RecFind 6

Version 2.1

Service Pack Release Notes

30th April 2009

Knowledgeone corporation

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Every effort has been made to ensure that the information in this document is up to date and accurate. Knowledgeone Corporation welcomes advice of any changes or corrections for the next edition.

INTRODUCTION

Service packs add improvements and provide fixes to problems discovered by Knowledgeone Corporation and our customers.

The symptoms (problems) described below may not be experienced by your site. These symptoms can be 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; there can be 'work-arounds' for problems found in network, operating system or database products used by RecFind 6 but not supplied by Knowledgeone Corporation.

The service pack accompanying these release notes provide corrections and improvements for RecFind 6 Version 2.0 and on completion will upgrade your installation to RecFind 6 Version 2.1.

CHANGES

RecFind 6 Server & Client

- If a user didn't have access to either the Task or Request table, the To Do list wasn’t available from the Toolbar buttons. A correction was made that if they only have access to one of these tables that the To Do list will be available and just the applicable list will be shown. [F1198]

- The Action Officer drop-down list in the To Do screen was showing all person records instead of filtering by the security group of the logged in user. [F1195]

- When performing a text search, a user could receive the error: Invalid object name '#tbTemp1'. This happened when the word you were searching for is contained in over a thousand title records. [F1204]

- If a File Folder had its status changed to “Closed” and a close date was not specified by the user, no retention calculation occurred if they had a retention schedule based off closed dates.[F1206]

- There was also a problem with using date last attached to in retention schedules. It wouldn’t calculate it the first time the record was saved, but only on successive saves.

- There was an issue with licensing and web services where licensing was trying to validate information regarding the web server through LAN calls. [F1209]

- When connecting via Web Services the "Please wait while the server initialises global objects. This may take a few minutes..." can disappear for a while before the login screen appears, and is particularly noticeable on slow connections. A progress bar message now remains until the login screen appears. [F1208]

- The OCR process was not waiting to finish before returning to the Add EDOC screen. Now waits and shows a progress bar.

- Problem saving reports with apostrophes in the name.

- Space bar now selects a result from the text search so that the user doesn't have to use the mouse.

- There was a problem opening files with illegal characters in the file name. These improper file names could end up in the EDOC table during the conversion process from RecFind 5. [F1210]

- A link table called "LinkToDoPeople" can now be used to configure the To Do lists that a user can see.

Button

- Fixed a problem with a certain sequence of events on the sort screen on check out. If there is only one column being sorted on, and the user ticks the sort descending tick box and then unselects that column to sort on, an error would occur.

- The check out window will now close after checking out a document.

- Changes were implemented in the Lotus Note integration to automatically populate the Sender, Subject and Recipient metadata using details available from the message you are registering.

DRM

- The DRM would lose its locked session if no activity would occur for approximately 5 minutes after login. [F1196]

- If a table is type dependent, turning off the "access?" method for the default type doesn't untick the method for all types despite that is effectively what it does. Now unselects all type if default unselected. [F1197]

- If the ReceiveSolicitations field is hidden on the UserProfile table, when adding a new UserProfile record you'd receive the error "Could not save record. This is a mandatory link designated by the system". You are now not allowed to hide fields which are system mandatory without first supplying an autofill. [F1199]

- When you create a new LinkTable, the stored procedures were not properly created. If you modified it, the stored procedures would be created properly. This has been fixed. [F1202]

- The default filter name was incorrect when applying filter on FieldLinks (it was using the name of the field not the field link).

- Better error handling has been added for when the DRM loses its connection to the database server.

Xchange

- When importing tables with circular references (for instance tables like person and entity where person has an EntityID field and the Entity table has an AccountManagerPersonID), Xchange would fail to import properly if you tried to import to both tables in the same import and establish links between the records.

- If the log file comes up during an import, it always tries to bring it up in subsequent imports, even if the subsequent imports have no errors.

- Some of the links aren't properly established when reloading a saved import.

Conversion Utility

- When converting Titles from RecFind 5, the ParentTitle of Titles can become linked to Title records of a different type. It occurs when the term exists in more than one type. [F1201]

- If a Title value is used by more than one parent title, when the conversion converts MDPs and assigns the Title ID it can use the incorrect Title – it should find the title with the relevant Parent. [F1191]

- The conversion can fail if it finds a RecFind v5 record with an invalid security code. [F1205]

INSTALLATION

The service packs are provided to update existing installations of RecFind 6. If you have not installed a component, you must first install it from the RecFind 6 CD-ROM and then apply the appropriate service pack.

As the various components of RecFind 6 can be installed in a variety of locations, a service pack is provided for each of the RecFind 6 components.

Your site may not be licensed for all of the products for which there are updates. Only those which you are licensed for should be downloaded and applied.

This service pack includes updates for the following components:

- RecFind 6 Server
- RecFind 6 Client
- RecFind 6 DRM (Administrator tool)
- RecFind 6 Button *
- RecFind 6 RecScan *
- RecFind 6 Conversion Utility
- RecFind 6 XChange (Import/Export Utility)

* = add-on products requiring specific licences. All other products are standard modules provided with RecFind 6.

All relevant components should be patched at the same time (ie. do not only install the client patch and leave the server unpatched).

Before you start

As with any application update, a backup of your existing application and database should be taken prior to running any service pack installation.

RecFind 6 backups can be performed using the DRM or using Microsoft SQL Server Management Studio.

Installation Process

RecFind 6 Server

The first component to update is the RecFind 6 Server.

You will need to install RecFind 6 Server service pack on your production server, and if applicable will also need to be installed on your RecFind 6 testing server.

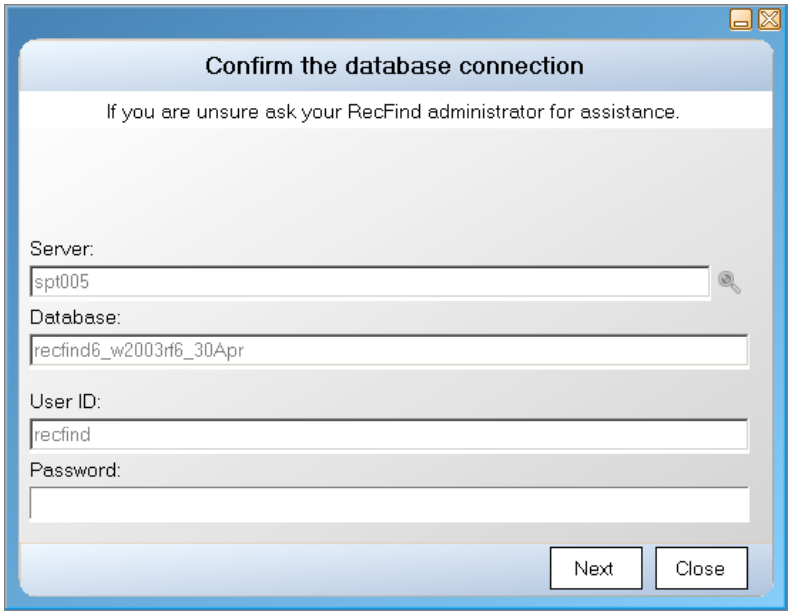
To install, complete the following:

1. Run the “RF6_20_SP1_Server.exe” which you downloaded from the Knowledgeone Corporation web site.

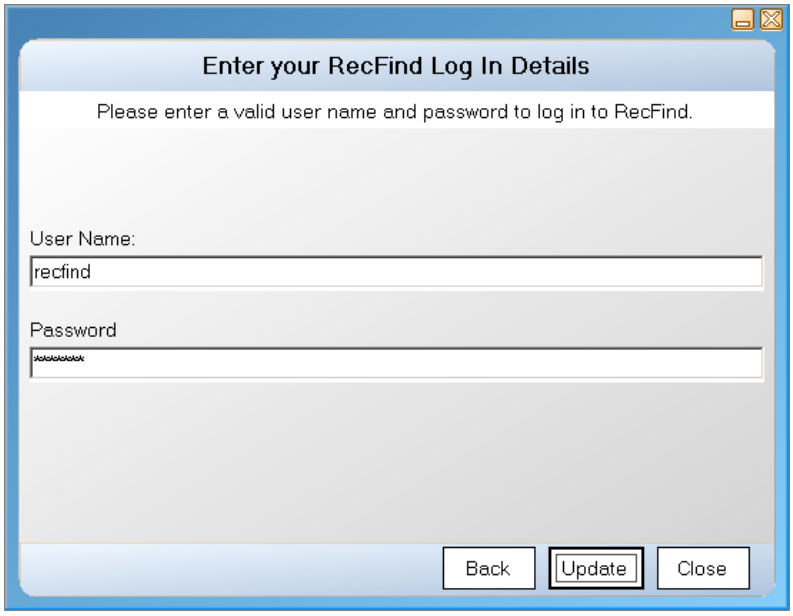
2. Follow the instructions on screen

3. A database update is required as part of the patch – this will happen automatically as part of the installation routine.

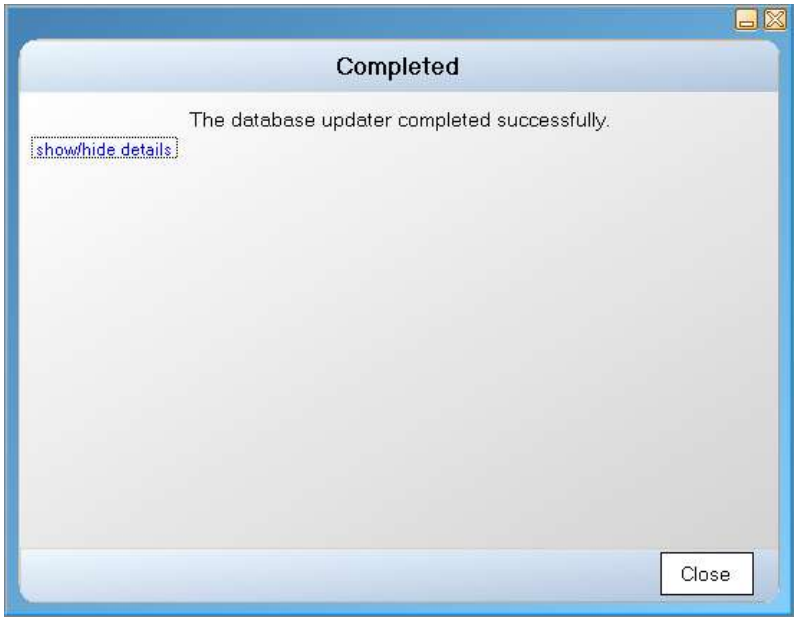
   When prompted for database connection information (see screen below), confirm that the database information provided is correct and click Next.



4. When prompted, enter a RecFind 6 administrator username and password.



5. The update will now run and will you be advised once the update has completed successfully.



RecFind 6 Client

You will need to install RecFind 6 Client service pack on each client that accesses RecFind 6.

To install, complete the following:

1. Run the “RF6_20_SP1_Client.exe” which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

RecFind 6 DRM

You will need to install RecFind 6 DRM service pack on each client that currently has the DRM installed. The DRM is a tool allowing users to configure RecFind 6 and therefore only installed on workstations belonging to the application administrators.

To install, complete the following:

1. Run the “RF6_20_SP1_DRM.exe” which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

RecFind 6 Button

You will need to install RecFind 6 Button service pack on each client that currently has the Button installed. The Button is an add-on product and should only be installed if your organisation has the appropriate licenses.

To install, complete the following:

1. Run the “RF6_20_SP1_Button.exe” which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

3. Once installation is complete, if you use Lotus Notes, an update to the “Click” sub-routine with-in your Lotus Notes template needs to be applied.

The service pack will have updated the click.txt file in the Lotus Notes folder supplied during the initial installation.

Instructions for modifying your Lotus Notes template can be found in the RecFind 6 Button Installation Guide, located in the ‘documentation’ folder of the RecFind 6 CD-ROM.

RecFind 6 RecScan

You will need to install RecFind 6 RecScan service pack on each client that currently has RecScan installed. RecScan is an add-on product and should only be installed if your organisation has the appropriate licenses.

To install, complete the following:

1. Run the “RF6_20_SP1_RecScan.exe” which you downloaded from the Knowledgeone Corporation web site.
2. Follow the instructions on screen

RecFind 6 Conversion Utility

You will only need to install RecFind 6 Conversion Utility if you are yet to convert from RecFind 5. If you have already converted you will not need to install this service pack.

To install, complete the following:

1. Run the “RF6_20_SP1_Conversion.exe” which you downloaded from the Knowledgeone Corporation web site.
2. Follow the instructions on screen

RecFind 6 Xchange (Import/Export Utility)

You will need to install RecFind 6 Xchange service pack on each client that currently has Xchange installed. Xchange is a tool allowing users

to import and export data in the RecFind 6 database and therefore only installed on a limited number of workstations.

To install, complete the following:

1. Run the “RF6_20_SP1_Xchange.exe” which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

Restoring an old database version

If after installing the patch you restore your database back to an “unpatched” state, you must run the database update utility manually.

The Database Updater (“Database Updater.exe”) is located on your RecFind 6 server in the RecFind application folder. It can be found within the sub-folder “Tools\Database Updater”.

The Database Updater must be executed with the name of your Connection Manager server on the command line, i.e. (on a single line):

```
"C:\Program Files\Knowledgeone Corporation\RecFind 6\Database Updater\Database Updater.exe" /CONNMGR:SERVER01
```

where SERVER01 is the name of the server where the Connection Manager service is running.

This command with then prompt for the “System” and update your database.

ENQUIRIES

Email

To easily obtain information by email, send inquiries to:

Sales: sales@knowledgeonecorp.com

Support: support@knowledgeonecorp.com

Training: training@knowledgeonecorp.com

Technical Support

For technical support questions or requests, we encourage you to contact our International Support Center:

Email: support@knowledgeonecorp.com

Toll Free: United States - 1888 325 1614
Canada - 1888 405 9019
UK - 0808 234 8828
Australia - 1800 221 061 (*excluding Sydney)
New Zealand - 0800 445 438

*Sydney customers please phone 8913-9300.

To speed the technical support process, please note the following before contacting the International Support Center:

- K1 Corp Customer Number
- K1 Corp Incident PIN Number

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K1 Knowledgebase

Please refer to our website at the following URL:

http://www.knowledgeonecorp.com/support/knowledgebaseFAQ.htm