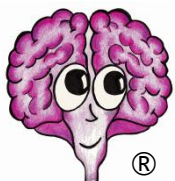


DocuBrain® TechDoc Release Notes



A DocuBrain® Product

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By Prevo Technologies, Inc.

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DocuBrain® TechDoc 9 Release Notes

These release notes document the changes from TechDoc 8 to TechDoc 9.

Problems Resolved

DM-589: Fixed Messages in the tdvmctrl Utility

A typo in one of the VMware messages was fixed. Also, a couple of newer Hyper-V VM states from Version 2 were missing. For example, when a Render VM was in a certain saved condition, the status command would output "Success: Unknown state 6" when it should have said "Success: Saved".

DM-594: Update PDF Toolbox to Latest Version

The PDF Toolbox library has been updated to the latest version to resolve multiple issues with processing of PDF files. An issue was resolved that prevented text extraction from certain PDF files that used a font factor setting other than 1. A decoder problem could cause a hang while extracting text. Also, a thumbnail problem was fixed when an embedded image in the PDF file used a CCITT or JBig2 encoder and had additional filters applied to the image data.

DM-597: Mass Cancelled Document Not Updated in SM

Under certain conditions, Mass Cancel Documents would not automatically trigger updates to any associated SM's. This issue has been resolved.

DM-598: Cannot Run Reports on the Attachments Table

A late change in TechDoc 8 to attachments broke reports on the Attachments table and it was not caught before TechDoc 8 shipped. The problem has been addressed and Attachment reports now work.

DM-603: Update SOAP Security Handler to Properly Handle Log-In Failures

While updating the SOAP regression tester, an issue was identified where certain log-in failures generated exceptions at an inappropriate time which prevented properly formed SOAP exceptions from being returned. This has been fixed so that SOAP clients can receive all reasons for log-in failures properly now.

DM-608: Workflow Process with Start Form Does Not Have Current User Assigned

Workflow processes that begin with a start form did not have a current user assigned. These processes go through a different initialization flow that did

not invoke the TechDoc workflow process initialization. This has been corrected so that these processes will also have a current user assigned to them.

DM-610: Fix Link Description on Compose Email for Generation

The link description for the "include rendered generation" link in Compose Email described it as a released generation which is incorrect and it has been fixed.

DM-614: My Projects Needs to Show Projects a User Has Owner Access to

If a project was created and a non-admin user is given access to the project, that user cannot see that project listed under My Projects because they don't actually own the project. Show Projects has been updated so that a non-admin user can see these types of projects too.

DM-615: When a Non-Admin User Modifies a Project They Don't Own, They Become the Owner of It

If a Project is created and a non-admin user is given modify access to it, if that user modifies the project they become the owner of it. This has been corrected so the owner cannot be changed unless the requester is an admin.

DM-616: Compose Email for Project Creates Email Link with Incorrect Text

If you composed an email on a project containing some documents and choose to add the links "Include Fetch Latest Revision link for each Document in the Project", the links were placed into the email saying "To fetch latest generation...". This has been corrected to say "To fetch latest revision..."

DM-618: Compose Email Recipient Popup Appears Blank for Some Users

It was reported that the Recipient Popup on the Compose Email servlet appeared blank in some cases. The problem turned out to be two fold. First, a large number of users or groups and/or a slow network could cause the AJAX response to take too long to arrive. The JavaScript was updated to support very slow responses. Second, special characters in the group description could cause a problem with the JSON data that was being transmitted. A new JSON encoder was employed that fully encodes any string value properly in JSON responses.

DM-620: Default Document Access on a Folder Does Not Allow Remote User Groups for Read Access

Associate Default Document Access on a Folder has been updated to allow Remote User Groups to be associated for read access. Previously, Remote User Groups were not included in the list so that they could be chosen.

DM-626: Fix Potential XSS on Forms with DM Hidden Fields

Potential XSS issues were found with hidden fields on the DM. The names of hidden fields are now properly encoded to prevent any possible XSS injections.

DM-633: Rendering Can Be Attempted on a Document That Should No Longer Be Rendered

It was possible for the system to still attempt to render a document that no longer should be rendered. For example, if a document is scheduled to be rendered but before it is actually rendered, an Admin changed the corresponding Doc Type or Mime Type to not allow rendering, the document would still be rendered. A recheck has been added right before the document actually renders to ensure that it should still be rendered.

DM-636: Non-Admin User Cannot Modify a Document Owned by Someone Else Using REST

A problem has been corrected with the REST Modify Document command that prevented a non-Admin from modifying a document that they do not own. This mainly affected the TechDoc client. For a non-Admin user, the command incorrectly attempts to set the document owner to the current user, which fails if the document is not already owned by the current user.

This issue has always been present. No data in TechDoc has been incorrectly modified due to the problem. It only prevented non-Admin/non-document owner users from modifying documents from the TechDoc client even if they have Modify or Owner access to the document.

DM-653: Change Modify User to Prevent Duplicate System Groups Issues

A customer reported that a user's organization could not be changed in Modify User because the SQL database reported a duplicate entry when trying to move the user's group entry from one system org list to the other. Modify User has been changed to prevent this type of issue from occurring in the future.

DM-661: Running a Report as XML has encoding issues when using virtual columns

When a report is run as XML that contains virtual columns, illegal XML tags could be generated. This has been corrected.

SM-120: Cannot Search on Text Containing Forward Slashes

A problem was reported on TechDoc 8 where searching on a revision of N/A was returning an error. The problem turned out to be that the Lucene classic parser was changed to add regular expressions that are denoted with forward slashes. Unfortunately, TechDoc uses forward slashes in doc

number, titles, revisions, etc. Support was added for escaping forward slashes in search values so that Lucene does not detect them as invalid regular expressions.

SM-125: Fix Potential XSS on Forms with SM Hidden Fields

Potential XSS issues were found with hidden fields on the SM. The names of hidden fields are now properly encoded to prevent any possible XSS injections.

Changes, Improvements, and New Features

DM-98: Add Ability to See Currently Logged in Users

An Admin can now see user's currently logged into the DM. In addition, active sessions are tracked based on how they are interacting with the system. Currently, the three ways are REST sessions (users/applications interacting via the REST protocol, such as the TechDoc Client or Scan Agent), SOAP sessions (users/applications interacting via the SOAP protocol), and Web sessions (users/applications interacting via the HTTP/HTTPS protocol, typically users accessing TechDoc via a web browser).

DM-100: Log Users That Timeout

The DM now logs users that timeout due to inactivity. Previously, if a user closed their browser without logging out, there was no log or history record written of the timeout.

DM-144: Need Ability to Have Hyperlinked Columns in Document and Generation Reports

The ability has been added to reports for hyperlink columns for Documents and Generations. This is most useful in HTML reports to have hyperlinked document and gen numbers but it can still be helpful in CSV and XML reports to output the actual hyperlinks.

DM-188: Add Forms Support to TechDoc

Forms support has been added to TechDoc 9. The main Forms screen is a customizable dashboard like My Work now has. Forms are designed in XML and placed in TechDoc as documents so that a Form can be controlled like any other document. Then the document containing a form can be published as a Form so that designated users can fill it out. Once a user fills out a form, it is saved as a submission for that form. Form submissions can then be exports in various formats such as PDF, CSV, HTML, and XML (one submission per export file or all submissions in a single export file).

DM-411: Add Support for Running Work Bundles

The ability to run a work bundle has been added to TechDoc 9. A work bundle is a special file that can be uploaded to TechDoc to perform custom tasks. This feature is primarily intended to perform requests that might take hours to manually perform or to assist in special requests like custom import or export of data.

DM-583: Expose More Attributes on the Document and Generation Beans in Workflows

The Document and Generation beans in workflows have been updated to expose almost all their attributes. This allows more attributes to be used in conditional logic and as output in emails, etc. Even though not requested, the User bean was updated to expose most of the attributes of the current user for the same reasons.

DM-587: Create a DWG Text Extractor

Customers had previously asked for DWG text extraction support. However, we were unable to locate any reasonable solutions. While working on rendering of DWG files, we developed additional software that was able to support text extraction of DWG files and it has been added as part of this release.

DM-593: Remove Java Endorsed Third Party XML Extensions from TechDoc

With new improvements to Oracle's Metro stack, which is used for supporting the SOAP protocol, the older third party XML extensions can finally be removed from TechDoc's endorsed Java folder. The extensions provided functions previously absent from Metro but they also caused compatibility issues that limited other portions of the SOAP stack.

DM-596: Add Ability to Modify Settings on an SM Update

The ability was added so that SM Updates can be modified. Consider an issue such as a PDF file that hangs the PDF text extractor. Previously, once that happened, the only way to get the update through the system was to set "Resend Text" to "No" via the database and then restart Tomcat. This modify feature allows an Admin to toggle any one of the 3 "yes/no" options so that a direct database change is no longer necessary.

DM-599: Adjust Columns for Mime Type Keyword Aliases

The columns and columns headers were mismatched on the Mime Type Keyword Aliases after an update in TechDoc 8. The data was still being displayed but the columns and the headers were slightly offset by the update. This has been corrected so they display properly now.

DM-600: Add ID to SOAP Comment Service Add Operation

During upgrading of the SOAP Regression Tester, it was noticed that the SOAP Comment Service Add Operation does not return the ID of the newly created comment. All other add/create operations return IDs. Therefore, this operation was updated to be compatible with other similar SOAP operations.

DM-601: Add Attachments to Show Generations

Show Generation has been updated to show any generation attachments just like Show Document does. This makes it easier for users to determine what attachments are on a generation.

DM-602: Add Support for Hyper-V V2 in the tdmctrl Utility

A recent Microsoft security update to Windows Server 2012 caused intermittent problems while rendering with Hyper-V. It turns out that the security update broke Hyper-V V1 backwards compatibility, which tdmctrl depended on. tdmctrl has been updated to detect and use the new Hyper-V V2 interface when available in order for rendering to be reliable on newer systems.

DM-607: Upgrade Workflow to Use New Version of Activiti 5.16.4

TechDoc has been updated to use Activiti 5.16.4 so that workflow can leverage some of its new features such as Web Service Tasks that make SOAP available to BPMN processes.

DM-609: Workflow Engine Needs Support for Calling SOAP Services from a Process

In conjunction with the Activiti 5.16.4 upgrade, TechDoc has been updated to support calling SOAP services from a BPMN process. While this ability is present in Activity, it needed some work to allow Activiti to use the Metro SOAP stack instead of Apache CXF, which is not compatible with Metro.

DM-611: Process Triggers Need to Activate Processes by Key or ID

In order to take full advantage of process versioning, process triggers need to support using process Keys instead of IDs. IDs are tied specifically to a single revision of a process whereas a Key means use the newest version of a process with that Key. Process Triggers have been updated to support both Keys and IDs allowing automatic use of latest version of a process or being tied to a specific version of a process on a per trigger basis.

DM-612: Add Support for Rendering/Editing Workflow Form Enum Properties

TechDoc did not support rendering Workflow Form Properties of the type enum. TechDoc has been updated to display these types of properties as a drop down box so the user can choose the value from the list.

DM-613: Add Support for Groovy as a Scripting Language in Workflow Processes

In addition to JavaScript, the scripting language Groovy has been added so that it can also be used in script tasks in a workflow process.

DM-617: Update SQL Server JDBC Driver to 4.2

TechDoc has been updated to use the Microsoft SQL Server JDBC Driver Version 4.2, which includes support for TLS 1.0 being disabled.

DM-619: Allow Keywords to Be Deleted Even If They Are Currently Used

An improvement request was received to allow keywords to be deleted even if they are currently in use. This makes it much easier for Admins to remove keywords from their system that have become obsolete and are no longer wanted.

DM-621: Resubmitting a Document to all SM's Logs Generic History Not Document-Specific History

Resubmitting a document to all available SM's logged a generic history event. Since it is an activity for a specific document, it ought to have been logged as a document history event. You could still find the event in history but it is not directly tied to the document. For consistency with other document commands, the history event has been changed to be logged directly against the document.

DM-623: DM Log In/Out Log Messages Need Be More Specific

The DM Log In/Out log messages have been improved so that you can tell that they are for the DM. This is important if you are running a DM and SM on the same server. Previously, you couldn't tell if the user logged into the DM or the SM.

DM-624: Allow Report Criteria to Be Moved Up and Down on the Screen

While creating or modifying a report, the report criteria can now be moved up and down on the screen. Previously, the only way to reorder the criteria was to delete them and re-add them in the desired order.

DM-625: Update the TechDoc 9 DM to use Java 8

Since Java 7 has gone end-of-life, it required TechDoc to transition to Java 8 for continued security support. This turned out to be a rather large undertaking due to changes in the new bundled JavaScript engine, URL Connection error streams, collisions between the Santuario library and Java 8, and incompatibilities between Tomcat and Java 8.

DM-627: SAML Authenticator -e and -s Options Should Honor the -l Logging Option

The SAML Authenticator -e option was originally designed for internal testing to disable the encryption requirement for a SAML response. Like the -s option that disables the signing requirement, neither were intended for production use and as such both wrote debug information to the log separate from the standard information written when the -l option is used. Now that several customers use the -e option in production, the logged messages have been changed to only show if the -l option is used too.

DM-628: Show Vote Attachments When Showing a Full Review

An improvement request was received to show attachments for votes on the Show Full Review screen. Previously, the only way to see the attachments was to drill into the discussions to find the attachments, which is very time consuming; plus, there is no obvious way to even know that an attachment might be there. The vote attachments have been added to several other screens where votes are shown to make it even easier to find them.

DM-630: Add External UUID to an Attachment

An optional External UUID has been added to attachments so that they can be fetched by this UUID. This allows a UUID to be generated ahead of time so that fetch links to the attachment can be predetermined before an attachment record has actually been inserted into the database.

DM-631: Add Attachments to Advanced Search

Advanced Search for Documents and Generations has been updated to allow for searching on attachments.

DM-632: Add Attachment Support to the REST Protocol

Attachment support has been added to the REST protocol in the DM and in Scan Agent. Now attachments can be uploaded as documents are created in the DM via Scan Agent.

DM-634: Convert My Work to a Widget-based Dashboard

My Work has been converted to be a dashboard so that users can customize their My Work dashboard. The dashboard is initially configured so that it looks almost identical to the original My Work. A variety of different layout choices and widgets are available including Admin-only widgets, charts, graphs, and even external HTML/URL widgets that can display content from other non-TechDoc systems all on My Work.

DM-635: Log Output Returned by Render Commands to Aid in Troubleshooting

A trouble ticket was reported on a particular document that was failing to render. The problem was determined visually but it was noticed that other

output generated during the render process would have made it easy to determine and resolve the problem without having to catch the VM during the rendering process. When similar output is generated during a failed render attempt, it will now be automatically included in the render failure email.

DM-637: Removal of WebDAV Support

WebDAV support was removed from TechDoc 9. The protocol was never a good fit for importing documents into TechDoc because it lacked the ability to set any metadata, access, notification, etc. on the documents that were imported. It was originally developed as a stop gap until the TechDoc Client could be fully implemented.

DM-638: Increase the Size of a Document Number from 64 to 255

A request was received to increase the size of a document number to at least 130 characters. Several versions ago, the Search Manager was updated to handle a document number that was up to 255 characters long. As such, the document number has been increased on the DM to 255 characters as well.

DM-641: Add Reason to Show History When Appropriate

When the details screen is displayed for Show History, the reason is now included in the display. The change was also made to Show Activity and Advanced Search.

DM-642: Update SM Hosts to Allow Admin to Have More Control Over What Is Sent to the SM

Previously, the Search Manager Type (Campus, Community, etc.) was used to determine what Read Level a document had to have before full text, thumbnails, and released documents were sent. Now, the Admin can determine which read level triggers each of these 3 types of content to be sent to the SM. For example, a Campus search engine could now be configured to send full text for all documents regardless of read level, to send thumbnails for documents with Campus Read or higher, and never send released documents.

DM-643: Add Secondary Target to Full History

The secondary target is now displayed in the full history output of Show Activity and Show History. Some DM commands affect multiple targets. For example, when you add a document to a project, the project is the main target that is being "changed". However, the document is also affected because it is now part of a project. Previously, there was no easy way to see that the document was affected too.

DM-644: Allow Multiple Users to Map to Single Authentication and Allow Fast Switching Between Them

Multiple TechDoc user accounts can now be mapped to a single remotely authenticated user and allow switching between them once logged in. The primary purpose of this feature was to support Admin logins via Smart Card but it also provides additional benefits such as allowing a user to log in as a normal user and then switch to a test account with limited privileges, to an Admin account, or to any other account that shares the same remotely authenticated user.

DM-646: Convert TechDoc to Web Application in Build Environment

TechDoc has been converted to a Web Application in the NetBeans build tool environment. This permits much more complex web services to be implemented with much less effort by the development team.

DM-647: Update code signing certificate that will expire first part of 2016

A new code signing certificate had to be used for signing TechDoc 9 DM components since the current code signing certificate expires in the first half of 2016.

DM-648: Update DM to Default External Base URL to HTTPS

As a best security practice, the DM now defaults the External Base URL system property to use HTTPS instead of HTTP.

DM-649: Add Support for External Groups from Authenticators

Support for External Groups have been added to the DM. An Admin can create an External Group and specify the External Group ID associated with the External Group. Then users can associate the External Groups to documents, folders, etc., like any other group. The Windows Domain and SAML Authenticators have been updated to return the Windows group SIDs that a user has when they log into TechDoc. Users can gain access to documents, folders, etc., when their group SIDs match External Groups that have been associated to the items.

DM-650: Update the TechDoc Client for TechDoc 9

The TechDoc Client was updated to work with TechDoc 9. As part of the update, the client was updated to Java 8 in order to support TLS 1.0 being disabled on the client or server.

DM-651: Update the DM to Handle TLS 1.0 Being Disabled

Due to flaws in TLS 1.0, the DM was updated to support TLS 1.0 being disabled. Note that many other applications and services still require TLS 1.0 so you should not assume that you can immediately disable TLS 1.0 on the

server running the DM until you check everything else running on that same server or remote services used by the server such as a remote SQL Server database.

DM-652: Display Service Data Help in DM Create/Modify Authenticator

The Create and Modify Authenticator servlets on the DM now display the Service Data help for the selected Authenticator initially (on a Modify) and update the Service Data help (on both) when the Service Name is changed by the user.

DM-654: Add Update Priority to SM Updates

While working on an extremely large migration for a customer, it became obvious that the SM updates process needs the ability to prioritize SM updates. For example, when importing a large number of historical documents into TechDoc, it would be nice if normal user document changes were processed at a higher priority than the historical documents that were being created so as not to slow down normal production activity.

This is the first step in fully utilizing priorities. A separate issue will be created to add REST protocol support for specifying priority and an update to Scan Agent to allow a particular worker to specify a different priority.

DM-655: Increase Reason and Details on DM History from 128 to 255 Characters

A customer request was received to increase the reason field in history to allow for more input. Because Details, which is generated by the system, is the only short field left in history, it will be lengthened to 255 also for consistency.

DM-656: Removal of SharePoint Mirror Support

SharePoint mirror support was removed from TechDoc 9. The TechDoc SharePoint Mirror Solution required access to capabilities that have been disabled by various Microsoft security updates to MOSS. It has now come to the point where the mirror solution can no longer operate in the SharePoint environment.

We are currently working with customers to add SharePoint Business Connectivity Services (BCS), which is Microsoft's recommended solution moving forward. This approach will allow customers to have much more control over how data is exchanged with TechDoc and allow for automated work flow to perform various TechDoc-specific operations.

Please note that we do plan to continue support and development of the TechDoc SharePoint web parts too. The decision to drop the mirror was a difficult one and only made because it was no longer technically feasible.

DM-657: Add Text Extractor for iGrafx FlowCharter Templates

The capability to extract text from iGrafx FlowCharter Templates has been added to TechDoc.

DM-658: Prevent Wrapping of Revisions on Status Retrieval Screen

Per request, document revisions no longer wrap on the Status Retrieval screen. Some customers use revisions of dates with dashes which most browsers readily wrap on, which make it more difficult to read the dates.

DM-659: Add ID Attribute to DM HTML Body Tags for Easy Identification in CSS

While working on DM-658, it became apparent that making emergency (or customer unique) page-specific formatting changes would be much easier if each output page identified what servlet or class generated the page. An ID attribute has been added to the body tag of each page that the TechDoc DM outputs to make it easy to identify and adjust formatting using only simple CSS selectors should the need arise.

DM-660: Add Semicolon Separation Support to *SendEmail* Task to Allow Multiple TO, CC, and BCC's on a Single Email

The TO, CC, and BCC variables on the *SendEmail* task have been improved to support multiple emails separated by semicolons to make it simpler to send email to multiple recipients and make it more consistent with Outlook.

DM-662: Add New Workflow Service Task that Allows Adding Comments to a Document.

A new server task has been added to workflow so that comments can be easily added to a document. Comments are an easy way for a workflow process to add notes or events to a document so that people can review them later.

DM-663: Adjust Compose Email Usage to Match Syntax Used in Workflow

The workflow engine uses a specific syntax for identifying groups versus users. The syntax is *group(GroupName)* or *user(Username)*. If neither is used, it is assumed to be a Username. Compose Email has been changed to support this syntax as well. This will make it more uniform for people who send email via workflows or the Compose Email servlet.

DM-668: Render Task Could Stop If It Loses Connection to the Database

The Render task could stop if it lost connection to the database. The task was changed to try to continue while only sending an alert every 30 minutes if database connectivity continues to be down. This way admins will know if the database is down for extended periods of time but won't be spammed over night with hundreds of emails.

DM-669: SM Updater Task Could Stop If It Loses Connection to the Database

The SM Updater task could stop if it lost connection to the database. The task was changed to try to continue while only sending an alert every 30 minutes if database connectivity continues to be down. This way admins will know if the database is down for extended periods of time but won't be spammed over night with hundreds of emails.

SM-16: Add Ability to See Currently Logged in Users

An Admin can now see user's currently logged into the SM. In addition, active sessions are tracked based on how they are interacting with the system. Currently, there is only one way that users interact with the SM, which is Web sessions (users/applications interacting via the HTTP/HTTPS protocol, typically users accessing TechDoc via a web browser).

SM-17: Log Users That Timeout

The SM now logs users that timeout due to inactivity. Previously, if a user closed their browser without logging out, there was no log or history record written of the timeout.

SM-123: SM Log In/Out Log Messages Need Be More Specific

The SM Log In/Out log messages have been improved so that you can tell that they are for the SM. This is important if you are running a DM and SM on the same server. Currently, you can't tell if the user logged into the DM or the SM.

SM-124: Update the TechDoc 9 SM to use Java 8

Since Java 7 has gone end-of-life, it required TechDoc to transition to Java 8 for continued security support. This turned out to be a rather large undertaking due to changes in the new bundled JavaScript engine, URL Connection error streams, collisions between the Santuario library and Java 8, and incompatibilities between Tomcat and Java 8.

SM-126: Add Reason to Show History When Appropriate

When the details screen is displayed for Show History, the reason is now included in the display. The change was also made to Show Activity and Advanced Search.

SM-127: Update code signing certificate that will expire first part of 2016

A new code signing certificate had to be used for signing TechDoc 9 SM components since the current code signing certificate expires in the first half of 2016.

SM-128: Update SM to Default External Base URL to HTTPS

As a best security practice, the SM now defaults the External Base URL system property to use HTTPS instead of HTTP.

SM-129: Update the SM to Handle TLS 1.0 Being Disabled

Due to flaws in TLS 1.0, the SM was updated to support TLS 1.0 being disabled. Note that many other applications and services still require TLS 1.0 so you should not assume that you can immediately disable TLS 1.0 on the server running the SM until you check everything else running on that same server or remote services used by the server such as a remote SQL Server database.

SM-130: Display Service Data Help in SM Create/Modify Authenticator

The Create and Modify Authenticator servlets on the SM now display the Service Data help for the selected Authenticator initially (on a Modify) and update the Service Data help (on both) when the Service Name is changed by the user.

SM-131: Increase Reason and Details on SM History from 128 to 255 Characters

A customer request was received to increase the reason field in history to allow for more input. Because Details, which is generated by the system, is the only short field left in history, it was lengthened to 255 also for consistency.

SM-132: Add ID Attribute to SM HTML Body Tags for Easy Identification in CSS

While working on DM-658, it became apparent that making emergency (or customer unique) page-specific formatting changes would be much easier if each output page identified what servlet or class generated the page. An ID attribute has been added to the body tag of each page that the TechDoc SM outputs to make it easy to identify and adjust formatting using only simple CSS selectors should the need arise.