



Arco

Arco DocRoom and Routing

A new era in document management.

Release notes for DocRoom 6.6.2

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1 Introduction

The DocRoom and Routing 6.6.2 release is a minor release containing enhancements for DocRoom and Routing.

If you're upgrading, make sure to read the *How to upgrade from an older version* section.

Minimum requirements:

- No new requirements have been added.

2 New features and Improvements

2.1 For end users

Search and results

- Fixed highlighting issues when searching for exact values (i.e. using double quotes in the search).
- Some performance improvements have been made when loading big routing lists.
- The 'Recent documents' functionality has been updated:
 - o The number of items in the recent documents list is limited to the 'arcoinfo.interface.RecentItemsCount' parameter.
 - o The date column shown in the list of recent documents reflects the date of last action on the document. This date is updated when new actions are performed on the same document.
 - o The list is by default sorted on the last action date, showing the most recent changes on top of the list.

DocRoom Tree:

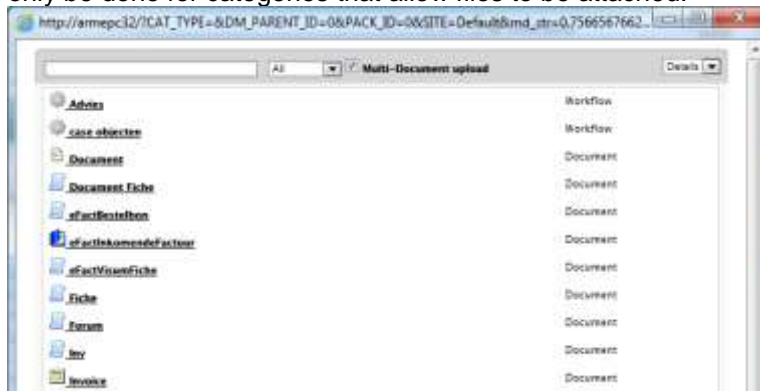
- The selected default search and result screens of folders are now also copied when they are used as templates for the creation of new folder structures.
- Groupers on managed lists no longer translate the caption of the item when selecting the item in the grouper. As a result, hyphens in the caption of list items are no longer translated to the 'NOT' operator.

Web-scan:

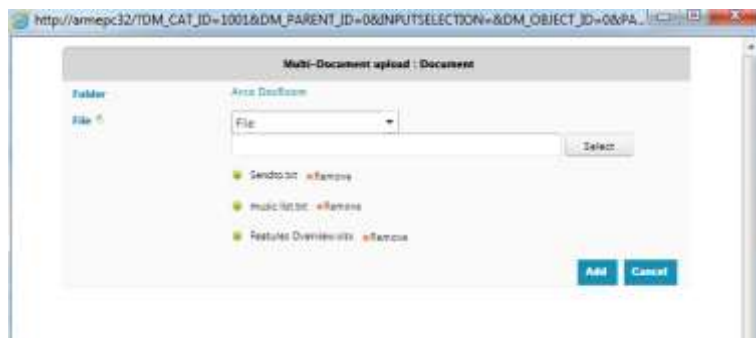
- The upload button in the web-scan module is no longer disabled when a file is available for upload.
- Zoom-out no longer does a zoom-in.

Working with files:

- A great new feature is introduced in this version to allow users to select more than one file at the time when uploading files from their pc.
 - o If more than one file is allowed for a category, users can select more than one file when adding new files to a document/workflow.
 - o When creating new documents, the 'Multi-document upload' option allows a user to create multiple documents (each document only contains one file) of the selected category.
 - o To do so, check the 'Multi-Document upload' checkbox in the category selection screen and click the desired category. A multi-document upload can only be done for categories that allow files to be attached.



- o Select all files that should be uploaded in docroom. Hold the CTRL key to select file by file, hold the SHIFT key to select a range of files.



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- After clicking the Add button, a multi-document index screen is shown (one for every selected file):



- Click the 'Save'/'Save and close' button to create the documents.
 - A screen of the (new) 'BATCHUPDATE' type can be created in DomaAdmin to configure the properties that should be shown in the multi-document index window.
- The generation of file renditions occasionally failed because files were locked by other persons/processes. This is no longer the case.

Detail screens:

- The list of mail attachments in a mail now also wraps in the mail header (instead of being shown on one single line).

Doma Explorer:

- To be consistent with the DocRoom web interface, the file icon is shown on the same line if only one file exists, otherwise all files are shown on a sub level of the document.
- Doma Explorer now has a more advanced settings screen in which logical validations are executed and only valid options are suggested.
- Packages in the tree are now shown with their labels instead of their original package name.

Managed lists:

- Updated the look 'n feel of the concept tree and thesaurus managed list fields:
 - The path of the selected nodes is now visible in the selected items list
 - List of selected items in the vocabulary window has been reorganised.
 - A new option can be set to only allow users to select lowest level nodes in the concept tree.

User preferences:

- A new user preference ' Show Delegated Workflows in My Work' has been added. With this preference, users can indicate whether they want to see all delegated work in their work list by default or not.
- The 'Records per page' user preferences no longer generates errors when set to 0, instead this value is replaced by 10 automatically.

Other:

- Applied corrections or updates to labels and translations.

- Delegations defined for specific procedures no longer show all work of the delegated user in the work list.

2.2 For administrators

Admin pages:

- When creating a user that already exists in DocRoom, a clear error message is now shown to the users.

Setup:

- The setup utility no longer generates errors when ran on a Dutch or French Windows Server OS.

2.3 For developers and configurators

Routing – DocRoom configuration:

- A new screen mode can be used for documents: 'BATCHUPDATE'. This screen is used when the user performs a multi-document upload or when the user performs a multi-document update.
- The file upload control can now be added to document detail screens of DocRoom and Routing as a screen item. This way, users can edit metadata and upload file(s) at the same time, from the same detail screen.
- DomaAdmin now allows the user to enter a URL for screens with the screen type 'Custom'.
- Added the possibility to verify whether the user actually saved an object or that a temporary save was triggered (caused by a page refresh) in conditions. Use the [.IsTempSave.] variable to validate the save status.
- When saving a procedure an extra validation is added to verify the existence of default executors for all normal steps.
- The database connection string for advanced lookups can now be set in DomaAdmin. Previously, only ODBC connections were supported. Now native oracle, sql server and oledb connections are also available.
- Notifications can now be sent synchronously. There won't be any delays when sending mails but the user will have to wait for the mail to be sent when dispatching cases.

Routing – DocRoom development:

- A new screen mode can be used for documents: 'BATCHUPDATE'. This screen is used when the user performs a multi-document upload or when the user performs a multi-document update.
- When using the DocRoom search API, the ExpandResults search criteria parameter was not taken into account. This has been solved and as a default the ExpandResult parameter is set to True to have the same default behaviour as before. If you only need to perform a search in DocRoom and only work further with the ID of the documents, you can set the ExpandResult parameter (as well as the ExpandProperties and ExpandFiles parameters) to false for best performance.

Import Export:

- Importing 'Custom' screen types (for which a URL has to be defined that handles the visualisation) now also imports the 'URL' value.

Site management:

- Delegations are now by default shown in a drop down. This dropdown list holds all active delegations, the current user's work and all work the user can perform. This option can be enabled by adding following item to the grid toolbar file:

```
Item Text="Select work" ImageUrl="~/Images/UserDelegate.png"
LabelE="Select work" LabelN="Werk kiezen" LabelF="Choisir
travail" NavigateUrl="javascript:#GRID#.ToggleHideDelegated();"

```

3 How to upgrade from an older version

3.1 Before you upgrade

Upgrading from a pre-6.1.5 release

- Remove the file `domaRoot\Web\Appcode\NewObjectMenu.vb` as it has become obsolete.

Upgrading from a pre-6.3 release

- Remove the `<system.serviceModel>` (and content) element from the `Arco.ApplicationServer.Service.exe.config` file.
- Update the `LibraryMenu.xml` file and replace
`<Item Text="Cases" NavigateUrl="Javascript:ViewList('Case');"></Item>`
With
`<Item Text="Cases" NavigateUrl="Javascript:ViewList('opendossiers');"></Item>`

Upgrading from a pre-6.4 release

- DocRoom and Routing now use .NET framework 4.0, therefore this framework needs to be installed before proceeding. Do not forget to register this version of the framework in IIS (required if the framework was installed after the installation of IIS). You can do this by executing
`"C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_regiis.exe -i -enable"`
from the command prompt (RUN AS ADMINISTRATOR!) for 64 bit machines and
`"C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -i -enable"` for 32 bit machines (or if your DocRoom and Routing site has to run in 32 bit mode).
- Remove the `web.config` file from the `[ROOT]\web\DocRoom` folder. Keep a copy in a safe place.

3.2 Upgrade

- Stop all Doma Application Services as well as all DocRoom and Routing websites and application pools.
- Run the upgrade scripts that are provided on the installation CD. Make sure every upgrade script from your version to the new version is executed in the correct order. The correct order is insured through the numbering of the directories.
- Run 'Setup.exe' from your installation CD and select the 'Repair' option. This will install the new version of the software in the location of the initial install.

3.3 After the upgrade

Upgrading from a pre-6.2 release

- Starting from the 6.2 release, 2 Arco Application Server versions are installed. By default the 'any CPU' version will be used. If you require to run the application server in 32 bit mode on a 64 bit server, the default application server should be stopped and the X86 application server should be started (remember to adjust the start-up parameters, set the X86 version to start automatically and the default application server to manual. This is required if you want to run Routing 4 (vb) scripts on your environment. Remember that by default in this instance, the data caching option of the application server is disabled.

Upgrading from a pre-6.3.1 release:

- Reconfigure the code lookup properties to have a separate code and description field in DomaAdmin
- The login function in the Doma API is no longer available as "Arco.Security.BusinessPrincipal.Login" but only as "Arco.Doma.Library.Security.BusinessPrincipal.Login". This function only needs to be called from within external applications but breaks compatibility when used.

Upgrading from a pre-6.4 release

- If you upgrade to DocRoom and Routing 6.4, re-configure the new web.config file (because you removed it a few steps before).
- **Set the application pool of the DocRoom and Routing site to use framework 4.0 and put the application pool in integrated mode.**

Upgrading from a pre-6.5 release

- Remove all default configuration files from the .\Sites\Default configuration folder. Only files that differ from the default configuration files should be kept in the .\Sites\Default folder.

Upgrading from a pre-6.5.2 release

- In the system.web\httpModules *AND* system.webServer\modules sections of the web.config file, add following element:
<add name="Authentication" type="Arco.Doma.WebControls.AuthenticationModule, Arco.Doma.WebControls" /> This is done automatically by the SetupDocRoom module in update mode.
- Add the documentSub element to any custom PreviewTabs.xml file that might be used.

Upgrading from a pre-6.6 release

- The DRUM mail connector engine has been replaced by a new and improved object. However this cannot run in both 32 and 64 bit mode. **PLACE THE CORRECT CHILKATDOTNET4.DLL IN THE BIN OF THE APPLICATION SERVER.** If the application server runs in **32 bit mode**, copy the domaroot\lib\X86\ChilkatDotNet4.dll to domaroot\Bin. If the application server runs in **64 bit mode**, copy the domaroot\lib\X64\ChilkatDotNet4.dll to domaroot\Bin. The same applies for the DomaAdmin folder if you want to configure and test mail uploads via DRUM.

Always

- Restart all Doma Application Services as well as the DocRoom and Routing websites and application pools.
- **Make sure the Service user attribute in doma.config is a valid docroom admin account.**

3.4 Multiple DocRooms on the same server

See section 'Before the Upgrade' for every instance you want to upgrade.

Upgrade

- Run the database upgrade script for every instance
- Copy the domaRoot\Bin (without the *.config files) folder to every instance on the server
- Copy the domaRoot\Web (without the web.config and web.sitemap files) to every instance on the server.
- **Execute domaRoot\Bin\SetupDocRoom.exe UPDATE . This starts the setup routine in Update mode to update config files whenever necessary.**

See section 'After the upgrade' for every instance you want to upgrade.