Autoform DM 10.3.

Release Notes

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Revision 1
2023-03-07

Formpipe.

Contents.

Autoform DM 10.3 New Features.

Document Retention Policy

This release represents a step change in document retention, with the ability to set policies that govern when a document will be automatically deleted from the archive from within Autoform DM.

The new front-end administration module, Document Retention Manager, has been added to the Managers group on the Administration screen.

The new functionality facilitates the management of documents, particularly those subject to retention periods as part of regulatory requirements.

This supersedes the associated BPM functionality.

You can schedule a retention period, attached to a document definition date key.

Choose from one of the following options:

- Define a maximum age in days, using the document created date as the starting date.
- Identify a date key to associate with the document definition which will contain the expiry date of the document.

Key Benefits

- Facilitates compliance with regulatory requirements

- Reduces storage / Azure costs by deleting documents that are not needed

- Audit logs for policy changes and report views

Document Import – Update Documents and CUK Match

This release includes updates to the document import UI and behaviour.

Customer Unique Key (CUK)

When uploading a new document, the Customer Unique Key (CUK) – simply a unique document reference of your choosing – will be checked against existing documents to see whether the CUK matches that of an archived document.
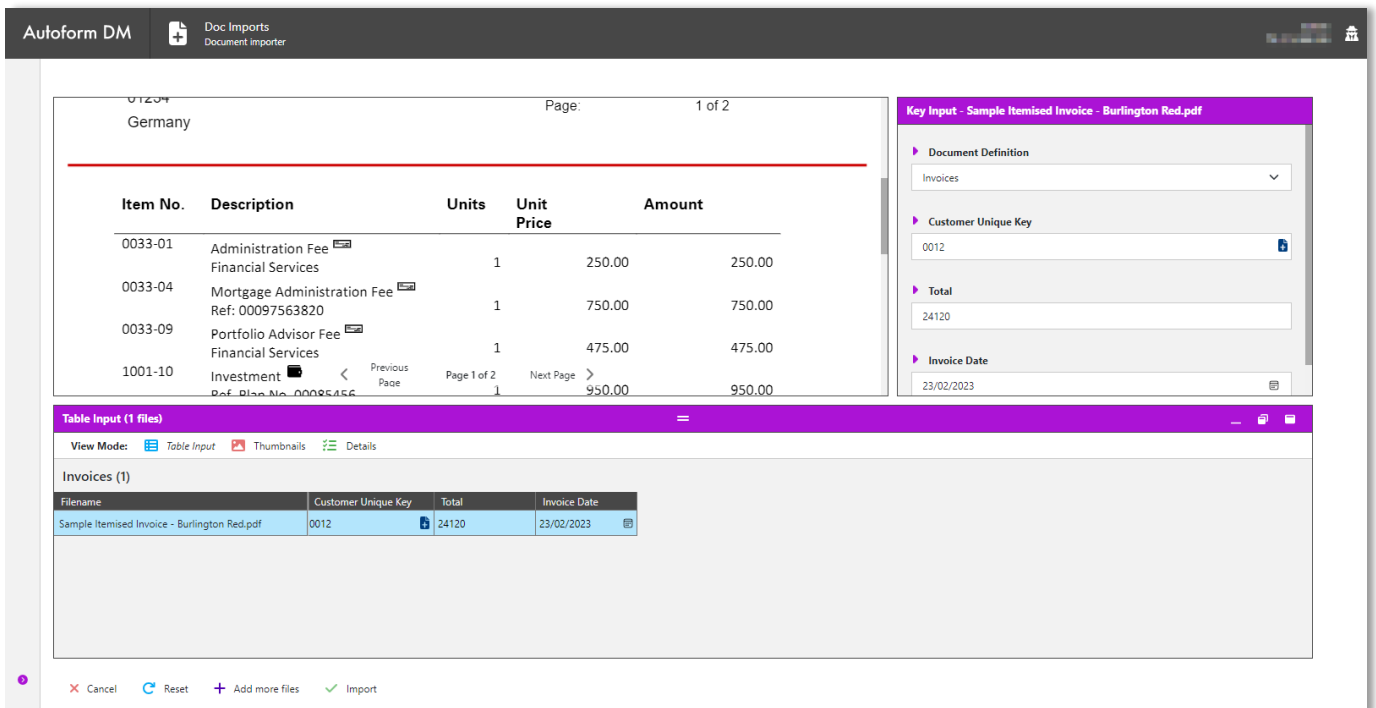
If there is a match, an icon will indicate this and the fields will be pre-populated with seed data.

Importing will overwrite the latest version of the existing file with the latest inputs. This will also overwrite the metadata. Document history remains available for auditing.

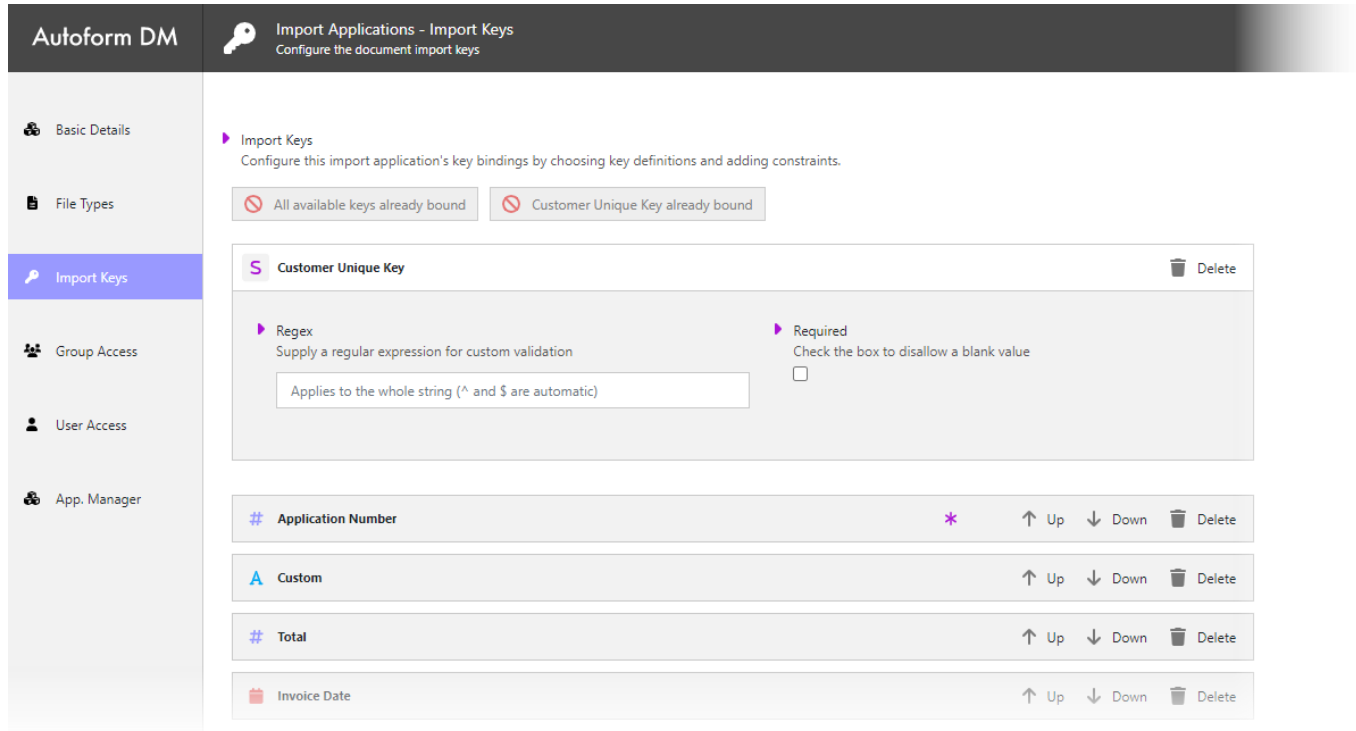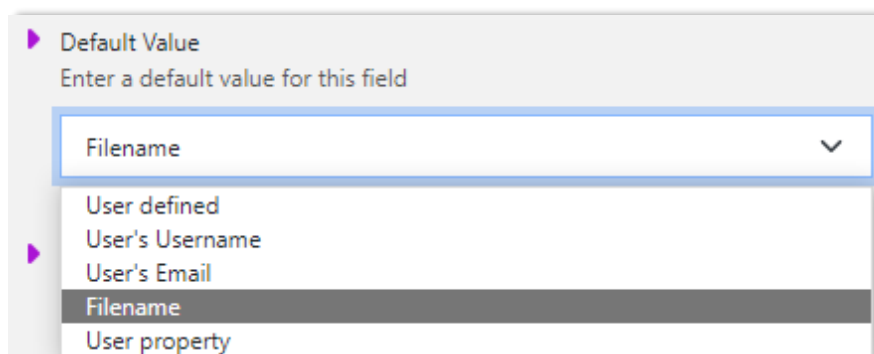If there is no match, a new document will be created.

CUK is now shown as a separate field when importing in the Key Input pane.

Default Value

This option existed in the previous iteration but there are now more options:

- Now/Today
- User's Username
- E-mail
- User Properties (Extended Properties)

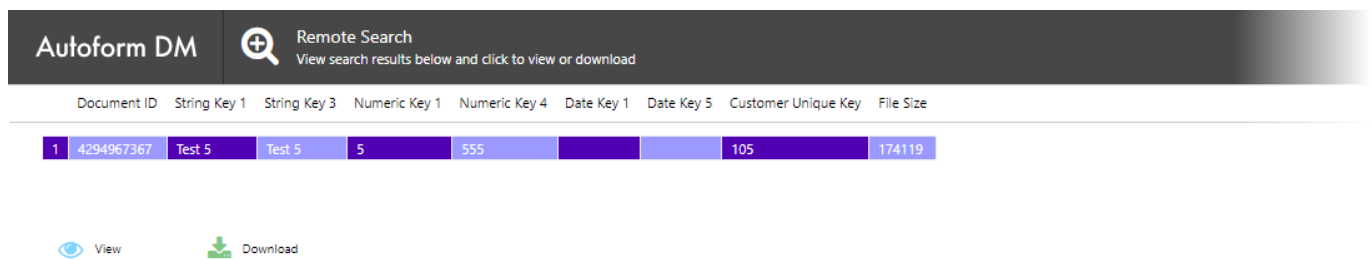

Note: Extended properties must have been defined elsewhere for them to be an option in the drop-down menu.

Remote Search Behaviour Change

The results table will now be shown by default, even if there is only one record.

The previous behaviour when there was one record was to show the file.

Note: It is possible to revert to the previous behaviour, if preferred. See Remote Search.
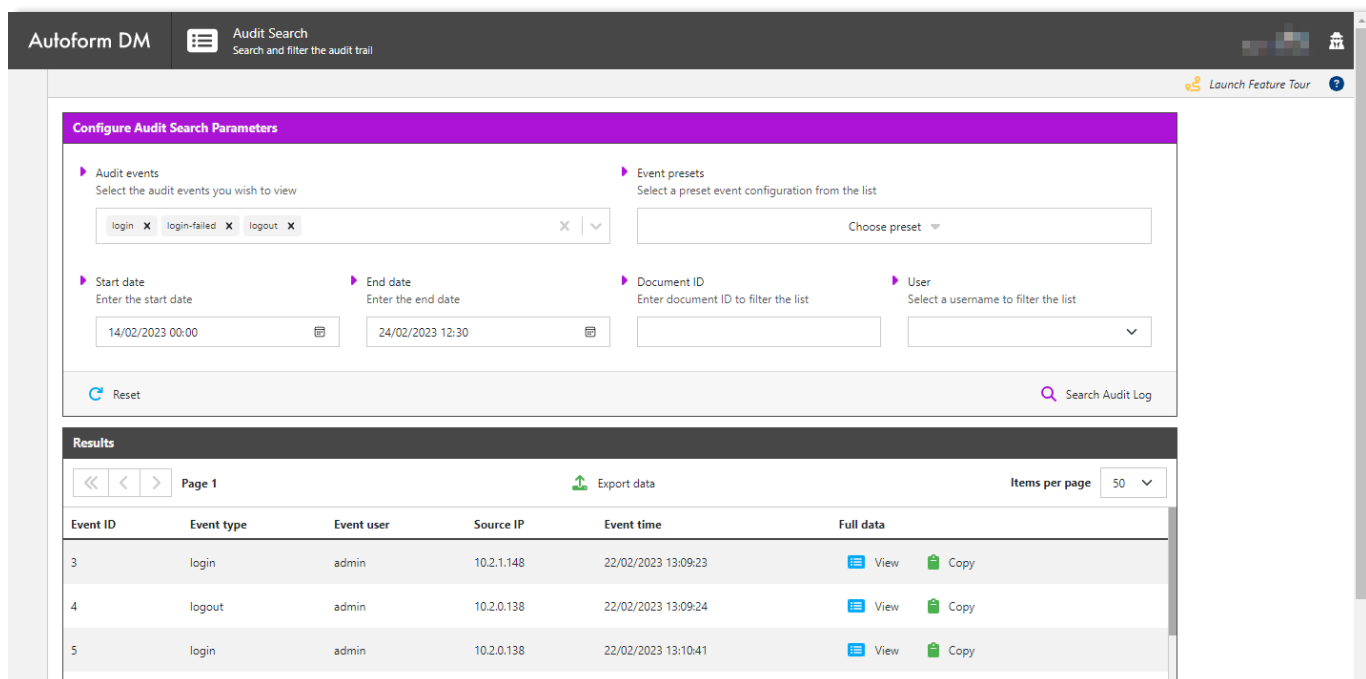
Secure By Default – View Audits

This release adds a new front-end administration module, called View Audits, for searching and viewing audit logs.

Search efficiently by preset audit log types, including document event history and user login history. Define the audit types and filter by date, Document ID and User.

You can view data individually and export to a CSV file, if required.

Key Benefits

• Efficiently search and filter relevant results

• Presets included

• Export data to a CSV file

Miscellaneous Improvements

QA Focus

Behind the scenes, we have been working to update and expand our integration tests and automatically build the software after every change.

The result? More automated test coverage, freeing up our testing team for in-depth analysis to ensure we provide stable and reliable software with even fewer bugs.

Support Portal Documentation

We are continuing to roll out new useful Article and Guide content that helps you use Autoform DM. We will continue to do this, and update content, to ensure your experience using our software is easy and enjoyable.

These pages have been added:

- Flag Usage
- Remote Search
- Document Retention Manager
- View Audits
- Document Imports 10.3 (Chapter)

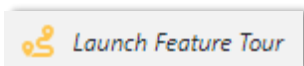## Feature Tours

The helpful Feature Tour is included in this release to help get you quickly up to speed with the new features included with Autoform DM 10.3.

These features are covered:

- Web Document Import and CUK matching
- View Audits

Just click the **Launch Feature Tour** button to begin the on-screen help.

You can toggle the Feature Tour on or off at any time by clicking the button.

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.
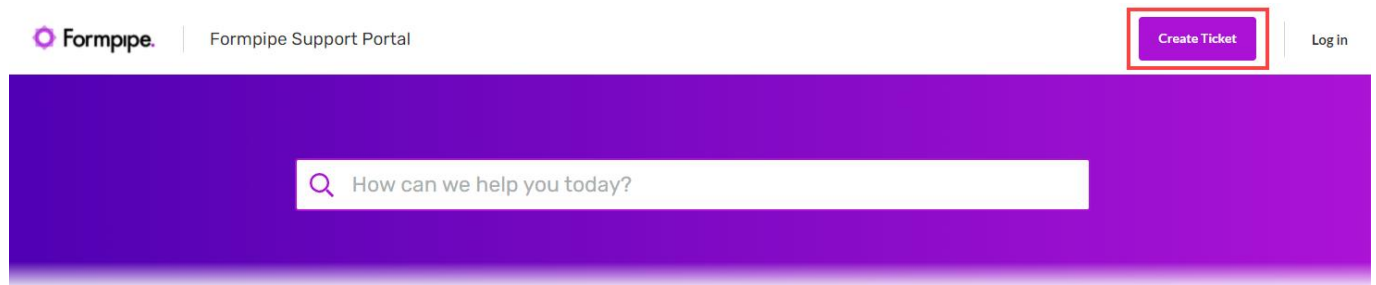
Internal Ref.	External Ref.	Details	Area	Status
PDM-11483	-	Limiting maximum sessions was not working as intended	DM Server	Fixed
PDM-11695	-	Creating a default document import added keys in reverse order	Document Import	Fixed
PDM-11673	-	Updating application users did not write audit logs	Auditing	Fixed
PDM-11578	-	Long key labels overlapped across columns in Key Definition Page	UI	Fixed
PDM-11610	-	Some Line Item keys were incorrectly handled	UI	Fixed
PDM-11581	-	Cluster installer colours were incorrectly displayed	Installer	Fixed
PDM-6630	-	Creating a default search added keys in reverse order	Search	Fixed
PDM-11609	-	Remote search did not throw error for users with no access	Remote Search	Fixed
PDM-10799	-	NotSerializableException was thrown when cloning a user with the SQL application	User Manager	Fixed