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## Important to Know

The purpose of this document is to provide information regarding the DocuPhase Platform upgrade to DocuPhase version 6.4: what has been added, enhanced, and is resolved or unresolved.

### **IMPORTANT!**

- *This document is subject to change, prior to public release of DocuPhase v6.4.*
- *Vendors and Clients are responsible for reading all Release Notes provided with each upgrade.*
- *Please be sure to read all published or posted Release Notes, from your current version through the new version being applied: including any Release Notes for versions you may have skipped over (e.g., if you are upgrading from 5.1 to 6.4, it is important to read the Release Notes for version 6.0 through 6.3).*

## Questions?

If you have specific questions or need more information about the information included in this document, please contact DocuPhase at any of the following:

**Email:** [support@docuphase.com](mailto:support@docuphase.com)

**Phone:** (727) 441-8228

**Website:** <https://www.docuphase.com/contact-us>


### **BEST PRACTICE**

*When sending an email please use the following format:*

- *In the Subject line: "Request for information about 6.4 Upgrade"*
- *In the Body of the email:*
  - *Give a brief description of the information you are looking to obtain.*
  - *Provide the best contact name, phone number, and email address.*

## Items Included in this Release







### New Features and Enhancements

AREA/ COMPONENT/ ELEMENT	REF #	DESCRIPTION
<b>Adv Queue▶ Columns</b>	30125	When columns are selected, those selections remain in place from one session until another: until they are changed (the changes are saved across sessions).
<b>Adv Queue▶ Columns</b>	30127	<ul style="list-style-type: none"> <li>The Checkbox and Exit Path columns cannot be moved (i.e., moved to the left or right of other columns in the grid).</li> <li>The TaskName filter can now be used to sort tasks by their names in that grid.</li> <li>The Priority filter can now be used to filter items in that grid according to their priority levels (i.e., All, Critical, High, Medium, Low).</li> <li>Data type association has been improved for Search and filtering of columns.</li> <li>The KeyValue column toggles between number column and a string column depending on its contents: improving sorting and filtering.</li> </ul>
<b>Adv Queue▶ Process Panels</b>	30331	<ul style="list-style-type: none"> <li>To increase efficiency, data is retrieved and loaded only when a user expands (+) one of the Process Panels.</li> <li>Clicking directly on a Panel (vs expand (+)/collapse (-) opens just that panel. However, multiple panels may be opened using the expand (+)/collapse (-) icons.</li> <li>If a user opens multiple Process Panels, then leaves the Work Item screen to do anything other than to work on a Work Item, only the top Panel is open the next time they visit the Work Item screen.  However, if multiple Process Panels are left open when a user leaves the Work Item screen specifically to complete a work item, the Panel for that Work Item is still open upon return to the Work Item screen.</li> <li>When a Process Panel is hidden, its data is also hidden (therefore, not loaded): decreasing response time.</li> <li>The most recent tab (Active, Suspended, Waiting) accessed in a Process Panel is saved (when the user navigates away from the Process Panel): maintaining the same open tab the next time the user visits that Panel.</li> <li>Icons and priority colors have been added and/or updated.</li> <li>Process Panel counts display with an underline in the color of the highest priority item in the queue. For example, in a single Panel, there items may appear as 50 low, 12 medium, 2 high, and 1 critical (i.e. because the color red indicates a critical item, and Critical is the highest priority status, the corresponding Panel appears with an underling of red).</li> <li>When a user hovers over a Process Panel count, a tooltip appears to show the counts by priority.            </li> <li>A user can click on a Process Panel count icon (📧 1, ⏸ 0, ⌛ 0) to display the corresponding tab (i.e., Active, Suspended, Waiting items).</li> <li>Process Panels are now sortable, via drag and drop functionality: hovering over the “drag handle” (☰) a tooltip appears and (in most browsers) the cursor changes to a “grab” or “move” (🖱) cursor.</li> </ul>



[New Features and Enhancements▶ Advanced Queue](#) (continued on next page)

AREA/ COMPONENT/ ELEMENT	REF #	DESCRIPTION
<i>New Features and Enhancements</i> ► <i>Advanced Queue (continued)</i>		
Adv Queue ► Reassign & Priority Button	30331	<ul style="list-style-type: none"> <li>The label/function of the <b>Reassign &amp; Prioritize</b> action button is based on the permissions set for a user; it may appear as <b>Reassign &amp; Prioritize</b>, <b>Reassign</b>, or <b>Priority</b>: allowing the user to perform the specific labeled function(s).</li> </ul> <p>In addition to adding Reassign/Priority loading and saving indicators, Load and Save failure messages are now included</p>
Adv Queue ► Searching		<ul style="list-style-type: none"> <li>A Clear option (X) was added to the Search entry field.</li> <li>Searching by date can now be performed using search criteria dates in varied formats (2019 mar 2, march 2 2019, 3-2-2019, 3/2/2019, etc.). However, specific time criteria entries are not recognized.</li> </ul>
Adv Queue ► Toolbar (Action Buttons)		<ul style="list-style-type: none"> <li>Action buttons and work item list are hidden during list refresh.</li> <li>Action buttons are disabled by default. However, these buttons are enabled when at least one row in the list is selected.</li> </ul>
Adv Queue ► Work Item List		<ul style="list-style-type: none"> <li>“Lazy loading” was implemented to make it possible for Work Item Lists to be loaded only when the user requests that data: improving load time and preventing “drag” on the server.</li> <li>When a Waiting or Suspended Work Item is released, the active Work Item list automatically refreshes the next time a user accesses it. In addition, when releasing a Waiting Work Item, a progress indicator is displayed to confirm that work is being processed.</li> <li>The AQ Search and Show &amp; Hide Processes features are disabled whenever the Work Queue (i.e., Work Items) is loading. Not hidden just disabled</li> <li>When the AQ Work Item list is empty, the action buttons (i.e., Search, and Show &amp; Hide Processes) are disabled, and “No work-items available” message appears.</li> <li>Waiting exit path drop-down was updated to display a long dash instead of the value of “None”.</li> <li>The columns hidden by default, are also now hidden from the Work Item List column section. However, they can be displayed if the user clicks on the column section (within the column menu) 5 times within one second.</li> </ul> <div data-bbox="500 1304 1435 1587" style="border: 1px solid #00a09a; border-radius: 10px; padding: 10px; margin: 10px 0;"> <p><b>NOTES</b></p> <ul style="list-style-type: none"> <li><i>Columns that are set as hidden by default are those that are generally used by TPOCS and DocuPhase staff to troubleshoot issues,</i></li> <li><i>The default column settings are saved to the browser; therefore, they are reset when cache is cleared.</i></li> <li><i>Hidden columns are Work Item List-specific, therefore, they must be set for each list.</i></li> </ul> </div> <ul style="list-style-type: none"> <li>To optimize system processing, Work Item List sizes are now static, and set to 10, 15, &amp; 20. (i.e., no longer user configurable/read from the config file). In previous versions, users were able to set the number of items per list to such large numbers that system processes would freeze.</li> <li>In most browsers, the cursor is changed to a “Wait” indicator while a list is being rendered.</li> </ul>
Dynamic Document Security (DDS)	32904	The TPOC or DocuPhase PS can now assign a document for editing by particular users only. Unlike Document Level Security, DDS is set in the system (behind the UI), and has a more global intent, rather than being attached to specific Indexes.



*New Features and Enhancements (continued on next page)*

AREA/ COMPONENT/ ELEMENT	REF #	DESCRIPTION
<i>New Features and Enhancements (continued)</i>		
<b>Forms</b>	33408	<ul style="list-style-type: none"> <li>Fillable Forms can be seen via a list or tiles view. The new Tiles at-a-glance format, lets Users immediately see pertinent Forms data (e.g., Forms name, category, description), as well as a representative icon and color coding that make the grouping of Forms more apparent; thus allowing quick selection and access to their forms.</li> </ul> <div data-bbox="526 436 1409 527" style="border: 1px solid #add8e6; padding: 5px; margin: 10px 0;"> <p> <b>NOTE</b> The Tiles view is not available when using the DocuPhase in the IE browser.</p> </div> <ul style="list-style-type: none"> <li>The Application and Categories lists were updated with a new design that includes the ability to show and hide Applications/Categories – depending upon the chosen view.</li> <li>A new forms icon selector was added to the Forms Manager: allowing the Admin to add a representative icon to tiles (as described in the item above).</li> </ul>
<b>General System Security</b>	32940	<p>A security option for filtering Out IIS Server Response Headers has been added.</p> <div data-bbox="526 737 1377 869" style="border: 1px solid #add8e6; padding: 5px; margin: 10px 0;"> <p> <b>NOTE</b> For more information, please refer to Appendix E - Filtering Out IIS Server Response Headers, in the DocuPhase Installer Guide.</p> </div>
<b>HTML5 Viewer</b>	32834	<ul style="list-style-type: none"> <li>Viewer and Annotation tab toolbar icons have been updated.</li> <li>Two print options are now available: <ul style="list-style-type: none"> <li>One-Click Print: directly displays the Print dialog where user can choose basic local printer settings.</li> <li>Advanced Print displays the Advanced Print dialog where user chooses pages to be designated for printing (i.e., all, selected, or a range of pages within the document); as well as whether any Redactions and/or Annotations should be included/excluded on the printed Document.</li> </ul> </li> <li>The Undo option (  ) can now be used on Rubberstamps (i.e., the last rubberstamp added can be removed, or if a Rubberstamp has been moved, it can be restored to its most recent, previous location on the page). (  ) can be used to restore the most recently undone (  ) action performed on a Rubberstamp.</li> </ul>
	DP-798	Rubber stamps can now be dynamically sized with '+' and '-' button
<b>Licensing</b>	32895, 32976, 32977	<p>Phone Home Licensing has now been implemented, and made available for clients who want to enable this feature. This new service perpetually sends automatic, daily API calls (to the DocuPhase license database) to validate the expiration date: making it possible for DocuPhase to renew or upgrade a license without customer interaction.</p> <div data-bbox="516 1539 1430 1713" style="border: 1px solid #add8e6; padding: 5px; margin: 10px 0;"> <p> <b>NOTE</b> Upon installation of DocuPhase 6.4, Phone Home Licensing (LicenceChecker) is disabled by default; it needs to be enabled for any client who wants to use Phone Home Licensing.</p> </div>

*New Features and Enhancements (continued on next page)*

AREA/ COMPONENT/ ELEMENT	REF #	DESCRIPTION
<i>New Features and Enhancements (continued)</i>		
<b>Licensing</b>	32895, 32976, 32977	<p>Phone Home Licensing has now been implemented, and made available for clients who want to enable this feature. This new service perpetually sends automatic, daily API calls (to the DocuPhase license database) to validate the expiration date: making it possible for DocuPhase to renew or upgrade a license without customer interaction.</p> <div data-bbox="496 411 1419 590" style="border: 1px solid #add8e6; padding: 10px; margin: 10px 0;"> <p> <b>NOTE</b></p> <p><i>Upon installation of DocuPhase 6.4, Phone Home Licensing (LicenceChecker) is disabled by default; it needs to be enabled for any client who wants to use Phone Home Licensing.</i></p> </div>
<b>Login Screen</b>	32817	<p>The following security options are now available:</p> <ul style="list-style-type: none"> <li>• Password Reset Self-Service A Reset Password link can be included on the Login screen. When a user clicks the link, an email is sent to the user allowing them to reset the password where they can reset.</li> <li>• Automatic Account Locking is an added layer of security that locks the account of any user whose name and password have been used to unsuccessfully log into their account. In System Options, system administrators can now set a timeout duration and/or number of attempts allowed before an account is locked.</li> <li>• A Request for New Account link can be added to the Sign In screen. When the link is displayed, a new user who should (but doesn't) have access to the system, can use it to display a dialog window into which they can enter basic information. That information is then submitted to the System Administrator who can then verify information, and configure the new user account.</li> </ul>
<b>Main Header</b>	31108	<p>The Main Header Icons have been updated, the User Name has been moved from the footer to the header, appearing in alignment with icons and the Search field, and the User Preferences and Logout links are now in a drop down menu accessed by hovering over the User Name. (Related to TFS:34524)</p>
<b>Online Help</b>	33042	<p>Help has been updated to include version 6.4 changes implemented that directly affect the end user experience.</p>
<b>Prerequisites</b>	LV	<p>Users who have installed any version prior to 6.4 will notice that prerequisites for the installation of 6.4 have been reduced: making the preparations for installation faster and easier.</p> <div data-bbox="472 1362 1492 1604" style="border: 1px solid #f08080; padding: 10px; margin: 10px 0;"> <p> <b>WARNING!</b></p> <p><i>When upgrading to 6.4, DO NOT UNINSTALL any previously installed requirements/components. Some of those items are not included in the 6.4 installation, but may be required for the continued use of other applications installed on the system (e.g., Microsoft).</i></p> <p><i>Only add new items as listed in the <a href="#">Required Installations and Configurations section of the DocuPhase Standard Requirements Specification Guide</a> (e.g., OpenJDK, .NET Framework 4.8, etc.).</i></p> </div>
<b>Referral Program Link</b>	34524	<p>A link was added to the right side of the footer of the DocuPhase window that takes the user to a web page, providing information about the DocuPhase Referral Program (<a href="https://www.docuphase.com/referral">https://www.docuphase.com/referral</a>). The link appears in the footer of every screen, and can be turned on/off via <a href="#">System Options in DocuPhase</a>. (Related to TFS:31108)</p>

*New Features and Enhancements (continued on next page)*


AREA/ COMPONENT/ ELEMENT	REF #	DESCRIPTION
<i>New Features and Enhancements (continued)</i>		
Search Results	25771/ 26770	To meet Client requests, Print Event History (  ) now allows all large field data (e.g., 256 characters) to be viewed (i.e., expanded, wrapped, etc.). Previous versions limited the number of characters that could be viewed.  <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> <b>NOTE</b></p> <p><i>Previous versions limited the number of characters that could be viewed. See Reference # 26770, on page 8 of this document.</i></p> </div>
Workflow/ Progression Designer	DP-161	The ability to change the name of the sender when sending email from Progression was added. This allows recipients to more easily identify the purpose(s) of the alerts they receive.

## Updates, Revisions, and Fixes

### Capture

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
Upload from Email	23922	Enabling the <b>Loading from Email</b> option prevented the User Inbox <b>From</b> field from working.	Resolved & Verified
Indexing (Manual)	23693	<ul style="list-style-type: none"> <li>Viewer Error that occurred when DLS permissions were not granted needed to be re-worded.</li> <li>The Viewer Support Level for requested document could not be determined.</li> </ul>	

### Database

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
ODBC	LV/EA/K M	Client-side lookups via ODBC must remain configured in x32. However, all 6.4 server-side components now use x64 instead of x32 (thus requiring x64 ODBC - mostly due to LEAD). This means that all Server-side lookups via ODBC must be configured in x64, including the following: Data Exchange, Barcoder, iDox, Progression, and xTractor.  <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> <b>NOTES</b></p> <ul style="list-style-type: none"> <li><i>ScanDox server lookups are sent through the Application Server that is now 64bit. Because of this, any lookups configured on a server using ODBC <b>must be re-created</b> using the x64 ODBC driver.</i></li> <li><i>ScanDox lookups are configured locally, therefore can still use x32 ODBC drivers.</i></li> </ul> </div>	Resolved & Verified
	DP-1637	With the upgrade to TLS1.2 (for SSL), OLEDB is no longer supported: therefore, ODBC is now required for Progression Studio Data Bots to work. The required ODBC driver is included in the DocuPhase Prerequisites folder.	

*Updates, Revisions, and Fixes (continued on next page)*

*Updates, Revisions, and Fixes (continued)***Forms**

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Email</b>	33364	Users whose email contained a special character (e.g. an apostrophe for the name O'Hara) were unable to view Forms	Resolved & Verified
<b>Forms Creator</b>	34383	Form Creator OLEDB driver did not support TLS 1.2	OLEDB driver changed to ODBC - Verified
<b>Forms Designer</b>	N/A	Forms Designer is no longer supported for use with the IE browser.	N/A
<b>Forms Manager</b>	32885	Connection to the Forms database was sometimes prevented because of an incorrect form connection string.	Resolved & Verified
<b>Hyperlink</b>	33428	Changes to a Form resulted in an error if the original Form contained a hyperlink.	
<b>License Server</b>	31351	Licensing Crashes when forms connection string is configured for Windows Auth.	

**Installer**

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Database Install/Upgrade</b>	32863	There was a wording issue for the Repository User field error message, reading as "Repository user name is in incorrect format or does exist" (rather than "...doesn't exist").	Resolved & Verified
<b>Single Installer</b>	33328	When using Single Installer semicolons were removed from connection strings.	

**License Manager**

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Upgrading</b>	32898	An Initialization error occurred when upgrading a license.	Resolved & Verified

**Progression Designer**

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Service</b>	33307	Database connection errors were not logged in the corresponding tracelog.	Resolved & Verified
<b>ODBC</b>	DP-1637	See the <a href="#">Database»ODBC section</a> , on page 6, of this document for more information.	

*Updates, Revisions, and Fixes (continued on next page)*



*Updates, Revisions, and Fixes (continued)*

## Search

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Application</b>	32945	An error message (i.e., Too many parameters in search clause...) displayed when using a UDL index to perform an Application search.	Resolved & Verified
<b>Multiple Index Values</b>	33443	No results were returned if/when using two or more values (separated by ; or , or + or &) for a single Index.	
<b>Search Results</b>	26770	Information was sometimes truncated on the Print Event History page. This was resolved with enhancement completed under reference # 25771 (as noted on page 6 of this document).	
	33094	Object Status value of 'ALL' was not retained when 'Edit Last Query' was from Search Results.	
	33152	Users were unable to navigate to other documents using arrow keys unless they hit the 'Tab' key first.	

## Single Sign-On

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>ADFS SSO with SAML</b>	32908	Unable to configure ADFS SSO with SAML integration, unless the UserName contained the user email address.	Resolved & Verified






## SQL

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>SQL Server</b>	33314	More than two connections (the maximum) were made to the SQL Server when "Application Name = Form Creator" was used in the connection string.	Resolved & Verified
<b>System Configuration</b>	32893	In previous versions, the full platform version of DocuPhase Suite (Forms included) could not be configured when using a non-standard SQL port number.	

## Viewers - HTML 5

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>HTML5 Viewer</b>	DP-799	<ul style="list-style-type: none"> <li>Enhanced page range option for save/print/email. You can now use non sequential page ranges. Ex: 1-5, 8, 10, 15-20.</li> <li>Enhanced thumbnail selection. You can now use shift + left click and ctrl + left click to select multiple thumbnails.</li> <li>Fixed bug where pages would not keep their order after check-in when you did cut &amp; paste to change order</li> </ul>	Resolved & Verified

*Updates, Revisions, and Fixes* ► *HTML5 Viewer (continued on next page)*

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<i>Updates, Revisions, and Fixes</i> ▶ <i>HTML5 Viewer (continued)</i>			
<b>HTML5 Viewer</b> ▶ <b>Annotations</b>	23951	After an upgrade to 6.1., Annotations previously created in the version 5.1 Heavy Weight Viewer were not displayed by the HTML5 Viewer.	Resolved & Verified
	26332	The Show/Hide Annotations icon (  ) was not indicating whether Annotations were on or off. Background color now darkens to Show All (  ) vs Hide All (  ).	
	29384	Deselection of any annotation was allowing user to exit that Annotation.	
	29719	Annotations were disabled if Cancel was used when Saving a Document in its original format.	
	34828	Documents with more than 1,000 pages, as well as Annotations and redactions could not be downloaded.	
<b>HTML5 Viewer</b> ▶ <b>Annotations</b> ▶ <b>Rubberstamps</b>	19870	Selected/active rubber stamp did not remain selected/active when moving between documents.	
	26090/ 33174	Rubberstamp annotations were not appearing in the same size (i.e., DPI) for all document types.	
	27726	Annotations were minimized after changing Annotation opacity property.	
	27729	The Rubber Stamp applied to a page was reversed upon rotation of the page.	
	27968/ 31157	The Rubber Stamp (  ) mode did not deactivate after clicking on the Select icon. (  )	
<b>HTML5 Viewer</b> ▶ <b>Edge Browser</b>	26345	Once a document was selected and displayed, any subsequently selected documents could not be displayed.	
<b>HTML5 Viewer</b> ▶ <b>Email</b>	20896	Changing email addresses and attempting to send a document resulted in time-out.	
	28407	There was an issue with the email page range option.	
	33356	When attempting to email document, the Email password was not saved.	
	33410	When attempting to email document Email password was not saved if it contained a “curly” (left or right) bracket.	
<b>HTML5 Viewer</b> ▶ <b>Forms</b>	36086	The Shift-Click function used on open the pop-out viewer, the Form refreshed and cleared any unsaved information	
<b>HTML5 Viewer</b> ▶ <b>GIF files</b>	20885	GIF document was not correctly saved.	
	28148	When saving gif files, all pages were saved even when specific pages were specified.	
<b>HTML5 Viewer</b> ▶ <b>IE11 Browser</b>	32791	Mp3 files could not play audio when using IE11.	
<b>HTML5 Viewer</b> ▶ <b>JPG files</b>	27991	There was an issue with rotating JPG images.	
<b>HTML5 Viewer</b> ▶ <b>Open MS Office Documents</b>	20168	The options displaying an MS Office Document did not work (i.e., 'Open in Word', 'Open in Excel' or 'Open in PowerPoint')	
<b>HTML5 Viewer</b> ▶ <b>PDF files</b>	21916	In some instances text in PDFs were illegible.	
<b>HTML5 Viewer</b> ▶ <b>Print</b>	28422	There was an issue with the print page range option.	
<b>HTML5 Viewer</b> ▶ <b>Properties</b>	19926	Not all document properties were displayed.	

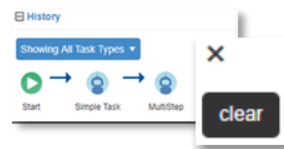
*Updates, Revisions, and Fixes* ▶ *HTML5 Viewer (continued on next page)*

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<i>Updates, Revisions, and Fixes</i> ▶ <i>HTML5 Viewer (continued)</i>			
<b>HTML5 Viewer</b> ▶ <b>Revision Control</b>	32135	After rotating a page, then selecting another document for check-in, the viewer retains the original document remained In the Viewer rather than the newly selected document.	Resolved & Verified
	36078	Annotations added to documents without Revision Control, were not being saved with the document.	
<b>HTML5 Viewer</b> ▶ <b>Save Document</b>	26366	Documents could be saved regardless of range page number entered in Pages option in Document Save pop-up.	
	26603	Black and white Jpeg/jpg files (with or without annotations) were not saved.	
	27671	When attempting to save a document displayed in the Viewer, <b>radio button options</b> were not properly aligned.	
	27676	Maximized, saved document didn't scale all controls	
	29669	Saved, downloaded, or checked-out documents did not match Original document	
	30036	Annotations were not maintained when a document was saved.	
	DP-548	When multiple users simultaneously performing document Save/Print spikes occurred on server CPUs.	
	DP-549	Document Save/Print function took an excessive amount of time to complete	
DP-689	Documents of 1000 pages or more could not be saved with Annotations.		
<b>HTML5 Viewer</b> ▶ <b>Send to ScanDox</b>	36087	Send to ScanDox did not work for Office documents.	
<b>HTML5 Viewer</b> ▶ <b>Show Document Text</b>	28329	Scrolling through front Document text also caused scrolling in the document behind.	
	28329	Scrolling through the text using the "Show Document Text" feature caused scrolling to occur in the document it.	
<b>HTML5</b> ▶ <b>Enter Text/Note</b>	20405	'Enter Text...' or 'Enter Note...' default text inside a Note or Text annotation had to be removed by the user before	
<b>HTML5 Viewer</b> ▶ <b>Thumbnail Viewer</b>	30540	Clicking on certain pages in the Thumbnail Viewer, did not display corresponding page in Viewer.	

*Updates, Revisions, and Fixes (continued on next page)*

## Updates, Revisions, and Fixes (continued)

## Workflow, Classic and Advanced Queues, Work Item Viewer

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Advanced Queue (AQ)</b>	32880	When a User clicked on the Select All option, Work Items were not displayed in the designated sort order.	Resolved & Verified
	32969	In Chrome, attempting to Return to Queue, after using the Perform Work in the Workflow By Document view, caused an error to display.	
	35941	Error displayed in certain SSL environments, and documents were not loaded correctly.	
<b>Work Item Viewer</b>	DP-656	URL created by the 'Copy Link' function was invalid	
	33099/ 34334	Document indexes could be updated by one user, despite work items being locked by another user.	
	33407/ 34335	Newly created (or added) items to a UDL were not sorted when working in Work Item Viewer.	
	32978/ 33047	Custom 'Copy Link' was not following set custom format as coded in web.config	
	31239	When changing the primary document in a multi-app binder definition that already contained work items, binder documents disappeared, while the original primary document no longer defined which documents were held in the work item; no warning message appeared stating that changing the Binder documents order may cause the current work items to break.	
	31239	Links to documents in multi-app binders broke, with no warning to the user if both of the following conditions occurred: a) if the order of the primary document, and b) the primary document was in a binder definition that already contained work items.	
	31246	Wording for Suspension options was misspelled (i.e., "Half a Days" instead of "half a day").	
	32820	When using Revision Control with Tracking, the Viewer wasn't refreshing after downloading and checking out a file.	
	33067	Duplicate items appeared in multiple queues at the same time, and could be worked by two different users.	
	34835	Documents that were viewable from Search Results are also viewable in WIV, despite DDS setting.	
36127	When clicking the "Workflow" tab to return from (and unlock) the work item, Work Items were not unlocked when using Chrome.		
<b>Work Items ► Workflow</b>	33043	Any Application with an index having a Sort Order value of "NULL" displayed an error when Work Items were loading.	
	31740	In Work Item History, there was no tool tip for the Clear option. <div data-bbox="1036 1570 1318 1717" data-label="Image">  <p>The screenshot shows a 'History' section with a dropdown menu set to 'Showing All Task Types'. Below this are three task types: 'Start', 'Simple Task', and 'MultiStep', each with a corresponding icon and a right-pointing arrow. A tooltip is visible over the 'clear' button, which is a dark grey rectangle with the word 'clear' in white text.</p> </div>	

Updates, Revisions, and Fixes (continued on next page)

*Updates, Revisions, and Fixes (continued)*
**xTractor**




AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE
<b>Document Separator</b>	32953	When the Document Separator was enabled in the corresponding template configuration, a connection string error occurred during document processing.	Resolved & Verified

**Miscellaneous**

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	STATUS/ NOTE	
<b>Application Merge</b>	DP-1022	Application Merge tool failed to move Office documents	Resolved & Verified	
	34430	Application Merge failed if source annotations data was set to Null		
<b>Applications</b>	33218	De-implemented Applications containing documents could not be deleted		
<b>Datasync▶Index Values</b>	33111	Datasync stripped out apostrophes from Index Values the (e.g., O'Hara was changed to OHara).		
<b>Document Export</b>	33346	Incorrect file extension/format was generated when exporting a document that had an Export Definition set as .csv for output.		
<b>DocuPhase Server▶Installation</b>	32979	ProgressionConnectionString from the DocuPhaseServer web.config was not valid when installing DocuPhase Server via individual .msi.		
<b>DocuPhase Server▶Web.config</b>	33327	A typo the in DocuPhase Server Web.config filed caused an error when uncommented		
<b>DocuPhase Services</b>	33246	Services were ignoring the set reports period and just reporting the default time.		
<b>Forms Creator</b>	34383	Form Creator OLEDB driver did not support TLS 1.2		OLEDB driver changed to ODBC - Verified
<b>Full Text Search</b>	DP-652	FullTextService processing of documents failed.		Resolved & Verified
<b>SOAP Services</b>	36153	Using the applicationserver/dataservice.asmx/UpdateIndexValues SOAP request added timestamp next to the user name in the ModifiedBy index: only the user name should appear there.		
<b>SSL Tracelog</b>	33511	When SSL was enabled iDatix.Plugins.MetadataNotifications.dll caused unnecessary entries in the tracelog.	The dll file was removed.	
<b>Trace Error</b>	36128	Eliminated exception causing an erroneous trace warning.	Resolved & Verified	
<b>Viewer Cache</b>	33268	New storage path was ignored when set in DocuPhase Viewer Cache configuration.		
	33293	New cache size was ignored when DocuPhase Viewer Cache configuration was modified to reduce maximum cache size.		
<b>Windows 2012 (only)</b>	11557	Program names were not displayed in the UAC dialogs displayed to the user (Windows 2012 with User Account Control enabled)		

## Known Issues in this Release

Below is a list of the only known issues in the DocuPhase 6.4 Platform.

AREA/COMPONENT/ ELEMENT	REF #	ISSUE/REQUEST/REQUIREMENT	WORKAROUND
ScanDox ► Hot Folder	21283	Index Values do not clear from the ScanDox Index Control after a document from a Hot Folder is submitted to DocuPhase.	Click  (Clear Fields) to clear any remaining values.
ScanDox/Revision Control/WIV	31231/ 31232	The Send-to-ScanDox icon (  ) may not appear in the HTML5 Viewer, if both of the following events occur: <ul style="list-style-type: none"> <li>• A document has been sent to ScanDox, then...</li> <li>• ScanDox is closed before the document is sent back to DocuPhase</li> </ul>	Navigating away from the currently displayed document, or refreshing the page, forces the icon (  ) to re-appear.
Send-to-ScanDox from Office Add-ins	21209	Application (non-sticky) Index values do not clear after a document is submitted via Send-to-ScanDox.	Launch ScanDox prior to using the Office Add-ins Send-to-ScanDox feature. <b>OR</b> Click "Clear Fields" to remove the sticky items
SSO	29923	When setting up DocuPhase to use SSO, the DocuPhase site only uses Windows Authentication. This disables Anonymous and Forms authentications: preventing DocuPhase Service from calling on the subdirectory DocuPhase/Web/Services: causing a 401 error.	See Appendix on page 14 of this document for Workaround instructions.

## Appendix – Workaround for SSO Windows Authentication

When setting up DocuPhase to use SSO, the DocuPhase site is *only using Windows Authentication* (see [Item 29923](#) on page 13 of this document).

*Anonymous and Forms authentications* are disabled: preventing DocuPhase Service from calling on the subdirectory DocuPhase/Web/Services: causing a 401 error.

**❗ IMPORTANT!**

The procedure described below is only necessary **AFTER** enabling SSO using the DocuPhase SSO Configuration Guide found at the following location:

[https://help.docuphase.com/6.3/Content/Resources/PDFs/Config\\_Installation\\_Guides/DP-SSO\\_Configuration\\_Documentation20180709\\_5.1-6.2.pdf](https://help.docuphase.com/6.3/Content/Resources/PDFs/Config_Installation_Guides/DP-SSO_Configuration_Documentation20180709_5.1-6.2.pdf)

The workaround for this issue is to configuring the DocuPhase server IIS app pool to accept the DocuPhase windows service login attempts for HTML5 cache clearing, as shown below.

**Under the DocuPhase Server name in IIS Manager:**

- 1) Go to Sites ► Default Web Site ► DocuPhase ► Web ► Services.

**In the Services window:**

- 2) Double-click Authentication to display corresponding settings.
- 3) Make sure that the Anonymous Authentication is Enabled, but all other Authentication settings are Disabled (as shown in image).

