

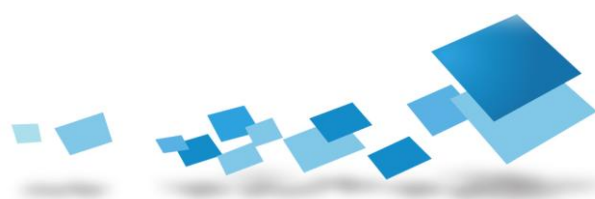
Open Text Document Management,
eDOCS DM Release Notes
Version 5.2.1 CU5

April 29, 2010



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1 Introduction

These Release Notes describe the latest updates to eDOCS DM Version 5.2.1 CU5. Open Text recommends that you read these Release Notes in conjunction with the documentation included with the software package. If any conflicts exist, the Release Notes supersede the other documentation.

We also recommend that you check the [Open Text Knowledge Center](https://knowledge.opentext.com/) (<https://knowledge.opentext.com/>) for any patches or documentation updates that may have been posted after the initial release of eDOCS DM Version 5.2.1 CU5.

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2 About eDOCS DM 5.2.1 CU5

The DM 5.2.x service and maintenance releases are cumulative. That is, a later service or maintenance release will contain everything that an earlier service or maintenance release contained, plus any new modifications. A list of Fixed Issues in contained in this release can be found [here](#).

For information about issues fixed in Releases 5.2.1 CU4 or previously, see the release notes for those releases:

[DM and RM 5.2 Release Notes](#)

[Using Open Text eDOCS DM 5.2 Software](#)

[DM and RM 5.2.1 Release Notes](#)

[DM and RM 5.2.1 CU1 Release Notes](#)

[DM and RM 5.2.1 CU2 Release Notes](#)

[DM and RM 5.2.1 CU3 Release Notes](#)

[Using Open Text eDOCS DM 5.2.x Software](#)

[DM and RM 5.2.1 CU4 Release Notes](#)

2.1 New Features

2.1.1 Dynamic Views Custom Security (DM-15685)

As of DM 5.2.1 CU5, you can override the set security on any available Dynamic Views level node, such as Client, Matter, or Sub-matter if you have the rights to do so. This means that any security set on a level that is pushed down to all documents or items saved within can be altered by a user with applicable rights. Just as with default DM security, the security is set through the Access Control List using the Trustee list.

When you save a document to a secured level, either by selecting the Client or Matter on the Profile form when saving, or by dropping a document on the secured level, DM first checks the Matter to see if it has security set, and if so, that security is applied to the document. If the Matter does not already have security set up, DM checks the Client level, and if security exists there, the document inherits that security.

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There are three updates for this feature in the "[DM/RM 5.x Documentation Updates](#)" document, which can be found in the "DM/RM Administration Guide," "DM/RM Data Dictionary," and "Using DM Extensions" chapters.

2.1.2 Support for Lotus Notes 8.5.1 (DM-19693)

Lotus Notes 8.5.1 was tested and is supported in conjunction with eDOCS DM 5.2.1 CU5.

2.1.3 Support for Windows 7 – 32 bit version (DM-19694)

Microsoft Windows 7 – 32 bit version was tested and is supported in conjunction with eDOCS DM 5.2.1 CU5.

2.1.4 Support for GroupWise 8 (DM-17719)

Novell GroupWise 8 was tested and is supported in conjunction with eDOCS DM 5.2.1 CU5.

2.1.5 Configure OK and Cancel Buttons (DM-19637)

A Save User Interface configuration setting was added to un-hide or hide the profile form ok and cancel buttons. The setting is called UseOKAndCancel and is set to FALSE by default. Setting it to true will hide the OKCancel panel and use the button location as defined in the form definition.

To move the OK and Cancel buttons to be on the form instead of the bottom panel, add the following to the SaveUIconfig.xml file:

```
<UseOKCancelOnForm>True</UseOKCancelOnForm>
```

2.1.6 PreSave DoAction event for Save User Interface

The DoAction PreSave event has been documented in the "[DM/RM 5.x Documentation Updates](#)" document ("DM Extensions API Reference Guide" chapter). The following text now appears:

A third action is PreSave. This action is called right before the saving of the profile object occurs, which is after the Save button is clicked, but before the data is written to the database. The IProfile object is passed as the setData parameter (the outData and the return value are ignored). This will allow profile data to be manipulated before the object is saved.

This information has been added to the already-existing "Adding an Item to the Navigation Pane of the DM 5.2x Save User Interface" section.

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2.1.7 Documentation Updates for DMViews.dat configuration (DM-19440)

The following information has been added to the "DM Administration Guide" chapter of the "[DM/RM 5.x Documentation Updates](#)" document:

Using the dmviews.dat File to Configure Views for Multiple Users

After a user opens Microsoft Outlook, accesses the DM node, and then closes Outlook, the dmviews.dat file is created, by default, in C:\Documents and Settings\\Application Data\Hummingbird\DM\Settings.

The dmviews.dat file is an OLE Structured Storage file with a section for each view that is stored. The name of each section comes from the DetailColKey property for the folder in DM Extensions; all folders with the same DetailColKey will share the same view. You can use this file to configure a default view and then push the file out to other users, by replacing their dmviews.dat file with the one you configure.

To configure a default view in DM Extension for Microsoft Outlook:

1. Locate and delete the dmviews.dat file in C:\Documents and Settings\\Application Data\Hummingbird\DM\Settings.
2. Start Microsoft Outlook.
3. Click View>Current View>Customize Current View.
4. The Customize View: PowerDOCS dialog box appears, and configure any of the following:
 - Fields
 - Group By
 - Sort
 - Filter
 - Other Settings
 - Automatic Formatting
 - Format Columns
5. Click OK.
6. Use the View menu to configure any other type of view, such as the Reading Pane.
7. When you are finished, exit Microsoft Outlook.
8. A new dmviews.dat file is created in the default location, which now contains the configuration information for the views in Microsoft Outlook. Copy the dmviews.dat file and paste it in any other users ...\Hummingbird\DM\Settings location to use the same views configuration. This will replace their current dmviews.dat file.

2.1.8 PowerPoint 2007 Reuse Slides feature (DM-20025)

The Microsoft PowerPoint 2007 Reuse slide feature has been integrated to call the DM Quick Retrieve screen when performing the following steps:

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1. In the register "Home" in the Ribbon "Slides" choose the down arrow within the icon "New Slide" and choose "Reuse Slides...".
2. On the right side the window "Reuse Slides" appears and if you choose "Open a PowerPoint File"

2.1.9 Digital Signature and Mark As Final Features Disabled (DM-20193)

The Microsoft PowerPoint and Excel 2007 object model did not have any means to integrate the Digital Signature or Mark as Final features. Further research will need to be done with Microsoft to determine if we can integrate this feature with DM or not.

In the mean time for eDOCS DM 5.2.1 CU5 we have disabled these Office menu items on the Prepare menu for Add Digital Signature and Mark as Final.

In addition the Signature Line item on the Insert menu has also been disabled: NOTE the Signature Line item on the Insert menu does not exist in Microsoft PowerPoint.

Customers can optionally re-enable the menus with the understanding that these items will cause unmanaged documents and missing edits using the following registry key values.

HKLM\Software\Hummingbird\Hummingbird DM Application
Integration\Installation\Microsoft

DWord values set to 1 to re-enable the menus

SHOW_MSO_DIGITALSIGNATURE
SHOW_MSO_MARKASFINAL

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3 Packaging and Documentation

The documentation and help files in DM 5.2.1 CU5 are those delivered with DM 5.2.1. Consult these for the core documentation set; however, you must also read the following documents to obtain new or corrected documentation:

New Documentation—The [Open Text - Using eDOCS DM 5.2.1 Software](#) document contains specific information related to the DM 5.2 release, including using Microsoft Office 2007, Windows Vista, Dynamic Views, DM Extension for Lotus Notes, updates to Dynamic Views documentation, and how to setup Project 2007 with Interceptor. This new information is **not** located within the original core documentation set.

New Documentation and Updates—The [DM/RM 5.2.x Documentation Updates](#) document contains new and updated documentation since the original release of DM 5.2.1, including information as a result of service releases and maintenance releases. This document also contains clarifications to existing documentation.

Documentation Notes

The following topics have been added to the [“DM/RM 5.x Documentation Updates”](#) document:

“DM Administration Guide” chapter:

- Restricted User Accounts Not Supported in DM
- Using the dmviews.dat File to Configure Views for Multiple Users
- Using Custom Dynamic Views Security

“DM Extensions API Reference Guide” chapter:

- The DoAction method’s PreSave action is described in the “Adding an Item to the Navigation Pane of the DM 5.2x Save User Interface” section.

“DM/RM Data Dictionary” chapter:

- The INH_LUP_SEC_FROM column value changes are listed in the “New Columns in PROFILE Table” section.

“Using DM Extensions” chapter:

- Using Custom Dynamic Views Security

Windows Help (WinHelp) Not Included in Windows Vista

The Help files delivered with DM 5.2.1 CU5 were created in Windows Help (WinHelp) format. The Windows Help format is not supported, nor included, with Windows Vista operating systems. You can download the **WinHelp.exe** application and use it to view

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DM Help files on Windows Vista operating systems. Download the Winhelp.exe application from Microsoft's web site at the following location: <http://go.microsoft.com/fwlink/?LinkID=82148>. However, the following known issue has been reported by Microsoft. When you open a Help topic (by pressing **F1** or by selecting **Help>Contents and Index**), the following error message appears: "*There was a problem running the macro. (1037).*" After this initial error, you can continue using the Help files. For more information and workarounds to this issue, consult Microsoft's Article ID 917607 at the following location: <http://support.microsoft.com/kb/917607>.

NOTE: The Help files do not contain any new information for DM 5.2.1 CU5. You must consult the ***Open Text - Using eDOCS DM 5.2.1 Software and DM/RM 5.x Documentation Updates*** documents for all new information pertaining to this release.

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4 Supported Environments and Compatibility

The following tables list the supported environments in DM 5.2.1 CU5.

4.1 Server Machines

4.1.1 DM Server

<i>Processor</i>	Dual Pentium 4, 1.9 GHz or better
<i>Memory</i>	2 GB or greater (1 GB minimum)
<i>Operating System</i>	Microsoft Windows 2003 Server SP2 Microsoft Windows 2000 Server
<i>Databases</i>	Microsoft SQL Server 2000 and 2005 (Compatibility Mode), 2008 (Compatibility Mode) Oracle 10g Release 2 and Oracle 11g

NOTES: For optimal SQL server performance, we recommend a dedicated server-class machine with a minimum of 1 GB RAM.

The system requirements for DM Workflow, RM, and Collaboration DM Server Integration are the same as for DM. The DM Server machine requires approximately 60 MB of disk space for Collaboration DM Server Integration.

4.1.2 Document Server

<i>Operating System</i>	Novell Netware 6.5 Microsoft Windows 2003 Server Microsoft Windows 2000 Server EMC Centera
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4.1.3 DM Web Server

<i>Processor</i>	<i>Dual Pentium 4, 1.9 GHz or better</i> These processor requirements are for dedicated DM Server machines. If SQL engines and/or DM Web Server are installed on the same machine, additional processing power and memory will be required.
<i>Memory</i>	2 GB or greater (1 GB minimum)
<i>Operating System</i>	Microsoft Windows 2003 Server SP2 Microsoft Windows 2000 Server
<i>Web Server</i>	Internet Information Server (IIS) 5.0 or 6.0
<i>Client</i>	Internet Explorer 6.0,7.0,8.0

NOTE: The system requirements for DM Workflow Web Server are the same as for DM Web Server. For the Internet Imaging Document Server (IIDS) on the DM Web Server, we recommend a dedicated partition of 10 GB for the image cache.

4.2 DM User Workstations

<i>Processor</i>	Pentium III 600 or better (recommended) Pentium III 500 (minimum)
<i>Memory</i>	512 MB or greater (recommended)
<i>Operating System</i>	Microsoft Windows 7 – 32 bit version Microsoft Windows XP (SP2, SP3) Microsoft Vista (SP1, SP2) Citrix Presentation Server 4.5 VMWare ESX Server
<i>Web Browser</i>	Microsoft Internet Explorer 6.0, 7.0 and 8.0

NOTES:

- **If DM Imaging is installed on user workstations, we recommend at least 1GB of RAM and 500 MB of free disk space if users are viewing large images.**
- **DM Extension for AutoCAD requires Autodesk AutoCAD 2007 or 2008. We recommend a 1024 x 768 VGA video display. Minimum of 800 x 600.**
- **The system requirements for DM Workflow Extensions and DM Extensions for AutoCAD are the same as for DM client workstations.**

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4.3 Supported Applications

4.3.1 Integrated Applications

The following table lists the applications supported in DM 5.2.1 CU5:

<i>Adobe Acrobat</i>	8.0 & 9.0
<i>AutoCAD</i>	2007 and 2008
<i>Corel Presentations</i>	12.0 and X3
<i>Corel Quattro Pro</i>	12.0 and X3
<i>Corel WordPerfect</i>	12.0 and X3
<i>Lotus 1-2-3</i>	9.7 and Millennium Edition 9.8
<i>Lotus Word Pro</i>	9.7 and Millennium Edition 9.8
<i>Microsoft Word</i>	2003 and 2007
<i>Microsoft Excel</i>	2003 and 2007
<i>Microsoft Visio</i>	2003 and 2007
<i>Microsoft PowerPoint</i>	2003 and 2007
<i>Microsoft Project</i>	2003 and 2007
<i>Workshare DeltaView</i>	3 (3.8680.0190) and 4.5 SR1 point release 2 (4.5.8680.116)

4.3.2 Email Applications

The following e-mail applications are supported in DM 5.2.1 CU5:

<i>Novell GroupWise</i>	7.0 and 8.0
<i>Lotus Notes</i>	7.0.4, 8.5.1
<i>Microsoft Outlook</i>	2003 and 2007

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5 Installation and Upgrade Notes

5.1 Installation Notes

Before installing DM 5.2.1 CU5, review the Configuration Notes and the Fixed Issues sections for information that may be applicable to your DM implementation.

When you download the DM 5.2.1 CU5 release, it is extracted by default to C:\Program Files\Hummingbird\Enterprise 2004 5.2.105\Image 51. You can change the installation path, if you want. When the download is finished, the Hummingbird Service Release Browser launches. You can download Release 5.2.1 CU5 for each server that you update, or you can download the service release set to a shared network location and update your servers from there.

The 5.2.1 updates to the DM API are installed with the DM Server and DM Extensions updates for Release 5.2.1 CU5.

5.1.1 Database Changes

If you are upgrading from DM 5.2.1 CU4 you are not required to run the Library Generator (**tblcomp.exe**) program.

If you are upgrading from DM 5.2.1 CU3 or prior, or a previous version of DM 5.1.0.5, after you install DM 5.2.1 CU5, **you must run** Library Generator (**tblcomp.exe**) in order for new and changed tables and columns to be updated.

For a complete list of these tables and columns introduced in DM 5.2.x, consult the [DM and RM Documentation Updates](#).

5.1.2 .NET Framework 2.0

The .NET Framework 2.0 is a prerequisite for all products. To install, please download the Framework from the [Microsoft Download Center](#). You must install .NET Framework 2.0 on both the client and server machines.

If .NET 2.0 is not installed on the client workstation, the install may appear to hang after the dialog is displayed informing you that .NET 2.0 must be installed. To correct the issue, ensure that .NET 2.0 is installed prior to installing the DM Extensions client.

5.1.3 Support for Microsoft Office XP

Although Microsoft Office XP is not listed as a supported application for DM 5.2.1 CU5, we have performed minimal testing with Microsoft Office XP and determined that integration is possible.

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Open Text encourages customers to upgrade to Microsoft Office 2003 or Microsoft Office 2007 before deploying DM 5.2.1 CU5; however, if that is not possible, we will continue to accept support cases from customers using DM 5.2.1 CU5 with Microsoft Office XP.

5.1.4 Support for Microsoft Office 2007*

For specific information regarding the support and application integration matrix for Microsoft Office 2007, please consult Chapter 6 of the [DM 5.2.1 Release Notes](#).

***Microsoft Office 2007 SP2 is supported as of eDOCS DM 5.2.1.**

5.1.5 Update Deployment Packages Created Prior to DM 5.2.1 CU5

Deployment Packages that were created prior to DM 5.2.1 CU5 need to be updated. Edit your existing deployment packages, re-enter your administration credentials, reselect the correct components, and execute a **Save** before using the package. After you install DM 5.2.1 CU5, you should run the Deployment Package Wizard and resave all deployment packages that use the “Run as Administrator” option.

To re-save a deployment package:

1. Click Stat>Programs>Hummingbird>DM Extensions Server Setup>Deployment Package Wizard.
2. Select a deployment package that has the Run as Administrator option enabled, which is displayed in the Details box.
3. Click Edit to edit the deployment package.
4. In the Location Information dialog box, click Next.
5. In the User Information dialog box, type the administrator credentials to be used by the deployment package, and then click Next.
6. Continue clicking Next on all subsequent dialog boxes, and then click Save.
7. Repeat the above steps for all deployment packages using the Run as Administrator option, and then exit the wizard.

5.1.6 User Account Control (UAC) Setting in Windows Vista and Windows 7

The User Account Control (UAC) setting in Windows Vista is enabled by default and for Windows 7 is set to the default level. The following issues occur with this setting:

- Installing DM Extensions from DM Webtop.
- Starting DM Extensions after starting the Client Deployment Utility (CDU).

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- Adding a DM server when you log on to DM Extensions.

When UAC is turned off or disabled these above issues do not occur.

For more information about the UAC setting, please consult the Microsoft support site at <http://support.microsoft.com>.

5.1.7 Visual C++ 2005 SP1

The Visual C++ 2005 SP1 redistributables are a prerequisite to DM Extensions, DM Server, and all server-side products that require the DM API. For server-side patch installations, the DM administrator should be prompted to install this redistributable.

For DM Extensions, the user will be prompted only for interactive installations. This redistributable will not be removed when DM is uninstalled from the machine.

5.2 DM Server

5.2.1 Pre-Installation

DM Server 5.1.0.5 or greater must be installed before Release 5.2.1 CU5 can be applied. The Release 5.2.1 CU5 installation program validates the licensing to determine which products are installed and installs files that need updating.

Before installing the DM Server files on a server that is indexing with SearchServer™, stop your SearchServer indexes using DM Server Manager. When the installation is finished, restart the indexes.

If the DM Web Server is installed on the DM Server machine, it must be stopped to release connectivity with the DM API. Shut down the IIS Admin Service in Control Panel>Services. When the installation is finished, restart the IIS Admin Service and all appropriate Web services.

How to Install

1. To install Release 5.2.1 CU5 on the DM Server being updated, from the service release browser, click **Install Products>DM Server**.
2. The DM Server installation shuts down the DM Server service, installs the Release 5.2.1 CU5 files, and restarts DM Server. At the end of the DM Server installation you may receive a **Reboot Required** notice. Reboot the DM Server to complete the installation. If you cannot connect to user workstations after the Release is installed, verify that the **Server State** in DM Server Manager is **Started**.

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5.2.2 Post Installation

If you are upgrading from DM 5.2.1 CU4 you are not required to run the Library Generator (**tblcomp.exe**) program.

If you are upgrading from DM 5.2.1 CU3 or prior, or a previous version of DM 5.1.0.5, after you install DM 5.2.1 CU5, **you must run** Library Generator (**tblcomp.exe**) in order for new and changed tables and columns to be updated.

For a complete list of these tables and columns introduced in DM 5.2.x, consult the [DM and RM Documentation Updates](#).

5.3 DM Web Server

5.3.1 Pre-installation

DM Web Server 5.1.0.5 or greater must be installed before Release 5.2.1 CU5 can be applied. The Release 5.2.1 CU5 installation program validates the licensing to determine which products are installed and installs files that need updating. If you have multiple Web Server instances installed for multilingual support, the 5.2.1 CU5 installation program updates all instances.

How to Install

On the DM Web Server being updated, from the service release browser, click **Install Products>DM Web Server**.

5.3.2 Post Installation

To update DM Extensions, run DM Extensions Server Setup after updating DM Web Server.

If you have custom directories for your users or groups, copy the appropriate files from the **Cyberdocs\Backup** directory to your custom directories after the release has been installed.

5.4 DM Workflow Server

5.4.1 Pre-installation

DM Workflow 5.1.0.5 or greater must be installed before the service release can be applied.

How to Install

1. On the server being updated, from the service release browser, click **Install Products>DM Workflow Server**.

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2. Apply DM Workflow Server updates.
3. Update the DM Workflow clients.

5.5 DM Extensions Server Setup

5.5.1 Installation

DM Extensions Server Setup 5.1.0.5 or greater must be installed before Release 5.2.1 CU5 can be applied.

How to Install

1. On the server being updated, from the service release browser, click **Install Products>DM Extensions Server Setup**.
2. After the service release for the DM Extensions Server Setup has been installed, users can log on to DM Webtop to upgrade DM Extensions on their machines.

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6 Configuration Notes

6.1 Library Regeneration

If you are upgrading from DM 5.2.1 CU4 you are not required to run the Library Generator (**tblcomp.exe**) program.

If you are upgrading from DM 5.2.1 CU3 or prior or a previous version of DM 5.1.0.5, after you install DM 5.2.1 CU5, **you must run** Library Generator (**tblcomp.exe**) in order for new and changed tables and columns to be updated.

For a complete list of these tables and columns introduced in DM 5.2.x, consult the [DM and RM Documentation Updates](#).

6.2 Database Schema Changes

INH_LUP_SEC_FROM Column Value Changes

As of DM 5.2.1 CU5, the INH_LUP_SEC_FROM column was changed to include values that reflect the type of Dynamic View security set on a document.

Value Definition

-1 The security that this document would have inherited from a Dynamic View node has been overridden.

0 (or null) The document does not have any Dynamic View security inheritance because there is no Dynamic View security set.

Any value greater than 0

The security for this document is being inherited from a Dynamic View node.

The value of this column is actually the SYSTEM_ID value of the Dynamic View node that the security is inherited from (for example, the SYSTEM_ID of a Matter).

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7 Fixed Issues

A list of Fixed Issues contained in this release can be found [here](#).

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8 Known Issues

8.1 GroupWise 8 prompt to save (DM-20043)

When you save a GroupWise 8 email (RTF) to DM, then open it in MS Word and exit without edits it asks you if you want to save the changes. **The workaround is just to say no.** GroupWise 8 handles messages differently than GroupWise 7 in that it includes an attachment of the message content along with the message. When you save a GroupWise message natively it gives you the option as to what components of the message you want saved.

To reproduce:

1. Launch GroupWise 8.0 - integrated with DM Email integration
2. Save an email to DM - RTF format, App_Id = MS Word
3. Save attachments - don't check "Save attachments separately."
4. Open email from RED list in to MS Word 2003
5. The saved email opens with a text.htm embedded in the doc - this is a copy of the content of the message
6. File > Exit

Result: you get a MS Word dialog asking you if you want to save the document. This will happen every time you open the document now whether or not you choose to save it on exit.

Workaround: each time you can just click passed this by either selecting yes to save or no. It doesn't affect the document OR you can select "Don't Save Attachments" or Save "Attachments Separately" at the Save to Hummingbird dialog. You won't get the question if the text.htm isn't saved with the document.

Note: this happens with or without document attachments to the email. If the user has attachments and they want them saved embedded in the parent document they will get the text.htm file as well and it will cause the save message. If you select save attachments separately you can exclude the text.htm. You can only exclude the text.htm if you check "Save attachments separately."

8.2 Windows 7 Logoff – Login (DM-20135)

On Windows 7, if you Logoff and log back in from within Windows Explorer, the contents of the Right Hand Pane will disappear.

- 1) Login to CDU.
- 2) Go to Hummingbird DM Client Deployment Utility -> Plug-ins -> Document Management Plug-in -> Logon -> Enable Log Off.
- 3) Login to Windows Explorer DM Extensions then select RED list
- 4) Select File -> Log Off
- 5) Check whether DM icon will disappear in your Windows System Tray.
- 6) Click on Application node and login to Windows Explorer DM Extensions.

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Resolution: The recommendation is not to enable the Logoff feature for Windows 7 users. The issue will be further investigated as part of the eDOCS DM 5.3 release.

8.3 Error Value cannot be Null (DM-20491)

Error "Value cannot be null. Parameter name: value" when trying to use native functions. This occurs when the user is not logged on to eDOCS DM and has not launched DM at least once on a machine that has not had DM previously installed.

Resolution: After install installing eDOCS DM, it must be launched once before accessing and using Office applications natively without being logged on to eDOCS.

8.4 User may get an error message when doing a SaveAs from Attache (DM-20033)

During the DM 5.2.1 CU5 testing, an error message occurs intermittently when doing the following steps with MS Office 2007:

1. Launch DM Extensions
2. Go to offline mode
3. From the Application node, launch either MS Excel 2007 or MS PowerPoint 2007
4. Make some edits and click DM>>Save As
5. Fill the name in the Attache Profile dialog and click on OK
6. An error message "Retrieving COM Class.....Failed due to the following error: 8001010d.

Resolution: By selecting OK on the dialog box the file will be saved. Additionally the DM Ribbon menu has to be active at the time of doing the SaveAs for this intermittent error to occur. If you are experiencing this problem, contact Open Text Customer Support to see if a HotFix is available.

8.5 Subscribing at client level gives error (DM-20351)

In the Subscription dialog, subscribing at a client level gives an error if user has unsubscribed clients from an earlier session:

1. Launch DM Extensions and login to DM
2. Expand DM tree view and select any dynamic view node, client or matter.
3. Right click and select 'Subscriptions' options
4. In the Subscriptions dialog, expand "My Client\Matters" node
5. Select any client, right click and select 'Unsubscribe'.
6. Close the Subscription dialog and logoff from the DM Extensions.

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7. Login back into the DM Extensions.
8. Select any dynamic view node, client or matter. Right click >> Subscriptions
9. Right click on "My Client\Matters" node and select 'Subscribe to >> Client'

An error message "Server name: Programming error. You have supplied invalid parameters for an API call " is displayed.

Resolution: The issues is resolved by doing a cache refresh. From explorer select the Options pull down and select Refresh Cache.

8.6 Automatic Refresh for Dynamic Views (DM-19928)

When a new subscription is added the user will normally have to perform a manual refresh using Microsoft Outlook's Refresh Contents option.

1. Expand the Dynamic Views tree.
2. Add a new subscription.
3. The new subscription is not added to the Subscription view.
4. The user must highlight the parent node and select View>Refresh Contents to update the view.

Resolution: The following registry key controls whether the subscriptions are refreshed automatically or not for Dynamic Views which have a parent node. For Dynamic Views that are setup without a Parent Node please review item 8.8 in this known issues section.

To Enable Automatic Refresh:

Set following registry key in order to enable (turn on):

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Hummingbird\PowerDOCS\Outlook  
Client\Settings]  
"RefreshChild"=dword:00000001
```

To Disable Automatic Refresh:

Set following registry key in order to disable (turn off):

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Hummingbird\PowerDOCS\Outlook  
Client\Settings]  
"RefreshChild"=dword:00000000
```

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8.7 Automatic Refresh for Dynamic Views without Parent node (DM-20699)

The Automatic Refresh registry settings from issue DM-19928 (Described above) do not work when the Dynamic View is created without the Parent Node being included in the Dynamic view.

The following example is an example of Subscribing to a Dynamic View based on a child node where the issue occurs.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Hummingbird\PowerDOCS\Outlook  
Client\Settings]  
"RefreshChild"=dword:00000001
```

1. Right click the Subscribed Clients & Matters node, then select "Subscriptions" from the context menu.
2. Right click the tree list view in the subscriptions window, select "Subscribe to" from the context menu, and then select "matter".
3. Then in the matter window, select any matter under any client having multiple matters
4. Newly added matter appears correctly under respective client in Subscription window
5. Close Subscription window.

Actual result:- The Outlook folder view is NOT updated with the new subscription.

Resolution: If you are experiencing this problem, contact Open Text Customer Support to see if a HotFix is available.

8.8 Dynamic View Level Searches do not retain their custom columns in MS Outlook (DM-20721)

Dynamic View Level Searches do not retain their custom columns in MS Outlook, but they do in Windows Explorer.

The Windows Explorer columns are controlled by the registry keys in HKCU\Software\Hummingbird\PowerDOCS\Core\Plugins\Fusion\Settings\DetailColumns and the MS Outlook columns are controlled by DMViews.dat ([Reference item 2.1.7 in this document](#)).

For this to work in Explorer, "Use the same columns for all quick searches" needs to be enabled in the Client Deployment Utility (CDU).

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Resolution: If you are experiencing this problem with MS Outlook, contact Open Text Customer Support to see if a HotFix is available.

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9 Contact Information

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