

RecFind 6

Version 2.5



Service Pack Release Notes

November 2012



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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 all previous RecFind 6 releases (i.e. v2.0 to v2.4) and on completion will upgrade your installation to RecFind 6 Version 2.5.

CHANGES

This section provides a summary of changes introduced in between RecFind 6 v2.4 and RecFind 6 v2.5.

For changes introduced by previous service packs, please refer to the corresponding service pack release notes available from the Knowledgeone Corporation web site.

Please note that products not specifically listed below have still changed. All products must be upgraded at the same time.

Detailed information on new features is available from the online help and/or updated user guide of the applicable product.

New Products

- A web services SDK is now available. For more information please contact 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

INSTALLATION

The service packs are provided to update existing installations of RecFind 6.

There is no need to install any previously released service packs prior to loading this service pack. All service packs are accumulative.

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 *
- RecFind 6 Web Client and Mini-API *
- RecFind 6 VEO Export Tool

* = 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).

Note: Changes introduced in v2.3 will cause an error if attempting to mix versions.

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.

The Server update will make changes to the database, and may include rebuilding a number of database indexes and the entire full-text search index. These index updates may require SQL Server to process a large amount of data and temporarily put a high processing load on your server – please consider the effect this may have on any other applications sharing the SQL Server and schedule the upgrade accordingly.

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.

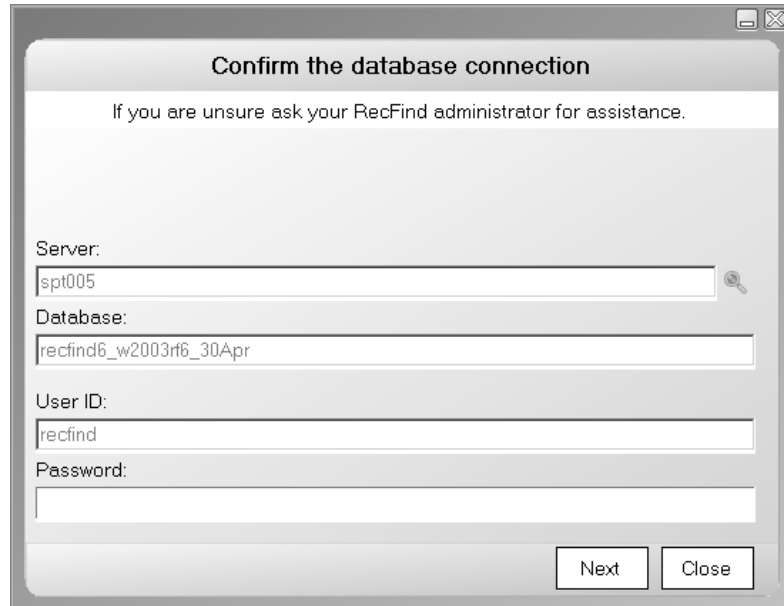
Once the server component is installed, no client applications will function. They will be unable to connect due to the version difference.

To install, complete the following:

1. Run the “RF6_20_SP5_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.



A screenshot of a Windows-style dialog box titled "Confirm the database connection". The dialog has a light gray background and a title bar with standard window controls. Below the title, there is a message: "If you are unsure ask your RecFind administrator for assistance." The main area contains four labeled text input fields: "Server:" with the value "spt005", "Database:" with the value "recfind6_w2003rf6_30Apr", "User ID:" with the value "recfind", and "Password:" which is empty. At the bottom right, there are two buttons: "Next" and "Close".

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



A screenshot of a Windows-style dialog box titled "Enter your RecFind Log In Details". The dialog has a light gray background and a title bar with standard window controls. Below the title, there is a message: "Please enter a valid user name and password to log in to RecFind." The main area contains two labeled text input fields: "User Name:" with the value "recfind" and "Password:" with masked characters (asterisks). At the bottom right, there are three buttons: "Back", "Update" (which is highlighted with a black border), and "Close".

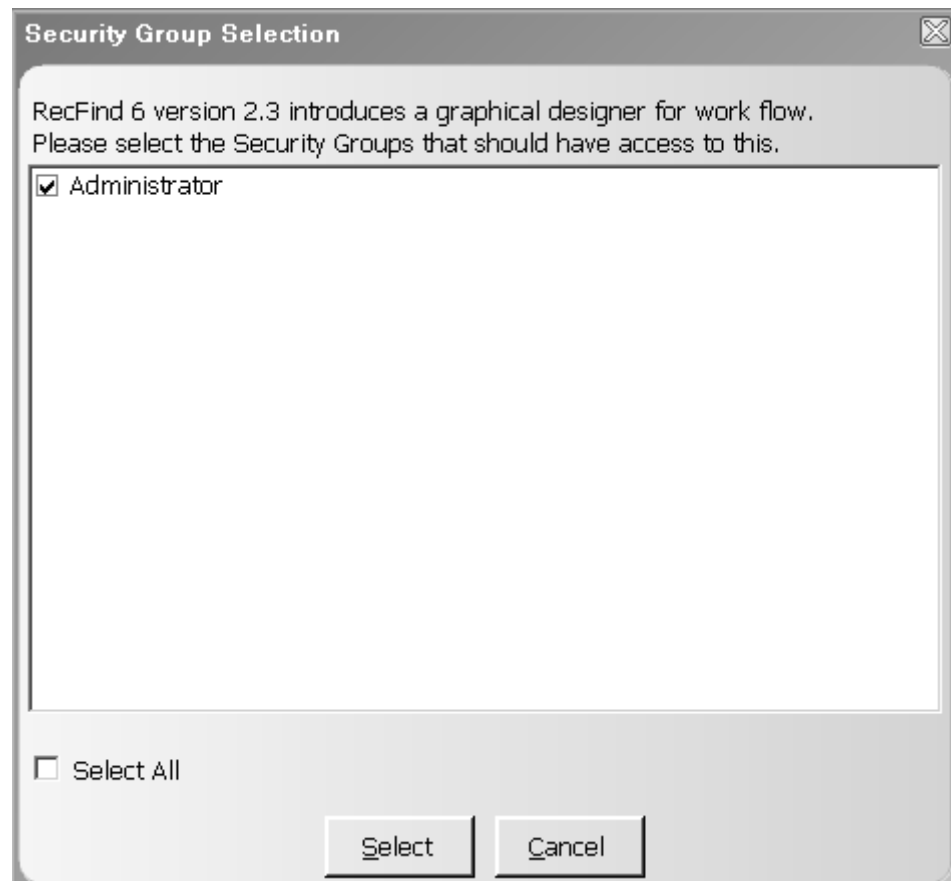
5. Depending on the version you are upgrading from you will be prompted for 1 or more configuration updates.

Upgrading from v2.3 / 2.4

There are no prompts.

Upgrading from v2.0 / 2.1 / 2.2

V2.3 introduced a new Security Group option controlling whether users have the ability to use the Graphical Workflow Designer.



The conversion process will prompt for which security groups should have access to this new function. Tick the relevant security groups or click on the Select All option to apply the change to all security groups.

Click the Select button to make the change.

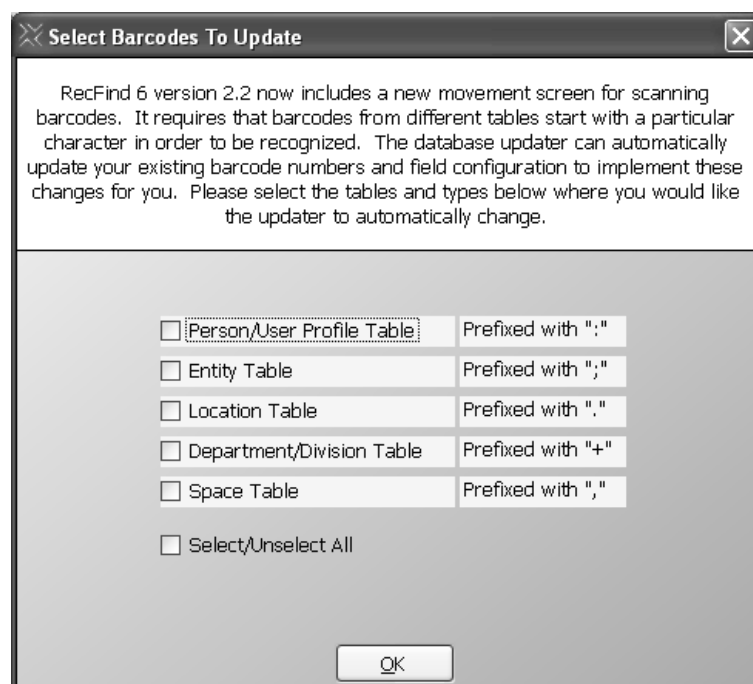
If any security group are incorrectly selected, you can make the configuration changes later via the DRM.

Upgrading from v2.0 / 2.1

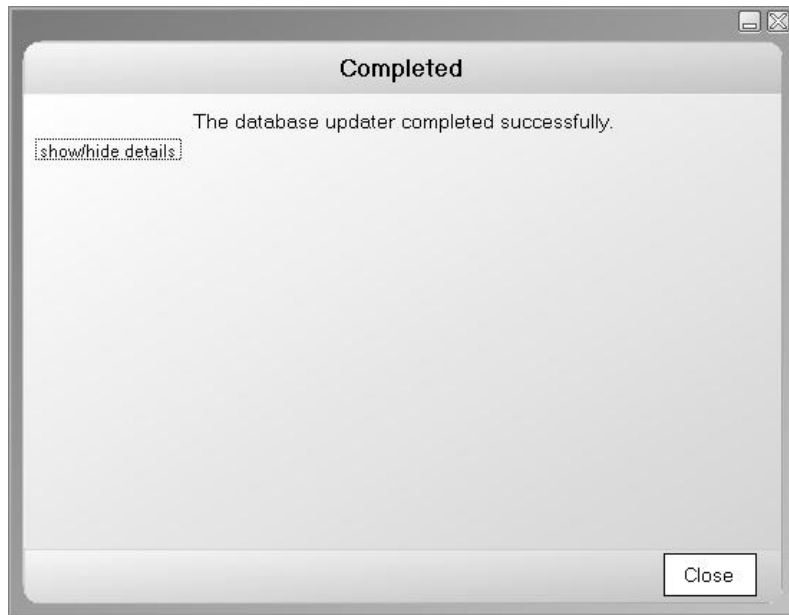
V2.2 saw the introduction of a new Barcode Movement function that requires the different types of barcodes to be prefixed so the system can differentiate between the different types.

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_SP5_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_SP5_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_SP5_Button.exe” which you downloaded from the Knowledgeone Corporation web site.
2. Follow the instructions on screen

Lotus Notes Integration

If upgrading from v2.3 and you use Lotus Notes, various template functions need updating and there are also some new functions needed. These files will be updated by the service pack.

Updated functions:

- Click.txt
- Declarations.txt
- fnReplaceSubString.txt

New Functions:

- CleanString.txt
- GetButtonPath.txt
- MakeDirectories.txt

Removed Functions:

- QueryValueEx – is no longer used and needs to be removed

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.

Implementing Microsoft Office "Replace Save and Save As"

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

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_SP5_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_SP5_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_SP5_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_SP5_ConfigImportTool.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_SP5_RecCapture.exe” which you downloaded from the Knowledgeone Corporation web site.
2. Follow the instructions on screen

RecFind 6 Web Client and Mini-API

You will need to install RecFind 6 Web Client and Mini-API service pack on the IIS web server where it was originally installed. The Web Client and Mini-API are add-on products and this service pack should only be installed if your organisation has one or both of these licenses.

To install, complete the following:

1. Run the “RF6_20_SP4_Mini-API.exe” which you downloaded from the Knowledgeone Corporation web site.
2. Follow the instructions on screen

RecFind 6 VEO Export Tool

You will need to install RecFind 6 VEO Export Tool service pack on the workstations where it was originally installed. The VEO Export Tool only applies to site who have decided to enable the VERS Compliance options and need to create VEOs.

To install, complete the following:

1. Run the “RF6_20_SP4_VEOExportTool.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_SP5_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 Installation Guide.

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 will 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 within the sub-folder “Tools\Barcode Tool” and called “Prefix Barcode Fix.exe”, i.e. by default:

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

ERRATA

Special Note Regarding Microsoft Office 2010

Any RecFind 6 component that performs OCR functionality (i.e. DocScan and RecFind 6 Client) does so by utilising the Microsoft Office Document Imaging (MODI) component.

Microsoft Office Document Imaging (MODI) has been removed in Microsoft Office 2010.

Microsoft has published information on how to use MODI with Office 2010. For instructions please refer to:

<http://support.microsoft.com/kb/982760>

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>