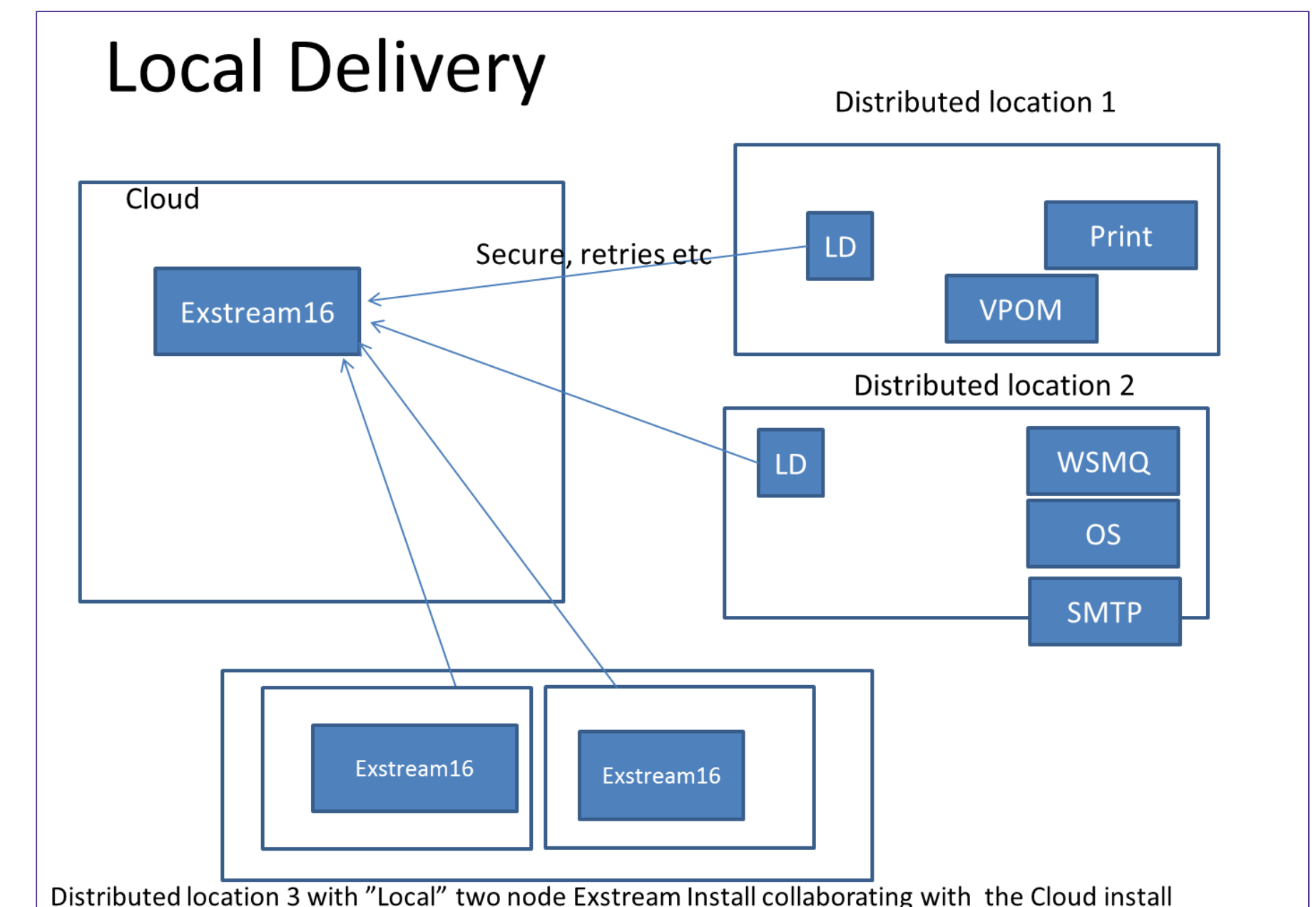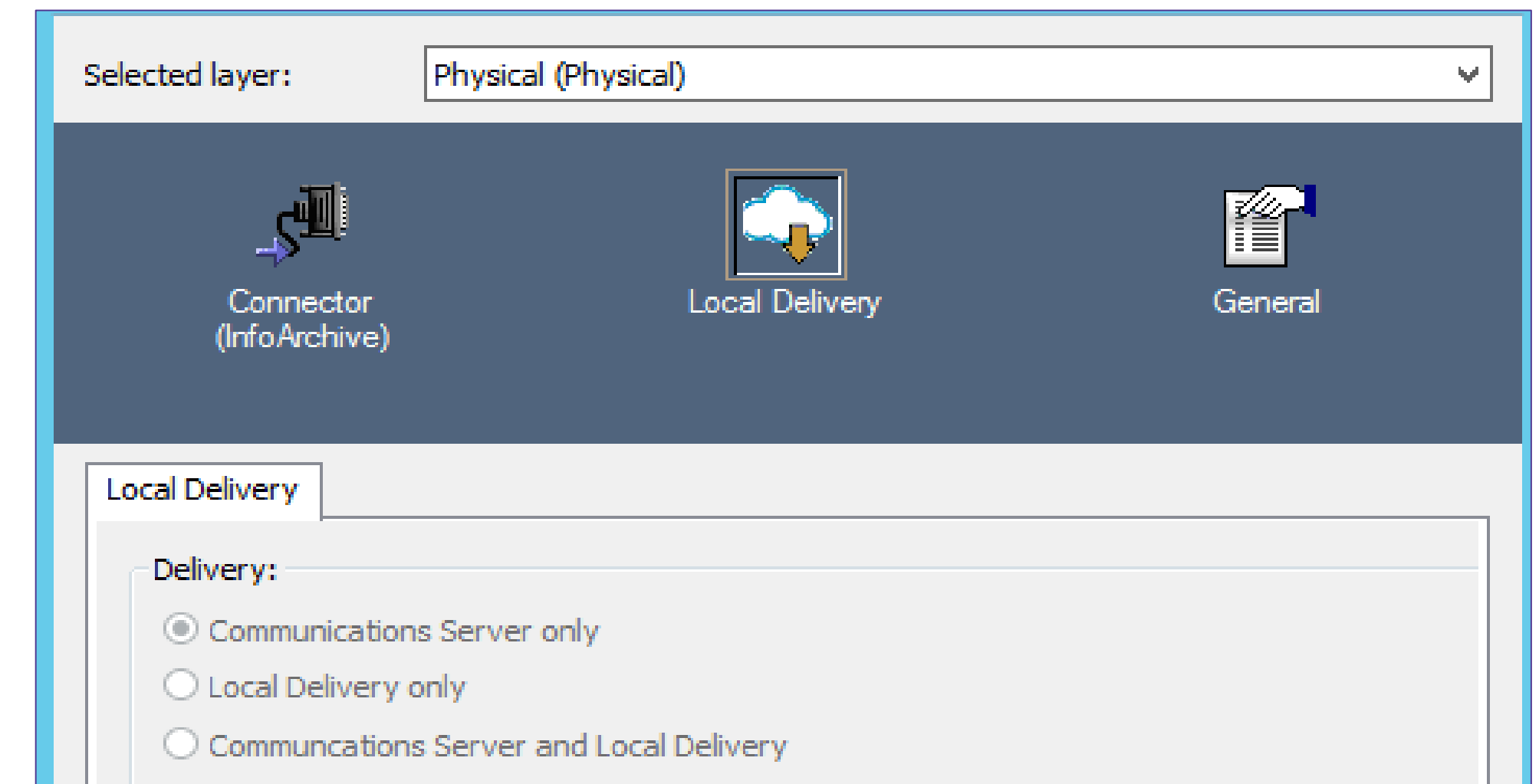 - PowerDocs Design (MS Word based)

Exstream 16 Platform

Analytics & Monitoring

Orchestration, Execution & Management

Document Presentment for SAP Solutions

Duck Creek

SAP

Oracle

SalesForce

Infor

Guidewire

CONNECT
- Event Triggered
- Data Integration
- On-demand
- Batch

DESIGN
- Template Authoring
- Template Design

PRODUCE
- Interactive Editing
- Generation

DELIVER
- Staging
- Bundling & Sorting
- Multi-channel Delivery

Business Network Notifications

High Volume Email (SparkPost)

Output Server

SHARED PLATFORM SERVICES

Common Asset Service (CAS)

Identity Management (OTDS)

| TEAMSITE | OTMM | CORE | CONTENT SERVER | ARCHIVE SERVER | INFO ARCHIVE | TELEFORM L/O | ANALYTICS | PROCESS SUITE |

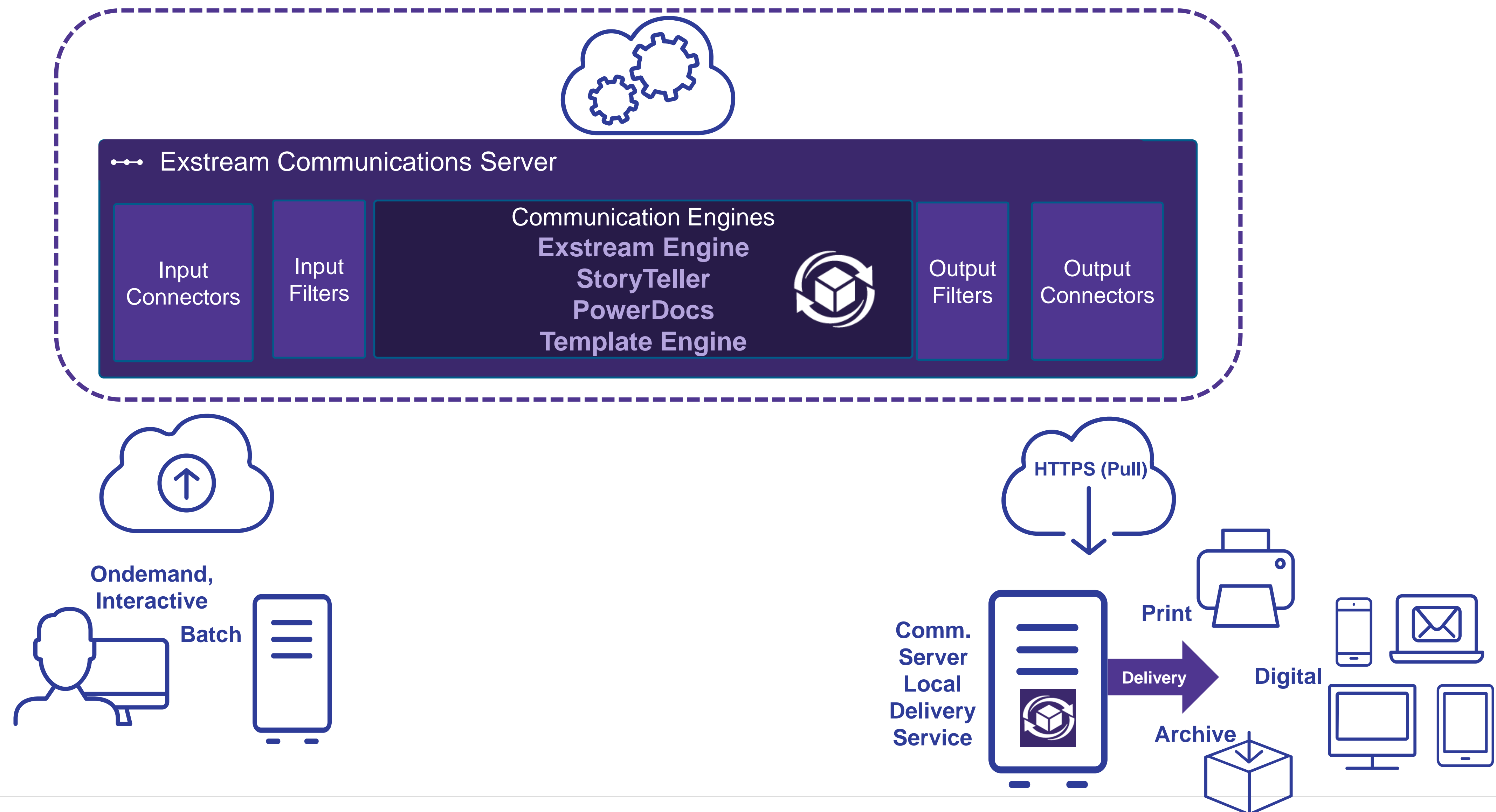**opentext**™

Exstream Platform

Communications Server

New Local Delivery Service

- A scaled-down version of Communications Server, consisting of essentially input connector and output connector processing only
- Provides the ability to deliver output across network boundaries, for example from the cloud to on-premise for printing, email delivery, and archival.
- Leverages native Communications Server functionality to 'pull' output from a remote location to a local or on-premise server.

Local Delivery

Distributed location 3 with "Local" two node Exstream Install collaborating with the Cloud install

New Local Delivery Service

Exstream Communications Server

| Input Connectors | Input Filters | Communication Engines **Exstream Engine** **StoryTeller** **PowerDocs** **Template Engine** | Output Filters | Output Connectors |

Ondemand, Interactive

Batch

HTTPS (Pull)

Comm. Server Local Delivery Service

Print

Delivery

Digital

Archive

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New OpenText Output Server Output Connector

- New 'Output Server' output connector option in Communication Server delivers composed output directly to a logical destination in Output Server

- Output Server settings can be set using variables & static data from Exstream
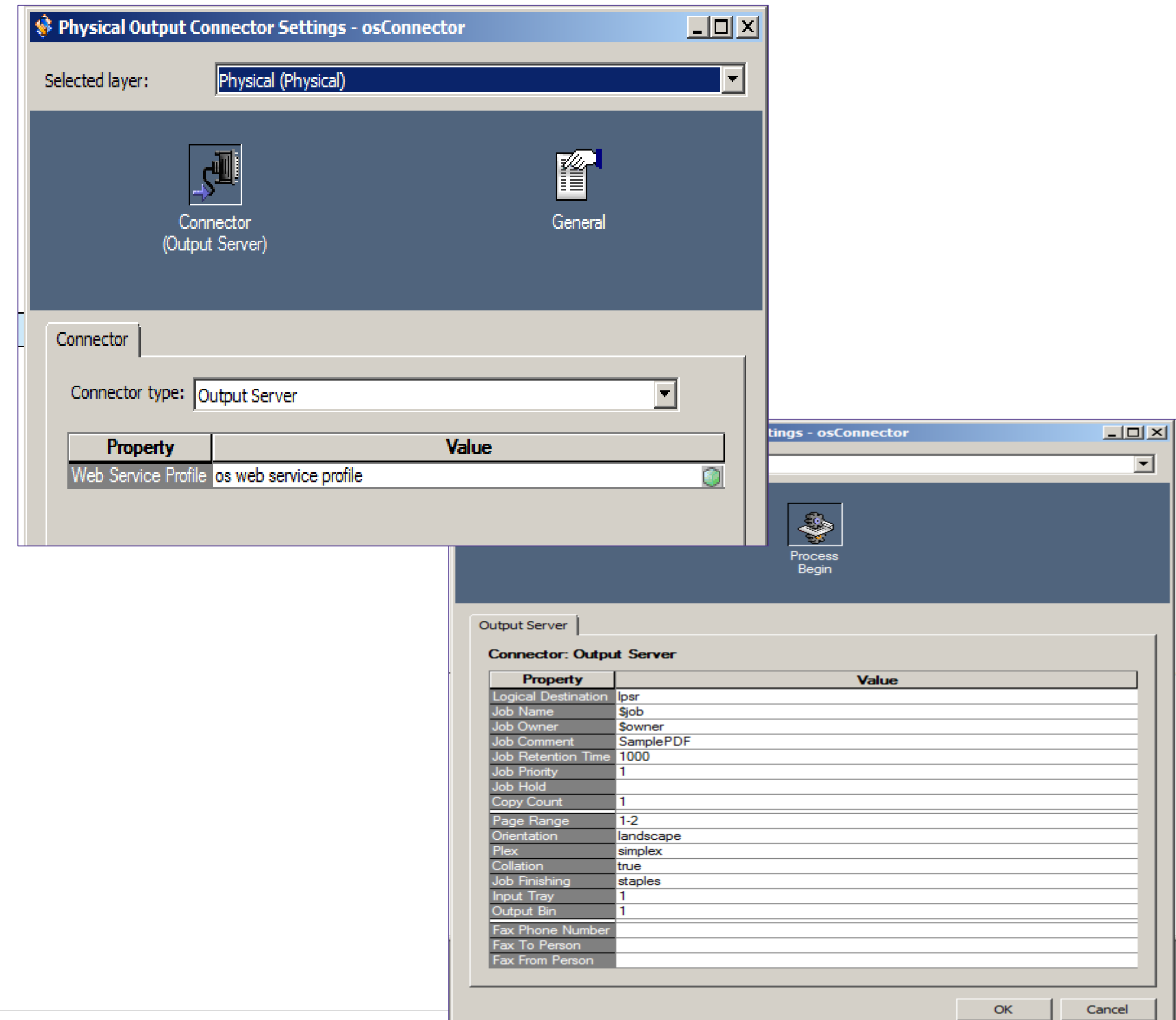
New InfoArchive Output Connector

- New 'InfoArchive' output connector option in Communications Server allows customers to connect and distribute output directly to OpenText InfoArchive
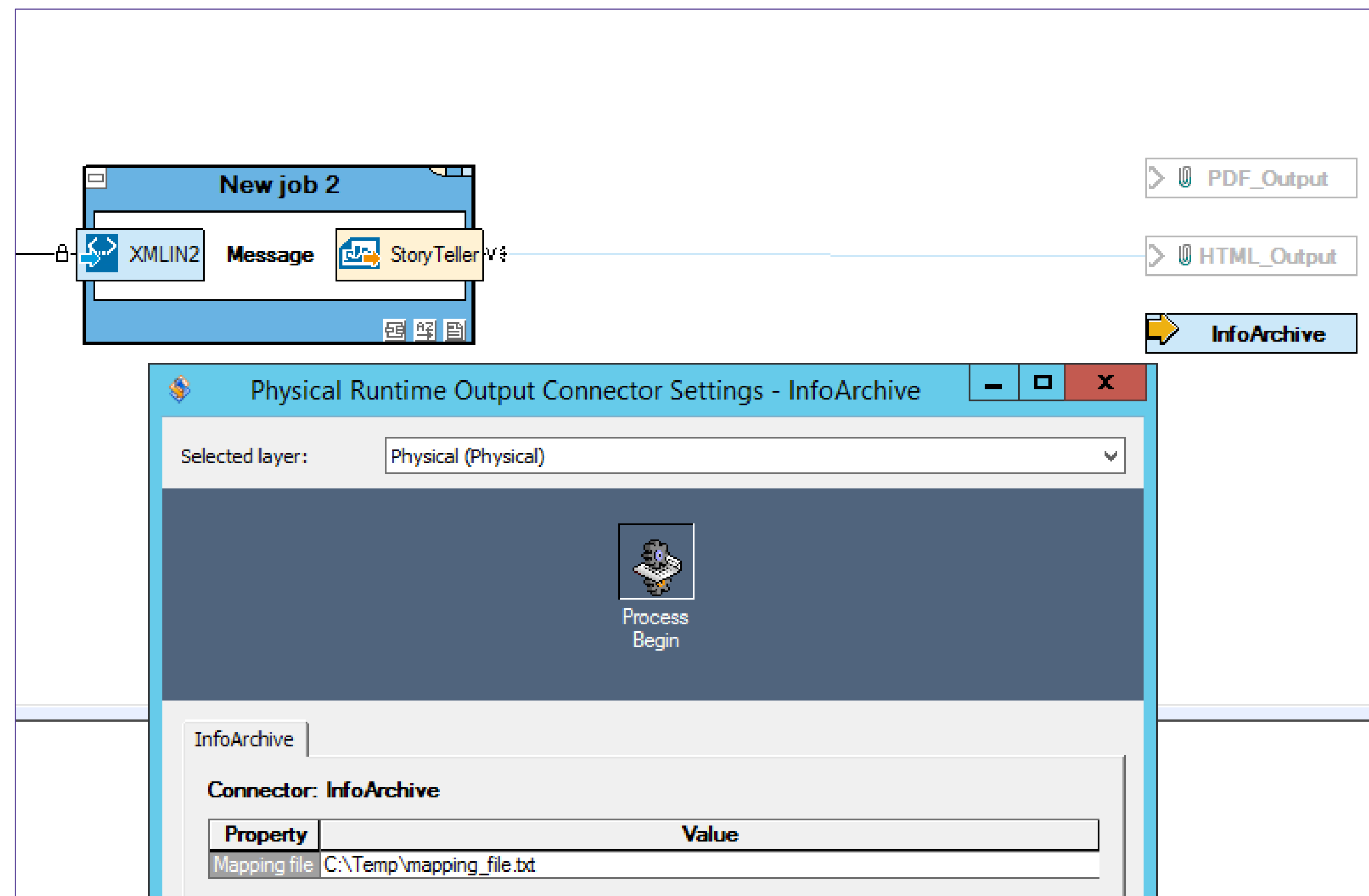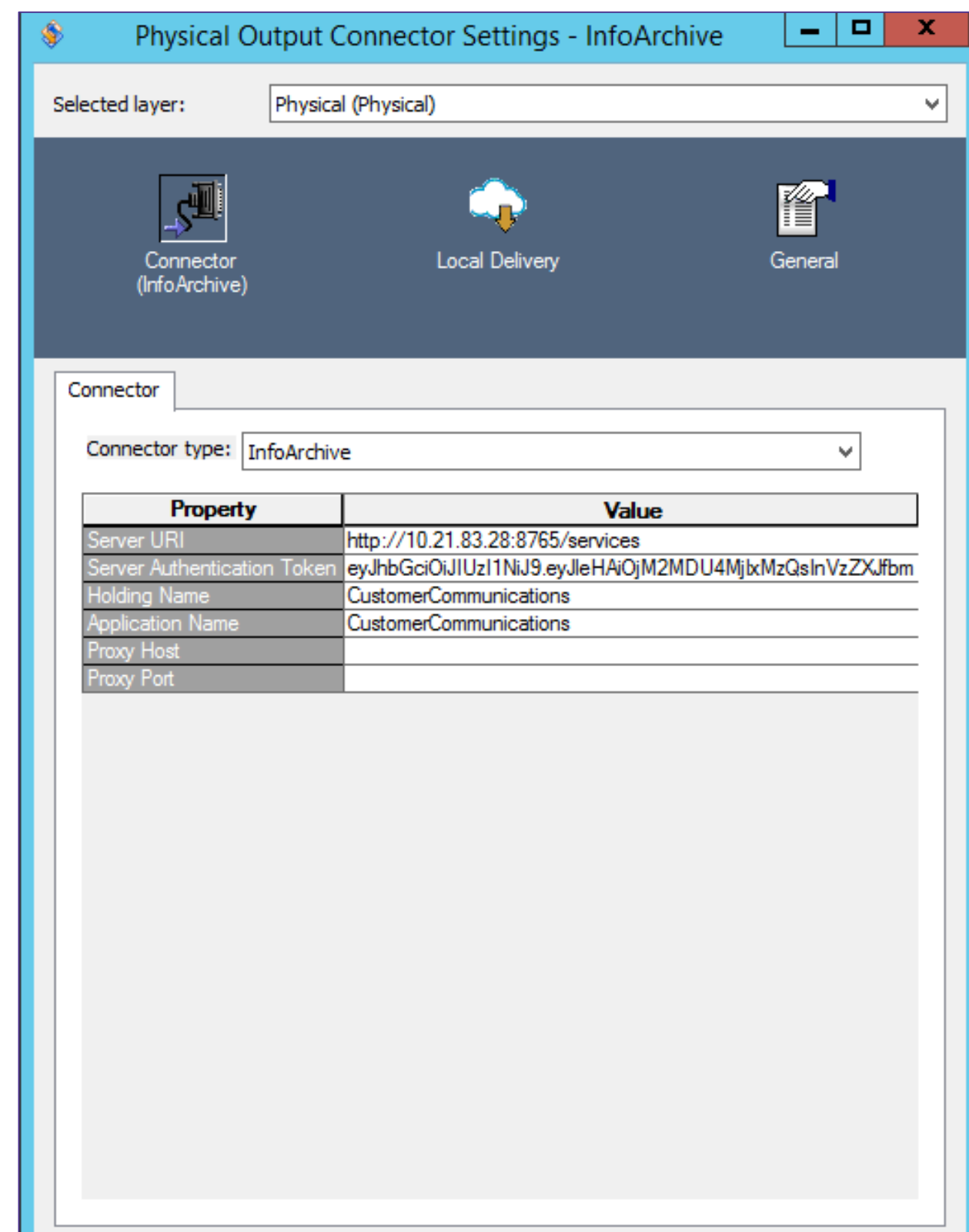
Domain isolation, approval management, access control

- Bring changes from Development to Production with a few clicks

- Role-based access control allows to segment 'reviewers', from other users and admins

- Benefits
  - Business and line of business users can manage content lifecycle
  - With preserved enterprise grade security, control and flexibility
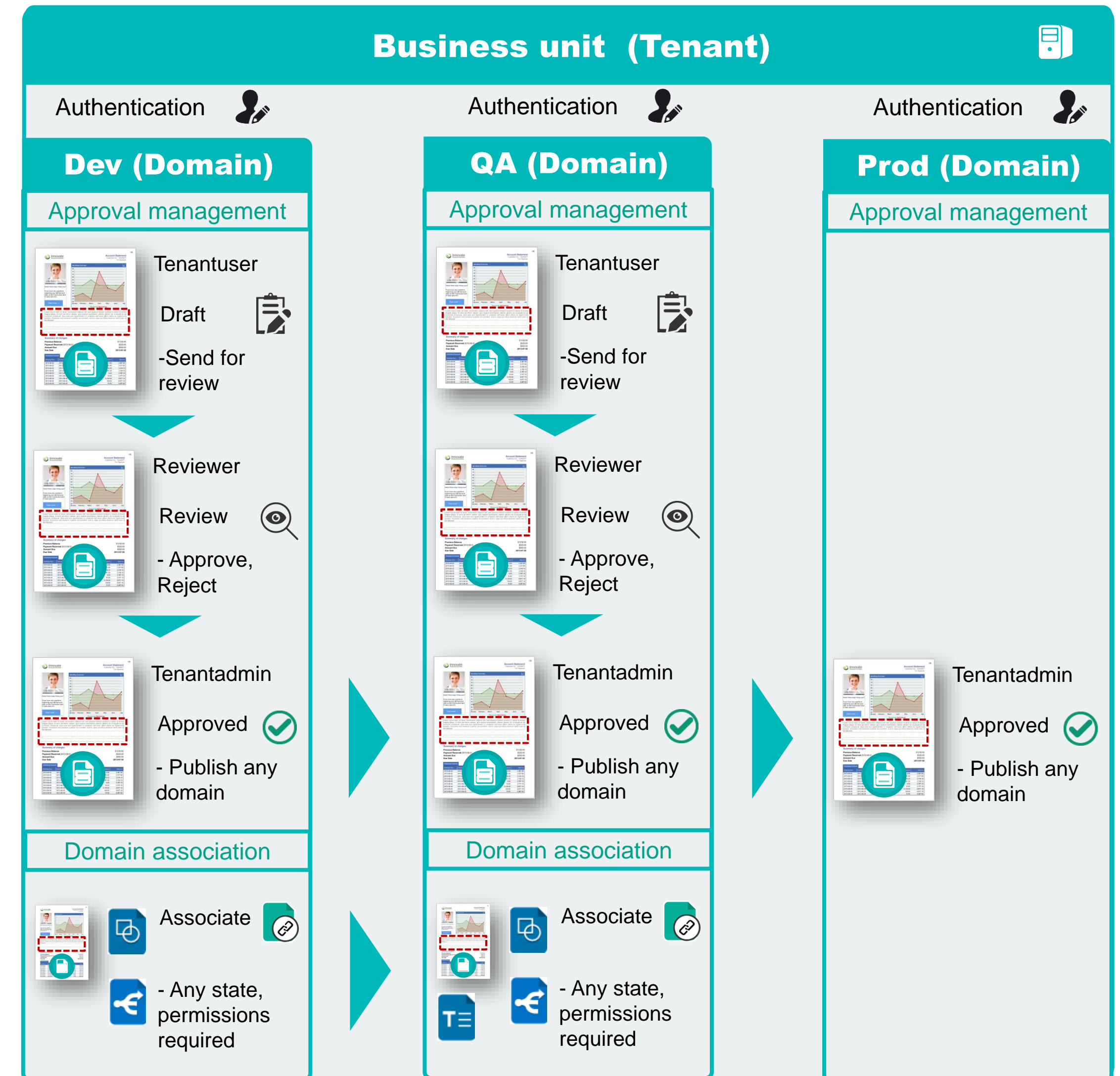
Exstream On demand Engine support in Communication Server

- A new 'Enable engine on demand' check box on the processing engine dialog in Communications Server improves performance
- NodeJS wrapper around a new ProdEngine dll allows the Exstream Engine to run in ondemand (real-time) mode
- Engine does not shutdown between Exstream jobs
- Requires **Exstream Engine 16.3** or higher

Advanced scripting and metadata in Communication Server

Advanced scripting

- Developers can add scripting to input files, output connectors, outputs, and processing engines with timing options.

- Foundational enhancement for more advanced, workflow-based orchestration in future releases.

- Enables use cases related to assured delivery and event notification handling

Advanced metadata

- Developers can assign custom attributes (metadata) to output generated by processing engines orchestrated by Communications Server and that can be used by archival tools to index and retrieve documents, or in job reporting tools like Supervisor to report on custom metadata objects to gather intelligence about Exstream processing events.

Standardized APIs

- Exstream 16.x platform offers REST-based APIs, enabling a wide variety of integration activities.
- APIs are Swagger documented, making it easy for back end implementation and client side consumption.
- The Swagger UI can be accessed via https://<hostname>:<ServiceGatewayPort>/api/index.html
    - Example: https://10.21.86.148:2719//api/index.html
- OpenText Exstream API Developer guide available https://developer.opentext.com/
    - Search for "Exstream"
- Note: all API-based communication requires a valid OpenText Directory Service (OTDS) ticket.
- Example new 16.3 API capabilities include:
    - Application & Application Domain APIs
    - Links & Views APIs
    - API for list of templates
    - Addition APIs for document and theme

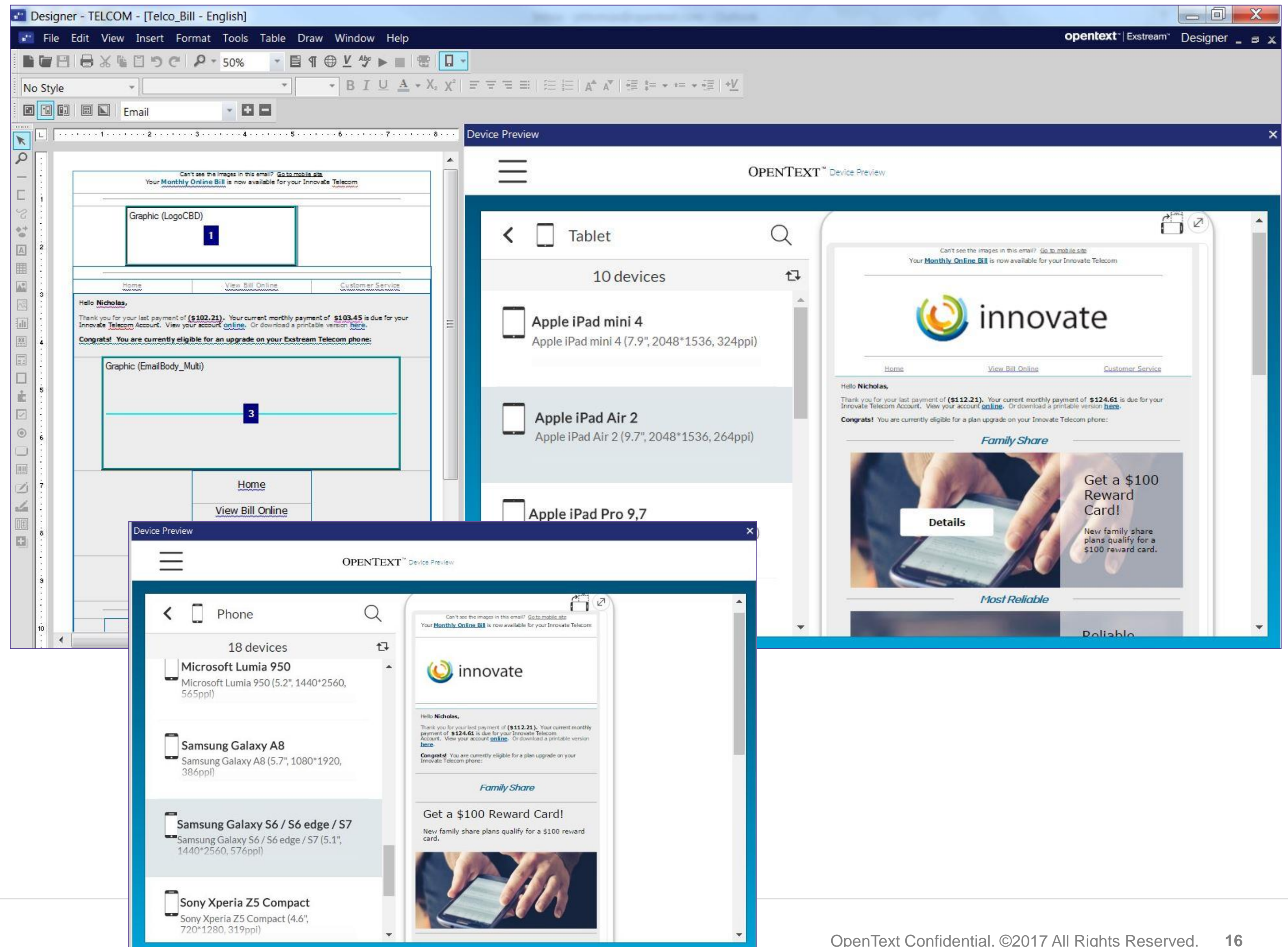# Swagger UI for Exstream API

Exstream Platform

Design & Production

Device Preview for Exstream Designer

Quickly preview how content will appear on any device

- Available starting with 16.2 Update 1

- Preview communication designs for any mobile or tablet device

- Optimize your design to work across a variety of devices

JSON data file support

- The Exstream Engine now natively reads and writes JSON-formatted data
- JSON data can be used as input to drive composition and populate variables
  - Input data files types are driver, reference, initialization and auxiliary layout
- JSON can be used to generate report files which can be used with external systems/processes
- JSON formatted data can also be used with Exstream Engine RESTful web service calls
- Licensed as part of the XML module
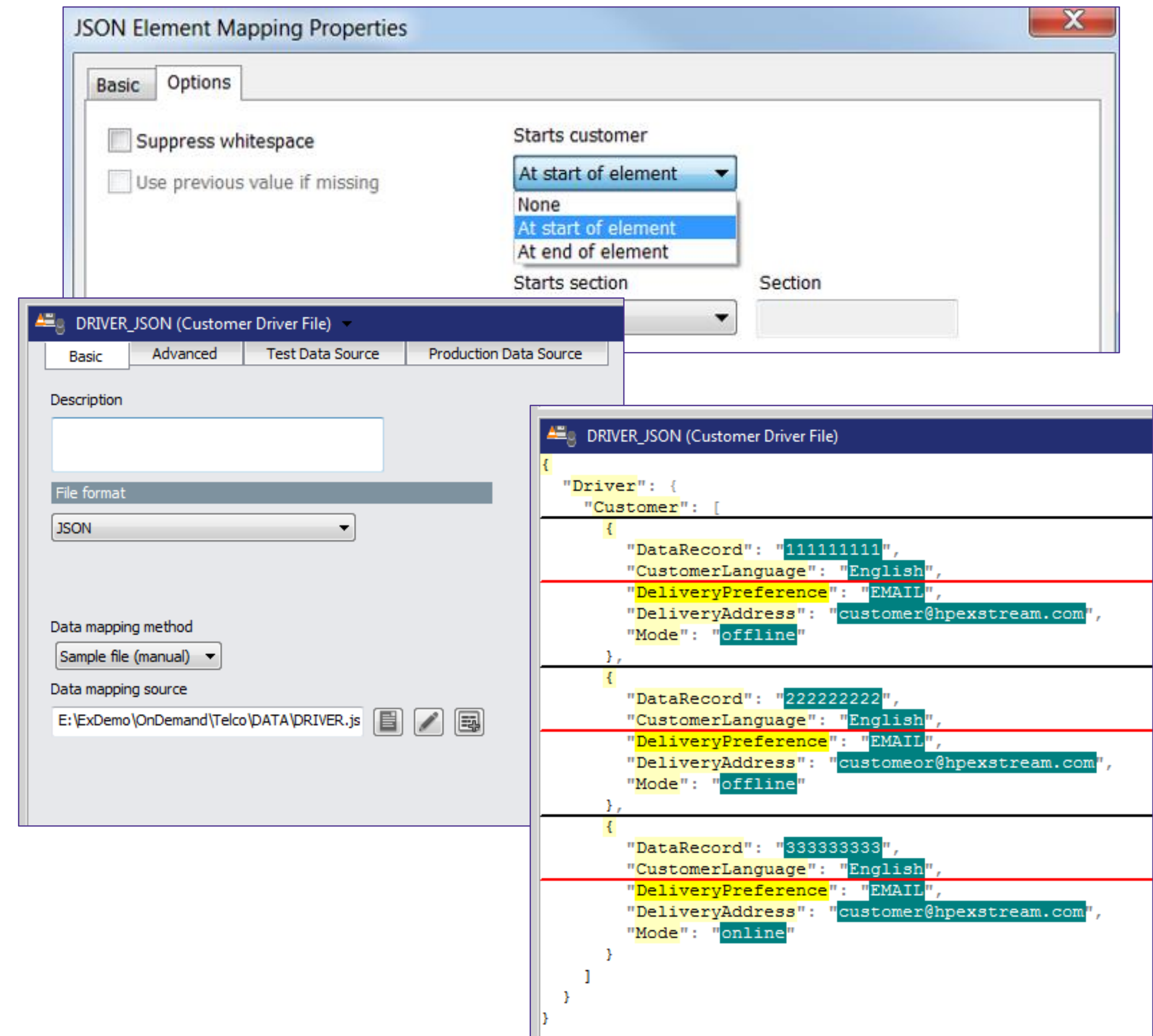
# Dynamic import of Common Asset Service (CAS) resources

- New option on placeholder variable properties to pull in CAS resources
- Uses the CAS resource ID to include the resource at engine run-time
- Supported image and resource formats: JPEG, PDF (Multi-page), PNG, PNG, TIFF, HTML, Docx, Plain text, RTF text, LIVE documents, Empower documents, DXF, and EPS

PlaceholderVar (Variable)

| Basic | Values | String Lookup | Output Format | Placeholder | Interactive |

Placeholder method

JPEG

Pages to import

All

☑ The file for each customer is unique

☑ CAS resource

Test Import connector

No Connector

Production Import connector

No Connector

Maximum number of files to hold in memory

5

Layout file

No Data File

Auxiliary PDF form layout

No Data File

IO time

After initial customer data

Responsive HTML design and output improvements

- Speed digital designs through enabling copy/paste of full CBD design layouts

- Graphic message support in CBD

- More granular control when designing for small screens (phones and tablets)

- Enhanced dynamic show/hide of content on small screens

- Extend responsive HTML features to HTML5 web output (previously limited to HTML email output)

- Vertical scroll bar support in HTML5 output

- New options for designing with custom CSS
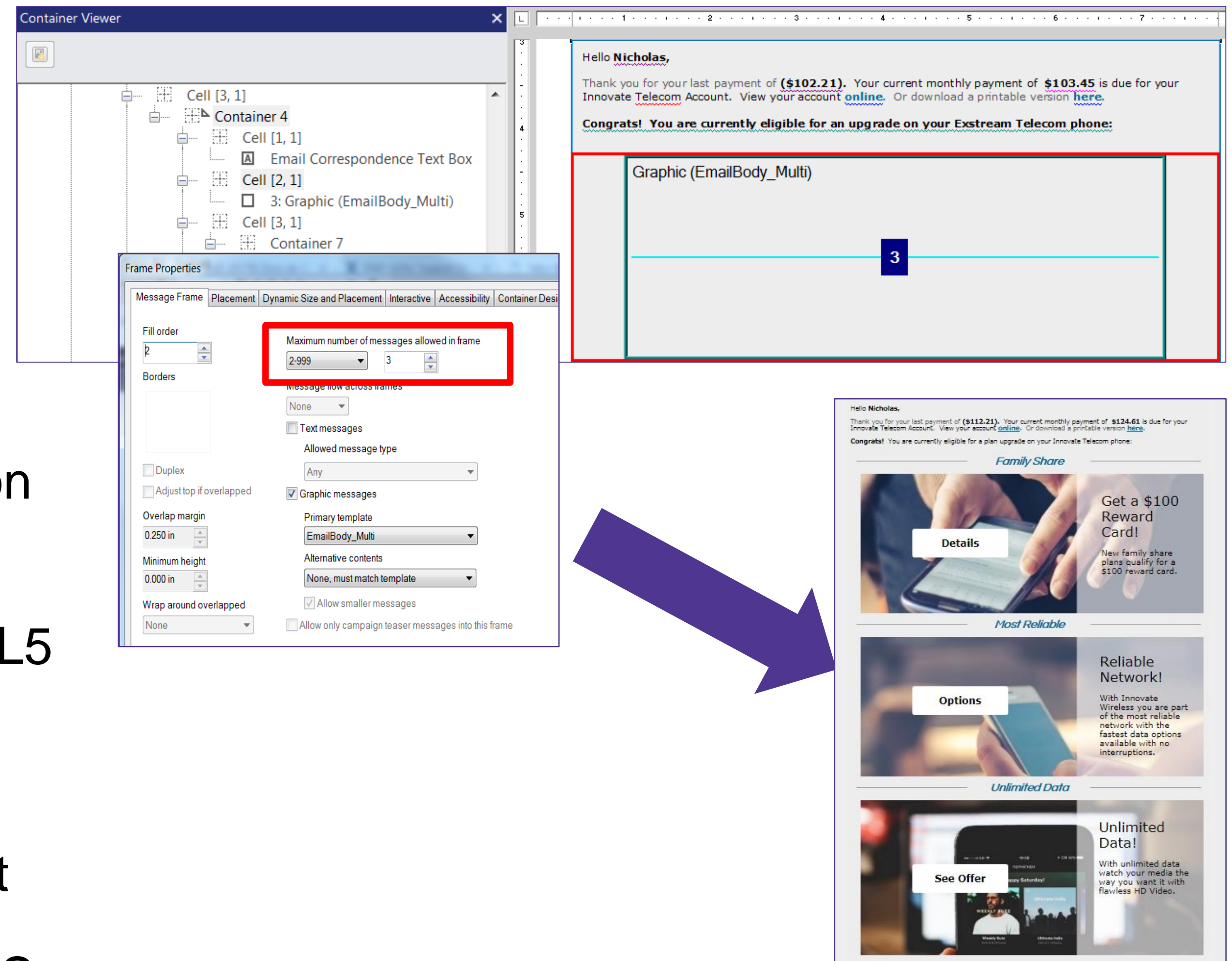
PDF bookmark improvements

- New option on the output driver to 'Include numbering for customers' on the Basic tab under PDF bookmarks
- Must enable Customer bookmarks to enable/disable customer numbering; Unchecking Customer bookmarks does not affect the other bookmark settings
- Available for PDF, PDF/A, and VDX output drivers
- The default value for the setting is "true" for existing output objects; new output objects will default to "false".
- Previous bookmark behavior is retained when upgrading to 16.3

Accessible PDF expanded language support

- Extended Accessibility language control for accessible HTML and PDF outputs
  - New Accessibility language control type – Static or Variable – in the UI (Design Manager and Designer)
  - Static is the default selection which either uses the 'Default' accessibility language or a language selected from the Accessibility language drop-down
  - The Variable selection allows an ISO code (ISO 639-1 or ISO 639-2 language code) to be used to specify the accessibility language for a language not available in the Accessibility language static drop-down list. For example, "sq" for Albanian

Accessibility

Accessibility language control type

Static ▼

Static
Variable

English (American) ▼
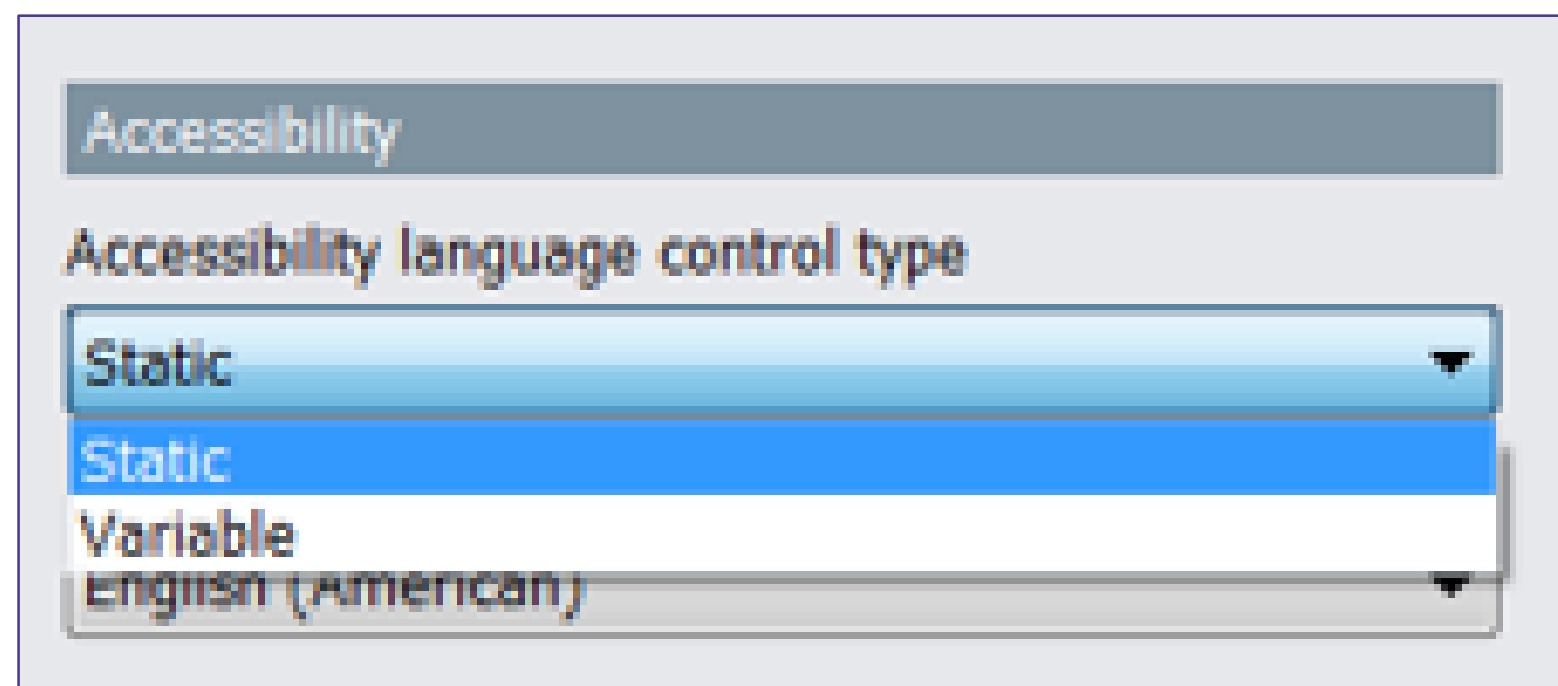
New Accessibility language control in
Design Manager and Designer

Advanced dynamic charting

**Expanded charting options**

- Advanced web-like **charting** and **visualizations**
  - Support for shadows, transparencies, and arbitrary labeling
  - Improved pie, bar, and line charts,
  - New charting possibilities for stocks, maps, bubbles, donuts, and pyramids
- **Create interactive charts** for HTML outputs, with drill-down on detail, as well as **print renditions** with color management
- **Enable customer interaction** through engaging charts, graphs, and tables
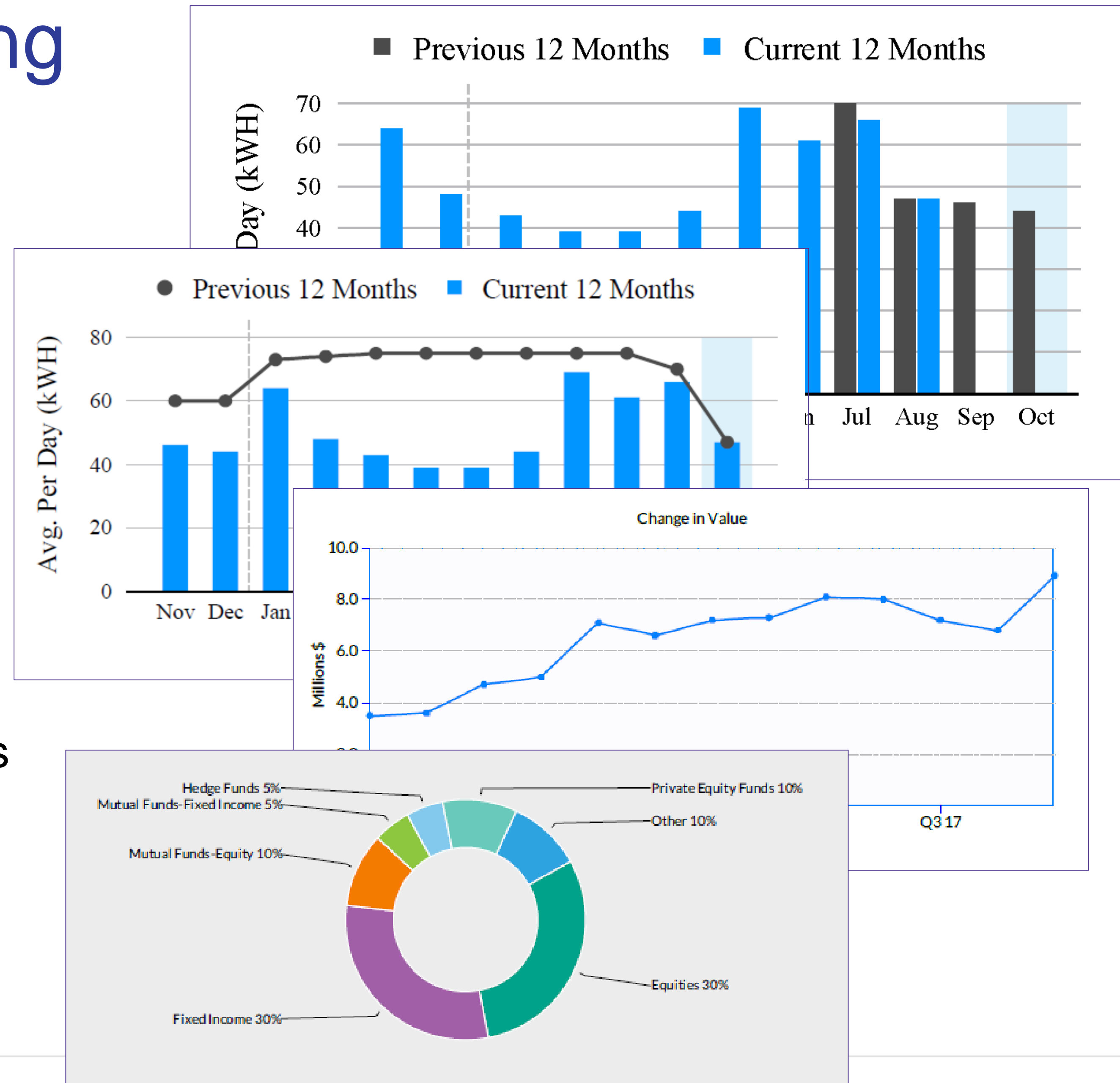
Advanced "Add-ins" architecture

HTML and JavaScript components to extend design capabilities

- Color QR codes

- Dynamic HTML tables

- Embedded chat

- Embed or leverage social media communication
(i.e. Tweet, Facebook messenger, WhatsApp, etc.)

- Embedded interactive video

- Augmented reality

- eForms

- Other dynamic and flexible custom data visualizations
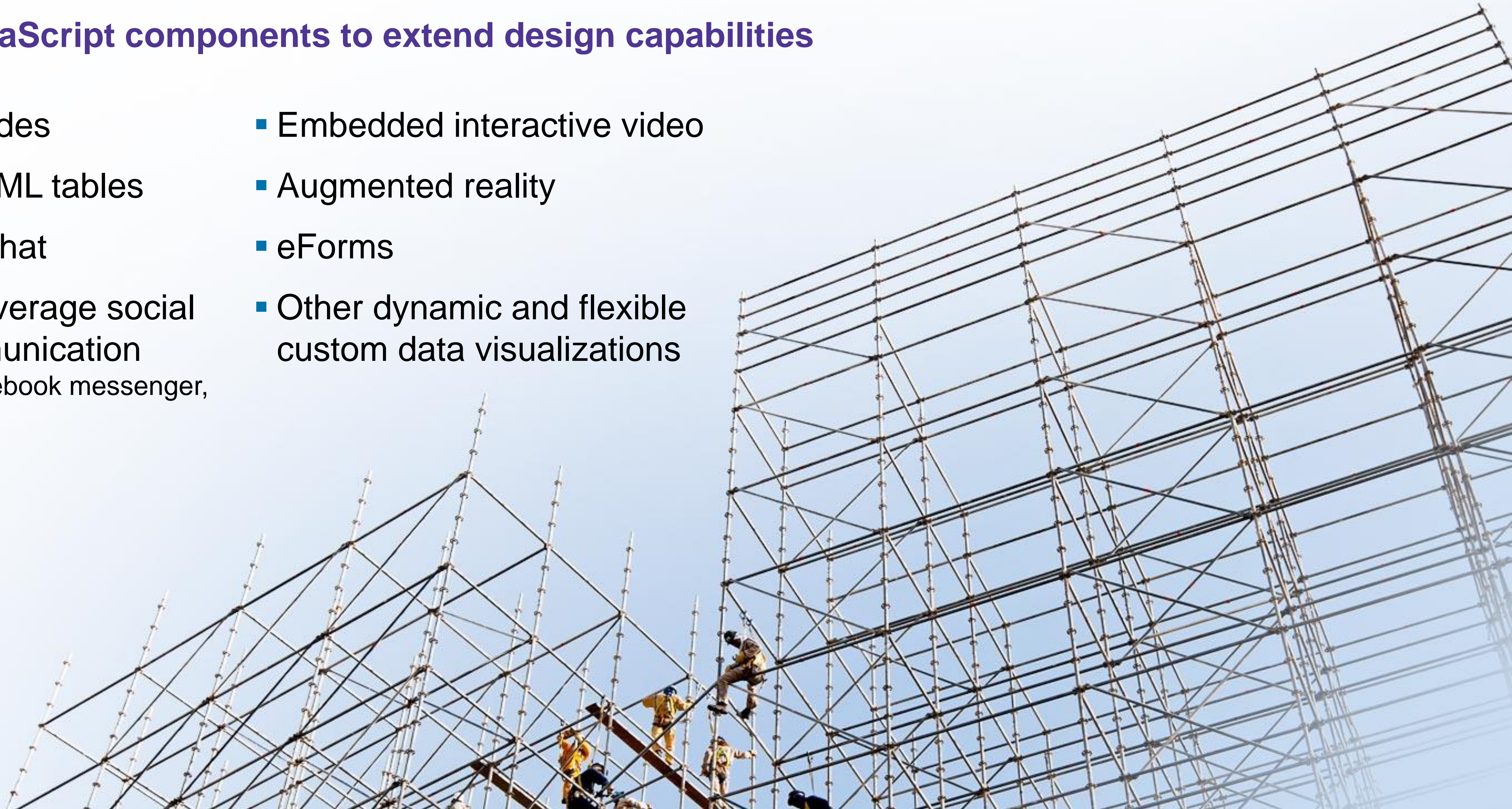
Custom add-in examples

A pie chart example similar to one created for a customer by OpenText Professional Services

Supply $59.78 $95.37 Delivery

Current Charges
$155.15
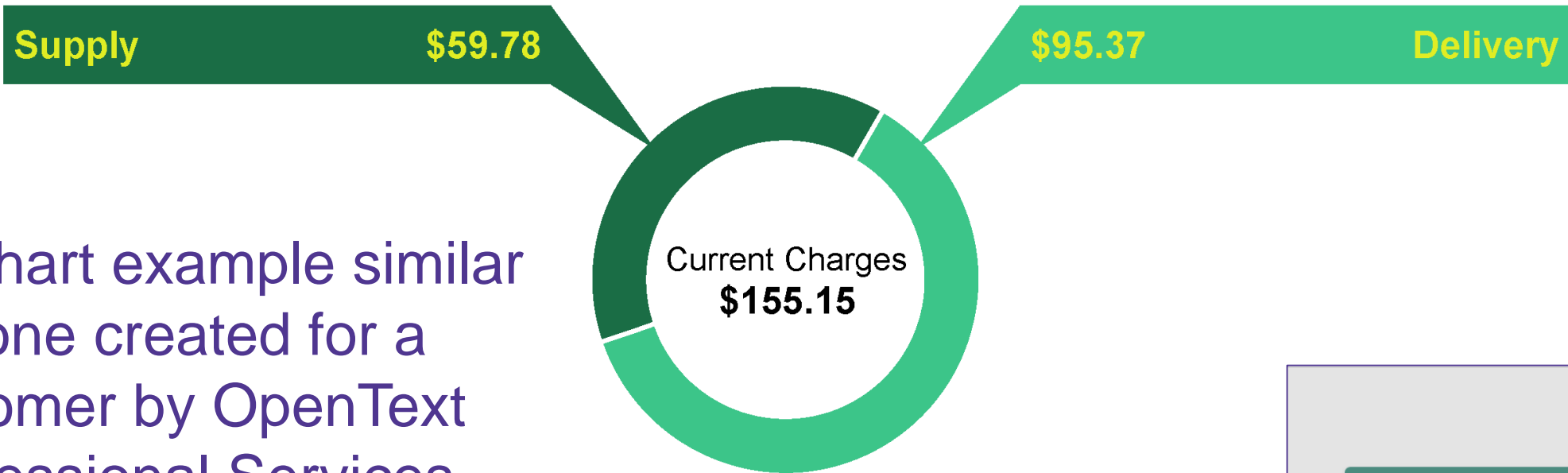
A stacked cylinder bar chart proof of concept created for a customer in Europe

2016
6 483 €
1 275 €
2 830 €
31 796 €
7 991 €
55 885 €

App ready.

Comic Sans   16   B I U Font Color

Table Data

Eye Candy

Pagination

Pagination Properties

Page Numbers ☑

Previous & Next ☑

First & Last ☐

Size 5

Design   Preview

Show 10 entries   Search:

Team	Conference	Division	Record
Arizona Cardinals	NFC	West	7-8-1
Atlanta Falcons	NFC	South	11-5
Baltimore Ravens	AFC	North	8-8
Buffalo Bills	AFC	East	7-9
Carolina Panthers	NFC	South	6-10
Chicago Bears	NFC	North	3-13
Cincinnati Bengals	AFC	North	6-9
Cleveland Browns	AFC	North	1-15
Dallas Cowboys	NFC	East	13-3
Denver Broncos	AFC	West	9-7

Showing 1 to 10 of 32 entries   Previous 1 2 3 4 Next

Reset   Cancel   Save

HTML table add-in

Examples

Hello world
HTML:
```
<svg id="barcode"></svg>
```
Javascript:
```
JsBarcode("#barcode", "Hi world!");
```
Result:

Hi world!

Example with options
HTML:
```
<svg id="barcode"></svg>
```
Javascript:
```
JsBarcode("#barcode", "1234", {
    format: "pharmacode",
    lineColor: "#0aa",
    width: 4,
    height: 40,
    displayValue: false
});
```
Result:

Declare options in HTML
HTML:
```
<svg class="barcode"
    jsbarcode-format="upc"
    jsbarcode-value="123456789012"
    jsbarcode-textmargin="0"
    jsbarcode-fontoptions="bold">
</svg>
```
Javascript:
```
JsBarcode(".barcode").init();
```
Result:

1 23456 78901 2

Barcode add-in examples

# Online documentation and private help server support

- Improves customer access to Exstream product documentation
- Exstream product documentation is now available on the OpenText Global Help Server
  - MySupport credentials no longer required to view online documentation when accessed from within the Design Manager/ Designer UI (under Help menu)
- Customers can alternatively deploy an OpenText Private Help Server instance for on premise online documentation access
- HTML and PDF versions of Exstream documentation will continue to be available as downloadable zipped archives from the OpenText MySupport portal

Exstream Platform

StoryTeller Designer

StoryTeller improvements

- SVG can also be used as an image in CAS

- 'Script on invoke' allows changes before other events (example: run scripts prior to data transformations)

- Ability to store named resources in SSD

- Multiple supported URL enhancements

- Chart enhancements
  - Donut charts, data label rotations, improvements in line charts, unification of border lines
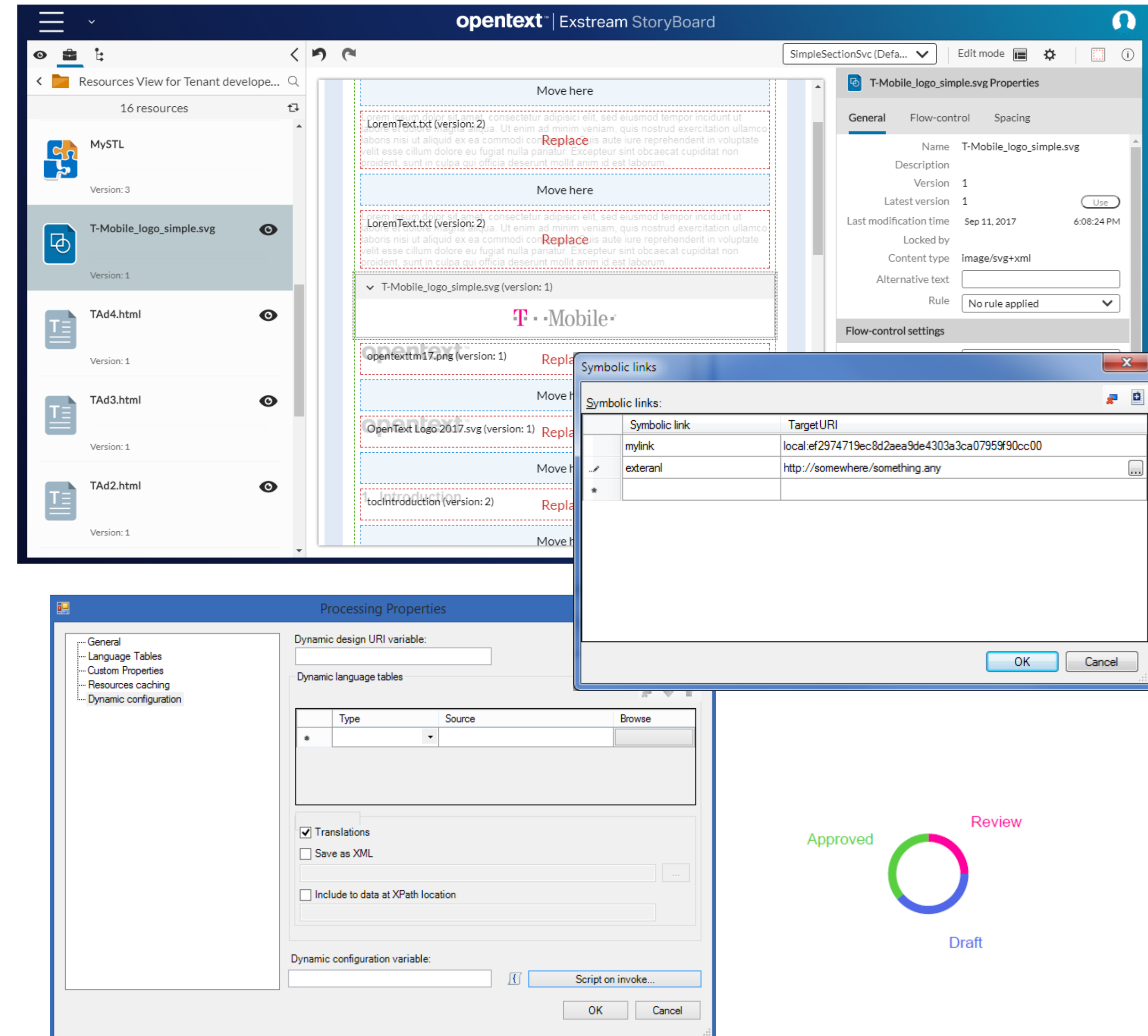
Web applications

What's new in Exstream 16.3

Extended role-based application control

Web Applications

- Create custom roles in addition to tenantadmin, user, ondemand and reviewer
- Ability to control access to various web applications and actions
- New UI for defining ACL policy for new roles (CAS resources, categories and metadata)

CAS resource workflows and approvals

Web Applications

- Corporate control over resource approval and usage on critical communications
- States on CAS resources: draft, review, approve, reject
- Role based state change workflow
- All resources in a Theme must be approved to publish theme
- Theme level cascading approval
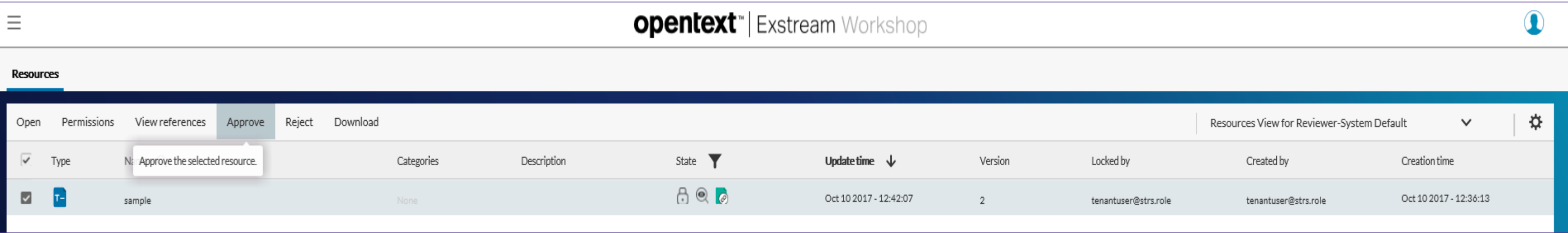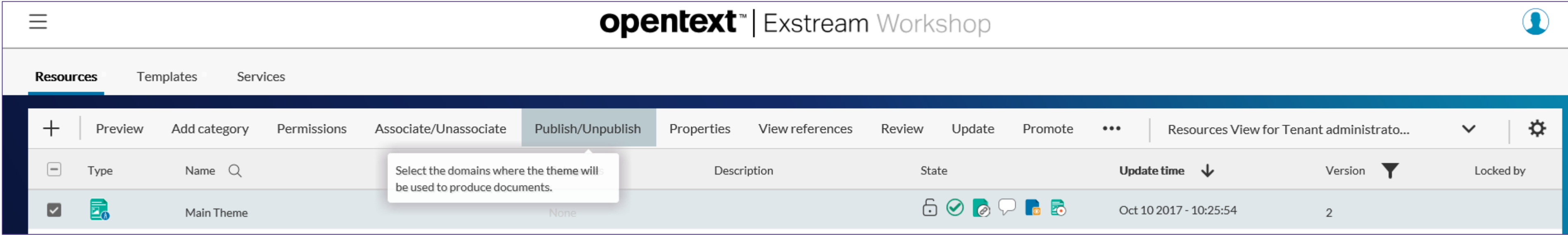
CAS resource workflows and approvals

**Tenant user submitting a resource for review**

Tenant reviewer can approve or reject

Tenant admin can publish / unpublish the theme

New properties panel in StoryBoard, ReTouch

- Gives business users authoring/editing content in StoryBoard and ReTouch the ability to more efficiently display and edit properties associated with the active resource
- New property panel in StoryBoard and ReTouch is available for theme, section, group and object level
- Different properties options displayed, depending on object type
- Enables multiple new business user activities, including:
  - Update a resource to its latest version in property panel
  - Edit a copy of an existing text resource
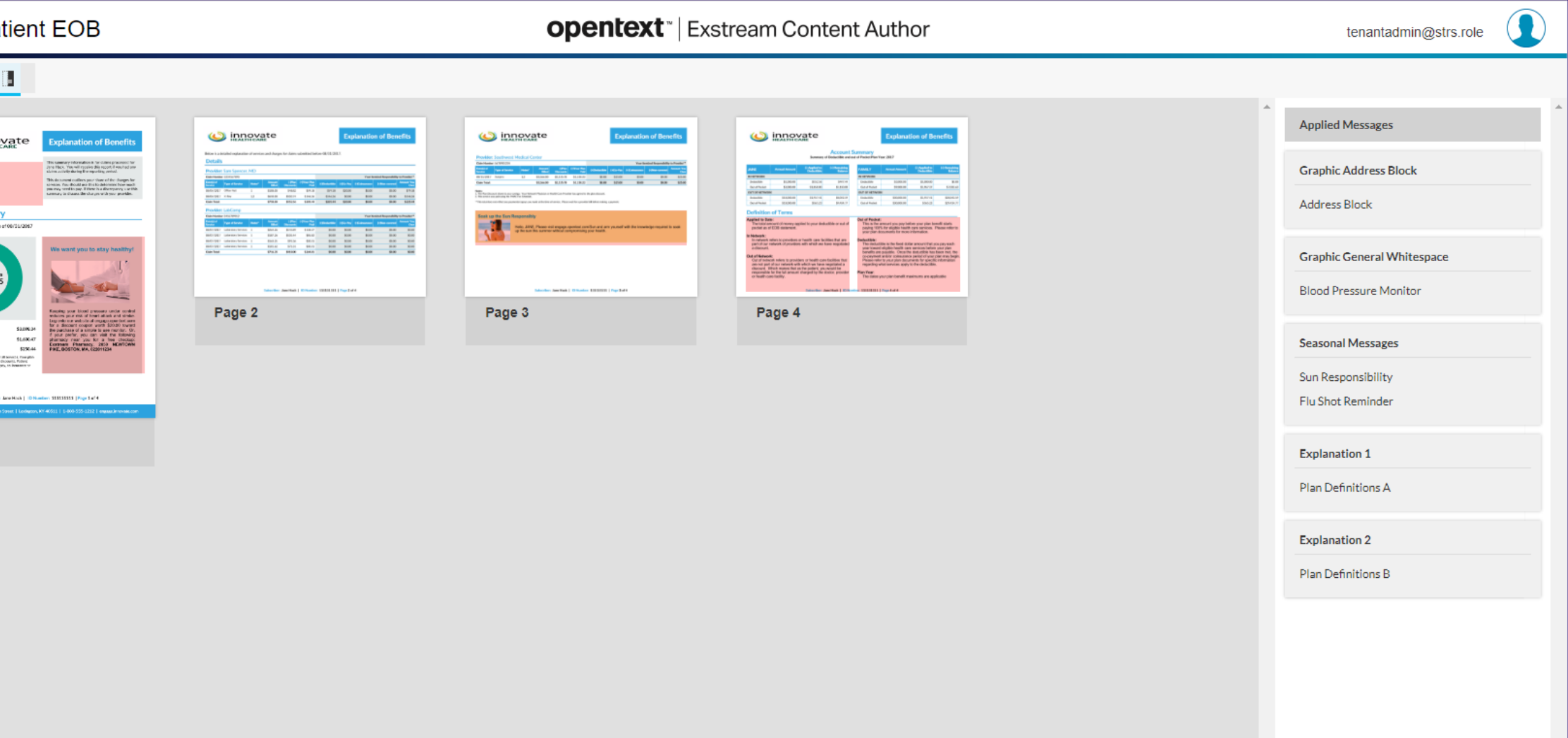 - Create groups and define rules for a whole group
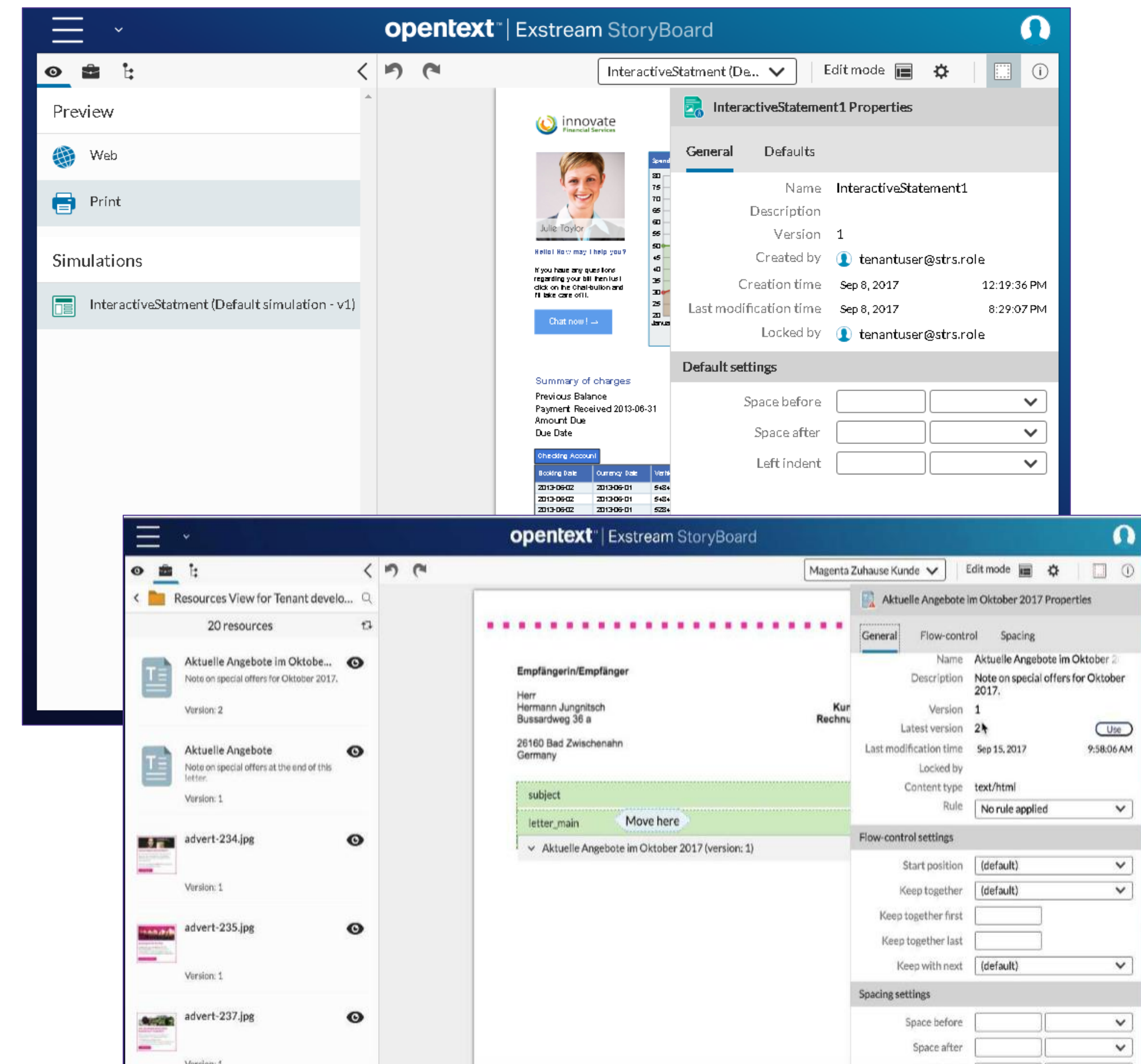
Content Authoring

What's new in Exstream 16.3

Exstream Content Author

new

- **Intuitive, browser-based thin-client environment** to enables business users to control communications content

- Business users can easily…
  - create/update message content (text or graphical)
  - allocate messages to template layout in predefined areas
  - author messages in context of communication
  - work with business rules and variables to drive personalization of content
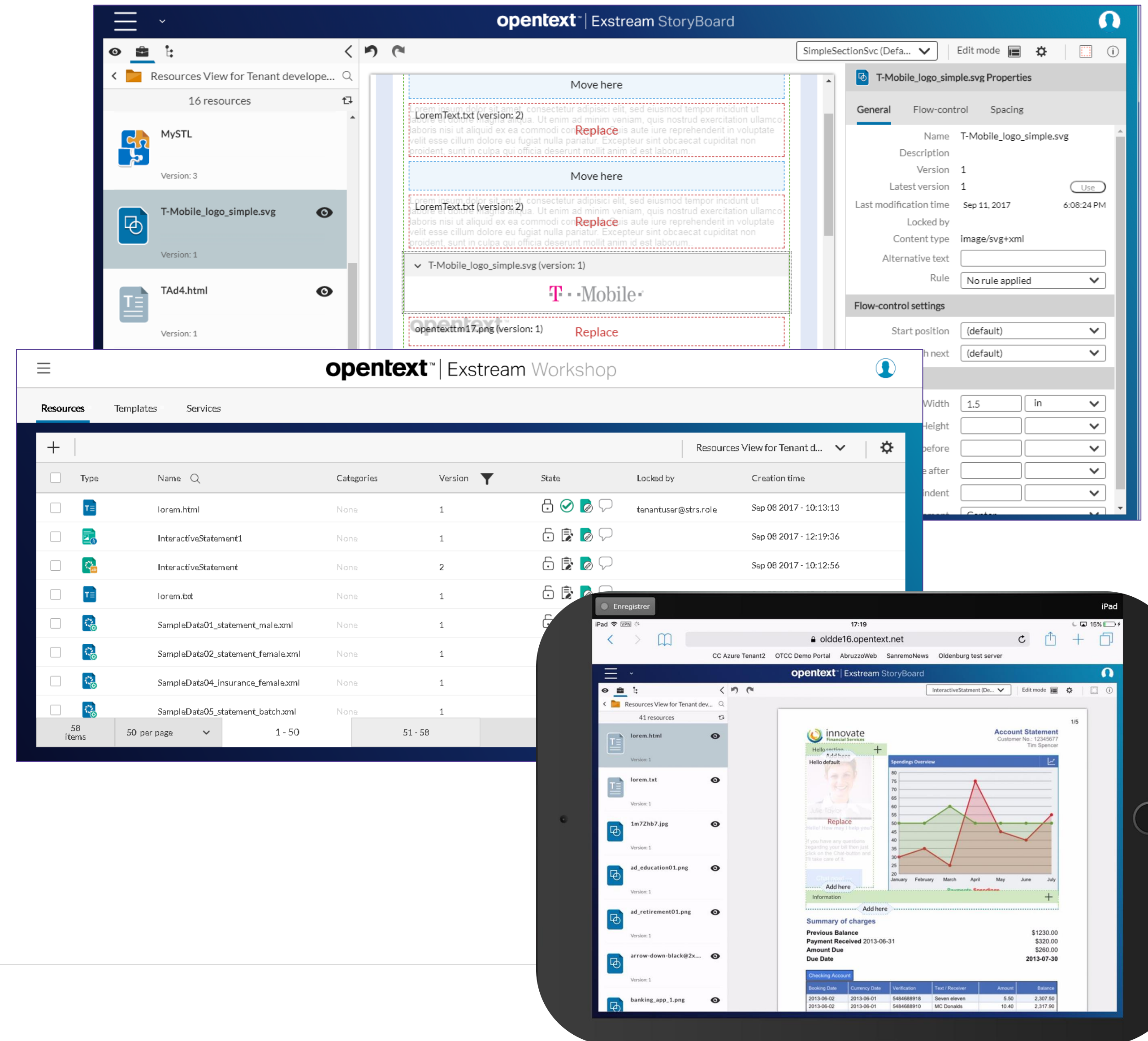
Exstream Content Author

new

- Designers build applications in Exstream Designer/Design Manager, deploy into Common Asset Service (CAS) repository

- Use message frames in design to identify authoring areas for content creators

- Message content stored in CAS, leveraging common data model with Templates and Themes

- Batch or ondemand fulfillment provided through Communications Server using the Exstream Engine

- No repackaging required – content read and include natively from CAS at run time
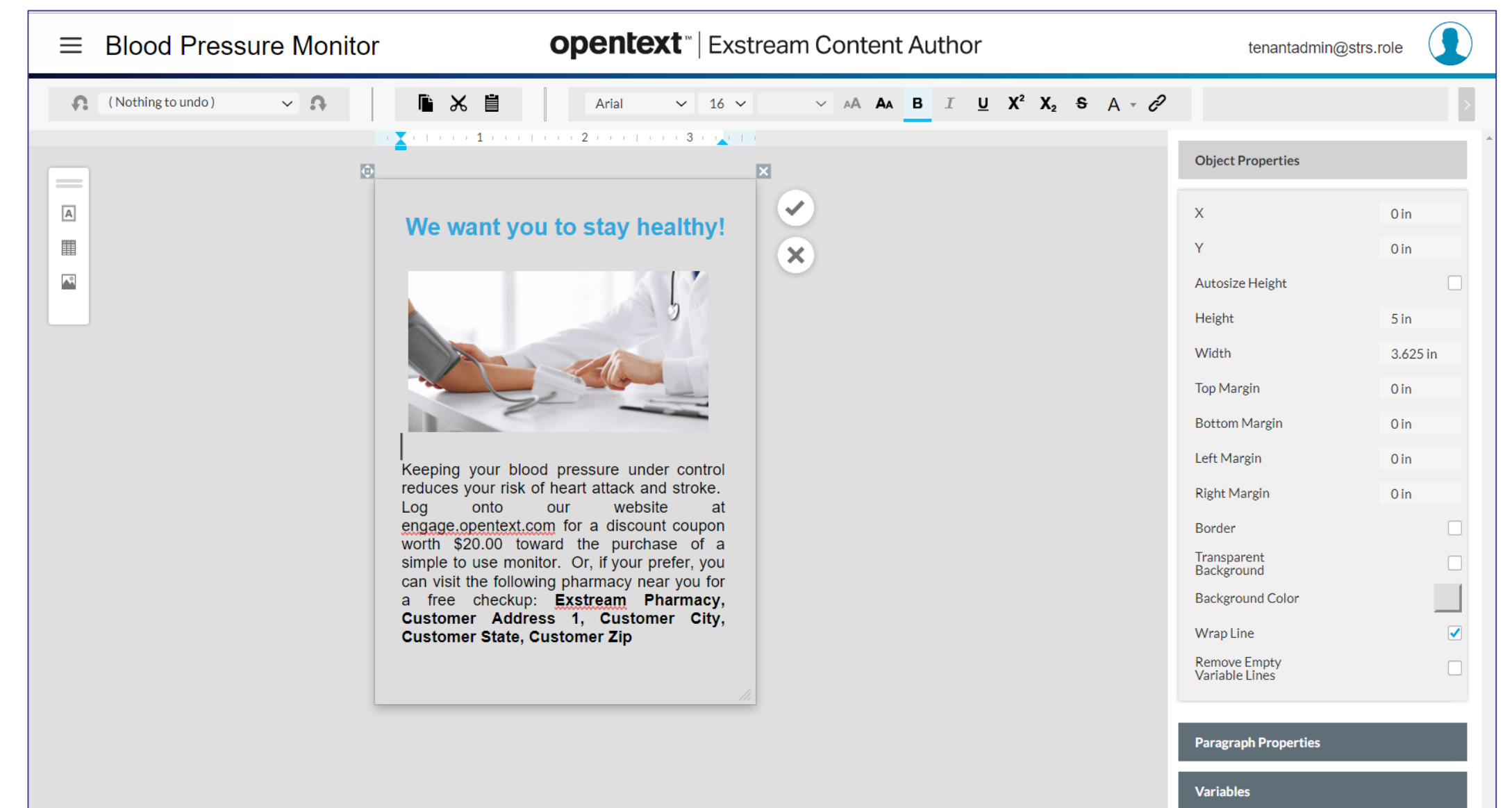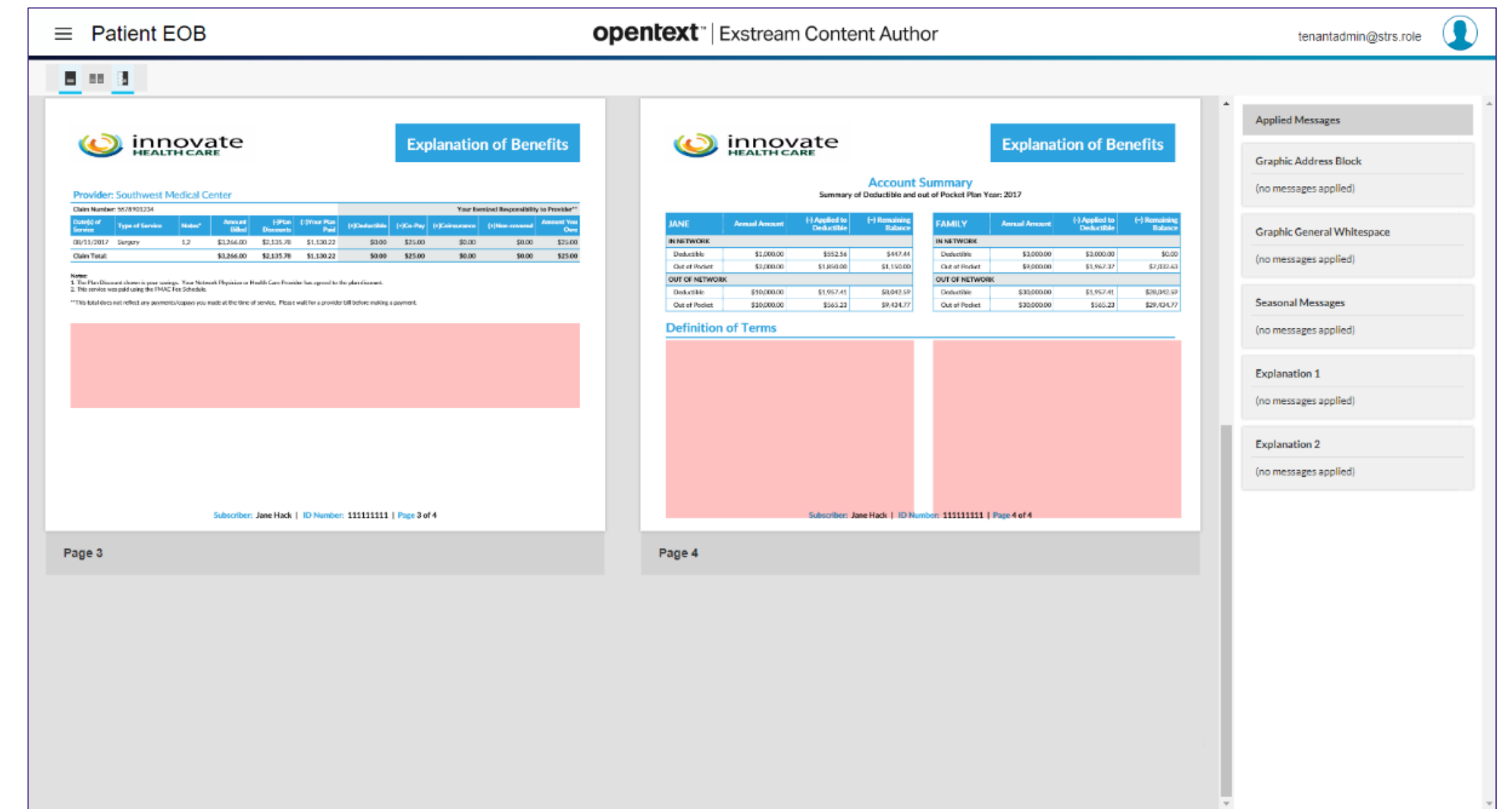
StoryBoard and Workshop improvements

- Enhanced **mobile device preview** with StoryBoard

- Digital **content authoring** and simulation **for any device**

- Bring changes to production in Workshop for any Theme/Template

- Enhanced content control with layout properties
  - Feature parity for StreamServe 5.6.2 customer upgrades

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Exstream for Salesforce

- Easy to use interactive or on-demand document generation based on MS Word + plugin templates

- **Business content authoring** with familiar tools like MS Word combined with web technologies

- Web based, **interactive** editing, integrates to DocuSign and central delivery and archiving

- Standard integrations to CRM systems like Salesforce.com, MS Dynamics, Siebel CRM etc.

- SaaS based deployment option for Salesforce

*16.3 focus on simplifications, architectural and security improvements*
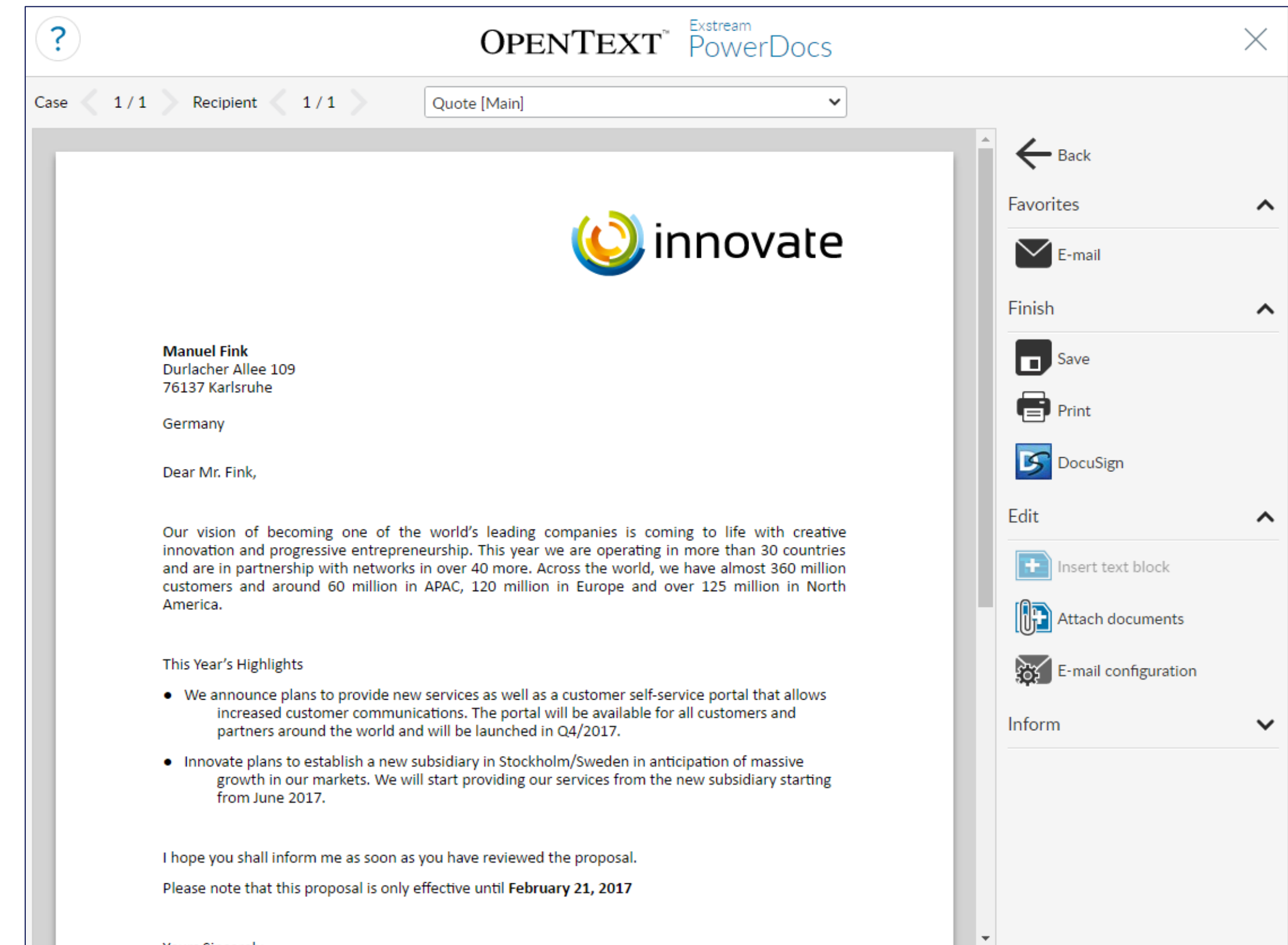
Interactive

What's new in 16.3

Interactive: Empower Editor advancements

Zero-install, controlled editing for users to quickly and easily personalize communications

- Edit in the appropriate channel view for email/digital communications

- Use a template and data file for ad hoc, one-to-many personalized communications

- NEW in **16.2**

  - Required area navigation

  - Revision tracking

- NEW in **16.3**

  - UI/usability improvements

  - Role-based editing

  - Enhanced cut and paste into editable areas – images, simple tables, hyperlinks
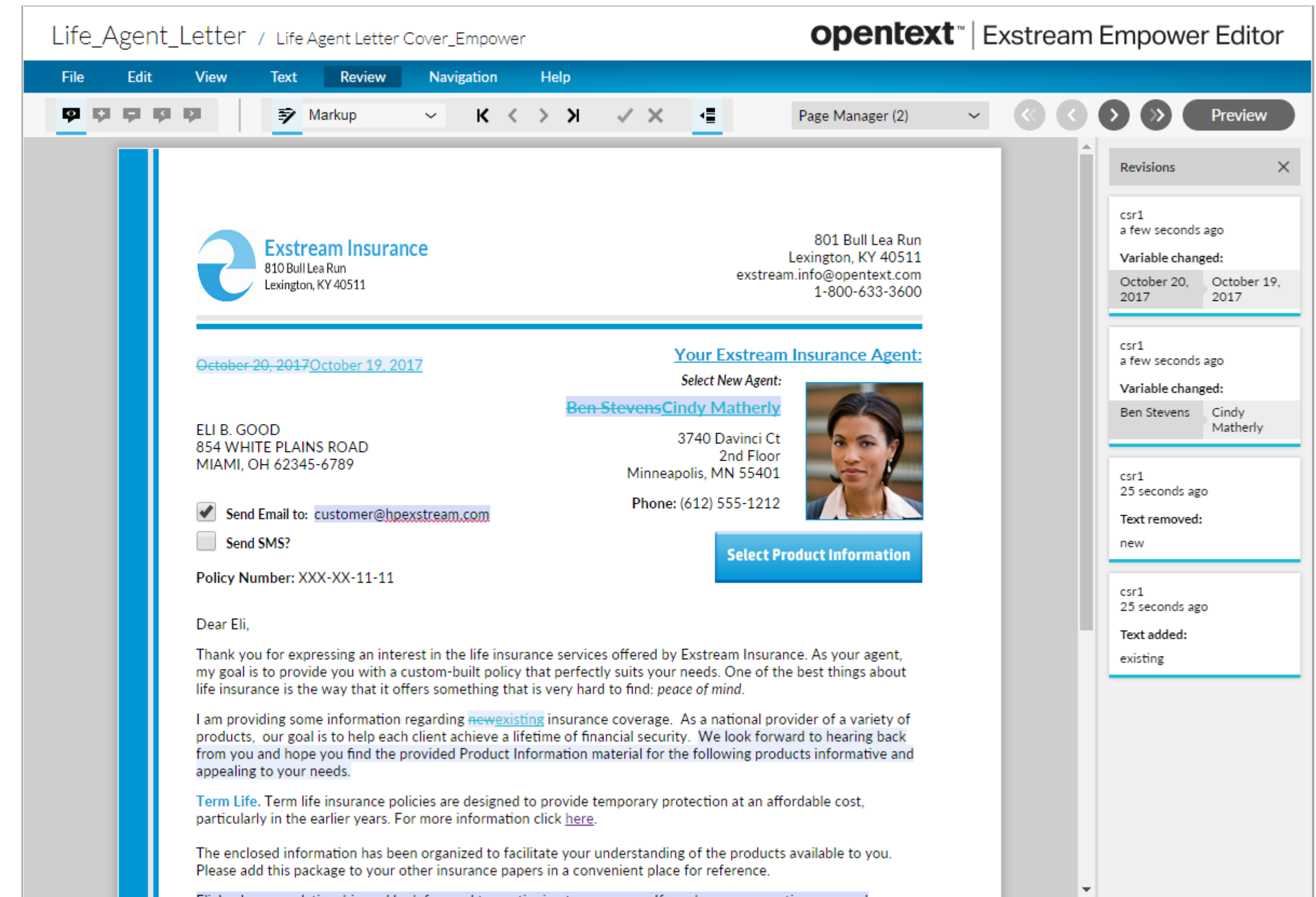
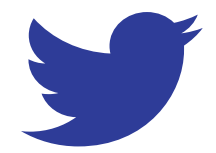# Interactive: ReTouch advancements (StoryTeller designs)

Zero-install, review and editing of communications
on touch devices

- Edit in channel views for email/digital communications or paginated output

- Improved page navigation

- Editing productivity and usability improvements

- Performance improvements
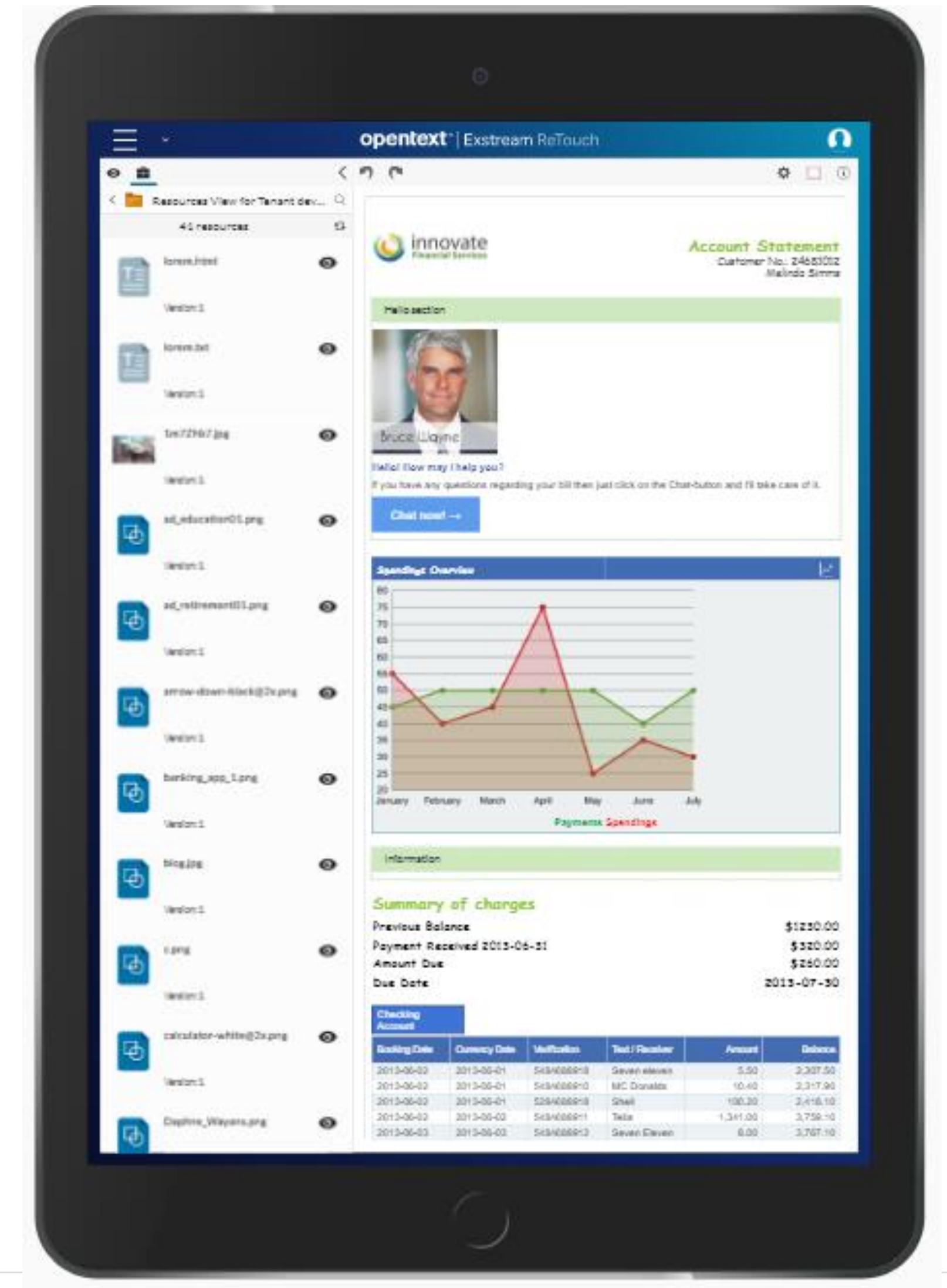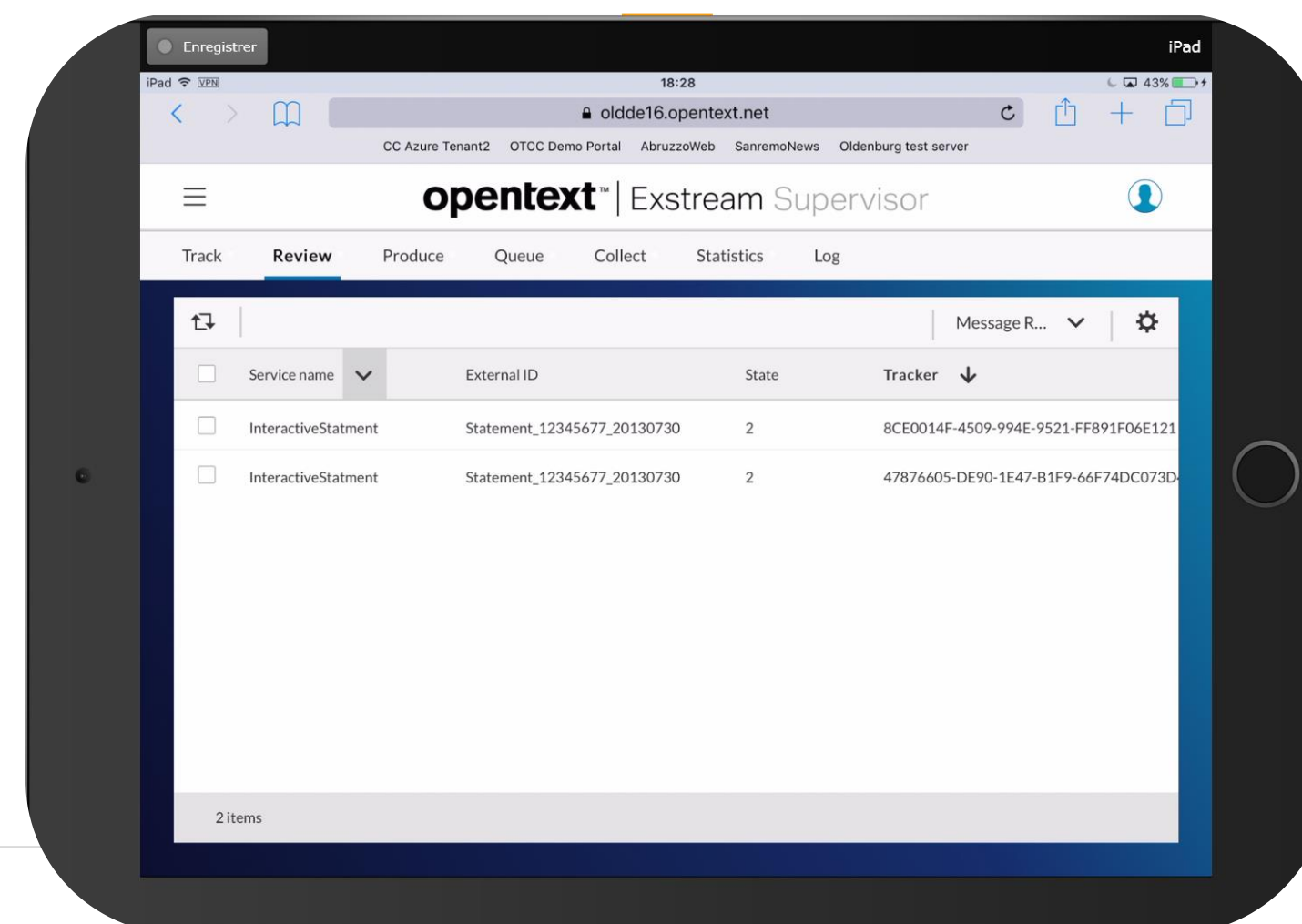
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