

Oracle® URM Release Notes

Release Notes

10g Release 3 (10.1.3.5.0)

July 2009

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.

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.

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.

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