



# FileHold

Document & Record Lifecycle Software

**FILEHOLD 12 NEW FEATURES GUIDE**

**VERSION 12**

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## 1. OVERVIEW

This document describes the new features and enhancements made to the FileHold 09 release.

## 2. OFFICIAL LOGO FOR FILEHOLD 12

The official logo was decided on as a multiple choice vote by the members of the FileHold management team. The logo will be used on the FileHold website or any marketing documentation relating to the release of the product. The logo is not included in the GUI of the applications (FDA or Web Client) or the installers.

The logo is as follows:



## 3. NEW FEATURES AND ENHANCEMENTS

The new features and enhancements described in the following sections contain mostly those relating to end user features since back-end changes are not seen by your typical user.

### 3.1. SYSTEM REQUIREMENTS

There are added system requirements for FileHold 12.

#### 3.1.1. Application Server Requirements

Existing installations only:

- Windows 2003 SP2 Standard and Enterprise Edition Server (32 bit and 64 bit) with IIS 6
- Windows 2003 R2 Standard and Enterprise Edition Server (32 bit and 64 bit) with IIS with SP2 (if applicable)

New installations only:

- Windows 2008 Standard and Enterprise Edition Server (64 bit) with IIS 7
- Windows 2008 R2 Standard and Enterprise Edition Server (64 bit) with IIS 7

#### 3.1.2. Database Server

- SQL Server 2005 SP2 Enterprise (32 bit)
- SQL Server 2005 SP2 Standard (32 bit and 64 bit)
- SQL Server 2005 Express (32 bit)
- SQL Server 2008 (64 bit)

- SQL Server 2008 R2 (64 bit)
- SQL Server 2008 Express (64 bit)

### 3.1.3. Web Browser Support

- Internet Explorer 7.x , 8.x and 9.x (32 bit and 64 bit)
- Mozilla FireFox 3.5+
- Safari 5.1 (tested on Windows only)
- Google Chrome 8.x+

With the addition of the Safari browser, there is a new behavior for all web browsers when using the **Back** button. The default number of web pages to be kept in any (IE, FF, Safari, Chrome) browser's memory is five. If you try to click **Back** more than 5 times and then attempt to perform a function, you will receive a message that you need to repeat the last operation. The default amount of time that the web pages are cached is set to 15 minutes. The default values can be configured in the web.config file.

### 3.1.4. FDA Operating System

- Windows XP SP3 (32 bit)
- Windows Vista SP2 (32 bit and 64 bit) – Top 3 editions
- Windows 7 SP1 (32 bit and 64 bit) – Top 3 editions

### 3.1.5. Microsoft Office Support

- Microsoft Office Professional 2003 (Outlook, Word, Excel, PowerPoint, Visio)
- Microsoft Office Professional 2007 (Outlook, Word, Excel, PowerPoint, Visio)
- Microsoft Office Professional 2010 (Outlook, Word, Excel, PowerPoint, Visio, OneNote)

### 3.1.6. Microsoft SharePoint Support

- Microsoft Office SharePoint Server 2007 (32 bit and 64 bit)
- Microsoft Windows SharePoint Services 3.0 (32 bit and 64 bit)
- Microsoft Office SharePoint Server 2010 (64 bit)
- Microsoft SharePoint Foundation 2010 (64 bit)

## 3.2. LIBRARY ADMINISTRATION FUNCTIONS IN FDA

Selected Library Administration functions from the Web Client have been added into the FileHold Desktop Application (FDA) in order to make certain features more accessible for administrators without having the need to leave FDA and log into the Web Client.

The Library Administration features added to the FDA include:

- Schema management — Schemas, Metadata fields, events and document and version control number fields
- Workflow — Workflow templates and the Workflow Status Report.

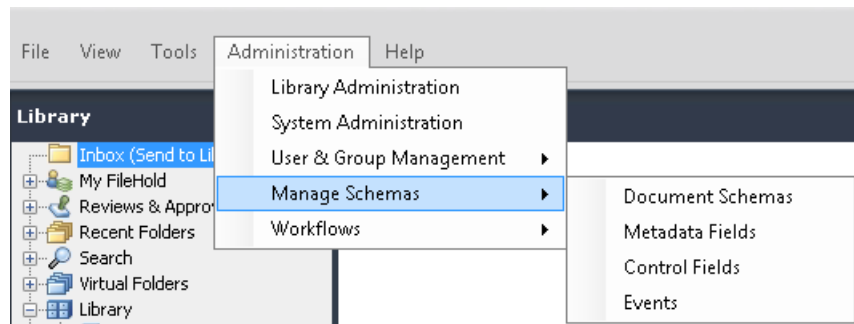
These functions work fairly similarly to the original Web Client functions. Any differences will be noted in this document.

### 3.2.1. Schema Management

The schema management functions are accessed in FDA using the menu bar **Administration > Manage Schemas**.

You can perform the following schema functions:

- Manage document schemas
- Manage metadata fields
- Manage control fields
- Manage event schedules

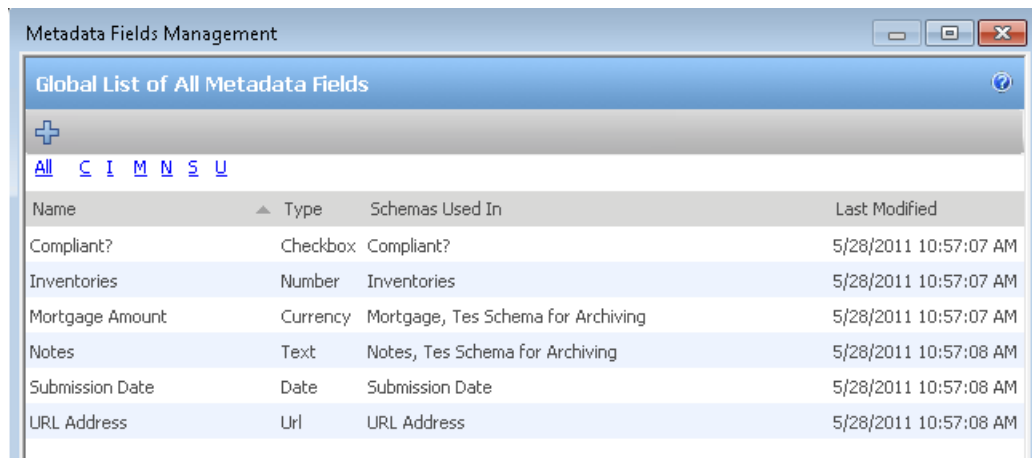


In the Schema Management window, you can edit an existing value by clicking on the name or create a new one using the **Add** button (+). You can edit an existing schema by clicking on the schema name.

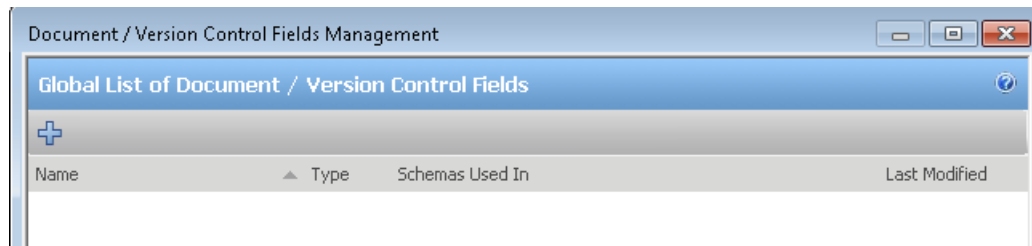
 A screenshot of the 'Schemas Management' window. It features a title bar with standard window controls. Below the title bar is a header 'List of Document Schemas' with a plus sign icon and a help icon. Underneath is a toolbar with a plus sign and a set of filters: All, C, I, M, N, S, I, U. The main area contains a table with the following data:
 

Name	Type	Description	Last Modified	
Compliant?	Electronic Document		6/2/2011 1:45:56 PM	✘
Inventories	Electronic Document		5/28/2011 10:57:09 AM	✘
Mortgage	Electronic Document		5/28/2011 10:57:09 AM	✘
Notes	Electronic Document		5/28/2011 10:57:08 AM	✘
Submission Date	Electronic Document		5/28/2011 10:57:09 AM	✘
Tes Schema for Archiving	Electronic Document		6/2/2011 5:28:04 PM	✘
URL Address	Electronic Document		5/28/2011 10:57:09 AM	✘

In the Metadata Fields Management window, you can edit an existing value by clicking on the name or create a new one using the **Add** button (+). You can edit an existing metadata field by clicking on the field name.



In the Document/Version Control Fields Management window, you can edit an existing value by clicking on the name or create a new one using the **Add** button (+). You can edit an existing control field by clicking on the name.

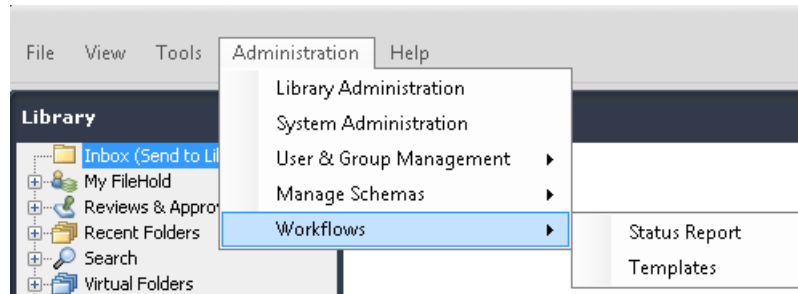


In the Events Management window, you can edit an existing value by clicking on the name or create a new one using the **Add** button (+). You can edit an existing event by clicking on the name.

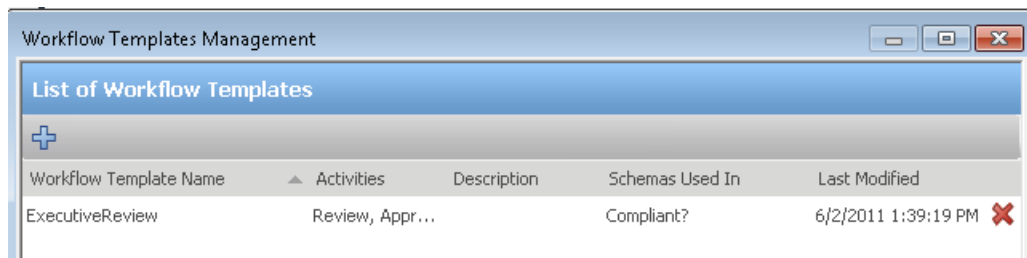


### 3.2.2. Workflow Library Administration Functions

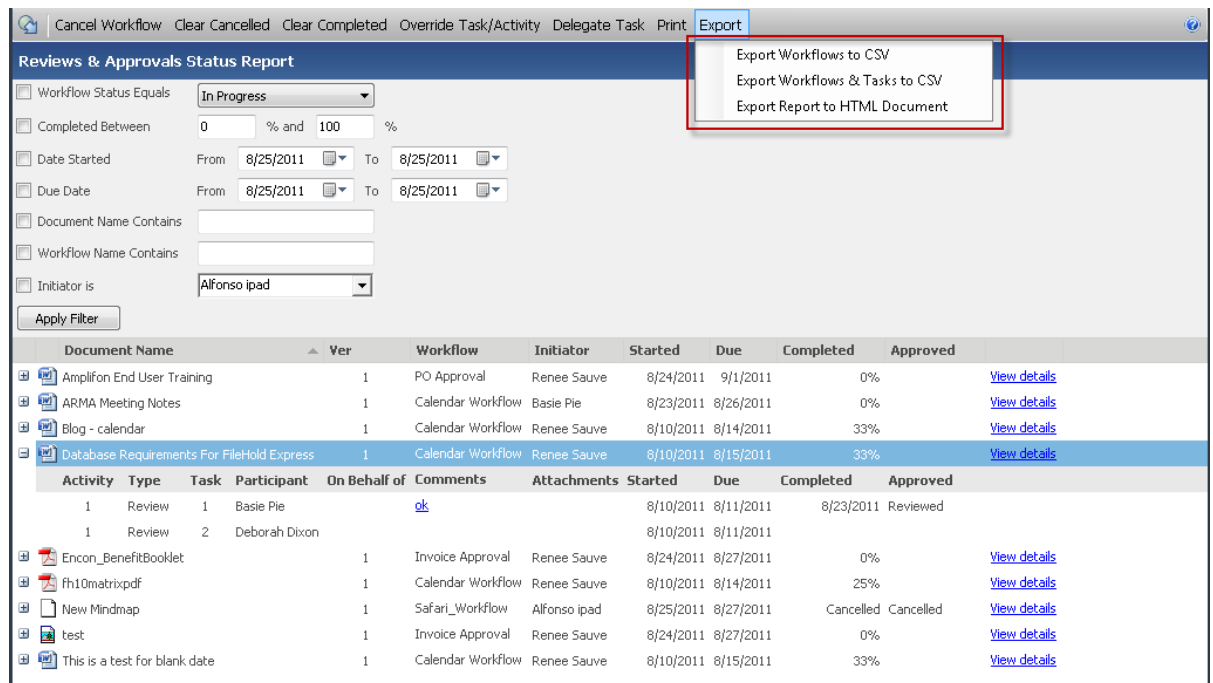
The workflow management functions are accessed in FDA using the menu bar **Administration > Workflows**.



In the Workflow Template window, you can edit an existing template by clicking the name or create a new one by clicking the **Add** button (+). Edit an existing workflow template by clicking on the name.



The Workflow Status Report can be run and exported from FDA. When exporting the report, you can choose to export only the workflow or you can include both the workflows and the tasks. The report can be exported to CSV or HTML. Further enhancements have been made to the [Workflow Status Report](#) which can be read in the [Workflow Improvements](#) section.



A report of only the workflows:

	A	B	C	D	E	F	G	H
1	Document Name	Ver	Workflow	Initiator	Started	Due	Complete	Approved
2	business1	1	Executive	Jacek Lipo	6/2/2011	6/3/2011	50%	
3	Read-1st-FileHold_Systems_Win2008-x64bit-Server_	1	Executive	Jacek Lipo	6/2/2011	6/3/2011	25%	
4	Source Control Organization Document	1	Executive	Jacek Lipo	6/2/2011	6/4/2011	0%	
5	Test TIFF and PDA	1	Executive	Jacek Lipo	6/2/2011	6/4/2011	25%	

A report of workflows and tasks:

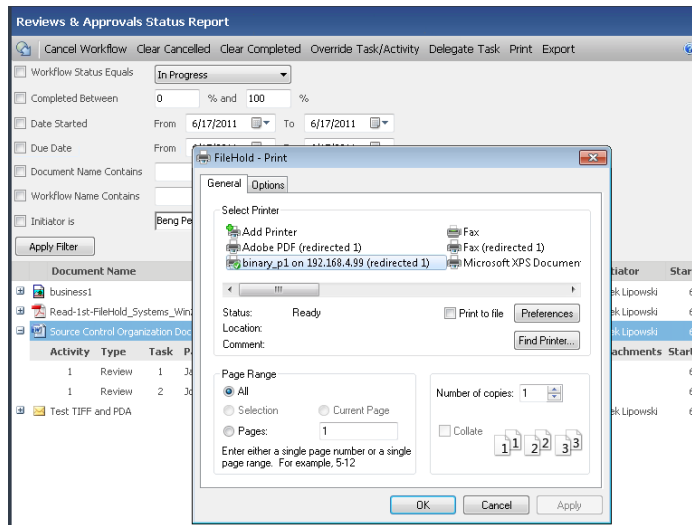
	A	B	C	D	E	F	G	H	
1	Document Name	Ver	Workflow	Initiator	Started	Due	Complete	Approved	
2	business1	1	Executive	Jacek Lipo	6/2/2011	6/3/2011	50%		
3	Read-1st-FileHold_Systems_Win2008-x64bit-Server_Preparation_Version_6_1A-Oct-2010	1	Executive	Jacek Lipo	6/2/2011	6/3/2011	25%		
4	Source Control Organization Document	1	Executive	Jacek Lipo	6/2/2011	6/4/2011	0%		
5	Activity / Type / Task / Participant		On Behalf of	Comment	Attachme	Started	Due	Complete	Approved
6	1 / Review / 1 / Jacek Lipowski					6/2/2011	6/3/2011		
7	1 / Review / 2 / Joey Siopongco					6/2/2011	6/3/2011		
8	Test TIFF and PDA	1	Executive	Jacek Lipo	6/2/2011	6/4/2011	25%		

An example of an HTML version of the report is shown below. Note that to print the tasks within a workflow, the workflow must be expanded in the Workflow Status Report results.

### Workflow Status Report

Document Name				Ver	Workflow	Initiator	Started	Due	Completed	Approved
Blog - calendar				1	Calendar Workflow	Renee Sauve	8/10/2011	8/14/2011	0%	Approved
Activity	Type	Task	Participant	On Behalf of	Comments	Attachments	Started	Due	Completed	Approved
1	Review	1	Basie Pie				8/10/2011	8/12/2011		
1	Review	2	Deborah Dixon				8/10/2011	8/12/2011		
Database Requirements For FileHold Express				1	Calendar Workflow	Renee Sauve	8/10/2011	8/16/2011	0%	
fn10matrix.pdf				1	Calendar Workflow	Renee Sauve	8/10/2011	8/14/2011	0%	
This is a test for blank date				1	Calendar Workflow	Renee Sauve	8/10/2011	8/16/2011	0%	

The Workflow Status Report can also be printed using the [Print](#) button.

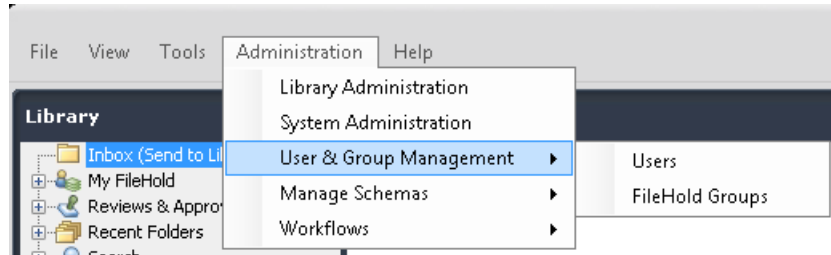


### 3.3. SYSTEM ADMINISTRATION FUNCTIONS IN FDA

The User and Group Management functionality has been added to the FDA in order to make certain features more accessible for administrators without having the need to leave FDA and log into the Web Client.

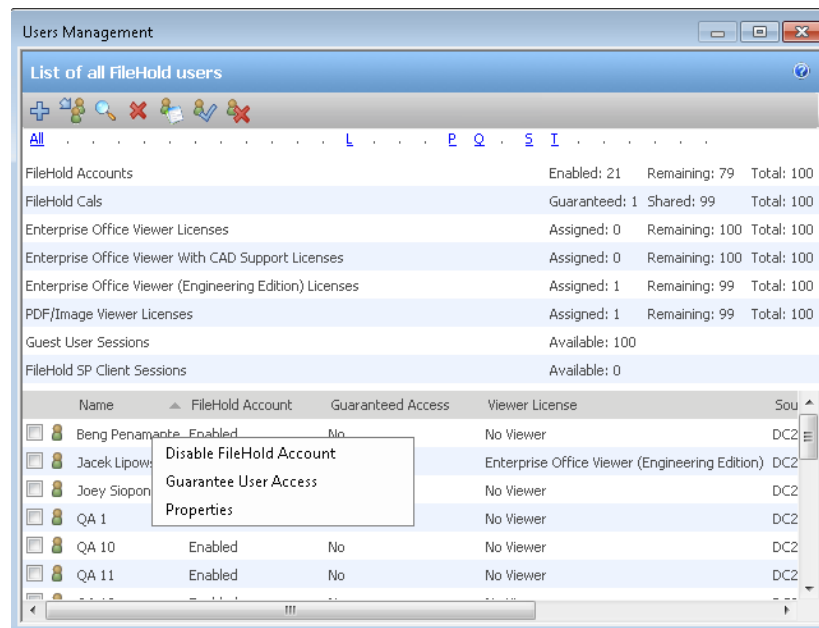
The System Administration features added to the FDA include:

- Users
- FileHold Groups



The Users Management window allows you to:

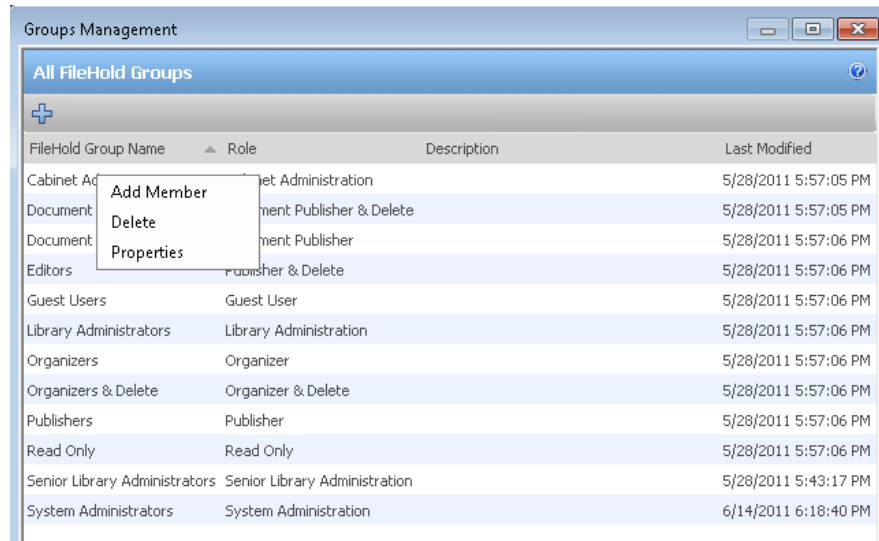
- Add users
- Add users to groups
- Search users
- Delete users
- Set a viewer license
- Enable an account
- Disable an account
- Set guaranteed user access
- View user properties



In the Groups Management window, you can:

- Add groups
- Add members to groups

- Delete groups
- View group properties



All of the administration functions in FDA are performed almost exactly as they are in the Web Client.

### 3.4. FILEHOLD PDF/IMAGE VIEWER

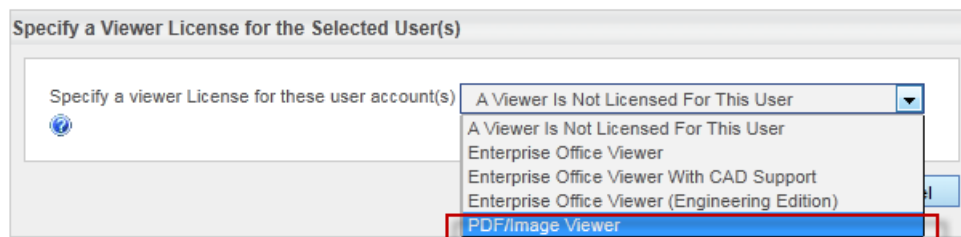
A new viewer, called the PDF/Image viewer, is available that supports the following file formats:

- PDF
- TIFF (single or multi-page)
- Image files (jpg, png, gif, bmp)

Both the traditional Brava viewer and the Simple viewer are available for purchase with FileHold 12. If the Brava viewer is purchased, customers will also receive the PDF/Image viewer at no additional cost.

If a viewer license is assigned to the user, the Document Viewer icon can be used with both the Brava viewer and the PDF/Image viewer in FDA. If a user is assigned a Brava viewer license, they can also use the PDF/Image viewer with the Brava viewer being the default viewer. If a user is assigned a PDF/Image viewer license then they will only be able to use the viewer for documents with the file extensions listed above.

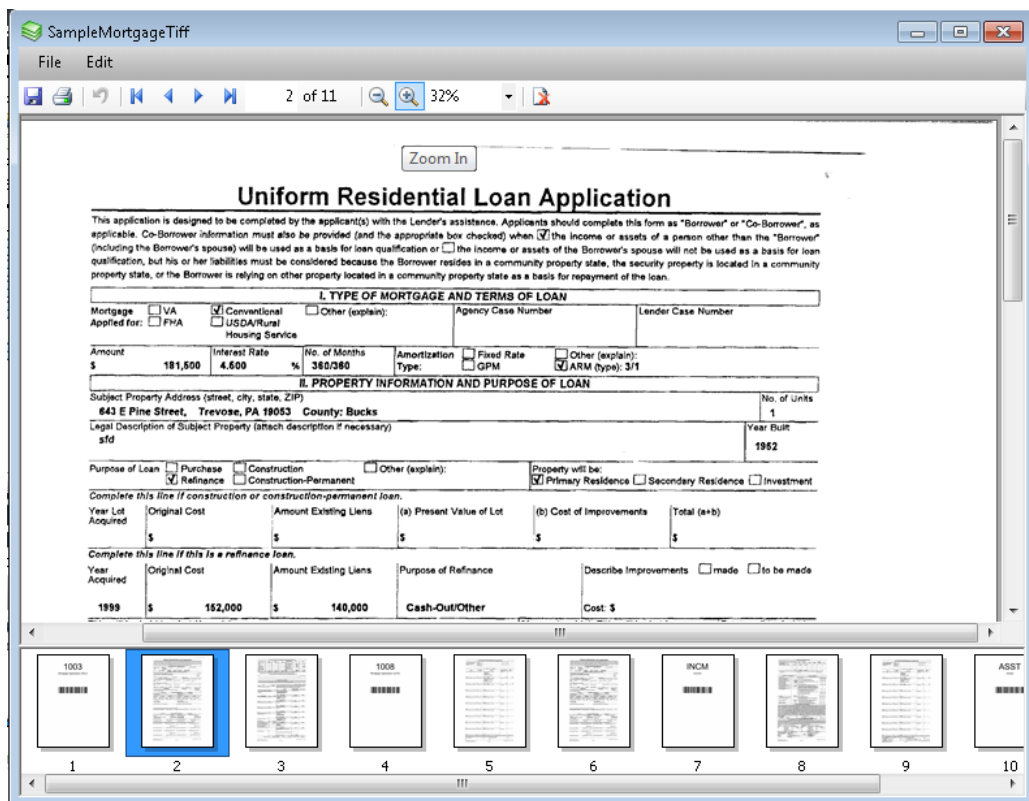
You can assign the user a license in [System Administration > Users > Set Viewer License](#).



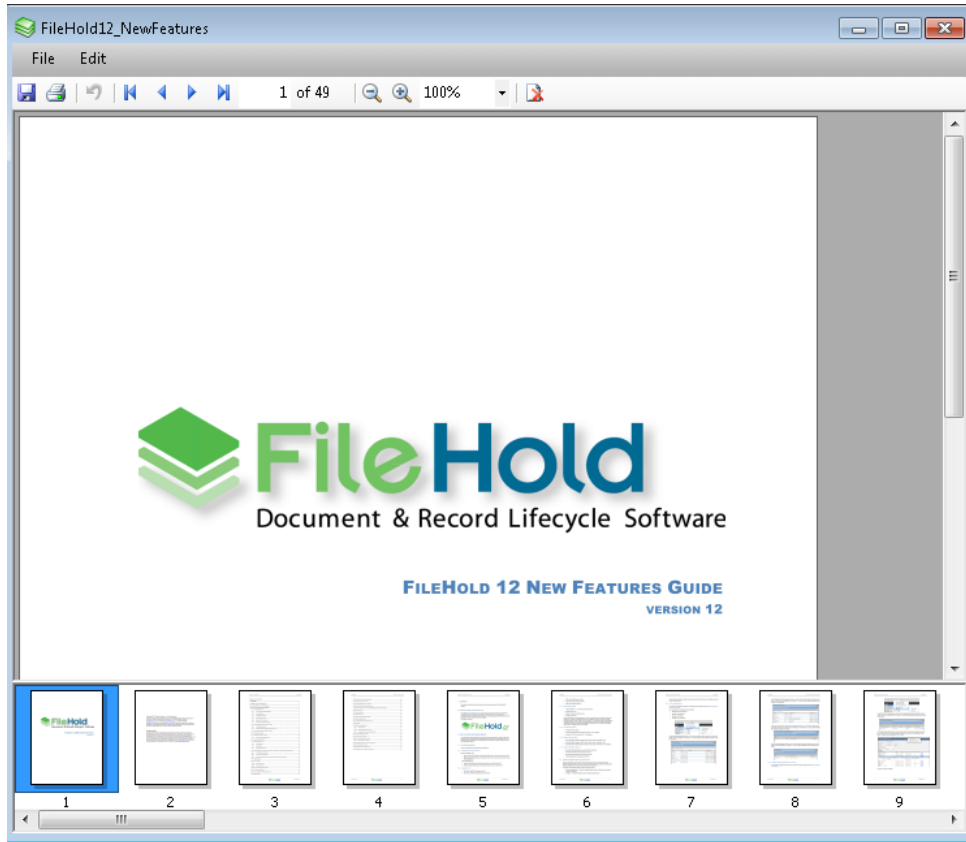
With the PDF/Image viewer you can:

- Open documents in FileHold or from your local computer.
- Open multiple documents at a time. Each file is shown on a separate tab. This capability was also added to the Brava Viewer.
- Reorganize pages of a PDF or multi-page TIFF image.
- Append an image to the current image file.
- Append a TIFF file (single or multi-page) to another TIFF file.
- Insert an image from one image file to another image file using drag and drop.
- Delete pages.
- Select multiple pages of the document.
- Saved the altered document to FileHold or to your local machine as a PDF, JPEG, or TIFF only.
- Print the document.
- Undock the viewer so it is in its own window.
- View thumbnails of a multi-page document.

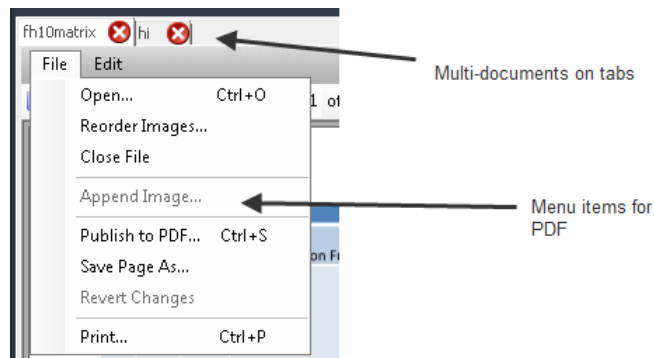
A sample of a multi-page TIFF file:



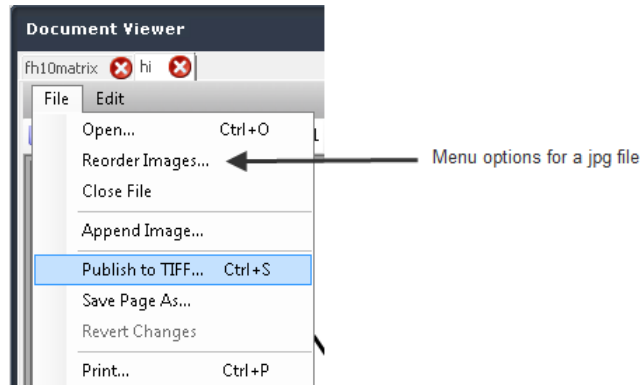
A sample of a PDF file:



A sample of the multiple documents on separate tabs and the menu items for a PDF file on a tab.

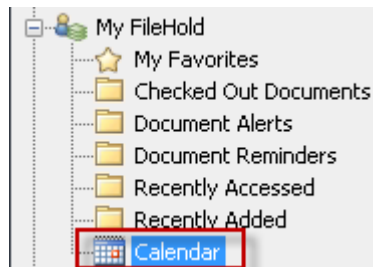




A sample of the multiple documents on separate tabs and the menu items for an image file on a tab.



### 3.5. MY FILEHOLD CALENDAR

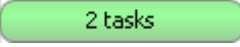




The Calendar is shown in the My FileHold area of the Library tree in the FileHold Desktop Application (FDA). The Calendar is not available in the Web Client.



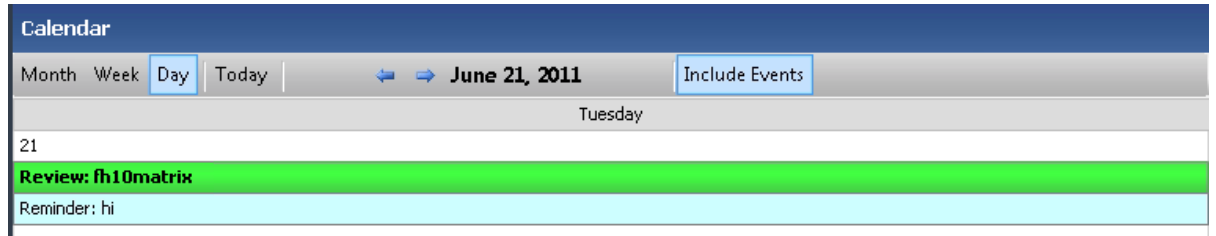
The Calendar can be viewed by the Month, Week, Day, or today (current date). You can also scroll through the months, weeks, days, and years using the scroll arrows  . Click **Today** to bring you back to the current date (today's date).

Calendar						
Month	Week	Day	Today	← → August, 2011		
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
8	9	10	11 1 reminder	12	13 4 events	14
15 6 events	16	17	18 1 reminder	19	20	21
22	23 2 tasks	24 2 tasks (1) 1 reminder	25 2 reminders (2)	26 2 tasks (2) 1 reminder	27 1 reminder	28 1 reminder
29 1 reminder	30 1 reminder	31 1 reminder	1	2	3	4

The calendar displays the following:

- Active, overdue, and completed workflow tasks.
  - Completed tasks are in a light green background. 
  - Due tasks are in a green background with bold text and then number of tasks due in brackets. 
  - Overdue tasks are shown in red with bold text and the number of overdue tasks in brackets. A task is considered overdue the day after the task is due.  Note that this shows that there is only one task overdue but two tasks were due on that day. Only one task was completed.
- Past, current, and future reminders. The Reminders listed in the My Reminders view are considered current.
  - Displayed in cyan background. Active reminders that have not been marked as read are bolded with the number of active reminders listed in brackets (). 
  - Active reminders that have been marked as read will be unbolded. Only the current days' reminders are considered active. Lapsed and future reminders are not active. 
- Scheduled events when the **Include Events** button is selected. Only users with Library Administrators roles and above can access this feature. Events are for when documents are set to be archived, converted to a record, or disposed.
  - Displayed in yellow background.

You can click on a day in the Month or Week view to see the details for the day:



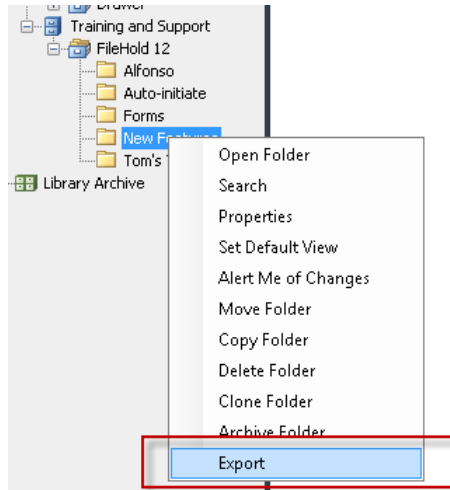
You can also click on a task or a reminder in the Day view to open the document in the [My Tasks](#) view for tasks or in the [My Document Reminders View](#) for reminders.

### 3.6. EXPORTING DOCUMENTS IN FDA

You can export documents from a cabinet, drawer, folder groups, or folders using the Export function. You can also export one or more documents from within a folder. Once the Export command is selected, you can select where you want to export the documents such as your local computer or network location.

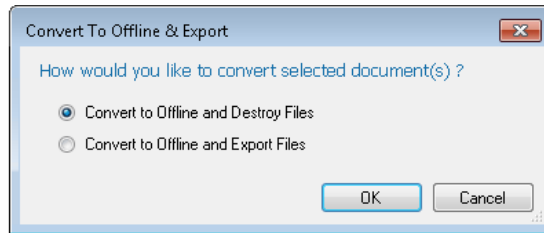
The documents are exported with an XML file and a folder of the documents in their native format. The XML file stores the metadata, schema name, and library location of all the selected documents in FileHold compatible format. This allows for the easy importation of the documents back into the document management system. For example, if you are exporting documents out of a demo system and importing them back into a production system.

Exporting can be done by users with a Document Publisher role or higher if they have access to them.



#### 3.6.1. Exporting Offline Documents

When converting documents to offline documents, you can select to export the files or destroy the files. Once the documents are exported, the documents are converted to offline. You can only convert documents to offline if you are a Library Administrator or higher.

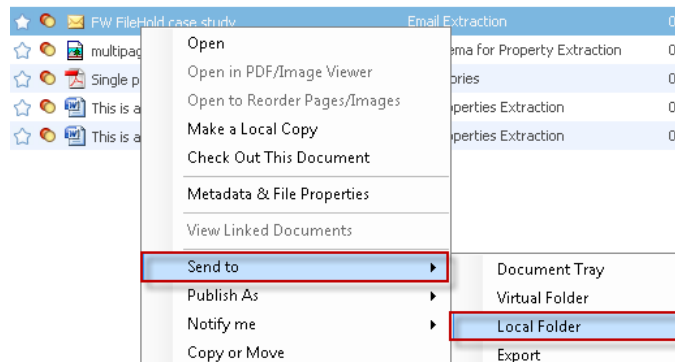


An XML file storing the metadata of all the selected documents in FileHold compatible format will be stored in the export location. This allows for the importation of the documents back into the document management system.

### 3.7. DOWNLOADING DOCUMENTS TO A FOLDER

The contextual **Send to > Local Folder** command can be used to download one or more documents to a location that can be selected.

This differs from the **Get a Copy** command as getting a copy downloads the documents automatically to the My FileHold Documents location.



**NOTE:** As a reminder, you can also download and zip up multiple documents using the **Download as Zip File** command. The zipped file is automatically downloaded to My FileHold Document folder.

### 3.8. MANAGE IMPORTS TOOL

There are several enhancements to the Manage Imports tool.

- Sharing Imports and Inboxes – Shares imports of documents and the contents of the FileHold Inbox between users with differing Windows user accounts.
- Moving imported files – Files that have been imported can be moved to another location on your computer or network.

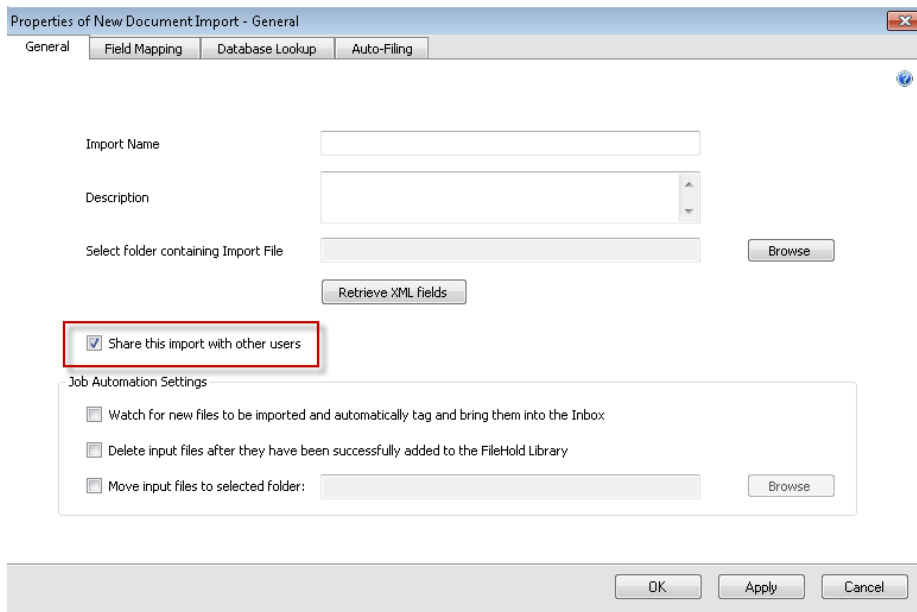
#### 3.8.1. Shared Imports

Shared Imports can be used when 2 or more users share a local computer and have differing Windows user accounts. When Shared Imports is enabled, any documents that are imported into FileHold will be seen in the Inbox of all Windows users of the local computer. This allows different users to file the documents after they have been imported into FileHold or to alternate importing duties.

In older versions of FileHold, the imported documents in the Inbox could only be viewed by one local user, in other words, they could not be seen by other users that have logged on to the computer. In FileHold 12, all Windows users of the same computer can share imports but each user must have a valid FileHold account.

For example, User Mary and User John both work at a scanning station on the same computer during various times each day. Each user has a separate Windows user accounts that they use to log into the scanning station. User Mary logs into the computer with her user account and scans a bunch of documents. These documents are imported into FileHold using the Import tool. User Mary then logs off the computer. User John then logs into the computer using his Windows user account. He opens FileHold. The imported files that User Mary scanned in are in his Inbox and can now be filed into the Library. John can then continue scanning and filing. Note that User Mary will need to share her Inbox for User John to see them.

To enable Shared Imports in FDA, go to **Tools > Manage Imports**. The **Share this import with other users** check box is selected by default.



You can set whether you want to share your Inbox in the FDA Connection Options window.

The screenshot shows a dialog box titled "Connection Options for renee". It is divided into two main sections: "Logon Settings" and "FileHold Server Settings".

**Logon Settings:**

- Automatically run FileHold application when I logon to Windows
- Automatically logon to FileHold Library when Desktop Application starts
- Remain logged in even if no activity is performed
- Always prompt for credentials
- Use my windows account username and password to logon
- Use the following username and password to logon

Below these are input fields for "Username" (renee), "Password" (masked with dots), "Password (confirm)" (masked with dots), and a "Default domain" dropdown menu (DC2008) with a "Refresh" button.

**FileHold Server Settings:**

- FileHold Server URL: http://192.168.4.111/FH/FileHold
- Maximum simultaneous transfers: 1
- Share my Inbox with other users (highlighted with a red box)

At the bottom are buttons for "Test URL", "Test Logon", "OK", and "Cancel".

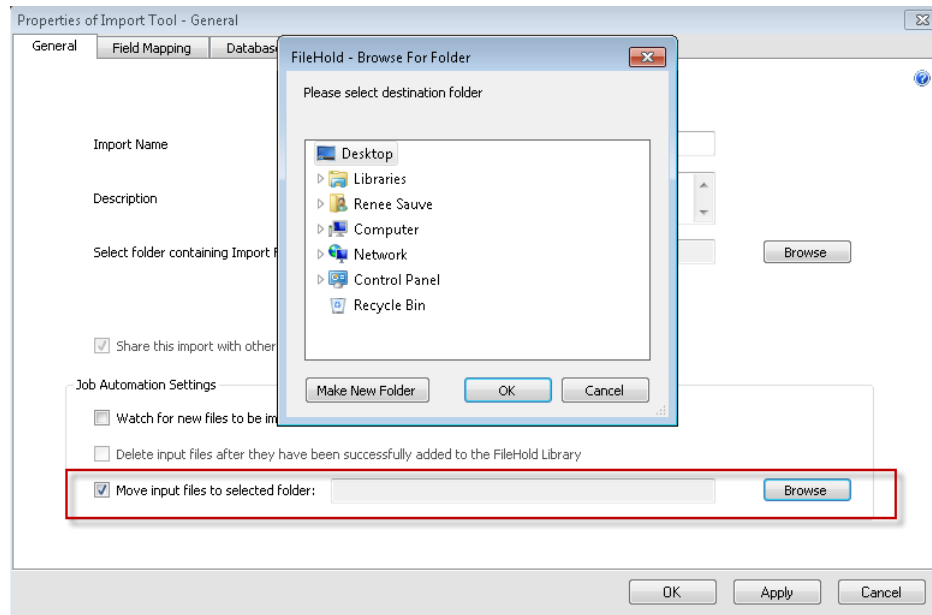
If you change this setting, it won't take effect until you log off and then log back in.

### 3.8.2. Moving Imported Files

After files have been imported into FileHold, they can be moved from the file location from which they were imported from to another location on the local computer or network. If a file with the same name exists in the destination folder, a unique number will be appended to the file name.

**NOTE:** This option cannot be used in conjunction with the **Delete input files after they have been successfully added to the FileHold Library** check box.

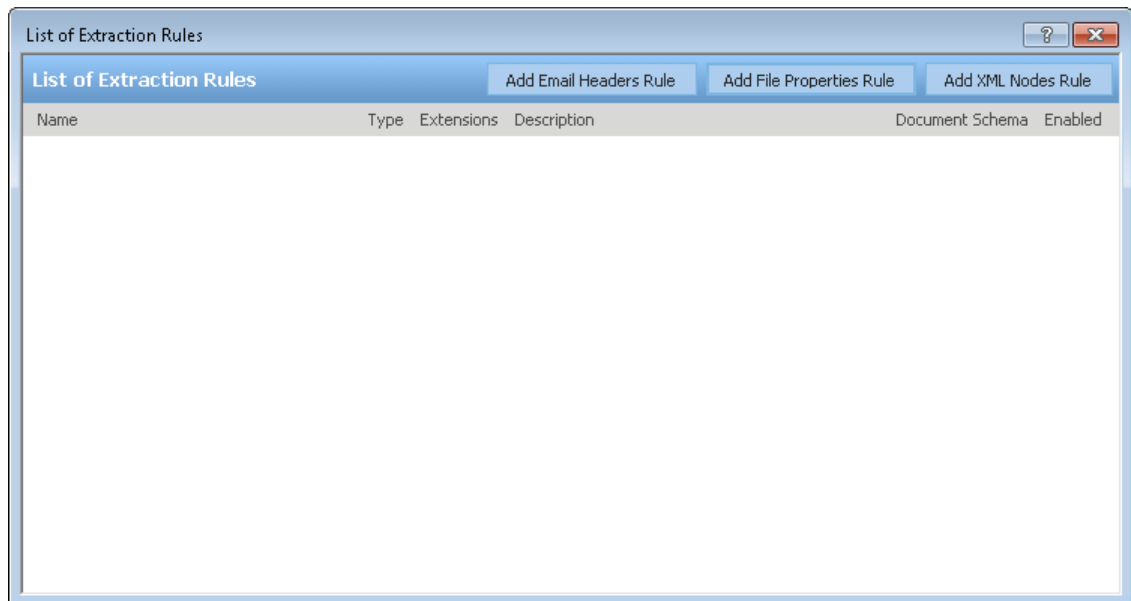
To move imported files to a location on a local computer, select the **Move input files to selected folder** check box in the **Tools > Manage Imports Tool > General** tab.



### 3.9. EXTRACTING METADATA FROM EMAIL HEADERS, FILE PROPERTIES, AND MICROSOFT WORD FORMS

A new Extraction Rules tool has been created in order to manage the extraction of metadata from Microsoft Office Outlook msg files, file properties of any file type, and Microsoft Office Word forms. Extraction rules only accessible in FDA by Library Administrators or higher permissions.

To access the extraction rules, go to **Tools > Extraction Rules**.



#### 3.9.1. Extracting Email Headers

You can automatically extract email header information (To, From, CC, Subject, and Date) into metadata fields when an extraction rule is set. Extraction rules for email will only extract

Microsoft Outlook msg files. The configuration for the extraction of Microsoft Outlook email metadata has been **removed** from the [Library Administration > General Settings](#) area to a new Extraction Rules window. The email extraction configuration settings in FileHold 09 will be automatically imported into the Email Headers Rule in FileHold 12 when you are upgraded.

You need to create an Email schema with associated metadata fields in order to map the header information. In addition to the To, From, CC, and Subject fields, you can now add a metadata field to capture the Attachments on the email as well.

Once the Email schema is created you can create the Email Headers Rule and map the schema and metadata fields.

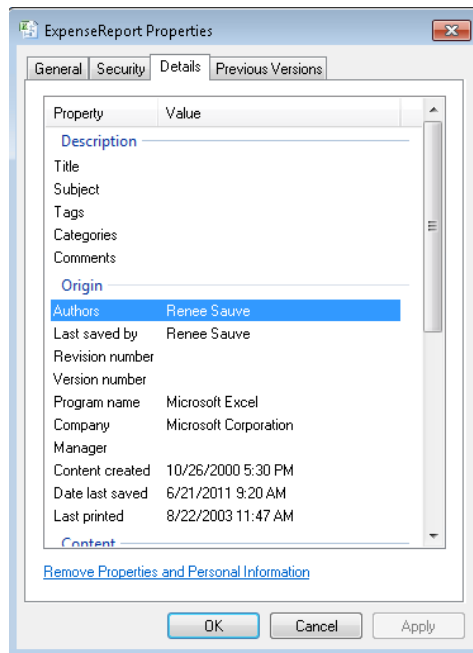
Go to [Tools > Extraction Rules > Add Email Headers Rule](#). Select the Email schema name from the Document Schema field and map the corresponding fields.

The screenshot shows the 'Email Headers Rule' configuration window. The 'Name' field is 'Email Extraction Rule', 'Extensions' is 'msg', and 'Rule is enabled' is checked. The 'Document Schema' is set to 'Email Extraction'. The mapping table is as follows:

Source Field	Destination Metadata Field
Attachments	Attachments (email)
CC	CC (email)
From	From (email)
Subject	Subject (email)
To	To (email)

### 3.9.2. Extracting File Properties

The properties of a file can be extracted into metadata fields for a schema. The file properties are taken from the Details tab of the file properties which can be viewed from Microsoft Windows Explorer. These properties may vary for each file type and in operating systems such as Windows XP or Windows 7.



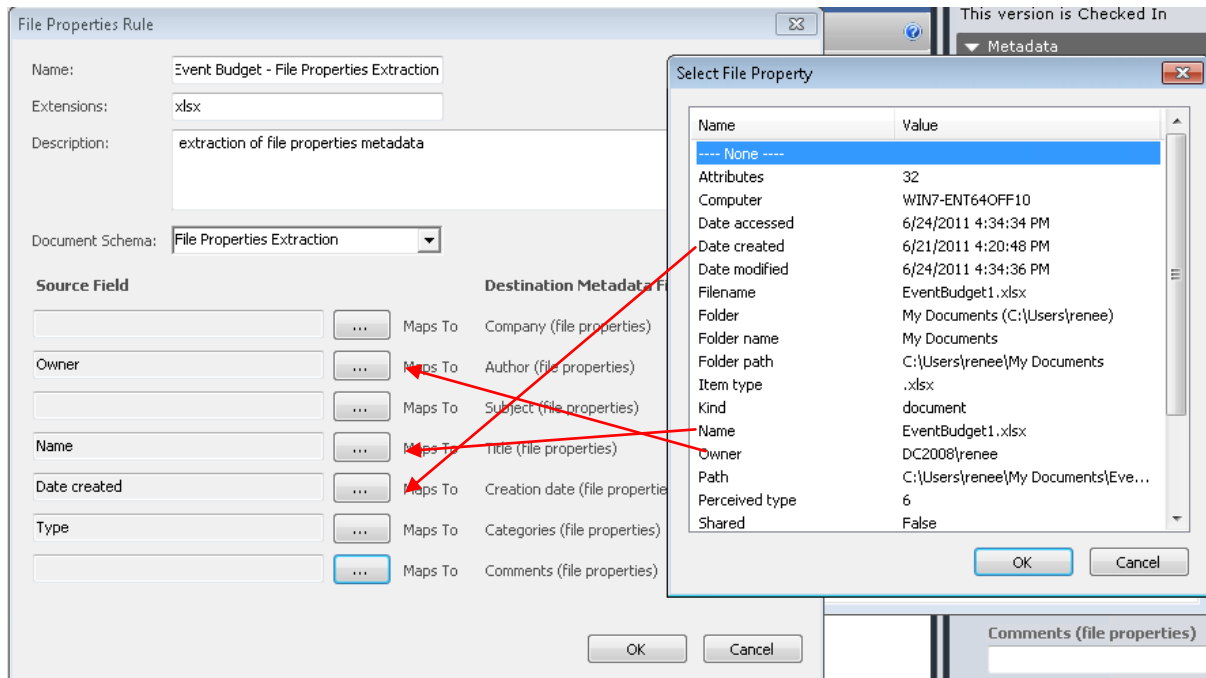
Since all file types have file properties, you can extract metadata from any type of file. When creating extraction rules for files, you can create an extraction rule for each type of file that you want to extract data from. For example, you can set a separate rule for a docx, xlsx, pdf, jpg, tiff, and so on. You can create several extraction rules per file extension; however, only one extraction rule per file extension can be enabled at a time.

To create an extraction rule, go to **Tools > Extraction Rules > Add File Properties Rule**.

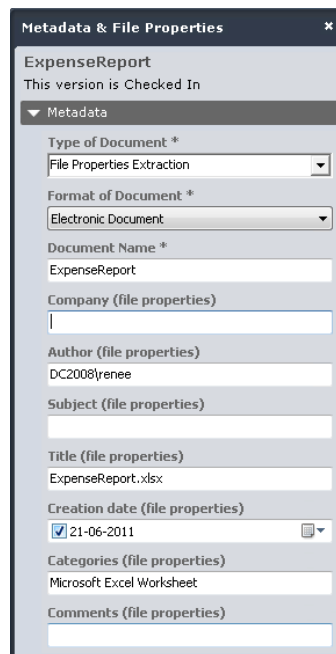
When creating a file properties rule you will need to select a document template. The document template used will determine the type of file property extraction rule created; it is dependent on the file type such as a docx, xlsx, pdf, jpg.

You will need to assign a document schema to the rule. When a document of that type is added to FileHold using that schema then the file properties will be automatically extracted.

In the example below, an extraction rule was created for a Microsoft Excel file (xlsx) file type using the File Properties Extraction schema. The file properties values were then mapped to the metadata fields.



When the xlsx file is added to FileHold, the metadata that has been mapped in the rule is automatically extracted.



**NOTE:** There is an issue when extracting file properties into metadata fields in Microsoft Office applications. Since Microsoft Office saves files as a temp file when you are working on documents within the application, any file properties related to the file name, location, or file type cannot be extracted using the FileHold toolbar. You will need to save the document, close it, and add the document from the FileHold Desktop Application (FDA) or Web Client.

### 3.9.3. Extraction of XML Content Controls from Microsoft Word Forms

In FileHold 12, you can now create a “XML Node Extraction Rule” for a Microsoft Word document (or e-Form) that has content controls. After the document has been properly configured, the values in the content controls can be extracted into the metadata fields when the e-Form is added to FileHold.

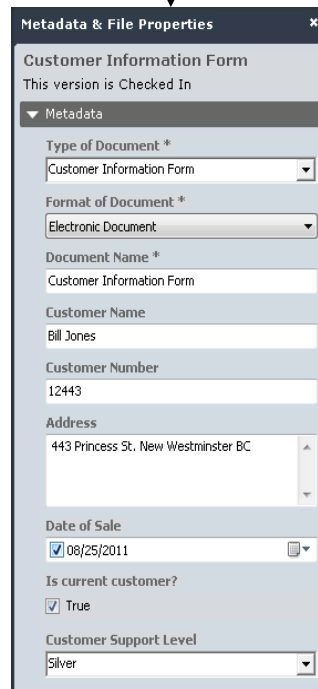
Microsoft Office Word (2010) form created with Developer Tools

#### Customer Information Form

Customer Name	Bill Jones
Customer Number	12443
Address	443 Princess St. New Westminster BC
Date of Sale	Thursday, August 25, 2011
Is current customer	<input checked="" type="checkbox"/>
Customer support level	Silver

XML Node Extraction Rule in FileHold Applied

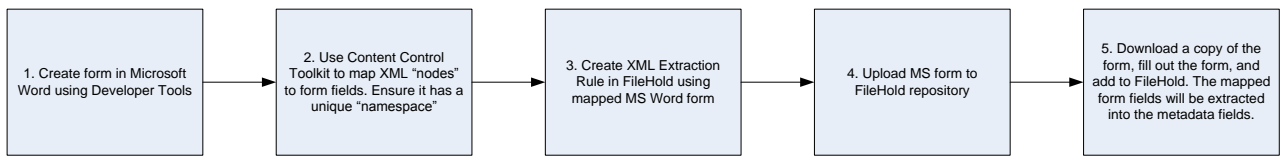
Metadata is automatically extracted from the Microsoft Office Word form when the extraction rule is applied



Using Microsoft Word 2007 or higher, you can create forms using the content controls available in Microsoft Word developer mode. FileHold will be offering form creation as a professional service for a charge when FileHold 12 is released.

Once a Word form has been created, the XML nodes mapped, and the extraction rule in FileHold added, the form can be used as a template available for download in FileHold. Users will get a copy of the form, fill out the form, save the form as a new file and add it to FileHold. When the form is added to FileHold, the mapped fields on the form will be automatically extracted to the metadata fields.

The process for extracting Microsoft Word content control values in the e-Form into the metadata fields is shown below. In the first step, the e-Form containing content controls needs to be created in Microsoft Word.



The following is a sample of a simple Microsoft Word 2010 form with text box controls, date control, check box control, and drop down menu control.

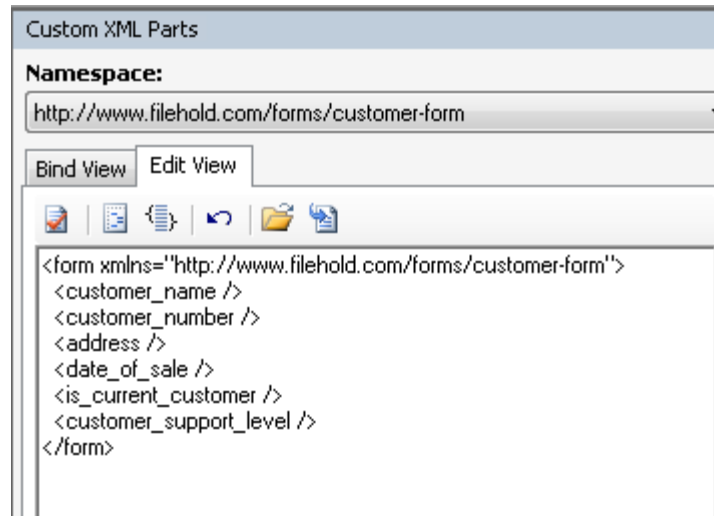
CustomerInformationForm

CustomerName	Click here to enter text.
CustomerNumber	Click here to enter text.
Address	Click here to enter text.
Date of Sale	Click here to enter a date.
Is current customer	<input type="checkbox"/>
Customer support level	Choose an item.

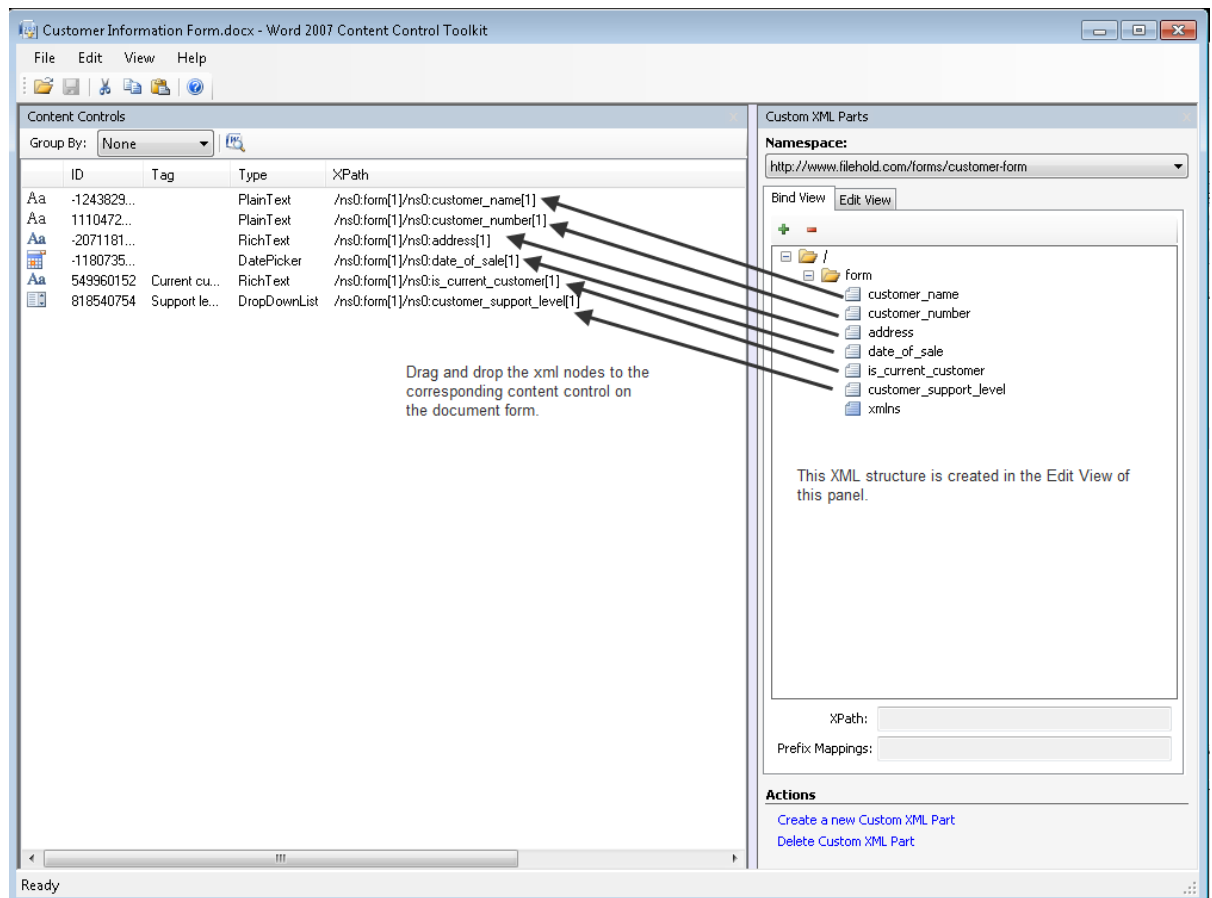
Once a form is created in Word, use the Word 2007 Content Control Toolkit to map the controls on the form to the custom XML parts. The free toolkit is made by Microsoft, is actively supported and available for download here: <http://dbe.codeplex.com/>

You will need to open the Word form in the Content Control Toolkit. In the Content Control Toolkit, you will need to bind the xml nodes to the e-Form controls. The e-Form controls are the text fields, check boxes, date pickers, drop down menus etc. that make up the Word e-Form. The xml nodes are what you define in the xml file that will be used to map to the metadata fields in the Extraction rule.

In order to bind the xml nodes to the form controls, you need to create an xml file (either directly in the Content Control Toolkit or copy and pasted from another application such as Notepad ++ ) with the xml nodes and a defined xml name space. The xml nodes define which parts of the e-Form will be extracted to the corresponding metadata field. The unique name space is required in order to create the unique extraction rule in FileHold. For example, see the image below:



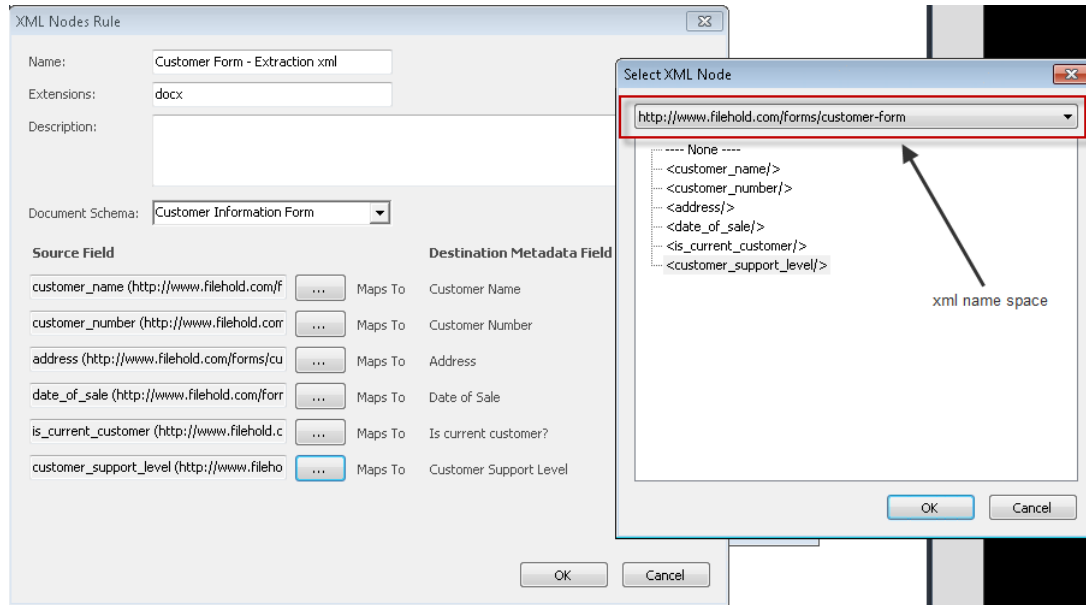
After creating the xml nodes (parts), you can drag and drop the xml nodes to the content controls to bind the content. Save the Word e-Form when finished.



Once the controls are mapped in the toolkit, a Library Administrator or higher can create the XML Nodes Extraction rule in FileHold to map the controls on the form to the metadata fields in a schema.

Go to **Tools > Extraction Rules > Add XML Nodes Rule**. Select the Word e-Form template that you have already created the mapping for.

In order to map the metadata fields to the control fields, select the name of the name space created in the xml file from the list and then map the XML nodes to the metadata fields in the schema.



The Library Administrator can then add the Microsoft Word e-Form template into a FileHold folder where users would be able to access the document. Any user with publishing rights or greater can get a copy of the form and fill out the form. They can then save the form and add it to FileHold using the schema that uses the extraction rule. The metadata will be automatically extracted from the form.

Training and Support/FileHold 12/Forms

Document Name	Type	Linked	Ver	Status	Last Modified On
Alfonso	Customer Information Form	0	1	Checked In	8/25/2011 3:30 PM
auto-initiate-test	AutoInitiateWFSchemaRenee	0	1	Checked In	8/25/2011 3:30 PM
Customer Information Form	Customer Information Form	0	1	Checked In	8/25/2011 3:30 PM
Customer Information Form	Customer Information Form	0	1	Checked In	8/29/2011 11:12 AM
dev test form	Inventories	0	1	Checked In	8/25/2011 3:30 PM
File properties extraction test	File Properties Extraction	0	1	Checked In	8/25/2011 3:30 PM
fileprops	File Properties Extraction	0	1	Checked In	8/25/2011 3:30 PM
healthcheckerreportjun28	AutoInitiateWFSchemaRenee	0	1	Checked In	8/25/2011 3:30 PM
Joey'sBurnaby	Customer Information Form	0	1	Checked In	8/25/2011 3:30 PM
Larry'sLizards	Customer Information Form	0	1	Checked In	8/25/2011 3:30 PM
Michal_Form	Customer Information Form	0	1	Checked In	8/25/2011 3:30 PM
Michal_Form_4	JL Schema for Property Extraction	0	1	Checked In	8/25/2011 3:30 PM
Michal_Form_5	JL Schema for Property Extraction	0	1	Checked In	8/25/2011 3:30 PM
TomNewton	Customer Information Form	0	1	Checked In	8/25/2011 3:30 PM

**Customer Information Form**  
This version is Checked In

**Metadata**

Type of Document \*  
Customer Information Form

Format of Document \*  
Electronic Document

Document Name \*  
Customer Information Form

Customer Name  
Bill Jones

Customer Number  
12443

Address  
443 Princess St. New Westminster BC

Date of Sale  
 08/25/2011

Is current customer?  
 True

Customer Support Level  
Silver

### 3.10. NEW REPORTS

The new reports include:

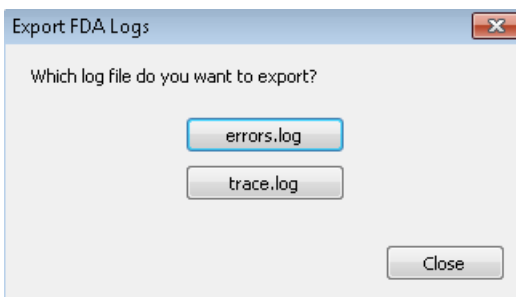
- [Trace Log](#)
- [Error Log](#)
- [System Audit Log](#)
- [Library Audit Log](#)
- [Full Text Search Report](#)
- [Insufficient Concurrent Access Licenses \(CALs\) Report](#)

#### 3.10.1. Trace and Error Logs

There are two logs that can be exported from the FileHold Desktop Application. If a user is experiencing problems with the document management application, they can now export the error log and trace log easily without having to go through folder structure on their computer.

The Trace.log is a list of any .NET framework errors. The Error.log is a list of FDA errors. These files can be sent to FileHold support in the event of a problem.

In FDA, go to **Tools > Export Logs**. Select either the **errors.log** or the **trace.log** options and save the file to your local computer. Click **Close** when complete.



#### 3.10.2. System Audit Log

In the System Administration area go to **Logs and Reports > Audit Log**. You can filter the logs by user name and from and to dates.

The System Audit Log logs the following information:

- Adding local and domain users
- Deleting local users
- Adding and deleting FileHold groups
- Enabling and disabling licenses
- Resetting passwords
- Adding and removing users to and from FileHold groups

User Name	Description	Action Date
sysadm	Modified domain user: Renee Sauve (added to group System Administrators)	6/14/2011 11:18:40 AM
sysadm	Added domain user: Renee Sauve	6/14/2011 11:18:10 AM
jacek	Enabled domain user: Beng Penamante	5/30/2011 1:10:23 PM
jacek	Disabled domain user: Beng Penamante	5/30/2011 1:10:17 PM
sysadm	Modified domain user: Jacek Lipowski (added to group System Administrators)	5/28/2011 11:01:27 AM
sysadm	Modified domain user: QA 20 (added to group Read Only)	5/28/2011 10:57:06 AM
sysadm	Modified domain user: QA 1 (added to group Read Only)	5/28/2011 10:57:06 AM
sysadm	Modified domain user: QA 21 (added to group Publishers)	5/28/2011 10:57:06 AM

### 3.10.3. Library Audit Log

In the Library Administration area, go to [Library Utilities > Audit Log](#). You can filter the logs by user name and from and to dates. Only entries related to where the Library Administrator is an owner will be displayed in the log.

The Library Audit Log logs the following information:

- Deleting document versions (soft delete, hard delete, and restoring a document from the soft delete phase)
- Deleting library objects such as cabinets, drawers, folder groups and folders
- Deleting schemas
- Deleting metadata fields and removing metadata fields from schemas
- Adding, removing, and modifying cabinet and folder memberships
- Changing the owner of a cabinet, folder, or document version

User Name	Description	Action Date
System Process	Permanently deleted: System Architecture 9.0	6/6/2011 12:00:09 AM
System Process	Permanently deleted: FH WebServices Architecture	6/6/2011 12:00:09 AM
System Process	Permanently deleted: Records Management Analysis	6/6/2011 12:00:09 AM
System Process	Permanently deleted: Source Control Organization Document	6/6/2011 12:00:09 AM
System Process	Permanently deleted: Roles and Permissions Design Document	6/6/2011 12:00:09 AM
System Process	Permanently deleted: FileHold team project internal tools	6/6/2011 12:00:09 AM
sysadm sysadm	Deleted document: Source Control Organization Document	5/29/2011 10:59:38 AM
sysadm sysadm	Deleted document: Records Management Analysis	5/29/2011 10:59:38 AM
sysadm sysadm	Deleted document: FH WebServices Architecture	5/29/2011 10:59:38 AM
sysadm sysadm	Deleted document: System Architecture 9.0	5/29/2011 10:59:38 AM
sysadm sysadm	Deleted document: Roles and Permissions Design Document	5/29/2011 10:59:38 AM
sysadm sysadm	Deleted document: FileHold team project internal tools	5/29/2011 10:59:37 AM

### 3.10.4. Full Text Search Report

You can run a report from the Search Engine Status page that contains:

- All dtSearch settings
- All information from the status and error pages
- Number of documents in the Library
- Version of the dtSearch dll file

To access the report go to **Library Administration > Search Engine > Status**.

The report can be opened or saved as an html file after clicking **Save Search Status**. An example report is below.

**FileHold FullTextSearch Status**

Machine name: qp-moss2007  
 Current user name: Ramse  
 Current user domain: FileHold  
 OS version: Microsoft Windows NT 5.2.3790 Service Pack 2

- Menu**  
[FTS Status](#)  
[DtSearch dll file](#)  
[FTS settings](#)  
[Library statistics](#)  
[Error list](#)

**Detailed status**

**FTS Status**

Update date: 6/29/2011 7:34:16 PM GMT  
 Task queue length: 0  
 Fts last update: Succeeded  
 Fts scheduled: No  
 Fts status: Idle  
 Word count: 132914  
 Doc count: 674  
 Index size: 31168720  
 Obsolete count: 9  
 Percent full: 0  
 Fragmentation: 55  
 Created date: 5/28/2011 5:30:40 PM GMT  
 Compressed date: Never  
 Flags: 805306368  
 Structure version: 701  
[Go back](#)

**DtSearch dll file**

DtSearch dll path: C:\WINDOWS\system32\dtsearch.dll  
 File exists: True  
 Version: 7.65.7907.1  
[Go back](#)

**FTS settings**

Stop Searching After: 10000  
 Number of Files To Return: 5000  
 Search timeout: 60  
 Search Result Metadata Weighting: 3  
 Hyphen Searching: HyphenAsSpace  
 Flags: False  
 Phonetic Search: False  
 Stemmed Search: False  
 Synonym Searching: False  
 Related Words: False  
 Fuzzy Search Setting: 0  
 Error Email Addressees: All  
[Go back](#)

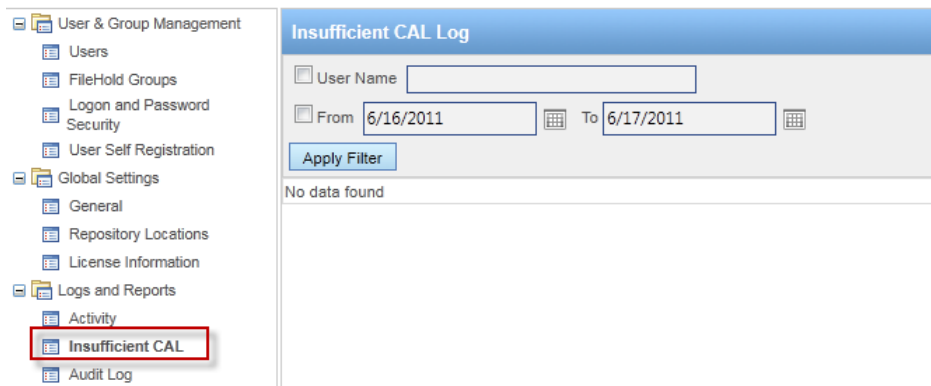
**Library statistics**

Cabinets count: 2  
 Drives count: 2  
 Folder groups count: 0  
 Folders count: 3  
 Files count: 7

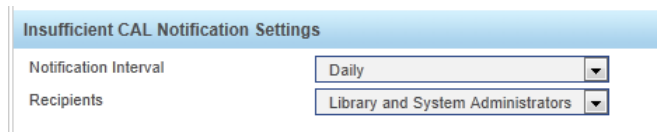
### 3.10.5. Insufficient User Licenses (CALs)

To determine if there are enough concurrent user licenses for FileHold, you can run the Insufficient CAL (Concurrent Access Licenses) Log to view which users were not able to log into the system due to there not being enough concurrent licenses. In the log, you can search by user name and dates.

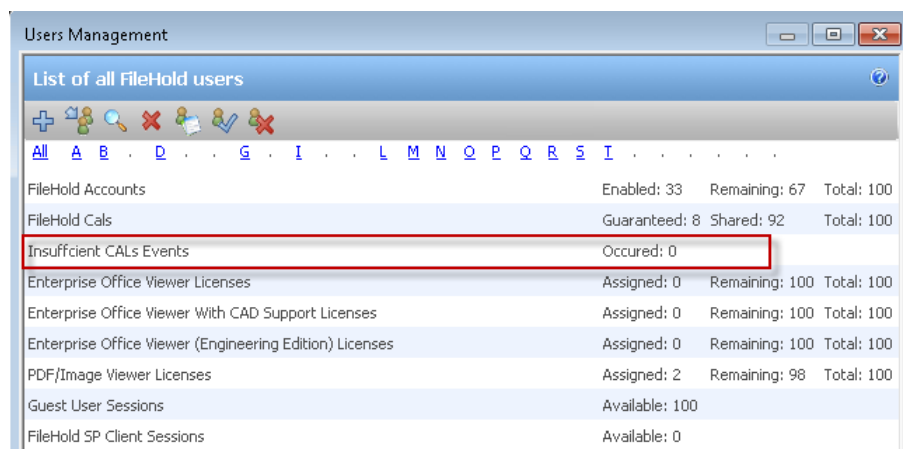
To access the Insufficient CAL Log, go to **System Administrator > Logs and Reports > Insufficient CAL**.



An email notification can be sent to System Administrators and/or Library Administrators when there are insufficient concurrent access licenses. The frequency of the emails can be sent daily or weekly. To set the notification, go to **System Administration > Global Settings > General > Insufficient CAL Notification Settings**. In the **Notification Interval** field, select **Daily** or **Weekly**. In the **Recipients** field, select None, System Administrators Only, or Library and System Administrators.



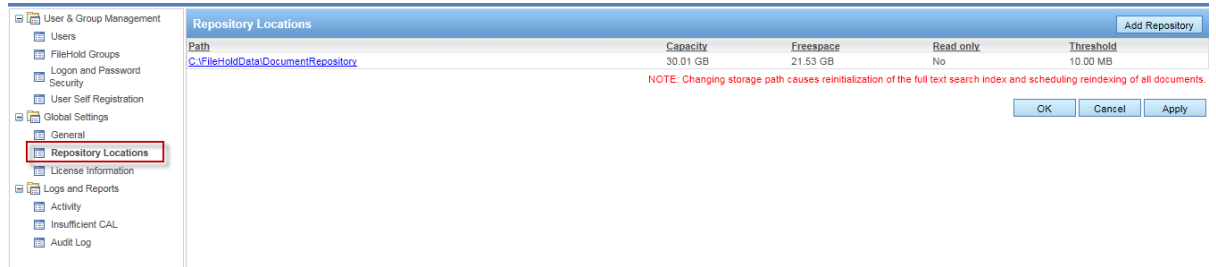
The number of insufficient CAL events for the last 24 hours is also shown in the license information area in the Users page of FDA and Web Client.



### 3.11. MULTIPLE DOCUMENT REPOSITORIES

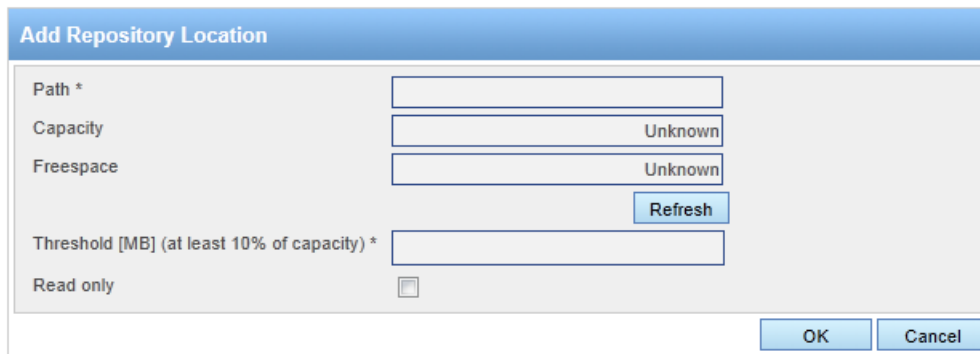
In versions prior to FileHold 12, only one document repository was able to be used. Storing the repository in a single location limited the repository size to a single disk drive which is about 2 TB. The storage location was set in the [System Administration area > Global Settings > General Settings](#) page.

In FileHold 12, the document repository can be split into multiple physical locations to improve scalability. The storage locations are now set in the [System Administration area > Global Settings > Repository Location](#). This feature is controlled by a licensing option. If this optional feature has not been purchased, the [Add Repository](#) button will be disabled.



To add a repository, click [Add Repository](#).

Field	Description
Path	The path of the physical location.
Capacity	The total size of the disk in TB, GB, or MB. This will be automatically calculated by the system.
Free Space	The amount of free space on the disk in TB, GB, or MB. This will be automatically calculated by the system.
Threshold	The amount of reserved free space on the disk. The default value is 15% of the total disk capacity. You cannot set this limit to less than 10% of the remaining free space on the disk.
Read Only	When selected, documents cannot be added to this physical location. When clear, documents can be added to this physical location.  You cannot mark all locations as read only. There must be at least one disk that is writable for the addition of files into the system.



**Add Repository Location**

Path \*

Capacity

Freespace

Threshold [MB] (at least 10% of capacity) \*

Read only

In the Repository Locations main page, you need to finalize the addition of the repository location by clicking **OK** or **Apply**. If necessary, the Full Text Search index is re-initialized after applying any changes such as a change in repository path.



**Repository Locations**

Path	Capacity	Freespace	Read only	Threshold
<a href="#">C:\FileHoldData\DocumentRepository</a>	30.01 GB	21.26 GB	No	10.00 MB

**NOTE:** Changing storage path causes reinitialization of the full text search index and scheduling reindexing of all documents.

Once a path has been added, new files will be added to the location immediately. Repositories containing files cannot be deleted.

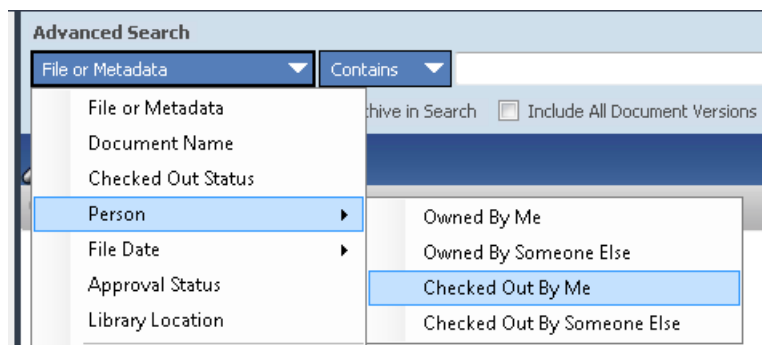
In order to balance the load of adding/downloading files between multiple locations and ensure that files are distributed in a sensible way between locations with different level of free space, a semi-random algorithm will be used to select the location for a new file. Repositories that have been marked as read only will not have files added to them; files can only be downloaded.

When all locations reach the threshold, it is not possible to add any files to the system and all uploads fail with an error message. The System Administrator should immediately add a new location to the system or to provide more free space on one of the disks.

### 3.12. ADVANCED SEARCH – NEW SEARCH VALUES

Additional search criteria have been added to the Advanced Search feature.

- Under the Person search criterion, “Checked Out By Me” or “Checked Out By Someone Else” has been added.



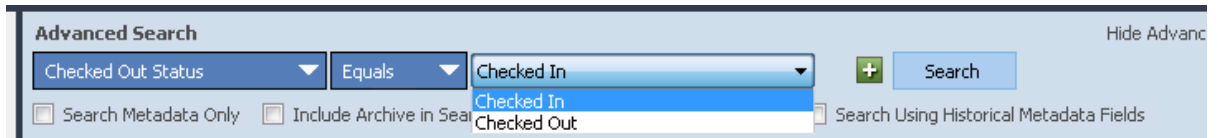
**Advanced Search**

File or Metadata

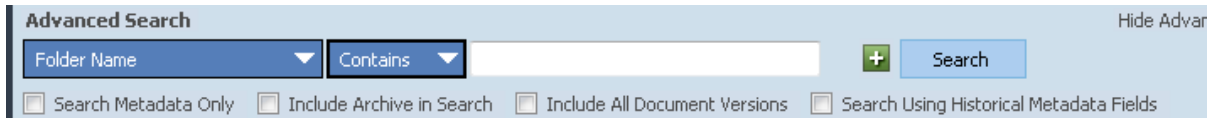
File or Metadata  Archive in Search  Include All Document Versions

- File or Metadata
- Document Name
- Checked Out Status
- Person 
  - Owned By Me
  - Owned By Someone Else
  - Checked Out By Me
  - Checked Out By Someone Else
- File Date
- Approval Status
- Library Location

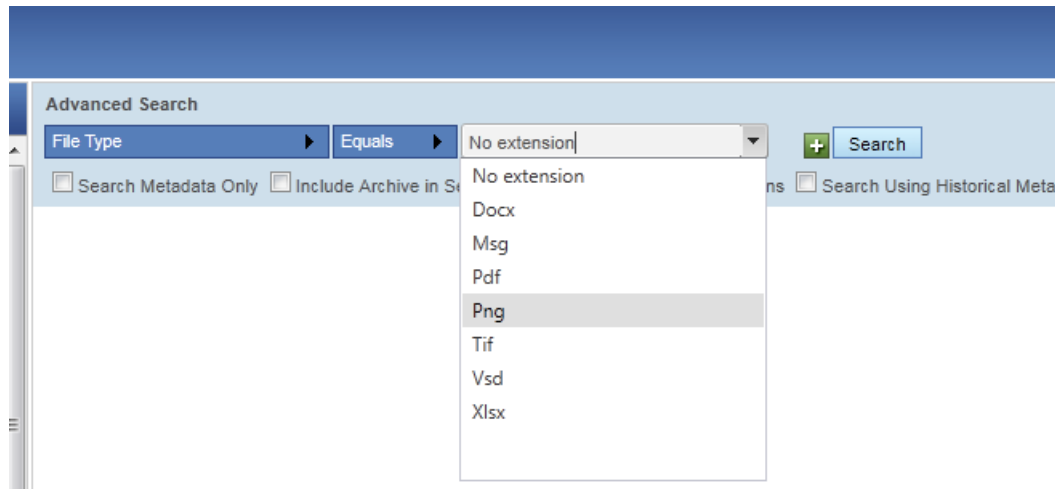
- There is a new Checked Out Status criterion which allows you to set the status to equal Checked In or Checked Out.



- In the Folder Name criterion, you can now search using part of a folder name when the “Contains” operator is selected. Note that no wildcards or dtSearch keywords can be used for this option.



- The File Type Extension list is now dynamically updated and sorted alphabetically. A new file extension entry is dynamically added to the initial standard list upon adding a document with a new file extension for the first time. The list is not updated in FDA until the user logs in and out.
- Multiple file extensions can be used when the qualifier is set to “In the list”. Insert a comma between the file extensions.



### 3.13. WORKFLOW IMPROVEMENTS

Several enhancements have been made to the workflow functionality.

#### 3.13.1. Status Reports

The Library Administrator Workflow Status report can now be accessed from FDA by going to [Administration > Workflows > Status Report](#). In the Web Client, it can still be accessed from [Library Admin > Workflow > Status Report](#).

In the Library Administrator Workflow Status Report, you can search by additional workflow statuses. The workflow search status can equal:

- In progress

- Completed
- Cancelled
- Approved
- Not approved
- Pending approval

Get a Copy | Cancel Workflow | Clear Completed | Clear Cancelled | Override Task/Activity | Delegate Task

Reviews & Approvals Status Report ?

Workflow Status Equals In Progress

Completed Between

Date Started

Due Date

Document Name Contains

Workflow Name Contains

Initiator is Beng Penamante

Apply Filter

5/17/2011

5/17/2011

In Progress

Completed

Cancelled

Approved

Not Approved

Pending Approval

Once the report has been run, the results can be [printed or exported to CSV or HTML format](#).


### 3.13.2. Greater Number of Activities and Users for Tasks

The number of workflow activities has been increased from 10 to 20 activities. The number of participants in an activity has been increased from 10 to 50 users participating in the activity.

### 3.13.3. Automatically Initiating a Workflow

Workflows for a specific document schema and workflow template can be automatically initiated using a server plug-in that is enabled with your license. This is an optional feature that will need to be purchased separately.

In order to see if your license has been enabled with the workflow plug-in, go to [System Administration > Global Settings > License Information](#). The [Allow Server Plug-ins](#) field should be enabled.

System information 	
Is system activated	True
System Version	FileHold 10.0.0
Build	FileHold12_20110523.1
Hardware key	215196522491901240479725
<b>Information about the license</b>	
Registered to	LGBS
Concurrent sessions	100
Registered users	100
Guest user sessions	100
FileHold SP Client sessions	100
Workflow module	enabled
Active Directory module	enabled
Redaction module	enabled
FastFind module	enabled
Print-to-FileHold	enabled
Multi Document Repository	enabled
Allow server plug-ins	enabled
Allow FDA plug-ins	enabled

Once the plug-in is enabled, you will need to add the plug-in to the server and modify the web configuration file with the document schema name and workflow template name. Once configured on the server side, the workflow will be automatically initiated when a new document is added to the document management system using the configured schema name. The workflow uses the default values from the workflow template when it is automatically initiated.

**NOTE:** The workflow will not be automatically re-initiated if a new version of the document is checked in or if the metadata has been edited. The workflow will need to be initiated manually.

#### 3.13.4. Editing Metadata During a Workflow

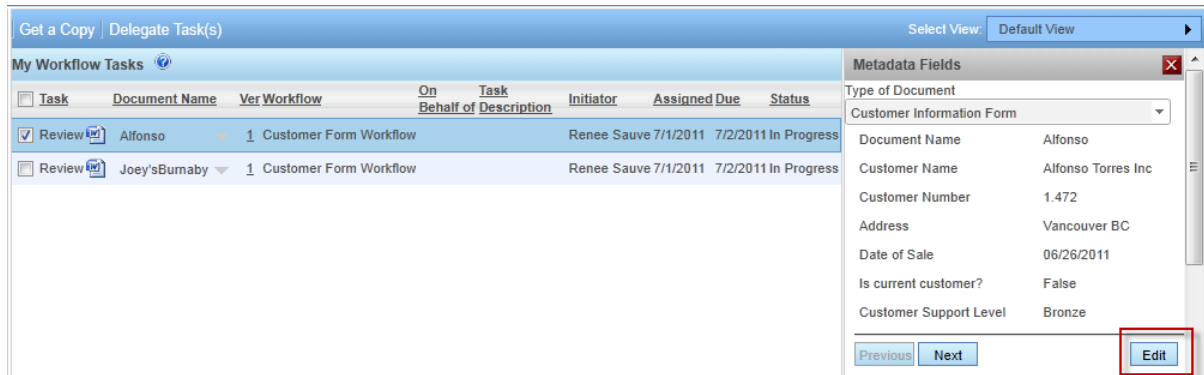
Metadata can now be edited for a document that under a workflow process. In order to use this feature, it needs to be enabled.

Go to **System Admin > Global Settings > General > Permission Settings** area and select the **Enable editing document metadata when workflow** is active check box.

Permission Settings	
<input checked="" type="checkbox"/>	Enable converting between electronic documents and records
<input checked="" type="checkbox"/>	Enable converting offline documents to electronic documents
<input checked="" type="checkbox"/>	Enable converting electronic documents to offline documents
<input checked="" type="checkbox"/>	Enable manually archiving documents
<input checked="" type="checkbox"/>	Enable manually unarchiving documents
<input checked="" type="checkbox"/>	Allow non document version owners to initialize workflows
<input checked="" type="checkbox"/>	Enable editing document metadata when workflow is active

Any user that has access to the document undergoing a workflow can edit the metadata. If you do not want users outside of the workflow editing metadata on the document, select the **Hide all versions of the document** check box in the workflow template until the document has been approved in the workflow process.

To edit the metadata of a document undergoing a workflow, select **Metadata & File Properties** and click **Edit**. Make and save the changes.

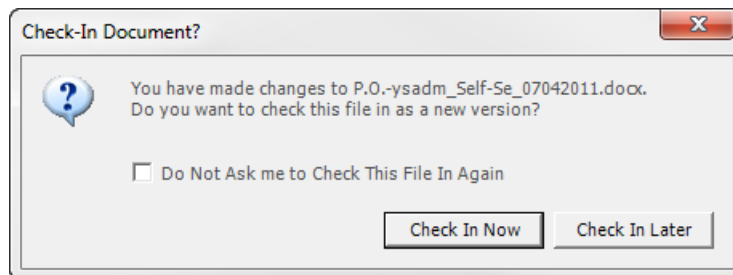


### 3.14. SMART MESSAGES

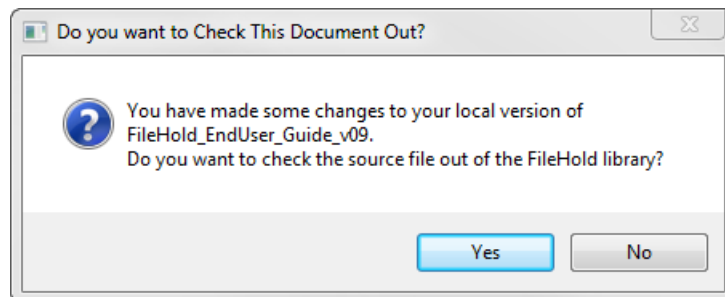
Smart messages are the messages that appear when checking in and out a document using Microsoft Office applications.

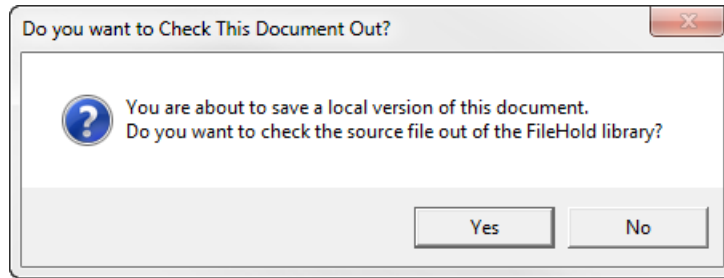
The following are smart messages:

- When saving and closing a document without checking in a checked out document:

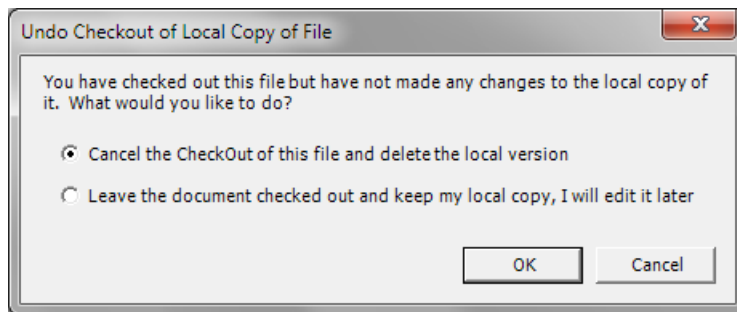


- When getting a local copy of a document, making edits, and saving without checking out the document:

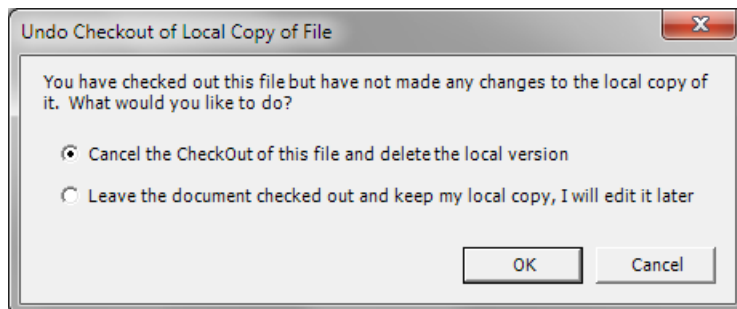




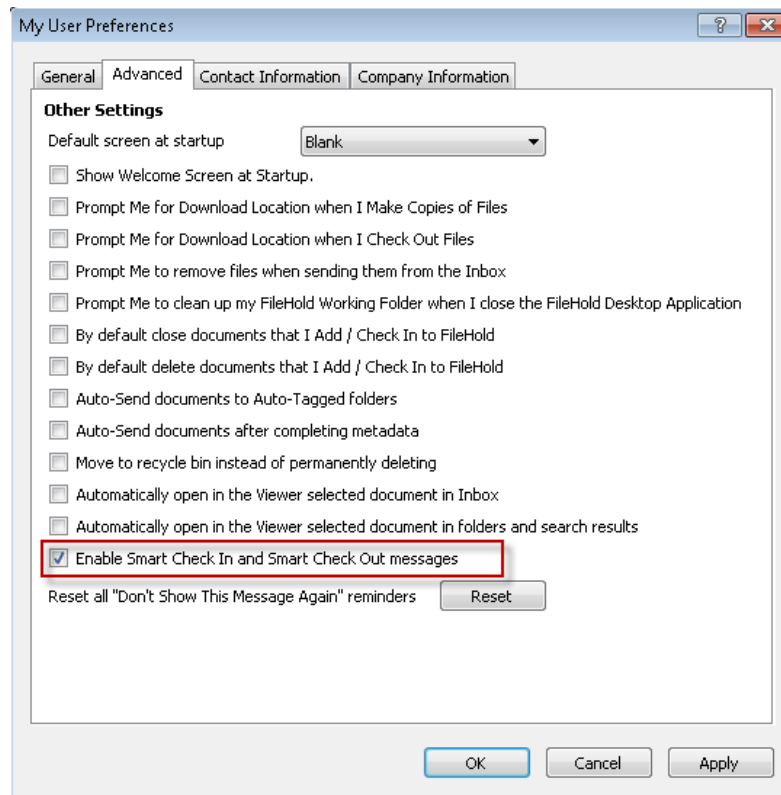
- When checking out and opening a document and close the document after making no changes.



- When opening and checking out a document (CTRL+double-click), and closing the document without making any changes.



You can disable the check in and out messages by going to [Preferences & Settings > User Preferences](#) in FDA. This setting is enabled by default.

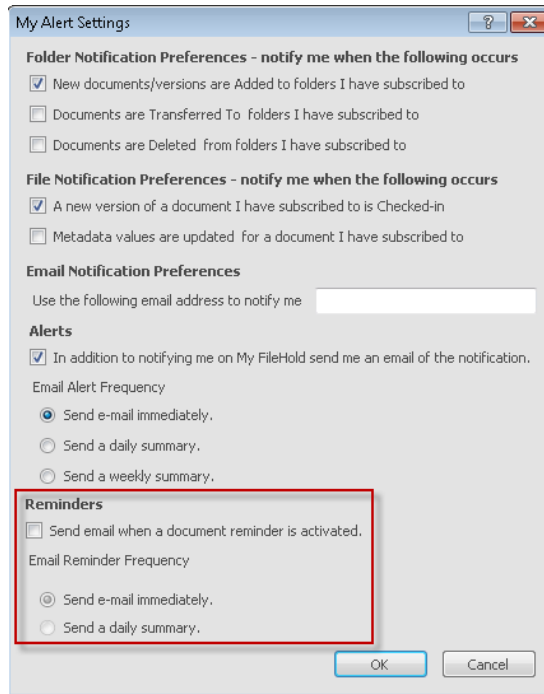


### 3.15. EMAIL NOTIFICATIONS FOR REMINDERS

You can now receive emails for when a Reminder is set on a document.

Go to **Preferences & Settings > Alert Preferences** in FDA or **My FileHold > My Alert Preferences** in the Web Client.

When sending the email for a document reminder is activated, you can set the email frequency to send immediately or send a daily summary.

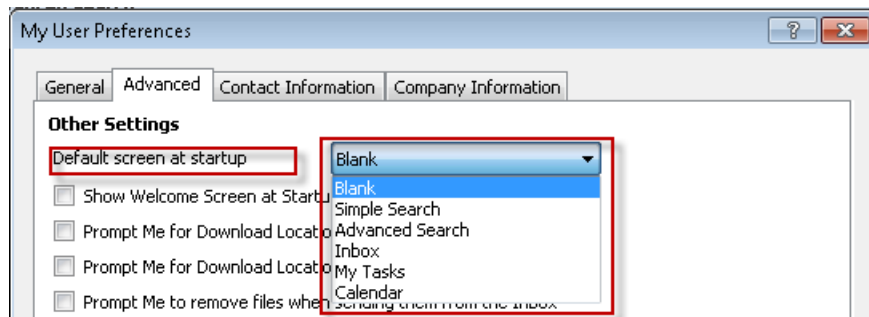


### 3.16. DEFAULT SCREEN AT START-UP

You can set the screen you want to see upon start-up when logging in to FDA.

Go to **File > Preferences & Settings > User Preferences > Advanced** tab. Select the default screen at start-up:

- Blank
- Simple Search
- Advanced Search
- Inbox
- My Tasks
- [Calendar](#)



### 3.17. CUSTOM NAMING FIELDS IN A SCHEMA

To custom name files in a schema, you no longer have to have the metadata field a required field in the schema in order to appear in the custom name “Profile Field” list. All metadata fields for that schema will appear in the list whether they are required values or not.

Constant	Profile Field	Field Mask
_	None Selected	
_	None Selected	
_	Document Version	
_	Owner	
_	FileHold ID	
_	Created On	
_	Last Modified Date	
_	Size	
_	Filename	
_	Custom Text String	
_	Submission Date	
_	Notes	
_	None Selected	
_	None Selected	

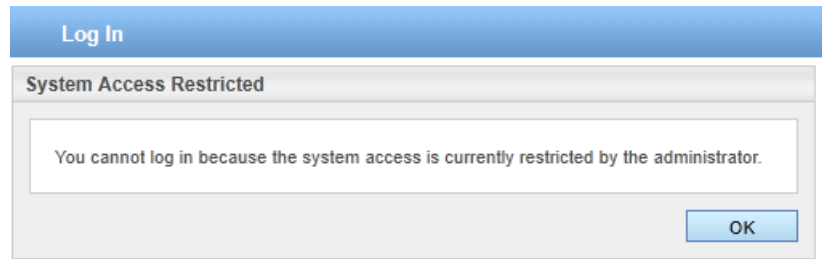
### 3.18. RESTRICTING ACCESS TO THE DOCUMENT MANAGEMENT SYSTEM FROM USERS

You can restrict access to the document management system at any time. This allows only Administrators to access to FileHold during an upgrade or when making major changes to the system. When access is restricted, users will not be able to log in. Access can be restricted to:

- All Users – All users have access to the system. Both Library Administrators and System Administrators can set this option.
- Library and System Administrators – Only Library and System Administrators have access to the system. Both Library Administrators and System Administrators can set this option.
- System Administrators – Only System Administrators have access to the system. Only System Administrators can set this option.

To restrict access to the system, go to [Library Admin > Library Settings > General > Restricted Access](#) area.

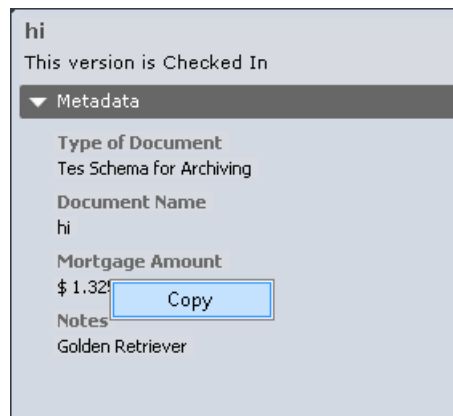
If access has been restricted and a user attempts to log in they will receive a warning message “You cannot log in because the system access is currently restricted by the administrator.”



### 3.19. COPYING METADATA

You can copy metadata values that are in their non-editable form in FDA.

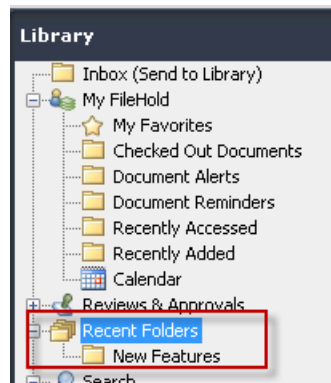
Right-click on a metadata value in the Metadata pane and click **Copy**.



### 3.20. RECENTLY USED FOLDERS

A list of the last 10 used folders is displayed in the tree in FDA, the Select Destination windows, and FileHold Office Client window. The Recent Folders list will not be shown in the Web Client.

This is useful for viewing and keeping track of what areas of the document management system you are using and quick access to the documents in those folders.




### 3.21. FILTERING SCHEMAS AND METADATA FIELDS

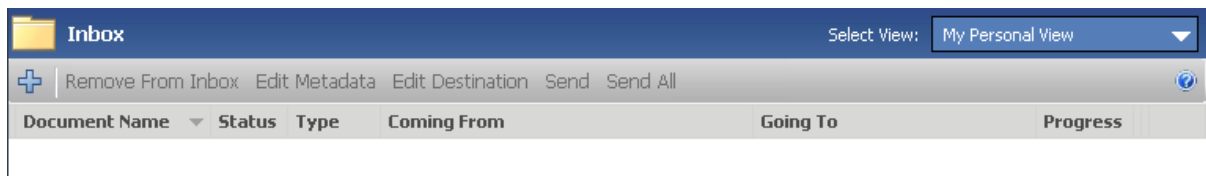
The list of schemas and metadata fields can be filtered by the first letter of the schema or metadata name. This is in both FDA and Web Client.

Click on a linked letter to display the list of schemas or metadata fields that start with that letter.



### 3.22. SORTING THE INBOX COLUMN HEADERS

The Inbox can be sorted by document name, type, coming from, or going to by clicking on the column header name. The columns can be sorted in ascending or descending order by clicking on the arrow button .



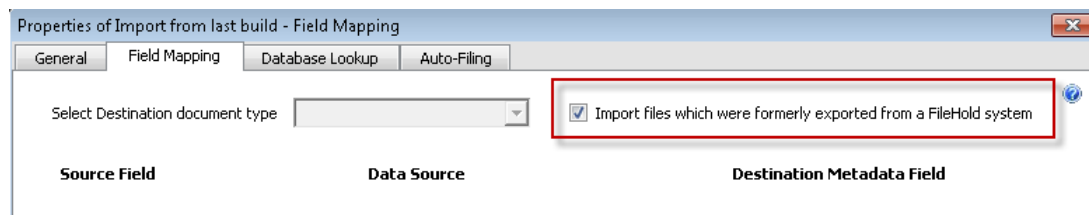
### 3.23. LOCALIZATION OF FILEHOLD

A new wizard has been created to translate resource files and create language pack installers for easy localization of different FileHold versions. See <http://www.filehold.com/help/customization/localization> for details.

### 3.24. FILEHOLD COMPATIBLE IMPORTS – MANAGE IMPORTS TOOL

The FileHold Instrumentation Tools allow exporting documents from the whole library or a selected container together with metadata in XML format compatible with the Manage Imports. Usually documents exported this way have different schemas, so their metadata cannot be directly mapped from the XML file. In FileHold 12, both the library location and the document schema name are added to the XML file for each document. These imports can be done directly in FDA using the Manage Imports tool. Exports can also be done using the [Export](#) function in FDA in FileHold 12.

A checkbox labeled 'Import files which were formerly exported from a FileHold system' is added to the Import Tools form. When selected, the rest of the Field Mapping tab is disabled. During the import, the document schema is automatically selected for each document based on the XML file and all metadata fields and is automatically mapped based on their name. As long as all schemas and metadata fields are created or imported before importing documents, this allows importing documents with original schemas and metadata values.



When the checkbox 'Import files which were formerly exported from a FileHold system' is selected for the document import, it is not possible to select a fixed destination or an auto-filing script. Instead the destination location will be determined for each document based on the library path field in the XML file. The auto-filing mechanism is not used and all cabinets, drawers and folders must exist in the library before importing the documents.

It is possible to enable the 'auto-send' feature for document imports using the FHIT compatible format. In that case all documents are uploaded directly to the library without using the Inbox. Alternatively it is possible to import documents to the Inbox in order to review the metadata.

Note that some information about the documents, for example the owner, creation date and history, will not be preserved during the export and import process. Only the actual files, their metadata and location will be preserved.

### 3.25. CHANGING OWNERS AND CHECKING IN FOR USERS

Displaying the various statuses listed below in the Find People search results allows you to change the document, folder, and cabinet owner or check in for a user that may have been deleted, disabled, or whose permissions have been changed (invalid) in the system.

**TIP:** To display a list of all users in the system in the search results, leave the First or Last Name field blank and click [Find Now](#). This will aid you in finding any deleted, disabled, or invalid users.

When searching for an owner of a cabinet or folder, the following additional statuses will be included in the search results next to the user name:

- (Deleted) — The user or group no longer exists in FileHold.
- (Disabled) — The user no longer has a FileHold license or has been disabled in Microsoft Active Directory.

- (Invalid folder or cabinet owner) —The user or group owns at least one cabinet and does not have permission to be a cabinet owner. For example:

**Change Cabinet/Folder Owner**

Find People

First or Last Name

Find Now Cancel Clear

**Result of People Search**

Name
<input type="checkbox"/> Alfonso ipad
<input type="checkbox"/> Alfonso Safari
<input type="checkbox"/> Deborah Dixon (invalid cabinet owner)
<input type="checkbox"/> invalid user (invalid folder owner)
<input type="checkbox"/> Joey Siopongco
<input type="checkbox"/> Tom Newton

Select Cancel

When searching for owners of documents or checking in for users, the following additional statuses will be included in the search results next to the user name:

- (Deleted) — The user or group no longer exists in FileHold.
- (Disabled) — The user no longer has a FileHold license or has been disabled in Microsoft Active Directory. For example:

**Check In Files for Other Users**

Find People

First or Last Name

Find Now Cancel Clear

**Result of People Search**

Name
<input type="checkbox"/> Deleted User (disabled)

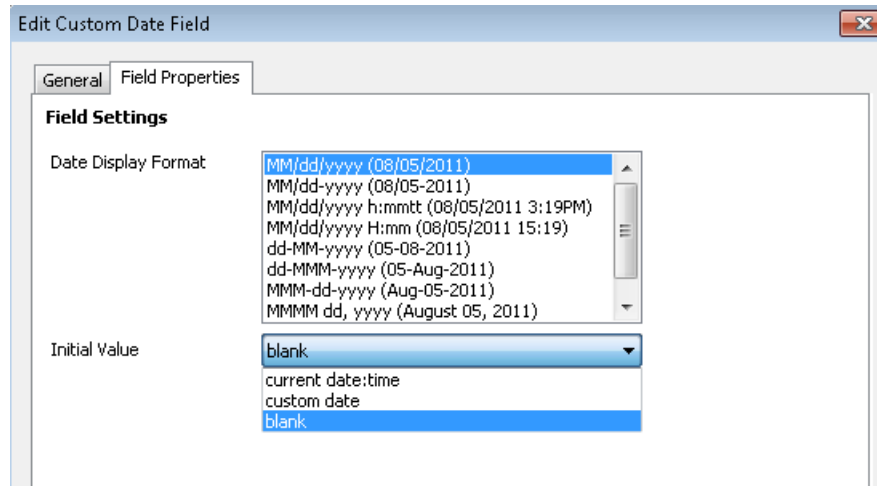
Select Cancel

### 3.26. DATE TYPE METADATA FIELDS

For Date type metadata fields, you can set the initial value to be:

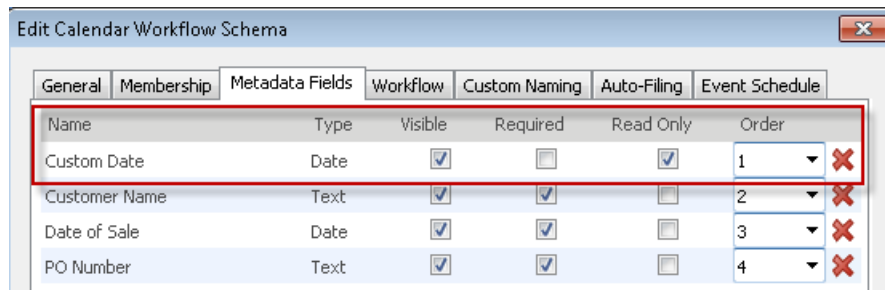
- Current date and time
- Custom date
- Blank

If a “custom date” is selected, you can select the custom date that you want set as the default date. If set to “blank” then the user will need to set a date when entering the metadata value for a document.

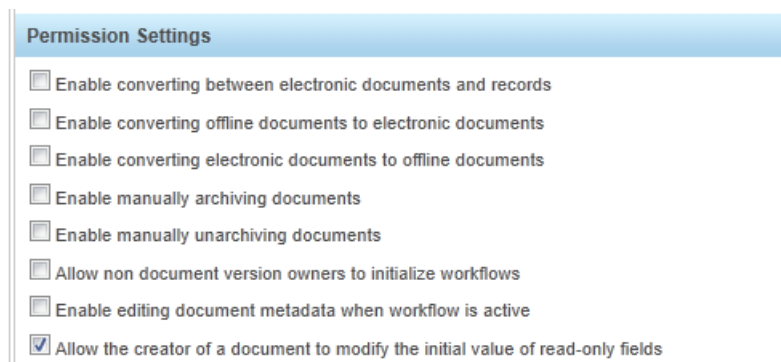


The custom date and blank date settings are useful if you are importing scanned documents into the system that require a date other than the current date and time and are set as “read-only” values. In previous versions of FileHold, if the date was set to “read-only” then only the current date and time could be used and the value was not editable.

If the date field is set to “required” in the schema, the custom date and blank date is editable by users with sufficient rights. If the date field is set to “read-only”, then the metadata field is not editable unless the permission settings to “allow the document creator to modify metadata” have been enabled in the System Administrator settings.



In System Administrator, go to **Global Settings > General > Permission Settings**. Select the **Allow the creator of a document to modify the initial value of read-only fields** check box to allow the document creator to modify the metadata after the document has been added to the Library.



### 3.27. AUTOMATIC METADATA MAPPING FOR WATCHED FOLDERS

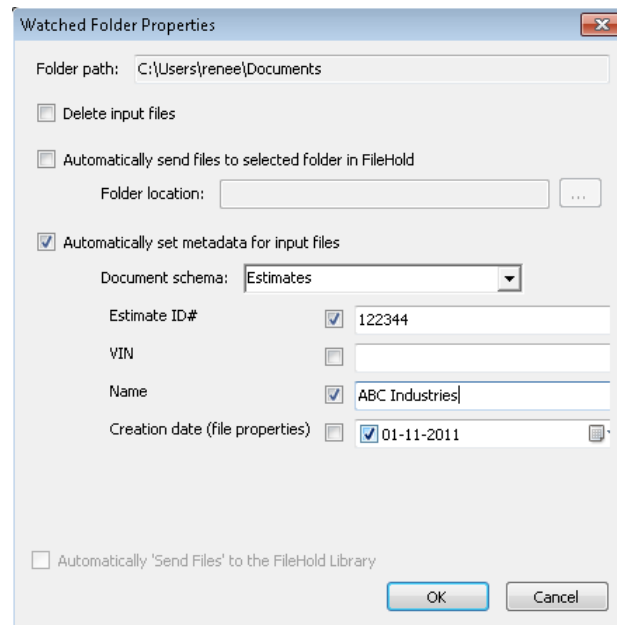
You can now assign fixed values to metadata fields in the Watched Folder properties. This is very similar to how Auto-tagging on cabinets and folders work presently.

You can determine which metadata fields will receive a fixed value for all the documents imported via Watched Folders by selecting the check box next to the metadata field name and entering a value.

If the check box is selected and the metadata field is required, a value must be entered into the field. If the check box for the metadata field is not selected, a value is not required even if the field is required. However, the “Automatically send files to the FileHold Library” cannot be enabled since the required value is missing and will need to be entered in the Inbox.

If the metadata field is set to “read-only”, then you cannot select the check box; this field will always use the default initial value set up in the schema.

In the example below, the Estimate ID# and Name metadata fields will have the same fixed value for all the documents imported via this Watched folder.



### 3.28. DISABLING DOCUMENT SHORTCUTS

Shortcuts to documents can be created but can slow down the Search performance in FileHold. When you have several million documents with several shortcuts, it impacts the performance of the system.

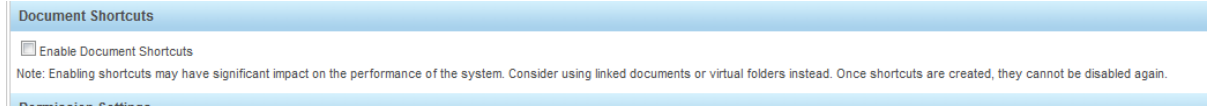
The option of creating document shortcuts can be disabled in order to improve Search performance. Shortcuts will be automatically disabled in FileHold 12 for all new installations (but can be enabled if necessary). If you have existing shortcuts from previous versions of FileHold, this will still be active and enabled when you upgrade.

There are several workarounds for shortcuts such as:

- Virtual folders
- Document tray
- My Favorites

- Linked documents
- Saved searches

You can enable document shortcuts in [System Administration > General > Document Shortcuts](#) area.



### 3.29. VERSION 0 SWITCH FOR OFFLINE DOCUMENTS

When documents of any document type (electronic document, electronic record, or offline document) are added to the Library, the first initial version is set to version 1.

For documents that are Offline Document types, you can set the initial version to be 0 instead of 1. In order to set the initial version to 0, you need to set the value to 0 in the Library Manager > web configuration file on the server.

This could be useful for organizations which use the process of Document ID/Number Reservation. Adding an Offline Document with version 0 would create a placeholder for the future electronic document version (yet to be created); however, the document ID will be issued by the system and can be used as a reference when creating the electronic version. For example, the document ID could be stated on the title page of the Microsoft Word document. By checking out the offline document and then checking back in with “Convert to Electronic Document” option enabled, the first version (version 1) of the document will be added to FileHold repository using the same document ID (initially created for the off-line document stub).

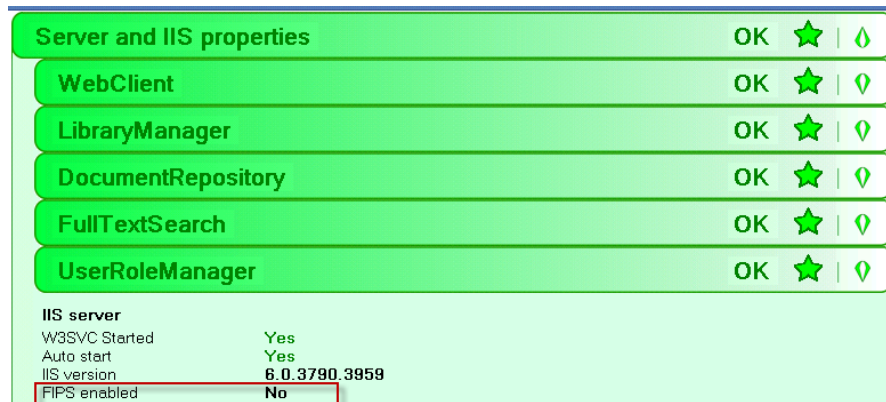
```
<appsettings>
  <add key="urlForDownloads" value="http://QA-2008R2STD64Q/FH/FileHold/webClient/" />
  <add key="LongSqlCommandTimeoutSec" value="900" />
  <add key="WebServiceCallTimeoutSec" value="1800" />
  <add key="FTSReindexBatchSize" value="1000" />
  <add key="MaxDropDownSourceItems" value="1000" />
  <add key="ReportServerActive" value="false" />
  <add key="ReportServerDomain" value="" />
  <add key="ReportServerUser" value="" />
  <add key="ReportServerPassword" value="" />
  <add key="ReportRootFolder" value="" />
  <add key="ReportShowErrors" value="" />
  <add key="CompatibleWF" value="0" />
  <add key="AutoStartWF_SchemaName" value="" />
  <add key="AutoStartWF_workflowName" value="" />
  <add key="InitialOfflineVersion" value="1" />
</appsettings>
```

### 3.30. FIPS COMPLIANCE

FileHold 12 is FIPS (US Federal Information Processing Standards) compliant. The US Federal Government requires compliance in order to meet security and interoperability standards.

Licenses and passwords are encrypted using a FIPS compliant algorithm (3DES) to meet full compliance.

FIPS compatibility can be verified using the Health Checker module.



### 3.31. FDA ONLINE HELP

In FDA, press **F1** to access the online help section of the FileHold website. If the window has context sensitive help, that page will open in a web browser. If there is no context-sensitive help for that window, then the FileHold help home page will open [www.filehold.com/help/home](http://www.filehold.com/help/home).