



# **TAB** fusion**RMS**

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**Release Notes - version 10.0**

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## Document conventions

Version control is maintained to provide a history of the changes to this document. The version numbering matches the corresponding software release version. The most current release is listed first with earlier releases following in descending order.

Releases of TAB FusionRMS software use the following versioning convention:

**[Version # = Major #. Minor #. Build #]**. For example,

**10.0.0001**. This document applies to all FusionRMS product editions:

- Essential
- Physical Recordkeeping
- Electronic Recordkeeping
- Enterprise

**Table 1: Version control**

Version	Date
10.0	March 19, 2017

## New features in 10.0

This section contains information related to new features introduced in the 10.0 release.

### Web Access client

In version 10.0, the new 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. Here is a summary of the major changes:

- 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
- Hidable Task Pane and tracking panels 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

#### Functions

- Multiple holds can be applied to a single record

### Technology

With version 10.0, .Net 3.5 is no longer required for customer 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
- Retrieve database items based on barcode
- Read barcodes using your device's built-in camera
- Download attachments
- Request and transfer physical objects

## Changes in 10.0

Changes to the application software are listed in this section by build release with the most current release listed first and prior releases listed in descending order.

Releases of TAB FusionRMS software use the following versioning convention:

**[Version # = Major #. Minor #. Build #]**. For example, **10.0.0001**.

### Build 15xx

TAB FusionRMS maintenance release 10.0.15xx includes the following enhancements and resolved issues:

1. **FUS-1696 [Issue] [Web Access] When transferring a record to an employee, the default due back date is not kept.**
2. **FUS-1723 [Issue] [Web Access] In Google Chrome and Microsoft Edge browser "Retention Information" page does not open when user clicks on "Retention Info" link**
3. **FUS-1894 [Enhancement] [Web Access] "Additional Tracking Field" and "Memo Field" are displayed in "Barcode Tracking"**
4. **FUS-2020 [Issue] [Web Access] Record is not transferred when the Record ID is configured to be greater than characters**
5. **FUS-1943 [Issue] [Web Access] Import and Label Manager links work when Web Access configured in IIS with Host Headers**
6. **FUS-2103 [Issue] [Desktop] [Security] With Microsoft Active Directory integration turned on, credentials are cached.**
7. **FUS-1943 [Issue] [WebAccess] Import and Label Manager will work with IIS Host Headers**
8. **FUS-1708 [Issue] [Label Manager - Admin]"Enter Label information" popup is not open when click on bar code,QR code,Database field,Insert text icon.**
9. **FUS-1887 [Issue] [Barcode Tracking] Due back days field should take precedence over Default due back days**
10. **FUS-21 [Issue] [Web Access] Reports from Views only display first page**
11. **FUS-2379 [Issue] [Web Access] User remains logged in the application even after browser is closed and PC is shut down and restarted in safari browser.**

## Known issues in 10.0

The notes in the following sections are related specifically to the 10.0 release and are not associated with any other version.

### Installation

The notes in this section 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.



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.



Ensure that Microsoft® Information Server® (IIS) that will host TAB Web Access and Microsoft® SQL Server® that will host the database are set to the same time zone.



Ensure that Microsoft® Information Server® (IIS) has static content enabled. This is enabled via Microsoft Feature mechanism IIS feature > Common HTTP Features > Static Content.

- FUS-2559 [Issue] The Datalogic Elf is not recognized in Windows 10. This issue is corrected by uninstalling and reinstalling Windows Mobile Device Center (MDC).

### System configuration

The notes in this section 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 section 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.

- **Administrative changes:** When administrative changes have been implemented using the Web Access client application’s Administrative Dashboard, those changes will not be seen by a user simultaneously running the desktop client application until the user logs out and back in. (B1033)

### End user

The notes in this section 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. (B1025)

## General notes

The notes in the following sections are related to the general TAB FusionRMS 10.0 release.

### Installation

The notes in this section 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.

- ▶ TAB FusionRMS 10.0 will upgrade systems from 9.2 and above.
- ▶ Close all other applications before installing.
- ▶ Once the installation has been started and the progress bar appears, old files will be removed. In order to use TAB FusionRMS, you must continue with the upgrade once it has begun. If you cancel before the installation is complete, you will not be able to use the application.
- ▶ If a version of Microsoft® SQL Server® is not installed on your computer, you can install this free version. Installation times vary depending on your operating system and your version of .NET Framework.
- ▶ If you have already installed Microsoft® SQL Server® prior to this installation, the default settings for the TCP/IP and Named Pipes are disabled. These will need to be enabled in order for the Database Utility or the SLIM Manager to connect to the server.

To enable TCP/IP and Named Pipes:

1. On the **Start** menu, right-click **Computer**, and then click **Manage**.
  2. Open **Services and Applications**.
  3. Open **SQL Server Configuration Manager**.
  4. Open **SQL Server Network Configuration**.
  5. Select **Protocols** for **[SQLServerInstanceName]**.
  6. Right-click both **TCP/IP** and **Named Pipes**, then click **Enable**.
  7. Stop and start the SQL Server service located in the **Administrative Tools > Services > SQL Server (SQLServerInstanceName)**.
- ▶ During the Microsoft® SQL Server® 2008 Express Edition installation, a default user name (sa) and password are created. If this installation of server is to be used in production, it is recommended that you change the password to secure access to the database.

## System configuration

The notes in this section 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.

- ▶ **Full Text Search:** If no results are returned with a search or an error appears, you may need to set the FDHOST Launcher (MSSLFDLauncher) Service Account for full-text search capabilities in the SQL Server Configuration Manager.
- ▶ **Access to SQL Conversion:** BLOB data (i.e. signatures and database images) will not convert. These images must be converted manually. Please contact Tab Software Support for assistance.

## Application configuration / administration

The notes in this section 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.

- ▶ **Custom Reports:** Custom reports will not subtotal on numeric fields. To correct this issue, remove the display mask by following these steps:
  1. Open the report in grid mode.
  2. Right-click on the column heading.
  3. Click **Print Properties**.
  4. Remove the display mask, then close the **Print Properties**.
  5. Save the report by keying: **Ctrl+L**
- ▶ **Full Text Search:** The Locator column contains question marks as part of the value. Question marks will only appear if the attachments went through OCR prior to version.

## End user

The notes in this section 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.



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.
- ▶ **Upgrades and Microsoft Connectivity icons:** TAB FusionRMS icons previously used to send documents to TAB FusionRMS may still appear on the toolbar of the connected applications. These can be removed by accessing the customization menu for each application and deleting them from the menu or toolbar. (*JIRA SME-52*)
- ▶ **SRME Error—Either BOF or EOF is True, or the current record has been deleted. Requested operation requires a current record:** A known issue with Microsoft exists with applications using a Microsoft ActiveX Data Objects (ADO) client-side cursor to insert a row into a table that has an identity column. This issue was seen on a computer with Windows Server 2008 and running TAB FusionRMS as an end user. This also might be seen on Windows Vista and Windows XP operating systems without the latest service pack. An update can be downloaded from Microsoft to resolve this problem on computers experiencing this problem. See <http://support.microsoft.com/kb/952287> for more information and update downloads.
- ▶ **Multiple windows of TAB FusionRMS:** If multiple Main Grid or Main Form windows are open, they must be closed in reverse order. If an attempt is made to close in any other order the user will be presented with a reminder pop-up.
- ▶ **Passwords:** Passwords are now 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 check-box be selected so that the user will have to create a new password during the next log in.

- ▶ **Label Printing:** After printing labels, the button focus will change from Print to the first button in the view.
- ▶ **Reports:** The Tracking Inventory report can possibly time out on large databases.
- ▶ **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 should not leave an attachment in a checked out state and then attempt to manipulate that attachment from a second computer.
- ▶ **XPS Printing:** Printing to an XPS file is allowed, but not recommended. Users will notice that the XPS print engine will not create an XPS file for some large jobs.
- ▶ **Adding Pages to Word Document Attachment:**
  1. Open the attachment in the **Attachment Viewer**.
  2. Check out the attachment, using either the file menu or the lock icon on the toolbar.
  3. Open the attachment in its native application by clicking on the document icon on the far right side of the toolbar.
  4. Add the new pages, then save.
  5. Check in the attachment, using either the file menu or the unlock icon on the toolbar.
- ▶ **Email attachment MAPI failure:** The error may reference a General MAPI failure, MSOE.DLL, or indicate that Outlook Express could not be started because it is already running. This can occur on some older versions of Outlook Express when Outlook Express is running. The error can be avoided by closing Outlook Express when emailing attachments. For users needing to keep Outlook Express open while emailing

attachments, try applying the latest service packs to Outlook Express or upgrade to the latest version of Outlook. (*JIRA DAN-563*)

- **Publishing Images with FusionRMS Snapshot:** Redactions are published. Annotations are not published.
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- **Invalid column name error:** Care should be taken by database administrators when manually removing a column from the database. This error is received when searching within a view that maps to a column which does not exist. The problem can be corrected by removing the reference to the missing column or by creating the column. (*JIRA SME-3511*)

## Best practices

The notes in the following sections are related to the general TAB FusionRMS 8.5 release and are not associated with any specific versions. These notes have been published before and are listed here since they are relevant to all installations.

### Installation

The notes in this section are recommended practices for all installations and are not necessarily 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.

- None at this time.

### System configuration

The notes in this section are recommended practices for system configuration of the application prior to 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 section are recommended practices for initial 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.
- **SL Tracked Destination:** The SL Tracked Destination field requires a significant amount of resources to generate and could slow the performance of any associated views. It is recommended that this field be used in reports only.

### End user

The notes in this section are recommended practices for 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.



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

- **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.

## 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 9.0, all connected databases will appear on the list.
- **Allow requests:** In previous versions, the Allow Requests check box in the Admin Manager > Application > Requester, enabled the request functionality for the system. This is now handled at the table level. Each table contains an Allow Requests check box.
- **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.