

Oracle® URM Release Notes

Release Notes

10g Release 3 (10.1.3.5.0)

September 2011

These release notes outline considerations in usage for this release of Universal Records Manager (URM). This information is not included in the latest documentation release.

1 What's New

Consider the following when installing and using this version of URM:

Content Server Versions Required and Supported

The 10.1.3.5.0 version of Records Manager Corporate Edition, Records Manager DoD Edition, and the Content Server Adapter requires Content Server version 10.1.3.5.0. These products are not supported for older versions of Content Server.

Interaction with Oracle Text Search

When using Oracle Text Search with Content Server, 32 optimized fields are allowed. When URM is installed, this can exceed the 32 field limit.

To accommodate this limitation, at installation the URM install process checks to verify the search engine used. If Oracle Text Search is used, URM date fields are set to be non-searchable. Because of this, URM date fields will not appear on the search pages. You can change this so fields are searchable, but make sure to stay in the 32-field limit.

If you installed URM while using Oracle Text Search and later change search engines, you can configure the date fields to be searchable by using the Content Server's Configuration Manager.

If you install URM without Oracle Text Search and later change your current search tool to Oracle Text Search, you must manually configure the date fields to be non-searchable by using the Content Server's Configuration Manager.

2 Records Manager Updates

Note the following considerations that were not included or have changed in the Records Manager DoD Edition or Corporate Edition documentation:

- Access Control Lists (ACLs) are not enabled by default in this release. If ACLs are enabled after installation, some functionality will not be fully accessible. If ACLs were enabled in a previous release, those settings remain in effect.

To enable ACLs, check the **Enable ACL Security** checkbox on the Configure Retention Administration Page. Note that the Select User Applet which is used to edit ACLs has not been evaluated for accessibility. The upload and download applets, which have also not been evaluated for accessibility, can be installed as

described in the Content Server documentation. See *Managing Security and User Access for Content Server* and *Managing System Settings and Processes* for more information.

- Screening results can now be filtered based on a user's security privileges. Set the `RmaEnablePostFilterOnScreening` configuration variable to `yes` to enable this functionality. Users will still be able to perform searches, but the user's security designation (accounts, Access Control List privileges and classification) is evaluated before the results are displayed. If search results are found that should not be displayed to a user based on the security applied to the item, the specific results are filtered out.
- All fields are now exposed on the Screening for Records query page.
- Individual users can now be designated to mark items as complete. This functionality is no longer restricted to those users who originally created the disposition for the item.
- You can now screen multiple sources when screening content and records. In prior versions, one source at a time was screened. In the current version, multiple sources can be selected and used. This functionality is also available when screening physical sources.
- The DoD Edition documentation set references a *URM DoD Install Guide*. This is an error. References should be made to the *URM Installation Guide*.
- In the description of the Retention Category Criteria Screen in the *System Setup Guide* for both editions, it is noted for **Disallow Content Delete** that "if checked, indicates the contents cannot be deleted." This should be altered to read "If checked, indicates the contents cannot be deleted from the Content Information Page unless the user has the Record.Delete right."
- The description of the `RmaNotifyReviewerAndAlternateReviewer` variable in Chapter 6 of the *Corporate Edition System Setup Guide* and Chapter 7 of the *DoD System Setup Guide* is incorrect. By default, only the alternate reviewer received email notification about the action.
- In Chapter 10 of the *Corporate Edition System Setup Guide* and Chapter 11 of the *DoD System Setup Guide*, the **Enabled** description for the Fields for Metadata Page should be **Yes** by default, not **No** as indicated in the documentation.
- Access Control Lists cannot be used if Collaboration Manager is installed or if the `UseCollaborationManager` configuration variable is set to `TRUE`.
- The Universal Records Manager Language pack mentioned in the installation instructions include translated strings for non-English languages. This information was not noted in the installation guide.
- It should be noted in the documentation that the `SHOWCREATEEXTERNALMENU` configuration variable is only to be used for debugging purposes.
- When creating a Simple Profile using Field Configurations, a checkbox will be provided for the Excluded Fields, Hidden Fields, and Uneditable Fields values when using the profile. A checkbox is also provided for the Required Fields value even though it is not necessary. This is because a checkbox is provided by default in a browser.

3 Physical Content Manager Updates

Note the following considerations that were not included in the Physical Content Manager documentation:

- You can now move storage locations within the storage hierarchy. A new **Move** option is available on storage object menus. As with other storage options, you can only move objects to logical places in the hierarchy (for example, you cannot move a warehouse into a row. You can move a row to a different room, however.) You must have the Storage.Move right to perform this action.
- You can elect to show or hide items when browsing content storage. To hide content items, set the ShowContentForStorageBrowse configuration variable to FALSE in the physicalcontentmanager.cfg file in the *install_dir/custom/PhysicalContentManager/directory*. By hiding content items, you can significantly decrease the response time when navigating through storage containers.
- The following models of Videx LaserLite wands are supported: LaserLite, LaserLitePro, and LaserLiteMX. Details about supported models were omitted from the documentation.
- Bar codes have been enhanced in two ways:
 - You can now add custom bar codes. A new option under the Configure menu on the Configure Physical Content Manager Page, **Function Bar Codes**, is used to set up bar codes with bar code numbers and descriptions designated by the records administrator. Note that transaction codes must be a numeric value from 7000 to 9999.
 - Bar code processing can be done in a batch method, as was done previously, or dynamically, as bar codes are scanned. To enable automatic dynamic processing, edit the BarcodeUtility.ini file in a text editor, setting the following configuration variables:

```
DefaultProcessSingleItem=0  
DefaultSaveTrans=0
```

Log in to the bar code wand. The Real Time Processing option appears on the bar code processing menu. Click this option and the scanner processes the data scanned after three bar codes are read (Transaction, Location and Object). Insert the results below the data collection text box.

You can also click **Save Transaction Code** and the current transaction code is left in place. The data is processed after each Location and Object scan.

3.1 Processing Non-Standard Barcode Data

A detailed knowledge of Idoc Script is required to customize the file that processes barcode data. Contact Consulting Services for more assistance if needed.

Barcode processing in PCM uses code written with Idoc script in a *processing file* to evaluate each line in a *data file*. The processing file can be modified to customize how the system parses and processes the barcode data files.

The processing file is stored in the barcode\resources directory and is named barcode_process_resource.htm.

The following is an example of a standard barcode data file:

```
H YYYYMMYYHHMMSS 00 0000000000          - Header
```

20050721125151 00 1000	- Transaction code
20050721125201 00 URMUSER	- Location
20050721125204 00 OB1	- Object to be processed
20050721125204 00 OB2	- Object to be processed
T 000	- Footer

3.1.1 Header and Footer Information

The header line in the standard data file begins with the value "H" and is ignored by the processing file. This can be customized if a header line is different or if one is absent. To modify this, change the `barcodeHeaderStartsWith` variable in the barcode environment file.

The standard footer line in the data file begins with "T 000". When the processing file encounters this notation, processing stops and the processed data is uploaded. The `barcodeFooterStartsWith` variable can be changed to indicate a different footer type.

3.1.2 Data Information

Each line in the file that is not a Header or a Footer is parsed as data. Each valid transaction must have a Transaction Code, a Location, and Items to assign to the location.

3.1.2.1 Transaction Codes Three default transaction codes are available:

- 1000: check in
- 2000: check out
- 3000: set permanent and actual locations; this can also be used as a check-in transaction.

You can also create custom Transaction Codes. If custom codes are used, the location must be set to a user, storage item or object (for example, a box, folder, or tape).

The Transaction Date (`dTransDate`) and the Transaction Type (`dTransType`, which is the code designation of 1000, 2000, 3000, or custom number) must be set in the processing file. The following values should be cleared in the processing file:

- Location Type (`dLocationType`)
- Location (`dLocation`)
- Object Type (`dExtObjectType`)
- Barcode (`dBarcode`)
- Barcode Date (`dBarcodeDate`). Dates must be in the format MM/dd/yyyy HH:MM:SS.

The following variables should be set to FALSE:

- Barcode Transaction Location (`barcodeTransLocation`)
- Barcode Item (`barcodeItemSet`)

3.1.2.2 Location The `dLocationType` and `dLocation` values must be set in order to set the location. In addition, the `barcodeTransLocation` variable must be set to TRUE. This indicates that a location has been set for the current transaction.

If the location is a user, `dLocationType` must be set to `wwUser`. If the location is a storage location, `dLocationType` must be set to `wwStorage`. If the location is an object, `dLocationType` can be left blank and the processing code will determine the object type of the object during processing.

Multiple items can be assigned to the same location with one transaction. If the value for `barcodeTransLocation` is set to `TRUE`, it is assumed that the item being processed is an object being assigned to the current location set earlier. Make sure the `barcodeItemSet` value is set to `TRUE` after each item is parsed so it is processed.

3.1.2.3 Object To set the item, set `dBarcode` and `dBarcode Date` values. Also set `barcodeItemSet` to `TRUE`. This indicates that an item is ready to be processed.

4 URM Adapter for Content Server

The following considerations pertain to the Adapter:

- If you are using the Content Server adapter, a screen depicted in the documentation may be misleading. In the Oracle Universal Records Management Adapter for Content Server Administration Guide shows a screen in section 3.3.1 with the server port set to '80'.

The port number should be the Content Server's port number, not the web server port number, which by default is set to 80. Most Content Servers would not have a port number of 80.
- All records folders and categories can be accessed via the Adapter and retention schedules can now be browsed when checking in items.
- If you create a provider using the Adapter, you should restart your content server after creating the provider.
- The Quick Help screen for the Federated Search page incorrectly points to the help page for Physical Content searching. This error will be corrected in a future documentation release.
- Installations of the Adapter on a proxied system are not supported. The Adapter is only supported on a 'master' instance.

5 Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at <http://www.fcc.gov/cgb/consumerfacts/trs.html>, and a list of phone numbers is available at <http://www.fcc.gov/cgb/dro/trsphonebk.html>.

Release Notes for Universal Records Manager, 10g Release 3 (10.1.3.5.0)

Copyright © [1996, 2009.] Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.