



TAB
fusionRMS

Release Notes - version 9.4

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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, **9.4.0001**.

This document applies to all FusionRMS product editions:

- Essential
- Physical Recordkeeping
- Electronic Recordkeeping
- Enterprise

Table 1: Version control

| Version | Date |
|----------------------------|------------------|
| 9.4.1437 (SP 5) | July 27, 2018 |
| 9.4.1437 (SP 4) | Oct 6, 2017 |
| 9.4.1437 (SP 3) | May 5, 2017 |
| 9.4.1425 (SP 2) | January 31, 2017 |
| 9.4.1411 (SP 1) | November 1, 2016 |
| 9.4.1381 (initial release) | April 30, 2016 |

New features in 9.4

This section contains information related to new features introduced in the 9.4 release.

The TAB FusionRMS 9.4 Web Access client application has been significantly enhanced from previous versions. It now incorporates many features and functions previously only available in the TAB FusionRMS desktop client application. In addition, this release also introduces and makes available for the first time our TAB FusionRMS mobile application.

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

Web client

In version 9.4, the web client application can be used to administer TAB FusionRMS from any location, using any compatible internet browser. No other software is required.

Administrative functions

- Application administration
 - Attachments
 - Auditing
 - barcode search order
 - Retention
 - Tracking
- Databases
 - Table registration
 - External databases
 - Table MAP
- Table definitions
- View definitions
- Report definitions
- Security configuration

User functions

- Black and white label designer and manager
- Data importing
- Barcode tracking

- Batch importing of metadata and attachments
- Batch requesting

Hosted deployment

With version 9.4, it is easier than ever to enjoy the benefits of a hosted deployment of TAB FusionRMS. The hosted option can be set up quickly and easily, with minimal involvement from your IT team. Plus, you'll benefit from the latest technology and avoid the extra work of managing the software yourself.

Changes in 9.4

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, **9.4.0001**.

Service Pack 5 (Build 1455)

TAB FusionRMS maintenance release 9.4.1455 includes the following enhancements and resolved issues:

1. **FUS-5238 [Web Access]** Citation legal period must allow both numeric and alphabetical characters.
2. **FUS-5209 [Web Access]** Selecting a destination in “Move To” function does not bring the selected object to the top of the list.
3. **FUS-5120 [Desktop]** The value in the data grid cell is not updated if editing metadata in the “Zoom Window”.
4. **FUS-5041 [Desktop]** Additional logging and debugging information related to the processing of child records in the Retention Destruction Report.
5. **FUS-4500 [Web Access]** Selecting a destination in “Transfer To” function does not bring the selected object to the top of the list.

Service Pack 4 (Build 1447)

TAB FusionRMS maintenance release 9.4.1447 includes the following enhancements and resolved issues:

1. **FUS-2691 [Web Access]** Modified data layer to allow up to 80 characters in TrackingHistory and TrackingStatus.TrackedTableId, LocationsId, EmployeesId, BoxesId and SLRequestor.
2. **FUS-3762 [Web Access]** Special Characters (|, -, *, /, =, ~, !, ^, <, >, (,), [,],) preventing linkscrips from working in WebAccess
3. **FUS-3804 [Web Access]** Barcode tracking sporadically displays “Invalid post back or callback argument error”
4. **FUS-3828 [Desktop]** Changing retention code properties causes overflow error.
5. **FUS-4423 [Web Access]** Linkscript "_Field" property support for variables in Web Access
6. **FUS-4481 [Desktop]** Improve fulltext search for PDF documents by adding PDF2txt into the OCR process.
7. **FUS-4534 [Desktop]** Attachment viewer does not sort attachments based on the display name setting.

Service Pack 3 (Build 1437)

TAB FusionRMS maintenance release 9.4.1437 includes the following enhancements and resolved issues:

1. **FUS-2630 [Desktop]** Memory error received when one of the Microsoft OS, April 2017 Security updates (KB4015219, KB4015220, KB4015549, KB4015550, KB4015217) is installed.

Service Pack 2 (Build 1425)

TAB FusionRMS maintenance release 9.4.1425 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.**

Service Pack 1 (Build 1411)

TAB FusionRMS maintenance release 9.4.1411 includes the following enhancements and resolved issues:

1. **FUS-1691 [Issue] [Web Access] [Records] New records having errors do not display error messages on save**

If there is an issue with a new record that causes an error when attempting to save it, the record that was previously selected is displayed instead of the error message. This is happening because after the save button is clicked:

- The data grid is refreshed and maintains the previous selected record as the active record.
- The edit pane is not refreshed which prevents the error message from being shown.

2. **FUS-1676 [Issue] [Web Access] [Records] Required fields not shown on Add Record form**

When adding a new record, the Add Record form does not show fields that are required and is not flagging any that were missed after attempting to save the record to help users identify which ones they need to enter.

3. **FUS-1664 [Issue] [Web Access] [Processing] Wrong date set for dates that do not include a time**

The method used to display dates in the local date format by parsing dates based on the language setting of the client was replaced with a custom function.

The custom function uses the `date.ToLocalTime` function and assumes a date that does not include a time is midnight and that all dates are in Universal Coordinated Time (UTC) regardless of the actual time zone setting of the client.

Time zones are expressed as positive or negative offsets from UTC; if the client is outside the UTC, the time will be set back or forward by the offset value causing dates that do not include times to be set wrong.

For example, consider the case of a UTC-7 time zone and a date of 1 November 2016. In this case, seven hours is subtracted from the UTC time (midnight) causing the date to be set the day before what was entered or used in the following:

- Transfers using a due back date.
- Requests using a delivery date.
- Queries using dates.
- Retention information.

4. FUS-1654 [Issue] [Web Access] [Attachment Viewer] Thumbnail previews for attachments not shown

When using a Google Chrome web browser, the thumbnail previews of attachments are not being shown in the Attachment Viewer if they were not previously created and cached resulting in this error:

```
"Object Reference not set to an instance of an object. Preview not Available."
```

5. FUS-1600 [Issue] [Web Access]: [Tracking] Tracking Panel shows an error and not the current tracking information about an object

When the row of an object that is tracked is selected in its view, the Tracking Panel shows an "Incorrect syntax near ', ' ." error message instead of the current tracking information for the tracked object.

6. FUS-1597 [Issue] [Web Access]: Failed to enable constraints

ADO determines constraints and if the constraints used in a database are not unique, it causes a "Failed to Enable Constraints" error. The FillData method was corrected to not automatically assign constraints and do it manually with the correct field.

7. FUS-1596 [Issue] [Web Access][Views]: Views with Tracking Location columns perform slow

Views in large databases that have tracking location columns perform slow when opened or queried; or when a record is added, modified, or deleted. Performance was improved by optimizing indexes and implementing the use of leading zeros explicitly for tracking lookups as needed.

8. FUS-1593 [Issue][Web Access]: Links need to be clicked several times before page loads

Clicking on a child or dependent hyperlink in a view causes an "Index Out Of Range" error. After the user clicks the hyperlink several times, then the page refreshes and loads.

9. FUS-1591 [Enhancement] [Web Access]: Large query Timeout setting

In some cases, queries that return large sets of information timeout before they have completed running. A setting feature has been added that allows the timeout period for queries to be adjusted to give them enough time for completion.

10. FUS-1590 [Issue] [Web Access]: TableID varchar data-type

If a varchar data-type is used with a TableID, it causes an invalid column name issue with SQL Server.

11. FUS-1586 [Issue] [Web Access]: Folder Status

Clicking the Folder Status view in the Maintenance workgroup causes the following error:

```
"An unhandled error has occurred.
The information below can be used to help diagnose the issue.
Source: .Net SqlClient Data Provider
Description: Invalid column name 'New'..."
```

12. FUS-1573 [Issue] [Web Access] [Views]: Data saved to wrong record when editing

When a new record has been created and then it is edited after it was initially saved, the changes are applied to the first record in the view instead of the new record when they are saved.

13. FUS-1571 [Issue] [Retention]: Reports cause errors if Inactivity settings are not configured for retention codes

If Inactivity has not been configured for retention codes in Retention Code Maintenance, errors will occur when attempting to access retention information provided by Retention Reports.

14. FUS-1570 [Issue] [Retention]: Records set to Legal hold when they should not

When running the Eligible for Final Disposition report from Retention Reports, the records selected by the report are all set on legal hold regardless if they should not.

15. FUS-1568 [Issue] [Objects Inventory Report]: Report errors occur when both descriptions fields are empty

If selections are not made in Field (1) and Field (2) of the table Display settings for an object that is tracked, errors will occur when running an Objects Inventory report for that tracked object.

16. FUS-1565 [Issue] [Web Access] [Tracking]: Transfers and requests perform slow with large selection lists

Improved responsiveness of transfer and request functions by limiting what is shown for large selection lists of employees and locations to one hundred each.

17. FUS-1557 [Enhancement] [Past Due Email]: Saving credentials

Changes have been made to the Past Due Email functionality that now allow the saving of credentials without having to run it first.

18. FUS-1556 [Issue] [Retention] [Certificate of Final Disposition report]: Null date slows performance

The Certificate of Final Disposition report performs slowly when it contains NULL date values.

19. FUS-1554 [Web Access]: Drop-down lookup to parent table not loading

Drop-down lookups will not load if the column order of the view for the parent table was changed using the Views module in the Admin Manager. When drilling down from the parent table, wrong values are given for lookups on new rows in the child table.

20. FUS-1551 [Issue] [Web Access]: Drill down Check String Id

If the ID of a child table is an integer data-type, errors will occur when drilling down from the parent table.

21. FUS-1550 [Enhancement] [Web Access] Conditional TABQUIK button

If TABQUIK is not integrated, the button for it will not be visible to the user.

22. FUS-1549 [Issue] [Web Access]: ViewID not passed to ScriptEngine

The ViewID for opened views with linkscript functionality are not being passed to the ScriptEngine. This will cause some linkscripts not to work.

23. FUS-1543 [Issue] [Web Access]: Exporting large datasets

Large sets of data cause an out of memory error when exported to CSV.

24. FUS-1542 [Issue] [Web Access]: Smart columns in Views not working

Lookup columns that have been set as Smart Columns in child tables, so that they won't be shown after drilling down from the parent table, are still being shown.

25. FUS-1535 [Issue] [Web Access] [Object Inventory Report]: Trackable flag, correct order, and correct permissions not used

The object Inventory report list is no longer using the Trackable flag, correct order, and correct permissions.

26. FUS-1534 [Issue][Web Access][Security]: Permissions are not working for views

Users that have not been granted security permissions to make and save changes to a view are still able to do so.

27. FUS-1530 [Issue] [Web Access]: Moving from view to view performance

If the query window is set to automatically launch when a view is opened, it takes longer to load a view from the view menu than from the Task List.

28. FUS-1529 [Enhancement] [Web Access]: Query form operators by view and field stored in cookies

The Web Access Query form now stores operators by view and field in cookies to improve usability by remembering the last one used.

29. FUS-1528 [Enhancement] [Web Access]: Attachment preview indicator

An hourglass will now be shown while the main attachment preview is loaded.

30. FUS-1455 [Enhancement] [Web Access]: Retention reports

Added equivalent desktop application Retention Report functionality.

31. FUS-760 [Issue] [Web Access]: Large attachment performance

Improved the responsiveness of the Web Image Service for handling large attachments.

32. FUS-739 [Update] [Datalogic]: Datalogic installers

Updated manifest in Datalogic installers; modified build* batch files and Wise projects to reflect new folder structure.

33. FUS-655 [Enhancement] [Web Access]: Email Notification Linkscript functionality

Added Email Notification through Linkscript functionality.

FUS-590 [Upgrade] [Web Access & Desktop]: Oracle Outside In libraries

Upgraded Oracle Outside In libraries from version 8.3 to 8.5.

34. FUS-362 [Enhancement] [Web Access]: Email Notification functionality

Added Email Notification functionality to Web Access client

35. BGZ-1178: [Enhancement [Mobile]: Email Notification functionality

Added Email Notification functionality from mobile application.

36. BGZ-1170 [Issue] [Web Access] [Administrator Dashboard]: Visual Attributes drop-down not working

The Visual Attributes drop-down functionality is not working properly in the Views module of the Admin Manager.

37. BGZ-1153 [Issue] [Web Access]: Viewer not showing attachments

HTML5 Attachment Viewer does not show attachments.

Initial release (Build 1381)

TAB FusionRMS release 9.4.1381 includes the following enhancements and issue resolutions:

1. FID-2199 [Enhancement] [Web Access]: TABQUIK integration using new MVC version

TABQUIK is now able to integrate with Fusion Web Access using the MVC version of TABQUIK.com. Both version of TABQUIK.com – the ActiveX and the MVC will continue to fully function through the integration. TABQUIK.com users that a currently using one version – will use the same version for the integration.

2. FID-2183 [Enhancement] [Security]: Compliance with the FIPS 140-2 standard

The Federal Information Processing Standard (FIPS) Publication 140-2, (FIPS PUB 140-2), is a U.S. government computer security standard used to accredit cryptographic modules. The password hash in Fusion has been modified to use a FIPS compliant SHA256 provider. Compliance is only for the desktop version of Fusion. Compliance for Web Access will be implemented in a future build.

3. FID-2058 [Enhancement] [Web Access]: Minimize Tracking and Request panes

Added functionality to Web Access to minimize Tracking and Request panes. A Show / Hide Tracking button was added to tools button section above grid.

4. FID-2190 [Issue] [Web Access] [Status bar]: Displays database name not profile name

Corrected issue where the database name was displayed in the Web Access status bar. Will now display database profile name managed in SLIM manager.

FID-1148 [Enhancement] [Web Access]: Select All check-box in Listview

Added functionality in Web Access to Select All records in a List View. A check-box is available in the row header that will Select All.

5. FID-2188 [Issue] [Retention]: Cannot increase due back date passed 365 days

Modified to use Settings Table record if it exists to calculate max due back date. Settings record format:

- **Section** = Tracking
- **Item** = MaxDueBackYears
- **ItemValue** = number of years (defaults to one if not numeric or record does not exist)

6. FID-2191 [Enhancement] [Linkscripts]: Send To cannot skip individual items; no ability to rename an

attachment

Added Linkscript ability to skip individual items:

- Modified so Outlook items can be skipped programmatically in the script engine using the methodology currently used for scanning scripts (setting `_OutputImageName` to "").

Added "RenameAttachment" action to script engine:

- `RenameAttachment <Table Name> <Table Id> <New AttachmentName>`

7. FID-2175 [Issue] [Web Access]: Scan List strip character not properly applied

Corrected issue when the table does not have a Strip Character but individual ScanList entries do, the strip character should only be applied to the field listed in the ScanList entry. Instead, it will apply the strip character when checking all fields.

8. FID-2236 [Issue] [Web Access]: Error trying to set destination bar-code with current code

Corrected issue where an error could occur when comparing a bar-code prefix that is longer than the bar-code itself.

9. FID-2174 [Issue] [Reports]: Corrected Command button and drop downs

Corrected issue with Web Access Reports where the Command button and drop downs were not functioning properly. The Command button occurs on: Batch Request, New Batches and Request Exception reports. Drop down lists occurs on: Batch Request and Pull List reports.

10. FID-2086 [Issue][Datalogic X3]: Scanning with firmware >1.02

Corrected issue introduced with firmware version >1.00 for the Datalogic X3. When scanning certain barcodes a carriage return would occur in the middle of the bar-code - causing the scan to jump to the next field. Part of the bar-code would display in the first field, the other part in the second field. This would not occur in devices using firmware <1.02.

11. FID-2038 [Issue][Datalogic]: Review button throws error for non-signed records

When reviewing records via the Review button/dialog, the Signature button is always visible (even for records where the prefix on the destination is something other than "E". Clicking on the button throws an error and the program crashes.

Signatures are typically only required for some destinations. The configuration file for %specific customer % is set for prefix "E" only so the signature dialog only comes up when transferring to an Employee.

Transferring to a Location (prefix "L") does not display the signature dialog as it is not required for locations.

1. The configuration file allows you to set for all destinations by adding all prefixes to the `<SignatureRequired>` element.
2. If prefixes are not used, you can set the `<SignatureRequired>` element to -1. This will require signatures for all destinations as well.

12. FID-1969 [Enhancement] [Datalogic] [Bar-code tracking]: Strip CR LF from data

Datalogic(s) are pre-programmed with carriage returns (CR) or line feeds (LF) when scanning. Instead of manually removing the (CR) (LF) thru the device - Fusion should remove them from the data. Data should never have those commands in their actual content.

13. FID-2157 [Issue] [Web Access] Set drop down list order

Corrected issue in Web Access where the drop down list would display in whatever order SQL would send it in. Has been changed to alphabetical. This is now the same as the rich client.

14. FID-2040 [Enhancement] [Web Access]: Default focus and taborder)

Updated the default focus and tab order throughout Web Access.

15. FID-2197 [Issue] [Attachment Viewer] Check out and open in Native app results in error

Corrected issue in the Attachment Viewer where the application could potentially hang when checking out and opening attachments in the native viewer.

16. FID-1878 [Issue] [Label Printing]: Application error from Label Setup dialog

Corrected issue so you can no longer cancel Label Setup without first closing Print Setup.

17. FID-2189 [Issue] [Views]: ViewColumns with DropDownReferenceColNum of -1 get reset to 0 when View is saved

Corrected issue so that DropDownReferenceColNum is not changed if it has been set to -1.

18. FID-2173 [Enhancement] [SDLK5.ini]: Sync to grid settings moved to registry

Moved Sync to Grid from sdlk5.ini file to user registry hive (HKEY_CURRENT_USER\Software\TAB\FusionRMS\Viewer).

19. FID-2185 [Issue] [Image Service]: PageCount field not always updated or not updated correctly

Currently the PageCount may be NULL or have the incorrect value when pages are added and the demographic information in the info panel and pop-up will show the info from the previous page when there are multiple files attached (more prevalent when multi-page files). Modified code to update the PageCount correctly and to record the correct demographic information for pages based upon the real file the page is in.



This modification will not fix existing data that is incorrect.

20. FID-2183 [Issue] [SLIM Server]: OUs with slashes(/) fail during ADsynchronization

Corrected issue where Organizational Units with slashes in their name failed during Active Directory synchronization.

21. FID-2182 [Issue] [SLIM Manager]: Browse for OU sometimes starts with blank domain

Corrected to automatically refresh the Organization Unit Browse dialog if the starting domain is changed.

22. FID-2137 [Issue] [Tracking Reports]: GetItemNames can potentially get the results of an entire table

Corrected issue with Tracking Reports, where GetItemNames could potentially get the results of an entire table, causing issues in large tables.

23. FID-2133 [Issue] [Web Access]: No items from a tracked table in the objects out report

Corrected issue when there are no items from a tracked table in the objects out report, it will pull descriptions from all items in that table.

Known issues in 9.4

The notes in the following sections are related specifically to the 9.4 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.

- None at this time.

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.

- **Label printing alignment:** Adjustments for label printing alignment must be performed in the desktop client application to support Web Access. (B1046)
- **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 9.0 release and are not associated with any specific versions.

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 9.1 will upgrade systems from 5.0 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® 2005 or 2008 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)**.
- ▶ It is recommended that you install Microsoft® SQL Server® 2008 Express Edition while logged in as the computer administrator. For Windows Vista, it is required.
 - ▶ On Windows Vista after the reboot, you may not see any indication that the installation is continuing. In the lower-right corner of your screen, look for an icon concerning applications that need approval to continue at start-up. Open this dialog, and then select the setup.exe file to allow the operation to continue.
 - ▶ If you are installing Microsoft® SQL Server® on Windows Server 2008, you must enable the PowerShell feature. For more information on Windows PowerShell, please visit Microsoft's Website.
 - ▶ During the Microsoft® SQL Server® 2008 Express Edition installation, a default user name (sa) and password (1password\$) 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.
 - ▶ During the Microsoft® SQL Server® 2008 Express Edition installation on Windows 7 or Windows Server 2008 you will receive a warning from the Program Compatibility Assistant. The warning indicates that Microsoft® SQL Server® 2008 Service Pack 1 must be installed to address compatibility issues known to Microsoft®. Select the Run-program option on the warning and the Microsoft® SQL Server® 2008 Express Edition installation will be upgraded to Service Pack 1.
 - ▶ If you are installing the Image Web Service on a 64 bit server running IIS 6, you may need to enable running 32 bit ASP.NET applications. This can be done by running IIS6on64Bit.bat in the ImageServerWebService folder located in the Extra folder. Additional information, provided by Microsoft®, can be found at <http://support.microsoft.com/kb/894435>.

System configuration

The notes in this section are related 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.

- ▶ **Full Text Search:** If no results are returned with a search or an error appears, you may need to set the FDHOST Launcher (MSSQLFDLauncher) 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.
- ▶ **Microsoft® SQL Server® Management Studio:** When opening the Microsoft SQL Server Management Studio, some users may encounter an error message concerning a file that could not be loaded (mscorlib.tlb). This is a known issue with Microsoft and is not related to TAB FusionRMS and will not affect the use of the application. Visit Microsoft's site for further details and workarounds.
- ▶ **Server and Client Side Cursor:** The Server Side Cursor is used for quick retrieval of non-editable data; for example, a lookup table. Do not use Server Side Cursor for editable tables. This can cause undesirable data results. If any View in the collection is editable, select the Client Side Cursor.
- ▶ **Microsoft® SQL Server® 2008 or 2005 Express Edition:** If you have already installed either version 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)**.

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.

- ▶ **FusionRMS Web Access:** If Display Field 1 or 2 is not configured, an error appears in the Tracking function of FusionRMS Web Access. The solution is to configure these fields by following these steps:
 1. Click **Tools > Admin Manager**.
 2. Click the **Tables** module, then select appropriate table.
 3. In the **Display** area, configure **Field (1)** or **Field (2)**.
- ▶ **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.

- ▶ **Version 8.5:** If a customer wants the question marks removed, the attachments will need to be run through OCR again. Please contact TAB Software Support for assistance.

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 supported. 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.
- ▶ **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.

- **Service Manager:** The Service Manager is an option on every TAB FusionRMS Flash Drive. Its current use is for the Inactive Records and Eligible for Destruction retention reports. If TAB FusionRMS retention is not being used, this service is not required.



If installed, this service should be on the same machine as SLIM Server.

- **SLIM Server:** If you experience trouble connecting with the SLIM Server, contact TAB Software Technical Support for assistance.
- **FusionRMS Web Access and SQL Server Primary Keys:** FusionRMS Web Access is dependent on primary keys in SQL Server® tables to return data correctly to the interface. If a primary key is not detected, the table will not appear in FusionRMS Web Access. Some databases have hooked in back-end SQL Server views to the TAB FusionRMS table schema, which will continue to work in the full application, but would cause errors in FusionRMS Web Access. You must set primary keys on SQL Server tables for them to appear in FusionRMS Web Access.

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.

System configuration and customization

Configuration

TAB defines system configuration as a process by which system functionality is created using tools that ship with the software license and that are included with every system resident in the TAB FusionRMS Administration Manager.

While configuration services are normally chargeable, end users and their administrators can be trained in the use of these tools enabling them to be independent and self-reliant for general application maintenance needs.

Within the TAB FusionRMS Administration Manager, changes can be made to the following:

- Application
 - Appearance
 - Auditing
 - Barcodes
 - Notifications
 - Requesting
 - Retention
 - Tracking
- Database
 - Structure
 - Scripting
 - Tables and views registration
- Directories
 - Image storage locations
- Tables, views and reports
 - Design
 - Capabilities
- Security
 - Users
 - Groups
 - Object Permissions

Customization

TAB defines system customization as a process by which system functionality is created using highly specialized software industry development tools and accredited software development personnel. Always chargeable, these tools and TECHNOLOGY SYSTEMS service are used to create system functionality that are unique and are not yet established in the general TAB end user population in numbers sufficient to be included in the TAB FusionRMS Administration Manager as “Configurable”.

TAB FusionRMS software developers use Microsoft development tools such as:

- .Net Framework
- SQL Server
- Visual Studio
- VB.net and ASP.net

To accomplish TAB FusionRMS Customization in the following areas:

- Component placement
- Workflow programming language called links scripting
- Database tables, views, triggers, and stored procedures