



## CAPSYS Technologies, LLC

### CAPSYS CAPTURE™ Document Capture

**VERSION 2015 R2**

A July 2016

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#### 1.0 Version 2015 New Features

Note: please refer to the release notes for previous versions of CAPSYS CAPTURE for information about features added in those versions. This release note covers features added in version 2015 and 2015 R2 only. 2015 R2 is a comprehensive roll-up of 2015, 2015 SP1, various hotfixes, and a series of new feature additions to the 2015 framework.

#### Web Client

##### **CAPSYS Redact**

CAPSYS Redact allows for the automatic and semi-automatic redaction of sensitive information on documents through a new Redact tab in the CAPSYS Web Client. The new redaction feature is enabled through licensing and by user rights.

##### **Improved Viewer Control Installation**

The installation of the CAPSYS Viewer Control in the Web Client has been improved and no longer requires administrator rights on the client for installation. **\*\*NOTE: .NET version 4 is required on the client workstation if using HTTP transfer.**

##### **Improved IE Support**

The CAPSYS Web Client no longer requires compatibility mode to be set when running with Internet Explorer versions 10 and 11.

##### **Functional Improvements**

Several bug fixes and enhancements have been made to improve control alignment, HTTP transfer using SSL, page caching and enforcement of batch index field lengths.

##### **Event Viewer Logging (SP1)**

Added Event Viewer logging to QXWflowCS.dll.

##### **IISTraceFile Error Handling (SP1)**

Added error handling for the IISTraceFile registry value check - if it didn't exist a Server error would result.

**Tool Tips (SP1)**

Added additional tool tips in the web client.

**Shortcuts (SP1)**

Added Alt-z shortcut for previous page in web client.

**Server Manager****Pick List Improvements**

Improvements have been made to pick lists to fix comma delimited import of pick list values, and to include TAB and CRLF as valid delimiters.

**Profile Creation Improvements**

The Server Manager now prompts for the name of a new Batch Profile or Document Type as it is created rather than defaulting to "New Process."

**Database Lookup Wizard Improvements - Oracle**

The Database Lookup Wizard now shows Oracle Views.

**General Fixes and Improvements**

Several issues have been fixed that were introduced in version 2015 R2 including user rights, login failures for Active Directory users, recursion when copying fields, date field masks and the date picker control for Batch Index fields.

**QSX Configuration**

Double clicking on a QSX icon will now open that QSX's configuration dialog.

**Batch Profile/Document Type Naming (SP1)**

The user is always prompted for a name when creating a new Batch Profile or Document Type.

**Imported Batch Profile/Document Type Naming (SP1)**

The user is prompted for a name when importing a Batch Profile or Document Type, if the name already exists in the system.

**Add Connection Description (SP1)**

The Add Connection dialog has more descriptive text to explain how it works.

**Audit Log Event Copying (SP1)**

The Audit Log event details dialog now allows copying of the event text.

**Audit Tab Multiple Selection (SP1)**

Audit Tab now allows selecting multiple Severity types.

**Improved User and Audit Tab Scrolling (SP1)**

Scrollbars on the User and Audit tabs now allow seeing all items in long lists.

**QSX Outcome Validation Fixed (SP1)**

Fixed QSX outcome validation. Process maps could be activated even if some required QSX routes were not assigned.

**Assembly Event Fixes (SP1)**

The Create Document option in the Assembly event configuration was not available, even though a default Document Type had been set. The Batch Profile had to be reloaded to see the option.



### **User Tab Fixes (SP1)**

A Quit/Continue error dialog could occasionally be seen when navigating away from the users tab, if no user had focus.

### **Default OK/Cancel (SP1)**

Most dialogs now have a default OK or Cancel button.

### **Server Connection Fallback (SP1)**

Fixed a bug that didn't allow fallback to the CAPSYS Server's connection string when no per-user connections were found in the registry.

### **Web Lookup Configuration (SP1)**

Changed the text on the lookup configuration dialog to show that the full path and filename should be entered for custom .NET lookup modules. COM modules should list the ProgID only.

### **Index Field Reorder (SP1)**

Index Field reordering didn't work properly if an Index Field had been deleted. Reordering a Document Type's Index Fields could also update a Batch Profile's Index Field order, if the Batch Profile and Document Type shared the same ID (and vice versa).

### **Process Activation Logging (R2)**

Activation for Batch Profile and Document Type process maps is now recorded in the Audit Log.

## **Server/System**

### **License Improvements**

The way CAPSYS manages concurrent licenses has been greatly improved, resulting in better performance and preventing clients from losing their license connection during a session.

### **Server Batch Submission Failure (SP1)**

Fixed a bug that could occasionally allow a failed batch submission to improperly create case records. The case records would cause retry errors (case cannot be found in the process data store or the server's working directory), though the Input Source was properly informed of the error, allowing the original batch to be resubmitted to the CAPSYS Server without loss.

### **SQL Database (SP1)**

Increased size of USERIDLIST to accommodate users belonging to really large numbers of Active Directory groups.

### **Dev Kit (SP1)**

Fixed the ProcessXML parameter list for the QWebLookup sample.

### **QSX Module Formats (R2)**

CAPSYS now supports QSX modules implemented as a DLL or EXE written using managed or unmanaged code.

## **QSX Modules**

### **Barcode QSX Improvements**

The Barcode QSX now supports using prefixes with Batch Index Fields.

### **File Import QSX Improvements**

The File Import QSX now supports monitoring one level of subfolders when the "Import files not folders" option is checked.

### **File Import QSX – Folder Name as Owner**

The File Import QSX can use a folder name to set the Batch Owner property. The folder name should be in the format user\_userid, where user is any text, and userid is the userid of the CAPSYS user account.

### **Create Document QSX (SP1)**

Removed datatype validation when copying indexes from a Batch to a Document Case.

### **.NET SetFieldData QSX – Copy Document Index Fields (SP1)**

The .NET SetFieldData QSX now allows copying of Document Index Fields.

### **OnBase QSX (SP1)**

Fixed the Tagged DIP format. TIFF files are in one section. All other files have their own section in the DIP.

### **.NET SetFieldData QSX – Copy Batch Index Fields (R2)**

The .NET SetFieldData QSX now allows copying of Batch Index Fields.

## **1.1 Version 2015 R2 Bug Fixes**

- Server Manager - Fixed a problem with copying fields. Could only copy activated fields.
- Server Manager - Some drop down lists now support auto-completion suggestions.
- Server Manager - Couldn't copy Index Fields that contained an apostrophe in their name.
- Server Manager - Assembly event settings weren't saved properly.
- Server Manager - View active process map didn't properly retrieve Assembly event settings. The Assembly event configuration dialog would show the default settings.
- Server Manager - Changed the Import and Register QSX buttons to open to the QSX folder.
- Server Manager - The properties dialog for process map events now shows editable fields in white.
- Server Manager/Web - Changed how the date is retrieved when completing a queue item so that it works on non-English dates.
- Server Manager - Audit log query failed for date formats other than U.S. Now converted to ISO-8601.
- Server Manager – Fixed issue where Audit Log query returned all records instead of limiting by selected filters.
- Server Manager - Fixed missing activity messages.
- Server Manager - When deleting more than 10000 audit log records, the progressBar.Value property was being set to more than the number of records and throwing an exception.
- Server Manager – Fixed object error when adding local groups.
- Server Manager – Fixed missing account name when adding local users.
- Server Manager – Fixed issue with document zones not saving, affecting zoom-to-zone and OCR.
- Server Manager – Fixed issue with document zones image viewer window sizing.
- Web Client - Document type refresh pulled back all document types, not only those assigned to the batch profile.
- Web Client - Fixed missing horizontal scrollbar when images are zoomed in.
- Web client - Fix for invalid date in client for non-expiring licenses.
- Web Client – Fixed Active Directory Credentials issue.
- Web Client - Fixed DPI settings not saving.
- PDF to Tiff QSX – Changed how TIFF images are generated to fix some compatibility issues.
- Content Manager Release QSX - Fixed an issue where documents could be appended to an incorrect row.
- CAPSYS Fax/FaxCom - changed to out-of-process executable to avoid DEP errors that cause Server Manager to crash.
- Acorde4QSX - Changed to an EXE, fixing an issue where the Stellent login dialog won't load when the QSX is a DLL.
- CAPSYS Fax/RightFax - Install location was not set properly.
- CAPSYS Database - Fixed bug in release batch stored procedure.



## **2.0 Known issues in this release**

### **CAPSYS Upgrade**

#### **CAPSYS Standard User Account Passwords**

When upgrading from prior versions of CAPSYS, existing standard user account passwords will be reset. A password reset utility is available from CAPSYS which will allow all CAPSYS Standard User Account Passwords to be reset to a password set by the CAPSYS administrator. Upon initial login to CAPSYS 4, each user should select a new password.

#### **Re-Import License Files**

When upgrading from prior versions of CAPSYS (3.2 and earlier) the CAPSYS license file must be re-imported or the CAPSYS software will not function properly. A new license file is not needed, but duplicate license files will be issued upon request. Contact your CAPSYS vendor or CAPSYS Support for a replacement license file.

### **CAPSYS Web Client**

**CAPSYS must be a trusted site.** In order to display thumbnails properly, the CAPSYS Web site must be set as trusted site within Internet Explorer, with security set at medium-low or lower.

**NOTE:** The "Allow Scriptlets" permission is no longer required as all scriptlets have been removed from the web client.

**CAPSYS Viewer requires Acrobat Version 8+ or alternative for Viewing PDF Documents.** In order to view Adobe PDF Documents in the CAPSYS Viewer with IE7 or higher, the Adobe Reader version 8 or higher is strongly recommended due to security constraints with earlier versions of the Adobe Reader on IE7. Alternately, CAPSYS has been tested with a free third-party PDF reader available from Foxit Software at <http://www.foxitsoftware.com>.



### 3.0 License File Information

Before CAPSYS can be used, a valid license file must be obtained from CAPSYS Technologies, LLC. If you do not have a license file from CAPSYS, and have already purchased the product, you may contact us at [support@capsystech.com](mailto:support@capsystech.com) to obtain one. If you have not yet purchased the CAPSYS product, please contact us at [sales@capsystech.com](mailto:sales@capsystech.com).

**NOTE:** If you are upgrading from CAPSYS version 3.2 or earlier, you must re-import your license file after upgrading, or the CAPSYS product will not function correctly. If you need a replacement license file, please contact your CAPSYS Authorized Business Partner. If you do not have a CAPSYS business partner, you may obtain a replacement license file by contacting the CAPSYS Support Department at [support@capsystech.com](mailto:support@capsystech.com).

### 4.0 System Requirements

Please visit <http://www.capsystech.com/static.asp?hyperlinkId=3244>

#### **Information on Installing and Upgrading CAPSYS CAPTURE**

Detailed instructions for installing and upgrading the CAPSYS CAPTURE 2015 product are available in the online help library located at: [www.capsystech.com](http://www.capsystech.com) -> Support -> Server Manager Help Files

## 5.0 CAPSYS CAPTURE 2015 Installation

For a new CAPSYS CAPTURE installation, please refer to the topic “New CAPSYS Installation” in the CAPSYS Administrator’s Reference. The CAPSYS Administrator’s Reference is available for download as HTML Help, or as a PDF document.

### 5.1 Upgrading to CAPSYS CAPTURE 2015 from an earlier version

1. CAPSYS CAPTURE 2015 includes many changes to the database schema. A full database backup should be done prior to running the CAPSYS Suite installer.
2. Any Database Lookups using legacy QWebDBPicklist or QWebLookup modules, or custom lookup or validation modules, need to be changed to use the ProgID of the module rather than the name of the WSDL. For example, QWebLookup.IDataExtension should be used instead of QWebLookup.WSDL and QWebDBPicklist.IDataExtension should be used instead of QWebDBPicklist.WSDL. Each Index Field has these settings under the Lookup/Validation settings category.
3. Clients must have .NET 4.0/4.5 pre-installed to support HTTP data transfer (it is only required when the client is using HTTP transfer). The CAPSYS Suite installer will prompt to install .NET 4.0 when installing server components.
4. Web.config by default (look for the comments in the file) is enabled for HTTPS support. The file is located, by default, at C:\inetpub\CAPSYS if you desire to revert back to HTTP only support.
5. Service errors are discussed in this knowledgebase article - <https://CAPSYSsoftwareinc.jitbit.com/helpdesk/KB/View/1659242-service-error>
6. ASP .NET errors are discussed here - <https://CAPSYSsoftwareinc.jitbit.com/helpdesk/KB/View/2138405-asp-errors>
7. Old desktop shortcuts (4.3 and older) for Server Manager won't work. Version 2015 installs a new Server Manager executable.
8. The Web Client control install does not need admin privileges to run. The install is now done per-user, simplifying installation. Limited permissions users should be able to install the control without assistance. Protected mode should be disabled.
9. Settings for Batch Profiles and Document Types are temporary until activated. In CAPSYS 2015 and older versions, only the process map was temporary until activation. Starting in version 2015 R2, changes to Index Fields are also temporary until activation.
10. If upgrading from 4.2 or older versions, and if any FTP Process Data Stores are used, FTPEncrypt.exe must be run. All FTP usernames and passwords are now encrypted. FTPEncrypt.exe can be found in the Support folder where CAPSYS CAPTURE has been installed. Run this utility ONCE, then activate all Document Types and Batch Profiles as the utility updates the design tables only.
11. If upgrading from 2015 or older versions, and the wizard-based database lookup has been used, LookupEncrypt.exe must be run. All lookup connection strings are now stored encrypted. Lookupencrypt.exe can be found in the Support folder where CAPSYS CAPTURE has been installed. Run this utility ONCE, then activate all Document Types and Batch Profiles as the utility updates the design tables only.
12. If upgrading from versions older than 4.0, the PwdReset.exe utility must be run in order to reset all CAPSYS (non-Active Directory) user passwords. The PwdReset.exe utility may be requested directly from the CAPSYS Support Team.
13. QSX modules that were developed using versions of CAPSYS prior to 4.3 must be re-compiled with the CAPSYS 4.3 or later SDK. The Development Kit can be installed using the CAPSYS Setup program.

## **5.2 Deprecation and End of Support CAPSYS CAPTURE 4.3**

### **(Pre SP1) Deprecation Notice**

All versions of CAPSYS prior to and including up to version 4.3 have been deprecated as of March 31, 2015. This means that support for versions 4.3 and earlier are no longer being provided. Version 4.3 SP1 is still a supported version although all ongoing development efforts have been placed within the 2015 framework. All CAPSYS users are highly encouraged to upgrade to version 2015 R2.

### **End of support for Microsoft Products**

- Microsoft XP is no longer a supported operating system for CAPSYS CAPTURE products.
- Microsoft Windows Server 2003 is no longer a supported operating system for CAPSYS CAPTURE products as of June 1, 2015.
- Internet Explorer versions 8 and earlier are no longer supported.

## **6.0 QSX Development**

### **QSX modules developed with previous versions of CAPSYS**

QSX modules that were developed using versions of CAPSYS prior to 4.3 must be re-compiled with the CAPSYS 4.3 or later SDK. The Development Kit can be installed using the CAPSYS Setup program.





## 7.0 Contacting CAPSYS Support

Please report any defects or problems that you find in the software by sending an email to the following address: [support@capsystech.com](mailto:support@capsystech.com).

In the text of your email, please provide all the following information:

- Operating System and Version
- Database Brand and Version (if applicable)
- IIS version (if applicable)
- Internet Explorer version (CAPSYS Web)
- Description of the problem
- Step to reproduce the problem (if applicable)
- Exact text of any error messages displayed
- CAPSYS component in which the error occurred (Server Manager, CAPSYS Web, etc.)

In addition, please attach a trace log file if one was generated. Trace logging can be turned on by setting the following registry key on the computer for which you wish to enable trace logging.

**WARNING! Turning on the trace logging capability will severely impact system performance. It should be used for diagnostics only.**

### CAPSYS Server:

```
HKEY_LOCAL_MACHINE\Software\CAPSYS  
TraceFile = "C:\CAPSYSTrace.log"
```

*Note: The path specified in the TraceFile key above must exist.*

### CAPSYS Web Server/Server Manager:

```
HKEY_LOCAL_MACHINE\Software\CAPSYS  
IISTraceFile = "On"
```

*Note: Starting with CAPSYS CAPTURE version 2015 SP1, trace logging for the CAPSYS Web Service and Server Manager is written to the Windows Event Viewer. The registry key for IISTraceFile should be set to on or off to enable or disable Event Viewer logging. A value of "On" enables logging; any value other than "On" disables logging (default).*

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