DOCUPHASE

Release Notes
DocuPhase, Version 6.2
Build: 6.2.0.637
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IMPORTANT TO KNOW

The purpose of this document is to provide information regarding the DocuPhase Platform upgrade to DocuPhase version 6.2. With the current upgrade, there are some items that are important for users to know:

> **IMPORTANT!**
> ❖ *Vendors and Clients are responsible for reading all Release Notes published or posted with an 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 (for example: if you are upgrading from 5.1 to 6.2, it is important to read the Release Notes for version 6.0 and 6.1).*

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

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 6.2 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

Enhancements and New Features

ENHANCEMENT/FEATURE	DESCRIPTION
Faster Progression Entry	Improvements in Progression have resulted in the reduction of Entry Time: decreasing processing time between entering a document into the system and the initiation of the first user task (or Bot-assigned task).
Improved Viewer Functionality	Enhancements to the HTML5 Viewer allow for better file management: adding support for additional file types, and streamlining download of non-native (unsupported) file types.
iLink Updates	Developments have effected a reduction in iLink CPU usage, along with more consistent screen reads: resulting in improved search results.
Work Item Forms Integration	Adding "Left Side Forms" capability to the DocuPhase platform makes it possible to open/view a form and document at the same time: eliminating the need to flip back and forth between the two.
GDIS – Google Directory Integration Service	This features has been added to allow Google and DocuPhase to work together: synchronizing Google users and groups with DocuPhase users and groups..

Analytics

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
28918	Reports	Errors displayed when attempting to load a DocumentCount or PageCount report.	Verified and Resolved

The HTML5 Viewer

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
25230	Viewer Printing ( )	In some cases, printing from IE (Windows server 8 R2, IE11)or Chrome browsers caused an error rather than opening a new window with PDF displayed.	Verified and Resolved
28415		An error sometimes occurred when trying to print certain page ranges of a multi-page PDF document.	
26045	Send to ScanDox ( )	In the HTML5 Viewer, after rotating a page in a Revision Controlled document, then sending it to ScanDox, any page rotation within ScanDox was not always reflected in the HTML5 Viewer.	
26199		Unexpected errors occurred when attempting to submit document when using Send to ScanDox.	
22772		An error was logged by UploadService when sending a document to ScanDox via an RDP session.	

The HTML5 Viewer (continued on next page)

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
The HTML5 Viewer (continued)			
24404	Annotations	Some of the Annotations that appeared in the legacy viewer (HWV) were difficult (too small) to see once converted and viewed in the HTML5 Viewer	Verified and Resolved
26347		Annotations added to a document in the HTML5 Viewer were not properly visible in the Legacy Viewer (HWV).	
26325		New Users without Annotation View permissions were still able to see Annotations.	
27443		Users were unable to check in large PDF documents after adding Annotations.	
29089		When the Highlight Annotation icon (🖊) was selected, there was no visual cue on the screen to show that Highlight was in use (🖊).	
29090		Once selected, the Rubber Stamp icon (👤) appeared to be active even when other Annotation Tools were selected.	
27669	Multipage TIF Documents	Users were unable to save more than one page of a multipage TIF document	
28417	Revision Control	The Check-in icon (🔄) remained in active status even after documents "edited in place", were checked-in with Revision Control enabled (but Tracking disabled),.	
26663	Password Protection /Email	Password protected PDF documents received through email were not requiring the recipient to enter a password before viewing the document.	
29405, 29406	Unsupported File Formats	Users were unable to download (💾), email, and/or use Revision Control for if the document was of an unsupported file format.	Verified and Resolved Documents of unsupported formats CAN be downloaded, emailed, and/or Revision Controlled.
27976	IE	When using IE, an error appeared when viewing documents in quick succession.	Verified and Resolved
28693	Email	When attempting to email (✉) a document from within the Viewer, an "Invalid" error appeared after the email password was entered.	
29209	Viewer Navigation	Using the "more commands" icons (◀/▶) resulted in the display scrolling in the wrong direction.	
29556		Paging through a document after a token expired caused the system to apparently "freeze" with the original document displayed, a continually spinning wheel, and a message reading that the server connection was being re-established.	Verified and Resolved After displaying the "Re-establishing...." message, the viewer displays the first document from the newly selected screen page.
N/A	Zoom	An issue was discovered that caused the "view mode" to be activated for the "actual size" mode.	Verified and Resolved

DocuPhase, FullText, REST Services

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
23818	Date Indexes	For non-US Clients, custom and system "Region and Language" date format (dd/mm/yyyy) index rules were not obeyed.	Verified and Resolved
28946	Applications	An error was displayed upon giving a user access to two or more Applications.	
29252	Search	Once a search was performed using a UDL as the criteria, using Edit Last Query did not allow the User to reset the UDL to "-choose-": resulting in the UDL still being included in search criteria used by the designated query in the future (i.e., setting a UDL to the "choose" option excludes it as part of the search criteria).	

Forms

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
25390	Drop-down Boxes	The numpad keypad did not work for drop down / combo box fields.	Verified and Resolved after third-party update
29212	PDF Connect	After its initial submission, changes to a form were not mapped and updated in the associated PDF unless Revision Control and Tracking are both enabled.	Verified and Resolved

iLink

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
28379	Application Link/HotKey	Neither Application Links nor Hotkeys set up to launch ScanDox were working, but instead displaying an "unexpected error".	Verified and Resolved Upon an expired session, a message is displayed to let the user know that the session has expired, and restarting Scan Dox is required.

Progression, Advanced Work Queue, Workflow

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
25998	Progression Studio	When adding a User to a User Task, the Assignment Rule Condition was removed.	Verified and Resolved All conditions are maintained.
29283		When editing/creating a rule for Wait Tasks for documents, only one document could be selected.	Verified and Resolved Multiple documents can be selected.
29211	Progression Studio/ AWQ	In the AWQ, "Fields Display" option updates in Progression Studio were not showing up in the browser until after the browser was cached.	Verified and Resolved
27303	Assignment Evaluation	When trying to reprocess the items, some items were not evaluated properly: resulting in an endless looping and the addition of repeated entries being added to the TaskNotes for any items that _do_ get processed.	
25724	Deactivated Users	Deactivated users in groups were still assigned to work items and included in email notifications.	
25412	AWQ/Advanced Search	The use of special characters (e.g., single quotes) in the FullName field caused Users to be logged out automatically when attempting to use Advanced Search.	
27662	AWQ	When a primary document was removed (soft deleted), work items were then erroneously listed as missing.	
28543		A Work Item previously belonging to two active process, were still showing under both in Search results, even if one of those processes was de-implemented.	
29561	Work Item Viewer	Users who viewed at least one document from a Binder containing multiple documents, were unable to view other documents in that Binder if the token expired.	
28427		Portions of the calendar were being obscured by the UDL.	
29096	Process Entry Point	When a primary document did not exist in a Binder, a secondary document that satisfied the Entry Point conditions, was triggering the process: going straight to the exception task.	Verified and Resolved The User can continue to view documents in a multi-document Binder even when the token has expired.

ScanDox

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
25581	User Sessions	An expired token (session) was preventing ScanDox from opening and causing it to loop indefinitely.	Verified and Resolved Upon an expired session, a message is displayed to let the user know that the session has expired, and restarting Scan Dox is required.
24544	Send to ScanDox ( )/ SaaS	ScanDox via SaaS was allowing one document to be open simultaneously at two separate workstations, by two different users.	Verified and Resolved
26362	SSL	Send to ScanDox using SSL (Secure Sockets Layer) was not loading documents, but displaying a Loading Error instead.	
28403	Send to ScanDox ( )/ Resubmission to DocuPhase	Documents sent to ScanDox could not be resubmitted to DocuPhase with or without edits: the document was left in the ScanDox workspace	

Single Sign-On

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
N/A	Windows Authentication (NTLM) Configuration	In order to prevent caching issues, when configuring Windows Authentication (NTLM) you need to make specific settings for Anonymous, Forms, and Windows Authentication.	For more information about configuration of Windows Authentication (NTLM), please refer to pages 18 and 19 of the Single Sign-on Configuration Guide.

xTractor

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
28379	OCR	xTractor was unable to read Tiff files or use any other engine to OCR PDF files.	Verified and Resolved TIFFS now process successfully and each engine model can be used.

KNOWN ISSUES IN THIS RELEASE

Below is a list of the only known issues in the DocuPhase 6.2.0.637 Platform.

REFERENCE NUMBER	AREA/COMPONENT/ ELEMENT	ISSUE/REQUEST/REQUIREMENT	WORKAROUND
29923	SSO	When setting up DocuPhase to use SSO, DocuPhase site is only using Windows Authentication. Anonymous and Forms authentications are disabled: preventing DocuPhase Service from calling on the subdirectory DocuPhase/Web/Services and causing a 401 error.	• *Enhancement to this functionality is planned for a future release.* • *For information about using the current version, please refer to the DocuPhase Single Sign-On (SSO)Configuration Guide.*
21209	Send to ScanDox from Office Add-ins	Application (non-sticky) Index values are not clearing after submitting a document via Send to ScanDox.	*Launch ScanDox prior to using the Office Add-ins Send to ScanDox feature.*
21283	Hot Folder▶ScanDox	Index Values are not clearing from the ScanDox Index Control after a document from a HotFolder is submitted to DocuPhase.	*Click* *(Clear Fields) to clear the remaining values.*