

# **REC FIND**

## **VERSION 5.0.0G**

### **SERVICE PACK 3**

### **RELEASE NOTES**

#### *INTRODUCTION*

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Service packs add improvements and provide fixes to problems discovered by Knowledgeone Corporation and our customers. Note that the symptoms (problems) described below may not be experienced by your site. Many of these symptoms are due to a unique set of circumstances that your site may not experience. Not all of the 'fixes' are because of faults in the RecFind code; many are 'work-arounds' for problems found in network, operating system or database products used by RecFind but not supplied by Knowledgeone Corporation.

The service pack accompanying these release notes provide corrections and improvements for RecFind Version 5.0.0G and on completion will upgrade your installation to RecFind Version 5.0.0I.

## *APPLIES TO*

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This service pack applies to customers who have the following products installed:

- RecFind Corporate/RecFind Professional/RecQuery/ RecQuery TC/RecFind Button version 5.0.0G.

Customers currently using RecFind 5.0.0F or earlier must upgrade to RecFind 5.0.0G prior to applying this service pack.

Note: this service pack contains the same fixes found in service pack 1 and service pack 2 for RecFind 5.0.0G.

## *INSTALLATION*

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*NOTE! In order for the service pack to update the RecFind application files, please ensure that there are no users running RecFind prior to installing the service pack.*

To install the service packs, double-click the service pack file that you have downloaded (ie. '**RF500G3.EXE**'). This file will self-extract and load the installation program. When prompted, select the directory where RecFind is installed, and click 'Continue'.

Repeat this process on any local installations of RecFind that you have.

Please note that the RecQuery TC service pack must be installed using the IIS web server. Prior to installing the service pack the IIS services must be stopped and then restarted after installation.

## RETENTION FIX UTILITY

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One of the issues addressed by this service pack is that incorrect information is shown on a Retention Code report. This issue was caused by a problem when the data was initially saved to the database.

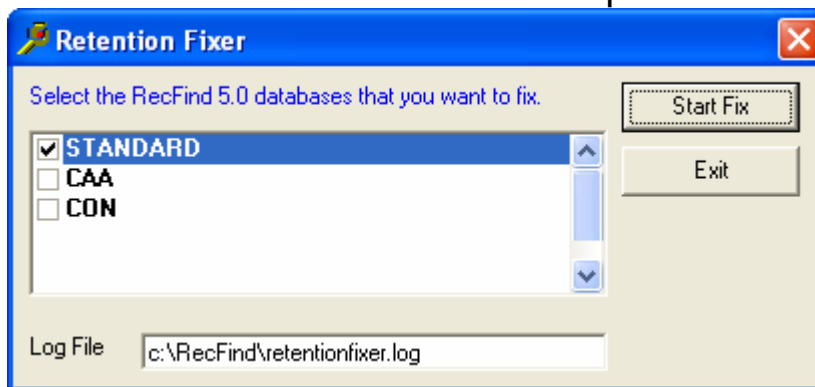
To repair the database a RetentionFix.exe utility is installed in to the RecFind application directory during the installation of the RecFind service pack.

Running this utility is optional – however existing retention data will still be shown incorrectly on a retention code report.

Note: a backup should be taken before making any batch database updates. Please only proceed once you have ensured that a backup is available.

To repair your database,

1. run the RetentionFix.exe program from the RecFind application directory
2. when prompted enter the username and password for a Recfind administrative account
3. Select the databases to repair, set the log location and click 'Start Fix'. See below for an example:



4. A progress window is shown as it updates the database.
5. On completion, click OK to the success message.
6. Check the log for any errors.

## *NEW FEATURES & CHANGES*

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This service pack includes the following changes:

### RecFind

- When creating a new file, manual changes to the sequence were overwritten with the next number. Users can now overwrite sequences which was permitted in previous versions. [F1125]
- When creating a new file, if your file number format contained a series of '\*' in the mask, the file number sequence would appear twice. [F1126]
- When exporting files, files located in a box would have a current location of REGISTRY causing the incorrect Now At information to be displayed when re-imported. [F1122]
- Corrected spelling error in message box that appears when trying to archive a frozen record. [F1123]
- Added new option to File Movements to avoid the prompt for retention code changes. This assists when making large batches of movements with a barcode reader. [ENH]
- When printing extended metadata only one line of the unlimited text field was printed. All text is now printed. [F1051]
- When posting portable barcode movements, records with a trap reason now also show movement details on the report. [F1061]
- When destroying records via the retention module, altered warning text from "marking records as deleted" to "marking records as deleted" to avoid confusion [F1077]
- Document maintenance will now automatically highlight the file number field to allow you to manually type in the number without first removing the existing value. [F1078]
- Corrected issue with retention codes where the report shows incorrect calculation method [F1079]
- When moving multiple boxes, the space number for boxes is now retained unless a new space number is specified [F1081]
- Corrected spelling error on message box that appears when modifying an action officer [F1088]
- Now allow the printer tray to be selected when printing action sheets. [F1089]

- Added the ability to perform Box Movements via the Import/Export Utility when performing a “Modify only” import [F1100]
- Corrected issue where a Purge wouldn’t clear the link to the file from the box contents. [F1103]
- Added validation to the Change File/Part Number function to ensure a non-numeric part number or spaces can not be specified. [F1104][F1071]
- Returned the margin sizes for 2” with barcode label format to previous size [F1105]
- Corrected issue for the File Filter table when SQL databases are set to be case sensitive. [F1109]
- In reporting and writer, the reply status of sent now correctly returns records [F1110]
- In box maintenance, you clicked Delete without first selecting a box, the profile for a different box would be displayed. [F1112]
- Corrected issue where movements made with the portable barcode reader may be incorrectly processed to occur in the future. [F1113]
- You can now view a ZIP archive file via Search module (previously only possible via Document Maintenance) [F1114]
- When destroying a file via File Maintenance (ie. changing the disposition to ‘closed’) the archive/destroy date is now automatically completed. [F1115]
- Synchronise function will now apply retention codes the same way as file maintenance (ie. the one that gives the longest rather than the one assigned to title line 1). [F1117]
- You can now search for Audit Trail entries logged by user IDs that are longer than 10 characters. [F1118]
- When making a box movement with a fixed barcode reader, the movement will be now processed once the barcode is scanned without need to click OK. [F1119]

### RecQuery

- Includes all search module changes made in RecFind, see above.

### RecQueryTC

- Added support for different IIS application options so RecQueryTC can run in non-default memory space [F1106]
- Improved attached document search options to search on full words, not just characters. [F1108]

- Corrected issue where security was not applied to box text search results. [F1111]
- The “Now at” location was not displayed for boxes that are destroyed. [F1075]

### Button

- When adding a document the record may not be indexed and therefore unable to be located using a document text search. [F1086]
- When adding a document the folio number is blank, this causes document maintenance to allocate a folio number of “1” when next modified. [F1121]
- When adding a document the internal document number was not padded with zeros causing the attached document list to be sorted incorrectly. [rel F1011]
- When selecting a Document profile or File profile, in addition to a number search you now have the ability to locate records using a Text or Phrase search. [ENH]
- Corrected issue when installing the button on the Microsoft Outlook 2007 toolbar [F1120]
- Increased the permitted file name length, previously only allowed 150 characters [F1091]
- When a user without an associated action officer uses the button, the document is not assigned a security code. It now defaults to the lowest security code. [F1085]
- Made alterations to the temporary file name given to Outlook messages to reduce the likelihood of receiving a duplicate attachment name. [F1053]
- No folio number is assigned when adding a document via the button. [F1121]

## GETTING HELP

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Should you experience difficulties during the upgrade, please contact our International Support Center by:

Email: support@knowledgeonecorp.com

Phone: 1888 325 1614 (United States toll free)  
1800 221 061 (\*Australia toll free)  
1888 405 9019 (Canada toll free)  
0800 445 438 (New Zealand toll free)  
0808 234 8828 (UK toll free)

\* Please note, the Australian toll free number excludes Sydney customers. Sydney customers please phone 8913 9300.

To speed the technical support process, please have ready the following information before contacting the International Support Center:

- Customer Number
- Incident PIN Number (If you have purchased support 'Incidents')
- Product Version
- Type of Database Server (Oracle/MSSQL Server) and Version

### **Web Site**

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