

REC FIND

VERSION 5.0

RELEASE NOTES

INTRODUCTION

PLEASE READ THIS DOCUMENT IN FULL.

RecFind 5.0 is a major upgrade to the RecFind system. This document details the new features and important information regarding the product.

The following manuals are also provided with RecFind 5.0:

- Upgrade Guide – A ‘Quick guide’ specifically designed for customers upgrading from a previous release of RecFind and RecFind ‘Add on’ products (Hard copy only).
- Installation Guides – Detailed technical information and instructions on the installation of RecFind 5.0 and RecFind 5.0 ‘Add on’ products (Electronic only).

- User Guides - Comprehensive manual detailing the features of RecFind 5.0 and RecFind 5.0 'Add on' products (Electronic only).

Please see the RecFind 5.0 Upgrade Guide for information on accessing RecFind 5.0's electronic manuals.

NEW FEATURES – AN OVERVIEW

There have been many changes to the RecFind 5.0 product. This is the most significant new release we have ever offered. The functionality of RecFind has increased by at least fifty percent. It represents over twenty man-years of development time. Whereas it is a superset of RecFind 4.0 and maintains the same general 'look and feel' many modules have been rewritten and most of the others have been changed so that many areas of the product may look very different to experienced RecFind 4.0 users. There are also many new features. The major functionality changes include:

- **New Help System** - With many more context sensitive help buttons, especially in the Administrator/Codes and reporting functions. The size of the Help file has more than doubled with many more detailed explanations and sample screen shots. All new and changed functions are covered within the new Help system. Context sensitive help can be viewed by either selecting the Help button in each function or pressing F1.
- **Improved Security System** - RecFind 5.0 includes an enhanced security system. These changes included a rewrite of the Privilege Level function which is now totally configurable instead of being 11 fixed Privilege Levels. It also includes a change to the Action Officer security such that an additional set of Security Codes may be assigned to just Search Functions. Many tables in RecFind now have an optional Security Code which may be applied to entries thereby restricting access to those entries.
- **Enhanced Audit Trail System** - The RecFind Audit Trail system now writes an audit trail record for every transaction including view and administrative

transactions. The Audit Trail report program has also been enhanced to facilitate the selection of all or any of these new transactions.

- **Enhanced Section 508 Compliance; Sound and Color** - We have made many changes to RecFind to better meet the requirements of this legislation and have in fact provided more facilities than are required under this legislation. For example, we have re-engineered the main RecFind toolbars so that they 'shrink' to fit the screen under extremely low resolution settings. We have also added the ability to add sound and color to all main RecFind functions making it easier for users with sight or hearing issues to use our product. All color and sound settings can be configured to the specific requirements of each user.
- **Additional Report** - The Reporting module now includes a File Plan report to support the extended File Plan capabilities of the Keyword Thesaurus function.
- **Faster Reports** - Many of the standard reports in the Reporting module have been rewritten to make them significantly faster. We have also upgrade the Crystal Reports Engine used from version 7 to version 8 specifications to also enhance reporting speed.
- **New E-mail Document & Attachment Feature** - The Email menu on the main toolbar now includes and option to email a selected document profile plus its attachments.
- **Support for the Latest Environments** - RecFind 5.0 has undergone comprehensive testing to ensure support for the latest operating environments including Office XP, Windows XP and GroupWise 6.

- **Extended Import/Export Utility** - Now supports all of the new Metadata in RecFind plus the export of Electronic Objects and Images - the Import/Export utility has been significantly enhanced such that it can now Export both object profiles (Metadata) and any attached electronic documents and images. You can use this function to export a complete record set, for example, for accessioning records to an external storage facility. This function can now also be used to export complete records to any other records management system.

- **Enhanced Workflow** - The functions used to build Procedures (Workflow) has been rewritten and given an optional Graphical User Interface (GUI). We have also added the concept of 'Precedents' to give you more control over the scheduling and initiation of workflow.

- **Enhanced Standard Letters** - This Workflow related function has been rewritten to provide 100 standard letters, the ability to create and add standard paragraphs, the ability to email or export standard letters plus the ability to export the data for a mail merge using packages like MS Word.

- **New Tables and Fields** - We have added many new tables and many more fields to existing tables to significantly extend the Metadata capabilities of RecFind. You should review all this new Metadata after converting and decide which tables and which new fields would add value to your installation. In most cases the new Fields and tables can be seen on the new 'second' or 'Other' screens for File, Document and Box profiles. You access this new screen by clicking the 'Other' tab. It was done this way so as not to change the way you currently work or change your initial view of File, Document and Box profiles.

- **Extended Metadata** - RecFind now has a configurable data model. Your RecFind Administrator can now dynamically build new screens and new search screens without the need for programming. RecFind can now be extended to suit the requirements of almost any application, e.g., Asset Management, HR Management, Property Management, Correspondence Management, Contact Management, Complaints Management, Help Desk, Collection Management, etc. Each RecFind database can be configured uniquely with its own Extended Metadata design.
- **Extended Prompts (Caption) Configuration** - To further enhance the configurability of RecFind we have added an option to the File and Document Prompts to make selected fields invisible. This allows your Administrator to select fields not used by your site. RecFind dynamically rebuilds and resizes the File and Document forms when this is done.
- **Enhanced Movements Functions** - The File, Document and Box movement functions have been enhanced so you can now display the Movement history of an object or an Action Officer.
- **Enhanced Document Maintenance Module** - This module has received more changes and enhancements than any other module in RecFind. As well as the new 'Other' screen it includes a new Addressee/Other Address table plus a greatly expanded Attachment profile. We have also rewritten the imaging function to make it a much simpler and faster process to capture multi-page TIFF files.
- **New Clone Feature** - File, Document and Box profiles can now be 'Cloned' from an existing profile. This new function has many uses including the rapid creation of

'like' profiles plus the creation of profiles from 'templates'.

- **New Search Functions** - The Search module benefits from an extensive array of new features including automatically built search screens for your Extended Metadata (nothing for you to do, RecFind creates the screens the instant you finish designing your new screens), a new search by Attachment profile and a new search by Addressees/Other Addressees.
- **Enhanced Retention Module** - This module has doubled its functionality adding the ability to select records for processing by many more criterion plus the ability to 'Freeze' and 'Unfreeze' records and the ability to manage all of your Vital Records. We have also added an 'Active' option so you can effortlessly process and reclassify records coming back from boxes.
- **New RecFind File Filter** - We have completely rewritten the File Filter program so that each user has his/her own filters and to provide a number of automatic 'background' ways to run the File Filter. The new File Filter program is the 'GEM-EDOC' program mentioned in our newsletters. As GEM-EDOC it was to be a separately chargeable product. We decided to integrate it into RecFind-Corporate 5.0 and make it a non chargeable addition.
- **New RAF (RecFind Archive Facility) Module** - We have completely redesigned and rewritten this module to make it easier to use, faster and more flexible. It is now the perfect tool for moving electronic documents and images to second level storage.

- **Greatly Enhanced Codes Module** - This is where your Administrator will define all of the new tables and fields available in RecFind and customize them to the exact requirements of your site. The new tables and fields are as follows:

RecFind Function	New
File	Extended Metadata
	User Defined Table 1
	User Defined Table 2
	User Defined Table 3
Document	Extended Metadata
	User Defined Table 1
	User Defined Table 2
	User Defined Table 3
	Author Authority Table
Security	Privilege Codes (configurable)
	Extended Action Officer Security (Search)
	Ability to mark an AO 'Inactive'
Retention	New option to force 'Cut off' at end of year, half year, quarter and month
Prompts	Ability to define fields as invisible
Miscellaneous (new)	Five (5) new tables; Vital Record Types; Media Types; Attachment Formats; Originating Organization and Supplemental Markup.

- **Enhanced Password Functions** - A RecFind Administrator can now define both the minimum length and the life of a password. RecFind will begin warning the user to change the Password fifteen days before the password is due to expire. This new function meets the

requirements of the US DOJ specification for passwords.

The above is just a brief summary of the new and enhanced features in RecFind 5.0. Please consult your new Help screens when RecFind 5.0 is installed for a detailed description of the operation of each new and extended function. There is also a new RecFind User Manual on the CD in electronic format which covers every feature in RecFind, old or new. However, you should not need to reference this as everything is covered in the new Help screens.

UPGRADING FROM A PREVIOUS RELEASE

Note that you can only upgrade from RecFind 4.0.

If you are on a release previous to RecFind 4.0 (e.g., 3.2) you will first have to upgrade to RecFind 4.0 before proceeding with the installation of RecFind 5.0.

Please consult the attached *Upgrade Guide* for information on upgrading to RecFind 5.0.

TECHNICAL ERRATA

Codes Maintenance Calendar - You may experience a problem when attempting to open the calendar from the RecFind toolbar or the Codes Module if you are running Office XP. This is due to a bug in Office XP where a particular OCX is source code incompatible with previous versions of this same OCX. Microsoft has released a fix for this problem as follows:

Access 2002 Issues That Are Fixed by Office XP Service Pack 2

The update fixes the issues that are described in the following Microsoft Knowledge Base articles. Additionally, this article summarizes other issues that are fixed.

311219 BUG: Office XP Version of Mscal.ocx Breaks Binary Compatibility for Early Bound Clients

URL to site

<http://support.microsoft.com/default.aspx?scid=kb;en-us;325670>

Customized Report Templates - Due to changes in the Crystal Report templates from RecFind 4.0 to RecFind 5.0, any customized templates that you used in RecFind 4.0 will not be compatible with RecFind 5.0. Your original RecFind 4.0 templates have been saved in a directory called custom40 which is located in the Reports sub directory of your RecFind 5.0 installation.

Microsoft NT 4.0 Workstation as a client operating system - With Microsoft ceasing support for Windows NT 4.0 workstation after June 30 2003, GMB is no longer able to support this client environment.

Although RecFind 5.0 has been tested on this environment, it is not certified to be error free and we do not recommend it as a workstation operating system for RecFind 5.0.

Issues reported to our support department by customers using NT 4.0 workstation can only be supported if the issue can be replicated in other supported environments.

For more information please refer to Microsoft's web site, at: [http://support.microsoft.com/default.aspx?scid=fh;\[ln\];lifean5](http://support.microsoft.com/default.aspx?scid=fh;[ln];lifean5)

FUNCTION ERRATA - FEATURES TO BE RELEASED

At the time of release some new previous features of RecFind were not included on the RecFind 5.0 CD-ROM. These features will be added at a later date.

- New Portable Barcode Reader Programs - We have designed a suite of new programs for the Datalogic F734 portable barcode reader. These programs are in response to many requests from users for additional functionality for the portable. The new programs are for:
 - File Folder Census by Action Officer
 - File Folder Census by Location
 - Document Movements by Action Officer
 - File Folder Movements by Action Officer
 - Box Census by Location
 - Box Contents census
 - Archiving

As RecFind 5.0 is already many months late, we made the decision to ship these new programs at a later date rather than delay RecFind 5.0 any further. These new programs will be free of charge to all RecFind customers. Expect to see them within 3 months.

- There are a number of additional changes and enhancements that did not meet the RecFind 5.0 cutoff. This will be progressively released in updates such as RecFind 5.1 and 5.2 later in 2003 and 2004.

GETTING HELP

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

Email: support@gmbsupport.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)

* Please note, the Australian toll free number excludes Sydney customers. Sydney customers please phone 9420-8511.

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

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

GMB Web Site

Visit our web site at www.gmbsupport.com for information on the latest GMB products, support issues and training dates.