

Autoform DM 10.1.

Release Notes

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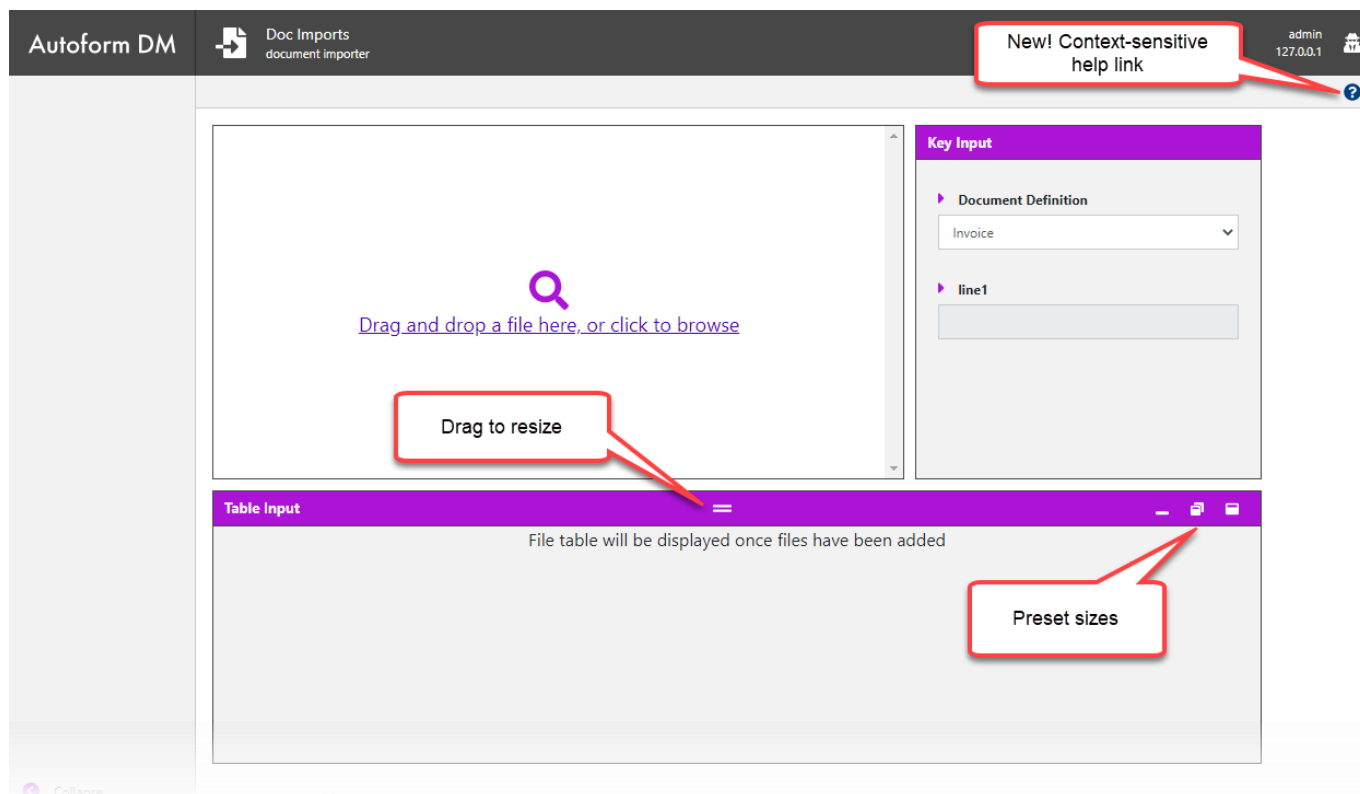
Autoform DM 10.1 New Features.

Web Document Import – Batch Support

Batch support means you can now add multiple documents of the same document definition, adding flexible import and advanced indexing for bulk workflows.

Building on the foundation of Web Document Import in Autoform DM 10.0, this iteration enables you to import multiple documents of a chosen document definition.

The main change to the GUI is the addition of a new Table Input pane. This lists all of the imported documents in rows, with metadata arranged into columns. You can edit applicable values directly in the table, or in the Key Input pane as before. The table pane can be resized as preferred, or to preset positions.



These features further our goal to permanently move away from thick-client solutions, migrating customers to our hassle-free web front-end. As always, integration will remain at the heart of our implementation, ensuring the new functionality is available from your core systems.

Key Benefits

- Easily categorise, index and archive batches of documents
- Directly accessible from your third-party applications
- Replaces thick-client app installs for common use-cases

Cloud Deployment Automation

A streamlined deployment pipeline into our cloud platform for the automation of new deployments and upgrades.

Streamlining the release pipeline between product and cloud services, our docker images will be published for production use by the cloud services team. New deployments and existing upgrades of Autoform DM will be optimised, reducing deployment effort from days to minutes.

Docker Image

We will now distribute a docker image to the Azure Container Registry which the Cloud Team can use to run Autoform DM in Kubernetes. This enables multi-tenancy, as multiple customers systems can be run on the same VMs while ensuring complete isolation to avoid compromising on security. This greatly reduces the costs per customer.

The docker image, and our example Kubernetes definitions, allows the configuration of SQL Server and Blob Storage (document files) to be injected securely using Azure Key Vault.

Finally we have implemented Application Insights integration which provides consolidated log capture and metrics gathering. Application Insights has powerful log querying and alerting capabilities which we can now leverage.

Key Benefits

- Automated deployment of new instances
- Simpler upgrade workflow

Secure-by-Default

Standardising our security policy approach ensures a secure and confident public-facing cloud solution, avoiding the need for VPNs.

Our 'secure-by-default' initiative ensures we put focus on security as part of every release. Our end goal is a product that is not only secure, but secure-by-default, straight out-of-the-box with minimal configuration required. For this release, we are including several notable security enhancements.

Secure Defaults for Auditing

Autoform DM is now shipped with the following set of default audit events already turned on. In summary, everything that is related to Logins, Users, Groups and Settings, including document deletion:

Login	User Created	Server Setting Updated	File Deleted
Logout	User Updated	Password Setting Updated	Document Search Executed
Login Failed	User Disabled	Email Setting Updated	SQL Application Executed
Group Created	User Password Reset	LDAP Setting Updated	
Group Updated	User Changed Password	Document Deleted	
Group Deleted	User Changed Own Password	Document Accessed	

Penetration Testing

This version of Autoform DM has been subjected to penetration testing by an external company. The report found the software to be very secure, which is great news because it means your sensitive data is secured against hacker attacks.

Client Compatibility

In order to support the latest TLS protocols in the client, we have also delivered a client release.

⚠ Important: Autoform DM 10.1 is not compatible with earlier versions of the client. It will only work with the new 10.1.1 and future versions. Before upgrading, ensure compatibility.

Do not upgrade to Autoform DM 10.1 immediately if you are using earlier versions of the client with critical live applications.

Note: The new DM client 10.1.1 is compatible with earlier versions of Autoform DM. We recommend first upgrading the client framework before upgrading to Autoform DM 10.1.

The client 10.1.1 installer is hosted in DM server.

		Autoform DM (server) version	
		<10.0	>10.1
Client	10.1.0 or earlier	●	○
	10.1.1[1]	○	●

1. Assumes modern windows version using TLS 2.0+

HTTP/ HTTPS Switching Tool

When installing Autoform DM, HTTPS support is now enabled by default and the ability to provide custom HTTPS certificates for the server to use is provided.

This ensures HTTPS support is ready out-of-the-box to help increase security and reduce configuration overhead.

However, HTTP connectivity is also enabled, so an installation can be used over both HTTP and HTTPS once completed. This allows the application to be tested using either protocol and to facilitate the upgrade of legacy integrations that are still using HTTP, if present.

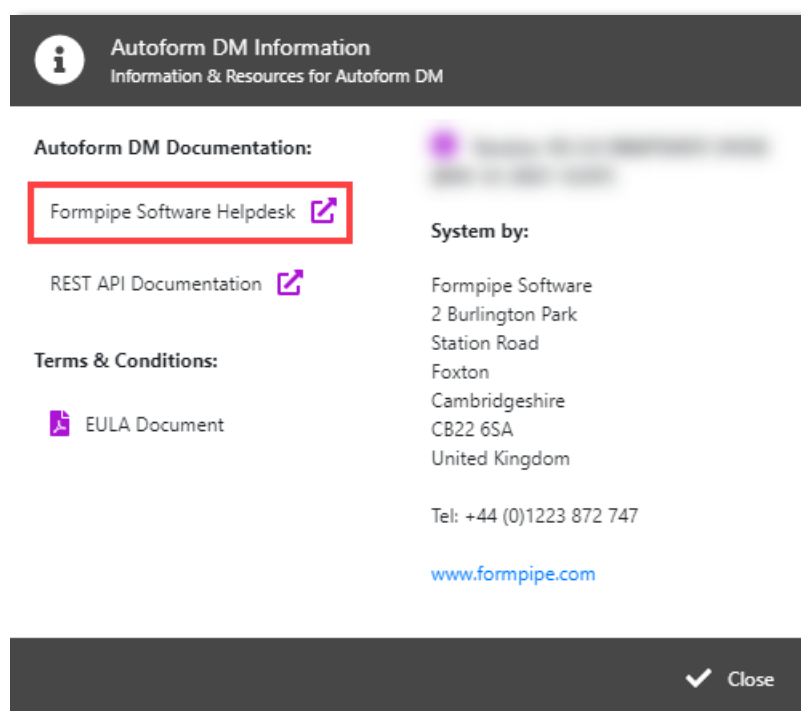
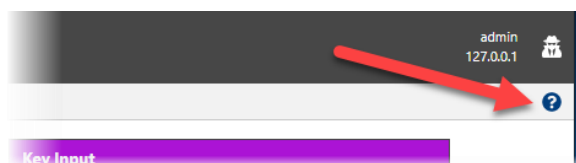
Key Benefits

- HTTPS-only as default
- Standardised TLS defaults
- Verified security


Documentation Improvements

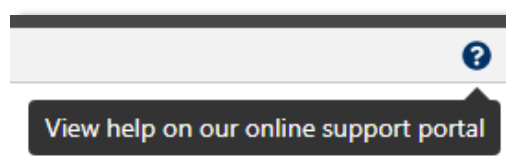
New Help Pages Added to Guide

We have published more pages in the [Autoform DM User Guide](#) with this release, and will continue to improve and add content. It is easier than ever to get the help you need when using Autoform DM, with links now available through the information pop-up and context-sensitive help links.



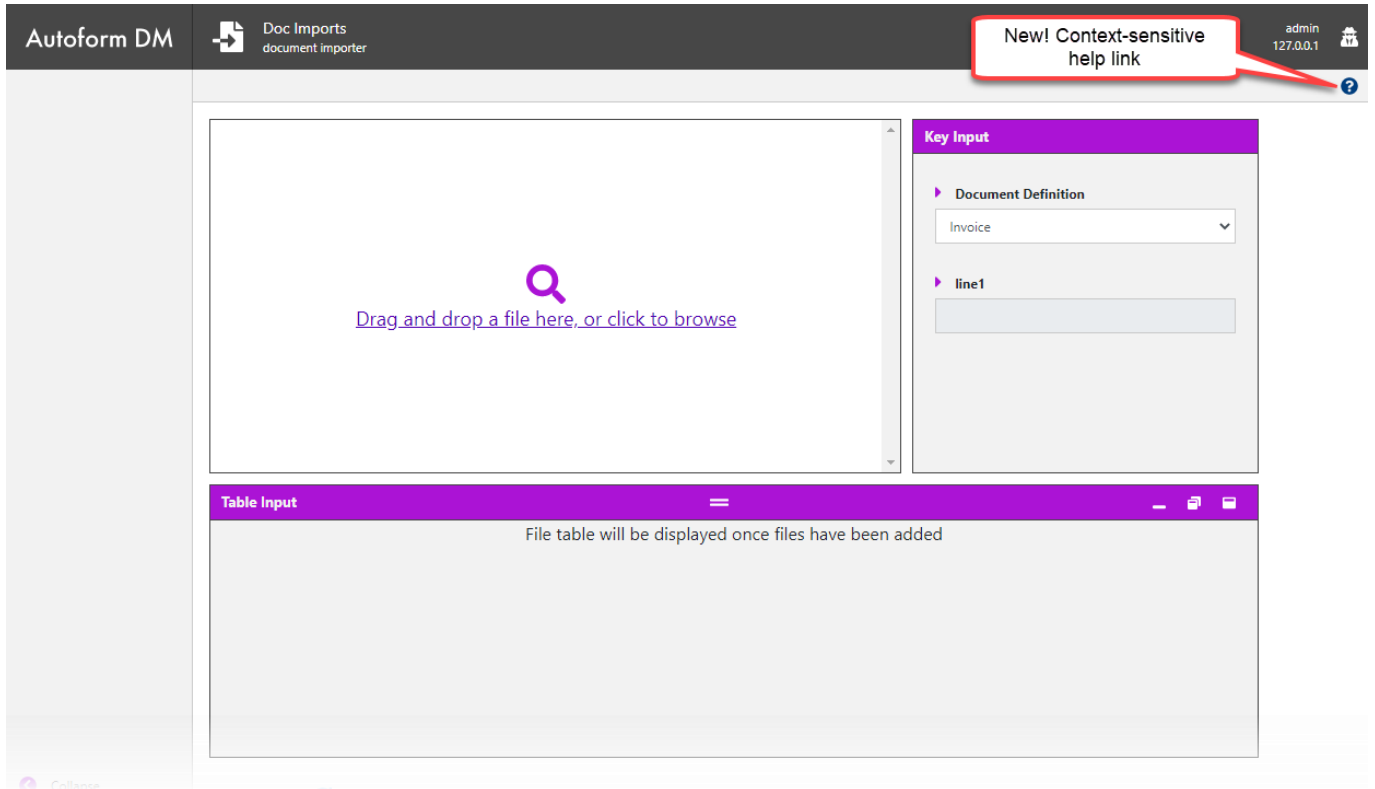
Context-Sensitive Help Links

New context-sensitive help links are being added to the DM interface to show the Formpipe support portal guide page that you need. Click the  icon in the top-right.



In this release, we started with the Document Import screens. There are links to the relevant help page for each administration tab for existing configurations. The API keys pages now have their own links too. We

welcome your feedback on this approach to documentation and plan to continue rolling it out over future releases.



The screenshot displays the Autoform DM interface. The top header includes the text "Autoform DM" and "Doc Imports document importer". On the right side of the header, there is a user profile for "admin" with the version "127.0.0.1" and a help icon. A red callout box points to the help icon with the text "New! Context-sensitive help link".

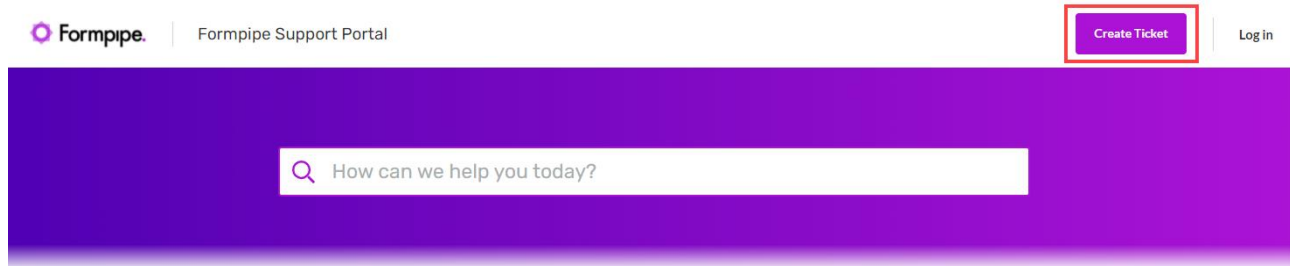
The main content area is divided into two sections. The upper section is a large white box with a magnifying glass icon and the text "Drag and drop a file here, or click to browse". To the right of this box is a "Key Input" panel with a purple header. It contains two sections: "Document Definition" with a dropdown menu showing "Invoice", and "line1" with a text input field.

The lower section is a "Table Input" panel with a purple header. It contains the text "File table will be displayed once files have been added".

Maintenance Report.

The following fixes and enhancements are included with this version of Autoform DM.

If you encounter difficulty while using Autoform DM, please contact us via the **Create Ticket** button in the support portal.



Internal Ref.	External Ref.	Details	Area	Status
PDM-10826	-	Clicking a checkbox twice hid the document definition dropdown	Document Import	Fixed
PDM-10834	-	Third-party integration did not set values correctly	Document Import	Fixed
PDM-10907	-	Including commas within a dropdown option and then navigating away and back caused the dropdown options to multiply suddenly	Document Import	Fixed
PDM-11122	-	Invalid date key values could be set	Document Import	Fixed
PDM-11154	-	Updating user roles through the front-end did not generate an audit	Secure-by-Default	Fixed