



RELEASE NOTES

RECORDS MANAGER

April 2, 2007

Version 10g Release 3 (10.1.3.3.0)

These release notes outline new and enhanced features in Records Manager version 10g Release 3 (10.1.3.3.0). In addition, they address a number of specific installation issues as well as special considerations that should be taken into account for version 10g Release 3 (10.1.3.3.0).

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NEW FEATURES AND ENHANCEMENTS

Records Manager 10g Release 3 (10.1.3.3.0) has the following new features and enhancements:

Several interface changes have been made from Version 7.1.4:

- ❖ **Changed location for retention tasks**
Retention tasks to be processed are now available on pull-down menus instead of from the Trays menu.
- ❖ **Removal of advanced screening**
Advanced screening is no longer available. That functionality has been merged into the regular screening functionality.
- ❖ **Inclusion of Simple Profiles**
The Simple Profile functionality has been bundled into the product and is available for use in this product. This allows the establishment of profiles which can be used to assist in customizing the product for site-specific usage. Default profiles have been provided to help minimize the amount of information seen on the content checkin screens.
- ❖ **Removal of dormant global triggers**
Dormant global triggers as a trigger type are no longer selectable as an option. You can create dormant global triggers by simply not adding an activation date when you create the trigger.
- ❖ **Removal of the Configure Retention Components page**
The Configure Retention Components page is no longer used to configure aspects of the retention schedule (triggers, dispositions, and so on). All functionality of that type is now available by using pull-down menus which are available throughout the product.

❖ **Editing of pre-defined link types**

You can now edit pre-defined link (related content) types. By default the main links with new content item revisions is checked. This can be changed so linking is not revision independent.

❖ **Change in screening functionality**

The interface used for screening has changed. You can now select from dropdown menus and select Boolean operators for all screening functions.

❖ **Simplified Search Capability**

Query Builder functionality is now included as part of the standard search capabilities. To access this option, select the Query Builder Form option from the Search Forms menu at the top right corner of any search page.

IMPLEMENTATION CONSIDERATIONS

The following considerations should be taken into account when implementing and using Records Manager 10g Release 3 (10.1.3.3.0):

Issue

You must restart the Content Server after importing custom metadata from older Content Server versions.

Issue

A search can be performed which returns all freezes in an unfreeze option list. The **Update—Unfreeze** option is then available and multiple items can be checked to use the unfreeze action. If you choose to unfreeze items with a freeze that is not yet applied to any of the content items, the content item does not unfreeze.

USER DOCUMENTATION

Records Manager 10gR3 comes with a comprehensive online Help system and a full set of PDF documentation.

The Help system can be accessed from the application or the file system:

- ❖ To view the Help system from the application, click on any Help link in the user interface. To see the full Help system, you need to be logged into the content server as an administrator. Otherwise you will just see the user help, which contains only a fraction of the information included in the administrator help system. (The Welcome link in the administrator online Help provides useful information on using the Help system.)

- ❖ To view the Help system from the file system, go to the *[ServerInstance_Dir]/weblayout/help directory* and start the file *wh_start.htm*. This starts the full administrator help. (The Welcome link in the online Help provides useful information on using the Help system.)

The documentation is also available as a set of PDF files, which is installed on the hard disk along with the software. A navigation menu is available to provide easy access to the documents. To open this navigation menu, start the file *[ServerInstance_Dir]/weblayout/help/documentation/start.pdf*. The full PDF documentation set is also available in the documentation distribution package for the software.



Note: The ‘Tips for Usage’ link opens a PDF document that provides useful information on using the PDF documentation set.