

OPEN TEXT eDOCS DM

VERSION 6.0.5

RELEASE NOTES

09/30/08

Open Text eDOCS DM
Version 6.0.5
Release Notes

Rev.: 2008-09-30

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Chapter 1

Introduction

The following release notes state known problems and last minute changes to Open Text eDOCS DM Version 6.0.5 Preview. 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.

Check the [Open Text Knowledge Center](https://knowledge.opentext.com/) at (<https://knowledge.opentext.com/>) for any patches or documentation updates that may have been posted after the initial release of this version of Open Text eDOCS DM.

1.1 Contact Information

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Chapter 2

About Open Text eDOCS DM 6.0.5

2.1 General Information

The DM 6.0.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 6.0.1, 6.0.2, 6.0.3, and 6.0.4, see the release notes for those releases:

[DM and RM 6.0.1 Release Notes](#)

[DM and RM 6.0.2 Release Notes](#)

[DM and RM 6.0.3 Release Notes](#)

[DM and RM 6.0.4 Release Notes](#)

[DM and RM 6.0.4 CU1 Release Notes](#)

[DM and RM 6.0.4 CU2 Release Notes](#)

[DM and RM 6.0.4 CU3 Release Notes](#)

[DM and RM 6.0.4 CU4 Release Notes](#)

[DM and RM 6.0.4 CU5 Release Notes](#)

[DM and RM 6.0.5 CU6 Release Notes](#)

2.2 Documentation

The documentation and help files in DM 6.0.5 are those delivered with DM 6.0.1. 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 6.0.5 Software* document contains specific information related to this 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 6.x Documentation Updates* document contains new and updated documentation since the original release of DM 6.0.1, including information as a result of service releases and maintenance releases. This document also contains clarifications to existing documentation.

Windows Help (WinHelp) Not Included in Windows Vista

The Help files delivered with DM 6.0.5 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 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 6.0.5. You must consult the *Open Text - Using eDOCS DM 6.0.5 Software* and *DM/RM 6.x Documentation Updates* documents for all new information pertaining to this release.

2.3 New Features

- DM-14425: Support for Microsoft Vista operating systems
- DM-11425: Support for Microsoft Office 2007 COM integration
- DM-10286: Support for Lotus Notes 8
- DM-10581: Support for Adobe Acrobat Reader 8

-
- DM-6294: Support for Internet Explorer 7
 - DM-6582: Updated Content Drive
 - DM-581: Rename the "new document template" Action in the DM Webtop to "New Document from Template"
 - DM-12556: Ability to Limit Search Results in the DM Webtop per user
 - DM-12596: Ability to use a personalized home page within Lotus Notes
 - DM-14178: Ability to allow both mixed and Windows authentication to the SQL Server via a pcdocs.ini setting
 - DM-11760: Ability to Filter Event Notifications from Enterprise Workflow on the DM Server
 - DM-11070: Increase the limit of imaging documents that can be opened at one time
 - DM-10945: Display the message "The last page of a document cannot be deleted" when attempting to remove the last page of an imaging multi-page document.
 - DM-10112: Ability to prevent the overwriting of log files
 - DM-10023: Ability to save the full email address on the profile form
 - DM-9966: Ability to hide the default Quick Searches
 - DM-9964: Allow the user operating system's settings to control the font size in Explorer and Outlook Extensions
 - DM-9579: Support for EMC Centera Read-only Server
 - DM-9063: Ability to Suppress the "Press OK to retrieve a read-only copy of the document" Message
 - DM-8932: Removal of the NFS path in the Microsoft Office status bar

-
- DM-8556: Ability to insert objects into Word documents when disable native dialogs is enabled
 - DM-8385: Indicate if an incorrect entry is made into a profile form in DM Webtop
 - DM-8180: Ability to resize the Access Control List (ACL)
 - DM-7959: Allow additional read-only copies of a document to be opened when a read-only copy is already open
 - DM-6002: Ability to control if the status of “Managed/Unmanaged” appears in the Microsoft Excel toolbar



Chapter 3

Supported Environments

The following tables list the supported environments in DM 6.0.5.

3.1 Server Machines

3.1.1 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 Oracle 10g Release 2 and Oracle 11

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.

3.1.2 Document Server

<i>Operating System</i>	Novell Netware 6.5 Microsoft Windows 2003 Server Microsoft Windows 2000 Server EMC Centera
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3.1.3 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 GM minimum)
<i>Operating System</i>	Microsoft Windows 2003 Server Microsoft Windows 2000 Server
<i>Web Server</i>	Internet Information Server (IIS) 5.0 or 6.0
<i>Client</i>	Internet Explorer 6.0 and 7.0

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.

3.2 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 XP (SP2, SP3) Microsoft Vista (SP1) Citrix Presentation Server 4.5 VMWare ESX Server
<i>Web Browser</i>	Microsoft Internet Explorer 6.0 and 7.0

NOTES:

- If DM Imaging is installed on user workstations, we recommend at least 128 MB 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.

3.3 Supported Applications

3.3.1 Integrated Applications

The following table lists the applications supported in DM 6.0.5:

<i>Adobe Acrobat</i>	7.0 and 8.0
<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)

3.3.2 E-mail Applications

The following e-mail applications are supported in DM 6.0.5:

<i>Novell GroupWise</i>	6.5 and 7.0
<i>Lotus Notes</i>	7.x and 8.0
<i>Microsoft Outlook</i>	2003 and 2007

Chapter 4

Installation Notes

Before installing DM 6.0.5, review the Configuration Notes and the Fixed Issues sections for information that may be applicable to your DM implementation.

When you download the DM 6.0.5 release, it is extracted by default to C:\Program Files\Hummingbird\Enterprise 2005 6.0.5\Image 200 You can change the installation path, if you want. When the download is finished, the Hummingbird Service Release Browser launches. You can download Release 6.0.5 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. If you are running from a network location, double-click \Enterprise 2005 6.0.5\ setup.exe to launch the service release browser.

The 6.0.5 updates to the DM API are installed with the DM Server and DM Extensions updates for Release 6.0.5.



When running AutoUpdate with DM 6.0.5, the Add/Modify/Repair dialog will be presented to the user. A fix was placed in 6.0.5 which will take effect in DM 6.0.5 CU1.

.NET Framework 2.0

The .NET Framework 2.0 is a prerequisite for all products and is included with the DM 6.0.5 release. 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.

Oracle Hybrid Searching

Oracle is supported in hybrid searching. The hybrid search enhancement changes the way in which the INDEX table uses metadata when performing a hybrid search, which is a search that contains both profile and content search criteria.

For complete instructions on using hybrid searching, consult the "Improved Performance for Hybrid Searches" section in the *DM/RM 6.x Documentation Updates* document.

Support for Microsoft Office XP

Although Microsoft Office XP is not listed as a supported application for DM 6.0.5, we have performed minimal testing with Microsoft Office XP and determined that integration is possible.

Open Text encourages customers to upgrade to Microsoft Office 2003 or Microsoft Office 2007 before deploying DM 6.0.5; however, if that is not possible, we will continue to support customers using DM 6.0.5 with Microsoft Office XP.

Consult the Open Text - *Using eDOCS DM 6.0.5 Software* document for the "Supported Applications and Platforms in DM 6.0.5" chapter.

Support for Microsoft SQL Server 2005

Support for Microsoft SQL Server 2005 is provided in native mode.

Update Deployment Packages Created Prior to DM 605

Deployment Packages that were created prior to DM 6.0.5 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 6.0.5, 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:

Click **Stat>Programs>Hummingbird>DM Extensions Server Setup>Deployment Package Wizard**.

Select a deployment package that has the **Run as Administrator** option enabled, which is displayed in the **Details** box.

Click **Edit** to edit the deployment package.

In the Location Information dialog box, click **Next**.

In the User Information dialog box, type the administrator credentials to be used by the deployment package, and then click **Next**.

Continue clicking **Next** on all subsequent dialog boxes, and then click **Save**.

Repeat the above steps for all deployment packages using the **Run as Administrator** option, and then exit the wizard.

Upgrading or Changing Integration Methods

When you upgrade or change your integration method (ODMA, COM, Passive, Active, or Interceptor) for an application, some menu items might be unavailable, appear twice, or do not work as expected. This is working as designed to prevent other potential integration issues, such as performance issues, conflicts with third-party macros, and saving and read-only issues with the **normal.dot** file in Microsoft Word. You can resolve this issue by resetting the toolbars.

To resolve the menu issue:

Start the application that has unavailable, duplicate, or non-functioning menu options.

Select **Tools>Customize**.

In the **Toolbars** tab, select **Standard**, and then click **Reset**.

Select **Menu Bar**, and then click **Reset**.

In Microsoft Word, click **OK** when you are prompted to reset changes in the **normal.dot** file.

NOTE: Customizations to the toolbar will be lost by resetting the toolbar.

User Account Control (UAC) Setting in Windows Vista

The User Account Control (UAC) setting in Windows Vista operating systems is enabled by default. The following issues occur with this setting enabled:

- Installing DM Extensions from DM Webtop.
- Starting DM Extensions after starting the Client Deployment Utility (CDU).
- Adding a DM server when you log on to DM Extensions.

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

Windows Vista Firewall

When using the Windows Vista Firewall, the user may be presented with a dialog to unblock DM-related items the first time they are run such as papihost.exe and any Office Active COM integrated applications. DM-14359.

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.

4.1 DM Server

4.1.1 Pre-installation

DM Server 6.0.1 must be installed before Release 6.0.5 can be applied. The Release 6.0.5 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. See Section 5.4 for additional information about creating and deploying indexes with DM 6.0.5.

If 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

To install Release 6.0.5 on the DM Server being updated, from the service release browser, click **Install Products>DM Server**.

The DM Server installation shuts down the DM Server service, installs the Release 6.0.5 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**.

4.1.2 After Installation

DM 6.0.5 requires that you update your database. Be sure to run Library Generator against your database after the installation of DM 6.0.5.

To modify or repair your DM Server installation at a later time:

1. Uninstall DM Server from **Control Panel>Add or Remove Programs**.
2. Using the DM 6.0.1 installation media, perform a **Modify or Repair**.
3. Reinstall DM Server 6.0.5.

4.2 DM Web Server

4.2.1 Pre-installation

DM Web Server 6.0.1 must be installed before Release 6.0.5 can be applied. The Release 6.0.5 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 6.0.5 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**.

4.2.2 After 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.

To modify or repair your DM Web Server 6.0.5 installation at a later time:

1. Uninstall DM Web Server 6.0.5 from Control Panel>Add or Remove Programs.
2. Using the DM 6.0.1 installation media, perform a Modify or Repair.
3. Reinstall DM Web Server 6.0.5.

4.3 DM Workflow Server

4.3.1 Pre-installation

DM Workflow 6.0.1 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**.
2. Apply DM Workflow Server updates.
3. Update the DM Workflow clients.

4.3.2 After Installation

If you need to modify or repair your DM Workflow Server installation at a later time:

1. Uninstall the DM Workflow Server from **Control Panel>Add or Remove Programs**.
2. Using the DM 6.0.1 installation media, perform a Modify or Repair.
3. Reinstall DM Workflow 6.0.5.

4.4 DM Extensions Server Setup

4.4.1 Pre-installation

DM Extensions Server Setup 6.0.1 must be installed before Release 6.0.5 can be applied.

How to Install

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

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.

Chapter 5

Configuration Notes

5.1 Library Regeneration

All libraries should be updated with DM 6.0.5 using the updated Library Generation utility located in the `\Tools\DM Server` directory. Changes that Library Generation will make are:

Introduced in Version	Description of Library Generation Change
DM 6.0.5	See the Error! Reference source not found. section for changes.
DM 6.0.4	Changes CALC_SECURITY stored procedure that is used to obtain security during a search against multiple documents. Impacts any search that also gets security. Required for all libraries.
DM 6.0.4	Provides support for Library Generation with Oracle 10g.
DM 6.0.2	Changes filter for lookup _DMFOLDERS to ITEM_TYPE='F'. Valid for customers using the Classified module.
DM 6.0.2	Corrects a script file error when creating triggers for the Classification tables. Valid for new Government libraries on Oracle.

If you are using the Classified Security Module, copy the **INDUSTRY.INI** file to the **Program Files\Hummingbird\DM Server\Program** directory from the **Program**

Files\Hummingbird\Enterprise 2005 6.0.5\Image 200\Tools\DM Server\Enu\program\csm directory before running Library Generation.

5.2 Database Schema Changes

ACTIVITYLOG Table Addition

As of DM 6.0.5, the following column was added to the ACTIVITYLOG table:

CTIME_LP

This column contains the low order 32 bits of a FILETIME value, and is used by the Content Drive implementation to ensure library-level cached information is current.

Version Introduced: 6.0.5

Data Type Integer

Constraints Allow Null

CTIME_HP

This column contains the high order 32 bits of a FILETIME value, and is used by the Content Drive implementation to ensure library-level cached information is current.

Version Introduced: 6.0.5

Data Type Integer

Constraints Allow Null

COMPONENTS Table Addition

As of DM 6.0.5, the following column was added to the COMPONENTS table:

REVISION

This column contains the current revision number of the component file. The value of this column is updated when a new file revision is committed. File revisions are committed as part of the document unlocking process, which signals the end of a file edit session.

Version Introduced: 6.0.5

Data Type Integer

Constraints NOT Null

DOCSERVERS Table Change

As of DM 6.0.5, the length was changed from 64 to 200 in the LOCATION column. Following is the new Data Type NVarChar value.

LOCATION

Data Type NVarChar(200)

NFS_FILE_LIST Table

The NFS_FILE_LIST table was introduced in version 6.0.5 of the DM database. This table is used to manage file revisions and map users to specific file revisions. The NFS_FILE_LIST table is managed completely by the DM/NFS infrastructure. Table rows are added and deleted as needed. In an idle system, this table should optimally be empty.

CLIENT_ID

A numeric value supplied by the NFS server, which identifies the physical client to which the file mapping applies. This value is used to distinguish the possibility of the same DM user accessing a specific file from different physical machines.

Version Introduced: 6.0.5

Data Type Integer

Version Introduced:

DELEGATION_FLAG

The status of the NFS v4 delegation for the physical file to which the file mapping applies.

Version Introduced: 6.0.5

Data Type Integer

Version Introduced:

DOCNUMBER

A link to the PROFILE table to identify the document number of the item.

Version Introduced: 6.0.5

Data Type Integer

Version Introduced:

PATH

The name of the physical file to which the file mapping applies. This is equivalent to the COMPONENTS.PATH column; however, it might have a different value, depending on the current revision level of the document/version.

Version Introduced: 6.0.5

Data Type NVarChar (128)

Version Introduced:

REVISION

The incremental file revision associated with the file mapping. The actual file revision of a document or version is maintained in the COMPONENTS table.

Version Introduced: 6.0.5

Data Type Integer

Version Introduced:

USER_ID

The numeric ID (PEOPLE.SYSTEM_ID) for the user to which the file mapping applies.

Version Introduced: 6.0.5

Data Type Integer

Version Introduced:

VERSION_ID

A key field used to uniquely identify each version record.

Version Introduced: 6.0.5

Data Type Integer

PROFILE Table Additions

CTIME_LP

Contains the low order 32 bits of a FILETIME value. This column is used by the Content Drive implementation to ensure document-level cached information is current.

Version Introduced: 6.0.5

Data Type Integer

Constraints Allow Null

CTIME_HP

Contains the high order 32 bits of a FILETIME value. This column is used by the Content Drive implementation to ensure document-level cached information is current.

Data Type Integer

Constraints Allow Null

VERSIONS Table Additions

CACHE_STATUS

This column is used by the Content Cache implementation to store the current status of lazy write upload operations. This column was added to eliminate version level status value collisions with RM functionality.

Data Type Integer

Constraints Allow Null

Version Introduced: 6.0.5

Values

0 No Activity

22 Cache upload in progress.

23 Cache upload failed.

CTIME_LP

This column contains the low order 32 bits of a FILETIME value. This column is used by the Content Drive implementation to ensure version-level cached information is current.

Data Type Integer

Constraints Allow Null

Version Introduced: 6.0.5

CTIME_HP

This column contains the high order 32 bits of a FILETIME value. This column is used by the Content Drive implementation to ensure version-level cached information is current.

Data Type Integer

Constraints Allow Null

Version Introduced: 6.0.5

5.3 Oracle

To create an Oracle ODBC connection, you must first establish an Oracle Local Net Service Name Configuration for the Oracle Server machine. This requires installation of the Oracle client and ODBC driver on the DM Server machine.

1. To install the client and ODBC driver, perform an Administration installation of the Oracle Client for 10gR2 or 11g.
2. Use one of the following ODBC drivers installed with the client software:
 - Oracle 10gR2: Driver 10.0.2.0.1.0 patched to 10.0.2.0.3.0 with ODBC patch #5699495
 - Oracle 11g: Driver 11.1.0.6.0 or later

5.4 Importing DM e-Clips into Enterprise Webtop

Perform the following steps to import DM e-Clips into Enterprise Webtop for DM 6.0.5:

1. Log on to Enterprise Webtop as an administrator.
2. From **Administration**, select **Import**.
3. Browse for the file **DM6eClips.zip** (**..Program Files\Hummingbird\....\Tools\DM Web Server\eClips**).
4. Click **OK**.

5.5 DM Indexer Considerations

This release contains SearchServer 6.1.0.167. When upgrading from any earlier DM 6.x release, you must create new indexes of your DM Libraries. We recommend that you configure one indexing server to build your new indexes before deploying DM 6.0.5 to client workstations. Alternatively, you can select previous releases of SearchServer indexes for client searching while you build the indexes; however, these indexes must be static and cannot be updated by SearchServer 6.1.0.167 during the transition. You can also create indexes before rolling out the upgrade to clients.



Lotus Notes emails (DXL) are not being indexed. An error will appear in the indexer logfile similar to:

Tue Sep 23 16:41:53 2008: Document 71: [809GD] [Hummingbird][SearchServer]Text reader error : [hummingbird://docsfusion/profile/DM60503199/DM60503199/71/%VERSION_TO_INDEX](#): Line 2 Col 57 'An exception occurred! Type:RuntimeException, Message:Could not open DTD file 'xmlschemas/domino_7_0_3.dtd" (DM-14906)




In DM Server Manager on the Search Servers tab the "Size" column is calculated incorrectly in DM 6.0.5 because of the changes made in the new version of Search Server. (DM-14797)



Chapter 6

Microsoft Office 2003/2007 Application Integration Matrix

The following chart should be used as a guide for expected behavior with Microsoft Office 2007 and Microsoft Office 2003 documents. The chart shows the behaviors that are specific to the type of document, which is listed in the **Type of Document** column. Some behaviors are also based on how the individual DM libraries are configured. For libraries that are configured with Office 2007 file extensions, those behaviors are in the two columns under the **Office 2007 Library** column. For libraries that are configured with Office 2003 file extensions, those behaviors are in the two columns under the **Office 2003 Library** column. Further specification has been made for each library configuration depending on which client-side Office application is being used. The integration was designed so that DM Extensions would work independent of what file format is being saved into DM, thus avoiding the need to keep all documents in the same file format per library. Note that Microsoft requires the installation of their Office 2007 compatibility pack for Office 2003 clients to open, edit and save Office 2007 file formatted documents.

 **NOTE:** There is a known Microsoft issue with PowerPoint. The following information describes the issue and is from Microsoft's support site:

“A presentation is unexpectedly saved as a .ppt file when you save a PowerPoint 2007 presentation (.pptx) file programmatically

You run PowerPoint 2003 that has the Compatibility Pack for Microsoft Office 2007 File Formats installed, and you save the presentation by using the object model that uses `ActivePresentation.Save`. If you save a presentation as a .pptx file, the presentation is unexpectedly saved in the .ppt format. Additionally, the presentation is saved with both the .pptx and the .ppt file name extensions as in the following example:

file name .pptx.ppt”

To resolve this issue you must contact Microsoft to obtain the Post SP3 Patch as indicated by Microsoft's knowledge base article KB936058.

Type of Document	Office 2007 Library (Default extension set to .docx)		Office 2003 Library (Default extension set to .doc)		Design Explained
	2003 Client Saves As	2007 Client Saves As	2003 Client Saves As	2007 Client Saves As	
Saving a New Document to DM	2007 (.docx, .xlsx, .pptx)	2007 (.docx, .xlsx, .pptx)	2003 (.doc, .xls, .ppt)	2003 (.doc, .xls, .ppt)	See 6.1
Saving a New Document Natively	Defaults to application's default save type	Defaults to application's default save type	Defaults to application's default save type	Defaults to application's default save type	See 6.2
Saving a New Document to DM that Was Previously Saved in Office 2007 File Format Natively	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.3
Saving a New Document to DM that Was Previously Saved in Office 2003 File Format Natively	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.4
Saving an Existing Office 2007 DM Document Back to DM	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.5
Saving an Existing Office 2003 DM Document Back to DM	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.6
Saving an Existing Office 2007 DM Document Natively	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.7
Saving an Existing Office 2003 DM Document Natively	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.8
Saving an Existing Office 2007 Attachment from an E-mail Message	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.9

Type of Document	Office 2007 Library (Default extension set to .docx)		Office 2003 Library (Default extension set to .doc)		Design Explained
	2003 Client Saves As	2007 Client Saves As	2003 Client Saves As	2007 Client Saves As	
Saving an Existing Office 2003 Attachment from an E-mail Message	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.10
Inserting an Existing DM Office 2007 Document in an E-mail Message	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.11
Inserting an Existing DM Office 2003 Document in an E-mail Message	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.12
Exporting an Existing Office 2007 DM Document	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.13
Exporting an Existing Office 2003 DM Document	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.14
Saving a Natively-Saved Office 2007 Document to DM as a DM Version of an Office 2007 Document	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.15
Saving a New Office 2007 Document to DM as a DM Version of an Office 2003 Document	Not supported	Not supported	Not supported	Not supported	See 6.16
Saving a Natively-Saved Office 2003 Document to DM as a DM Version of an Office 2003 Document	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.17

Type of Document	Office 2007 Library (Default extension set to .docx)		Office 2003 Library (Default extension set to .doc)		Design Explained
	2003 Client Saves As	2007 Client Saves As	2003 Client Saves As	2007 Client Saves As	
Saving a New Office 2003 Document to DM as a DM Version of an Office 2007 Document	Not supported	Not supported	Not supported	Not supported	See 6.18
Copying an Existing DM Office 2003 Document to Attaché	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.19
Copying an Existing DM Office 2007 Document to Attaché	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.20
Importing an Office 2003 Document from Attaché	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.21
Importing an Office 2007 Document from Attaché	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.22
Exporting or E-mailing a DRF to an Office 2003 DM Document	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.23
Exporting or E-mailing a DRF to an Office 2007 DM Document	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.24
Importing Office 2007 document	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	2007(.docx, .xlsx, .pptx)	See 6.26
Importing Office 2003 Document	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	2003(.doc, .xls, .ppt)	See 6.26

6.1 Saving a New Document to DM

When a new document is saved to DM through the authoring application, such as Word or Excel, DM will examine the library settings and save the file accordingly. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**), when a user selects **New Document** inside of Microsoft Word, makes edits and then saves the changes, the document will save to DM as an Office 2007 document. The document is saved in this file format even when the client-side application is Office 2003 with the Microsoft compatibility pack.

6.2 Saving a New Document Natively

When a new document is saved natively through the authoring application, such as Word or Excel, DM will respect the default save type settings specific to that application. These save defaults are set in each individual client workstation per application. Access to this configuration can differ between applications. For example, this setting is located in Word 2003 in **Tools>Options>Save tab>Save Word File as**.

For example, when you create a new document, make edits and select to save the document locally instead of to DM, if you have set up your Office 2007 client application to default to Office 2003 file formats (such as **doc**), by default the document will be saved in an Office 2003 (**doc**) file format.

6.3 Saving a New Document to DM that Was Previously Saved in Office 2007 File Format Natively

A document, which has already been saved outside of DM natively, will be saved to DM in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc** and **.xls**) and you open a document from your desktop with Word 2003, if the document is in Office 2007 (**.docx**) file format, it will be saved to DM as an Office 2007 document (using the **.docx** file extension). DM will not convert the document based on your library settings; this is to help avoid issues where file formatting specific to Office 2007 might be lost.

6.4 Saving a New Document to DM that Was Previously Saved in Office 2003 File Format Natively

A document, which has already been saved outside of DM natively, will be saved to DM in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx** and **.xlsx**) and you open a document from your desktop with Word 2007, if the document is in Office 2003 (**.doc**) file format, it

will be saved to DM as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings.

6.5 Saving an Existing Office 2007 DM Document Back to DM

A document, which has already been saved to DM, will be saved back to DM in its original file format, including saving the document as a new version or subversion. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you open a document from DM with Word 2007, if the document is in Office 2007 (**.docx**) file format, it will be saved to DM as an Office 2007 document (using the **.docx** file extension). DM will not convert the document based on your library settings.



NOTE: When you select the **New Document** option when saving an existing DM document, the file extension remain the same as the existing document. For example, if you open a Word 2007 document (such as **text.docx**) and then save it as a new document to a library with the Office 2003 file format, the extension will remain the same (such as **newdoc.docx**). The file is saved based on the library setting.

6.6 Saving an Existing Office 2003 DM Document Back to DM

A document, which has already been saved to DM, will be saved back to DM in its original file format, including saving the document as a new version or subversion. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you open a document from DM with Word 2007, if the document is in Office 2003 (**.doc**) file format, it will be saved to DM as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings.



NOTE: When you select the **New Document** option when saving an existing DM document, the file extension remain the same as the existing document. For example, if you open a Word 2003 document (such as **text.doc**) and then save it as a new document to a library with the Office 2007 file format, the extension will remain the same (such as **newdoc.doc**). The file is saved based on the library setting.

6.7 Saving an Existing Office 2007 DM Document Natively

A document, which has already been saved to DM, will be saved natively (to your desktop, for example) in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you open a document from DM with Word 2007, if the document is in Office 2007 (**.doc**) file format, it will be saved natively as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings, nor will it default to your application's default save type settings.



NOTE: Due to a known issue with PowerPoint 2003, in order to save a PowerPoint 2007 formatted file in Office 2007 format, you will need to select the **.pptx** extension from the **Save as type** drop-down list.

6.8 Saving an Existing Office 2003 DM Document Natively

A document, which has already been saved to DM, will be saved natively (to your desktop, for example), in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you open a document from DM with Word 2007, if the document is in Office 2007 (**.doc**) file format, it will be saved natively as an Office 2007 document (using the **.doc** file extension). DM will not convert the document based on your library settings, nor will it default to your application's default save type settings.

6.9 Saving an Existing Office 2007 Attachment from an E-mail Message

A document, which is attached to an e-mail message, will be saved to DM in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you save an e-mail attachment to DM with Outlook 2007, if the attachment is in Office 2007 (**.docx**) file format, it will be saved to DM as an Office 2007 document (using the **.docx** file extension). Because conversions of documents are done only within the authoring applications, such as Microsoft Word or Excel 2007, documents saved as attachments from e-mail messages cannot be converted through Outlook.

6.10 Saving an Existing Office 2003 Attachment from an E-mail Message

A document, which is attached to an e-mail message, will be saved to DM in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you save an e-mail attachment to DM with Outlook 2007, if the attachment is in Office 2003 (**.doc**) file format, it will be saved to DM as an Office 2003 document (using the **.doc** file extension). Because conversions of documents are done only within the authoring applications, such as Microsoft Word or Excel 2007, documents saved as attachments from e-mail messages cannot be converted through Outlook.

6.11 Inserting an Existing DM Office 2007 Document in an E-mail Message

A document, which already exists in DM, will maintain its original file format when the document is inserted into an e-mail message. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you attach a document to an e-mail with Outlook 2007, if the attachment is in Office 2007 (**.docx**) file format, it will be inserted into the e-mail message as an Office 2007 document (using the **.docx** file extension). Because conversions of documents are done only within the authoring applications, such as Microsoft Word or Excel 2007, DM documents attached to e-mail messages cannot be converted through Outlook.

6.12 Inserting an Existing DM Office 2003 Document in an E-mail Message

A document, which already exists in DM, will maintain its original file format when the document is inserted into an e-mail message. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you attach a document to an e-mail message with Outlook 2003, if the attachment is in an Office 2003 (**.doc**) file format, it will be attached to the e-mail message as an Office 2003 document (using the **.doc** file extension). Because conversions of documents are done only within the authoring applications, such as Microsoft Word or Excel 2007, DM documents attached to e-mail messages cannot be converted through Outlook.

6.13 Exporting an Existing Office 2007 DM Document

A document, which has already been saved to DM, will be exported in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you drag and drop a document from DM to your

desktop, if the document is in Office 2007 (.docx) file format, it will be saved to your desktop as an Office 2007 document (using the .docx file extension). DM will not convert the document based on your library settings, nor will it default to your application's default save type settings.

6.14 Exporting an Existing Office 2003 DM Document

A document, which has already been saved to DM, will be exported in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as .docx) and you drag and drop a document from DM to your desktop, if the document is in Office 2003 (.doc) file format, it will be saved to your desktop as an Office 2003 document (using the .doc file extension). DM will not convert the document based on your library settings, nor will it default to your application's default save type settings.

6.15 Saving a Natively-Saved Office 2007 Document to DM as a DM Version of an Office 2007 Document

A document, which has already been saved outside of DM natively, will be saved to DM in its original file format, even when the user saves the document using the **Save As DM Version** option within the Office application. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as .doc) and you open a natively-saved document with Word 2003, if the document is in Office 2007 (.docx) file format, it will be saved to DM as an Office 2007 document (using the .docx file extension). DM will not convert the document based on your library settings, nor will it convert the document based on the existing DM document.

6.16 Saving a New Office 2007 Document to DM as a DM Version of an Office 2003 Document

The ability to save documents where individual versions have different file types is not supported in DM 6.0.5, nor is it supported in any previous version. All document versions saved or imported to DM must have the same file extensions and file formatting as the original document.

For example, if you create a Word 2007 document and select the **Save As DM Version** option and select a Word 2003 document, the new document is saved with the .doc file extension.

6.17 Saving a Natively-Saved Office 2003 Document to DM as a DM Version of an Office 2003 Document

A document, which has already been saved outside of DM natively, will be saved to DM in its original file format, even when the user saves the document using the **Save As DM Version** option

within the Office application. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you open a natively-saved document with Word 2007, if the document is in Office 2003 (**.doc**) file format, it will be saved to DM as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings, nor will it convert the document based on the existing DM document's file format.

6.18 Saving a New Office 2003 Document to DM as a DM Version of an Office 2007 Document

The ability to save documents where individual versions have different file types is not supported in DM 6.0.5, nor is it supported in any previous version. All document versions saved or imported to DM must have the same file extensions and file formatting as the original document.

For example, if you create a Word 2003 document and select the **Save As DM Version** option and select a Word 2007 document, the new document is saved with the **.docx** file extension.

6.19 Copying an Existing DM Office 2003 Document to Attaché

A document, which has already been saved to DM, will be copied to Attaché in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you drag and drop a document from DM to your Attaché folder, if the document is in Office 2003 (**.doc**) file format, it will be saved to Attaché as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings.

6.20 Copying an Existing DM Office 2007 Document to Attaché

A document, which has already been saved to DM, will be copied to Attaché in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you drag and drop a document from DM to your Attaché folder, if the document is in Office 2007 (**.docx**) file format, it will be saved to Attaché as an Office 2007 document (using the **.docx** file extension). DM will not convert the document based on your library settings.

6.21 Importing an Office 2003 Document from Attaché

A document, which has already been saved to your Attaché folder, will be copied to DM in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you import a document from Attaché to DM, if the document is in Office 2003 (**.doc**) file format, it will be saved to DM as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings.



NOTE: When you attempt to import a document from Attaché as a version of the existing document, the document is imported correctly; however, the document's file extension is changed to match the library settings. To avoid this issue, you should import documents as new documents. This information is available in DM-13963.

6.22 Importing an Office 2007 Document from Attaché

A document, which has already been saved to your Attaché folder, will be copied to DM in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you import a document from Attaché to DM, if the document is in Office 2007 (**.docx**) file format, it will be saved to DM as an Office 2007 document (using the **.docx** file extension). DM will not convert the document based on your library settings.



NOTE: When you attempt to import a document from Attaché as a version of the existing document, the document is imported correctly; however, the document's file extension is changed to match the library settings. To avoid this issue, you should import documents as new documents. This information is available in DM-13963.

6.23 Exporting or E-mailing a DRF to an Office 2003 DM Document

A document, which has already been saved to DM, will maintain its original file format when it is exported or e-mailed as a DRF. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you export or e-mail a DRF to an Office 2003 file formatted DM document, the document's DRF will appropriately reference the document so that it can be opened as an Office 2003 file formatted document. DM will not convert the document based on your library settings.

6.24 Exporting or E-mailing a DRF to an Office 2007 DM Document

A document, which has already been saved to DM, will maintain its original file format when it is exported or e-mailed as a DRF. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you export or e-mail a DRF to an Office 2007 file formatted DM document, the document's DRF will appropriately reference the document so that it can be opened as an Office 2007 file formatted document. DM will not convert the document based on your library settings.

6.25 Importing an Existing Office 2007 Document

A document, which has already been saved natively, will be exported in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2003 file formats (such as **.doc**) and you choose File → Import from DM Extensions, to if the document is in Office 2007 (**.docx**) file format, it will be saved into DM as an Office 2007 document (using the **.docx** file extension). DM will not convert the document based on your library settings, nor will it default to your application's default save type settings.

6.26 Importing an Existing Office 2003 Document

A document, which has already been saved natively, will be exported in its original file format. DM does not consider library settings or client application. For example, if your library is set up to use the Office 2007 file formats (such as **.docx**) and you choose File → Import from DM Extensions, to if the document is in Office 2007 (**.docx**) file format, it will be saved into DM as an Office 2003 document (using the **.doc** file extension). DM will not convert the document based on your library settings, nor will it default to your application's default save type settings.



Chapter 7

Known Issues

7.1 Outlook Issues

DM-14274: Viewing message using right click on the document name in "Save to Hummingbird DM" dialog is not working. To view the document, double click the document name to launch the preview window.

DM-14957: Outlook 2007 - "Document Mailing Options" dialog appears twice when dragging and dropping a document to a new mail message. The email messages are saved appropriately.

DM-12780: Outlook 2007 – Dragging and dropping email messages into DM when holding the control key down results in an error message. To workaround this issue, use the left-click drag and drop to bring up the context menu for a "copy".

DM-14736, DM-14393 and DM-14647 – Outstanding issues based on changes we made to support Outlook 2007 and may present the following symptoms: the tree view may be displayed improperly and intermittently crash Outlook. Research & Development is continuing to work on these issues and will be providing updates as soon as they become available.

7.2 Interceptor Issues

DM-14876: Interceptor for Acrobat Reader 8 - When opening a document into reader and then exiting, the document remains checked out. To unlock the document, exit DM Extensions and log back in to DM Extensions.

DM-13750: Use template document to create new document in Powerpoint2007 gives error.

7.3 Application Integration Issues

DM-13527: DM Application Integration - Word - Quick Retrieve Dialog Box Appears When Editing a Native email Hyperlink. You can edit the hyperlink by clicking Cancel in the Quick Retrieve.

DM-14634: Visio 2007 sp1 Passive COM Integration - Save As and Save in DM menu and File menu are unavailable on specific templates. of the Brainstorming Visio Templates produces the problem, although this issue is not necessarily limited to that template.

DM-14839: Excel 2007 - Vista - Error when saving a native document created from the Windows desktop. When you create an Excel document from the Windows desktop by right-clicking the desktop and selecting New>Microsoft Excel Worksheet, and then you open the document to make edits and click Save, an error is received. Despite the error, the edits are saved.

DM-14643: Error message is displayed when user opens a Hyperlink from PowerPoint 2007.

7.4 DM Extensions Issues

DM-14527: Document(s) left in the Transient state, which don't give the typist full rights, cannot be deleted.

DM-14532: When attempting to open a document from a Search Results window by choosing Document → View from the menu, the buttons, Open, Print and Copy are inactive.

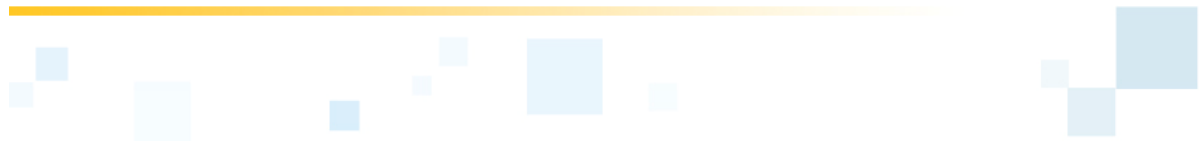
DM-14528: Executing the search options from the Search menu on a Quick Search in a workspace does not perform any actions. This issue only occurs from the DM Extensions Search menu. As a workaround, you can use the right-click context menu from the workspace to edit and delete Quick Searches.

DM-14339: Lotus Notes Client Searches do not return results. An error "View or Navigator 'Adhoc_Search_Results' does not exist" appears. This issue only occurs on Windows Vista SP1 when searches are conducted from within Lotus Notes 7.x.

DM-10807: Selecting E-mail Integration blocks the Client Deployment Utility application for 30+ seconds.

7.5 DM Webtop Issues

DM-14725: The Date/Time field does not work correctly in DM Webtop when entering information in the Email_Sent field on the profile form.



Chapter 8

Files Delivered

A list of affected files can be found [here](#).