



Release Notes

Product: TAB FusionRMS, All Editions

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Release Version 10.1.1847

Version History

10.1.1847 September 18, 2018

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1. New Features in 10.1

Integration with Microsoft SharePoint®

TAB FusionRMS 10.1 can be integrated with Microsoft SharePoint® to enable the following operations:

- Copy to FusionRMS enables a user to copy content from a Microsoft SharePoint® document library to Fusion. Only the current version of the contact is copied, metadata is not copied. This feature requires the creation of indexing linkscripts in FusionRMS.
- Move to FusionRMS enables a user to move content from a Microsoft SharePoint® document library to Fusion. The original content is deleted from Microsoft SharePoint®. Only the current version of the contact is moved. This feature requires the creation of indexing linkscripts in FusionRMS
- Unified Search, enables users to search and find content residing in either FusionRMS or Microsoft SharePoint®
- FusionRMS Webpart, allows users to access FusionRMS Web Access from within the Microsoft SharePoint user interface.

Web Access Client

In version 10.1, the TAB FusionRMS Web Access user interface provides all the same functionality you are used to (and a few new features) with a modern look and feel, with a renewed focus on usability. The major changes include:

- My Favorites, allows users to create multiple named lists of records that are stored per user on the FusionRMS server. My Favorites lists based on their related FusionRMS view, meaning they inherit the security and fields of the view. The list can only contain records of the underlying view. Users can add and remove records from the list and the contents of the list will not change unless security, retention, workflow or other processes act on the record.
- My Query, allows users to create multiple named query criteria that are stored per user on the FusionRMS server. My Query is analogous to a saved search. My Query is based on their related FusionRMS view, meaning they inherit the security and fields of the view. Users can not or remove records from the results. The results displayed in My Query are dynamic and will change with security, retention, workflow or other processes that act on the record.
- Background processing allows users to export or transfer a large set of records in the background. Previously these operations took a long time and did not allow the user to perform other operations. Background processing places the operation in a queue for processing and allows the user to continue with other activities. The lower and upper limits of Background Processing can be configured in the FusionRMS Settings table.
- Background Status, this new screen enables users to see the status of operations that have been placed on the Background Processing queue. The Background Status screen is also where users will retrieve the results of the operation, for example, result reports, exported content, etc.
- Audit reports similar in functionality to what is available in Desktop have been added to Web access.
- Record import feature in WebAccess now supports the placeholder tokens @@TIME, @@NOW, @@TODAY, @@SL_UserName

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- Clickable bread crumb navigation has been added above the main data grid. This feature enables easier navigation through the records hierarchy.
- Information menus, Tracking history, Retention information have been moved to the information menu for easier access.

Full-text Search

TAB FusionRMS full text utility will now extract embedded text from PDF files for searching, in addition to the previous Imaging-OCR technique.

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2. New Features in 10.0

Web Access Client

In version 10.0 the major changes include:

- Multiple holds can be applied to a single record
- A modern look and feel with greater browser support, and more 'break crumbs' to help new users feel at home
- Multi-Language support with English and French out of the box
- Clearer navigation between Workspaces, with movable navigation panel on left
- Personalized date formats
- Landscape oriented screen layout for better usability
- Resizable and sortable columns for better usability
- Task Pane and tracking panels can be hidden to maximize screen real-estate, but yet these areas are a single click away without being distracting
- Dropdown navigation to dependent information to maximize the productivity of the user interface
- Infinite scroll data grids for easier navigation and increased productivity

Technology

- With version 10.0, .Net 3.5 is no longer required for customers who are not using attachments
- TAB FusionRMS supports broader range of browsers including, Google Chrome®, Microsoft Edge® and Internet Explorer®, Apple Safari®. Allowing users to access their critical information from a broader array of devices.

TAB FusionRMS mobile application

The mobile application allows you to access and manage your records and information anytime, anywhere. You can search for and review documents from your preferred mobile device.

Features and functions

- Access FusionRMS on your Apple iOS or Android device
- Connect securely to your FusionRMS database
- Navigate the document repository
- Search for documents based on metadata and document contents

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- Retrieve database items based on barcode
- Read barcodes using your device's built-in camera
- Download attachments
- Request and transfer physical objects

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3.Fixed Issues in 10.1.1847

The notes in this section relate to the 10.1.1847 release only and are not associated with any other version.

- [FUS-5583] Database upgrade incorrectly modifies data tables that have TinyInt data types
- [FUS-5525] [WebAccess] Improvement responsiveness of query window pop.
- [FUS-5506] [WebAccess] Selecting a Breadcrumbs displays the entire table and not the previously filtered dataset
- [FUS-5497] [WebAccess/Desktop] Records disposed as part of a partial batch have their Disposition Date overwritten when the rest of batch is processed for disposition
- [FUS-5457] [WebAccess] Selecting “Found in Attachment Link” does not open the attachment viewer in browsers other than Internet Explorer
- [FUS-5316] [WebAccess] Adding Attachments using Import module fails in certain circumstances

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4. Known Issues in 10.1

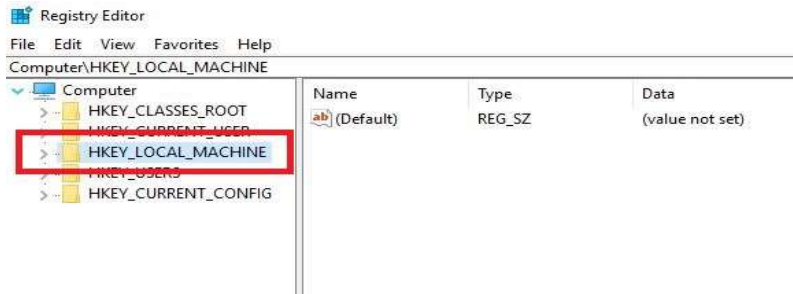
The notes in this section relate to the 10.1 release only and are not associated with any other version.

Installation

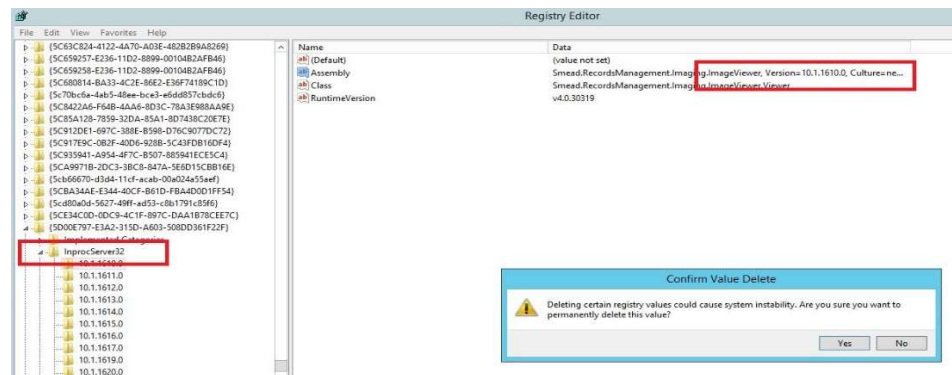
The notes in this area are related to all installations and are not dependent on version numbers. Installation notes can relate to the application, additional modules (such as Bar-code Tracking), SLIM Server, and Service Manager. Installation can occur on servers, administrator stations, and end-user desktops.

- FUS-2559 [Issue] The Datalogic Barcode reader is not recognized in Windows 10. This issue is corrected by uninstalling and reinstalling Windows Mobile Device Center (MDC).
- If the attachment viewer in Internet Explorer continues to ask to be installed after multiple attempts.
 - Ensure the user executing the installation is an administrator on the local machine with the permission to install software.
 - Under some circumstances the windows registry requires editing.

- Navigate to Start menu and type "RegEdit" in search bar (regedit.exe) then click Enter.
- Select HKEY_LOCAL_MACHINE and Right click on it, select Find.



- In Find What: Textbox enter "ImageViewer" and click Enter.
- Look for the keys with Smead.RecordManagement.ImagingViewer by hitting F3 each time which choose 'Find Next'
- Delete all keys with any version number other than Smead.RecordManagement.Imaging.ImageViewer,Version="10.1.1812"
- While deleting keys check the "InprocServer32" Keys for entries with previous version numbers and delete those keys other than version "10.1.1812".



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System Configuration

The notes in this area are related the system configuration of the application prior to any application configuration. System Configuration notes can relate to SLIM Manager, user seats, upgrade utilities, licensing, and Active Directory. Setup procedures usually occur before the application has been opened for the first time.

- None at this time.

Application Configuration/Administration

The notes in this area are related to configuring and customizing the application. Application Configuration/Administration notes can relate to items in the Admin Manager, including security, database map, table properties, view setup and customizing, and report setup and customizing.

- None at this time.

End User

The notes in this area are related to end-user functionality and procedures. End user notes may include general application usage, attachments, reports, check in/check out, orphan attachments, bar code tracking, and printing.

Note: The 'end user' may also include the administrator of the application.

- **Viewing attachments:** The viewing of attachments from Web Access in browser other than Internet Explorer will not display attachments with annotations.

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5. General Notes

The notes in this section relate to the general TAB FusionRMS 10.1 release and are not associated with any specific versions.

Installation

The notes in this section relate to all installations and are not dependent on version numbers. Installation notes can relate to the application, additional modules (such as Bar-code Tracking), SLIM Server, and Service Manager. Installation can occur on servers, administrator stations, and end-user desktops.

- **Web Access, black and white label printing** requires the “Microsoft Print to PDF” or Win2PDF or Win2PDF TSE. Win2PDF or Win2PDF TSE are third party printer drivers for creating PDF files and not included in TAB FusionRMS. Win2PDF or Win2PDF TSE must be purchased separately.

System Configuration

The notes in this section relate to the system configuration of the application prior to any application configuration. System Configuration notes can relate to SLIM Manager, user seats, upgrade utilities, licensing, and Active Directory. Setup procedures usually occur before the application has been opened for the first time.

Application Configuration/Administration

The notes in this section relate to configuring and customizing the application. Application Configuration/Administration notes can relate to items in the Admin Manager, including security, database map, table properties, view setup and customizing, and report setup and customizing.

- **Auto Counters:** Whenever possible, it is best to use an Auto Counter ID field when creating tables in TAB FusionRMS. If field editing is required, an alternate (unique) field can be added and used for Bar Code Tracking and search functionality.

End User

The notes in this section relate specifically to end-user functionality and procedures. End user notes may include general application usage, attachments, reports, check in/check out, orphan attachments, bar code tracking, and printing. Note: The ‘end user’ may also include the administrator of the application.

- **Adding Attachments:** Empty files, such as a TXT file with no characters, cannot be attached to a database. Users will be reminded of this if an attempt is made.
- **Passwords:** Passwords are case-sensitive. Users of previous versions with converted databases will need to enter their passwords with this in mind. If users do not remember the case-sensitive version of their passwords, a member of a group with the Security Users or Security Configuration permission will have to re-set the password by entering a new password and setting it. After a new password is set, it is then recommended that the Password Change Required checkbox be selected so that the user will have to create a new password during the next log in.
- **Check in/Check out:** The Check in/Check out process is user/machine-based. During the check-out process, temporary files are copied to the local computer. If the same user logs onto a second computer and attempts to view the same attachment, the application will implicitly perform an undo check out because the temporary file does not exist on the second computer. The recommendation is that users should check out the attachment, perform the necessary work, and then check in the attachment. Users

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should not leave an attachment in a checked-out state and then attempt to manipulate that attachment from a second computer.

- **Adding Pages to Word Document Attachment:** Open the attachment in the attachment viewer. Check out the attachment, using either the file menu or the lock icon on the toolbar. Open the attachment in its native application by clicking on the document icon on the far-right side of the toolbar. Add the new pages. Save. Check in the attachment, using either the file menu or the unlock icon on the toolbar.
- **Publishing Images with FusionRMS Snapshot:** Redactions are published. Annotations are not published.
- **Multi-page attachments:** Multi-page attachments with several hundred or thousands of pages will take an extremely long time to display in TAB FusionRMS. It's recommended that the attachment be segmented into multiple attachments then indexed.

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6. Discontinued Items and Features

- **Access databases:** TAB FusionRMS supports SQL databases only. Access databases can be converted to SQL with the conversion utility.
- **SL Compact and Repair utility:** This utility no longer ships with TAB FusionRMS since Access databases are no longer supported.
- **Delete All Children:** In previous versions, a security setting called 'Delete All Children' could be used to grant access to this functionality when deleting a record and its related children. This permission is now handled with the 'Delete' permission at the Tables level of Securables and Permissions.
- **Databases available at login:** In the Slim Manager of previous releases, users could specify which databases would be available on the login screen for select Active Directory groups. In 10.1, all connected databases will appear on the list.
- **Allow requests:** In previous versions, the *Allow Requests* checkbox in the Admin Manager > Application > Requestor, enabled the request functionality for the system. This is now handled at the table level. Each table contains an *Allow Requests* checkbox.
- **Options:** In order to preserve security integrity and avoid an authorized user from viewing a network user name, the *Set Network Name as User Name* option has been removed from the General tab on the Options screen.
- **Filter Orphans:** The Filter Orphans option has been removed from the Orphan Viewer.

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