

# HP Records Manager

Software Version: 8.11

## Release Notes

Document Release Date: June 2015

Software Release Date: June 2015



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# HP Records Manager Release Notes

## Introduction to HP Records Manager 8.1

HP Records Manager 8.1 is a next generation enterprise scalable electronic document and records management system, designed to be a key component of HP Autonomy's Information Governance framework delivering policy-based, secure, accountable and compliant management of all business documents and records held by the contemporary enterprise. Records Manager 8.1 continues our unified records management strategy, merging three proven and successful records management products into a single best of breed solution. HP Records Manager 8.1 is the first release that supports upgrades from all three products, HP TRIM, Autonomy Records Manager and Meridio, using out of the box upgrade tools.

The major themes of HP Records Manager 8.1 include:

- Best of Breed Records Management
  - Upgrade tools for all legacy products
  - Advanced disposal processing
  - Physical records management enhancements
- Enhanced Usability
  - Workflow integrated in new Web User Interface
  - Web client based request queue processing
- Office 365 Integration
  - Thin integration with Office applications
  - Server side email capture from Exchange
  - App based integration for SharePoint

HP Records Manager 8.1 is designed to the International Standard of Records Management (ISO 15489:2001), and elements of ISO16175: Principles and Functional Requirements for Records in Electronic Office Environments.

## Overview of HP Records Manager 8.11

This first minor minor release includes all fixes and enhancements that were shipped in the previous release of HP Records Manager. For details of the previous release, please refer to the relevant release notes.

For technical details, including the support matrix, refer to **RM8.11\_Spec.pdf** and **RM8.11\_Install.pdf**

For the authoritative listing of Change Requests included in this release, please see

[https://softwaresupport.hp.com/group/softwaresupport/search-result/-/facetsearch/document/LID/TRIM\\_00044](https://softwaresupport.hp.com/group/softwaresupport/search-result/-/facetsearch/document/LID/TRIM_00044)

## Enhanced Features

### HP Records Manager

#### Updated User Permissions

In HP Records Manager 8.11 Patch 2, as a result of feedback from our customer and business partner base, there improvements have been made to the user permissions in HP Records Manager 8.11 Patch 2.

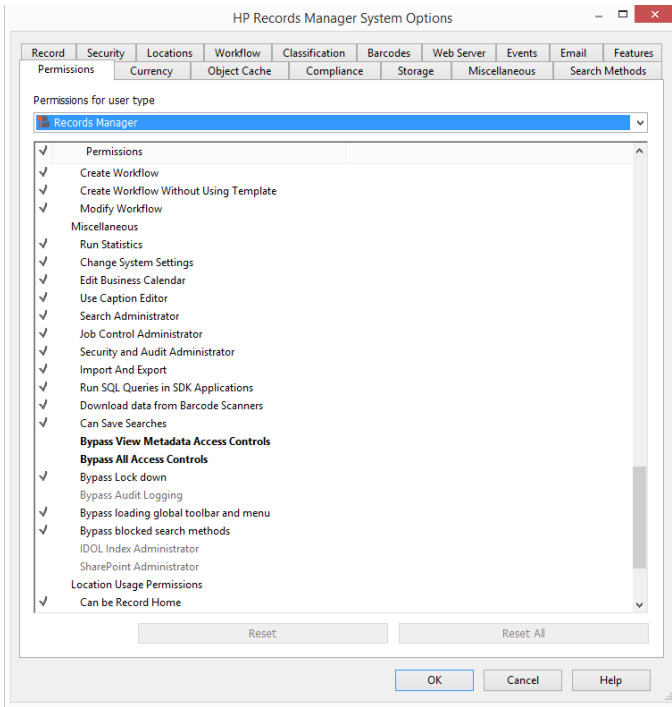
The following permissions have been modified as below:

Permission	User Type pre-8.11 Patch 2	User Type in 8.11 Patch 2
Reassign Actions/Activities	Records Co-ordinator	Knowledge Worker
Reschedule Actions	Records Manager	Records Co-ordinator
Complete Actions	Knowledge Worker	Contributor
Modify External Location	Records Co-ordinator	Knowledge Worker

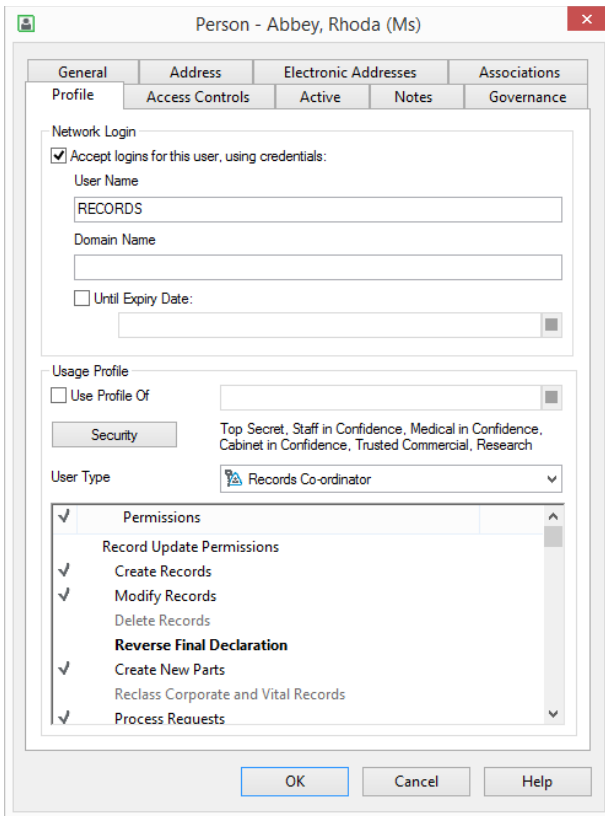
There have also been changes made to allow HP Records Manager administrators to add or remove optional Permissions for particular user types. These changes allow HP Records Manager administrators to either modify an individual user profile or as a global permissions change via the **System Options > Permissions** tab. To utilise these changes, a dataset Schema upgrade to Schema number 257 is required after upgrading to HP Records Manager 8.11 Patch 2.

The optional permissions that can be enabled or disabled are displayed in **bold** text, e.g.

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Changes to an individual user's set of user permissions is done via the Person Location Properties > Properties tab. An administrator can enable or disable the default user permissions, as well as the optional permissions, which are displayed in **bold text**.






## Optional User Permissions

User Type	Optional Permissions
Records Manager	Bypass View Metadata Access Controls Bypass All Access Control
Records Coordinator	Bypass View Metadata Access Controls Bypass All Access Controls Bypass Lock down
Knowledge Worker	Modify Record Additional Field Values Bypass View Metadata Access Controls Bypass All Access Controls Bypass Lock down Bypass loading global toolbar and menu Bypass blocked search methods
Contributor	Bypass View Metadata Access Controls Bypass All Access Controls Bypass Lock down Bypass loading global toolbar and menu Bypass blocked search methods
Inquiry User	Bypass View Metadata Access Controls Bypass All Access Controls Bypass Lock down Bypass loading global toolbar and menu Bypass blocked search methods

## Saved Searches Conversion Utility

In HP Records Manager 8.0, design changes to the Search module meant that Saved Searches that were created in HP TRIM 7.x would not work in HP Records Manager 8.x. In HP Records Manager 8.11, a conversion utility has been added to the Administration menu which converts older saved searches into the required format.

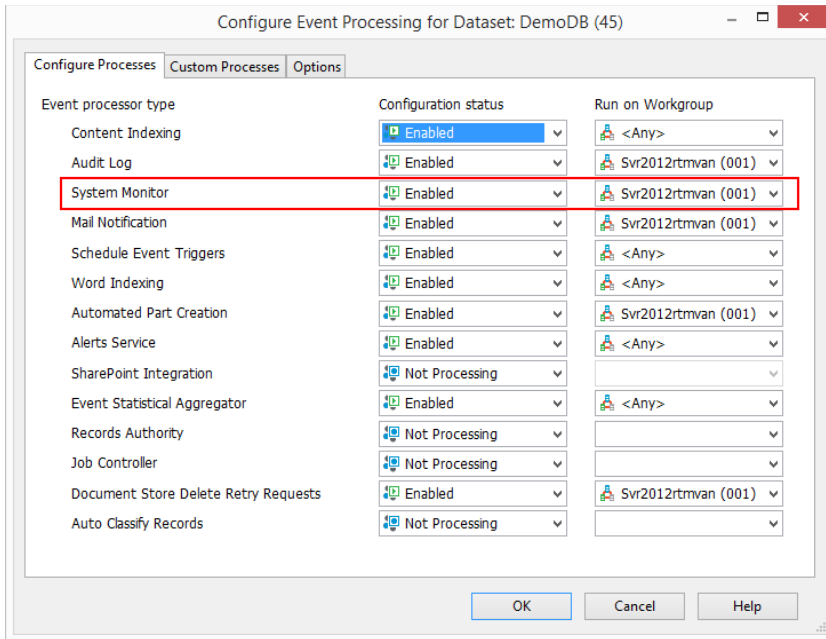
### Note

-  Depending on the complexity of the Saved Search, the conversion may not be successful. In particular, action tracking searches and communications searches are not converted in this version of the conversion program. Searches that fail to convert are left as “old format” searches in the system.

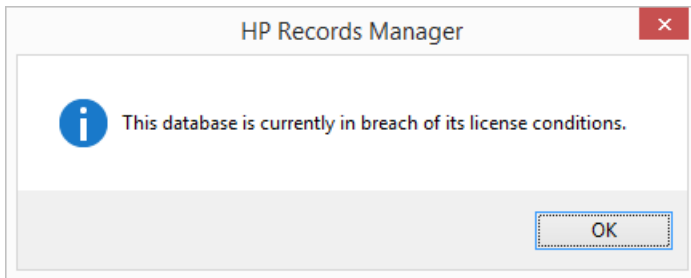
## License Counter Monitoring

In HP Records Manager 8.11, using Event Processing, a license counter monitor has been implemented. Based on the current license usage for seats and volumes, the System Monitor Event Processor, runs a licensing calculation check every for 4 hours.

## HP Records Manager 8.11 Release Notes

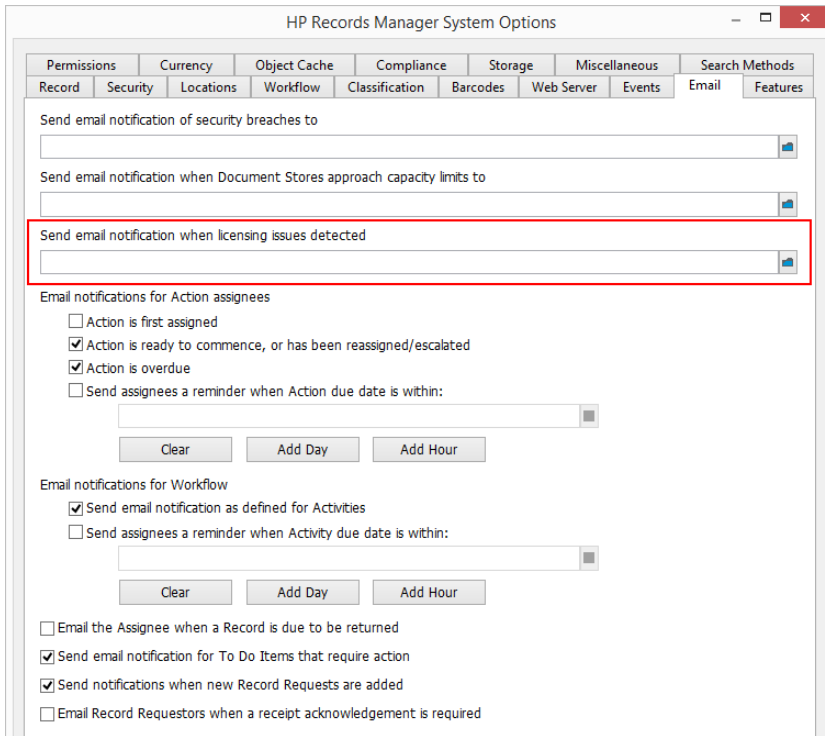


If the license conditions are breached, a message is sent to the Workgroup server. This message is stored on the Workgroup server and is forwarded to all other Workgroup servers in the network. A message is displayed to users connecting, using HP Records Manager or HP Records Manager Desktop, to the Workgroup servers.



HP Records Manager 8.11 can be configured to send an email about licensing issues to the nominated person; this person is specified via the HP Records Manager Administration - System Options. The email is sent once every 7 days whilst the license is in breach.

# HP Records Manager 8.11 Release Notes



Wed 10/29/2014 12:57 PM

HP RM > <<petera@localhost.com>>

Your current HP Records Manager usage is in breach of your license

To

HP Records Manager current licensing details for dataset DemoDB:

Administrator/Records Manager: licensed for 10 seats, currently using 11 seats, after adjustments -1 seats are available. License capacity limit exceeded.

Records Co-ordinator: licensed for 100 seats, currently using 4 seats, after adjustments 96 seats are available.

Knowledge Worker: licensed for 100 seats, currently using 4 seats, after adjustments 96 seats are available.

Contributor: licensed for 100 seats, currently using 0 seats, after adjustments 100 seats are available.

Inquiry User: licensed for 100 seats, currently using 4 seats, after adjustments 96 seats are available.

--

This email Message has been automatically generated by HP Records Manager (DemoDB).

Once the licensing breaches are resolved the message is cleared from the memory of all Workgroup servers and users will no longer get the login message.

If the license monitor determines that any counter is over 90% used a warning email will be sent to the specified licensing person. This warning email is sent once every 90 days while the license is approaching its limits.

# HP Records Manager 8.11 Release Notes



Wed 10/29/2014 12:57 PM

HP RM > <<petera@localhost.com>

Warning: a HP Records Manager licensing limit is getting close

To

HP Records Manager current licensing details for dataset DemoDB:

Administrator/Records Manager: licensed for 2 seats, currently using 2 seats, after adjustments 0 seats are available. License capacity usage is over 90 percent.

Records Co-ordinator: licensed for 3 seats, currently using 3 seats, after adjustments 0 seats are available. License capacity usage is over 90 percent.

Knowledge Worker: licensed for 3 seats, currently using 0 seats, after adjustments 3 seats are available.

Contributor: licensed for 3 seats, currently using 0 seats, after adjustments 3 seats are available.

Inquiry User: licensed for 3 seats, currently using 0 seats, after adjustments 3 seats are available.

Data volume: licensed for 1000 Records, currently using 0 Records.

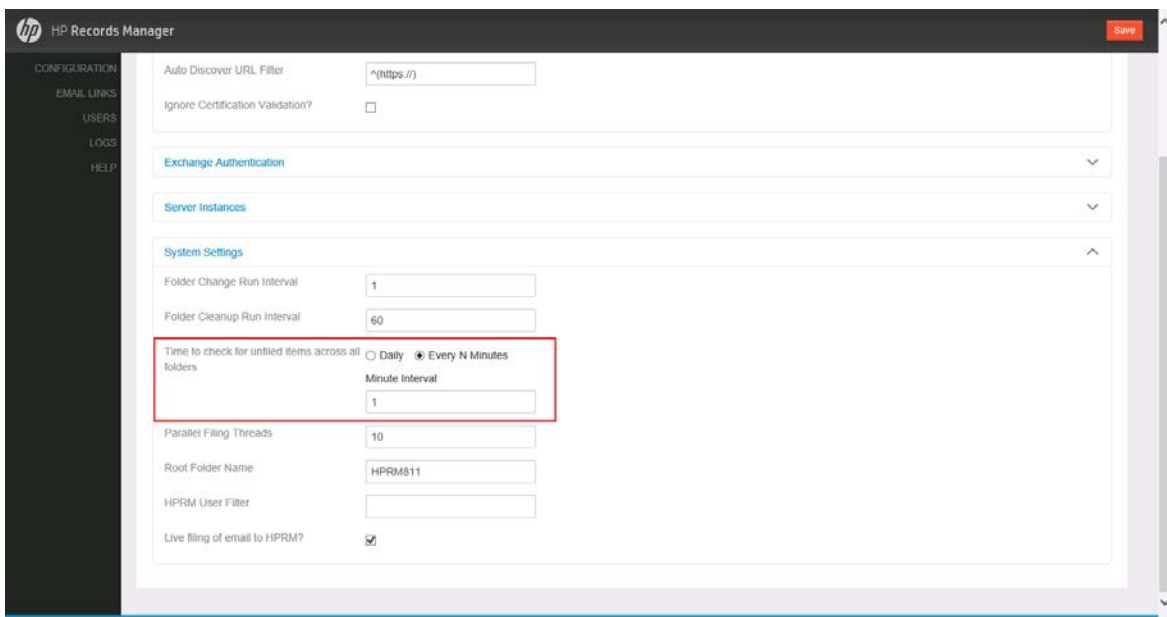
--

This email Message has been automatically generated by HP Records Manager (DemoDB).

## ExchangeLink

In previous releases of HP Records Manager 8.1, the ExchangeLink feature only supported Exchange 2013 (on premise and Office 365). In HP Records Manager 8.11, the ExchangeLink feature has also been validated against Exchange 2010 SP3. The ExchangeLink on Exchange 2010 differs to the Exchange 2013 version in that users with Exchange 2010 mailboxes must rely on the scheduled ExchangeLink process to scan their linked folders for mail to file.

To assist administrators in improving the experience of filing emails, ExchangeLink now allows a scheduled scan of mailboxes to be run on either a daily basis, or based on an interval measured in minutes.



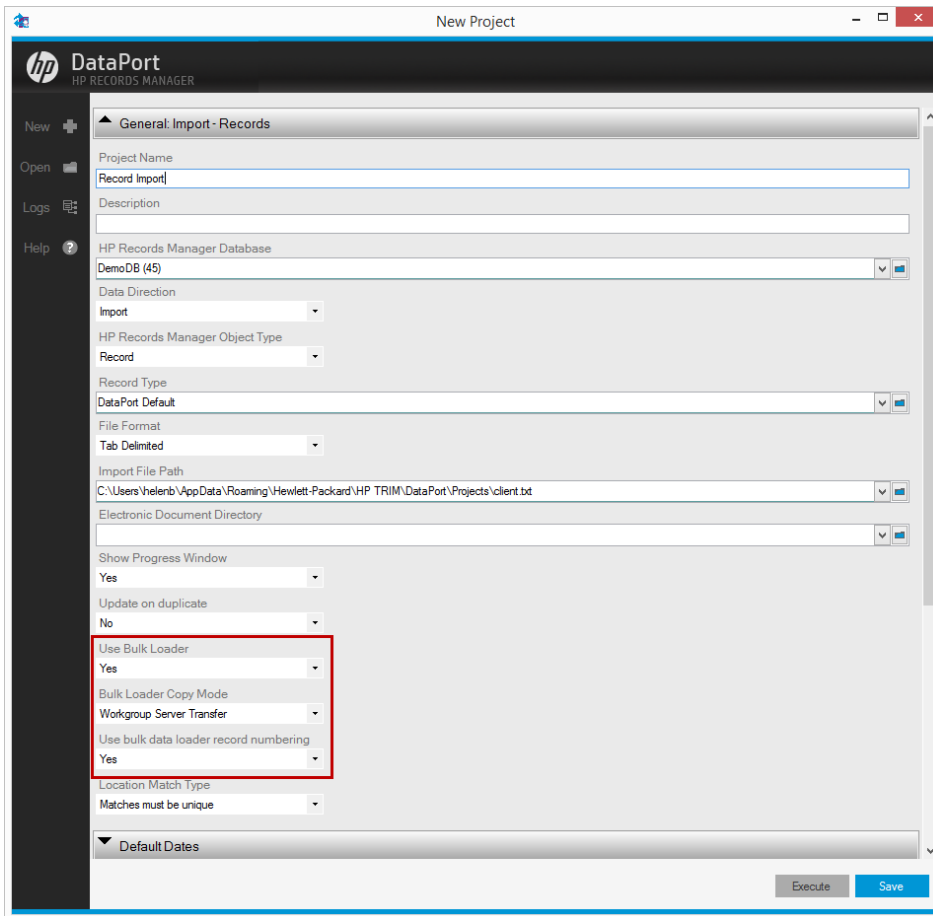
## Supported IDOL Version

In HP Records Manager 8.11, the version of IDOL has been upgraded from IDOL 10.6 to IDOL 10.8.

## HP Records Manager DataPort

### Bulk Loader options

HP Records Manager DataPort utilizes Bulk Loader when importing records. HP Records Manager DataPort has been enhanced in the 8.11 release to give users the option to opt in or out of using Bulk Loader when importing records. When using Bulk Loader to import records, it is essential that the user executing the import has **Record Administration (Restricted)** permission.



HP Records Manager DataPort also now gives users who opt to use the Bulk Loader to import records to select the copy mode to use. Users can select from:

- **Workgroup Server Transfer** - this option is the standard method for transferring documents to an electronic store. The process is managed by the Workgroup server and therefore uses the file permissions assigned to the HP Records Manager Services user, for example trimservices. It is slightly slower to add the documents but no special file system permissions are required on the Document Store.

- **Windows File Copy** - this option uses Windows File operation to copy the files from the source directly to the Document Store. This option is quicker than the **Workgroup Server Transfer** but write access to the Document Store is required by the user running HP Records Manager DataPort.
- **Windows File Move** - this option uses the Windows File move operation which names the existing file to the Document Store location. This option will remove the documents from the source directory. This option is faster than the others, particularly if the File Move is being done on the same disk volume as the Document Store. With the Windows File Move, the files should be on the same volume as the e-store, otherwise it reverts to being a Copy operation.

## HP Records Manager Web Client

### Time Zone Enhancement

When setting up the HP Records Manager Web Client, web administrators no longer have to ensure that the clients connecting to the Web Server are in the same time zone. In HP Records Manager 8.11, the HP Records Manager Web Client sends a time zone offset to the Web Server, which ensures the client date and time information is respected appropriately at the Server when a record is created.

Additionally, when a user searches for a record using a date search method, such as DateCreated, the HP Records Manager Web Client will display the results as per the client's data and time information with the correct date specific metadata.

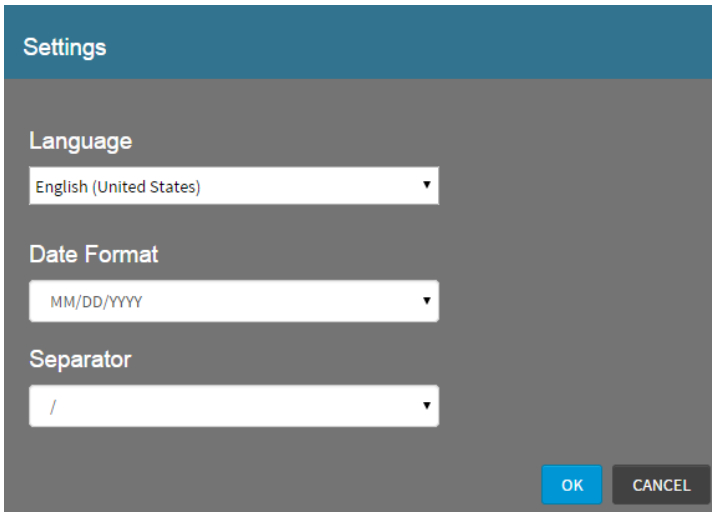
### Date Format Settings

In HP Records Manager Web Client 8.11, we've introduced the ability for users to be able to select the Date Format and Separator. From the Settings dialog, users can select from the Date Formats:

- YYYY/MM/DD
- MM/DD/YYYY
- DD/MM/YYYY

The available date Separators that users can select from are:

- /
- -
- .



## Single Sign On

In addition to supporting Windows authentication running on IIS, the HP Records Manager Web Client now supports Single Sign On using ADFS for authentication.

Single Sign On is used to refer to the task of identity federation, which is authenticating with a web application located outside your organisation boundary using your organisation credentials. This might be achieved in a variety of ways, such as, a WS-Fed solution like ADFS (or Azure AD) or one of the many public SAML providers (OneLogin, Ping Identity and Okta).

## HP Records Manager for SharePoint Integration

### Note

► The following enhancements apply to the SharePoint 2013 version of the HP Records Manager for SharePoint Integration only.

## Security and access controls

SharePoint items that are under the management of HP Records Manager may have security and access controls applied to the corresponding record. In 8.11, this security and access control can be applied to the SharePoint list item so that only those with the correct permissions in HP Records Manager can access the item in SharePoint as well.

This feature will also limit the menu options that SharePoint presents to the user based on whether they have permission to edit a record or just to view it.

Security can be turned on and off at individual site level or globally so that organisations can apply security and access controls only to the content that requires it.

## New column types

SharePoint items that are under the management of HP Records Manager will have fields on the record that are based on HP Records Manager locations, records and classifications. When these

types of fields are mapped to columns in SharePoint there are challenges in being able to use these values.

HP Records Manager 8.11 introduces several new types of fields:

- Location based fields: allows searching and selecting existing locations from HP Records Manager as well as the ability to create a new location from inside SharePoint.
- Record based fields: allows searching and selecting existing records from HP Records Manager.
- Container based fields: allows searching and selecting existing containers from HP Records Manager.
- Classification based fields: filtered classifications are shown based on the user's permissions in HP Records Manager.
- Read only fields: these are displayed in a read only format.

## Relationships

Managed SharePoint items can be related to other records in HP Records Manager using the new relationships dialog accessible from the management details page.

## Contact management

The contacts associated with managed SharePoint items can be managed using the new Contacts dialog accessible from the management details page.

## Performance improvements

Several performance improvements have been introduced in HP Records Manager 8.11. It is now possible to specify the number of simultaneous jobs that a particular Workgroup server can process. This, in some configurations, will permit larger throughput of jobs leading to better performance.

Jobs are also now assigned a priority. Jobs that are needed more urgently than background tasks, will be performed ahead of these types of jobs regardless of when they were placed in the queue.

## Support for multiple farms

The product now supports the management of multiple SharePoint farms by a single Workgroup server. Prior to HP Records Manager 8.11, a Workgroup server could only have affinity with a single farm. This restriction has now been removed.

## DoD certification

8.11 has achieved DoD 5015.2 certification



## Management injectors

HP Records Manager 8.11 supports the use of custom management injectors. This allows you to inject custom behavior

- before a record is created
- after a record is created
- before a record is updated
- after a record is updated

## Enhancement Requests included in this Release

49994	<p><b>HP Records Manager - Saved Searches Conversion - Enhancement request for a migration tool to assist with exporting saved searches from earlier versions of TRIM and importing them to HP Records Manager.</b></p> <p>Fixed. A new migration tool has been added to the administration menu of trim.exe. It attempts to convert all the old saved searches. In some cases there will be a failure due to the inability of the conversion code to handle some of the more complex cases - these will need to be converted manually.</p>
52272	<p><b>Relax Client / Server Version Mismatches to support from 8.1 onwards that all combinations of client/server that are on the minor will work without incident.</b></p> <p>Enhanced. Product behavior enhanced by relaxing client/server version mismatches so as to remove impediments to upgrading to latest minor-minor.</p>
52414	<p><b>ExchangeLink - support for Exchange 2010.</b></p> <p>Enhanced. Exchange 2010 is supported in HP Records Manager ExchangeLink 8.11.</p>
52489	<p><b>ExchangeLink - document the need for local admin.</b></p> <p>Documented. Both Admin Console and Sync Server either need to run as a user in the Local Admin group or must be given permission to self-host their respective URLs. This permission can be given using the Windows netsh command, for example: netsh http add urlacl url=http://*:1337/user=my_domain\my_user.</p>
52662	<p><b>Documentation - Allow ASP.NET v2.0.50727 Web Service Extensions in IIS 7.</b></p> <p>Updated. Replaced the version specific instructions with a URL that takes users directly to the instructions on how to enable ASP.NET v2.0.50727 Web Service Extensions.</p>
52819	<p><b>ExchangeLink - Ability to choose whether to Sync all linked folders on startup.</b></p> <p>Enhanced. Users can to choose whether to Sync all linked folders on startup.</p>
52866	<p><b>During Record Action search clicking on 'Enter the Record Action to search by' KwikSelect returns a list of all records that have any Action attached.</b></p> <p>Fixed. During Record Action search the list of Actions can be now be accessed when setting the search style option as Record Actions with matching text value for Action.</p>

52874	<b>HP Records Manager - IDOL - Documentation needs to be updated for version 10.8 Content Indexing installation and configuration.</b> Updated. Relevant sections have been updated in the RM8.11_IDOL_DCI_Install_Config.pdf
52952	<b>Microsoft Office AddIn - need to deal with Inquiry users and Contributors better.</b> Fixed. The Thin Office integration addin unloads when a HP Records Manager Contributor or Inquiry User attempts to use the integration.

