

Document Manager 5.9

Summary

Document Manager 5.9 is the exciting new release of Document Manager 5 (DM5) from Document Logistix. DM 5.9 builds on the success of the previous versions and continues to be more efficient, more secure and easier to use, while still retaining ease of deployment and scalability. The purpose of this document is to summarise the new product features that have been introduced with 5.9.

DM 5.9 New Features

- **Code base moved to .NET Core:**
 - Increased security
 - Ease of maintainability
 - Continued support from Microsoft
- **Updates to latest supported third-party components:**
 - Support for JPE, GIF, SVG, TGA, JFIF/JIF, WEBP, PCX/PCC and JBIG2/JB2 file types
 - Support for rendering embedded barcodes in Word documents
 - Pan Intelligence integration moved to the v2 API
- **Further Admin Enhancements:**
 - Enhanced layout and more quick actions
 - Management of Document Types
 - Management of Drawers
 - Management of Domains
 - Management of Common Indexes
 - Management of Retention Policies
 - Management of Dynamic Permissions
 - User Account expiry and notifications of password expiry
 - Configuration of export filenames
 - Added API URL system setting for API discovery
 - Expanded current System Settings with the ability to manage Retention Settings
- **Audit Enhancements:**
 - Enhanced coverage for further compliance
 - New format for ease of reading and ease of reporting
 - Support for legacy format

- **Workflow Enhancements:**
 - Support for multiple document actions
 - Support for Retention Indexes in conditions and actions
 - Support for adding Sticky Notes and redactions
 - Support for running automated Workflow steps
 - Support for error handler actions
 - Steps can be marked as single document only
 - Additional Data Expressions: PolicyId, PolicyName, PolicyStartDate, PolicyPurgeDate, PolicyArchiveDate, PolicyAutoMoveDate, PolicyPurgeStatus, FolderPolicyId, FolderPolicyName
- **API Enhancements:**
 - API documentation built in
 - Supports new audit structure
 - Supports versioning for backward compatibility
 - New API endpoints for:
 - Large document upload
 - Download of multiple files in ZIP
 - Drawer – creation, modification, deletion
- **Standalone Database Management Tool:**
 - Creation, upgrade and maintenance of Configuration and Document databases
 - Licensing of databases
- **Permission Enhancements:**
 - Separate permission for creating top-level folders and subfolders
 - Global Access now applies to searches and workspaces (if the user visits the search/workspace via a direct URL only)
- **UI Enhancements:**
 - Configurable toolbars/menus
 - Email dialog redesigned
 - Change Database option removed
 - Explorer:
 - Create folder at expanded level
 - Caching to remember Tree View contents and expansion
 - User Settings:
 - Option to hide thumbnail view on import
 - Document thumbnail hover display

- Option to reduce tab strokes
- Option to reduce notifications
- Option for larger thumbnails
- Option to see Page Size if it is modified directly via the database
- Document Viewer:
 - Email page selection
 - Annotation auto-save
 - Send annotations to front/back
- Removed watermark from index mask
- Consolidated audit view for all document versions
- Export of all notes for a folder/document
- Search on version number
- Enhancement of Multi Document Info dialog
- Renamed folder "Retention Policy" index to "Folder Retention Policy" to differentiate it from the document "Retention Policy" index
- **Updates for compatibility to:**
 - IOS mobile app
 - Pre-Render Service
 - Retention Service
 - Batch Capture

Code Base and Updates

Document Manager 5.9 has been updated to use .NET Core, which gives added security, maintainability, and continued support from Microsoft. Its components have also been updated to the latest versions to bring new features and ensure up-to-date security and the latest fixes.

Administration

The administration side of Document Manager 5.9 has been further enhanced to bring new features like Drawer, Document Type, Retention and Permission Management. There are further security enhancements with account and password expiry options and more system-wide settings to manage. The User Interface (UI) also has an improved flow with additional quick actions added to the homepage.

Audit

The auditing feature of Document Manager 5.9 has been completely redesigned to give better coverage and enhanced compliance. The Audit Trail is now more detailed and is easier for the administrator/user to read whilst also maintaining compatibility with the legacy audit data. The way

Document Manager 5.9 stores its audit data has also been overhauled making it easier to generate reports from the stored data.

Workflow

The Workflow Engine and Designer in Document Manager 5.9 has been enhanced to include support for multiple document actions, Retention actions, Sticky Notes and redactions, automated steps and the addition of more Data Expressions. This gives the system more power and flexibility to create more business-centric and automated Workflow processes.

API

The API in Document Manager 5.9 now includes documentation built into it. This documentation is self-generating so as the API gets future updates, the documentation also updates. In addition, the API now supports versioned endpoints for backward compatibility and is completely compatible with the new audit structure of the product. Some additional endpoints have been added to support large file uploads and for downloading multiple files.

Database Management Tool

Document Manager 5.9 now ships with a completely standalone Database Management Tool. This allows the administrator to create, upgrade and maintain configuration and document databases. The tool provides support for databases from 2.8 and greater and also allows the administrator to apply and manage licenses for the databases.

Permissions

Security is a top priority of Document Manager 5.9 and in this space additional permissions have been added to separate out top-level and subfolder permissions. The Global Access permission now also applies to searches and workspaces.

UI

The User Interface is a key part of the product and in Document Manager 5.9 this hasn't been forgotten. A number of enhancements have taken place in this area to make the user's life easier, including the ability to configure toolbars/menus, a redesign of the Email dialog, Explorer content caching, auto-saving of Viewer annotations, additional User Settings and enhancements to the search. This has all been done whilst maintaining the look and feel of the interface to maintain familiarity.

Modules

Document Manager has several additional modules that combine to enhance the product and give further capabilities. Some of these modules, including the iOS mobile application, Retention Service, Pre-render Service and Batch Capture application, have been updated to ensure compatibility with 5.9, and make use of the 5.9 enhancements.