



NewgenONE OmniDocs RMS

Release Notes

Version: 4.0 SP1

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1 About this document

These release notes provide information on the features, functionalities, enhancements, and known limitations of NewgenONE OmniDocs RMS (hereinafter "RMS") 4.0 SP1 release. These release notes also include system requirements for installing the product.

1.1 Revision history

Revision date	Description
April 2024	Initial publication

1.2 Intended audience

These release notes are intended for new and existing customers of the RMS platform, Newgen's partners, implementation, sales, and the pre-sales teams.

1.3 Documentation feedback

To provide feedback or any improvement suggestions on technical documentation, write an email to docs.feedback@newgensoft.com.

To help capture your feedback effectively, share the following information in your email:

- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

2 Release summary

The latest enhancements and features in RMS are designed to streamline administrative control, improve usability, and enhance the user experience. This release introduces several key functionalities, including configurable add record modal and order action menu items, allowing administrators to customize the user interface and prioritize tasks.

Usability enhancements, such as locale selection and bilingual support for folder names, improve accessibility for users across different languages.

2.1 Usability

The usability enhancements include:

- **Configurable add record modal** – This feature allows the RMS administrator to customize the add record screen by selecting fields to display, marking fields as mandatory, selecting visibility, and setting default values, thereby minimizing data entry efforts and maintaining data accuracy. Modal metadata changes empower administrators to tailor metadata visibility, ensuring relevant information is easily accessible.
- **EasySearch support on Relation Database Management System (RDBMS)** – Searches can be performed within RMS using EasySearch without relying on the Elasticsearch server. This eliminates the necessity to configure multiple searches. The EasySearch textbox enables searching for items based on metadata and content. However, EasySearch without the Elasticsearch server has limited search capabilities and lacks facets.
- **Viewing office documents through Web Application Open Platform Interface (WOPI)** – This version supports viewing and editing of Microsoft (MS) Office documents based on the WOPI protocol.
- **Re-order action menu items** – This feature allows the RMS administrators to change the display order of operations for any item. It helps in prioritizing tasks, ensuring important ones are completed first. For example, you can prioritize the 'Approve' action by moving it to the top of the list if it's the most important action for a user's tasks.
- **Locale selection** – Users can now choose their preferred language when they log in. This removes the need to change the language from browser settings. For example, if you prefer to use the system in Arabic, you can select Arabic as your language from the login screen itself.

NOTE:

This feature is configurable and can be enabled or disabled via configuration files. By default, it is disabled.

- **Advanced search queries** – RMS now provides join condition support for advanced searches. The inclusion of AND and OR conditions in Fileplan Search enhances query flexibility, allowing users to refine search results based on specific relationships between different data points.

- **Comprehensive search results based on data class fields** – This feature improves the search results by displaying multiple data class fields as separate columns alongside record names.
 - **Scroll down support for record view** – Scrolling down enables viewing the entire record at once, eliminating the need for navigating page by page with the 'next' button.
-

NOTE:

This feature is configurable and can be enabled or disabled via configuration files. For details, refer to the *NewgenONE OmniDocs 11.0 SP2 Patch 1 Configuration Settings Guide*.

- **Download with annotations** – Records can be downloaded with or without annotations through OpAll Viewer.
- **Enhanced Full-text Search (FTS) navigation** – The system now automatically opens the specific page where a keyword was found during the FTS, streamlining navigation and saving users time.
- **Calendar for entering date-type fields** – Entering dates in date-type fields is simplified, allowing manual input followed by pressing enter. This action triggers a calendar to open, displaying the selected date for confirmation.
- **Show upload and download status** – This update displays the upload and download status upon closing the add record modal. Additionally, the download record progress is now shown in the top-right progress queue for easier tracking.

2.2 Security

The security features include:

- **O-Auth support** – Upon activating this feature, third-party applications must be registered through NewgenONE OmniDocs Admin. Following registration, to establish a connection with OmniDocs RMS, the third-party application passes an App ID to obtain the access token for subsequent API calls.
- **Amazon Web Services (AWS) Secrets Manager** – Integrating NewgenONE OmniDocs RMS with AWS Secrets Manager enhances data security. Secrets Manager facilitates the management, retrieval, and rotation of sensitive information throughout their lifecycle.
- **TLS Protocol:** This service pack incorporates compatibility for Transport Layer Security (TLS) protocol 1.3.

2.3 Language support

The product language support includes:

- **Multi-lingual support for Class, File, and Filepart names** – In addition to English, the Class, File, and Filepart can also be named in Arabic. This makes it easier for people who understand different languages to understand the Fileplan structure. For example, you can now name a folder "مشروع أ" in Arabic and "Project A" in English.

NOTE:

The multilingual support can be enabled from NewgenONE OmniDocs Admin.

- **Showing numeral in Arabic** – This feature enables the display of numerals in Arabic script, enhancing readability and usability for users who prefer Arabic numerals.

2.4 Enhancements in disposition process

The enhancements in the disposition process include:

- **Add to consignment** – This action is only available for files with disposition actions such as transfer, destroy, or export. Also, for disposing of multiple files, fileparts, or records simultaneously, they must all have the same disposition action.
- **Keep indefinite** – Items marked as "Keep Indefinitely" appear only in the "Items to be disposed" tab. Upon execution, they move to the "Retained Items" tab. This action is only applicable to items designated with "Keep Indefinitely" as the disposition action.
- **Change disposition action** – The disposition action of a file, file part, or record can now be changed.
- **Change disposition due date** – The disposition due date for a file, file part, or records can be extended even after the previous due date has passed.

2.5 APIs to export and import Fileplan objects

This service pack introduces two new Enterprise JavaBeans (EJBs) application programming interfaces (APIs) for exporting and importing Fileplan objects in bulk. This process occurs in batches.

These APIs enable the creation of custom utilities, and export and import entire classes, files, fileparts, and records in bulk, improving efficiency and ease of use.

2.6 Technical enhancements

The technical enhancements include:

- This Service Pack enables RMS to operate without depending on the iText library which was required before to create PDF reports on results.
- The framework has been upgraded to Angular v16.
- Configuration files are stored in the database instead of the server when configuring the bulk export and import feature.

3 Features inherited from previous releases

This section summarizes features carried over from the previous release of NewgenONE OmniDocs RMS 4.0 Patch 1. Since NewgenONE OmniDocs RMS 4.0 SP1 can be directly deployed over NewgenONE OmniDocs RMS 4.0, it provides insights into features introduced in earlier patches.

3.1 User experience and usability enhancements

The user experience and usability enhancement includes:

- **Selective printing for properties modal** – Users can now choose specific properties to print when viewing details, enhancing printing efficiency and reducing unnecessary paper usage.
- **Navigation of items from notification window** – Easily access items by clicking on notifications, streamlining the workflow, and improving user experience.
- **Show search count in search results and lists** – Easily see the number of results in search queries and lists, providing better context and navigation.
- **Provide linked column in search** – View linked data directly in search results, reducing the need for additional clicks and improving data visibility.
- **Option to open records in new tab** – Users can now open records in separate tabs for multitasking and easy comparison.
- **Ordering of custom modules and clusters** – Customize the arrangement of custom modules and clusters, optimizing the layout for user convenience.
- **Result setting for sorting in personalize and user preference** – Customize sorting options in personalized views, tailoring the interface to individual preferences.

3.2 Data management enhancements

The data management enhancements include:

- **Send folder link via email** – Share links to files, File parts, or classes via email, facilitating collaboration and communication among team members.
- **Large file upload** – Users can now upload and handle large files efficiently, improving data sharing and collaboration.

3.3 Security enhancements

The security enhancements include:

- **Separation of link functional security** – Users can now have different access rights for viewing, adding, and deleting links, enhancing data security and control.
- **Separation of add record and add paper profile functional security** – Improved control over adding records and paper profiles, ensuring data integrity and privacy.
- **Folder color coding based on marking** – Organize and distinguish folders with color codes, making it easier to identify important items at a glance.

4 Supported platforms

RMS 4.0 SP1 supports the following environments:

Operating system	<ul style="list-style-type: none">• Windows 2016, 2019, and 2022 (64-bit) Enterprise Server• Red Hat Enterprise Linux 7.0, 8.0, and 8.3
OmniDocs	OmniDocs 11.0 SP2 Patch 1 must be installed. NOTE: Ensure using the latest available hotfix of OmniDocs.
Application server	<ul style="list-style-type: none">• JBoss EAP 7.4.10, 7.4.12• WebLogic 12.2.1.4, 14C• WebSphere 9.0.5.7 and 9.0.5.15 (installed with IBM SDK 8)
Database server	<ul style="list-style-type: none">• Microsoft SQL Server 2019 and 2022• Oracle 18c, 19c• PostgreSQL 14.4, 15.2, 16.0
Server-side JRE	<ul style="list-style-type: none">• JDK 11• JDK 17 (for JBoss EAP 7.4.8 and later)
Browser	<ul style="list-style-type: none">• Mozilla Firefox 124.0.2 and later• Google Chrome 125.0 and later• Microsoft Edge 123.0 and later• Safari 17.4
Language support	<ul style="list-style-type: none">• English (United States)• Arabic

Upgrade paths

Supported versions for upgrading to RMS 4.0 SP1 include the following RMS versions:

- RMS 3.0 SP1
- RMS 4.0

5 System requirements

This section lists the prerequisites and minimum hardware requirements for installing RMS 4.0 SP1.

5.1 Hardware requirements

The table below lists the minimum hardware requirements for installing RMS 4.0 SP1:

Server (application server and web server)	<ul style="list-style-type: none">• Server-grade machine (4 cores)• 8 GB RAM or more• 200 GB hard drive
Client	<ul style="list-style-type: none">• Intel Core i3 or higher• 4 GB RAM or more• 100 GB hard drive
Database server	<ul style="list-style-type: none">• Server-grade machines (4 cores)• 8 GB RAM or more• 200 GB hard drive

NOTE:

Hardware requirements may change based on the type of deployment and volume.

5.2 Software requirements

Refer to the [Supported platforms](#) section to set up a combination of the operating system, application server, database server, and server-side JRE.

6 Containerization support

This section provides information on the supported environments for the containerization and container deliverables for the RMS 4.0 SP1:

6.1 Supported environments for containerization

The table below lists the supported environments for installing RMS 4.0 SP1 on AWS, Microsoft Azure, and RedHat OpenShift:

Supported environment	AWS	Microsoft Azure	RedHat OpenShift
Container orchestration	<p>Kubernetes Services 1.23 or a later version.</p> <p>The following are the supported sub-platforms:</p> <ul style="list-style-type: none"> • Kubernetes Worker Nodes Host OS – Amazon Linux 2 • Container Base Image - Alpine 3.19 • Application Server - JBoss EAP 7.4.x • Web Server - Java Web Server 5.7.x • JDK - OpenJDK 17 	<p>Kubernetes Services 1.23 or a later version.</p> <p>The following are the supported sub-platforms:</p> <ul style="list-style-type: none"> • Kubernetes Worker Nodes Host OS - Ubuntu • Container Base Image - Alpine 3.19 • Application Server - JBoss EAP 7.4.x • Web Server - Java Web Server 5.7.x • JDK - OpenJDK 17 	<p>OpenShift Container Platform 4.12 or a later version.</p> <p>The following are the supported sub-platforms:</p> <ul style="list-style-type: none"> • Kubernetes Worker Nodes Host OS - RHEL CoreOS 8.x • Container Base Image - Alpine 3.19 • Application Server - JBoss EAP 7.4.x • Web Server - Java Web Server 5.7.x • JDK - OpenJDK 17
Database Server	Aurora PostgreSQL Compatible 16.x	Microsoft SQL Azure (RTM) 12.0.2000.8	Oracle 19c
Browser (Client)	<ul style="list-style-type: none"> • Mozilla Firefox 124.0.2 and above (64-bit) • Google Chrome 125.0 and above • Microsoft Edge 123.0 and above • Safari 17.4 	<ul style="list-style-type: none"> • Mozilla Firefox 124.0.2 and above (64-bit) • Google Chrome 125.0 and above • Microsoft Edge 123.0 and above • Safari 17.4 	<ul style="list-style-type: none"> • Mozilla Firefox 124.0.2 and above (64-bit) • Google Chrome 125.0 and above • Microsoft Edge 123.0 and above • Safari 17.4
Language	English (United States)	English (United States)	English (United States)

6.2 Container deliverables

The following table lists the container deliverables:

Deliverables	AWS	Microsoft Azure	Red Hat OpenShift
Container images	<ul style="list-style-type: none"> OmniDocs Web Components OmniDocs Web Service Components OmniDocs EJB Components OmniDocs Add-on Services (Wrapper, AlarmMailer, Scheduler, ThumbnailManager, and LDAP) EasySearch (Apache Manifold) Text Extraction Manager or Full-Text Search (TEM/FTS) OmniScan Web Components RMS SharePoint Adapter 	<ul style="list-style-type: none"> OmniDocs Web Components OmniDocs Web Service Components OmniDocs EJB Components OmniDocs Add-on Services (Wrapper, AlarmMailer, Scheduler, ThumbnailManager, and LDAP) EasySearch (Apache Manifold) Text Extraction Manager or Full-Text Search (TEM/FTS) OmniScan Web Components RMS SharePoint Adapter 	<ul style="list-style-type: none"> OmniDocs Web Components OmniDocs Web Service Components OmniDocs EJB Components OmniDocs Add-on Services (Wrapper, AlarmMailer, Scheduler, ThumbnailManager, and LDAP) EasySearch (Apache Manifold) Text Extraction Manager or Full-Text Search (TEM/FTS) OmniScan Web Components OmniDocs SMS RMS SharePoint Adapter
	<p>NOTE: These container images are delivered using private container repositories such as Azure Container Registry, AWS Elastic Container Registry, RedHat Quay Registry, and DockerHub, or in the form of compressed files that can be shared over the FTP or a similar kind of media.</p>		
Configuration files	<ul style="list-style-type: none"> OmniDocs11.0Web OmniDocs11.0Ejb OD11.0Services EasySearch11.0 TEM11.0 OmniscanWeb6.0 SharePointAdapter_RMS 	<ul style="list-style-type: none"> OmniDocs11.0Web OmniDocs11.0Ejb OD11.0Services EasySearch11.0 TEM11.0 OmniscanWeb6.0 SharePointAdapter_RMS 	<ul style="list-style-type: none"> OmniDocs11.0Web OmniDocs11.0Ejb OD11.0Services EasySearch11.0 TEM11.0 OmniscanWeb6.0 OD11.0SMS SharePointAdapter_RMS
YAML files	<ul style="list-style-type: none"> OmniDocs11.0Web.yml OmniDocs11.0Web_Services.yml OmniDocs11.0EJB.yml OmniDocs11.0Services.yml EasySearch11.0.yml EasySearch11.0_ApacheOnly.yml TEM11.0.yml OmniScanWeb6.0.yml RMSSharePointAdapter.yml AWS_ALB-IngressController.yml buildspec.yml 	<ul style="list-style-type: none"> OmniDocs11.0Web.yml OmniDocs11.0Web_Services.yml OmniDocs11.0EJB.yml OmniDocs11.0Services.yml EasySearch11.0.yml TEM11.0.yml OmniScanWeb6.0.yml RMSSharePointAdapter.yml AzureFile_PV_PVC.yml AppGateway-IngressController 	<ul style="list-style-type: none"> OmniDocs11.0Web.yml OmniDocs11.0Web_Services.yml OmniDocs11.0EJB.yml OmniDocs11.0Services.yml EasySearch11.0.yml TEM11.0.yml OmniScanWeb6.0.yml OmniDocs11.0SMS.yml RMSSharePointAdapter.yml quay-secret.yml Storage_PV_PVC.yml IngressController.yml

Deliverables	AWS	Microsoft Azure	Red Hat OpenShift
Documents for deployment and configuration	<ul style="list-style-type: none"> NewgenONE OmniDocsRMS 4.0 SP1 Newgen Enterprise Product Containerization Guide for AWS NewgenONE OmniDocsRMS 4.0 SP1 Configuration and Deployment Guide for AWS NewgenONE OmniDocsRMS 4.0 SP1 Docker Containers Custom Code Deployment Guide for AWS NewgenONE OmniDocsRMS 4.0 SP1 Docker Containers Hotfix Deployment Guide for AWS 	<ul style="list-style-type: none"> NewgenONE OmniDocsRMS 4.0 SP1 Newgen Enterprise Product Containerization Guide for Azure NewgenONE OmniDocsRMS 4.0 SP1 Configuration and Deployment Guide for Azure NewgenONE OmniDocsRMS 4.0 SP1 Docker Containers Custom Code Deployment Guide for Azure NewgenONE OmniDocsRMS 4.0 SP1 Docker Containers Hotfix Deployment Guide for Azure 	<ul style="list-style-type: none"> NewgenONE OmniDocsRMS 4.0 SP1 Newgen Enterprise Product Containerization Guide for Openshift NewgenONE OmniDocsRMS 4.0 SP1 Configuration and Deployment Guide for Openshift NewgenONE OmniDocsRMS 4.0 SP1 Docker Containers Custom Code Deployment Guide for Openshift NewgenONE OmniDocsRMS 4.0 SP1 Docker Containers Hotfix Deployment Guide for Openshift

7 Deployment steps

To deploy RMS 4.0 SP1, refer to the *NewgenONE OmniDocs RMS 4.0 SP1 Installation and Upgrade Guide*.

For containerization-based cloud deployments, refer to the following guides:

Docker environment	Guide
Amazon AWS	NewgenONE OmniDocs RMS 4.0 SP1 Configuration and Deployment Guide for AWS
MS Azure	NewgenONE OmniDocs RMS 4.0 SP1 Configuration and Deployment Guide for Azure
Red Hat OpenShift	NewgenONE OmniDocs RMS 4.0 SP1 Configuration and Deployment Guide for OpenShift

8 Rollback plan

For rollback steps, refer to the *NewgenONE OmniDocs RMS 4.0 SP1 Installation and Upgrade Guide*.

9 Integration strategy

Third-party applications must be registered through NewgenONE OmniDocs Admin. To establish a connection with NewgenONE OmniDocs, initial access to the application must be granted. Subsequent API calls can be made using the access details token (session valid and access token tags). When O-Auth is enabled, the value *isEncryptForCustom* must not be “Y”, it is supported for “A”.

10 Software deliverables

The following artifacts are available with the NewgenONE OmniDocs RMS 4.0 SP1 release:

- **Manuals**
 - NewgenONE OmniDocs RMS 4.0 SP1 Installation Guide
 - NewgenONE OmniDocs RMS 4.0 SP1 Administration Guide
 - NewgenONE OmniDocs RMS 4.0 SP1 User Guide
 - NewgenONE OmniDocs RMS 4.0 SP1 Developer Guide
- **Release Notes**
- **Setup** (binaries to install NewgenONE OmniDocs RMS 4.0 SP1)

11 Major bug fixes

The major bug fixes include:

- Users are notified when checking out an already checked-out document by another user.
- Timezone adjustment for date fields: Date fields now reflect accurate dates based on the user's timezone, resolving issues with date display discrepancies. Earlier it was only for data time fields.

12 Known limitations

The table below lists the known limitations of the RMS 4.0 SP1 release:

S.No	Issues and limitations	Workaround
1.	Certain text in the SharePoint On-premises version is not being displayed in Arabic. This means that some text content in the SharePoint on-premises version may not be rendered or displayed correctly when set to Arabic language. It will only be displayed in English.	No issues while working with SharePoint online.
2.	If any data class field has a validation type as an integer – it does not support Arabic characters as the system has not associated the value as an integer.	NA
3.	For a user that has logged in using the Arabic locale, the easy search result displays the File, Filepart, and Record path in English only and not in the Arabic language.	NA
4.	Bulk export and import can be employed up to 50 MB only. Any file more than that must be entertained through large file export.	Utilize the NGRM_Exportfolder and NGRM_ExportRecord APIs introduced in the service pack to perform bulk exports of folder and records larger than 50 MB.

S.No	Issues and limitations	Workaround
5.	Export and Import mapping created for older versions of RMS not supports in RMS 4.0 SP1.	Create a fresh mapping through the RMS Admin module.

13 Release artifacts

The release artifacts are as follows:

S. No	Enclosed	Yes / No / NA
1.	Installation Guide (describing installation procedure for the network as well as standalone version; dependency of software on the operating system and other software; structure and paths of various *.ini files, minimum software, and hardware requirements), User guide, Administration Guide	Yes
2.	New function listing	Yes
3.	Modified functions	Yes
4.	Discontinued functions	NA
5.	Problem status (for all the pending bugs, give bug number and comments, and provide further details).	Yes
6.	COTS components (If Any)	NA
7.	Others (if any, for example, Freeware, open-source, executables).	NA

14 Version number

NewgenONE OmniDocs RMS 4.0 SP1

15 Release dates

Following are the release dates:

- **Product release date** – 25th April 2024
- **Market release date** – 9th May 2024

16 Product development location

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