



**Hewlett Packard**  
Enterprise

# HPE Records Manager

Software Version: 8.3

## Specifications and Limitations

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# Specifications

## Introduction

Hewlett Packard Enterprise Development LP (HPE) Records Manager contains powerful and useful functions for electronic document and records management.

Because HPE Records Manager can and should be configured in a number of ways depending on your requirements, the functions have been designed to be flexible without compromising rigorous document and records management standards.

Please note that HPE Records Manager is designed to operate within the parameters of sound information management principles and that attempts to extend HPE Records Manager beyond these parameters will adversely affect its implementation. .

## Recommended minimum requirements

### Main applications

#### HPE Records Manager client (32-bit)

| Component  | Requirement  |
|--|--|
| Operating system                                 | Windows 7 SP1 (32-bit) Professional or Enterprise<br>Windows 8 (32-bit) Professional or Enterprise<br>Windows 8.1 (32-bit) Professional or Enterprise<br>Windows 10 (32-bit) Professional or Enterprise                |
| Processor  | Business class processor   |
| Memory   | 1 GB RAM   |
| Disk space                                       | 1 GB free space  |
| Display  | Graphics device capable of displaying a resolution of 1280 x 768 or higher   |
| Installation prerequisites for .msi installation | From the HPE Records Manager installation media: Visual Studio runtimes <b>VS_Runtimes_x86.msi</b><br>Available for download:<br><a href="#">Windows installer 4.5</a><br><a href="#">Microsoft .NET Framework 4.5</a> |

For Web Client requirements, see [HPE Records Manager Web Client Browser Support](#).

### HPE Records Manager client (64-bit)

| Component  | Requirement  |
|--|--|
| Operating system                                 | Windows 7 SP1 (64-bit) Professional or Enterprise<br>Windows 8 (64-bit) Professional or Enterprise<br>Windows 8.1 (64-bit) Professional or Enterprise<br>Windows 10 (64-bit) Professional or Enterprise                |
| Processor  | Business class processor   |
| Memory   | 1 GB RAM   |
| Disk space                                       | 1 GB free space  |
| Display  | Graphics device capable of displaying a resolution of 1280 x 768 or higher   |
| Installation prerequisites for .msi installation | From the HPE Records Manager installation media: Visual Studio runtimes <b>VS_Runtimes_x64.msi</b><br>Available for download:<br><a href="#">Windows installer 4.5</a><br><a href="#">Microsoft .NET Framework 4.5</a> |

For Web Client requirements, see [HPE Records Manager Web Client Browser Support](#).



## HPE Records Manager Workgroup Server(64-bit)

An HPE Records Manager implementation must have at least one HPE Records Manager Workgroup Server, but may have several depending on the number of HPE Records Manager clients and their geographical distribution.

| Component  | Requirement   |
|--|---|
| Operating system                                 | Windows Server 2008 R2 SP1 (64-bit)<br>Windows Server 2012 (64-bit)<br>Windows Server 2012 R2 (64-bit)  |
| Processor  | Business class server processor   |
| Memory   | 4GB RAM or greater  |
| Disk space                                       | 1GB free space for installation<br>Sufficient space to manage stores and logs   |
| Display  | Graphics device capable of displaying a resolution of 1280 x 768 or higher  |
| Installation prerequisites for .msi installation | From the HPE Records Manager installation media:<br>Visual C++ 2005 SP1 Redistributable Package <b>vcredist_x64.exe</b> Visual Studio runtimes <b>VS_Runtimes_x64.msi</b><br>Available for download:<br><a href="#">Windows installer 4.5</a><br><a href="#">Microsoft .NET Framework 4.5</a> |

## Peripheral applications

HP Records Manager comes with a number of peripheral applications, which you can choose to install during client or server installation, or you may need to use one of the separate .msi files from the installation media.

Some of these have additional requirements.

### HPE Records Manager Web Client Server (64-bit)

| Component   | Requirement   |
|---|---|
| Operating system  | Windows Server 2008 R2 SP1 (64-bit)<br>Windows 2012 Server (64-bit)<br>Windows 2012 Server R2 (64-bit)                      |
| Microsoft Internet Information Services (IIS) Version 7.5, 8.0 or 8.5 | For IIS 7.5: Windows Server 2008 R2 SP1 (64-bit)<br>For IIS 8.0: Windows Server 2012<br>For IIS 8.5: Windows Server 2012 R2 |
| HPE Records Manager   | HPE Records Manager Workgroup Server  |
| Installation prerequisite   | Microsoft .NET Framework 4.5  |

### HPE Records Manager Web Client Browser Support

| Component  | Requirement   |
|------------|---|
| Browser    | Google Chrome 46.0.2490.80<br>Microsoft Internet Explorer versions 10, 11<br>Mozilla Firefox 42.0 |
| Smartphone | iPhone/iOS 7.0 running Google Chrome 35.0.1916.38   |
| Tablet     | iPad/iOS 7.0 running Google Chrome 35.0.1916.38   |

**Note:** The Microsoft Edge browser introduced in Windows 10 is NOT supported.

## HPE Records Manager for SharePoint (64-bit)

### SharePoint 2010

| Component                  | Requirement  |
|----------------------------|--|
| SharePoint version         | SharePoint 2010 SP1  |
| Operating system           | Windows Server 2008 R2 SP1 (64-bit)  |
| Microsoft Office           | Any version supported by SharePoint 2010 SP1   |
| Installation prerequisites | HPE Records Manager Workgroup Server on each SharePoint Web Front End Server and SharePoint Application Server |

### SharePoint Online

| Component          | Requirement                                |
|--------------------|--|
| SharePoint version | SharePoint Online standard                 |
| Microsoft Office   | Any version supported by SharePoint Online |
| Browser            | Internet Explorer 10 or 11                 |

**Note:** The Microsoft Edge browser introduced in Windows 10 is NOT supported.

### SharePoint 2013 on premise

| Component          | Requirement   |
|--------------------|---|
| SharePoint version | SharePoint 2013 SP1                                   |
| Operating system   | Any operating system supported by SharePoint 2013 SP1 |
| Microsoft Office   | Any version supported by SharePoint 2013 SP1          |
| Browser            | Internet Explorer 10 or 11                            |

**Note:** The Microsoft Edge browser introduced in Windows 10 is NOT Supported

### HPE Records Manager Servers in support of SharePoint 2013

| Component            | Requirement  |
|----------------------|--|
| Operating System     | Windows Server 2012 (64-bit)<br>Windows Server 2012 R2 (64-bit)  |
| Ancillary components | HPE Records Manager Workgroup Server<br>An SQL Server instance must be available on the same or a remote computer.<br>Supported versions:<br>— SQL Server 2012<br>— SQL Server 2012 R2<br>— SQL Server 2012 Express<br>— SQL Server 2014 |

### HPE Records Manager Service API

| Component   | Requirement  |
|---|--|
| Operating system  | Windows Server 2008 R2 SP1 (64-bit)<br>Windows Server 2012 (64-bit)<br>Windows Server 2012 R2 (64-bit)   |
| Microsoft Internet Information Services (IIS) version 7.5, 8.0 or 8.5 | For IIS 7.5: Windows Server 2008 R2 SP1 (64-bit)<br>For IIS 8.0: Windows Server 2012 (64-bit)<br>For IIS 8.5: Windows Server 2012 R2 (64-bit)  |
| Installation prerequisites for .msi installation                      | From the HPE Records Manager installation media:<br>Visual C++ 2005 SP1 Redistributable Package <b>vc redistrib_x64.exe</b><br>Visual Studio runtimes <b>VS_Runtimes_x64.msi</b><br>Available for download:<br>Windows installer 4.5<br>Microsoft .NET Framework 4.5 |

For Web Client requirements, see HPE Records Manager Web Client Browser Support.

### HPE Records Manager WebDrawer (64-bit)

| Component   | Requirement   |
|---|---|
| Operating System Support  | Windows Server 2008 R2 SP1 (64-bit)<br>Windows Server 2012 (64-bit)<br>Windows Server 2012 R2 (64-bit)  |
| Microsoft Internet Information Services (IIS) version 7.5, 8.0 or 8.5 | For IIS 7.5: Windows Server 2008 R2 SP1<br>For IIS 8.0: Windows Server 2012<br>For IIS 8.5: Windows Server 2012 R2<br>Role <b>IIS Management</b> selected |
| Prerequisites   | HPE Records Manager Workgroup Server must be installed with this application<br>Microsoft .NET Framework 4.5  |

### HPE Records Manager Web Service

| Component   | Requirement  |
|---|--|
| Operating system  | Windows Server 2008 R2 SP1 (64-bit)  |
| Microsoft Internet Information Services (IIS) Version 7.5 | For IIS 7.5: Windows Server 2008 R2 SP1 (64-bit)   |
| Installation prerequisites                                | Available for download:<br>Microsoft Web Service Extensions 3.0<br>Microsoft .NET Framework 4.5  |
| Note  | The HPE Records Manager Web Service is included for backward compatibility only. The HPE Records Manager Service API is the new web service interface of choice and will be kept up to date with future feature and platform support developments. |

For Web Client requirements, see [HPE Records Manager Web Client Browser Support](#).

## HPE Records Manager Render (64-bit)

| Component        | Requirement  |
|------------------|--|
| Operating system | Windows Server 2008 R2 SP1 (64-bit)<br>Windows Server 2012 (64-bit)<br>Windows Server 2012 R2 (64-bit)**<br><b>** Please see HPE Records Manager Render for further information about HPE Records Manager Render on Windows Server 2012.</b> |
| Prerequisites    | HPE Records Manager Workgroup Server must be installed with Render Onstream printer files, which install with Render when using <b>Setup_HPE_RM_x64.exe</b>  |

## Integrations

HP Records Manager integrates with a number of applications, which you can choose to install during client or server installation, or you may need to use one of the separate .msi files from the installation media.

Some of these have additional requirements.

## HPE Records Manager Thin Office and Outlook integration

| Component                 | Requirement  |
|---------------------------|--|
| Operating system          | Same as HPE Records Manager 32-bit or 64-bit client              |
| Microsoft Office support  | Office 2013 (32-bit or 64-bit)<br>Office 2016 (32-bit or 64-bit) |
| Installation prerequisite | HPE Records Manager Web Client Server                            |

### HPE Records Manager Office integration by client add-in

| Component                 | Requirement   |
|---------------------------|---|
| Operating system          | Same as HPE Records Manager 32-bit or 64-bit client   |
| Microsoft Office support  | Office 2007 SP3 (32-bit)<br>Office 2010 SP2 (32-bit or 64-bit)<br>Office 2013 (32-bit or 64-bit)<br>Office 365 (Full, installed Office on PC, 32-bit or 64-bit)<br>Office 2016 (32-bit or 64-bit)<br>With a 32-bit version of HPE Records Manager client, you must run a 32-bit version of Microsoft Office<br>With a 64-bit version of HPE Records Manager client, you must run a 64-bit version of Microsoft Office<br>You can run 32-bit versions of HPE Records Manager on supported 64-bit operating systems, and then integrate with 32-bit Office as supported by Microsoft. |
| Installation prerequisite | HPE Records Manager client (32-bit or 64-bit)   |

### HPE Records Manager ExchangeLink email integration

| Component                 | Requirement   |
|---------------------------|---|
| Microsoft Exchange Server | Exchange Online<br>Exchange 2010 SP3<br>Exchange 2013 SP1 |

### HPE Records Manager Lotus Notes integration by client add-in (32-bit)

| Component                 | Requirement   |
|---------------------------|---|
| Operating system          | Windows 7 SP1 (32-bit) Professional or Enterprise<br>Windows 8 (32-bit) Professional or Enterprise<br>Windows 8.1 (32-bit) Professional or Enterprise<br>Windows 10 (32-bit) Professional or Enterprise |
| Lotus Notes support       | Version 8.5.3<br>IBM Notes 9.0.1  |
| Installation prerequisite | HPE Records Manager client (32-bit)   |

### HPE Records Manager Lotus Notes Thin Domino Service (32-bit)

| Component                 | Requirement  |
|---------------------------|--|
| Operating system          | Windows Server 2008 SP2 (32-bit)                             |
| Domino Server             | Version 8.5.3<br>IBM Domino Server 9.0.1                     |
| Installation prerequisite | HPE Records Manager core system libraries or client (32-bit) |

### HPE Records Manager Lotus Notes Thin Domino Service (64-bit)

| Component                 | Requirement  |
|---------------------------|--|
| Operating system          | Windows Server 2008 R2 SP1<br>Windows 2012<br>Windows Server 2012 R2 |
| Domino Server support     | Version 8.5.3<br>IBM Domino Server 9.0.1                             |
| Installation prerequisite | HPE Records Manager Workgroup Server                                 |



### HPE Records Manager SAP integration (64-bit)

| Component        | Requirement  |
|------------------|--|
| Operating system | Windows Server 2008 R2 SP1 (64-bit)<br>Windows Server 2012 (64-bit)<br>Windows Server 2012 R2 (64-bit) |
| SAP support      | KGS Content Server 4.0.5   |
| Prerequisites    | Tomcat 6.0.30<br>HPE Records Manager Workgroup Server  |

### HPE Records Manager Kofax integration (32-bit)

| Component             | Requirement  |
|-----------------------|--|
| Operating system      | Windows 8.1 (32-bit) Professional or Enterprise                  |
| Kofax Capture support | Version 10.1.0 R2  |
| Prerequisites         | HPE Records Manager client (32-bit) Microsoft .NET Framework 3.5 |

### HPE Records Manager Iron Mountain and oneilbridge Warehouse integration (64-bit)

| Component        | Requirement   |
|------------------|---|
| Operating system | Windows 7 SP1 (64-bit) Professional or Enterprise<br>Windows 8 (64-bit) Professional or Enterprise<br>Windows 8.1 (64-bit) Professional or Enterprise<br>Windows 10 (64-bit) Professional or Enterprise |
| Prerequisites    | HPE Records Manager core libraries installed using <b>Setup_HPE_RM_x64.exe</b>  |

### HPE Records Manager IDOL integration

| Component  | Requirement   |
|--|---|
| Operating system                                     | Windows Server 2008 R2 SP1<br>Windows 2012 Server<br>Windows 2012 Server R2   |
| IDOL support   | IDOL 10.11 Enterprise or OEM<br>HPE Records Manager 8.3 uses IDOL 10.11 OEM for the following HPE Records Manager features:<br>— Document content indexing<br>— Optical Character Recognition (by using IDOL Image Server)<br>— Auto Classification (by using IDOL Automatic Categorization)<br>Older versions of IDOL Enterprise are supported on principle, but they may not support the above HPE Records Manager features - please check with your local IDOL support organization. |
| Supported file formats for document content indexing | Please contact your local support organization for more information about the supported formats for document content indexing.  |
| Prerequisite   | HPE Records Manager client (64-bit)   |

### HPE Records Manager ControlPoint integration (64-bit)

| Component            | Requirement  |
|----------------------|--|
| Operating system     | Windows Server 2008 R2 SP1 (64-bit)<br>Windows 2012 Server (64-bit)<br>Windows 2012 Server R2 (64-bit) |
| ControlPoint support | Version 4.11 or later  |
| Prerequisites        | HPE Records Manager client (64-bit)  |

### EMC Centera integration

| Component                  | Requirement  |
|----------------------------|--|
| Operating system           | Windows Server 2008 R2 SP1 (64-bit)<br>Windows 2012 Server (64-bit)<br>Windows 2012 Server R2 (64-bit) |
| EMC Centera support        | Version 3.3 or later   |
| Installation prerequisites | HP Records Manager client (64-bit)   |

### Structured Records Management Solution (SRMS) (32-bit)

| Component                  | Requirement   |
|----------------------------|---|
| Operating system           | Windows 7 SP1 (32-bit) Professional or Enterprise<br>Windows 8 (32-bit) Professional or Enterprise<br>Windows 8.1 (32-bit) Professional or Enterprise<br>Windows 10 (64-bit) Professional or Enterprise |
| SRMS support               | SDM 7.12  |
| Installation prerequisites | HPE Records Manager client (32-bit)   |

**Note:** For more information about the Structured Records Management Solution (SRMS) integration, please contact HPE Software Support.

### Structured Records Management Solution (SRMS) integration (64-bit)

| Component                  | Requirement  |
|----------------------------|--|
| Operating system           | Windows Server 2008 R2 SP1 (64-bit)<br>Windows 2012 Server (64-bit)<br>Windows 2012 Server R2 (64-bit) |
| SRMS support               | SDM 7.12   |
| Installation prerequisites | HP Records Manager Workgroup Server (64-bit)   |

### HPE Records Manager document viewer supported file formats

HPE Records Manager 8.3 uses HPE KeyView 10.24

Please contact your local support organization for information about the supported formats.

## HPE Records Manager for demonstrations

- You must have administrator or elevated access rights for the target computer to install HPE Records Manager.
- Microsoft SQL Server 2008 or its Express Edition.
- The user must be a member of the computer group **SQLServerMSSQLUser\$<computer name>\$SQLEXPRESS**

## 64-bit support

You will find the 64-bit .msi files on the installation CD. Their file names end in **\_x64**.

HPE Records Manager 32-bit applications run on 64-bit operating systems; however, HPE Records Manager 64-bit applications do not run on 32-bit operating systems.

HPE Records Manager 32-bit clients and HPE Records Manager 64-bit clients can connect to a HPE Records Manager 64-bit server.

## Other Environment

### HPE Records Manager in virtual environments

HPE Software undertakes both development and testing of HPE Records Manager in VMWare virtualized environments.

Where an operating system supported for HPE Records Manager is virtualized, this should be transparent to HPE Records Manager; and this has been Hewlett Packard Enterprise Development LP's experience to date. HPE has numerous customers worldwide successfully using HPE Records Manager in virtual environments, with few or no issues. To date, all issues that have arisen have been resolved by reconfiguration of either the virtual host environment or the hosting hardware itself.

With regard to system performance, running HPE Records Manager in a virtual environment is likely to result in increased CPU utilization or other hardware resource consumption. This can result in a reduction in system workload capacity; hence a corresponding increase in transaction response times. Hewlett Packard Enterprise strongly encourages customers and partners to gather baseline performance statistics for HPE Records Manager in both conventional and virtual environments, and satisfy themselves as to the stability and performance of selected virtual environments before using them for production implementations.

If an issue arises in a virtual environment that does not also occur in a conventional environment; Hewlett Packard Enterprise Development LP cannot guarantee a resolution to the issue. Where it is apparent that a particular issue is specific to virtualization technologies, Hewlett Packard Enterprise Development LP may ask the customer to reproduce the issue in a non-virtualized environment before committing further support resources.

### HPE Records Manager and Citrix

Hewlett-Packard neither formally test nor certify HPE Records Manager on any version of Citrix; nor do we produce documentation about deploying HPE Records Manager in Citrix. It is the customer's responsibility to perform in-house testing in their own network environment with their own version of Citrix before deciding whether Citrix is a suitable deployment platform for HPE Records Manager in their organization.

Hewlett Packard Enterprise Development LP Support makes every reasonable effort to assist a customer who reports an issue with HPE Records Manager where it has been deployed using Citrix, but we do not support the Citrix environment itself. Hewlett Packard Enterprise Development LP's past experience with HPE Records Manager sites using Citrix suggests that when Citrix is configured correctly, e.g. user profiles, home drives, printers etc. behave similarly to a non-Citrix desktop environment, and HPE Records Manager is deployed in a desktop that includes any applications to be integrated with Records Manager, e.g. Microsoft Office suite and email, there should not be any significant issues.

If an issue arises with HPE Records Manager in a Citrix environment that does not also occur with a conventional HPE Records Manager installation, Hewlett Packard Enterprise Development LP cannot guarantee a resolution to the issue. Where it is apparent that a particular issue is specific to the Citrix deployment, Hewlett Packard Enterprise Development LP reserves the right to ask the customer to reproduce the issue in a non-Citrix environment before committing further support resources.

For more information on this subject, see the Hewlett Packard Enterprise Development LP Software Support article at <http://support.openview.hp.com/selfsolve/document/KM1456476>.

## Relational Database Management System (RDBMS) requirements

### Supported RDBMS servers (64-bit)

- SQL Server 2008 SP3
- SQL Server 2008 R2 SP2
- SQL Server 2012 SP1
- SQL Server 2014
- Oracle 11g R2
- Oracle 12c

**Note:** When creating a SQL Server database for HPE Records Manager, it is strongly recommended that you use a case-insensitive (CI) collation sequence.

### Supported RDBMS clients (64-bit)

HPE Records Manager supports the OLEDB drivers recommended by the RDBMS manufacturers.

### RDBMS configuration and user account permission prerequisites

Contact HPE Support for assistance.

# Limitations and Behaviors

## General

- Microsoft Active Accessibility (MSAA) support - Locations **Prefix** search - activating the user interface MSAA support in **Customize**→**Options** makes the **Prefix** search facility in Locations unavailable.
- Icon size in spelling checker - the spelling checker icon in HPE Records Manager does not comply with standard Windows display setting because it is a third-party application.

## Supported Languages

In regards to the English Language choices within our software, by design, we follow the Oxford Dictionary which accepts the US spelling as equivalent in both languages and therefore some words are not converted if the language is changed between English (US) and English (International), for example Favorites.

| Released Version       | Supported Languages  |
|------------------------|--|
| 8.3                    | English (International), English (United States)   |
| 8.2x                   | English (International), English (United States), Dutch**, French**  |
| 8.1 (multi-language).x | English (International), English (United States), Dutch, French, German, Spanish, Italian, Portuguese (Brazilian)*, Russian*   |
| 8.1                    | English (International), English (United States)   |
| 8.0 (multi-language).x | English (International), English (United States), Dutch, French  |
| 8.0                    | English (International), English (United States)   |
| 7.3.x                  | English (International), English (United States)<br>7.2x versions of the translation files: Dutch, French, German, Spanish, Italian, Portuguese (Brazilian), Russian |
| 7.2.x                  | English (International), English (United States), Dutch, French, German, Spanish, Italian, Portuguese (Brazilian), Russian   |

\* software only (documentation has not been localized)

\*\* the language pack installers for the translated files are available on the 8.2 Patch 1 ISO or can be downloaded from <https://softwaresupport.hp.com/> These language pack installers can be used to install the currently supported languages to any version of HP Records Manager 8.2x

## Unicode support

HPE Records Manager can manage any Unicode metadata and content, as long as the database is configured to support Unicode characters. Without the database supporting Unicode characters, HPE Records Manager will regard these characters as invalid and an error message will be displayed.

**Note:** HPE Records Manager Title and Notes word indexing relies on word splitting using spaces and punctuation, and does not have capability to correctly index data that does not split words using spaces or punctuation. If you're using IDOL to document content index your HPE Records Manager objects, they will be indexed, but if you want to search for them you'll need to have the appropriate Asian language packs installed with IDOL so it can properly understand how to split the words. For additional information about IDOL and Asian languages, refer to the IDOL Customer network on <http://customers.autonomy.com>

## Installation

- The versions of all HPE Records Manager peripheral applications, components and integrations on the computer have to be the same as the version and build number of the main HPE Records Manager application on the same computer
- When installing, upgrading, repairing or removing HPE Records Manager applications, all applications on the computer should be closed

## License Keys

- When applying a new License Key for a pre-8.2 version of HPE Records Manager, the Global Settings are not retained and will need to be reconfigured and deployed after the License Key has been applied.

## Help

- **F1** does not display correct Help topic on right-click menu options – when you press **F1** to display the associated help topic for a right-click menu item, the topic that appears instead is for the list panes and view panes, which is on the screen behind the floating right-click menu. This is a known limitation.
- Due to the nature of the translation process, Help files in languages other than English may not contain the latest content and in rare cases, links may not work correctly. For the latest content, consult the Help file in an English version.
- Our own document **OurOwn.pdf** is a sample document that you can replace with your organization's own document for users to access their own procedures using the HPE Records Manager Help file. The link from the HPE Records Manager Help file to **OurOwn.pdf** works when HPE Records Manager is installed in the default folder **Program Files\Hewlett-Packard\HPE Records Manager**; however, the link does not work when HPE Records Manager is installed in a different folder unless you edit the **Start In** parameter in the shortcut to the new HPE Records Manager folder path.
- The OurOwn.chm runtime merge facility has been tested to work when developed with the help authoring tool Madcap Flare. Other help authoring tools are not guaranteed to work.

## Access control and security

- Downgrading a user's security profile – when you downgrade the security profile of a user and they have records marked to them that are of a higher security level than the users, then no security violation warning may appear.  
For example, create a record within a Record Type which has top secret profile settings making **User** the **Assignee** Location. **User** has a top secret profile. Then downgrade **User** to **Unclassified**. The record now has an **Assignee** Location with a lesser security profile than itself. However, you can use the HPE Records Manager system option in the **Security** tab **When changing Assignee, Home or Owner for a Record to a less secure Location** to set up Records Manager to display a warning or even prevent the downgrade.
- Access Controls and record creation and default Retention Schedules - Access Control on a Retention Schedule that is set as a default for a Record Type will not prevent users from creating records of that Record Type if the **Retention Schedule** field is not on the New Record form. Adding the **Retention Schedule** field to the New Record form for the Record Type will prevent users from creating records of that Record Type using the default Retention Schedule.
- Access Restrictions and US DoD 5015.2 compliance – when **Administration** → **System Options** → **Features** tab, **Classified Security** or **Compliance** tab, **Implement US DoD 5015.2 compliance**, or both are selected, HPE Records Manager operates according to the US DoD 5015.2 software application design criteria standard.  
See <http://jitc.fhu.disa.mil/recmgt/standards.html> for more information about the standard.

## Records and containers

We generally recommend limiting the number of records within a container to less than 300. This guideline is useful for storage of documents and helpful when managing information archiving. Sorting and displaying records within a container is resource intensive; any more than the recommended limit may result in performance degradation.

However, if you really need to use containers with large numbers of records in HPE Records Manager, you can improve performance with the option **Optimize management of contained Records to allow for very large folder sizes** in the **System Options - Records** tab.  
See HPE Records Manager Help for more details about this option.

It is generally also recommended not to use too many container levels.

A typical implementation uses three container levels:

- Documents
- Folders
- Archive Boxes

More container levels may lead to performance degradation when HPE Records Manager performs recursive comparison such as checking security or retention rules across multiple aggregation levels. HPE Records Manager checks retention rules recursively down through a maximum of four container levels.

- Record creation and Record Types using **Numbering by Container** - when you number records by container and then change the number of the container, the contained records will not have their corresponding record numbers updated to reflect the new container number.  
Similarly, when you change the record's container, this will not update the record's number either. In



these circumstances, it is best to manually renumber the contained records.

- Record titles using **Client titling** - changing a Location name will not change any records created using the Location as the Client title. The change will, however, be reflected in the **Properties** dialog of the record; but not in the title displayed in the view or list panes. Searching by Client Contact with the new Location name will find the record.  
To manually rectify this:
  - a. Find any records created using the Location
  - b. Modify the Location name
  - c. Right-click one of the records and select **Properties**. In the **Client** field, delete any Location item and then use KwikSelect to choose the modified Location
  - d. Click **OK** to save the change
  - e. The record title will change accordingly and will now show the correct Location
- Copy record - copying record relationships behavior - when **Copy Relationships** is selected when copying a record, only the **is Related To** relationship type is copied.  
An exception is when creating a new version, in which case any **IsTempCopy** relationship is copied.  
This is to avoid potential conflicting or incorrect relationships being created by the copy operation. For example, if record A has a **supersedes** relationship with record B and a user then copies record B to create record C, then does record A supersede record C?
- Copy record - **Date Due for Destruction** and **Date Inactive** are not copied from the original record when a new part, new version or record copy are performed. For a new part, HPE Records Manager does not copy **Date Published**, either.  
While the process of copying a record creates a blank **Date Due for Destruction** field, any pre-determined states will enter an appropriate date, for example, a Retention Schedule attached to a record being copied, default Retention Schedule on a record, etc.
- Notes field limitation – the **Notes** field is limited to 64 KB (65536 characters). If a user exceeds this limit, the message **An attempt to set the Notes text to contain XX KB failed. Notes text cannot exceed 64KB (65536 characters). The Notes text will be truncated at this limit** appears.

## New Record forms

- Scroll bars - when there are more fields on the form than can be shown in the standard size New Record form dialog box, the New Record forms will have vertical and horizontal scrollbars allowing the users to scroll through the fields on the form.  
If, however, too many fields are on the form, the dialog box may have problems displaying all the fields.
- Mandatory container fields - when selecting **Container Numbering** for a Record Type, the Record Type will automatically enter Container as a mandatory field for the new New Record form. However, if you change the numbering to a different type, then HPE Records Manager does not remove the **Container** field from the form automatically and therefore, you need to remove it manually.
- Assignee Location on a New Record form filled in and then replaced - when there is an **Assignee** field on a form first and there is actually a Location there that was added according to the system rules for enclosed - that is, that require the user to set an Assignee to keep a record from being enclosed automatically - then when a user types in a container for the record, it removes the allocated Assignee and replaces it with the container number.  
To rectify this, you need re-assign the record.
- **Enclose** option - when on a New Record form, the **Enclosed** option will override the record's details and the set defaults from the Record Type or system settings
- Default **Enclose?** option
  - will not retain its default setting in the form and apply it to a new record.  
If you set up the default **Enclose** option for a record to **No**, then when you enter a container on the form, the option details will be overwritten. Therefore, even though the **Enclose** option is not selected on the form because of the default, the record will still revert to the container as the **Assignee** and **Enclosed?** will be **Yes**.
  - the **Enclosed?** behavior is programmatically selected, i.e. not configurable using **System Options**. For this behavior to occur, a record's **Assignee** Location must be equal to the record's **Home** Location. This can be achieved in a number of ways, for example, Record Type Default Location or **Administration** → **System Options** → **Locations** tab.

### Method 1

- a. Record Type - Default **Home** Location = Blank
- b. **System Options** - Record **Assignee** = Current Login
- c. Record **Owner** = Assignee
- d. Record **Home** = Assignee
- e. Record Details after creation are: **Enclosed?** = **No**
- f. Assignee = At Home Location: User1
- g. **Owner** = User1
- h. **Home** = User1
- i. Right-click this record → **Location** → **Container**.  
Here you will see that the **Enclosed?** selection box is cleared with an informative message telling you this record is currently **at Home in User1**.  
If you choose a container, this will become its new Home Location and the record will be enclosed automatically.

## Method 2

- a. a Record Type - Default **Home** Location = Position1
- b. **System Options** - Record **Assignee** = Default Position
- c. Record **Owner** = Assigneed
- d. Record **Home** = Assigneee
- e. Record Details after creation are: **Enclosed?** = **No**
- f. Assignee = **At Home** Location: Position1
- g. **Owner** = Position1
- h. **Home** = Position1
- i. Right-click this record → **Location** → **Container**.  
Here you will see that the **Enclosed?** check box is cleared with an informative message telling you this record is currently **at Home in \*\*\***.  
When you choose a container, this will become its new Home Location and the record will be enclosed automatically.  
When you change the Home Location, then the Assignee will keep the default Assignee Location from the Record Type.

**Note:** The **Associations** of a Location only go up one level. You can make the parent Organization the default, for example, in the following hierarchy structure; Parent Organization - Child Organization - Position – Person.  
The default Organization for Person will always be Child Organization unless you manually make Parent Organization the default.

On a New Record form, when a user has explicitly changed the value of an Additional Field that has a default value determined by the record Classification, and then changes the Classification, then HPE Records Manager does not change the Additional Field's value to the value determined by the new Classification

## Searching

- **Classification Word** searches - when you enter one word, it means **find records whose attached Classification contains the word**

**Note:** When you enter many words, it means **find records where the attached classification contains all the words**

When you type a wildcard character (\*), it means **find records where the attached classification contains a word matching the wildcard character**

When you type a wildcard character and one or more other words, it means **find records where the attached classification contains a word matching the wildcard and contains all the other words as well**

- **Record Number Range (Compressed)** – this search method is a simple string search method that searches alphabetically for the values you entered, whether they are numbers or letters. Therefore, it is essential that you know the record number pattern of the records you are looking for.  
For example, when you enter a search for records in the compressed number range from **1998/1** to **1998/100**, Records Manager does not return record 1998/50, because alphabetically, it is not within the range you specified.  
Workaround: Use the **Record Number Range Search (Expanded)** search method instead, as it

does not require a valid number.

- Sort order of container content – subordinate items under a container that you expand with the plus symbol are not sorted according to the criteria the container is sorted by, but by a default field. For example, records under containers are sorted by **Date Registered** in descending order.  
Workaround: Right-click the container record and click **Contained Records** to see the container content in a separate search window, where you can sort the records as you require.
- When **Automatically count results where possible** on the **Tools** → **Options** → **Search Result** tab is selected, and the user experiences delays with Records Manager returning their search results, turning off this option may improve performance
- The **Previous search** button executes the previous search result again and replaces the current search result
- HPE Records Manager applies the default sort order and filters only to new searches, i.e. from the **Search** menu or the **Search** pane, but not, for example, to searches using the Location **Show**, or Classification or Hold **Show Records** commands
- The IDOL search engine is designed to return a fixed number of items. The default value for HPE Records Manager searches that use the IDOL search engine is 10,000.  
You can change this figure by changing the IDOL configuration files. In HPE Records Manager Enterprise Studio Help, see the topic **Advanced configuration of OEM IDOL** about the parameter **MaxResults**.
- Saved Searches – due to the design changes made in the Search module in HP Records Manager 8.0, Saved Searches that have been created in HP TRIM 7.3x will not work in HP Records Manager 8.x after upgrading.  
A Saved Search Conversion utility has been added to the Administration menu in HP Records Manager 8.11 and is available in 8.11x or later. Administrators can run this utility to convert old versions of Saved Searches into the correct format for HPE Records Manager. Depending on the complexity of the Saved Searches, the conversion may not be successful. In particular, Action Tracking saved searches and Communications saved searches are not converted the 8.11x or later version of conversion utility. Searches that fail to convert are left as “old format” searches in the system. It is recommended that organizations document their Saved Searches before upgrading.
- By design, when an existing Saved Search is overwritten, the Active Audit Log will show that Saved Search was Deleted and a new Saved Search is added.

## Report layouts

- The thickness of a line in a report layout can be controlled, but not the thickness of lines for rectangular boxes
- The option **Print Alternative Barcode?** in the report layout barcode item properties dialog box prints the expanded record number and therefore, applies only to record barcodes, not Location barcodes
- To print more than one page of notes or **Additional** text **Fields** for a record, a report requires them to be the last active item in the **Band Definition** list.  
Its height must be greater than 1 line so that it may automatically (dynamically) increase vertically to display all the data in the field.
- If the report layout contains more than one text field, for example, both **Notes** and an text Additional Field, the field text area in the report band may expand over other fields in the report, making them

illegible. The issue does not occur for the last field in the report band or when the number of characters and/or the font size are small enough to fit all text in the text field area.

- Users in the same HPE Records Manager session cannot open the same report more than once simultaneously
- Users in different HPE Records Manager sessions, for example on different computers, can open and modify the same report. However, only the last modification saved is retained and the administrator will receive a mail notification informing them that the document store could be corrupted.

## Printing

- When printing items whose file type is set to **Bypass Viewer**, HPE Records Manager does not display a confirmation dialog.  
When bypassing the internal HPE Records Manager viewer, you are printing from the associated application. For example, when **Bypass Viewer** is selected for Word documents, clicking **File** → **Print** in HPE Records Manager prints the document. When **Bypass Viewer** is not selected, the viewer handles printing and HPE Records Manager displays a confirmation message in case you have clicked **Print** by accident.
- Printing a specific page of a report is not supported in HPE Records Manager. For example, if you are printing a large multi-page report and the printer has a paper jam, it is not possible to select a page or a range of pages to reprint. Instead, you need to print the whole report again.
- When you print a Word document or an Excel spreadsheet from Offline Records, HPE Records Manager opens Word or Excel to print. The same behavior occurs when you right-click to print a Word document or an Excel spreadsheet from the desktop or Windows Explorer.
- Some documents may take longer to print than others, such as large graphic files, or produce corrupted print. For best printing results, use the original application for printing large and complex image files where possible. The HPE Records Manager image viewing software is designed for generic viewing and does not produce the same viewing results as the authoring application.
- Printing reports - when selecting a different printer to print a report, HPE Records Manager uses the same settings as for the previous printer. Known Windows limitation.
- Users may experience long delays when viewing or printing MS PowerPoint files from HPE Records Manager. As a workaround, it is recommended that they add the MS PowerPoint file extensions, PPT and PPTX, to the **Bypass Viewer for these document types** option on the **Options - Viewer** tab.

## HPE Records Manager viewer

- KeyView provides different levels of support for different file formats:
  - Viewing
  - Filtering (the ability to extract text)
  - Exporting (the ability to convert the file to HTML or XML format)
  - Metadata extraction
  - Detection (ability to detects its format)

Not every file format is supported for every level. This is a known limitation of a third-party product. For an overview of the KeyView viewing capabilities as well as a list of supported content repositories, file formats, character sets and languages, contact your local HPE software support organization.

To use a localized version of the viewer, users should have the permission **Full Control** to the

Windows **Program Files** folder.

- When an email message contains information that is stored in a location inaccessible for the HPE Records Manager viewer, for example a signature on a secure Internet site, HPE Records Manager viewer may not be able to display the entire message, and cannot apply retention business rules or store the remote part of the message.

## Statistics reports

- Actions deleted from HPE Records Manager that were attached to a record before remain in the **KwikSelect** → **Action** name list
- Record statistics reports cannot generate or export statistics if Microsoft Excel is not installed on the computer.  
Microsoft Excel components are used to export the statistics report details.

## Action tracking

- Assigning a Procedure with a **Start Date** may generate a **Start date must not be before** message if the regional settings on the PC have the time set for 12 hour time but no designation for AM or PM.
- When attaching an Action to a record with the option **After any Existing Record Actions for this Record**, HPE Records Manager will start this Action after the completed Actions' **Due** date, not their **Completed** date.

## Dates

- HPE Records Manager supports any valid Gregorian date, back to the year 100.  
Records Manager converts years from 30 to 99 to a four-digit year in the 1900s, and a year from 0 to 29 to a year in the 2000s.
- When a document is checked into HPE Records Manager, the earlier of the electronic document's Date Created or Date Modified will be applied to the HPE Records Manager record's Date Created field.  
For example, if an electronic document has a Date Created of 28/02/2015 and a Date Modified of 26/02/2015, when that document is checked into HPE Records Manager, the record's Date Created will be the same as the attached document's Date Modified, 26/02/2015.

## Barcodes

- Foreign barcodes that contain non-printable characters are not supported, for example, tab etc.
- If a user does not have **Can Use** access to a particular Location, they will not be able to change the record's Assignee Location using a barcode scanner

## Thesaurus

The HPE Records Manager Thesaurus has been designed to follow the recommendations of ISO 2788 - Guidelines for the establishment and development of monolingual Thesauri.

While every term may have as many narrower terms as a user may require, a well-designed Thesaurus will have an appropriate number of subordinate terms, typically to a maximum of 10 to 15 terms.

- Thesaurus terms cannot contain hyphens (-).

## Currency and language

- The default currency symbol set in the **System Options** → **Currency** tab only allows one system-wide default to be set up
- French **Date Received** Additional Field and checking in email - when checking in an email message, the **Date Received** Additional Field of type date or date/time will be populated under all available language variations. However, for the French version of **Date Received (Date de Réception)**, the accent must be used in the label of the field for it to function.
- Changing the caption of a field in HPE Records Manager changes it in all interface languages

## Tagging and dragging

- If you are performing a task on some tagged records which causes some of the tagged records to no longer fit the search criteria for the window, then press **Refresh** before performing any additional tag processing, for example, reporting, retention etc.
- Dragging messages to a linked folder in Outlook - HPE Records Manager may not automatically process large numbers of items when dragged to a linked Outlook folder.  
When a mail message is added to a managed folder in Outlook, an event starts.  
There is a limitation on the number of items that can be dragged to a folder in Outlook and still start this event  
-they may not all be checked in to HPE Records Manager and error messages may not appear. The items will, however, be added to the selected folder.  
When there are unprocessed items in a linked folder, it is recommended you use the HPE Records Manager in Outlook functions **Check in all linked folders** to process the unprocessed items in all folders, or **Check in linked folder** to process just the items in the selected folder.
- When a user drags and drops the same document in quick succession, if the **Record Type** has the **Behavior for Duplicate Titles** set to **Display Warning** or **Prevent**, the warning/error stating that there is a duplicate titled record will not be displayed as HPE Records Manager has not completed the Word Indexing for the first document. The user must wait for the first document to be indexed before a duplicate title check will work.

## Interface

- Some field values appear differently depending on whether they are in a column or in the **View** pane. This is because of the differing amount of space available to display the values.
- Custom toolbar icons – HPE Records Manager does not support the creation of user drawn toolbar icons. A wide selection of predefined icons is available.
- Status bar - staff name display - in online mode, the staff name is obtained from the Location's display name. In offline mode, the staff name is obtained from a Location's network login.

## Locations

- It is recommended to limit the number of staff members allocated to work areas or units to 80 to 100 at each level which enables HPE Records Manager to sort, display and refresh the screen at an acceptable performance level.  
If the number of Locations exceeds this guideline, customers should enable the HPE Records Manager system option **Administration** → **System Options** → **Object Cache** tab → **Optimize**

**Performance of → Location Member Of Relationships.**

- Special characters in Location names limitations:
  - The percentage character (%) is supported, but may cause some inadvertent search results in Location searches
  - The asterisk character (\*) is supported but may cause confusion as it is used as a wildcard search character
- Location properties **Associations** tab – HPE Records Manager does not support changing the order of **Member Of**, **Supervised By** and **Delegate Of**. The **Move Up** and **Move Down** options are only available for the **Has Members**, **Supervisor Of** and **Has Delegate** items.
- Default Location cannot be changed to regular – in the Location properties **Associations** tab, when an association type has only one Location, HPE Records Manager makes it the default. To change its status to regular, make another Location of the same association type the default first.
- User cannot choose between multiple email templates for the same mail event type – if there are multiple email templates for the same mail event type, HPE Records Manager will use the first one according to its name to create an email notification for the event. Users cannot choose the one to use. Workaround: Create only one email template per event.

## Alerts

Due to the design changes made in the Alerts module in HP Records Manager 8.1, Alerts that were created in previous versions of HPE Records Manager and HP TRIM are removed as a part of the upgrade process and will need to be manually redefined in HP Records Manager 8.1 after upgrading.

It is recommended that all Alerts are reviewed and documented before upgrading to HP Records Manager 8.1. This will assist you in recreating the Alerts after upgrading.

## Desktop integration

- Password protected files - password protected files (that is, the password added in authoring application) are not supported. Password protection can cause problems with several facets of HPE Records Manager operations.

**Note:** Deactivating password protection does not necessarily reduce the security problem because a prime purpose of a professional enterprise content management system is to provide storage, retrieval and security for all registered files.

## General

- When attempting to use **Check Out** on a record with an email attachment, the message **It is not valid to edit documents of this type** appears in the **Check Out Document** dialog. This is due to the fact that editing email messages is not possible after they were sent.  
Workaround: Extract the electronic document using **Supercopy**.
- Unlocked files - apparent check in discrepancy - certain applications do not lock files when in use, for example, WinZip, which means in turn that HPE Records Manager cannot determine whether the file is in use.  
In certain circumstances, for example, when a user modifies a \*.zip file after it has been checked back in - see steps below, this may result in multiple copies of the file.  
Where applications do lock documents in use - for example, Word - check in is disallowed in Offline



Records.

For example:

- a. Right-click and select Edit to edit a \*.zip record, for example, Test.zip, which checks out the document for editing using HPE Records Manager Desktop.  
HPE Records Manager automatically checks the document back in when you close the document or authoring application. Before modifying the document or closing the application or document, open Offline Records standalone and check in the \*.zip file
  - b. In the authoring application, modify the \*.zip file
  - c. Close the document and authoring application.  
The record in HPE Records Manager has the original document with the original contents and a new draft document has appeared in Offline Records with the modified content.  
This is the same behavior as when you delete a \*.zip file from Windows Explorer while editing the .zip file using WinZip.
- Checking in multiple documents using right-click **Send To** from Windows Explorer may result in the Windows error message **Windows cannot access the specified device, path, or file. You may not have the appropriate permissions to access this item.** - known limitation caused by Windows, not limited to HPE Records Manager.  
Workaround: Send smaller file groups instead.
  - Document queues – sub-folder processing not supported. The document queue processor does not process items in sub-folders. Instead, you will need to create a separate queue to process this folder.
  - Keyboard shortcuts for Microsoft Office 2007 and 2010 applications other than Word and PowerPoint may not work as expected when integrated with HPE Records Manager. This is due to limitations of those Microsoft Office applications.

## Offline Records and HPE Records Manager Desktop

- The option **Tools** → **Options** → **Search Result tab** → **Automatically view electronic documents** is not supported for HPE Records Manager Offline Records
- Offline Records in offline mode and **Container** icons - when a user checks out a container record to Offline Records, the record uses the icon of the Record Type at the time of checkout.  
If the icon changes in HPE Records Manager, it is not reflected in Offline Records until the record has been checked back in and then back out to Offline Records.
- Offline Records file path lengths – maximum lengths supported by applications - different versions of Office and other applications have different file path length limits.  
When a user saves a document in Offline Records, the maximum number of characters is determined according to the application limit. The document name will be truncated at whatever it needs in order to not exceed the applications total file path length limit.  
For example in Excel, the file path length is set at 201 characters including the full Offline Records path, such as **C:\Documents and Settings\user\My Documents\Offline Records (03)\folder name\document name.xls.**
- AutoCAD 2005 - when an AutoCAD 2005 file is saved to Offline Records by clicking **My Offline Records** in the **Save In** box, double-clicking Offline Records does not open Offline Records.  
Workaround: Click the **Save** button to first open Offline Records and then the file can be saved to Offline Records.

- Offline Records and **My Documents** folder set as a shared folder – it is not recommended for organizations to configure their environment so that the **My Documents** folder is a shared network resource, as Records Manager Offline Records will not work as designed, which is as a resource when there is no network access
- Offline Records ODMA file name limit – the file name length for saving Offline Records documents is limited by the authoring application and/or the operating system. The environmental allowed length differs for the various Windows environments. This limit is set by the allowed length of the file name and path as saved in the user's temporary folder.
  - The allowed file name length is determined by subtracting the length of the path and file name from the allowed length in the environment minus four characters for the file extension. The difference is the allowed file name length and the user name length.
  - For example, when saving a document using Offline Records ODMA, the maximum path to the user's **Temp** folder is determined and the number of characters for that is compared with the total number of characters supported by Microsoft. The remainder is the maximum number of characters you may enter in the record name that will appear in HPE Records Manager.
  - In some operating systems, the title will be truncated with a 0 in the middle.
  - It is recommended not to save records with a title length greater than the Windows temporary path limit.
- Offline Records and Microsoft Word file names - in MS Word, the file names include the path as part of the file name and are limited to 256 characters. This is a MS Word field length limitation.
  - Therefore, when you attempt to save a file using Offline Records and you make the file name too long, Word truncates the name to fit the 256-character limit.
- Offline Records and Microsoft Visio - **Save Direct** option – Microsoft Visio does not implement ODMA correctly and is unavailable in HPE Records Manager.
  - If it should still call HPE Records Manager, suppress the ODMA functionality for Visio file types in **HPE Records Manager Enterprise Studio** → **General** → **File Types**.
  - You can then put Visio files into HPE Records Manager using dragging.
- Upgrading of an older version of the **TRIMTD.mdb** file is not supported
- Offline Records ODMA is not supported under 64-bit operating systems
- When you apply global settings, HPE Records Manager resets offline folders to system default settings

## MS Office

### Microsoft Office client add-in functionality

You can use HPE Records Manager add-ins in Microsoft Office applications. The tables show the applications and the HPE Records Manager add-in commands they support:

| <b>Office 2007 SP3 (32-bit)</b> |             |              |                   |                |
|---------------------------------|-------------|--------------|-------------------|----------------|
| <b>Feature</b>                  | <b>Word</b> | <b>Excel</b> | <b>PowerPoint</b> | <b>Project</b> |
| Open                            | Yes         | Yes          | Yes               | Yes            |
| Save, Save As                   | Yes         | Yes          | Yes               | Yes            |
| Record Properties               | Yes         | Yes          | Yes               | No             |
| Make Final                      | Yes         | Yes          | Yes               | No             |
| Insert Picture                  | Yes         | Yes          | Yes               | No             |
| Insert Object                   | Yes         | Yes          | Yes               | No             |
| Insert Text from File           | Yes         | No           | No                | No             |

| <b>Office 2010 SP2 (32-bit and 64-bit)</b> |             |              |                   |                |
|--|-------------|--------------|-------------------|----------------|
| <b>Feature</b>                             | <b>Word</b> | <b>Excel</b> | <b>PowerPoint</b> | <b>Project</b> |
| Open                                       | Yes         | Yes          | Yes               | Yes            |
| Save, Save As                              | Yes         | Yes          | Yes               | Yes            |
| Record Properties                          | Yes         | Yes          | Yes               | Yes            |
| Make Final                                 | Yes         | Yes          | Yes               | Yes            |

| <b>Office 2010 SP2 (32-bit and 64-bit)</b> |             |              |                   |                |
|--|-------------|--------------|-------------------|----------------|
| <b>Feature</b>                             | <b>Word</b> | <b>Excel</b> | <b>PowerPoint</b> | <b>Project</b> |
| Insert Picture                             | Yes         | Yes          | Yes               | No             |
| Insert Object                              | Yes         | Yes          | Yes               | No             |
| Insert Text from File                      | Yes         | No           | No                | No             |

| <b>Office 2013 (32-bit and 64-bit)</b> |             |              |                   |                |
|--|-------------|--------------|-------------------|----------------|
| <b>Feature</b>                         | <b>Word</b> | <b>Excel</b> | <b>PowerPoint</b> | <b>Project</b> |
| Open                                   | Yes         | Yes          | Yes               | Yes            |
| Save, Save As                          | Yes         | Yes          | Yes               | Yes            |
| Record Properties                      | Yes         | Yes          | Yes               | Yes            |
| Make Final                             | Yes         | Yes          | Yes               | Yes            |
| Insert Picture                         | Yes         | Yes          | Yes               | No             |
| Insert Object                          | Yes         | Yes          | Yes               | No             |
| Insert Text from File                  | Yes         | No           | No                | No             |

| <b>Office 2016 (32-bit and 64-bit)</b> |             |              |                   |                |
|--|-------------|--------------|-------------------|----------------|
| <b>Feature</b>                         | <b>Word</b> | <b>Excel</b> | <b>PowerPoint</b> | <b>Project</b> |
| Open                                   | Yes         | Yes          | Yes               | Yes            |
| Save, Save As                          | Yes         | Yes          | Yes               | Yes            |
| Record Properties                      | Yes         | Yes          | Yes               | Yes            |
| Make Final                             | Yes         | Yes          | Yes               | Yes            |
| Insert Picture                         | Yes         | Yes          | Yes               | No             |
| Insert Object                          | Yes         | Yes          | Yes               | No             |
| Insert Text from File                  | Yes         | No           | No                | No             |

## General

- Default file types for integrated Microsoft Office applications
  - Excel - uses the default file type set in Excel when it is **xls, xlt, xlsx, xlsx, xlsb, xltx, xltm**. When the default is different, HPE Records Manager uses a default of **xlsx** in for Excel 2007, 2010 and 2013.
  - Word - uses the default file type set in Word when it is **doc, dot, docx, docm, dotx, dotm**. When the default is different, HPE Records Manager uses a default of **docx** for Word 2007, 2010 and 2013.
  - PowerPoint - **pptx** for PowerPoint 2007, 2010 and 2013
  - Project - **mpp** for all versions
- When using HPE Records Manager's integration with MS Office 2010 to save an email attachment to Offline Records and the attachment appears in **Protected View**, HPE Records Manager may display an error message and Excel may stop responding.  
Workaround: In **Protected View**, click **Enable Editing** before saving the attachment.
- When a user attempts to save a document to HPE Records Manager from an integrated MS Office application and the application **TRIMwatcher.exe** does not exist or is not registered correctly, HPE Records Manager may display the message:  
**HPE Records Manager Error Number: (22182), Windows Error Number: (00000000)**  
**Description: An error occurred checking in 'C:\Users<account>\Documents\Offline Records (2T)\mydoc.docx'. An error occurred accessing the repository for Offline Records. The RPC server is unavailable.(#800706ba) (Is trimwatcher registered ?) Records Manager has kept a copy of this Record in your Offline Records folder.**  
To fix the issue:
  - a. Check that the file **TRIMwatcher.exe** exists in the installation folder, by default **C:\Program Files\Hewlett-Packard\HPE Records Manager**. If it does not exist, run the HPE Records Manager installation file and choose **Repair**.
  - b. From a command line prompt, type **TRIMwatcher –register** and press **Enter**
  - c. Navigate to the Offline Records folder, by default **C:\Users\<user name>\Documents**, right-click the document that did not check in to HPE Records Manager, and on the **Send to** menu, click **HPE Records Manager**
- Conflicts of HPE Records Manager Microsoft Office add-ins with 3rd party add-ins – HPE Records Manager Office add-ins for Office 2010 and earlier work with the Office **File – Close** and **File - Save** commands. While HPE does not anticipate conflicts, nor have received reports of conflicts, there is a theoretical chance that a 3rd party add-in that also works with these commands may conflict with the HPE Records Manager add-in.  
The Records Manager Office add-ins for MS Office 2013 do not work with these commands, as Office 2013 uses a different operating model. As a result, the chance of conflict is reduced. Customers should thoroughly test their add-ins in operation with HPE Records Manager add-ins to identify possible issues before running the add-ins in a production environment.  
Workaround when conflicts arise: By using an MS Office custom property, users can turn the HPE Records Manager add-in for the MS Office applications Word, Excel, PowerPoint and Project on and off, depending on when they need to use the add-in functionality. For instructions, see the Tech Note at <http://support.openview.hp.com/selfsolve/document/KM00640635>.
- In an Windows 8 environment, printing HPE Records Manager records (electronic documents) can only be done from the MS Office authoring application **File > Print** menu options. If an HPE

Records Manager document is being viewed in the HPE Records Manager Office integration **Open** dialog, printing using the HPE Records Manager **Print Document** option is not supported.

## Compound documents

- Compound documents and email – HPE Records Manager does not detect compound documents when checking in from supported email clients MS Outlook or Lotus Notes
- Compound document renditions – the Renditions function does not recognize compound documents that are record renditions
- Broken links when viewing – after check in, compound document link is broken when viewing in Word or the browser plug-in - Windows limitation
- When a user checks out a document to Offline Records and then edits the actual document, not the link, checks in the document using the **Replace Current Revision** or **Make a New Revision** commands and then right-clicks it and views the document using the associated application - Word - or the browser plug-in for the viewer, the link reads **Error! not a valid link**.  
If the viewer is the HPE Records Manager viewer, the link works correctly, as HPE Records Manager does not alter a document.  
In Microsoft Word (**Edit** → **Link**), the link appears as incorrect because it is pointing to the path to Offline Records, rather than to the folder where the document actually is.  
When you first check out the document and open it, the **Edit** → **Links** function in Word displays the path to the folder where the container document is - the Offline Records folder. When you edit or update the link, it displays the correct folder path.  
If, however, you make changes to the container document and do not edit the link, HPE Records Manager uses the local Offline Records path when you check the document back in, rather than the folder path.
- Excel spreadsheets in Word documents – in Word, when trying to save the document while the Excel spreadsheet is active, an error message may appear. This is due to the way Microsoft Excel add-ins operate.  
HPE Records Manager does not detect that Word is the parent application until the user deselects and then reselects the Excel object.
- Cascading links in compound documents – HPE Records Manager does not detect cascading links within the first document through **Save** with direct ODMA integration as linked files must be stored as records
- Compound documents with broken links - if the path to a linked document does not exist or is not resolvable, HPE Records Manager does not detect a link at all.  
If HPE Records Manager cannot read the linked document, the link defaults to **External To HPE Records Manager**.

## MS Excel

- When Microsoft Excel in a version before Excel 2013 is open with an HPE Records Manager add-in enabled, other applications may not be able to access Excel's **Save** menu commands.  
Workaround: Close Excel.
- Excel including Excel 2007 and date formats - when opening and re-saving tab delimited or comma delimited files into HPE Records Manager using HPE Records Manager integration, ensure that date fields are set to **Text** format to avoid Excel ignoring the date format of the operating system and using US date format.

You can find more information in the Microsoft Knowledge Base article explaining Excel's handling of date formats: <http://support.microsoft.com/kb/214233>

- Excel **Share Workbook** function – HPE Records Manager supports editing of a shared workbook only when the workbook is checked out of HPE Records Manager to Offline Records or edited as supercopy.  
Using **Edit** in HPE Records Manager checks out the workbook temporarily, but automatically checks it back in when the user has updated or saved it.
- Multiple installed Excel add-ins on one computer are not supported • Microsoft Excel will not allow a custom menu item like the HPE Records Manager **Save**, **Save As** and **Open** commands be used if there is a change made in a cell and the user has not committed the change by moving out of the cell

## MS PowerPoint

- When closing an unmodified PowerPoint file with PowerPoint integrated with HPE Records Manager, PowerPoint may falsely report that the file has been modified and prompt the user to save the changes. This is a limitation of PowerPoint.

## MS other

- Microsoft Binder - HPE Records Manager cannot document content index text within Microsoft Binder files
- Microsoft Visio - Microsoft Visio does not support clearing the **Allow access to Windows File Open and Save dialogs** option. If this option is not selected, then whenever a user cancels the process, the **Local** dialog will appear.

## Thin Office Integration

- Microsoft Project – selecting an existing Microsoft Project Template (.mpt) file using the **Open** option will cause a new project to be created based on the selected template, rather than opening the template file for editing.  
This follows the native behavior of Microsoft Project which does not support editing an existing template file.

## Mail messaging and groupware systems

As of HP Records Manager 8.2, the email format checked into HPE Records Manager is dependent on the integration being used. The email formats captured are:

| Email Integration        | Captured File Format   |
|--------------------------|--|
| Outlook integration      | EML or MSG (based on System Option – Record tab – Email format when creating records from the HPE Records Manager Outlook Addin) |
| Thin Outlook integration | MSG as the native file output from MS Outlook  |
| ExchangeLink integration | EML as there is no MS Outlook interaction to convert to MSG  |

- Temporary files – known behavior - when mail notifications are processed and you click **Attach HPE Records Manager reference**, HPE Records Manager does not remove the temporary HPE Records Manager reference
- Embedded email messages are treated as attachments in HPE Records Manager – HPE Records Manager considers email messages that are embedded in an email message to be attachments. From a user's perspective, the message may appear to have no attachments; however, the HPE Records Manager options to check in attachments will be available.  
HPE Records Manager is unable to determine the attachment type for an email message and consequently, the commands **Send Attachments to HPE Records Manager** and **Send Attachments to Offline Records** will be available even when the attachments are embedded HTML.
- Date sent details - date sent information is stored for Extended MAPI compliant applications. Simple MAPI does not provide send date information.
- Email and BCC recipients - it is possible for an email message to be sent that only has **BCC** recipients.  
In some cases, this can result in the email not actually being delivered because some SPAM filters will not permit email in where the only recipients are **BCC** addresses.
- ODMA integration and the **Save As** option when an email attachment is open - the **Save As** option from an open email attachment does not propagate the **Title** field with the file name - for example, if you open an email attachment with a file name of **Project 99** and then click **Save As** with ODMA integration selected, the **Title** field of the record will be blank.
- Microsoft Exchange support – while Records Manager does not work directly with Microsoft Exchange, testing does include Microsoft Exchange and Outlook versions supported by Microsoft. However, as there are several versions of Microsoft Exchange and Outlook, as well as many possible Records Manager configurations, it is highly recommended that before upgrading your Microsoft Exchange servers, you undertake thorough testing in your software environment to ensure there are no issues.



## Microsoft Outlook

### Microsoft Outlook client add-in functionality

| Function   | Microsoft Outlook (32-bit)<br>2007 SP3,<br>2010 SP2,<br>2013,<br>2016 | Microsoft Outlook (64-bit)<br>2010<br>SP2,<br>2013,<br>2016 |
|--|---|---|
| Checking in to HPE Records Manager               | Yes   | Yes   |
| Checking in automatically from folder            | Yes   | Yes   |
| Checking in on send                              | Yes   | Yes   |
| HPE Records Manager email notification           | Yes   | Yes   |
| HPE Records Manager File/Send                    | Yes   | Yes   |
| HPE Records Manager mail messageform/send        | Yes   | Yes   |
| Attach HPE Records Manager record to new message | Yes   | Yes   |

- Linked folder errors will occur in Microsoft Outlook, if a user logs into the email client with a different name to their Windows user name.  
This occurs because HPE Records Manager’s Outlook integration writes its data to the HKCU section of the registry for the logged in Windows user. When a user then attempts to log into Outlook as another Outlook user, HPE Records Manager’s integration reads the settings from the logged in Windows user’s HKCU registry. Ensure that a single login name is used across Windows and the email client.
- **Meeting items – HPE Records Manager is designed to check in mail items, so meeting items can only be checked in when they are in the Mail window of Outlook, not when they are in the Calendar window of Outlook.**
- Microsoft Outlook - dragging multiple email messages - when you drag multiple messages to a linked folder in Outlook set to automatically check in and then delete the email messages, HPE Records Manager does not check them in.  
The workaround is to manually select **Check in all linked folders** so that they can be checked in to HPE Records Manager and then removed from Outlook. This is one of the reasons the option is provided.
- When selecting a large number of emails (300+) to delete them, a runtime error may appear. After the runtime error, the HPE Records Manager In Outlook integration does not operate anymore and you need to restart Outlook.
- Outlook linked folders – Sent Items folder - it is not possible to make a link to the Sent Items folder to capture all outgoing messages.  
The **Sent Items** folder is linked as a managed folder internally by the HPE Records Manager

Outlook integration. It has unique functionality for items that are added to its collection. The user can selectively check in an item sent by them rather than all items sent from their account. This will avoid noise emails from being checked into HPE Records Manager, giving users the control to selectively add their mail to HPE Records Manager.

If all items sent from an account are to be checked in, we suggest using an **Inbox** rule that copies them from the **Sent Items** folder to another folder which can be linked to HPE Records Manager.

- Outlook - HPE Records Manager **Send To** and signature blocks - there are many instances where the signature block is not included in an email, for example, **Explorer** → **Send to** → **Mail Recipient or Word** → **File** → **Send to** → **Mail Recipient**.

This is due to the function requesting a blank Outlook form. To resolve this, when the form appears, choose **Insert** → **Signature**.

- **Attach HPE Records Manager Record on Reply** option - after selecting **Reply** or **Reply to All** for a mail message, then **HPE Records Manager** → **Attach Records** from the toolbar and closing the message window without sending it while saving or not saving your changes, Outlook marks the message as having been replied to and saves a draft of the reply in the **Drafts** folder.
- Date and time properties of the actual email sent or received differ to those displayed in the HPE Records Manager viewer. HPE Records Manager rounds down the time to the nearest minute, while Microsoft rounds up to the nearest minute. Therefore, the email time details in HPE Records Manager will differ from the actual email time by a minute.
- Outlook email messages and document content indexing - when you check in an email message that was saved locally in **.msg** format or embedded emails sent to Offline Records, HPE Records Manager saves them as **.msg** files in HPE Records Manager format. HPE Records Manager indexes their content if that functionality has been applied to their Record Type.
- Outlook - multiple HPE Records Manager email attachments pasted into a new email message become multiple instances of the same attachment - under certain circumstances, where a user copies email attachments, then opens a new email message and pastes the copied attachments into the new email message window, the attachments may be overwritten with the contents of one of the attachments.  
Workaround: Users should either use **Forward** on the original email or use **Copy** on the attachments after having created the new email.
- Outlook - user cannot paste multiple HPE Records Manager email attachments into new email message - in certain situations, where the user copies email attachments before opening a new mail message, the clipboard will be deliberately cleared. This behavior is by design and due to limitations in saving and restoring the user's data on the clipboard while creating email. It does not affect text or files copied from Windows Explorer.  
Workaround: Users should either use **Forward** in the original email or use **Copy** on the attachments after having created the new email.
- Outlook - **Mark as Read** unpredictable behavior - when marking email items as **Read** using Outlook's right-click command and then immediately checking them in to HPE Records Manager without losing the focus, then unpredictable behavior may occur.  
The email that has been checked in will not have its subject prefixed with **RM**: which indicates that the email has been checked in.  
Another possibility is that the emails may be set back to **unread**.

The solution is to reselect the email messages after marking them as read:

- a. Select the email(s)
  - b. Right-click and select **Mark as Read**
  - c. Select a different email
  - d. Reselect the email(s)
  - e. Check in the email(s)
- Outlook **Send To** option - when HPE Records Manager in Outlook is enabled and a user selects **Send To** from another application, the message will be in the Outlook Outbox until **Outlook** is opened and the mail client is connected to the server.
  - **Check in on send** is not supported when the Outlook option **Save Sent Items** is not selected.
  - Outlook - using Word as email editor  
— On a new or editing an existing mail message, the HPE Records Manager mail toolbar and functionality are not available.  
For example, when your mail format is set to **Plain Text/Use Word to edit email messages** and you open a **Rich Text** formatted message, the **Check in** buttons are not appearing. For **Rich Text/Use Word to edit email messages**, the buttons do not appear when you open plain text messages.
  - Outlook toolbar - when the HPE Records Manager button in the Microsoft Outlook toolbar is minimized to show a **More Buttons** button (>>) and you click it, Outlook will no longer operate. This is a known limitation with third party buttons in Microsoft Outlook.

**Note:** If draft messages are open, they may not be saved.

- Outlook - Workgroup Server reboot causes the creation of linked folder to generate an error when choosing a container - that is, when you create a new linked folder and use **KwikSelect** to choose a container, an error appears: **Interface not registered**.  
Solution: Restart Outlook.
- **Simple MAPI** is not supported for Outlook
- Outlook and Avaya Unified Messenger – the Avaya Unified Messenger and HPE Records Manager In Outlook add-ins co-exist in Outlook; however there is no HPE Records Manager interface with Unified Messenger itself. That means, when using Unified Messenger, there is no HPE Records Manager functionality available.
- Outlook - managing HPE Records Manager linked folders and public folders on the Exchange Server – when you have multiple users linked to the same public folder on the Exchange Server and to the same HPE Records Manager database then when one person drags an email to the linked folder, all the users that have that folder linked will see the same dialog boxes as the person who is checking in the email message.
- Outlook public folders known limitation - at times, an automation error may occur when attempting to check in from a public folder **Inbox**. However, when you open the email first, you can check it in without the error.
- If the SQL database does not allow for Unicode characters, then after checking in an email message, HPE Records Manager replaces Unicode characters in the email subject line with other characters or question marks (?).
- Outlook – starting Outlook minimized – when running MS Outlook from a shortcut which has **Run** → **Minimized** selected in its properties, HPE Records Manager add-in buttons or menus may not appear and/or function correctly.  
This is due to Outlook configurations interrupting when running in the minimized state, a known

limitation of Outlook documented on the Microsoft web site

<http://support.microsoft.com/kb/251340/en-us>

HPE Records Manager in Outlook - hovering the mouse pointer over the **Container** field on the **HPE Records Manager Folder Properties** dialog of a linked Outlook folder does not display the container's record metadata. A workaround to resolve this issue is to add the following code to the Outlook manifest file:

Ensure any code called by Outlook is using version 6 of the Microsoft Common Controls.

This can be done by modifying the **Outlook.exe** MANIFEST file typically found at **C:\Program Files (x86)\Microsoft Office\Office12\** (for 32 bit Office 2007).

The following XML needs to be added to the manifest file.

```
<dependency>
<dependentAssembly>
<assemblyIdentity
type="win32"
name="Microsoft.Windows.Common-Controls"
version="6.0.0.0"
processorArchitecture="*"
publicKeyToken="6595b64144ccf1df"
language="*">
</assemblyIdentity>
</dependentAssembly>
</dependency>
```

The manifest file should end up looking something like this

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<assembly xmlns="urn:schemas-microsoft-com:asm.v1"
manifestVersion="1.0">
<nolnherit>
</nolnherit>
<assemblyIdentity processorArchitecture="x86" type="win32"
name="outlook" version="1.0.0.0">
</assemblyIdentity>
<description>Microsoft Office Outlook</description>
<dependency>
<dependentAssembly>
<assemblyIdentity type="win32" name="Microsoft.VC80.CRT"
version="8.0.50608.0" processorArchitecture="x86"
```

```

publicKeyToken="1fc8b3b9a1e18e3b"></assemblyIdentity>
</dependentAssembly>
</dependency>
<dependency>
<dependentAssembly>
<assemblyIdentity
type="win32"
name="Microsoft.Windows.Common-Controls"
version="6.0.0.0"
processorArchitecture="*"
publicKeyToken="6595b64144ccf1df"
language="*">
</assemblyIdentity>
</dependentAssembly>
</dependency>
<trustInfo xmlns="urn:schemas-microsoft-com:asm.v3">
<security>
<requestedPrivileges>
<requestedExecutionLevel level="asInvoker"
uiAccess="false"></requestedExecutionLevel>
</requestedPrivileges>
</security>
</trustInfo>
</assembly>

```

Starting Outlook after this change has been saved should resolve the issue.

- The Outlook 2013 setting **Cached Exchange Mode** affects the MAPI document browser. When the setting is not selected, Records Manager document queues of type **Extended MAPI Folder** do not display or process the email messages in the **Process Document Queue** window folder when clicking **Process** to process the queue.  
Workaround: In Outlook **Account Settings**, double-click the account. Under **Offline Settings**, if you need to keep **Cached Exchange Mode** selected, use the slider to change the setting for **Mail to keep offline**.  
Records Manager processes all the mail that falls within the period selected here.
- The Outlook 2013 setting **Cached Exchange Mode** affects the HPE Records Manager in Outlook function **Clear Backlog** on a Linked Folder. When using it and email items are not available on the client computer because of this Outlook setting, the Linked Folder may become unusable for the duration of the Outlook session until it is restarted.  
Workaround: In Outlook 2013 **Account Settings**, double-click the account to change the setting for,

and on the **Server Settings** dialog, select **Use Cached Exchange Mode** and move the slider to the right to set it to **All**. Save the new settings.

- When loading linked folders into the **Manage Linked Folders** dialog box and the container record or Record Type cannot be populated correctly for some reason, the field may display an error message instead, which starts with three asterisks (\*\*\*)  
Solution: Remove the link that causes the issue, and then re-create it.
- Drafted e-mail messages that have the **Follow Up** flag and **Check in on send** set may create items in the Outlook **Conflicts** folder after sending. These items may not have the subject prefix **HPRM:** and need to be cleaned up manually.  
Workaround: For drafted e-mail messages with **Follow Up** flag, do not use **Check in on send**. Instead, after sending, check in the message to HPE Records Manager manually from the **Sent Items** folder.
- Email items that have their Sensitivity set as Private and are checked in using the HPE Records Manager Outlook Integration are unable to have their subjects modified and will not have HPRM prepended once they've been checked in. This cannot be rectified. A message will be in the log describing the behavior:  
"Catalogueltem: RE: Email Title - Subject prepend failed: This item has been marked as private by its author and cannot be changed."  
All other Sensitivity types (Normal, Personal or Confidential) should be prepended with HPRM:  
Subject
- **Check In on Send** is only supported for the primary Outlook account. When emails are sent from other accounts **Check In on Send** will not work - the item will be sent and appear in the users Sent Items folder for that account but will not be checked into HPE Records Manager. The user will have to check in these items manually if required.
- In Cached Exchange Mode, items that are marked Check in on Send will be checked into HPE Records Manager without a Message ID. This behavior is due to Exchange saving a copy of the email that has not yet had an Internet Message ID assigned in the **Sent – HPE Records Manager** folder in MS Outlook.  
If a recipient of this email checks in the received message and HPE Records Manager is checking for duplicate email messages, it will not trigger the duplicate warning, as the Message ID is used to determine duplicate emails. Subsequent recipients will not be able to check in the email as the email will have been assigned a Message ID.

#### Thin Outlook Integration

- When a new Appointment item is created in MS Outlook, the **Check In on Send** and **Style** options are not available as an Appointment cannot be sent. If the Appointment is changed to a Meeting item by adding an attendee, the HPE Records Manager tab options will not be refreshed to include the Style options.
- The option, **Check In on Send**, is not available on a Meeting item due to a Microsoft limitation.
- Meeting items are not automatically deleted regardless of the **Delete after check in** setting on the **Check In Style** used.

#### Lotus Notes integrations

To use the HPE Records Manager functions with Lotus Notes, you need to create a MAPI profile in Windows for the Lotus Notes email account first, as there is none by default. It is recommended that you do this by using the Windows Control Panel **Mail** function.

You also need to integrate HPE Records Manager with Lotus Notes by following the instructions in **RM8.3\_LotusNotesIntegration.pdf** in your HPE Records Manager installation folder's **Documentation** folder.

The following list shows the level of integration of HPE Records Manager rich client in Lotus Notes:

| Function   | Lotus Notes (32-bit) 8.5, 9.01 using client add-in | Lotus Notes (32-bit) 8.5, 9.01 using Thin Domino Service | Lotus Notes (64-bit) 8.5, 9.0.1 using Thin Domino Service |
|--|--|--|---|
| Checking in to HPE Records Manager               | Yes  | No   | No  |
| Checking in automatically from folder            | Yes, using queue processing                        | Yes  | Yes   |
| Checking in on send                              | Yes  | No   | No  |
| HPE Records Manager email notification           | Yes  | Yes  | No  |
| HPE Records Manager File/Send                    | Yes  | Yes  | Yes   |
| HPE Records Manager mail message form/send       | Yes  | Yes  | Yes   |
| Attach HPE Records Manager record to new message | Yes  | Yes  | Yes   |

- Lotus Notes document queues – only objects of type **Memo** and **Reply** are supported
- Lotus Notes mail databases - selecting a mail server displays mail databases that are inaccessible. Once you have successfully determined a Lotus Notes Server, a list of all the mail databases appears. The databases in this list cannot be hidden.
- Lotus Notes email addresses and HPE Records Manager **Locations** → **Mail To** - email addresses are checked in from Lotus Notes as Outlook X400 addresses. Lotus Notes provides an X400 address when an SMTP address is requested, causing the **Locations** → **Mail To** function to fail for a Lotus Notes email address. A workaround to this issue:
  - In the **Description** field of the email address properties, you can enter the correctly formatted email address and HPE Records Manager will use it as the recipient when you right-click and select **Mail To** from a Location.
- Only email messages of type **Memo** and **Reply** can be checked in to Records Manager from client add-in, Lotus Document queue processor or thin service integration
- When the RM Lotus Notes Thin Integration Service is in use in an organization, users should not rename their Lotus Notes client folder **HPE Records Manager** to **Records**, as it may cause the integration service to behave unpredictably because of the conflict this would create with the integration's folder named **Records** that hold checked in and failed message lists
- Thin integration: Mandatory metadata fields are not supported. The service rejects messages as failed when they are checked in under a Classification / type that requires mandatory metadata.

- Thin integration: The length of a Records Manager Classification/container code plus the length of the Classification/container name must not exceed 60 characters. This is due to the limit of the length of an email folder name in Lotus Notes.
- Thin integration: Changes to users' available Classifications and containers while the user has Lotus Notes email open are not reflected in their folders until they close and re-open Lotus mail
- When using Lotus Notes, the feature **Email Links** is not supported for Matter records

## HPE Records Manager DataPort

- See HPE Records Manager DataPort Help for a list of objects that are supported for import and export
- Numbering from container - the container must exist in the database before importing the record that gets its number from the container. If you have an import source that contains both the container and the record and the record is in either the same batch or an earlier batch than the container, the batch of records containing that record will not be imported.
- There cannot be hyphens (-) in Thesaurus terms. If you have a Thesaurus that contains terms with hyphens in them, modify the import file and replace the hyphens with another character before importing, for example, underscore (\_).
- Location associations – DataPort exports associations in a one-way relationship only
- DataPort does not export associated members because Locations of type Organization may have many thousands of members
- DataPort requires **Integrated Windows Authentication (Active Directory)** to be enabled as the dataset authentication method. If the dataset uses **Explicit Windows Authentication** as its authentication method, HPE Records Manager DataPort will not work.

## HPE Records Manager Enterprise Studio

- When running the HPE Records Manager Workgroup Server as executable file on a computer using Windows Vista or later, User Account Control (UAC) may cause the message **A request to the HPE Records Manager Workgroup Server <name> failed: Function request <name> for HPE Records Manager Workgroup Server <name> failed. Failed to setup a shared memory space for the file <path>. Access is denied. Running as user <name>.** and the operation may fail.

**Note:** Not relevant for normal HPE Records Manager operation, when the HPE Records Manager Workgroup Server runs as a service, not as executable.

Workaround: Turn off UAC before running the HPE Records Manager Workgroup Server as executable file.

- Time coordination - the Workgroup Server coordinates date and time details between the client computers and the HPE Records Manager Servers.  
It also prevents HPE Records Manager updates when the clock is more than 10 seconds different. This would indicate that someone has manually changed the clock on their local computer while logged into HPE Records Manager. If this is the case, they will need to log out and then log back in again to re-synchronize with the network clock.  
If your system clock date does not match the server date, your Workgroup Server access will be



denied.

Manually changing the time on the Workgroup Server causes it to stop processing events.

- Enterprise Studio does not report that the IDOL content index is full

## HPE Records Manager Image Scanner

- HPE Records Manager Image Scanner applies the last used scan settings by default, regardless of the settings in any third-party scanning applications. This behavior is by design and consistent with other professional business applications.

## HPE Records Manager Render

- When rendering documents on Windows Server 2012 inconsistent behavior may be observed due to a known printer driver issue. For example, the initial attempt to create a rendition of a document fails but the next attempt completes.

If this behavior is encountered Hewlett Packard Enterprise Development LP recommends running HPE Records Manager Render on Windows Server 2008 R2 where stability issues have not been observed.

- When you attempt to use rendering on a file and a dialog box appears in the file's authoring application, for example, asking for user details, rendering may fail.  
Workaround: Open the authoring application and answer the questions in the dialog before using it with HPE Records Manager Render.
- Rendering of .chm files to redactable or long-term renditions is not supported
- Rendering may fail with the error message **Failed to render document. Print job cancelled.** when the value for the setting **Timeout Waiting for Result** is too low, as rendering of some file types may take longer. Workaround: Stop the rendering service, set the value to 180-300, and start the rendering service again.
- Known issue - printing Microsoft Excel files is not supported by KeyView on Server 2012.  
Workaround: To be able to render Microsoft Excel files on Windows Server 2012, Microsoft Excel must be installed.
- Printing a VMBX file converts the file to a HTML file and then attempts to print the HTML file. To be able to render a VMBX file, you must have an application registered to handle printing HTML files.
- Known issue: When printing or Rendering an Excel spreadsheet from HPE Records Manager only the first sheet will be printed/rendered. This may be an issue if you want a representation of the whole document, such as a Long Term Storage rendition. This is the default behavior when printing an Excel document from Windows Explorer.  
Workaround: see [Setting Printing defaults for Excel Spreadsheets to enable them to be rendered for a workaround](#). Please note, this workaround will affect printing Excel spreadsheets from Windows Explorer.

## HPE Records Manager Web Client

- The HPE Records Manager Web Client product provides two views. The HPE RM Web Client, which is a modern responsive view and the HPE RM Web Client Classic, which is a traditional desktop view for the web. Both these views complement each other to provide easy access to organizational records across multiple platforms.

The responsive HPE RM Web Client is optimized for mobile devices and modern browsers delivering important core functions for end users. The classic view provides a rich feature set which works best with a traditional desktop browser view. Additional features will be added to the responsive HPE RM Web Client over time.

The responsive HPE RM Web Client has been developed to work on the next generation web and mobile platforms, such as, an iPhone, a tablet and new browsers.

Whilst both the individual pieces have respective strengths, both working together provide a seamless and robust solution for accessing HPE Records Manager via mobile devices and desktop browsers.

- When searching for records by using a phrase that contains special characters like parentheses like [ ( ) ] or colons ( : ), you need to leave them out in the case of the parentheses, or escape them by using double inverted commas around the entire phrase in the case of a colon.  
Examples: To search for a record with the title Report (2007) or Report [2007], use: **title: report 2007** To search for a record with the title report: 2007, use: **title: "report: 2007"**
- During the record creation process, when a MSG file is attached or dragged onto the record entry form, the Date Created field is removed from the form. This is due to a technical limitation that prevents client side applications from extracting date related metadata, such as the Date Created, from a MSG file. However, when the file is sent to the server and finally attached to the newly created record in HPE Records Manager, the date related metadata (Date Created) can be extracted and is appropriately specified on the record.
- When the field **Access Control** is added as a **Read Only** field on a Record Type entry form, it is displayed as if it is in edit mode in the HPE Records Manager Web Client and Web Client Classic. If a user, that does not have the required user permissions, edits this field and attempts to save the modification, they will be presented with an error, **You require one of the following permissions to be able to modify access control on a record: Modify records, Document update, Record administration**, and they will not be able to save their updates to the record.

## HPE Records Manager Workflow

- A sub-process must have at least two sub-Activities. When there is just one Activity, HPE Records Manager deletes the Activity and the sub-process.
- When a Workflow template that includes document placeholders is exported from, and imported into, an HPE Records Manager dataset, the document placeholders are not transferred. The required document placeholders will need to be manually added to the Workflow template after it has been imported.

## Key limits

### Data storage

**Note:** The following entities are a subset. The subset includes those key to HPE Records Manager operations and most frequently of interest. Further details can be provided on request. The number of records you can have in HPE Records Manager is mostly limited by the RDBMS system you are using.

If you are planning on creating a large quantity of records, please contact HPE Records Manager Product Support for configuration advice. A number of Records Manager customers have

experience with very large databases.  
 \* Recommended, but not strictly enforced upper limit. Beyond this limit, HPE Records Manager has not been tested extensively and may be subject to performance degradation.

| Entity                                 | Limit  |
|--|--|
| Record Types                           | 1024 *   |
| Record parts                           | 99 *   |
| Records in container                   | 300 *  |
| Security levels                        | 99   |
| Caveats                                | 512  |
| External links                         | 20   |
| Advanced search lines                  | 20 *   |
| Offline Records documents              | 500 * per user per dataset   |
| Offline Records folders                | 60 *   |
| Versions                               | 99 *   |
| Decimals and currency                  | A maximum of 15 digits before the decimal place, up to 8 decimal places    |
| Edit box drop-down history             | 25   |
| Recent Containers and Recent Documents | 25   |
| Document content index database        | 10 million documents per IDOL content index server (5 million recommended) |

## Field length

| <b>Entity</b>                           | <b>Character limit</b> |
|---|------------------------|
| Record Number                           | 50                     |
| Record Type Name                        | 50                     |
| Part Numbers                            | 2                      |
| Foreign Barcode                         | 30                     |
| Record Title (structured text)          | 512                    |
| Record Title (free text)                | 254                    |
| Thesaurus Term                          | 100                    |
| Classification Plan number              | 5                      |
| Classification Plan level name          | 100                    |
| Security Level Name                     | 50                     |
| Security Caveat Name                    | 50                     |
| Person Surname                          | 100                    |
| Organization Name                       | 200                    |
| Group Name                              | 200                    |
| Position Name                           | 200                    |
| Location Telephone Number               | 30                     |
| Location Email Address                  | 255                    |
| Person Initials                         | 25                     |
| Logs in as (user name plus domain name) | 255                    |

| Entity                    | Character limit |
|---------------------------|-----------------|
| Notes                     | 65536           |
| External reference        | 50              |
| Workflow Name             | 100             |
| Workflow Activity Name    | 100             |
| Retention Schedule title  | 200             |
| Retention Schedule number | 30              |
| Consignment number        | 50              |
| Priority                  | 5               |
| Additional text Field     | 65535           |
| Lookup Set name           | 50              |
| Lookup Set items          | 1024 *          |
| Index word                | 50              |

## Obsolete Features

### HP Records Manager 8.0

|       |   |
|-------|---|
| 35419 | <p><b>FTP Document Stores need to be deprecated.</b><br/>Support for FTP document store has been removed.</p>   |
| 45597 | <p><b>HP Records Manager 8.0 - References to Novell GroupWise needs to be removed from help files and installation PDFs as it is no longer supported.</b><br/>Support for Novell GroupWise has been removed. References to Novell GroupWise has been removed from help files and installation PDFs</p>  |
| 45598 | <p><b>HP Records Manager 8.0 - Novell Integration option should be removed from the install and the documentation needs to be updated accordingly as it is no longer supported.</b><br/>Support for Novell Integration has been removed. The Novell Integration option has now been removed from the install and the documentation updated accordingly.</p> |
|       | <p><b>IAP Document Stores need to be deprecated.</b><br/>Support for IAP document store has been removed.</p>   |

### HP Records Manager 8.2

#### Labelink

Due to the discontinuance of ColorBar Gold APIs in ColorBar version 8, Labelink is obsolete from HP Records Manager 8.2.

For details on how to produce a tab delimited text file that can be imported into ColorBar, please see the HPE Records Manager and the HPE Records Manager DataPort help files.

#### SDK Release Notes

Customers developing applications against the HPE Records Manager SDK should refer to the .NET and COM SDK manuals for the most current information. These manuals are located in the HPE

Records Manager installation directory and on the product media/ISO image.

|              |  |
|--------------|--|
| <p>47613</p> | <p><b>TRIMViewer menus not working correctly when document is displayed non-modally.</b><br/>                 In HPRM 8, the use of the following ActiveX controls will no longer be supported:</p> <ul style="list-style-type: none"> <li>• TRIMedit</li> <li>• TRIMtreeBox</li> <li>• TRIMviewer</li> </ul> <p>These controls are imported from the tsjocx.dll. Whilst these controls will continue to be shipped, developers will be using them at their own risk.</p> <p>The HPE Records Manager SDK support team will not be able to take on any investigative action should problems arise in using these controls.</p> <p>It should be noted that the HPRM COM SDK will continue to be a supported product.</p> |
|--------------|--|

## HPE Records Manager 8.3

- Soap Web Service - replaced by ServiceAPI
- Directory Synchronization - In HPE Records Manager 8.3, HPE RM Directory Synchronization has been obsoleted. The Instant On feature introduced in HP Record Manager 8.2 provides an alternative method for adding new users to HPE Record Manager.

Customers should assess if Instant On satisfies requirements for onboarding users to HPE Records Manager. Alternatively, HPE Records Manager APIs provide the necessary integration points for customers to develop their own custom integration solution.

- Worksite Integration is no longer a part of the Hewlett Packard Enterprise Product Portfolio.
- iUS Integration is no longer a part of the Hewlett Packard Enterprise Product Portfolio.
- COM SDK ActiveX controls - these were removed from support in HPE Records Manager 8.2, but continued to be supplied. HPE Records Manager 8.3 will begin the process of removing this code where it is no longer required for our own internal use.