

TABLE OF CONTENTS

Important to Know	1
Questions?	1
Items Included in this Release	2
Enhancements and New Features.....	2
ScanDox	2
DocuPhase Installer (Single Installer)	3
The HTML5 Viewer	3
Progression, Workflow, Classic and Advanced Work Queues	3
Forms	3
Known Issues in this Release	4
Workaround for Item 29923 – Known Issue Causing 401 Error on SSO Authentication.....	5

IMPORTANT TO KNOW

The purpose of this document is to provide information regarding the DocuPhase Platform upgrade to DocuPhase version 6.3. 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 6.3 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
Redesigned Work Item Viewer	<p>The Work Item Viewer has been redesigned (including a refined user interface) and optimized: significantly improving performance over the previous versions. As a result, this provides the following:</p> <ul style="list-style-type: none"> • Page loading time has been enhanced by 2 to 5 times as fast as the previous version. • REST API was expanded to cover Workflow Data Retrieval and Actions: providing enhanced capabilities for use within internal system integrations. • Modular page supports customization of components and independent loading for faster response times. • Inline editing capabilities: eliminating page navigation for altering index information on binder documents. • Notes are easier than ever to add. • Workflow history can now be filtered: allowing users to quickly view the critical information for which they are looking. • Queue navigation now displays the number of completed items.
Advanced Queue Enhancements	The layout now makes navigation easier for users with a small number of items in their Queues.
Enhanced Security of Progression Engine Console	Users must have the 'Update System Options' permission in order to make changes here.
All New Online Help System	The new help has been re-created to be more user friendly, provide information specific to the DocuPhase screen being displayed, and allows you to search the entire Help System – all from the same Help window residing within the DocuPhase platform.



REFERENCE NUMBER	AREA/COMPONENT/ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
25559	Hot Folder via Upload Manager	Sometimes files from the Hot Folder were not processed.	Resolved and verified
30856 (28803)	Login Dialog Box	An exception was logged, and error displayed when cancelling the Login Dialog box after launch.	

DocuPhase Installer (Single Installer)

REFERENCE NUMBER	AREA/COMPONENT/ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
30189	Database Passwords	Previously, users were unable to use certain special characters (i.e., ; or space) when creating a password for database creation.	Resolved and verified Special characters (i.e., ; or space) can now be included in passwords.
30474	Minor Build Upgrades	There were issues when upgrading from an existing build to a minor build.	Resolved and verified

The HTML5 Viewer

REFERENCE NUMBER	AREA/COMPONENT/ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
26347	Annotations	Annotations added to a document in the HTML5 Viewer were not properly visible in the Legacy Viewer (HWV).	Resolved and verified
32392	Document Loading	JIT error prevented loading of specific documents with message file attachments).	

Progression, Workflow, Classic and Advanced Work Queues




REFERENCE NUMBER	AREA/COMPONENT/ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
N/A	Return to Workflow	As of release 6.3, Progression Exception Task types require at least one task step to be defined in order for the Return to Flow action button to be available in the Work Item Viewer.	Product Management (SLincoln)
30040	Classic Queue	After performing a search, then reassigning Work, the User drop-down was sometimes empty	Resolved and verified

Forms

REFERENCE NUMBER	AREA/COMPONENT/ELEMENT	ISSUE/REQUEST/REQUIREMENT	STATUS/NOTE
30204	Forms Link Control	Link Control did not properly redirect to PDF links	Resolved and verified
31228		Links on Forms that launch Viewer/Search API were not functioning in HVW Viewer with IE11	

KNOWN ISSUES IN THIS RELEASE

Below is a list of the only known issues in the DocuPhase 6.3.0???. Platform.

REFERENCE NUMBER	AREA/COMPONENT/ELEMENT	ISSUE/REQUEST/REQUIREMENT	WORKAROUND
21209	Send to ScanDox from Office Add-ins	Application (non-sticky) Index values are not clearing after submitting a document via Send to ScanDox.	<i>Launch ScanDox prior to using the Office Add-ins Send to ScanDox feature.</i>
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.
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.	<i>See Appendix on page 5 of this document for Workaround instructions.</i>
31231/31232	ScanDox/Revision Control/WIV	Once a document has been sent to ScanDox, if a ScanDox is closed before the document is sent back to DocuPhase, the Send To ScanDox icon () may not appear in the HTML5 Viewer.	<i>Navigating away from the currently displayed document, or refreshing the page, forces the icon () to re-appear.</i>

APPENDIX

Workaround for Item 29923 – Known Issue Causing 401 Error on SSO Authentication

IMPORTANT!
The procedure described below is only necessary **AFTER** enabling SSO using the DocuPhase SSO Configuration Guide.

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).

Name	Status	Response Type
Anonymous Authentication	Enabled	
ASP.NET Impersonation	Disabled	
Basic Authentication	Disabled	HTTP 401 Challenge
Digest Authentication	Disabled	HTTP 401 Challenge
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Disabled	HTTP 401 Challenge