



Preparing for RecFind 6

An overview for records, document and
EDRM managers



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Overview

RecFind 6 is the biggest RecFind upgrade ever undertaken by Knowledgeone Corporation.

We have taken the feedback received over the past 20 years and developed a totally new RecFind from scratch - but we've kept all the things our users are familiar with and love.

Many of the limitations that exist in RecFind v5 are now gone – resulting in an extremely flexible application. We've taken away the modular approach and developed a more integration solution – the modules are still there for familiarity but you no longer have to “jump around” the product to do the various tasks.

From a technical point of view, we've addressed many of the technical challenges. In addition to ADO database connections, users will now have the ability to connect to the database via web services – providing you with the optimal connection method for your remote locations. We've redesigned the database to provide a more relational model providing better performance and scalability. There are many more benefits including an easier to maintain database and attachment indexing, less complicated roll-out, for multi-license sites we have centrally configured “database connections” allowing users to easily connect to different RecFind systems from a single client, and much more.

In this paper we discuss some ways you can start preparing for your RecFind v6 upgrade.

Environment changes

RecFind 6 sees a number of changes to the operating environment requirements, they are:

No support for Oracle

Previously we were unable to use all the advanced features of a database as we had to be compatible with both Microsoft SQL Server and Oracle.

In RecFind 6 we now rely even more on the database server and therefore we have elected to only support Microsoft SQL Server 2005 and higher.

For customers currently running in an Oracle environment, a migration to Microsoft SQL Server must be performed prior to upgrading to RecFind 6. For assistance, please contact Knowledgeone Corporation Support at support@knowledgeonecorp.com.

Microsoft SQL Server 2005 or up

As per previous point, in RecFind 6 we only support Microsoft SQL Server 2005 or higher. This is because many of the enhanced features we now rely on are not available in previous releases of Microsoft SQL Server. The RecFind 6 database must be hosted by a Microsoft SQL Server 2005 or higher.

Space requirements

RecFind 6 will require additional storage space. This is due to RecFind 6 allowing for “double-byte” languages (RecFind 6 has multilingual capabilities). This effectively means that the data component of your RecFind 5 database will require twice the amount of space once stored in RecFind 6. You do not need to double the size of your images component.

Another major consideration is the storage of images. The location of the images has moved from the traditional “images” file structure to the SQL Server database. This provides more security and performance benefits to our customers. It does however mean that the storage of images can be moved from your file server to your database server.

You will need to ensure that the current size of your images can be catered for by your database server. The conversion will also require additional space. Please refer to ‘The conversion process’ later in this document.

Office requirements

Certain features now rely on Microsoft Office, for example the spell checking feature. This means that any customization you have done within Microsoft Word, Microsoft Outlook, etc will now be applied to RecFind 6. You must be at least running Microsoft Office 2003 for the spell check feature to be available.

Windows requirements

Although RecFind 6 itself doesn't have specific Windows requirement, many of the components we rely on do. For example RecFind 6 uses the Microsoft .NET Framework v3.5 – therefore you must be running Windows XP, Windows 2003 or Vista.

The conversion process

The conversion process allows for both RecFind 5 and RecFind 6 to co-exist while you are testing. Please note however that you may not run both systems in production mode concurrently (this is a licensing restriction). The conversion from RecFind 5 to RecFind 6 copies your data in to a separate SQL Server database – therefore not altering your RecFind 5 system in any way.

By running both versions side-by-side you can become familiar with the upgrade process and the application prior to committing to a production conversion; however any configuration changes made to your test RecFind 6 system will need to be reapplied when you perform the production conversion.

Conversion Storage Requirements

The database conversion is a two phase process. Firstly the data is imported into intermediate tables, and then processed to create the appropriate RecFind 6 tables. You therefore need to be able to store your RecFind data (including images) approximately twice.

For example, let's say your RecFind v5 data is 1GB and images is 2GB. The data doubles to 2GB (for double-byte support) and with the images it will take the total size of your database to 4GB. For the conversion's intermediate tables you need this much space again, therefore you need approximately 8GB in total – however once the conversion is complete 4GB can be reclaimed.

Post process tasks

There are numerous changes to the RecFind configuration. Where possible we have elected to maintain compatibility with RecFind v5 to minimize the amount of mandatory reconfiguration required before resuming use of RecFind v6 however some data maintenance should be implemented as soon as practical to benefit from the new RecFind 6 design.

For example, in RecFind 5 each database had separate code information. In RecFind 6 we have merged this information into a single table accessible from all "types". The conversion didn't want to make the assumption that the same codes in two different databases were identical, so there will be duplicate codes. After converting, if they have the same meaning you can merge the two codes together therefore receiving the benefit of only having one central code to maintain.

Preparing your data for conversion

RecFind 6 has far superior searching abilities and bulk update abilities. In most cases we believe that the data is best manipulated after the conversion to RecFind 6.

We do however recommend that you commence planning your system requirements and perform some general maintenance to help the conversion go smoother.

Plan security groups

As more and more functions were added in to RecFind, our users have found the RecFind security quite complicated. RecFind 6 introduces Security Groups that combine RecFind v5's privileges (i.e. what functions you have access to) and access rights (i.e. what records you have access to) in to a single security setting. This means that you can have a Security Group for each division within your organization and editing that Security Group affects all users within that division.

As each individual user in RecFind v5 could have unique security settings, the conversion will convert the settings for each user to its own security group.

To take full advantage of security groups you will need to consider what groupings you need, and for each grouping decide on what privileges and rights they will need.

Removing unnecessary data

The less data the quicker and easier your RecFind database will be to convert. Now is the time to remove any unnecessary databases, remove excessive movement history using the Purge module, etc.

Please note that if you delete a code which is in use, the record linking to it will not show the applicable record any more.

Standardise Authors

Your document authors will automatically become linked records. To avoid duplicate Author records for the same author, ensure that they remain the same for all documents. For example, if "Jonathan Scowen" is stored as "J Scowen", "Mr Jonathan Scowen", "J M Scowen", etc – alter them to be consistent.

Other Issues

Integrations

Due to the architectural changes in RecFind 6, any existing integrations with RecFind 5 will need to be re-implemented.

This includes integrations currently implemented using the RecQueryTC-API, any in-house developed Crystal Report templates, RecFind Report Writer format files, automated RecFind Import/Export configuration files, custom developed utilities and modules, etc.

GEM and RecCapture users will also need to reconfigure their rules due to the significant data model change and enhanced functionality now available with these products.

Assistance provided by Knowledgeone Corporation

As always, Knowledgeone Corporation will be on-hand to assist with your conversion to RecFind 6.

Services provided include:

- Upgrade Training
- Health Check
- Installation & Conversion assistance
- Integration Assistance
- Report Customizations
- Saved Searches / Queries
- Data take-ups

Jonathan Scowen
Support Manager

j.scowen@knowledgeonecorp.com

www.knowledgeonecorp.com



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