RecFind 6

Version 2.2

Service Pack Release Notes

1st October 2009

Knowledgeone corporation

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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 2.1 and on completion will upgrade your installation to RecFind 6 Version 2.2.

CHANGES

This section provides a summary of changes introduced in between RecFind 6 v2.1 and RecFind 6 v2.2. For the complete list please see: http://www.knowledgeonecorp.com/support/pdfs/rf6_20_sp2_detailed.pdf.

For changes introduce between v2.0 and v2.1 please refer to the v2.1 release notes.

RecFind 6 Server & Client

- Added the ability for users to modify their password (from RecFind 6 toolbar).

- Improved "screen painting" performance under Citrix and Terminal Services to address issue where the screen displayed very slowly in these environments. Also added a new "Use Low Graphics" option (accessible from the Configure > Colors & Fonts on the RecFind 6 client tool-bar).

- Added new Barcode Movement screen to improve the movement of records using fixed barcode readers. Movements can now be performed without and keyboard input.

- Added Picklist functions as Application Methods allowing each one to be enabled or disable via Security Groups.

- Added MetadataProfile's External ID change rights as an option configurable via Security Groups.

- Improved the auto-complete of drop-down lists, allowing users to type in to drop-down lists to locate records.

- When OCR'ing a document, the progress bar will indicate the page it is up to.

- Relocated the barcode field from User Profile to the Person record (value copied as part of update process).

- The adding a new file part, the security will default to be previous part, not the auto-fill value.

- When viewing your To Do list, a new icon exists allowing you to access the MetadataProfiles and/or Attachments associated with that Task.

- Saved reports are now filtered by MetadataProfile type (ie. only File reports are shown when viewing file records).

Button

- After adding a record, the external ID of the record is now displayed.

- Introduced installation option to replace the Microsoft Office Save and Save As function with the RecFind 6 Button

- Introduced a Button icon for Adobe Acrobat Professional v9 or higher.

DRM

- Field visibility can now be set directly from the field list – no need to modify the field first

- Added option to limit the check-out of attachments to the latest version only

- Added options to specify whether a snapshot of the record should be saved in the audit trail when it is added, modified or deleted. Please note that the entire record is stored in XML and can consume a lot of data, especially if enabled on the EDOC table.

- Can now add other tables to the Maintenance, Metadata Search and Boolean Search areas of the toolbar.

- Can now specify which type is to be used as the default for a type group, i.e. you can specified which specific File Folder type's setting to use when looking at File Folders.

- With foreign keys you can now specify an additional field to display, for example for a File Folder link you can now specify to use the part number of the linked record too.

Xchange

- Major architectural changes were made to Xchange to simplify the importation of records, including the ability to import to multiple foreign keys for the same table.

  Please note that settings file created in previous versions of Xchange are no longer compatible and must be recreated.

- Added Microsoft Access 2007 connection string.

RecScan

- Added XML data file detection to allow metadata to be imported from an XML file for each image. This is to support new DocScan forms processing features.

Conversion Utility

- Fixed a number of issues, including:

  - Loose documents not converted correctly

  - Current Location not populated in all instances

  - Incorrect conversion of Standard Reply By tasks

  - Multiple sequence titles not converted correctly.

  Please note that all the above issues are automatically repaired by the database updater for those sites who have already converted to RecFind 6.

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)
- RecFind 6 Configuration Import Utility
- RecFind 6 RecCapture

* = 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_SP2_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.
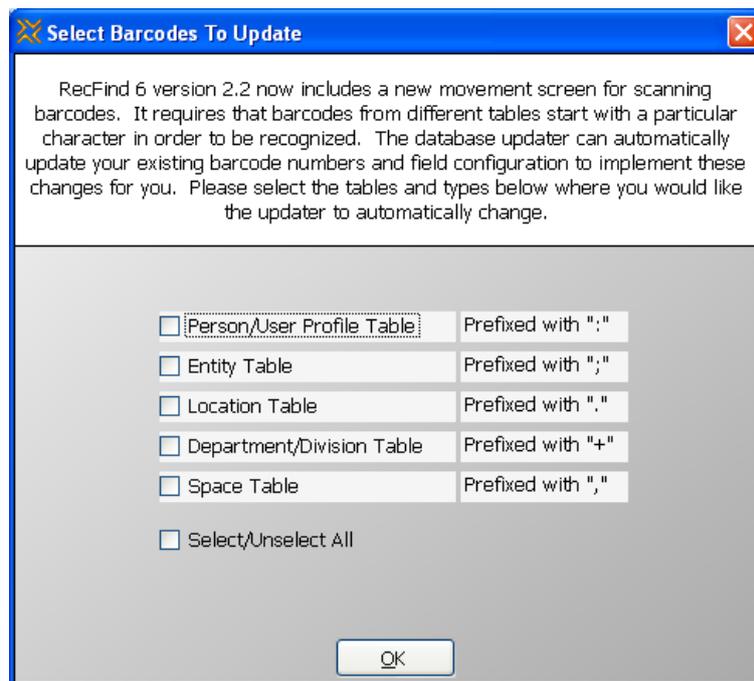

5. You will then be given the option to update your barcode numbers to support the new barcode movement functionality introduced in v2.2. To use this new feature you need to flag each of the different types of barcodes so RecFind 6 can differentiate between them.
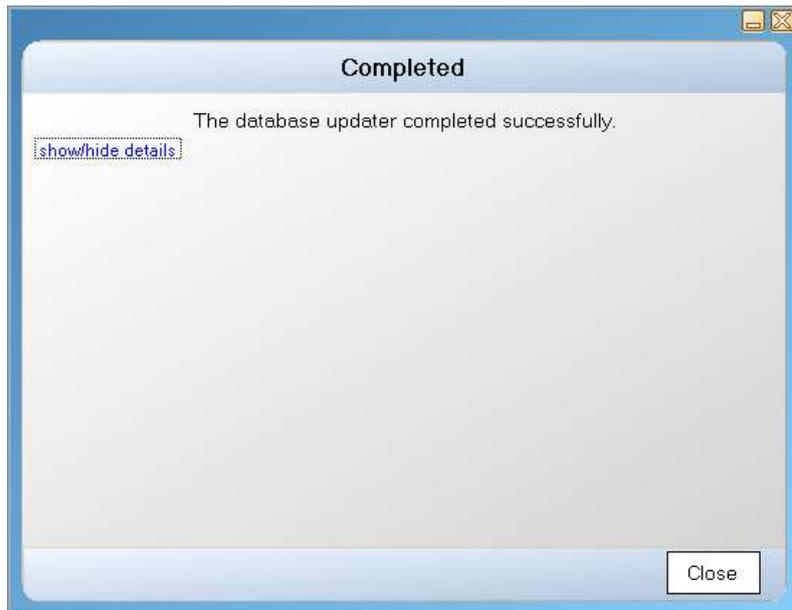
   It is optional because if you have already printed Person (known as Action Officers in RecFind 5), Location, Entity (Records Centres), Department and/or Space barcodes then they will

need to be re-printed. Please note however that Person and Location barcodes printed using RecFind 5 or earlier releases were prefixed so there should be little to no effect in the majority of cases.

Note: this tool can be run at a later date via C:\Program Files\Knowledgeone Corporation\RecFind 6\Tools\Barcode Tool\Prefix Barcode Fix.exe located in your RecFind 6 server installation.

6. 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_SP2_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_SP2_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_SP2_Button.exe" which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

Upgrading from v2.0 to v2.2

If upgrading from v2.0 and 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.

Upgrading from v2.0/v2.1 to v2.2

To implement the new functionality that replaces Microsoft Office Save and Save As functionality introduced in v2.2, you will need to modify your RecFind 6 Button installation via Add/Remove Programs (or Programs & Features if using Vista) located your Windows Control Panel and tick the option.

RecFind 6 RecScan

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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_SP2_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_SP2_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

RecFind 6 Configuration Import Tool

You will need to install RecFind 6 Configuration Import Tool service pack on each client that currently has the Configuration Import Tool installed. The Configuration Import Tool is a utility allowing users to copy their RecFind 6 configuration from one system to another and therefore only installed on workstations belonging to the application administrators.

To install, complete the following:

1. Run the "RF6_20_SP2_Config Import Tool.exe" which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

RecFind 6 RecCapture

You will need to install RecFind 6 RecCapture service pack on each machine that currently has any RecCapture components installed – ie. the Agent, the Configuration Tool and/or Queue Processor.

To install, complete the following:

1. Run the "RF6_20_SP2_RecCapture.exe" which you downloaded from the Knowledgeone Corporation web site.

2. Follow the instructions on screen

Deploying via MSI

With the exception of the Server and RecCapture Service Packs, an MSI of any of the above updates can be extracted by running them with a /A command line option, eg. "RF6_20_SP2_Client.exe /A"

The MSI needs to be modified to contain appropriate settings before distribution. For instructions on modifying the MSI please refer to the RecFind 6 v2.2 Installation Guide.

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Updated version of RecFind 6 documentation can be found at:
http://www.knowledgeonecorp.com/

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.

The Barcode update tool can also be used manually at any time. It can be found with-in the sub-folder "Tools\Barcode Tool" and called "Prefix Barcode Fix.exe", ie. by default:

```
"C:\Program Files\Knowledgeone Corporation\RecFind
6\Tools\Barcode Tool\Prefix Barcode Fix.exe"
```

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:

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