

## Autoform DM 10.2 New Features

2022-06-30 - Adam McStravick - Comments (0) - Autoform DM New Features

# Autoform DM

**Release version: 10.2**

**Release date:** 30th June 2022

### **New Features**

This release of Autoform DM builds on the major feature we have been working on over the last few releases – document import. We are also introducing Single Sign-On (SSO), enabling you to authenticate sessions securely and efficiently. Read on to learn more!

#### **Web Document Import (Multiple Batch Support)**

Multiple Batch support means you can now add multiple documents of multiple document definitions, adding flexible import and advanced indexing for bulk workflows.

Building on the foundation of Web Document Import in Autoform DM 10.0 and 10.1, this iteration enables you to import multiple documents of several document definitions at the same time.

Interface changes include a new dialog when importing documents allowing you to arrange them by document definition before importing.

Adding Files

Step 1

Are these files all the same document type?

Yes

*Choose a single document definition for all of these files*

No

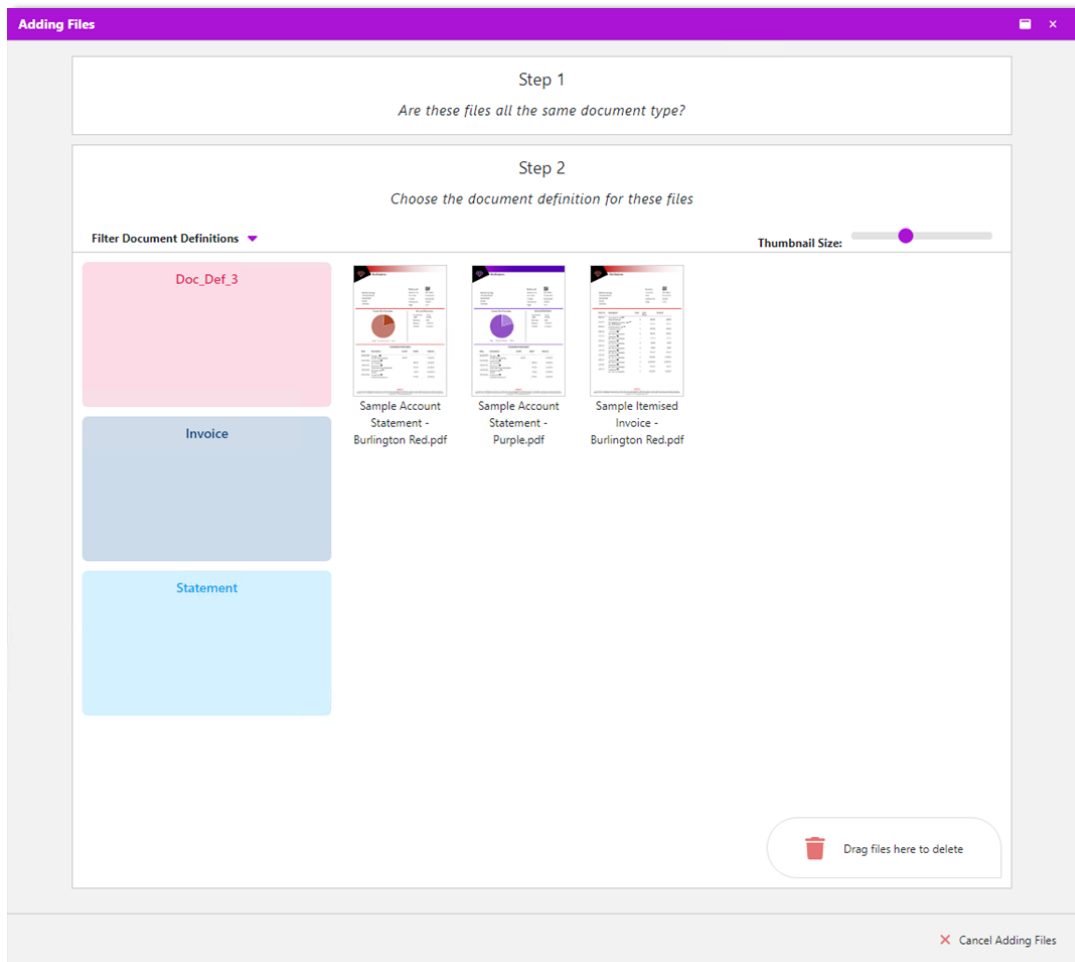
*Specify the document definition for each file individually*

Step 2

*Choose document definition(s)*

Cancel Adding Files



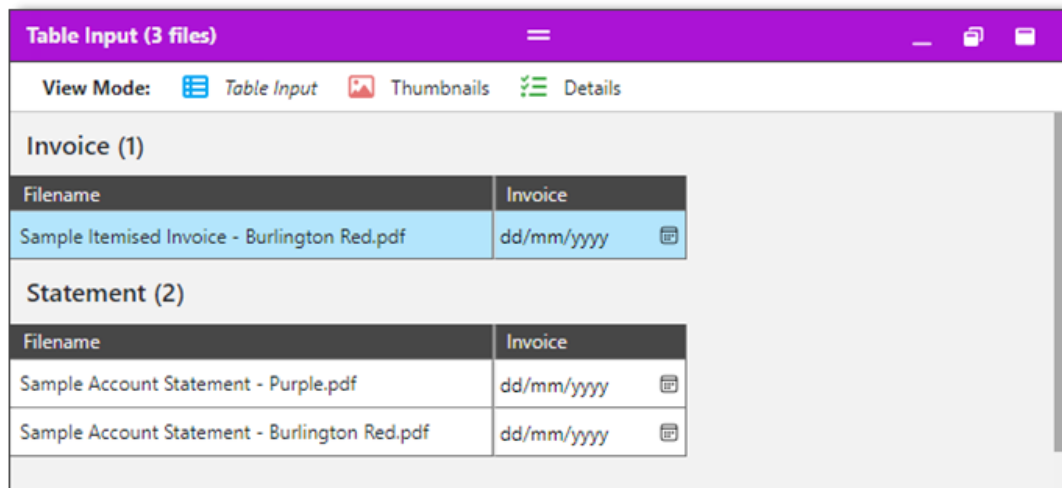


There are also some refinements to the Table Input pane, with resizable tables and the introduction of context right-click menus allowing us to declutter the screen.

There are alternative view modes for the Table Input pane, to display the information in a different way.

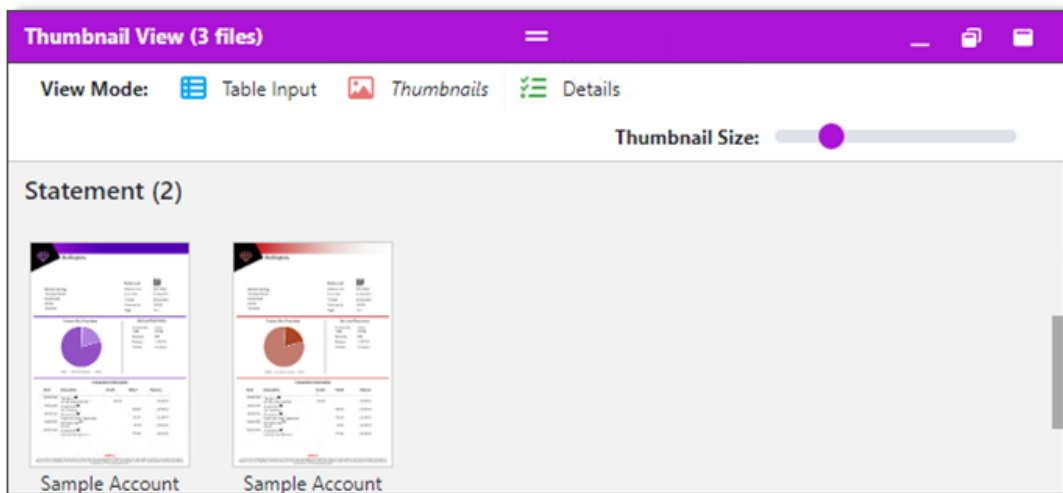
### Table Input

This is the default view that includes document key data and editable fields



## Thumbnails

This view shows resizable thumbnail previews of the documents.



## Details

This view shows additional document metadata.

The screenshot shows a software interface titled "Details View (3 files)". At the top, there is a "View Mode" selector with three options: "Table Input", "Thumbnails", and "Details" (which is selected). Below the header, the main content area is titled "Invoice (1)" and contains a table with the following data:

Filename	Known Path	Last Modified	Size	Filetype	Errors
Sample Itemised Invoice - Burlington Red.pdf	Sample Itemised Invoice - Burlington Red.pdf	2021-10-22 14:42:39	0.17 MB	pdf	0

Below the "Invoice (1)" section, the main content area is titled "Statement (2)" and contains another table with the following data:

Filename	Known Path	Last Modified	Size	Filetype	Errors
Sample Account Statement - Purple.pdf	Sample Account Statement - Purple.pdf	2021-10-22 14:45:10	0.13 MB	pdf	0

It is also possible to use regular expressions to constrain the input format of default values, when configuring a document import application.

You can edit applicable values directly in the table, or in the Key Input pane as before. The table pane can be resized as preferred, or to preset positions.

These features further our goal to permanently move away from thick-client solutions, migrating customers to our hassle-free web front-end. As always, integration will remain at the heart of our implementation, ensuring the new functionality is available from your core systems.

## Key Benefits

- Categorize, index and archive multiple batches of documents more efficiently than ever before

- Directly accessible from your third-party applications
- Replaces thick-client app installs for common use-cases

### **Single Sign-On (SSO)**

The new SSO feature introduces first class support for integrating the Autoform DM product into a Single Sign-On authentication environment.

Autoform DM has, for a long time, supported integration into existing user directories via LDAP. Whilst this allows for centralizing user and group management into systems such as Active Directory and the sharing of account credentials across the application, it still requires the user to manage the application login lifecycle separately.

The introduction of support for the KeyCloak product, an external identity management system, greatly expands the authentication possibilities and allows for seamless Single Sign-On within a corporate environment. Using either KeyCloak directly to manage users or linking it to a service such as Azure Active Directory provides the same centralized account management features, but with less overhead for the end user.

#### **Key Benefits**

- Adds support for utilizing identity providers such as Azure AD
- Enables users to seamlessly switch between Autoform DM and other applications without having to log in multiple times

### **Documentation Updates**

#### **Support Portal**

Look out for useful Article and Guide content that helps you use Autoform DM. We will continue to do add new pages and update content, to ensure your experience using our software is easy and enjoyable.

Recent documentation updates include:

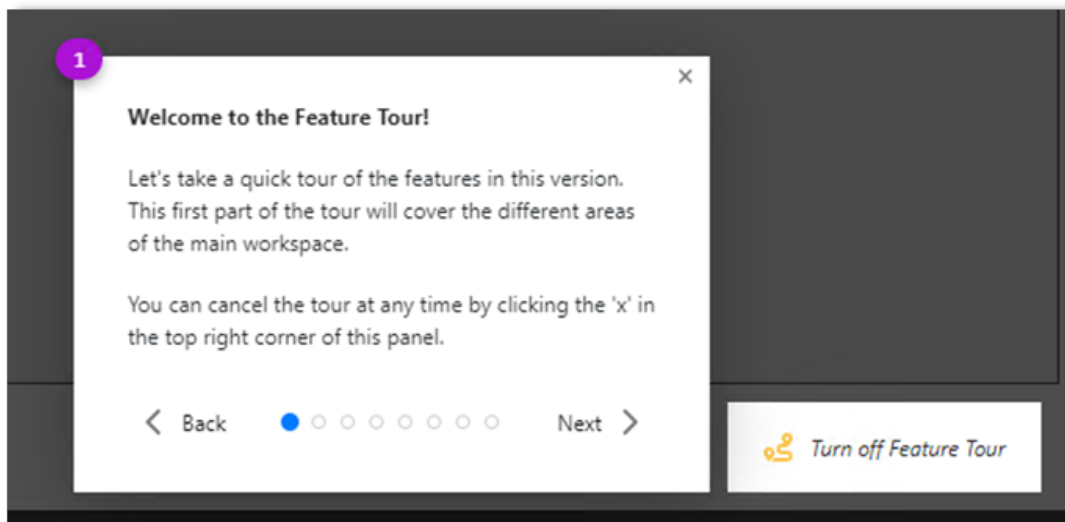
- Document Import (10.2)
- System Requirements
- FAQ Articles
- FormBytes video: How to use the Document Import tool

A FormBytes video on the new features is in the pipeline and will be released onto the support portal soon!

#### **Feature Tour**

The new Feature Tour will help get you quickly up to speed with the changes to Document Import included with this release.

Click the **Launch Feature Tour** button to walk through the on-screen help.



You can toggle the Feature Tour on or off at any time by clicking the button.

#### Related Content

- [Autoform DM 10.2 Released!](#)
- [Autoform DM 10.2 Release Notes](#)
- [Video: How to use the Document Import tool](#)
- [Autoform DM 10.2.0.exe](#)