



# Summary of changes to RecFind 6

Versions 2.4 to 2.10

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# CHANGES 2.4 TO 2.5

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## New Products

- A web services SDK is now available. For more information please contact [sales@knowledgeonecorp.com](mailto:sales@knowledgeonecorp.com) or see our web site.

## All Products

- Implemented password authentication against Active Directory as an option. This feature is enabled in the DRM and affects all products.

## RecFind 6 Server & Client

*Note: client changes apply to both the smart-client and the web-client unless noted.*

- In workflows you now have the option of adding a “Stop” action in a workflow process. This allows a workflow to cease from a decision without a user completing the task.
- Corrected file numbering issue when cloning for certain number formats.
- Drop-down lists will now sort on ExternalID followed by any custom user sorts.
- If a user doesn't have access to the EDOC table, they will no longer see the “Attachment” text search option
- A custom warning message can cause the same auto-number sequence number assigned to two records. Auto-numbers are now only assigned to a record after any warning messages are processed.
- Added ‘system variables’ to the Boolean Search functionality to allow “Today's Date” or date calculations based off “Today's Date”. This allows searches on “Current Month”, “Previous Month”, etc.
- EDOCs can now be added to Workflow through the To Do list

## **Button**

- Added support for 64bit versions of Microsoft Office, which entailed upgrading add-ins to “VSTO 2010 add-ins”

## **DRM**

- Added options for enabling password authentication against active directory
- Provided new session timeout options

## **Web Client / Mini-API specific**

- A configuration option is now available in the web.config file to set the number of records that will load in to a drop-down.

## **GEM**

- Added the ability to search rules for text
- Altered the matching algorithm for word comparisons. It will now look for a whole word unless the search word is specified with wildcards.

## **RecScan**

- RecScan will use the appropriate auto-number format options if the EDOC table is type-dependant.

## **Merge Utility**

*Note: The Merge Utility is part of the server installation*

- Made performance improvements

# CHANGES 2.5 TO 2.6

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## All Products

- All products were tested and certified against the latest versions of operating systems (e.g. Windows 2012/R2, Windows 8.1).

SQL Server 2012 was also tested against and is now fully supported.

## RecFind 6 Server & Client

*Note: client changes apply to both the smart-client and the web-client unless noted.*

- When scanning, the PDF conversion and/or OCR process will now be performed on the application server by the RecFind 6 Thumbnail Creation Service.

Microsoft Office Document Imaging (MODI) is required by this service to perform the OCR functions. You therefore need to install the MODI component on your RecFind application server.

MODI is part of Microsoft Office (up to 2007), otherwise can be installed as part of Microsoft SharePoint Designer.

Please refer to the Errata in this document for more information.

- Added the ability to create PDF files in PDF/A format when scanning to meet the latest compliance standards.
- When scanning to PDF or PDF/A, OCR'ing the document is now optional.
- New Report Writer with new document CrossSectionLine and CrossSectionBox controls.
- Reports now allow sub-reports to appear with-in sub-reports.
- When running the report, a new user interface reduces the number of steps required to select your template and produce your reports.

- EDOC records now contain a Status, which can be Draft, Published or Destroyed.

A status of Published provides the same functionality as previous releases.

A status of Draft will allow users to edit the electronic document stored within RecFind 6 without needing to check it out first.

Finally, the status of Destroyed will remove the electronic document from RecFind 6 however the record/metadata will remain in the system.

- When moving Archive Boxes currently stored in a Space, you now have the option of keeping the space allocated. If selected, when next moving the box its previous Space location will be automatically populated. Boxes now also show an Allocated Space field.

## **Button**

- Added support for Adobe Acrobat Professional XI.
- The various scanning changes made to the RecFind 6 Client also apply to the Button (i.e. background OCR processing, PDF/A support and optional OCR).

## **DRM**

- When scheduling automatic reports, you now have the option to deliver the reports on working days only. You also have the option of not sending any report if the report contains no data.
- We have introduced a new Administrator level. Existing Administrator access is now known as a “Super Administrator” and continues to have full administrative rights to the system within the DRM.

A new “RecFind Administrator” option allows users to be provided access to the DRM but be limited to only have to access to selected menu items. There are also options to allow access to certain areas but not be able to delete any information.

Administrators defined as “RecFind Administrators” will also be restricted to only have access Security Groups and Security Codes based on their security rights.

- From the Field Configuration screen, you can now define which security groups have access to the field, as opposed to having to go through the Security Group functions.
- You can now configure fields to be read-only by security group, allowing some users to have modify rights to a field while others can only read the value.

## **Web Client / Mini-API specific**

- Users with Microsoft Internet Explorer can now scan documents from their local TWAIN compliant document scanner.

Documents can be stored in a variety of formats including TIFF, PDF and PDF/A.

When PDF or PDF/A is selected you have the option of OCR'ing the document, which will be performed by the RecFind 6 Application Server as a background task.

When scanning documents, you can also redact information to selectively obscure sensitive information.

Note: In the future other web browsers (e.g. Chrome, Firefox) will be supported.

- The toolbar is now narrower for a better fit on mobile devices. The icon description now appears below the icon rather than beside it.

The ‘Change Password’ and Help options are also now relocated to be more accessible on mobile devices.

- Sites licenced with the Mini-API can now publish links to your RecFind 6 records and not require users to enter a username and password to gain access.

This is achieved by defining which security code(s) are considered public and configuring which user account is to be used when accessing public records. This configuration is done via the DRM.

- Mini-API links can now be configured to allow a user to modify the record that they are linked to. Ideal for workflows where an infrequent user needs to be able to mark a record as approved.
- When viewing electronic documents in the web client the “split-screen” view now provides more functionality when viewing PDFs and images.

Also, when using an Apple iOS device, MSG files will be converted to HTML and be able to be viewed without using Microsoft Outlook.

## **GEM**

- Added performance improvements to the GEM Agent.



# CHANGES 2.6 TO 2.7

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## All Products

- All products were tested and certified against the latest versions of operating systems (e.g. Windows 2012/R2, Windows 10).
- SQL Server 2014 was also tested against and is now fully supported.
- Product functionality was also tested with Microsoft Office 2016 to ensure that it is compatible.
- All components were upgraded to utilise the Microsoft .NET Framework v4.5.

**Note:** This will require that all machines where RecFind 6 components are installed (i.e. servers and workstations) have Microsoft .NET Framework 4.5 installed.

As Microsoft .NET Framework 4.5 mandates particular operating systems (i.e., Windows 7 SP1, Windows 2008 SP2, Windows 2008 R2 SP1, Windows 2012) some operating systems such as Windows XP and Windows 2003 will no longer be able to run RecFind 6.

## RecFind 6 Server & Client

*Note: client changes apply to both the smart-client and the web-client unless noted.*

- Added support for oneilBridge functionality, a new add-on for RecFind 6 that allows a direct connection to your offsite storage provider. Currently only applicable to the smart-client.

Please contact [sales@knowledgeonecorp.com](mailto:sales@knowledgeonecorp.com) if you would like more information on purchasing this new facility.

- Added new severity level for custom Warning Messages to allow pre-save validation.
- Various minor bug fixes.

## **Button**

- Added support for Adobe Acrobat Professional DC.
- Removed support for Microsoft Office 2003, Lotus Notes and GroupWise.
- Various minor bug fixes.

## **RecFind 6 Mini-API**

- Improved handling of the ImageOnly parameter so only one browser window is opened when viewing EDOC images.

## **DRM**

- Added web services URL field, required for oneilBridge functionality.
- Various minor bug fixes.

# CHANGES 2.7 TO 2.8

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## New Features & Major Changes

- Legal Holds

The Frozen Record functionality in previous versions has been replaced with a new Legal Hold system. This allows you to apply a “hold” against one or more Metadata Profile and/or EDOC records and manage them as a single “hold”.

When a hold is applied to a record, any linked Metadata Profiles or EDOCs are also automatically included in the hold. For example, applying a hold to a box record will also apply to any file folders and documents within the box, and then also to any EDOCs linked to those file folders and documents.

Records on a Legal Hold cannot be modified or deleted from the system, however, can still be moved and requested, permitting their location to continue to be tracked while subject to a Legal Hold.

- EDOC Retention

You can now assign retention codes to EDOC records and calculate destruction dates. On Retention Code records you can now assign a retention period and starting event to apply to EDOCs assigned with the code.

The appropriate retention functionality is also now available from the EDOC Pick List screen.

When an EDOC is marked as destroyed, the electronic document will be removed from the system and no longer be viewable.

EDOCs will also be automatically destroyed when the Metadata Profile record they are linked to is also destroyed.

- Multiple Security Groups per User

You can now assign a user multiple security groups. The access rights from all security groups assigned to the user will be combined. This includes security codes, table & field access and application methods.

This change also means that each user will have their own “Nominated Security Code” instead of being set on the Security Group. This will be automatically transferred as part of the version upgrade.

- More functionality replicated to the web client

The Process method is now available in the web client. Processes of the 'stored procedure' type will now be available, where previously they were only available in the smart client.

The Barcode Reader and Barcode Movement modules are now available. These functions are identically to the smart-client.

- EDOC Bulk Check-out and Bulk Check-in

EDOC Bulk Check-out and Bulk Check-in is now available in the smart-client and in the web-client. The smart-client will prompt you for a folder to save documents, while the web-client will download a ZIP file.

- EDOC Export to Native Format

A new 'Export to Native Format' option is available when exporting EDOC records allowing you to export out the records in their native format (i.e. as PDF, TIF, DOCX, etc).

You are also prompted when exporting as CSV whether you'd like the records in their native format at the same time.

- MiniAPI allows the inclusion of the TypeID

The TypeID can now also be included in the link query string. This allows you to limit the results to a particular type and therefore avoid potentially getting multiple results if the same ExternalID is used in different types.

## Minor Changes

- When configuring a Security Group, the Security Code list is now sorted alphabetically
- The EDOC status Deleted is now called Destroyed for consistency with MetadataProfile retention
- In the DRM you are no longer prompted to save changes to all types when altering the Default type. This is to avoid inadvertently applying sorting and field visibility across all types. You will now need to purposely go to each type.
- When configuring types in the DRM, you can now clone an existing type.

- When configuring columns in the DRM the total percentage is now shown to assist ensuring that the column widths total 100%.
- You can now update an existing Saved Search by supplying the existing Saved Search name when saving. Previously this would duplicate a new Saved Search record and you would need to delete the old one.
- In the web client, you can include a custom logo (as an SVG file), which will be displayed on the background of the main screen. The file must be located at '\Images\Icons\svg\mylogo.svg' within the 'Web Client and Mini-API' folder.
- The Save As method on the EDOC table is now called Check Out

## **Bug Fixes**

- Corrected issue with Retention Codes that use “days” as their period.
- Fixed issue performing EDOC searches based on their Status (i.e. draft / published / deleted).
- Configuration changes made in the DRM will now appear for any users currently using the Button when you exit from the DRM. Previously users had to exit and log back in to see the changes.
- Improved memory management in the Button. Previously users may receive an Exception error message after checking in several documents and they had drop-down lists with a large number of records.

# CHANGES 2.8 TO 2.9

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## New Features & Major Changes

- Online Licencing & Activations

Licencing and activations are now completed online instead of via email.

You will now be able to licence, register and activate your RecFind 6 systems instantly without any intervention by Knowledgeone Corporation.

Your RecFind 6 system will also automatically check (once per day) for updated licence information and apply any changes if required (e.g. when you purchase extra users).

To use the new licencing system, you will need to know your customer number and the appropriate serial number for the system. Each system (i.e. production and test) has a unique serial number.

Your customer number and serial numbers will be supplied with your v2.9 download links, or also available by contacting [support@knowledgeonecorp.com](mailto:support@knowledgeonecorp.com).

There is also the ability to select your old licence files to determine your customer number and serial number.

- EDOC Archiving

To assist customers with large databases, you can now “archive” electronic documents to secondary SQL Server databases, therefore allowing you to reduce your backup requirements.

The end-user experience remains unchanged, archived EDOCs can still be searched upon and viewed as normal.

EDOC Archiving is an optional add-on component that must be licenced. Please contact [sales@knowledgeonecorp.com](mailto:sales@knowledgeonecorp.com) for purchasing information.

- Support for multiple systems on a single application server

Previously a separate application server was required for each system as the various RecFind 6 services would only process one system. Changes are introduced in this version that allow you to process all systems configured within a Connection Manager.

This only applies to the Retention, Scheduled Task and Thumbnail services. RecCapture and GEM remain as they are.

Please note that you can still not install two different versions of RecFind 6 on a single application server. You therefore still need two application servers when testing upgrades (i.e. for when you wish to use the old version in production while you test the new version in test). This option is more beneficial when you have multiple separate RecFind 6 systems.

- New session timeout

On the “Change Configuration Settings” screen on the DRM you can control how users are logged out of the system if they do not log themselves out.

A new session timeout option is now available called “When user logs on again”. This joins the existing session timeout options of “When licence is required” and “When user is inactive”.

The new “When user logs on again” session timeout will cause any session that the user has opened to be closed, therefore only ever allowing a user to only use a single licence for a particular product.

Users will still be able to log on to different products at the same time, for example have a client licence and a Button licence in use at the same time, however a user will not be able to have two client licences in use at the same time.

Please note that the web client and smart client use the same pool of licences, therefore a user will not be able to have a web client and a smart client licence in use at the same time.

- Automatic extraction of email properties from MSG file

When adding a MSG file to your RecFind 6 system, we will now automatically extract the recipient, sender and subject information and populate the appropriate fields in the EDOC record.

- Optional Complex passwords

When using the RecFind database as your password source (and not active directory) you can now force users to specify a “complex” password when changing their password.

The administrator is able to specify minimum password length, plus the minimum

number of lowercase, uppercase, numerical or symbols that users must include in their password.

## Minor Changes

- We have removed the requirement for Microsoft Office for spell checking.
- We no longer override the scanner's document source settings to force the use of the document feeder.

## Bug Fixes

*Note: customers experiencing these issues may have already received a hotfix to correct the issue in version 2.8.*

- [BUTTON] When checking in a checked-out document via a Microsoft Office application, the document may be added as a new document instead of a new version.
- [RECAPTURE] When copying a large number (1000+) of large sized documents (500+ kilobytes) to a monitored folder, RecCapture may error with the message "Too many changes at once".
- [RECSCAN] After completing an import with RecScan, it can attempt to re-run the import when you close the application.
- [ALL PRODUCTS] After deleting a field from the EDOC table you can get an error stating "Could not save the record. Invalid column name" when adding/modifying EDOC records.
- [WEB CLIENT] When uploading an EDOC via the web-client, the Published Date is set to the current date/time, unlike the Button and smart-client where the file's modified date is used. Made changes to retain the file's modified date during the upload of the file to the web server.
- [WEB CLIENT] When exporting records from the picklist in the web-client, you may not receive the prompt to open/save the CSV file. Only occurs when exporting a large amount of data and the system is slow to generate the CSV file.
- [ALL PRODUCTS] If you have added a decimal field to your MetadataProfile or EDOC table, you may receive an error "Error converting data type varchar to numeric." when adding/modifying records.



- [DRM] When a field is hidden on the (Default) type, it may incorrectly show in the list of fields on other types. The field is only shown on the DRM configuration screens, not in the client(s).
- [MERGE TOOL] After merging data and closing the merge tool, sessions were not closed properly, therefore using up a licence until the session times out.

# CHANGES 2.9 TO 2.10

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## System Requirement Changes

RecFind 6 v2.10 requires Microsoft .NET Framework 4.7.2 or higher.

All RecFind 6 installation programs will check for this version and will install it if it is not present (assuming it is supported by the operating system). The Microsoft .NET Framework 4.7.2 installer is embedded within the RecFind installation programs and no download will be required.

Please refer to the [Microsoft .NET Framework system requirements](#) to confirm that your operating system is supported. Certain builds of Windows do not support Microsoft .NET Framework 4.7.2, including Windows XP, Windows Vista SP2, Windows 8 and Windows 10 builds 1511 and 1507.

We have also removed the following products from our list of supported environments:

- Microsoft SQL Server 2008/R2
- Microsoft Windows Server 2008
- Microsoft Windows XP
- Microsoft Office 2010

These were removed due to their support lifecycle and/or incompatibility with other components.

## New Features & Enhancements

- TLS 1.2 Support

You may now disable TLS 1.0 and 1.1 protocols and it will not affect any RecFind 6 component.

- Added support for Microsoft SQL Server “Always On”

Customers can now use Microsoft SQL Server “Always On” feature and it will not cause problems with our licence activation system upon failover.

For sites using Always On, after upgrading you can use the Availability Group name as your Database Server Name instead of using the active server’s name.

You will need to re-activate the system using the DRM after making this change.

- New SDK Licencing system implemented.

All sites using the SDK will now be allowed to have up to 50 concurrent users logged in to the SDK, instead of sharing the users with your RecFind 6 licence pool.

For additional users, please contact Knowledgeone Corporation.

- New Retention starting events – Records From Date and Records To Date.

When creating retention codes you can now select your retention calculation to be calculated from the Records From Date and Records To Date fields on the record.

- Support for latest operating systems, database products and office applications. Includes support for:

- Microsoft SQL Server 2017
- Windows Server 2019
- Adobe Acrobat Professional 2017

- Bulk Check-in Retains previous settings

Any settings entered when performing a Bulk Check-in will be remembered. The next time you use the function, the form will be pre-filled with the settings you used the last time.

- Smart client introduces a new spell-checker, removing the need for Microsoft Office. This is a fully featured spell-checker with the ability to include or ignore uppercase words, add words to a custom dictionary, etc.

## Bug Fixes

*Note: customers experiencing these issues may have already received a hotfix to correct the issue in version 2.9.*

- [BUTTON] When checking in an email with BCC details, the BCC address was appended on to the Subject field instead of getting placed in the BCC field.
- [DRM] When the AD sync function created users, no default Security Groups were assigned.
- [SETUPS] If you are using a proxy server for internet access, you will no longer need to manually update the configuration files. This will be done automatically.

- [CLIENT / WEB CLIENT] When using the bulk check-in feature, the system will now enforce mandatory fields based on the type you select.
- [DRM] Scheduled Tasks will now better handle emails scheduled to People without a workemail address.
- [GEM] Updated the component that saves the emails as MSG, which corrects a rare issue where spaces between some words can be removed from emails.
- [CLIENT / WEB CLIENT] Corrected an issue where you may receive an error deleting an EDOC. The error was “ExecuteReader requires the command to have a transaction when the connection assigned to the command is in a pending local transaction.”
- [WEB CLIENT] When performing a bulk check-in, files with-in subfolders are now included.
- [CLIENT / WEB CLIENT] When performing a bulk check-in, hidden files will not be included.