

Oracle® Documanage

Documanage Guide to New Features

version 6.6

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Contents of this Product Update Bulletin

As of March 31, 2009, Skywire's Documanage for Oracle is pleased to announce the general availability of Documanage version 6.6 for Microsoft Windows and Linux.

Please use the following links to navigate the document:

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Overview

This Product Bulletin has been updated for the release of Documanage version 6.6 in March, 2009. All features and enhancements are listed below, beginning with version 6.6, and ending with version 6.4, SR 2, listed in reverse chronological order. Please note Supported and Discontinued version information on page 10.

Documanage Features & Enhancements

Documanage 6.6

March 2009

Expanded Some Maximum Field Lengths

- **Cabinet Names**

Expanded from 30 characters to 64 characters for new cabinets defined with the 6.6 Administrator.

This extension required the update of client interfaces to the server, which means it is cannot be accommodated by pre-6.6 client programs, such as the 6.5 and older Workstation. In order to support continued use of older clients, including the workstation, the older interfaces have been modified to present new "long" cabinet names as truncated and ending with "...". These truncated names will show up in the older user interfaces, however they cannot be used to access the newer, longer-named cabinets.

Customers should refrain from defining new cabinet names longer than 30 characters until all necessary clients, such as Workstation users and all Documanage Bridge instances, are updated to 6.6-capable versions.

- **Document Category Names**

Expanded from 15 characters to 32 characters.

- **Document Names**

The maximum document name length is expanded from about 39 characters to 64 characters.

- **File Types (Extensions)**

Stored filename length is expanded to allow for an extension (to the right of the "dot") of up to 32 characters, expanded from the previous practical limits between 3 and 12.

- **Document and Record ID Values**

Expanded from 31 to 32 bits, making the maximum DocID and RecordID values over 4 billion, rather than just over 2 billion.

Documanager Filer Updated and Compatible with Terminal Server

- **New Version**

The print driver which underlies the Documanager Filer feature has been updated to a new version.

- **Additional Terminal Server Compatible Version**

An additional print driver version has been included which is licensed for installation on Terminal Server capable operating systems. The Documanager Clients installer will automatically determine if the Terminal Server version of the driver is required and install it instead of the non-Terminal Server version.

- **"Sticky" Settings**

A number of preference settings and directory choices are now held over between runs of the Filer.

Documanager Workstation Enhancements

- **Multiple Document E-mail and Print**

Both printing and e-mailing documents in a list now allows for multiple selections. In the case of printing, the documents are all processed with a single presentation of the Print preferences dialog. For this reason, all documents selected should be of the same orientation (landscape or portrait) and page ranges are ignored.

- **Hide Empty Folders**

An option has been added which allows users to completely hide folders in cabinet search results that do not contain documents.

"Empty" folders are returned most often when a highly discriminatory document filter is combined with a poor (or no) folder filter. The folders are still scanned by the Workstation to see if they contain documents, so the performance impact of the folders is not completely eliminated, but the user is no longer forced to potentially search through empty folders when looking for documents.

It should be noted that a highly discriminatory folder filter remains a superior plan for efficient searching.

- **Folder Notes**

Text notations may now be attached directly to folders and viewed by other users.

- **Open Folder in New Window ("Quick Query")**

This menu command opens a new cabinet window filtered to contain only the selected folder. This enhancement allows a user to focus on a single folder and its contents and eliminate all other folders in the cabinet from view.

- **Check Out to Edit Document Properties**

This menu command offers a streamlined way to edit document properties such as the Document Name. With one command, the document is checked out in place and the document properties dialog is presented. When this dialog is dismissed, the user is solicited to check the document back in, leave it checked out, or to cancel and undo the changes.

- **File Room Behavior Advancing Workflows**

When workflow projects are advanced, the File Room no longer reopens all workflow cabinets.

- **"Sticky" Settings**

A number of additional preference settings and directory choices are now held over between runs of the Workstation. This includes some annotation tool settings requested by customers.

- **Login Settings Out of POFFICE.INI**

The Workstation no longer keeps the user's last login settings in the POFFICE.INI file. These Workstation settings are now stored per user in the registry.

Administrative Folder Results Limit

Administrators may now set a limit on the maximum number of results that a folder query will return to the server. Note that this limit is a cap on the total number of folder search results (at any single folder level) that the database will return for any query. This limit is implemented in the SQL issued to the database, so it can protect the database and server from unintentionally or unreasonably large result sets from non-discriminatory search criteria.

Administrators using this feature should note that an unreasonably low limit may result in users being unable to retrieve all of the required result folders from the database and may make some folders inaccessible. Users issuing queries generating results that exceed this size limit will be notified they have hit this limit when the last available record is retrieved. Initial result counts will include all records meeting their criteria, but the actual rows returned will be limited when they are retrieved.

Checked-out Document Reassignment

If a user name is deleted from the authentication system, documents checked-out to that user name cannot be checked back in (or the check-out undone), because the user can no longer log in to do so. This feature has been added to the Administrator program and allows the Administrator to solve this problem by reassigning the checked out documents to another user name. That user may then log in to the system and undo the check out of the documents or continue working with them.

Note that Administrative undo of the checkout is not supported. The server need not be running during Administration and the Administrator program, unlike the server, may not have necessary access to document storage volumes.

Server Running in Virtual Environments

Server timing logic has been redesigned to accommodate running in virtualization environments where the virtual system's time-of-day clock may be unreliable over isolated intervals (e.g., may jump unexpectedly backward and forward.) Prior to this change, such jumps may have caused user sessions to be prematurely timed-out and disconnected.

ART Annotation Format Deprecated

The capability to retrieve or render old ART-format annotations has been deprecated and removed from the server. No new annotations have been generated in this format since server release 6.0 in 2002. Since then, new annotations have been created in "ANO" format by the 6.0 Workstation annotation tools and any existing ART annotations have been automatically and permanently converted to ANO format when viewed.

Miscellaneous Performance and Efficiency Improvements

Several performance improvements have been implemented which will benefit users of the Dmg_API library, such as the Documanage Bridge:

- 1 Dmg_API only requests user display names from the server if requested by the client application.

- 2 The locked for annotation per-document is no longer retrieved by default.

Documanager 6.5 SR1

January 2008

Web Workflow Designer

Workflow administrators using the new Web Workflow Designer can now clear and/or disable the logging panel in the Designer if this is affecting performance.

Administrator module

■ **Retention Management**

Retention Management setup now includes an interface to set a task startup time, and the ability to disable the task. A warning label is set on the Categories Retention tab if the Retention Management Task is disabled. If the Retention Management Task is disabled and one or more categories has retention management enabled, a warning dialog is posted.

■ **Database tables**

- Documanager no longer allows modifications to the structure of tables that were *not* created in the Administrator (ie, existing business tables that are power-mapped to Documanager).
- Documanager has improved error messages upon attempting to save a table that does not have folder keys defined.
- The process of creating Business Tables in the Administrator using Sybase databases has been fixed.

Documanager 6.5

September 2007

Lightweight Directory Access Protocol Plugin

The Lightweight Directory Access Protocol, or LDAP, queries and modifies directory services running over a TCP/IP network. Documanager's set of LDAP plugins supplies an optional interface between a Documanager server and an LDAP server. This allows the Documanager server to use data from an LDAP server to authenticate and authorize Documanager users. Please see "Appendix H: LDAP Authentication and Authorization" on page 293 in the Administrator's Guide for further information.

Database Wizard

A more robust and easier to use Documanager Database (DB) Wizard has been supplied as a part of this release. The DB Wizard sets up the Documanager housekeeping tables. You select the target database (DBMS) and the wizard guides you through a series of options. Based upon the options you select, the wizard produces a table generation script that creates the Documanager database and housekeeping tables, along with a DSN connection. You can review the script before it is executed. The new version of the DB Wizard supports the MySQL, Microsoft SQL Server, Oracle, and Sybase ASE database management systems.

Categories by Cabinet

With Category by Cabinet, the administrator can configure a cabinet to restrict the document types imported into it. When an end user imports a document into a cabinet, or edits the properties of a document, the list of categories to choose from will include only categories valid for the cabinet.

Different Workstation cabinets can be dedicated to displaying different categories of documents. For example, claim documents can go into a “Claims” cabinet while policy documents can go into a “Policies” cabinet. Using this arrangement gives end users immediate feedback if they are importing a document into the wrong cabinet. For example, if a user is importing a policy into the “Claims” cabinet, the “Policy” category will not be available, alerting the user to cancel the operation and switch to the correct cabinet.

Web Workflow Designer

The Web Workflow Designer allows you to use a Web browser to design a workflow template which contains the steps needed to route documents between a pre-defined series of destinations (i.e., people or departments) in an organization for a particular project.

A workflow template contains tasks and links which define the steps needed to route documents. A task is a destination where folders are routed to or from. A link is the connection from one task to another. A folder, and the document within it, is processed by advancing it from task to task along links that connect them together.

The Web Workflow Designer also features Task Containers, for grouping and working with like tasks, and the Checkout feature, which allows editing of an existing, released workflow. Please see “Web Workflow Designer” on page 139 of the Administrator’s Guide for more information.

Documanager Workstation

- **Time and date format localization in Documanager Workstation**

Changes all controls and Workstation interfaces to adhere to Windows settings for “Regional and Language Options” regarding date formats.

- **Multi-level Query by Example**

Allows user to query on all levels of a multi-level Cabinet.

- **WIA scanning**

Supports Windows Image Acquisition API’s for using scanners in both Windows XP and W2000.

Workflow Daemon on Linux

The Workflow Daemon task is now available on Linux operating systems.

DB Scan utility

The DBScan Utility is a diagnostic and preventive-maintenance tool for administrators to run a selected battery of tests against their Documanager database and file systems. The utility can perform an array of consistency checks on both the Documanager housekeeping data and the stored document files. The administrator can choose which tests to run and then review the reports if any failures occur. The utility accesses both the database and filing systems directly and should therefore be run on the Documanager Server computer to assure all necessary network and file system connections are available.

Documanager 6.4 SR6

July 2006 (Windows only)

Retention Management with Network Attached Storage from EMC

Documanager Retention Management allows users to store document versions on third-party file servers which provide write-once read-many (WORM)-like storage that is time-limited. Organizations use Documanager’s Retention Management capabilities to automate the implementation of policies for retaining and deleting document versions.

In addition to managing the retention of document versions on NTFS, SNAP, VLAM, and BLOB storage volumes, Documange can manage the retention of documents on Centera file servers from EMC Corporation using the new *dmgemcc* plug-in. *This is currently available for Windows only.* For more information on the *dmgemcc* plug-in, refer to “Using the *dmgemcc* plug-in for storage” in the Administrator’s Guide.

COM Invocation Interface

Programmers can now give Workstation users a way to select documents and pass them to a custom component using the COM Invocation Interface. The interface provides a menu option that instantiates a COM object and passes information about the current connection, cabinet, and the documents that users have selected. The interface can run the COM object in process or out-of-process. For more information, refer to “Appendix A: COM Invocation Interface” in the Programmer’s Guide.

Viewing Acrobat Documents with the Workstation Viewer

You can now view—but not annotate—Acrobat documents from within the Documange Workstation if an Adobe Acrobat application is installed on your computer. In earlier versions of the Workstation, the Acrobat application independently displayed the Acrobat document when the application was invoked by the Viewer.

Documange 6.4 SR5

June 2006

Retention Management

Retention Management keeps users from altering or deleting documents by putting automatic controls on how long documents will be retained and when they will be deleted. Organizations use Retention Management to implement policies for retaining document versions. Such policies can require deleting document versions when they are no longer required.

Documange Retention Management now allows users to store document versions on third-party file servers which provide write-once read-many (WORM)-like storage that is time-limited. These servers provide secure protection for document versions, making it almost impossible to delete documents, even with an account that has administrative privileges.

In addition, Documange can now manage the retention of files on NTFS, SNAP, VLAM, and BLOB storage volumes, but without the security features provided by WORM-like third-party file servers.

■ **Setting Retention Options in the Administrator**

A Retention tab in the Category dialog in the Documange Administrator application allows an administrator to set retention options for each document category. These options cannot be changed by Workstation users. Retention Management options specify how long the Documange Server will keep a document version under retention management, and how the retention status of the document version will be evaluated at the end of the retention period. Document versions in a category can be retained for a set time interval after they are imported into the system, until a specific fixed date, or forever.

Retention options are applied to a document version when it is imported into Documange and at its review time. A review time occurs when (and if) a document version's retention period ends. At review time, the Documange Server automatically reviews the options that currently apply to the category for the document version and then applies the current retention options for the document's category. Review time rules can cause a document version to be:

- retained forever, or until a later date;
 - released from retention management to a normal (un-retained) status;
 - or deleted.
- SnapLock support for storage and Retention Management

Documange provides an option for storing document data on NearStore(R) Network Attached Storage (NAS) systems provided by Network Appliance, Inc. Those systems may include an optional software component called SnapLock(TM). A document stored by Documange server on NearStore with SnapLock cannot be deleted, even by use of a superuser account outside of Documange, prior to the specified expiration date for the document.

A storage plugin from Skywire, *dmgsnap*, interfaces Documange to a NearStore NAS system with SnapLock. The Documange storage type corresponding to the *dmgsnap* plugin and the NearStore with SnapLock product line is SNAP. Please see "Using the *dmgsnap* plugin for storage" on page 63 of the Administrator's Guide for more information.

■ **Setting Retention Dates in the Workstation**

Workstation users can now use a *Retention* tab in the Workstation's *Document Properties* dialog to determine the Document Protection Status of a document and to set its *Retention Review Date*.

Subdirectory Storage

When previous versions of Documange added more documents to a storage volume, overhead increased, and document access times slowed. The new document storage system implemented in Service Release 5 automatically allocates files to multiple subdirectories on a logical volume and avoids putting too many files or subdirectories in a single directory. It increases document access speeds by minimizing the increase in overhead as the number of documents in storage increases.

Multiple Annotation Volumes

Previous releases supported multiple storage volumes for document files, with annotation files stored in a single volume. Volumes for document files are allotted per Document Category using Documange Administrator. There were two types of volumes for document files—Temporary volumes that stored checked-out document files, and Permanent volumes that stored permanent documents. With this release, Documange supports multiple annotation volumes for each Document Category by adding an Annotation volume type in the Categories dialog in Documange Administrator. If a Document category is not assigned any annotation volume, the documents in that Document category will use the default annotation volume to store their annotation files.

Grouping Documents in the Workstation's Cabinet Tree View

In SR5, the Workstation Cabinet Tree can group documents by Category, Sub-Category, or Author. The selected document grouping is saved when the cabinet definition is stored as a Favorite.

ID Caching

Documange storage now includes ID caching, where document archiving performance is improved by servers caching multiple Document ID values, rather than obtaining them one at a time from the database. This improves archiving speed by significantly reducing the database operations required and eliminating a point of contention between concurrent archiving operations. ID Caching improves performance by accelerating document storage.

Nulls

Documange can now output SQL NULLs to the document property data fields in customer line of business database tables. Earlier versions translated NULL values in customer database fields to empty strings for character fields and to zero (0) for numeric fields. As a result, when it updated a customer database row containing NULL values, it changed any fields that it read as NULL to an empty string or zero.

The Documange API includes a new function, **DmgAPITranslateNullProperties** and **two modified functions**: **DmgPropertyGetValue** and **DmgPropertySetValue**. The **DmgAPITranslateNullProperties** function determines how the **DmgPropertyGetValue** function outputs NULL extended properties for a document, folder or project from the Documange database. It determines whether **DmgPropertyGetValue** translates NULLs from a database to empty strings or to zero or whether it returns NULLs. **The DmgPropertySetValue function sets the value of a customer database field. Depending on how it is called, the function sets NULL values to NULL, or to an empty string or zero.**

The Documange controls include new *TranslateNullProperties* flags in the Document, Folder and Project controls. These flags specify whether their respective controls translate NULL values in the customer database into empty strings or zeroes before returning them as Variants to the user using the Values property and GetValueByTitle method.

Database Connections

Documange does not connect to a database until it needs a connection. Documange much more consistently detects failed database connections and then re-establishes those connections.

Logging

This service release includes improvements to logging.

- **Diagnostic Records**

When it reports an SQL error, Documange now logs all of the SQL diagnostic records; previously it only logged the first diagnostic record.

- **Number of Configured Connections**

For each Data Source Name, Documange logs how many connections it has been configured to use.

- **High water-mark Connection Usage**

Documange now logs high water marks for every Data Source Name, not just the highest, and produces a high water mark log entry whenever a server instance is shutting down rather than just when the whole program shuts down.

Documange 6.4 SR3

March 2006

Program Improvements

Numerous changes included in this service release improve the:

- robustness of the connections between Documange Server instances and their database(s).
- handling of user accounts with larger lists of group memberships, ones which may exceed several kilobytes.
- rate at which Documange can import documents into its data store.
- rate at which Documange can search for documents.

This service release shortens the time it takes to start a server instance, especially one that uses a database management system like IBM DB2 MVS. It also resolves issues that occur when the temporary storage area used for import operations becomes full.

Documange Filer

The Documange Filer (DmgFiler) utility makes it simple to file documents directly into Documange from any Windows application that can send files to a printer. Windows applications generate TIFF and PDF files using a print driver supplied with the DmgFiler. The Filer then opens a dialog that you use to send these files directly into the Documange document store. DmgFiler can be installed from the Documange Clients installer, which is documented in the *Documange Installation Guide*. Refer to the Documange Filer appendix in the *Documange Workstation Guide* for information on how to set up and use the Filer.

Documange 6.4 SR2

July 2005

Renditions

Using Documange, you can now group document versions with the same content but different formats into sets called Renditions. You can then use these files with several applications, each of which refers to one file in the set.

Administration

- **Authorities for Renditions:** From the Administrator application, a Group can be authorized to use renditions.
- **Enhanced NTFS Storage Plugin:** The NTFS storage plug-in can now write a detailed log of its activity and its errors.
- **VLAM Storage Plugin:** Skywire's proprietary Virtual Library Access Method (VLAM) storage plug-in now supports Commcommander 2.0 and 2.1.
- **Volume Duplication Check:** To keep data from being lost because of storage duplication, the Documange Server now performs the Volume Duplication Check as it starts up.

API

- **Renditions interface:** A new Rendition handle and six associated function calls allow external applications to handle renditions via the API.
- **Dmg_api profile management:** A new cross platform command-line utility manages client-side profiles for the Documange API. The dmprofile utility creates, modifies, deletes, lists, imports, exports and displays the properties of client-side profiles.

- **Detecting File Content Changes:** The Documanager server signals these changes to client applications via properties in the Documanager API and in the Document Control. Two new document properties keep track of these changes—the ContentsTag and AnoAnnotationsTag.

Linux OS Support

Documanager now runs on Red Hat Linux Advanced Enterprise Server, versions 2.1, 3, and 4, SUSE Linux 9.3 and similar Linux kernel systems. The Linux installer now includes the Free DCE library with modifications that allow Documanager 6.4 SR2 to run with these versions of Linux.

Product Documentation

The following documentation has been prepared for this version of Documanager:

- *Documanager Workstation 6.6*
- *Documanager Workstation Help*
- *Documanager Administrator's Guide 6.6*
- *Documanager Programmer's Guide 6.6*
- *Documanager Database Administrator's Guide 6.6*
- *Documanager API Help*

Supported and Discontinued Version/Release/Level Notification

Supported Versions/Releases/Levels

- Documanager 6.5.x (Windows and Linux)
- Documanager 6.4 SR5 (Sun Solaris and AIX)

Discontinued Versions/Releases/Levels

Support for all releases prior to Documanager 6.4 SR 5 has been discontinued.

Discontinuances Notice

Support for all Documanager 6.4 SR 5 releases, (all versions) will be discontinued on March 31, 2009.