

The WyldLynx Cafe

A Menu For Modern
Information Management



Our Menu for Today

- **Starter:** Data discovery and risk protection
- **Main:** Easier compliance with Content Manager
- **Side:** Safer collaboration with M365
- **Chef's Special:** Tailored solutions
- **Sweet Treat:** Optimising for AI

Starter:

*Data discovery and
risk protection*

Know what you have in the kitchen

Before we serve anything, we must know what we have...

- What information do you hold?
- Where is it stored??
- Who can access it ?
- What is duplicated, obsolete, sensitive and unmanaged?
- What should be retained, protected, remediated or disposed of?

What we see

Many organisations have:

- Millions of documents
- Unknown sensitive information
- Duplicate content
- Legacy data in legacy systems
- Information stored across multiple systems
- Sensitive and valuable information outside the approved Records Management system

Before you can govern information, secure it or apply AI to it, you need to understand what's actually in your environment.

Use Case – Large Government

Problem

- The organisation holds a number of credit card details and needs to understand where these are and remove them.
- Would like to achieve PCI DSS and Merchant Level 1 compliance

Goal

- To find all credit card patterns
- To remove all data relating to current and valid credit cards.

Results

- Content Manager, Network Drives and Exchange being scanned
- Organisation can now defensibly destroy information holding credit card details
- Further risk items identified for a bigger compliance picture

Use Case – Large Government

Addresses	10,700,698	
AUS VISA 16	11,848	
Bank Account Numbers	1,010,165	
Bank Details	229,188	
Blood Test	328,843	

Unique Student Identifier (USI)

JYJUA

Proof of identity

Document type Document type - Other Document number

#1 Driver's license *****

No parent/guardian

Credit Card Numbers (All)

32,514



Australian Government
Australian Taxation Office



Driving License Numbers (Australia)

6,915



Social Security Taxation Id

2,954,883



Healthcare ID Number (Australia)

11,795



Passport Number

91,521



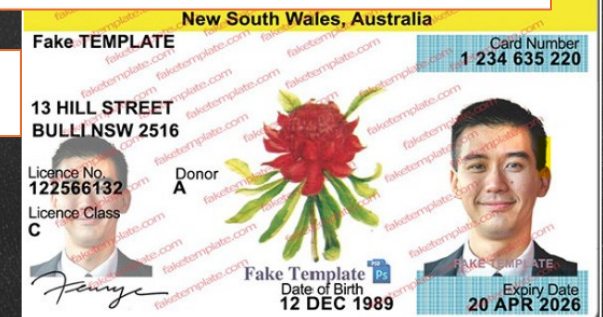
Addresses (APAC)

2,574,970



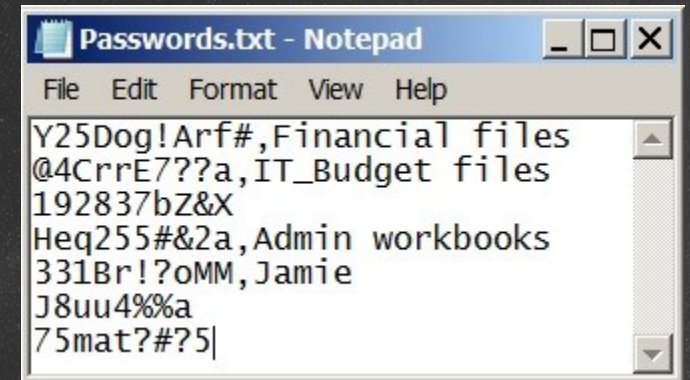
[Addresses \(Australia\)](#)

2,574,...



Use Case – SOCI Entity

- Identified Passwords and Usernames
- Found in Content Manager and Network Drive
- System Admin Passwords for a major application



Main:

Easier compliance with
Content Manager

Compliance doesn't need to be 400 fields

- Reduce unnecessary decisions for users
- Capture information in the flow of work
- Apply governance behind the experience
- Use familiar structures and simple language
- Make the compliant action the easiest action

Example of 400 fields

MC FILE - C-MC-2

General
Prescriber
Clinical Trial
Wholesale - Manufacture
Dispensing
Internal Review
Admin and Reporting
Conditions
Compliance
Self Assessment
Contacts
Notes
Security/Access
Record Actions
Related Records

Classification
■ MCU/PHRU

Title (Free Text Part)
■ Single Patient Provider - Dr Downer - Ned Lift

Date Created
■ 05/04/2018 2:31:00 PM

Owner
■ Eddy, Sarah ☐ Physical File Exists?

Assignee
■ <At home> Eddy, Sarah

Application For:
Single Patient Provider

Applicant Name
Downer, Ima (Dr.)

Prescriber Qualifications

Applicant AHPRA Registration
2321df

Pharmacy Business Name
Dollar Deals Pharmacy

HHS
Medicinal Cannabis Unit

Application Type (MC)
Application for Amendment of

Number of Cannabis Products
5

Application Status
Complete

Date Received
01/03/2018

Date Initiated
15/03/2018

<Enter an update comment for the audit log> OK Cancel Help

Preview

General
Notes
Security/Access

Title (Free Text Part)
■

Folder
■

<Enter an update comment for the audit log> OK Cancel Help

Make Compliance Invisible

Traditional Approach

User Must:

- Choose classification
- Understand records terminology
- Complete mandatory metadata
- Navigate a complex interface

Make Compliance Invisible

Better Approach

User:

- Saves document
- Works normally
- Governance happens in the background

People don't hate compliance. They hate complicated systems.

Use Case: WyldLynx

- We don't have an office – all staff work from home (cool before it was cool)
- No on-premise infrastructure (all M365 and Azure)
- All devices are managed via Intune (Endpoint Manager)
- Use of CM since the business started internally, lots of business functions in CM and automations/integrations
- Staff in QLD, VIC, NSW and ACT

Client Files, Internal and Employment

Record Number	Title
CMC/147	Per
CC/00529	Support - Per
CC/00371	Job Specification and Delivery
CC/00370	Quotes, Proposals and Licensing

IC/18/1	WyldLynx - SmartMove
TR21/2/68	WL - SmartMove
TR19/6/334	WL - SmartMove
IC/19/5	WL - SmartTools - Stand Alone WyldLynx Licensing
TR19/5/178	WL - SmartMove
TR19/1/8	WL - SmartMove
D18/29	Development and Installation - SmartMove
D18/8	Marketing and Brochures - SmartMove

Record Number	Title
IC/19/8	Employment Contracts
D24/46	Tes
D24/44	Asf
D24/42	Jua
D24/14	Anl

Training Content

TR24/11/482

Quick Tips and Shortcuts Guide

TR24/11/481

Apply Access Controls

TR24/11/480

Assign and Audit Physical Records

TR24/11/479

Add a Note

TR24/11/478

Understanding Content Manager Automation Options

TR24/11/477

Electronic Signatures using DocuSign

TR24/11/476

Format View Pane for Multiple Record Types

TR24/11/475

View Pane - Edit Record Metadata

TR24/11/474

Dashboard

Record Type

Container

Container Hierarchy

Record Number

Title

Date Created

Date Registered

Assignee

Security Level

Security Caveats

Access Control

Checked Out To

Training Material Status

Training Type

Training Material Source

Product Module

Product Version No.

Product User Type

Product Object

Unique Identifier

Training Material

D24/58: Content Manager 24.4 Full Client

IC/24/3: Content Manager 24

D24/58: Content Manager 24.4 Full Client

TR24/11/482

Quick Tips and Shortcuts Guide

Tuesday, 19 November 2024 at 7:43 AM

Tuesday, 19 November 2024 at 7:43 AM

In container 'D24/58 (Shaw, Debi)' since Tuesday, 19 November 2024 a

[No security level]

View Document: <Unrestricted>

View Metadata: <Unrestricted>

Update Document: <Unrestricted>

Update Record Metadata: <Unrestricted>

Modify Record Access: <Unrestricted>

Destroy Record: <Unrestricted>

Contribute Content: <Unrestricted>

Review

Quick Guide

WyldLynx Pty Ltd

Full Client

CM 24

End User

Content Manager

70754

Training Material - TR24/11/482

General

Document Review

Notes

Record Actions

Electronic

Renditions

Contacts

Related Records

Title (Free Text Part)

Quick Tips and Shortcuts Guide

External ID

Date Created

19/11/2024

7:43:55 AM

Author

Shaw, Debi (Mrs)

Container

D24/58

Enclosed?

Assignee

<At home> D24/58

Training Material Status

Review

Training Type

Quick Guide

Training Material Source

WyldLynx Pty Ltd

Product Module

Full Client

Product Version No.

CM 24

Product User Type

End User

Product Object

Content Manager

Product Object (2)

Product Function

Training Video Created

Training Video Link

<Enter an update comment for the audit log>

OK

Cancel

He

Action - Create and Review Process - Quick Guides, Tech Notes, Policies, Procedures, Templates

General Action Steps Instructions

	Days	Hours
Based On Action		
Create Content	14	
Review Step - Content	5	
Review Step - Format and Finalise	5	

Built around your business processes

- CM can be simple
- CM can be built around the business process and reduce manual effort
- CM can be integrated to be the storage tier from 3rd party systems (Microsoft 365, Civica, DocuSign etc)
- CM can automate or integrate routine tasks for the business

Side:

*Safer collaboration
with M365*

What we see

- IT want to use M365 to solve all the problems of the world
- Clients who have \$1 Million + Storage bill from Microsoft each year
- No ability to deduplicate content
- Purview not implemented or implemented poorly without IM at the table
- Inability to defensibly “dispose” (not delete) content
- Users want to use M365 but “capturing records” gets in the way
- Records Management is circumvented

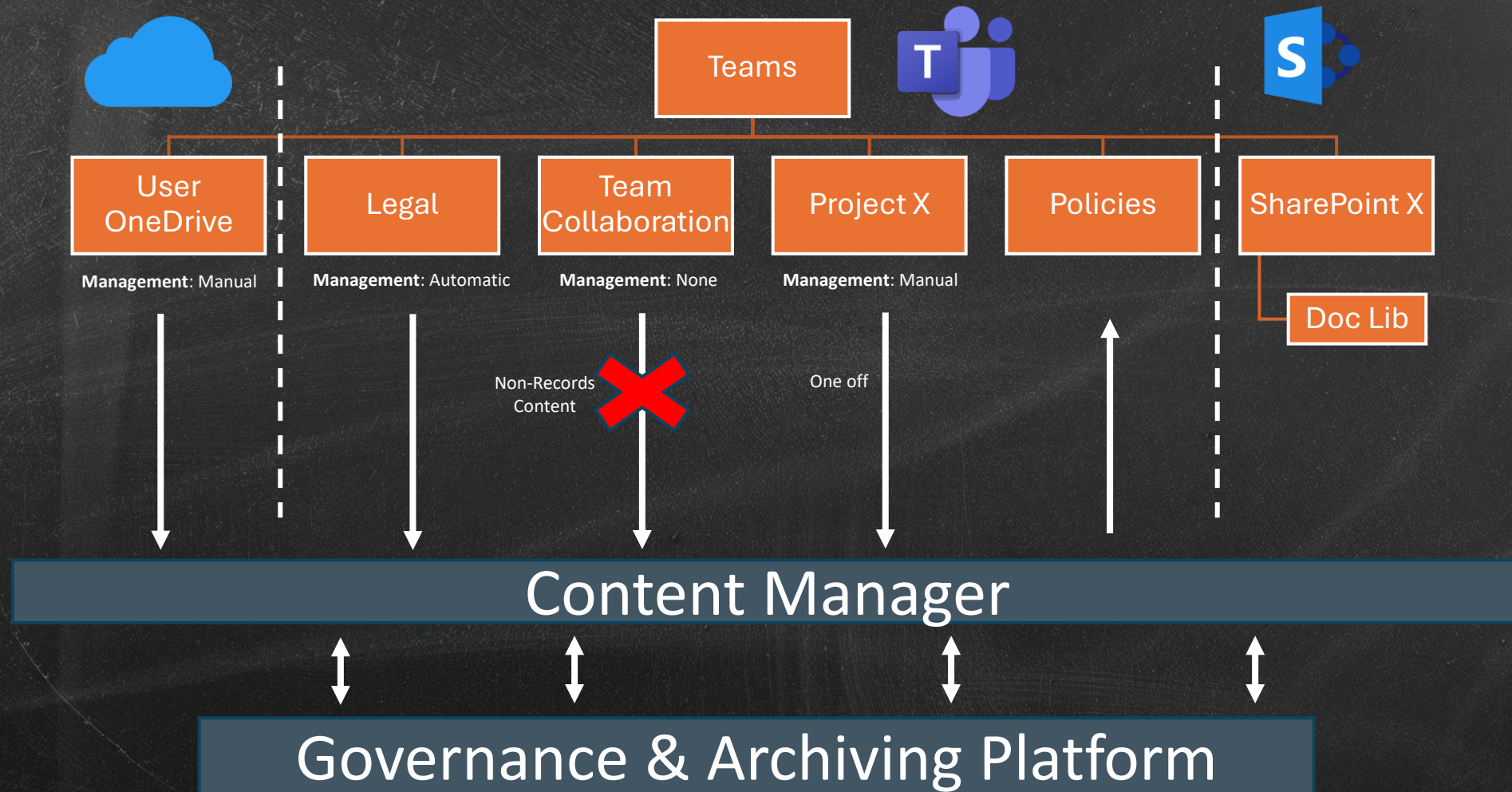
M365 and Content Manager/Content systems work better together when each does what it's built for:

M365 for everyday collaboration, and Content Manager for managing records throughout their lifecycle.

Let people work where they work, without leaving governance behind

- Collaborate in Teams and SharePoint
- Preserve, govern and archive records in Content Manager
- Maintain appropriate security
- Reduce duplicate systems and manual handling
- Use the existing product/integrations, before buying another add-on

Governance with Teams App



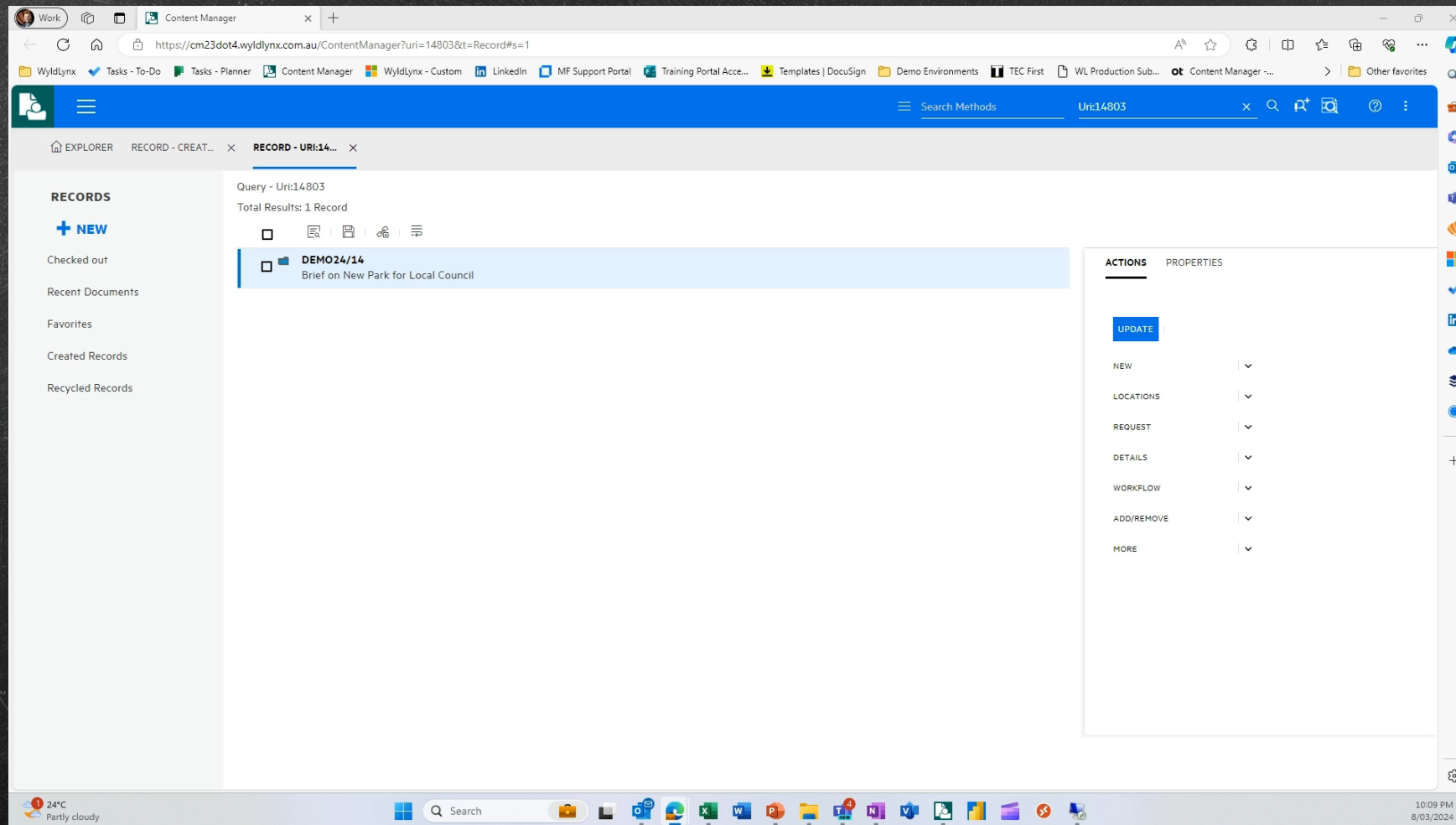
Teams - Pane of Glass



Teams – No User Interaction



OneDrive – Collaboration



Chef's Special:

Tailored solutions

WyldLynx Secret Sauces

Use Case: Information Access Unit

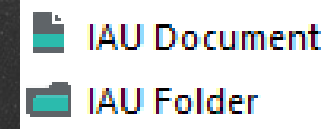
- Two aging systems
- No Vendor support
- No unified case management processes or templates
- Siloed business processes across 5 facilities
- Non-compliant recordkeeping practices
- Insufficient storage – network drives running out of space

Use Case: Information Access Unit

Content Manager used primarily for:

- Creating new applications
- Creating locations
- Running reports
- Adding and inserting actions
- Editing applications
- Completing actions

Classification
* KNOWLEDGE AND TECHNOLOGY - INFORMATION ACCESS AND DISCLOSURE
Title (Free Text Part)
*
Application Status
* Active
Scope of Application
Application Subject
*
☐ Date of Birth Required
Applicant or Agent
*
External Reference
Initial Request Type
*
Second Request Type Change
Request Receipt Date
*
Decision Date
Date Documents Sent

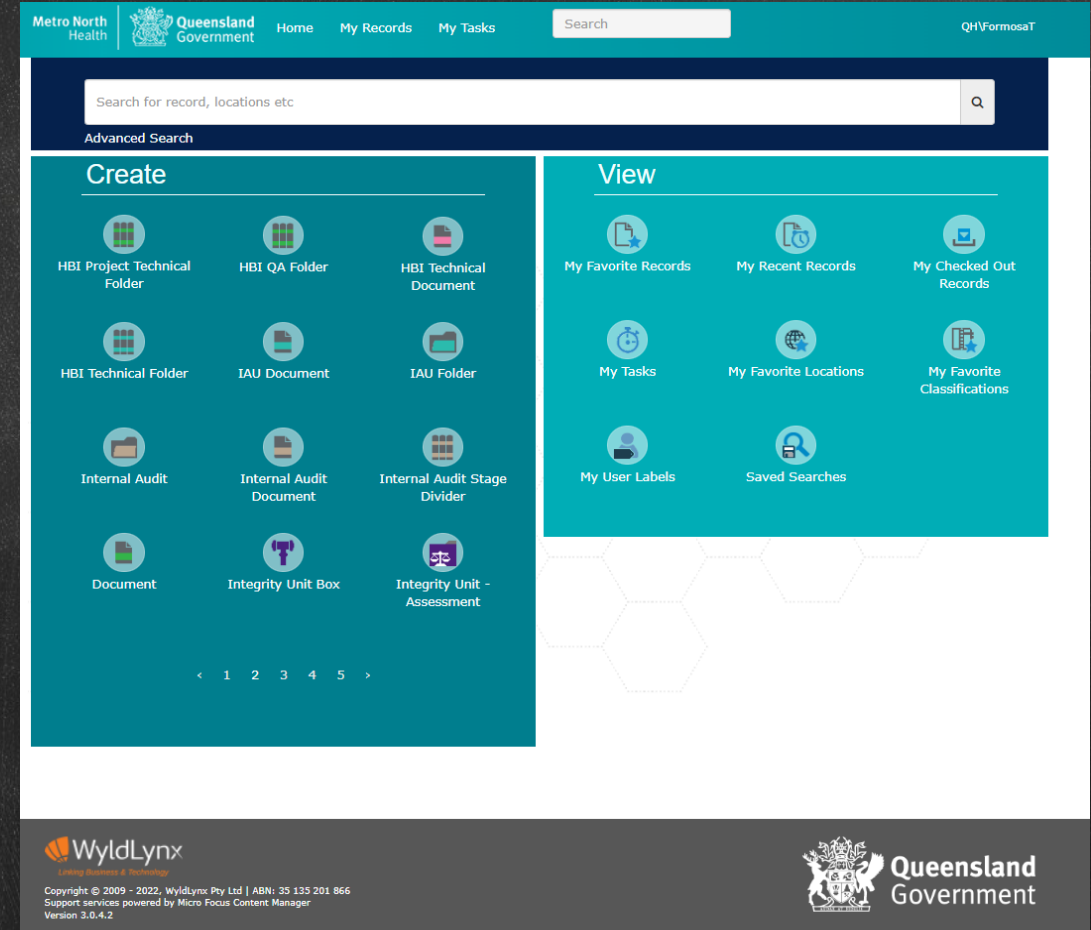


Action - IAU - Application		
General Action Steps Instructions		
Action Name		
IAU - Application		
Days	Hours	Minutes
18	0	0

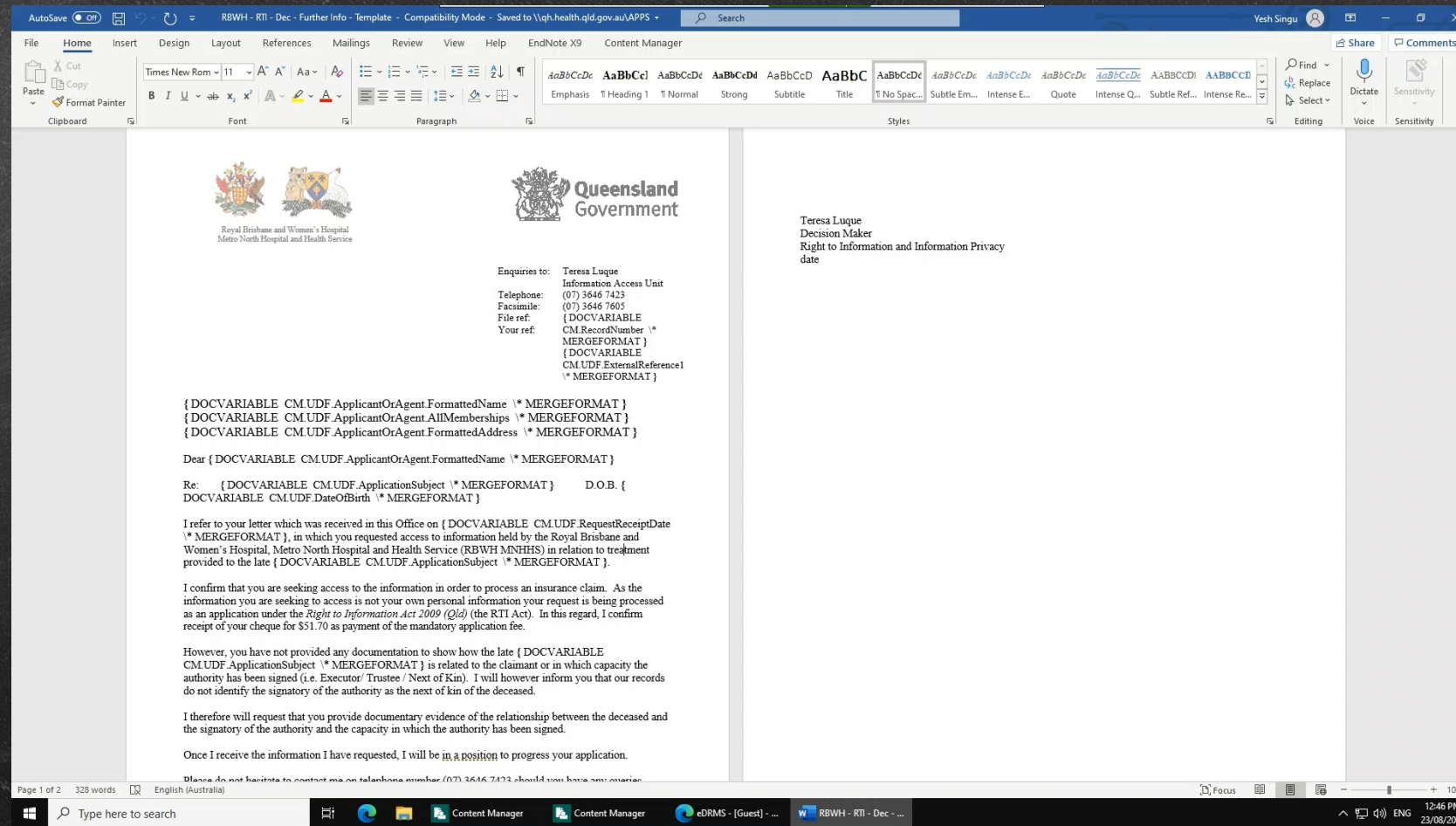
Action - IAU - Application	
General Action Steps Instructions	
✓	Based On Action
▶	IAU - Review and Assign Application
▶	IAU - Assess Application
▶	IAU - Collect Information and Update Application
▶	IAU - Scan Material
▶	IAU - Send Invoice
▶	IAU - Deliver Response and Close Application

Use Case: Information Access Unit

- Generating dynamic documents from templates created by super users
- Updates of metadata in existing applications and processing business processes.



Use Case: Information Access Unit



Use Case: Information Access Unit

Benefits

- Avoided multimillion-dollar procurement costs, with no additional capital investment. Alternative quotes were 14 times more expensive.
- Cut search time by more than 80%, from at least five minutes to under one minute, freeing staff for case work.
- Standardised case management across five facilities, replacing separate processes with one shared workflow.
- Consolidated two legacy databases and network-drive records into one repository, simplifying information access, management and reporting.

Use Case: The Digital Barista

Everyone wants answers

- Content Manager
- Policies and procedures
- Training videos
- Quick reference guides
- Business process documentation
- Support knowledge

Use Case: The Digital Barista

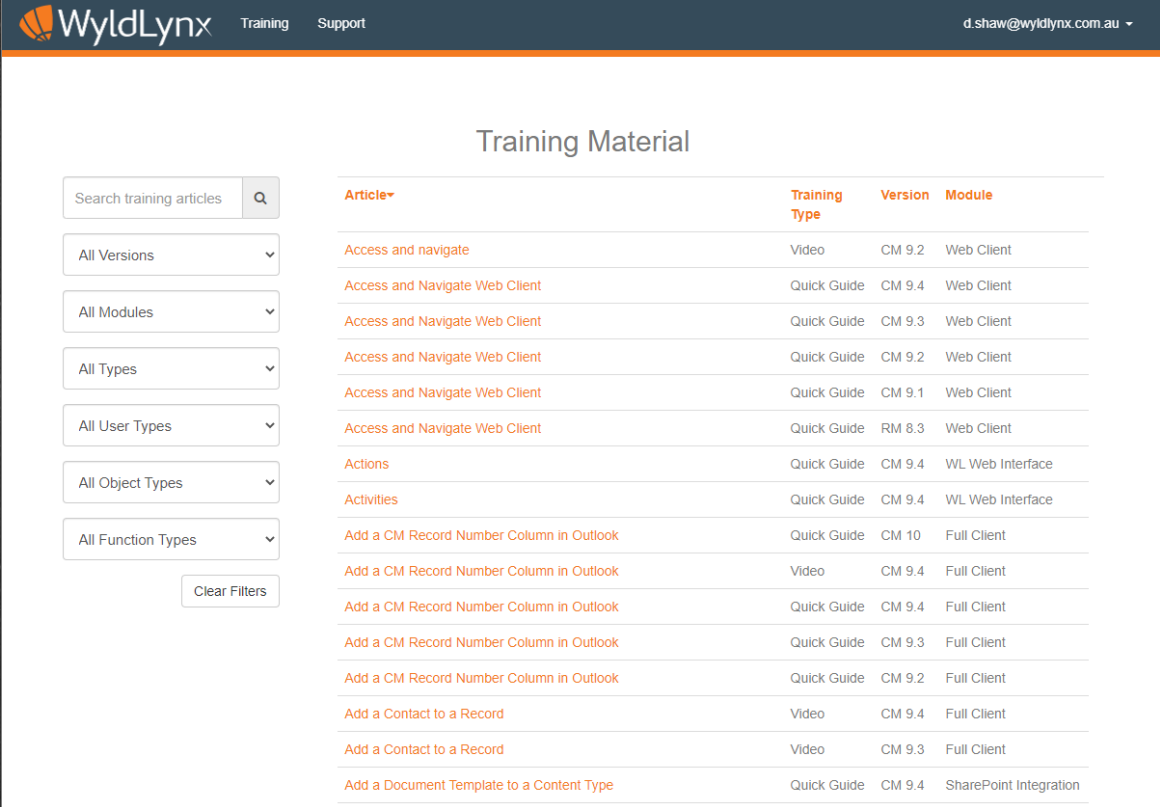
A trusted knowledge source employees can use to:

- Learn
- Search
- Resolve issues
- Follow business processes
- Find approved guidance

Don't just train your staff. Make expertise available when they need it.

WyldLynx Training Portal

- The Training Portal offers the below benefits:
- Content Manager guides, videos, manuals, tech notes, Dataport, SharePoint integration, Fusion, etc.
- Reduce Support Overhead - use the Training Portal as a way to get users to self-serve
- Ever expanding content – if we don't have it and you need it, we will create it
- Branded – so it looks like your organisation created it with a theme, logo and styles
- Ability to report on users interests and provide target training to them in the future
- Content upgrades are included so no more worrying when your organisation upgrades – we already have lots of content for CM Version
- SaaS based costing – pick 1, 10 or 5000 users based on your organisational need



The screenshot displays the WyldLynx Training Portal interface. At the top, the WyldLynx logo is on the left, and navigation links for 'Training' and 'Support' are in the center. The user email 'd.shaw@wyldlynx.com.au' is on the right. Below the header, the page is titled 'Training Material'. On the left side, there is a search bar labeled 'Search training articles' with a magnifying glass icon. Below the search bar are six filter dropdown menus: 'All Versions', 'All Modules', 'All Types', 'All User Types', 'All Object Types', and 'All Function Types'. A 'Clear Filters' button is located at the bottom of the filter section. The main content area is a table with the following columns: 'Article', 'Training Type', 'Version', and 'Module'. The table lists various training materials, including 'Access and navigate', 'Access and Navigate Web Client', 'Actions', 'Activities', and 'Add a CM Record Number Column in Outlook', among others. Each row specifies the training type (e.g., Video, Quick Guide), the version (e.g., CM 9.2, CM 9.4), and the module (e.g., Web Client, Full Client, WL Web Interface).

Article	Training Type	Version	Module
Access and navigate	Video	CM 9.2	Web Client
Access and Navigate Web Client	Quick Guide	CM 9.4	Web Client
Access and Navigate Web Client	Quick Guide	CM 9.3	Web Client
Access and Navigate Web Client	Quick Guide	CM 9.2	Web Client
Access and Navigate Web Client	Quick Guide	CM 9.1	Web Client
Access and Navigate Web Client	Quick Guide	RM 8.3	Web Client
Actions	Quick Guide	CM 9.4	WL Web Interface
Activities	Quick Guide	CM 9.4	WL Web Interface
Add a CM Record Number Column in Outlook	Quick Guide	CM 10	Full Client
Add a CM Record Number Column in Outlook	Video	CM 9.4	Full Client
Add a CM Record Number Column in Outlook	Quick Guide	CM 9.4	Full Client
Add a CM Record Number Column in Outlook	Quick Guide	CM 9.3	Full Client
Add a CM Record Number Column in Outlook	Quick Guide	CM 9.2	Full Client
Add a Contact to a Record	Video	CM 9.4	Full Client
Add a Contact to a Record	Video	CM 9.3	Full Client
Add a Document Template to a Content Type	Quick Guide	CM 9.4	SharePoint Integration

WyldLynx Training Portal

 Training Support

c.duncan@wyldlynx.com.au ▾

Training Material

quick tips

Q

All Versions ▾

All Modules ▾

All Types ▾

All User Types ▾

All Object Types ▾

All Function Types ▾

Clear Filters

Article ▾

Quick Tips and Shortcuts Guide

Quick Tips and Shortcuts Guide

Quick Tips and Shortcuts Guide

 Training Support

c.duncan@wyldlynx.com.au ▾

Return to Training list

CM 23 Full Client - Quick Tips and Shortcuts Guide

Accessing Content Manager

Micro Focus Content Manager is available in a variety of "client" applications and it is important to know which application your business is using to ensure you access the correct Content Manager client.

The types of "client" applications are:



Full Client, which is predominately used by administrators. However, users can get advantages by using this client with regards to accessing multiple windows.



Desktop Client is the basic thick client for users who are starting off using Content Manager. It has all the functionality of the Full Client excluding the multiple windows options.

Web Client is the web version of Content Manager which is a responsive design that allows users to access Content Manager on any device, anywhere and anytime

Record Types

Record types are the basic building blocks or templates for your records. Different record types have different record type behaviours.



Document: Contains individual documents



Folder: Folder Record Types contain Document Record Types



Series: This Record Type is used to link records with disparate metadata

 **WyldLynx**
We take your Business *personally*

WyldLynx Training Portal



c.duncan@cqu.edu.au Log off

WELCOME TO THE TRAINING PORTAL

Recently added training material



Training

carl.duncan@health.qld.gov.au ▼[Search training articles](#)[All Versions](#)

All Modules

All Types

All User Types

All Object Types

All Function Types

Clear Filt

Welcome to the WyldLynx training as
your first step towards learning more a

Our training resources have been designed to help you learn more about the material types;

- Quick Guide – short and easy to use
- Videos – short videos on functions
- Manuals – comprehensive manuals for each function

Enjoy utilising the resources on our site
support@wyldlynx.com.au

Regards,
The WyldLynx Team
www.wyldlynx.com.au

Welcome to the eDRMS Training Portal. You will find:

- Quick Guide – short and easy to understand “how to’s” with steps and pictures
- Videos – short videos on functions with Content Manager
- Manuals – comprehensive manuals on all aspects of Content Manager

If you are an existing RecFind user, please refer to the [DoH eDRMS Information Sheets](#), in particular 'Information for existing RecFind users' to assist with your transition from RecFind to eDRMS. In there, users will find some helpful documents to get you started.

Enjoy using the eDRMS Training Portal. If you have any questions, concerns, or suggestions, please contact records-corporate@health.qld.gov.au with your enquiry.

Regards,
Corporate Information Management

[View All Training Resources](#)

Recently added training material

CM 10 - Bulk Changes to Locations (Quick Guide)

CM 9.4 - Bulk Changes to Locations (Quick Guide)

CM 10 - User Options - Outlook Integration (Quick Guide)

CM 10 - User Options - Display Favourite Record Types First (Quick Guide)

CM 10 - Copy Security (Quick Guide)

Helpful training material for new users

- Create a new Record
- Apply a Security Level to a Record
- Create a new location
- Drag and Drop



WyldLynx Training Portal

The Training Portal gathers statistics behind the scenes on;

- How users access the portal
- What material is viewed
- Number of times content is viewed
- New Users in the portal

Provide targeted training based on what users are looking for not what you think!

WyldLynx Training Portal

[Training](#)[Support](#)

[Training](#)[Support](#)

c.duncan@wyldlynx.com.au

Reports

Select Company:

☒ Cumulative - Or -

Mar

2021

Active Users

New Users

Material Views

Total Active Users: 295

Material Views: 2200

New Users: 43

Active New Users: 6

UserName	
	3
	1
	1
	2
	0
	0

Reports

Select Company:

☒ Cumulative - Or -

Mar

2021

Active Users

New Users

Material Views

Training Type	Count
Quick Guide	371
Manual	11
Video	133
Tech Note	6

Product Module	Count
Full Client	409
Web Client	84
SharePoint Integration	12
WL Web Interface	3
ControlPoint	5
DataPort	8
All	2

Product Version	Count
RM 8.3	74
CM 9.1	13
CM 9.2	218
CM 9.4	207
CM 9.3	2
CP 5.8	5
All	2

Title	Training Type	Product Module	Product Version No	Count
Create a New Record	Quick Guide	Web Client	CM 9.2	159
Access and navigate	Video	Web Client	CM 9.2	145
Access and Navigate Web Client	Quick Guide	Web Client	CM 9.2	65
Drag and Drop	Quick Guide	Full Client	CM 9.2	53
Create a New Location	Quick Guide	Full Client	CM 9.2	49



We take your Business Personally

Sweet Treat:

*Sweet Treat:
Optimising for AI*

We want AI..... But don't know what you want to do with it

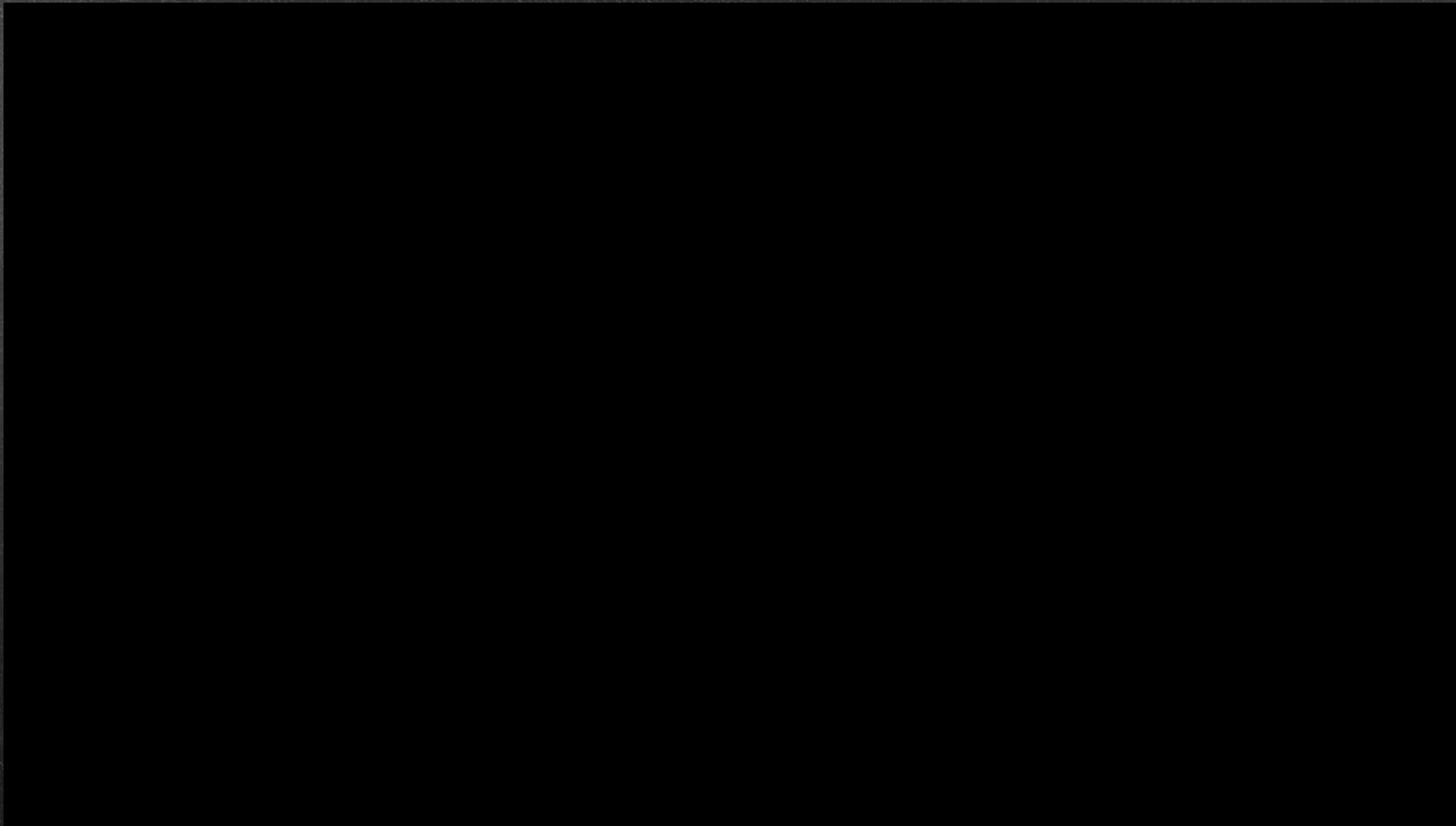
We often hear

- "We want AI across all of our information."
- "We want an AI search tool."
- "We want a chatbot over our information."
- "We want to connect Copilot to Content Manager."

What we ask next

- Who should access the information?
- Which information?
- What business problem are we solving?
- What action should happen after the answer?
- Should all records be included?
- What happens when information changes?

Use Case – AI on Ungoverned Information



Use Case: Large Government



Information Manager

We want Copilot connected to Content Manager?

All of it, are you sure?? This integration and 3rd party vendor is going to see ALL your HR files, Contracts, Legal, everything??

What is the business problem we are trying to solve?



Trusted Advisor at WyldLynx

Use Case: Large Government



Information Manager

Hmmmmm maybe, let me check..

All of it, all 18 million records... are you sure?? This integration and 3rd party vendor is going to see ALL your HR files, Contracts, Legal, everything??

What is the business problem we are trying to solve?



Trusted Advisor at WyldLynx

**A FEW
MOMENTS LATER**



Use Case: Large Government



Information Manager

Ok, maybe not all..

Hmmmm what got signed off in the brief by the CEO for scope??

Crickets

Ok why don't we start with policies, procedures and work instructions – about 50,000 documents



Trusted Advisor at WyldLynx

Summary

- Project Team didn't have clear scope
- IM Team (system owner for CM) wasn't involved (only by WyldLynx)
- Vendor who said they were an expert and could integrate to CM (couldn't) we ended up doing all the coding for them
- Security wasn't even thought of as files were getting moved outside of the secure system.
- Files were synced daily, but changed regularly.

Use Case: Many Clients

- Using Content Systems as a trusted AI Source
- Semi structured and more regulated information
- Tools on top of these systems to help;
 - Search easier – show me all the files related to WyldLynx
 - Summarisation – summarise these briefs or documents
 - Creation - create a brief in folder xxx on xxx topic

These systems still need to be considered for data privacy issues eg cleansing data before using AI on them..

Use Case: WyldLynx AI Journey

- We discussed the topic internally and started to review if we were to venture down this path what would we want to do and not do?
- We set off to build a Model Context Protocol (MCP) on top of CM to help talk to our AI Tools (Claude, CoPilot etc)
- Some of the principles we had:
 - Must use modern authentication (OpenID – Microsoft Logins)
 - Must secure the information within CM (not extraction)
 - Must be using the logged in users security in CM (no integration account seeing everything) - eg not bypassing security etc
 - CM Security by default and always

Use Case: WyldLynx AI Journey

Future - Making AI the productivity tool Content Manager needs:

- Building specific use cases for our business such as:
 - Policies – understanding our policies, providing users differences between them (reviewing revisions) and summaries
 - Support Tickets – utilising our vast information on previous tickets to assist our delivery for clients
 - Training Material – utilising our curated content from our team to provide better services or products to our clients
- Building this to meet the needs of our clients in every unique way they see it helping their business (as they are all different just like us)

Secret Takeaway Menu

Secret Takeaway Menu

- Discovery is for everybody - understand what you have before you go looking for more...
- Make compliance the easy order – let people save documents and work normal with governance happening in the background
- Serve collaboration with governance on the side – let people use M365 provided you are governing or managing their content

Secret Takeaway Menu

- Order what your business needs – not all “cafes” have a 5-star review and just want to “fill you up” with their junk food
- Give AI a tasting plate before the whole buffet – start with a subset of information and a clear business problem to solve

Talk to the Chef's & Grab a Coffee

- If you have data privacy issue and don't know where to start?
- If you have Content Manager and not getting value?
- If you want to manage content in M365?
- If you want to discuss AI and Content Manager

Come talk to our team of Chef's at booth 14 😊

Thank You