Release Notes

iPortalDoc - Document and Process Management

v8.0 to v8.0.001.9

Release notes v8.0.001.5 to v8.0.001.9 [2026-10-27]

v8.0.001.9

New features

- Workflow configuration interface: allows administrators to specify which results are hidden from users.

Improvements

- Landing Pages: configuration interface.
- AI - Knowledge Units: configuration interface.
- Action interface: button display for actions containing the Insert Document sub-action.
- Automatic creation of folders in YYYY/MM/DD format.
- Application performance.

v8.0.001.8

New features

- Document menu: export the Chronological Diagram.
- PDF Template document type forms: when the spellchecker is disabled in the text editor, its context menu is also disabled, allowing users to use the right mouse button for other purposes.
- Move Document with Classification workflow task: can now be configured to save documents in the folder corresponding to the month of the document.
- Automatically Email the Document workflow task: when enabled, the Validate Attachment Size feature issues a warning if attachments exceed the permitted limits.
- Workflow-type actions, Associated Documents block: allows selection of a folder in the Document Hierarchy and displays the available parameters/columns according to its customisation.
- REST APIs: interface providing Swagger documentation and testing tools.
- Download Editable File: a module that makes this option available in the Document menu and allows administrators to specify the document types (Word, Excel and other templates) and users permitted to use it.

Improvements

- Fixed an error when executing external web services using the Primavera Document element.
- Workflow-type actions: frame display settings.
- Landing Page: configuration option descriptions.
- Save As functionality for documents.
- Inserting documents into a dossier.
- Application performance.
- Standardised the terminology used for Date of Preparation and Prepared On.

- CMD (Chave Movel Digital / Digital Mobile Key) signing associated with the Portuguese Citizen Card: corrected document names displayed when signing multiple documents at once.
- Notify All Users Who Participated in the Workflow task: now considers active users only.

v8.0.001.7

Improvements

- Workflow-type Action Manager: action execution when a task updates the document revision.

v8.0.001.6

Improvements

- Exporting advanced search results to Excel.
- Performing bulk actions.

v8.0.001.5

New features

- Workflows: new features for managing and reassigning actions allocated to a user to another user or group.
- Allows specific document types to be excluded from the behaviour of the associated-documents flag (visibility).
- Public Document permission: for document types that can be made public, administrators can now specify which profiles have access to this feature on the document permissions page.
- Workflow Editor: improved usability and the ability to remove rows or columns from the grid layout.
- Pending actions list: displays the Chronological Diagram on mouseover.

Improvements

- downloadPDFUser REST API: inclusion of document metadata (auxiliary fields).
- Action layout: options selected by default when customising the associated documents table.
- PDF Template editor layout.
- Watermarks - PDFWriteText.jar: text colour can be specified in #FFFFFF format.
- Execute a REST Web Service External to iPortalDoc task: JSON formatting.
- Automatically Email the Document task: character escaping.
- PDF Template: fixed missing Update and Preview buttons in the text editor when multiple images were present.
- SAML authentication.

v8.0.001.4

New feature

- Light link for inserting documents via the Intranet Portal.

Improvements

- Document ingestion through the insertion share, with classification via an XML file.
- Email display in the Email Reader.

- PDF Templates: fixed an issue where the PDF was generated correctly but the corresponding XML file was 0 bytes.

v8.0.001.3

New feature

- The document record (Cadastro) feature is now available for documents without a PDF file.

Improvements

- SOAP web services setDocConfidentiality and setDocumentClassification: code adjustments and corresponding error messages.
- Workflow action layout: customisation of the associated documents table.
- Layout: button display.
- PDF Templates: fixed an issue where the PDF was generated correctly but the corresponding XML file was 0 bytes.
- Updating the revision of a PDF Template document after reclaiming the action on the document.

v8.0.001.2

New features

- downloadPDFUser REST API: document metadata is now available.
- Workflows: the Check Document Classification action task now allows document types to be selected.

Improvements

- Bulk classification.
- Inserting MSOffice templates: improved performance.
- WebOffice Templates: fixed an issue when inserting/updating.
- Landing Pages: fields populated with empty values.

v8.0.001.1

New features

- Ability to configure columns in the pending actions list for multiple users.
- Action Generator: elements containing lists of associated documents can now be configured to open in a frame within the action interface.
- New add-on module to configure which users may use group email addresses when sending new emails.
- Filtering functionality (magnifying glass) is now available in the columns of search results lists.
- Document references are automatically included in emails.
- Classify metadata for multiple documents using bulk actions.
- Landing Page: auxiliary fields are displayed in tabular format when inserting a document.
- Action interface, Associated Documents block: allows configuration of the hierarchy folder from which the columns displayed in the document list are obtained.

Improvements

- Inserting documents into a dossier: classification inherited from the dossier.
- Access a Link sub-action: fixed a failure to open the URL in actions configured in earlier versions.

- Access a Link sub-action: security.
- Document record (Cadastro): fixed comments not being visible.
- Knowledge Units: changes to menu behaviour.
- CMD signing: token submission by pressing Enter.
- Workflows: frame behaviour in the Action Generator and action interface.

v8.0.001.0

Improvements

- executePendingActionsGetNextAction() web service.
- PDF Templates: fixed an issue involving the non-breaking hyphen.
- Email Reader: administration interface for updating or removing contacts/email accounts of the Collected Recipients type.
- searchDocuments() web service.
- Recording document opening events in the Application Log.

v8.0

New features

- Layout: each user can synchronise iPortalDoc dark/light mode with the mode used by their browser.
- Each user can configure the colour of their iPortalDoc web interface, the gradient to apply and the contrast level of application text.

Improvements

- Performance and security: updates to the PostgreSQL DBMS, PHP and SAML.
- Updates to the other services provided by the IPBRICK Operating System and used by iPortalDoc.