Release Notes

iPortalDoc — Document and Process Management

v7.0.1 to v7.0.4.001.84

Release Notes

iPortalDoc — Document and Process Management

v7.0.1 to v7.0.4.001.84

v7.0.4.001.84

New Features

- Editable file download — a module that makes this option available in the Document menu and specifies which Document Types (Word, Excel and other templates) and users may use it.

Improvements

- Landing Pages — configuration interface.
- AI — Knowledge Units — configuration interface.
- Action interface with the “Insert Document” sub-action — button display.
- Automatic creation of folders in YYYY/MM/DD format.
- Application performance.

v7.0.4.001.83

New Features

- Document menu — Export Chronological Diagram.
- In the text editors of PDF Template document-type forms, the spellchecker has been enhanced: when spellchecking is disabled, the context menu is also disabled, allowing users to use the right mouse button for other purposes.
- “Move Document with Classification” workflow task — can be configured to save documents in the folder corresponding to the document’s month.
- Workflow-type actions — “Associated Documents” block — allows selection of a folder in the Document Hierarchy and displays the available parameters/columns according to its customization.

Improvements

- “Save As” for documents.
- Insert documents into a dossier.
- 11522 — Application performance.
- Signing with the Citizen Card’s Digital Mobile Key (CMD) — when signing multiple documents at once, document names were not displayed correctly.
- Workflow task “Notify all users who participated in the workflow” — now considers active users only.

v7.0.4.001.82

Improvements

- Workflow-Type Action Manager — performing an action when a task updates the document revision.

v7.0.4.001.81

Improvements

- Export advanced search results to Excel.
- Perform actions in bulk.

v7.0.4.001.80

New Features

- Workflows — new features to manage and reassign the various actions assigned to a given user to another user or group.
- Exclude selected Document Types from the associated-documents visibility flag behavior.
- Public document permission — configuration of document types that may be made public now allows specifying which profiles can access this feature on the document permissions page.
- Workflow Editor — usability improvements and the ability to remove rows or columns from the grid layout.
- Pending actions list — display the Chronological Diagram on mouseover.

Improvements

- REST API downloadPDFUser — include document metadata (auxiliary fields).
- Action layout — customization of the associated-documents table, with options selected by default.
- PDF template editor layout improvements.
- Watermarks — PDFWriteText.jar — set text color using #FFFFFF format.
- “Execute REST web service external to iPortalDoc” task — JSON formatting.
- “Automatically send document by email” task — character escaping.
- PDF Template — in the text editor with multiple images, the Update and Preview buttons were not displayed.
- SAML authentication.

v7.0.4.001.79

New Features

- Light link for inserting documents via the Intranet Portal.

Improvements

- Import and classification of documents received through a shared folder using an XML file.
- Email display in the Email Reader.
- PDF Templates — the PDF file was generated correctly, but its corresponding XML file had a size of 0 bytes.

v7.0.4.001.78

Improvements

- SOAP web services setDocConfidentiality and setDocumentClassification: code adjustments and corresponding error messages.
- Workflow action layout: customization of the associated-documents table.
- Layout: display of buttons.
- PDF templates: the PDF file was generated correctly, but the corresponding XML file was 0 bytes.
- Updating the revision of a PDF-template document after a 'reclaim action on document' operation.

v7.0.4.001.77

New Features

- REST API downloadPDFUser: provide document metadata.
- Workflows: the 'Check document classification' action task now allows document types to be selected.

Improvements

- Bulk classification.
- Improved performance when inserting MS Office templates.
- WebOffice templates: issue when inserting/updating.
- Landing Pages: fields populated with empty values.

v7.0.4.001.76

New Features

- Document reference automatically included in emails.
- Classify metadata for N documents through bulk actions.
- Landing Page: when inserting a document, display auxiliary fields in tabular format.
- Action interface, 'Associated documents' block: ability to configure the folder in the hierarchy from which the columns displayed in the document list are obtained.

Improvements

- Knowledge Units: change to menu behavior.
- Action generator and action interface: frame behavior.
- PDF templates: issue with the use of the non-breaking hyphen.
- Email reader: administration interface for updating or removing mail contacts/accounts of the 'Collected recipients' type.
- Insert documents into a dossier: classification inherited from the dossier.
- CMD signing: submit the token when Enter is pressed.

v7.0.4.001.75

New Features

- Action generator: elements containing lists of associated documents can be configured to open in a frame within the action interface.
- Filtering (magnifying-glass icon) is now available in the columns of search-result lists.

Improvements

- Document insertion interfaces: update the layout when the document type changes.
- Functionality for creating user groups.
- Registry: comments not visible.

v7.0.4.001.74

New Features

- Ability to configure columns in the pending-actions list for multiple users.

Improvements

- 'Access a link' sub-action: failure to open the URL in actions configured in previous versions.
- 'Access a link' sub-action: security.

- Update Document Revision sub-action.

v7.0.4.001.73

New Features

- Configuration and validation of IP address ranges when accessing a Landing Page.

Improvements

- Workflows: add rows to the workflow-creation interface grid.

v7.0.4.001.72

New Features

- Ability to define multiple configurations for the 'Access a link' sub-action.

Improvements

- Insert documents into a dossier.
- Permissions and display of the document hierarchy in iPortalDoc-Light.
- Expenses/Processes module (WebApp): opening documents originating from the module after a document search.
- Ability to configure which users may use group email addresses when sending email replies.
- Contacts auxiliary fields.
- Document menu: 'Confidential' option.
- Document list: sorting by code.
- CMD SCAP: improved logging and connection-error messages shown to the user.
- OCR: batch insertion/export.
- iPortalDoc user management: Positions.

v7.0.4.001.71

New Features

- Mail reader: administration interface for updating or removing mail contacts/accounts of the 'Collected recipients' type.
- Task to associate the documents associated with an associated document.
- REST API: mark/unmark document confidentiality.

Improvements

- Replicate permissions to a group: progress bar.
- Insert rows into a workflow diagram while editing.
- PDF templates via Online Counter: allow item tables to be generated.
- Permission management by user when selecting the group and user.
- PDF templates: font and font-alias management.
- Document Insertion module.
- Return information after running an 'Insert Document' or 'Update Revision' sub-action within an action frame.
- Menu layout adjustments in the dbdocmails module and Settings > Users.

v7.0.4.001.70

New Features

- Expenses/Processes module in the iPortalDoc WebApp.

Improvements

- Folder and action fields in alphabetical order — part II.
- Template opened in form mode: information display.

v7.0.4.001.69

New Features

- Subscription-based licensing.

Improvements

- Performing actions: validation of 'Required' and 'Display Warning' — part II.
- Circular letter functionality.
- OCR: separation by barcode.
- Bulk actions: element for assigning a deadline to the next action.

v7.0.4.001.68

Improvements

- Replicate permissions.
- Re-enable drag and drop for all text-file input and textarea elements.
- Folder and action fields in alphabetical order.

v7.0.4.001.67

Improvements

- Download search results to Excel.
- Chronological diagrams: link to access the document in action comments.
- 'Check document classification' action.
- 'Insert documents' sub-action now supports multiple drag-and-drop files.
- Action list: filter in the action column.
- Performing actions: validation of mandatory execution and display of warnings.

v7.0.4.001.66

Improvements

- SCAP: retrieval of attributes — secretkey.

v7.0.4.001.65

Improvements

- Execution of a REST web service external to iPortalDoc: action comment (part II).
- Citizen Card authentication: certificate upload. English translation — original pages 9–14 (versions v7.0.4.001.64 to v7.0.4.001.39)

v7.0.4.001.64

Improvements

- Light server configuration — administration interface.
- Execution of a REST web service external to iPortalDoc — action comment.

v7.0.4.001.63

Improvements

- Insertion of an association tag for emails replied to through the iPortalDoc email reader.
- Group filtering using the magnifying-glass search.
- iPortalDoc user-management interface.

v7.0.4.001.62

Improvements

- Correction to the action execution process.

v7.0.4.001.61

Improvements

- Correction to the action execution process.

v7.0.4.001.60

Improvements

- Signing with a smart card.

v7.0.4.001.59

Improvements

- The 'Change Document Classification' task can now be configured multiple times in action types.

v7.0.4.001.58

New Features

- REST API — getDocumentClassification.

Improvements

- Profile Management — Action Management option: help text added.
- REST API invocation task.
- The 'Change Document Classification' task can now be configured multiple times in action types.
- SAML authentication — allows synchronization of groups from the associated LDAP server.
- Bookmarks — functional improvements.
- Smart-card signing.
- Document type — template in form mode: update-revision icons at the top.

v7.0.4.001.57

New Features

- Additional module to configure which users can use group email addresses when sending new emails.
- Workflow task — 'Convert PDF into a searchable PDF'.

Improvements

- Folder +Info in the document hierarchy no longer displays inactive system users.
- Behavior of user-defined predefined comments when the comment field uses a text editor.
- Behavior of an action with three frames.

- Export search results — record downloads in the 'Application Log' module.
- +Info — display of workflow information.
- System: permissions in the dbdoc database.
- Action execution interface — link behavior.
- iPortalDoc email reader — unrecognized characters.
- Action to stamp a document with a comment.
- Workflows — 'Document inherits classification from associated document' task.
- Action list — interface display when navigating between pages.

v7.0.4.001.56

New Features

- When replicating permissions, users can select a user group instead of only an individual user.
- Workflow task — 'Concatenate PDF attachments with the PDF document'.
- Web service — setUser.
- CMD digital signing — no longer automatically open the signed PDF.
- Chronological diagram — labels added to comments to make them more visible to users.

Improvements

- Importing Landing Page configurations.
- 'Save As' and autosave features in PDF templates.
- MyDocs — Promote Document.
- PDF templates — viewing PDFs in Acrobat Reader.
- Digital signing with CMD.
- Performance of the document list within a folder.
- SAML authentication.
- Editing Office Word templates.
- Workflow task — 'Modify Document Type'.
- Sub-action interfaces/frames are loaded differently according to what the user clicks.

v7.0.4.001.55

Improvements

- PDF templates inserted through Light.

v7.0.4.001.54

Improvements

- PDF templates inserted through Light.

v7.0.4.001.53

Improvements

- Email association.
- Resizing the folder hierarchy.
- iPortalDoc layout.
- Pending-actions list — display the previous action's comment.

- Improved performance of background action execution.
- PDF templates inserted through Light.

v7.0.4.001.52

New Features

- Ability to resize the document hierarchy.

Improvements

- New FOP version to ensure compatibility of generated PDFs with Adobe software.
- Text search.
- Auxiliary-field management interface — performance.
- Roundcube — issues displaying UTF-16LE-encoded text.
- Improved performance of background action execution.

v7.0.4.001.51

Improvements

- Text search.
- Email document file (.eml) — Roundcube.
- PDF template insertion — save statistics.

v7.0.4.001.50

Improvements

- REST API — getDocsByUC: include the document author's name.

v7.0.4.001.49

Improvements

- Importing PDF templates.

v7.0.4.001.48

Improvements

- REST API — getDocsByUC.
- Remove leading and trailing spaces from the document code when using 'Change Info'.
- Knowledge Units (KUs) — permissions.
- Workflow task 'Execute Web Service External to iPortalDoc' — extra parameters.
- Performance when displaying the folder list in the document hierarchy.
- PDF templates — export-template functionality.

v7.0.4.001.47

Improvements

- Workflow task — 'Execute Web Service External to iPortalDoc'.

v7.0.4.001.46

Improvements

- Text search — HTTP 500 error when thousands of entities exist.

- Roundcube — printing error.
- SAML authentication — IPBRICK.OS v7.0 IdP.
- Download files using the title defined in the application.

v7.0.4.001.45

Improvements

- Document Insertion module.
- Workflow task 'Automatically Send Document by Email' does not correctly recognize the selected address.
- Ability to configure auxiliary fields so that iPortalDoc does not strip spaces from item descriptions.

v7.0.4.001.44

Improvements

- iPortalDoc Signer — document-signing application.

v7.0.4.001.43

New Features

- Automatic installation of Cumulative Changes (AMs).

v7.0.4.001.42

Improvements

- Workflows — 'Subsequent assignment through auxiliary fields'.

v7.0.4.001.41

Improvements

- Action List — filtering and sorting.
- CMD digital signing with SCAP professional attributes.

v7.0.4.001.40

Improvements

- Email-sending workflow task — consistency when configuring mandatory requirements by action result.

v7.0.4.001.39

Improvements

- Workflow task 'Classify Document Based on REST Content' — improved classification using poplist-type auxiliary fields.

v7.0.4.001.38

New Features

- Workflow task allowing an email to be sent to an account specified in an auxiliary field.

Improvements

- Mark Documents — management interface.
- Coordinator profile — consistency between the 'Update Revision' and 'Change Info' features.

v7.0.4.001.37

Improvements

- Document insertion.

v7.0.4.001.36

Improvements

- Performance of the Marked Documents interface.
- Search by folder in the workflow task 'Check whether document(s) exist with the value of the reference classification field and associate them'.

v7.0.4.001.35 ✕

v7.0.4.001.34

Improvements

- Document bookmarks — behavior of alerts for groups.
- Document bookmarks — layout.
- Scheduled workflow configuration — selection of entities.
- Landing Pages functionality.
- SOAP and REST APIs — parameters returned in DocumentClassification.

v7.0.4.001.33

Improvements

- Mark Document — option to set recurrence (daily/weekly/yearly).
- iPortalDoc performance — interaction with LDAP.
- Mail Archive — email association using the associated_iddoc tag in the References header.

v7.0.4.001.32

Improvements

- Display of the workflow diagram in +Info when a document has passed through the workflow more than once.

v7.0.4.001.31

Improvements

- PDF templates — calendars.
- Descriptions of XY assignment types.
- Accented characters in iPortalDoc user names.

v7.0.4.001.30

Improvements

- Chronological diagram — display of the Contact in 'Change Info' actions.
- Web services getEntitybyinfo and setEntity — make entity auxiliary fields available.

v7.0.4.001.29

- When requested by Light, allow the displayed template page to contain only the template, without frame borders.

v7.0.4.001.28

Improvements

- Workflow task 'Execute REST Web Service External to iPortalDoc'.
- Newsletters module — adaptation to version v7.0.

v7.0.4.001.27

Improvements

- Newsletters module — adaptation to version v7.0.

v7.0.4.001.26 ✕

v7.0.4.001.25

Improvements

- Workflow task 'Execute REST Web Service External to iPortalDoc'.
- Workflow task 'Automatically Send Document by Email' — additional configuration options.
- New XY assignment type for optional execution states/actions.

v7.0.4.001.24

New Features

- LIGHT — dedicated module: interface with OTP validation, reCAPTCHA v3 and template updates.

Improvements

- Improvements to the Contracts module (Guarantees and Retention).

v7.0.4.001.23

Improvements

- Workflow task 'Search for documents; if any exist, open and associate the most recent'.
- Permissions — workflow listing.
- REST web service executePendingActions.
- Workflow task 'Execute REST Web Service External to iPortalDoc'.
- Code generation and execution of automatic actions when inserting a document.

v7.0.4.001.22

New Features

- CMD digital signing with SCAP professional attributes — Online Counter.

Improvements

- Workflow task 'Document Classification by Extracting Its Content'.

v7.0.4.001.21

Improvements

- REST API for the SOAP method setDocumentClassification.
- 'Insert Document' sub-action — poplist fields.

v7.0.4.001.20

Improvements

- Archive document type — automatic archiving.
- dbdocmails filter functionality.

v7.0.4.001.19

Improvements

- Auxiliary fields — checkbox values.
- SOAP web service API setDocumentWithAuxFields.

v7.0.4.001.18

Improvements

- Document list performance — retrieving column data.
- Workflow task 'Execute Selected Operations on PDF Template' — warning for fields without descriptions.
- Landing Pages — multiple document-type selection.

v7.0.4.001.17 ✕

v7.0.4.001.16

Improvements

- Landing Pages — migration of existing database configurations to the new format.

v7.0.4.001.15

New Features

- REST APIs made available for the SOAP methods executePendingActions and cancelWorkflow.

Improvements

- Group email signature functionality.

v7.0.4.001.14

Improvements

- Web crawlers and Knowledge Units.
- Newsletters module — adaptation to version v7.0.

v7.0.4.001.13

Improvements

- Listing associated documents.

v7.0.4.001.12

Improvements

- SOAP API dedicated to the Contact Center — regular expressions and URL functionality.

v7.0.4.001.11

Improvements

- Task to remove permissions from obsolete revisions.

v7.0.4.001.10 ✕

v7.0.4.001.9

Improvements

- Performance when listing associated documents and assigning permissions.
- Landing Pages — adding landing pages.

v7.0.4.001.8

Improvements

- SOAP API setDocumentWithAuxiliaryFields functionality.
- Landing Pages functionality — document types in the Default Values table.
- Configuration interface behavior when setting 'Approved file/revision and draft in the same window'.

v7.0.4.001.7

New Features

- CMD digital signing with SCAP professional attributes.

v7.0.4.001.6

Improvements

- 'Change document information' functionality — add protection for required fields.

v7.0.4.001.5

Improvements

- Performance of the REST API getDocsByUC().
- Newsletters module functionality — adaptation to version v7.0.
- SOAP API replicate_permissions_user functionality.

v7.0.4.001.4

Improvements

- iPortalDoc Signer plugin functionality — document signing application.
- Document Insertion module functionality.
- Project Management module functionality — insert project.

v7.0.4.001.3

Improvements

- Configuration interface functionality — approved file/revision and draft in the same window.

v7.0.4.001.2

New Features

- iPortalDoc Signer plugin — document signing application (Citizen Card, CMD, smart cards).
- Knowledge Units — management interface.

Improvements

- Landing Page — opening in Safari and loading messages.

- Contracts module — ability to register a contract award.
- Document Insertion module.

v7.0.4.001.1

Improvements

- Action filtering in the action list.
- Workflow task 'Search for documents; if any exist, open and associate the most recent'.

v7.0.4

New Features

- REST API that validates a given LIGHT user's permissions and allows the document to be downloaded.
- REST API that retrieves the document list for a given LIGHT user [External Entity].

Improvements

- Poplists — abbreviations accept spaces.
- Landing Pages — poplists and layout.
- Pending-actions list — mouse-over behavior.
- Minimized list of associated documents.
- Landing Pages — 'Insert Document' type behavior when saving.
- Contracts module — creation of addenda.
- Searching within PDF document content — Firefox browser.
- Bulk execution of personal actions.
- Poplists in the +Info interface — adding a new item with validation against the auxiliary field on which it depends.
- Entities for mail merge when selecting Circular Letter / Mail Merge.
- Workflow task 'Bulk Classification of Documents Associated with a Dossier'.
- Sub-action to send email through the email client.
- 'Reclaim Action' and 'Revert Workflow'.
- Non-recursive customization of columns in the document list for a folder with subfolders.
- 'Schedule Action' functionality.
- Workflow task 'Send document classification to Primavera via web service'.
- SOAP API — GIIM web service / iPortalDoc web service — setDocument.
- Display the current revision in the action interface after updating the document revision.
- SOAP API setDocumentClassification functionality for interdependent auxiliary fields.
- +Info interface — interdependent auxiliary fields.
- 'Change Document Classification' task — Title field.
- 'Check Documents with Pending Actions' task.

v7.0.3.2.001.1

Improvements

- Automatic execution of ad hoc actions older than six months. Notify the user responsible for the action three times to prompt completion.
- 'Stamp PDF with Comment' sub-action — sizing the area where the document can be stamped.

- Workflows — usability of 'Design' and 'Configure' features.
- 'Reclaim Action' functionality.
- Tax Authority (AT) QR-code reading task for invoices: remove PT/pt and leading spaces from taxpayer identification numbers (NIF); handle multiple invoices (N QR codes for different entities) in the same document; correctly read and process the information in the QR code.
- Petri-net routing — ability to cancel user selection.
- Action generator — add and remove ad hoc sub-actions.
- 'Change Document Classification' task.
- Protection of the settings for fields displayed in the pending-actions list.
- Ad hoc actions — configuration.
- Sub-action 'Associate Documents (Predefined Search)'.

Documents

- Change Info via the pencil icon in the +Info window — behavior of mandatory requirements configured in the system.
- Update Document — correct analysis of the document author's permissions when linked to multiple folders in the document hierarchy.
- Update Document — functionality allowing only the latest revision to be saved.
- Insert Document — disable buttons after the first click.
- Associated Documents — hovering over the +Info icon indicates whether associated documents exist, without showing their number.
- Auxiliary fields dependent on higher levels — allow configuration of whether children with the same name and abbreviation may exist under different parents.

Search

- iPortalDoc tabs — when searching documents in a hierarchy tab/folder, the documents returned are always those in the last tab/folder.

Email Reader

- Email replies — autocomplete addresses of users from authentication servers, respecting the filters configured for the authentication server in iPortalDoc.
- Display .p7m emails.

Landing Pages

- Log calls to URLs defined in Landing Pages in the Application Log interface.
- Usability — ability to select items in multiple-choice fields.

Document Types

- Change information for document types already in use.
- Ability to move after a specified time — select a folder with a Year/Month/Day structure.

PDF Templates

- Export templates — text editors and their configurations.

OCR

- Display auxiliary fields in OCR-template configuration.

Email Filter (Dbdocmails Module)

- Classify emails in the document Description and Summary fields.

Contracts Module

- Submit information.

System

- iPortalDoc Stamper — new plugin supporting TLSv1.1+.
- Login/authentication — configurable maximum number of failed login attempts when two-factor authentication (2FA), Citizen Card (CC), or Citizen Card Digital Mobile Key (CMD) authentication is not in use.
- Automatic installation of Manual Changes (AMs).

v7.0.3.2

New Features

- New permissions/flags in profile management.
- 'Move Document with Classification' task — configuration and operation.
- 'Sign with CMD' task — signature positioning.
- 'Sign with Citizen Card' task and 'Sign with CC/CMD/Smart Card' action component — list for selecting associated documents to sign.
- 'Sign with Citizen Card' task — bulk signing up to the highest common page; option for visible or invisible signatures.
- Action component for forwarding a document and its associated documents externally.
- 'Change Document Classification' task.
- 'Execute REST Web Service External to iPortalDoc' task — parameter concatenation and date format.
- 'Classify Document Using AT QR Code Information' task — new QR-code reader.
- 'Check Document Classification' task.
- 'Create Entities Through Document Classification' task.
- 'Classify Document Based on XML File Generated by Kofax ReadSoft Online' task.
- Link Documents functionality — issues related to the Browser profile.
- Dossier document-type configuration.
- MS Office templates.
- Entity/Contact — option to display the Extra Field.
- OCR of documents received through a shared folder and OCR-template configuration.
- Display the insertion date.
- Filter by 'Last day'.
- User validation.
- Evaluations.
- Synchronize users' positions when the authentication server is Local LDAP.

v7.0.3.1

New Features

- Dashboard for workflow and document statistics.
- Email classification and folder hierarchy definition.
- Chronological diagram — information about data changed using Change Info.
- Permission to access shortcuts in the New menu (Macros).
- Document classification based on tags in the email subject now accounts for relationships between auxiliary fields.

- Generate the unique document code based on tags sent in the email subject.
- 'Insert Associated Document' — behavior of assigned permissions.
- Display PDF-template documents in FORM format.
- Document bookmarking — repeat bookmarks with additional users selected.
- Chronological diagram — edit comments.
- Display auxiliary-field items according to active/inactive status.
- Move documents between folders in the document hierarchy.
- Relationships between auxiliary fields when listing entries.
- Automatically select the time when choosing 'Today' or 'Yesterday'.
- Text search (title).
- Access to additional modules (Apps menu) — assigned-permission behavior.
- OCR — interface for validating (exporting) batches/documents and importing OCR templates.
- MyDocs functionality.
- Solution performance.
- REST API — ability to create parameters composed of other document metadata.
- Import PDF templates using different descriptions.
- Use commas in decimal text fields.
- Workflow action types — behavior of 'List of associated documents and their links' and 'List for selecting associated documents to forward as attachments' elements.
- AT QR-code reading task (new QR-code reader) — invoices with N different AT QR codes should generate N PDF documents.
- Comments visible only to specified groups — show comments in the pending-actions list only to users in those groups.
- 'Associate Documents (Predefined Search)' sub-action — new configuration options.
- 'Replace Images in PDF Documents' task.
- 'Classify Document with Auxiliary Fields Based on Entity' task.
- 'Search for Documents; If Any Exist, Open and Associate the Most Recent' task.
- 'Document Classification Using Delimiter and Separator' task.
- 'Document Classification by Extracting Its Content' task.
- “Sign documents using Citizen Card signature” task: bulk document signing; SDK updated to a version compatible with AMA middleware 3.12.0.

v7.0.3

New Features

- Display the previous action’s comment when hovering over the action name.
- Scheduling pending actions.
- Performing actions during absences.
- Alerts for ad-hoc routing to groups.
- Adjusted stamp sizes in PDF files.
- “Classify document using Tax Authority (AT) QR Code information” task — information in the chronological diagram.
- Signing associated documents using CMD and Citizen Card.
- Management and layout of predefined comments.

- “Check Document Classification” task — “Reference” auxiliary field.
- Insertion and layout of states.
- Associate a workflow with a folder.
- Sub-action to associate documents (predefined search).
- “Check Document Classification” task.
- “Execute REST Web Service External to iPortalDoc” task — store extensive responses in auxiliary fields.
- XY assignment.
- “Classify Document Using AT QR Code Information” task — split field G into auxiliary fields.
- “Classify Document Based on REST Content” task — entity management.
- “Document Classification by Extracting Its Content” task — entity management.
- “Classify Documents Using Delimiter and Separator” task — entity management.
- “Automatically Send Document by Email” task — filter by entity classification.
- dbdocmails filters — filter by entity type.
- Double-click emails in the Email Reader.
- LDAP address list (IPBRICK.OS supporting iPortalDoc).
- Correct classification of attachments.
- Search for users on SAML servers.
- Sorting of the entity list.
- Option to maintain the user session.
- Check permissions when inserting documents.
- Search and list auxiliary fields.
- User searches are now case-insensitive.
- Search by document type.
- Text extraction is no longer limited to 1 MB.
- Performance of the User Settings interface.
- License and trial management.
- Log permissions.
- Document search.
- Document Insertion module.
- PDF template generation interface layout.
- PDF templates — decimal-number field.
- Text search.
- Sorting of the “Network” auxiliary field.
- Date filters in tables.
- Layout of auxiliary fields with very large values and special characters.
- History layout.
- Editing public holidays.
- Warehouse permissions.
- Web services interface layout.
- Web services — session duration matches the web interface.

- Inactivity Alert layout.
- Web services — getDocumentClassification.
- Request document permission.
- Document bookmarks.
- “Save As” — interaction with the original document.
- Editing comments in the chronological diagram.
- Chronological diagram layout.
- Change Information layout.
- Document register.
- Templates in dossiers.
- Dates when inserting documents through a shared folder.
- Mark a document as confidential.
- Insert associated document.
- Organization of options in the Document menu.
- Sequences in codes.
- Remove a document from associated documents.
- Notification of the number of bookmarked documents.

v7.0.2.1

New Features

- Management dialogs.
- Document insertion.
- Alerts configured in Action Types.
- Assign actions of the type “Who performed Action X in State Y of Workflow Z”.
- Interface for managing and defining new workflows.
- Multiple selection of criteria based on information received via URL.
- Signatures and information about the email sender.
- Assign a predefined profile when a user is automatically associated.
- MyDocs.
- APIs dedicated to the Contact Center.
- Change user data — email account.
- Statistics — filter by action type.
- Calendar usability in search interfaces.
- Document menu and its options.
- Remove documents using search.
- Mail Merge option.
- PDF templates — ability to insert new documents.

v7.0.2

New Features

- Landing Pages — ability to define context-sensitive URLs between applications.

- MyDocs — area for managing draft files by user.
- Integration with Office 365 Server, similar to the existing WebOffice functionality.
- Document Types — configure retention time for documents classified under a given type.
- Mail Archiving — replies to emails received in a functional account now identify the user who sent the reply as the author.
- Filter pending-action lists by auxiliary fields.
- Pending-action list interface and its functionality.
- Bulk actions — a sub-action mandatory for one result previously prevented bulk execution with another, non-mandatory result.
- Date-type auxiliary-field filters.
- Ad-hoc document routing.
- Configure the hierarchy folder assigned to a workflow.
- Ability to modify actions in the Workflow Generator.
- Workflow action task — invoke an external REST API.
- Configure specific tasks — parameter definitions.
- Task “Execute Selected Operations on PDF Template”.
- Task “Check Document Classification” — add Entity field.
- “Document Classification by Extracting Its Content” task — regular expressions with OR operators.
- Email-sending sub-action — configure From, attachments and subject.
- Ad-hoc signing with Citizen Card and Digital Mobile Key.
- Bulk actions — a sub-action mandatory for one result previously prevented bulk execution with another, non-mandatory result.
- Delete emails associated with documents.
- Reply to emails associated with documents.
- Email signature defined in iPortalDoc (user/group).
- Mail-filter priority.
- Retrieve document-type information.
- Handle documents with special characters in the title.
- Batches received by email — permissions.
- APIs dedicated to integration with the Contact Center solution.
- REST API integration — store the REST request response in an auxiliary field.
- Office 365 plugin.
- Remove iPortalDoc users.
- Configure parameters for automatic completion by the system (Macros interface, etc.).
- Employee auxiliary field — search interface.
- MS Word templates on macOS clients.
- REST API — getLogApplicationAudit.
- iPortalDoc Web App — configuration.
- User permission management — recursion.
- Tablets — browser-access layout.
- User Management — show the server used to authenticate the user.
- User Settings — +Info layout by document type.

- Associate documents.
- Define Macros — CostCenter and SubCostCenter fields.
- Insert documents by drag and drop.
- “Absolute Reader” profile functionality.
- Change Information — via pencil icon.
- Access iPortalDoc document links from an external application.
- Access intermediate document versions created during a workflow.
- Permission to access the “Add Comment” feature.
- +Info interface — mouse-over behavior.
- PDF templates — autosave.
- Generate the Document Register.
- Circular Letters — revision update.
- PDF templates — open a new form after inserting the initial one.

v7.0.1.4

New Features

- Automatic association of emails replied to in iPortalDoc.
- Profile-definition configuration interface.
- Document insertion.
- Added the document “Code” column to this interface.
- Batch management.
- Decimal-field validation.
- Tabs marked as favorites — changes to their names and behavior.
- Access to Contacts and Groupware using HTTPS.
- Security.
- Adapt the “Schedule Events in Groupware” task for the current IPBRICK.OS application.
- Citizen Card signing — list only associated PDF documents.
- AT QR-code reading task.
- “Check Document Existence and Associate” task now supports client-specific auxiliary fields.
- Task for performing operations on PDF templates — now offers the “Clear Field” option.
- Absences — ability to change settings during an ongoing absence.
- Subsequent assignment through Petri-net routing.
- Import workflows — Petri-net constraints; routing via ad-hoc action with a “List for selecting associated documents to forward as attachments”.
- Performance of the “Document Classification by Extracting Its Content” task.
- Forward using an ad-hoc action — send email to all recipients.
- PDF Stamp/Watermark task — now allows previous stamps to be removed.
- New layout.
- Document list performance.
- Document bookmarks — performance improvement.
- Associated Documents interface.

- Entity viewing permissions according to permissions assigned in Contacts.
- Insertion by drag and drop.
- Permission-management interface functionality (removing permissions).
- Macros — define the document insertion folder and configure shortcuts.
- Entity search — allow searching by Contacts auxiliary fields.
- Open XML files with encodings other than UTF-8.
- Permissions to update revisions and change document information for users whose permissions were assigned through document actions.
- Document insertion permissions.
- Link a document to a folder.
- Change Info — correctly apply auxiliary-field permissions.

v7.0.1.3

New Features

- “Allow viewing the total number of associated documents” option.
- Inline document preview.
- Search by user.
- Dossiers — loading dialog.
- Help text for states and actions.
- Ad-hoc action “Read Forwarded Document” — mandatory reading of the document.
- “Schedule Events in Groupware” task — operation with SOGo.
- “Automatically Send Document by Email” task.
- “Execute REST Web Service External to iPortalDoc” task.
- iPortalDoc alias.
- WebApp — profile photo.

v7.0.1.2

New Features

- Ability to define the system email account (iPortalDoc<iportaldoc@“domain”>).
- New “Classify Document Based on REST Content” task; improvements to “Execute REST Web Service External to iPortalDoc” to store response information for use by the new classification task.
- “Create Entity Through Document Classification” task.
- Update a Word-template document through a sub-action.
- APIs — configure a timeout for REST method invocation tasks.
- Search actions when the pending-action list is grouped by document-hierarchy folder.
- Signing task using a scanned signature.
- Sign with Citizen Card — removed the check for 32-bit versus 64-bit Java.
- More configurable fields for the “Send Email Externally” task.
- “Inherit Classification from Associated Document” task now provides access to all application metadata.
- Insert associated document from the Document menu.
- Drag and drop — apply the same classification to N documents.

- View bookmarked documents.
- Update WebOffice-type documents.
- Schedule and cancel document sharing in CAFE.
- Dossier functionality.
- Correct document classification when Contacts changes an Entity into a Contact of another Entity.
- Permission-management interface.
- Search for documents to remove.
- Associate documents without searching.
- Update items in the “Sub-Cost Center” auxiliary field.
- Import items into pop-list auxiliary fields.
- Management interface for the “Works” auxiliary field.
- Email filter — option to associate the email when REF<> is detected.
- New method to retrieve workflow-action information and document classifications.
- New method to insert emails into the iPortalDoc Mail Archive, for example through an MS Outlook plugin.
- In the pending-actions window, colors indicate whether the assigned user has already accessed the action.
- List document titles.
- Display calendars in templates when using Chrome.
- Display very long Entity and Contact names.
- Display footer logos.
- In the interface for customizing columns shown in folders/tabs (document lists), button labels changed to “Save” and “Restore Defaults”.
- Read folder names in the hierarchy.
- Usability of the PDF Template Management interface.
- Document routing when dialogs are used.
- Display root folders in certain application interfaces.
- Automatically cancel queries running longer than X minutes.
- Sign code with a valid certificate — Office templates [macros], Java, etc.
- Associate document types with groups containing many users.
- Search in Mail Archiving.
- Removing hierarchy folders no longer affects Macros.
- Group synchronization through the authentication server now runs in the background.
- Document listing.
- Edit comments in the Chronological Diagram.

v7.0.1.1

New Features

- Task to print labels on a Zebra label printer.
- Task to print labels on a Zebra label printer — QR code plus text (5 cm × 2 cm).
- Routing from a pending action — magnifying-glass search for users.
- Sign documents with the Citizen Card within a workflow action.

- “Check Document Classification” task — make the “Title” parameter available with the same functionality as the Reference and Register auxiliary fields.
- Taxpayer Identification Number (NIF) in user settings (authentication using Citizen Card or Digital Mobile Key).
- View and manage the hierarchy.
- Performance when displaying documents by folder.
- Reply to emails through the iPortalDoc Email Reader.
- Record activity in the application log.
- Budget module.

v7.0.1

New Features

- When extracting attachments, ZIP, 7z or RAR archives can now be unpacked and their files inserted individually as separate documents in iPortalDoc.
- User data — NIF (Taxpayer Identification Number) parameter added to support iPortalDoc authentication using Citizen Card (CC) and Digital Mobile Key (CMD).
- Controlled Copies management.
- Office 365 integration — an Office 365 add-in allows files to be inserted into iPortalDoc.
- REST API — method for inserting documents.
- Users — synchronize positions based on Windows Active Directory information.
- Convert files into native formats beforehand.
- Document search.
- Marked Documents interface.
- Macros — operation of document-title components.
- Security.
- Sign documents using the Citizen Card Digital Mobile Key (CMD).
- Synchronize groups through the authentication server.
- Confidential documents.
- Delete associated emails in the Email Reader interface.
- Classify emails involving entities whose names contain commas.
- Contracts module — display the “Department” field when converting an Award into a Contract.
- Button provided to stop a search.
- Search performance for TO and FROM fields.
- Citizen Card (CC) document signing — compatibility with CC middleware v3.8.0.
- Save the Cost Center auxiliary field.
- Batches inserted through the iPortalDoc web interface are processed in the background.
- Assign actions based on user associations with the Subject, Cost Center, Sub-Cost Center and Employee auxiliary fields.
- Tax Authority QR-code reading task — classification adapted for accounting firms.
- “Automatically Send Auto-Reply Email” task — email message.
- “Check Document Classification” task — configuration layout.
- Absences — perform bulk actions.
- “Move Document with Classification” task — added “Document Type” parameter.

- “Document Classification by Text Extraction” task — choose the parameter identifying the auxiliary field (description, abbreviation, etc.).
- Task to sign documents using a certificate on a smart card/token — select the desired certificate when several are available.
- Document insertion — mandatory auxiliary fields.
- Autosave for PDF-template forms and inability to use Change Info on a document.
- Change Information — pencil-icon behavior.
- Document register.
- Select a document type when many items exist.