



FileHold

Document & Record Lifecycle Software

RELEASE GUIDE

VERSION 16.3

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1. FILEHOLD 16.3 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 16.3.

2. SYSTEM REQUIREMENTS CHANGES FOR FILEHOLD 16.3

The minimum requirements to run FileHold that have been changed for this release are listed below.

For a list of full system requirements, visit <https://www.filehold.com/how-to-buy/system-requirements>.

2.1. Microsoft Windows Server

- Windows 2022 Datacenter Edition (64 bit) is supported.
- Windows 2022 Standard Edition Server (64 bit) is supported.

2.2. Microsoft SQL Server

- SQL Server 2008R2 (64 bit) is no longer supported.

2.3. Microsoft Office Integration

- Microsoft Office Professional 2010 is no longer supported.

2.4. Client workstation

- Windows 7 is no longer supported.
- Windows 8.1 is no longer supported.

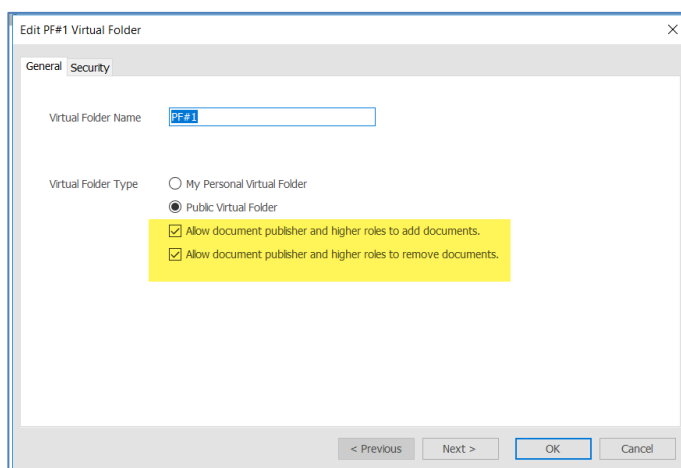
2.5. Browser support

- Microsoft Edge Chromium version is supported.
- Internet Explorer is no longer supported.

3. TEAM VIRTUAL FOLDERS

New options have been added to allow users and groups that have a role of document publisher or higher to add or remove documents.

Administrators are still responsible for creating and maintaining the public virtual folder properties.




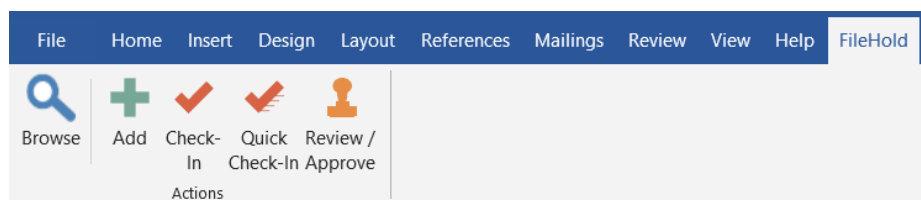
The document usage log includes the two new actions to record documents being added or removed from a virtual folder.

- Added to Virtual Folder
- Removed from Virtual Folder

4. QUICK CHECK-IN

The new “Quick Check-in” option allows users to bypass the FileHold Office Client (FOC) window when checking in a new version from Microsoft Office.

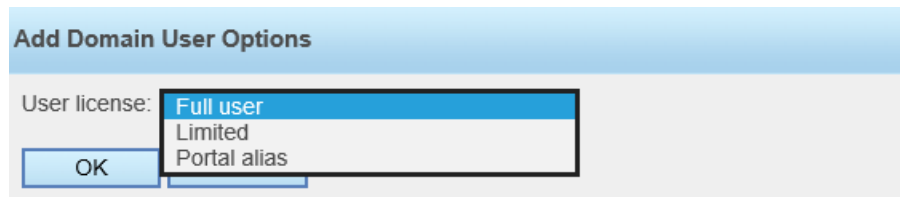
- Upon clicking the **Quick check-in** button , the file is saved if needed and added to FileHold without further prompt.
- Metadata from the prior document version is copied to the new document version.
- The prior document name is copied to the new version.
- When the check-in is complete, the document in the Microsoft Office application is closed and the local file is deleted.
- If the “Clear at check in” option is enabled for a required field, there are no changes to the above except that the FOC window opens in order to fill in the required metadata.



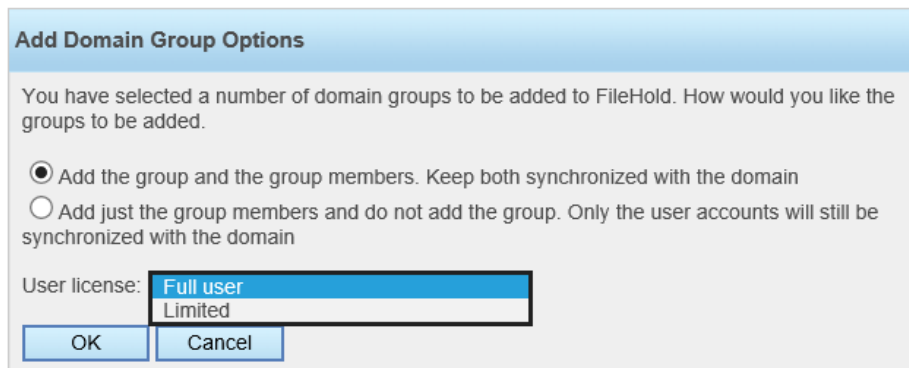
5. USERS LIST ENHANCEMENTS

5.1. Provide option to add domain users as limited

In previous versions of FileHold, domain users and domain group proxy users could only be added as users with a “full user” license type. In this release, domain users have the option to be added with a “full user”, “limited”, or “portal alias” license type.



For domain groups, have the option to be added as “full user” or “limited” license types.



5.2. Option to change user type according to domain proxy changes

Domain proxy users for domain groups allow automatic assignment of FileHold groups to users. However, this has the potential to cause a conflict if a limited user is assigned to a non-limited group. If a limited user is assigned to a non-limited role or a full user is only assigned to limited role group(s) via a domain proxy user, a new web config setting “DomainProxyUser.AutomaticUserTypeChange” in *C:\Program Files\FileHold Systems\Application Server\UserRoleManager* can determine the outcome:

- Elevate – Automatically convert the limited user to full user type and assign group if license is available. Leave user type as is if no license available,
- Lower – Automatically convert the full user to limited user type and assign group if license is available. Leave user type as is if no license available,
- Both – Elevate and lower.
- None – Do not change the user type. This is the default value.

The System audit log captures if user type was changed or if it failed due to no license or due to configuration.

If the assignment failed or if a limited user is assigned to a full group, a notification email can be sent to system administrators according to the setting in a new web config setting

“DomainProxyUser.SendChangeWarning” in C:\Program Files\FileHold Systems\Application Server\UserRoleManager. When the setting is true, a notification email is sent. For example:

- “Limited user is assigned to full group(s). No full licenses are available so they cannot be converted to full. They will not be able to log in.”
- “Full user is only assigned to limited group(s). No limited licenses are available so they cannot be converted to limited.”
- “Limited user is assigned to a full group. Configuration prevents them from being converted to a full user. They will not be able to log in.”

5.3. Account expiration options

The account expiration options in the user properties have been updated for clarification. The user account expiration options now state:

- Follow global policy to <never expire> (or) <expire in x days>.
- Follow global policy to expire in x days or, if sooner, end date of <date>.

Basic Pie full user properties

User license

General

Account Settings

Member Of

Contact Information

General account settings

☒ FileHold Account is enabled for this user

☐ User has guaranteed system access

☐ User must change password at next logon

☐ Exclude user from multi-factor authentication

License options assignment

Associate a viewer license with this user account. The viewer license will entitle the u

Viewer license assignment: FileHold viewer level 3

Associate a web scanning license with this account

☐ Web scanning license assignment

Account expiration

☒ Follow global policy to expire in 75 days.

☐ Follow global policy to expire in 75 days or, if sooner, end of

23.07.2021

The global password expiry is set in the System Configuration > Security > Logon page.

6. FILEHOLD VIEWER ENHANCEMENTS


In this release a new FileHold viewer level 3 license is available. The following tables describes the new functionality and features that are available in the FileHold viewers.

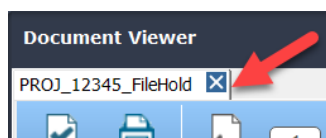
Description	Level 1	Level 2	Level 3
Annotations - comments		X	X
Annotations – multi-user tracked		X	X

Description	Level 1	Level 2	Level 3
Annotations – view only (minimum L2 license required to view annotations in Microsoft Word (.docx) files)	X		
Redaction – add or edit			X
Redaction – view only	X	X	
Bookmarks panel - view	X	X	X
Support viewing new file types such as PowerPoint and email		X	X

For users with level 2 or 3 viewers, annotations are now locked down to their owner which means only the user who created the markup can edit their own annotations. Annotation created by other users are displayed in read-only mode with the exception for cabinet administrator or higher roles. Administrators can remove any annotations but cannot modify them. Users can only remove pages that do not contain annotations or if all the annotations are created by them. In other words, page removal is not possible if it contains annotations created by another user. Administrators can remove any pages.

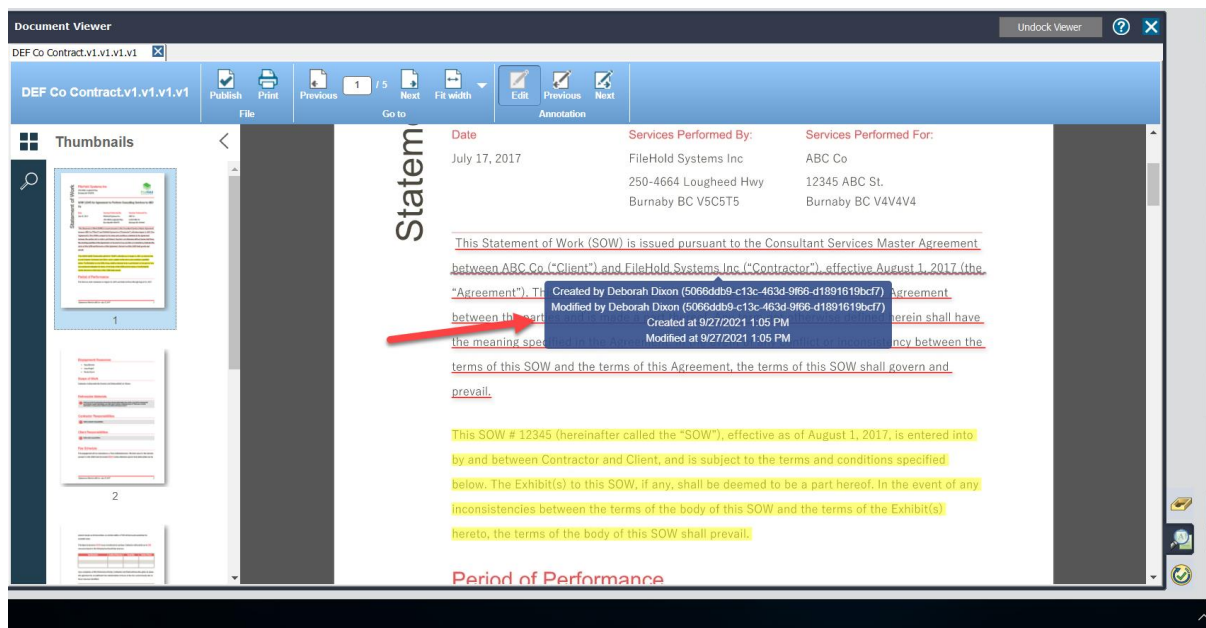
When a user is annotating a file, it cannot be modified or checked out by another user. When the user has completed the markup and attempts to leave the viewer, the user is prompted to save the markup. In order for the document to be unlocked from annotation mode, the current user must do one of the following to leave annotation mode:

- Click the [Edit](#) button .
- Close the viewer tab in the FDA:



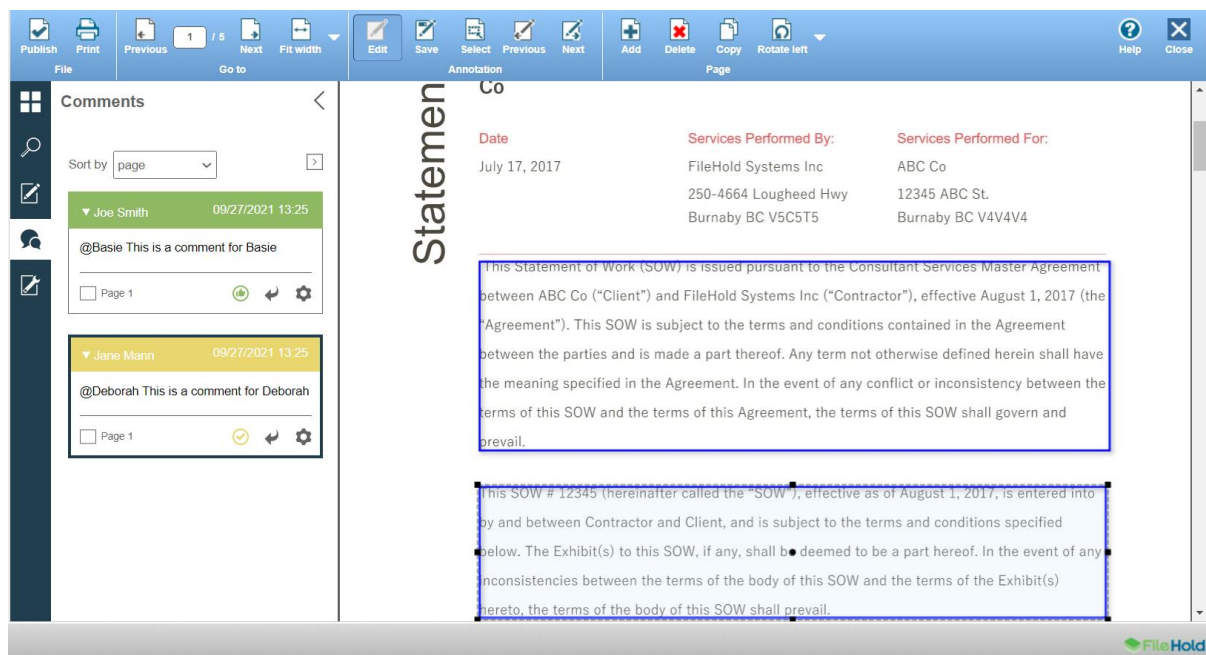
Annotation mode is automatically ended within 24 hours.

Since annotations are locked to their owner, the owner's name, and the creation and modification dates are now displayed for each annotation. To display the annotation owner information, select the annotation and hover over it.



6.1. Comments

Comments are available in the levels 2 and 3 viewers. The comment feature allows users to comment on specific text or areas on a page. A new comments section is available in the viewer panel. The author is automatically set to the user's name. Comments can be directed to other users using the @ symbol.



Once the annotations are saved, email notifications are sent to the users that have been mentioned in the comments. The link in the email takes the user directly to the comment in the document. Emails are sent according to the user preferences.

1 comment notification(s) follow. Your notification frequency preference is Immediately.

Action: You were mentioned in 2 document comment(s)

Reply to comment(s) in [Web](#) or [Desktop](#) client.

Comment 1	@renee Please update this section with the correct steps.
Comment 2	@renee This section needs to be updated with new information.
Comment date	10/19/2021 2:40 PM
Comment made by	Basie Pie
Document version name	Creating FastFind Templates (Mobile) (Desktop)

Notification(s) generated by FileHold System. Send email to [\[redacted\]](#) for more information.

A status can be applied to the comments after their creation: approved, cancelled, finished, rejected. The colour and icon of the comment changes according to the status.

Edit comment

Author

Joe Smith

Message

@Basie This is a comment for Basie

Status

Approved

None

Approved

Canceled

Finished

Rejected

Cancel

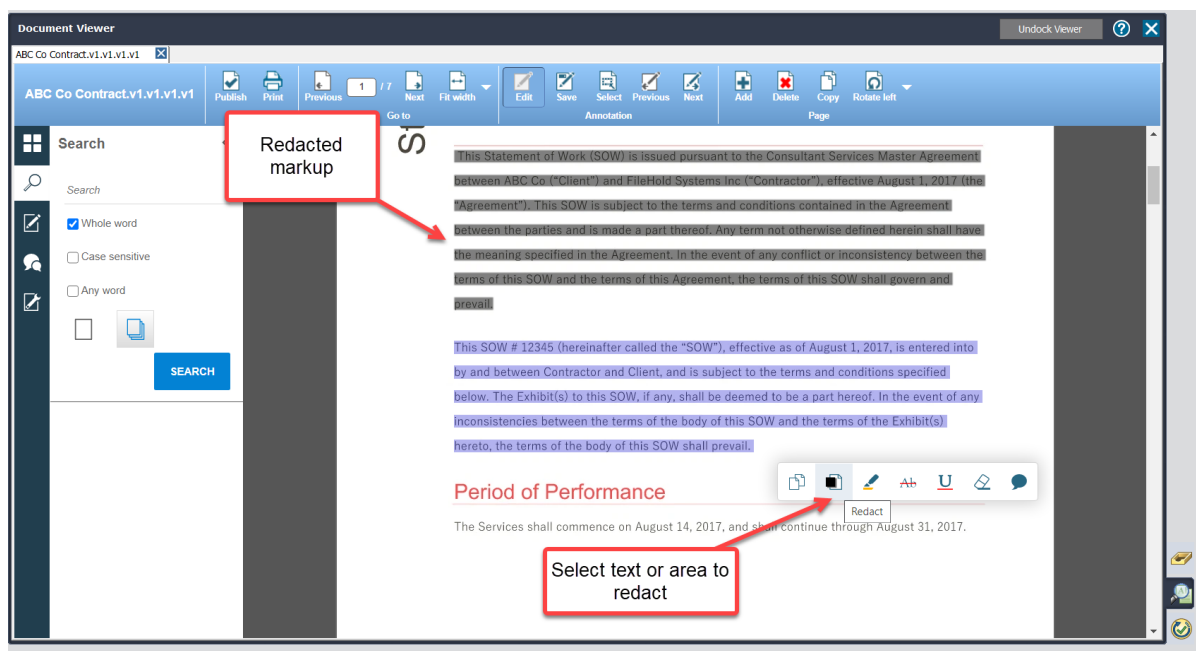
Delete

SAVE

6.2. Redaction

Redaction is available in the FileHold level 3 viewer. Redactions are used to conceal sensitive information for legal, financial, privacy, and security reasons, for example. Redactions associated with the published document version can never be edited or removed by the end-user and the text and images beneath the redaction entities can not be viewed, copied, or searched.

You can redact text, areas, pages, images, or use the search function to find and redact. To apply the redaction, the document must be published otherwise the redaction remains as a part of the markup layer and can be modified by users.



After publishing, the redacted content is unreadable and not searchable.

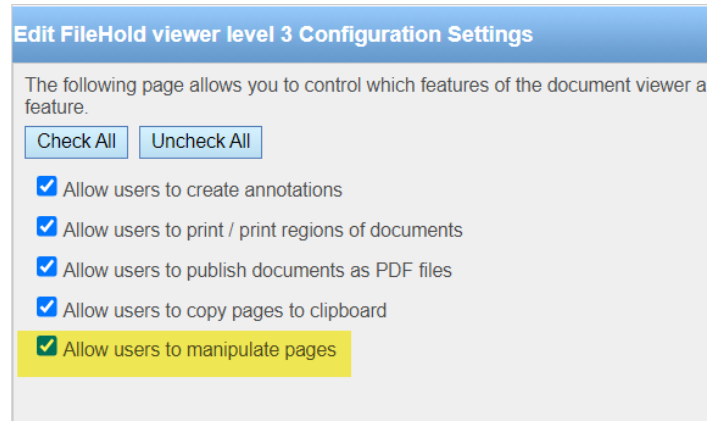


The redaction colours can be modified in the web config file in C:\Program Files\FileHold Systems\Application Server\WC2. The following keys can be added to set the pre and post redaction colours:

- `<add key="Viewer.PreRedactionColor" value="<hex value>"/>`
- `<add key="Viewer.PostRedactionColor" value="<hex value>"/>`

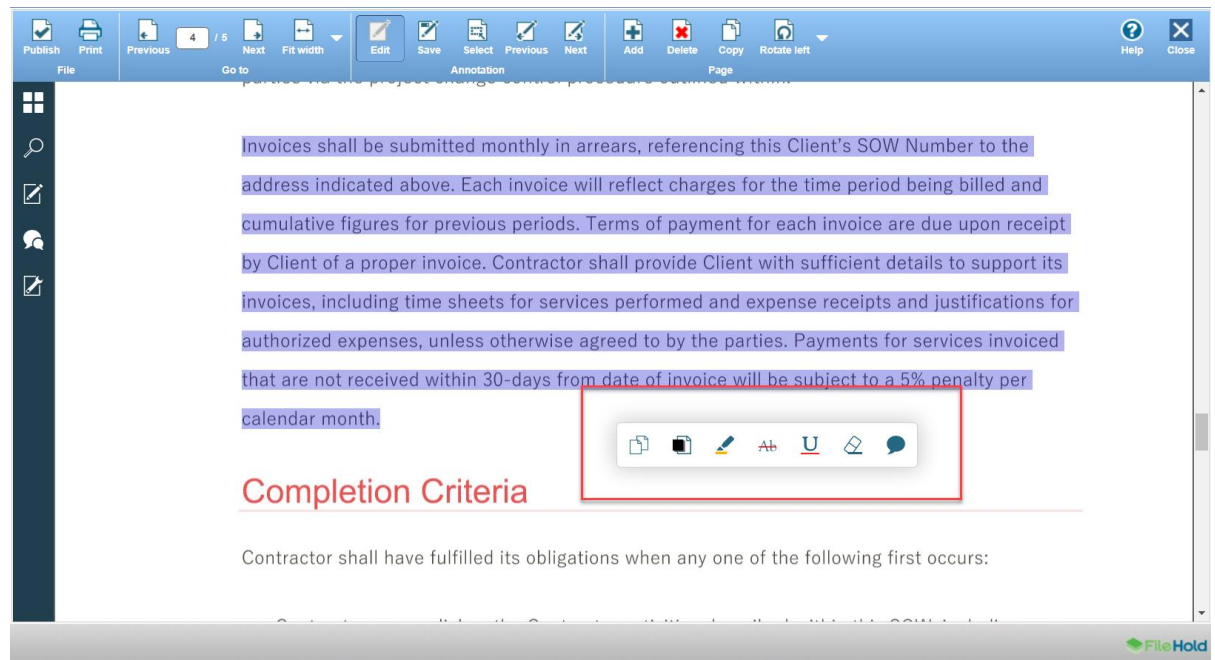
6.3. Viewer configuration change

A new viewer configuration setting is available for all three viewer levels. The permission setting “Allow users to manipulate pages” must be enabled in order for users to add, rotate, drag and drop thumbnails, or remove pages from a document.













6.4. New context toolbar icons

When text, area, or an existing annotation is selected on a page in the viewer, a new context toolbar appears for those with levels 2 and 3 viewers.



The following table describes the icons in the context toolbar.

Icon	Description
	Copy selected text
	Select text area

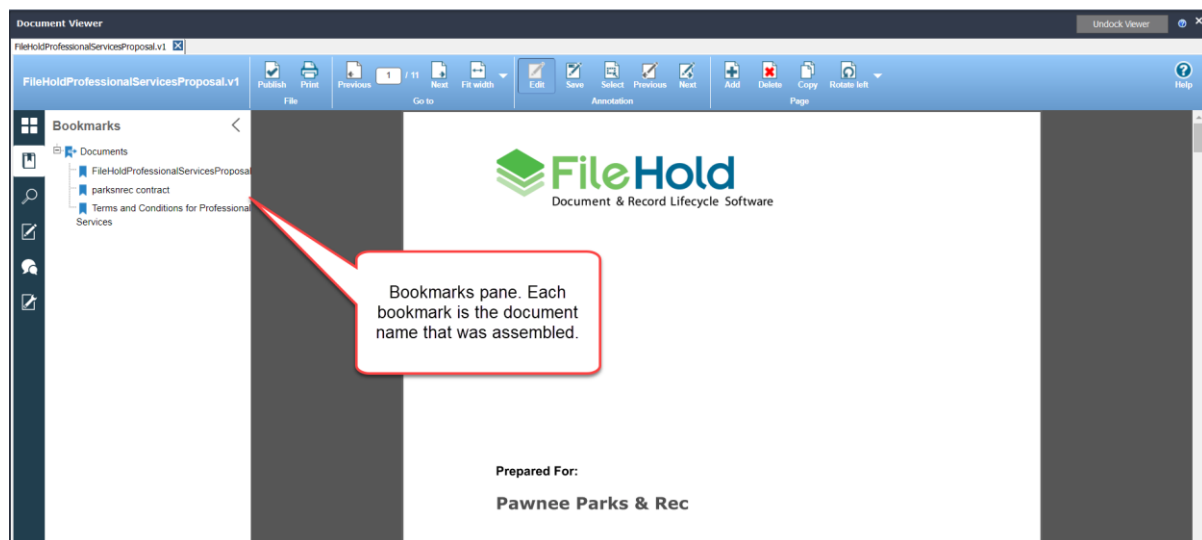
Icon	Description
	Redact
	Highlight
	Strikeout
	Underline
	Erase
	Comment
	Edit annotation properties
	Delete annotation

6.5. Bookmarks pane and document assembly

Bookmarks can now be viewed in the Bookmarks pane .

If using document assembly, bookmarks are added to the PDF for each file when merging files. The bookmark name is the document name.

Document assembly requires a FileHold viewer level 2 or 3. All viewer levels can view bookmarks.



6.6. New supported file formats

The following file formats have been added or changed in the FileHold level 2 and 3 viewers:

- XLS
- PPTX
- PPT

- MSG (preview feature)
- EML (preview feature)
- AI
- HEIC
- HEIF
- JBG
- JBIG
- JFI
- JPC
- JPF
- JPG2
- JPM
- JPX
- SUN
- WEBP
- Replaced DICOM with DCM
- Removed EXIF

6.7. Double-click to open document in undocked FileHold viewer

In previous versions, when a file was double-clicked on in the FDA, it was downloaded and opened in its native application. In this release, the behaviour for double-clicking can be set to open a file in an undocked FileHold viewer screen. The file type needs to be supported by the FileHold viewer in order for this setting to work. A key setting "FDA.DoubleClick" can be configured in the Library Manager web config file. The available values are "OpenNative" and "OpenViewer". The default is opening the file in the native application.

6.8. Suppress the viewer side panel by default

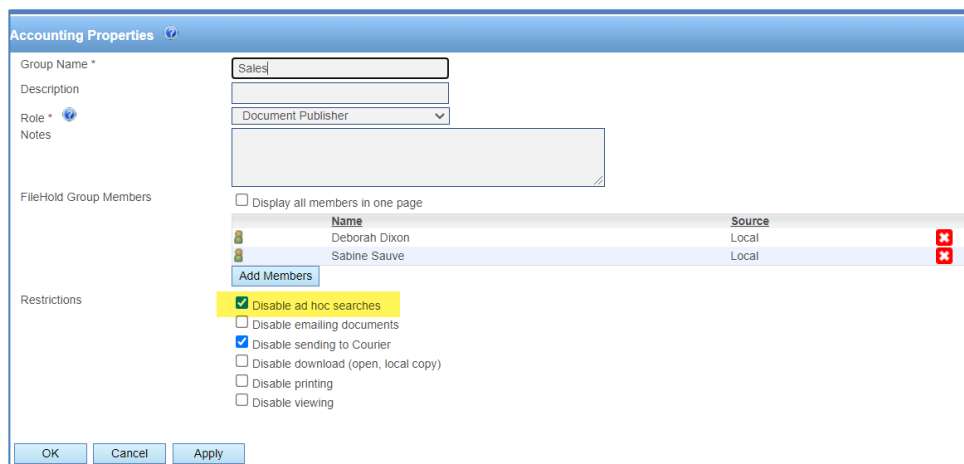
Currently the side panel is always opened when a document is opened for viewing. There are a number of use cases where this is not needed. To disable the side panel, add the key "Viewer.ShowThumbnails" and set it to "false" in the web config file in *C:\Program Files\FileHold Systems\Application Server\WC2*. By default, the value is true. If the value is set to false, a user can still open the side panel by clicking any of the panel icons.

7. SEARCH ENHANCEMENTS

7.1. Disable ad-hoc searches for groups

While ad-hoc searches are powerful, they can also be performance hogs on the system if poorly designed. Some users never have the training necessary to perform or plan well-formed ad-hoc searches such as guests or infrequent users. In order to prevent such users from

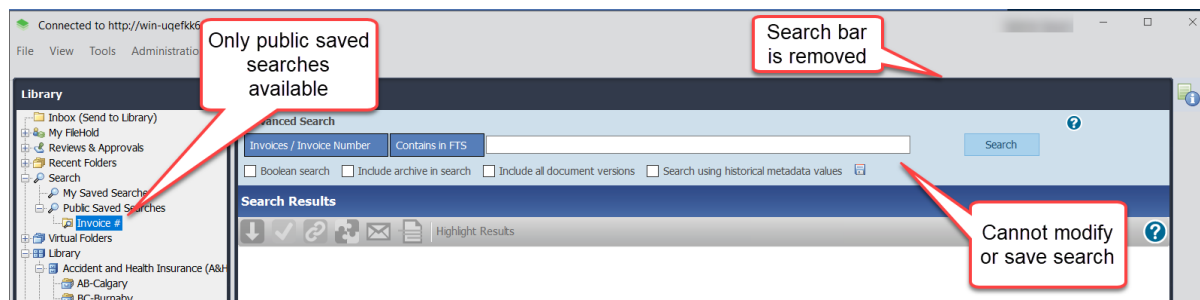
negatively affecting system performance, a permission setting for a group can now disable ad-hoc searches.



If all the groups a user belongs to have this setting enabled, all searching capabilities are removed except if the group is a member of a public saved search.




The ability to create, modify, or save a search is removed. All search bars are removed. Searching from the library structure (right-click > Search) is removed. Clicking the Search node in the library tree does not start a search.

The only searches that a user that has ad-hoc searching disabled can perform are public saved searches. An administrator needs to configure these for groups that have ad-hoc searches disabled.



7.2. Quick searches available from Simple search bar

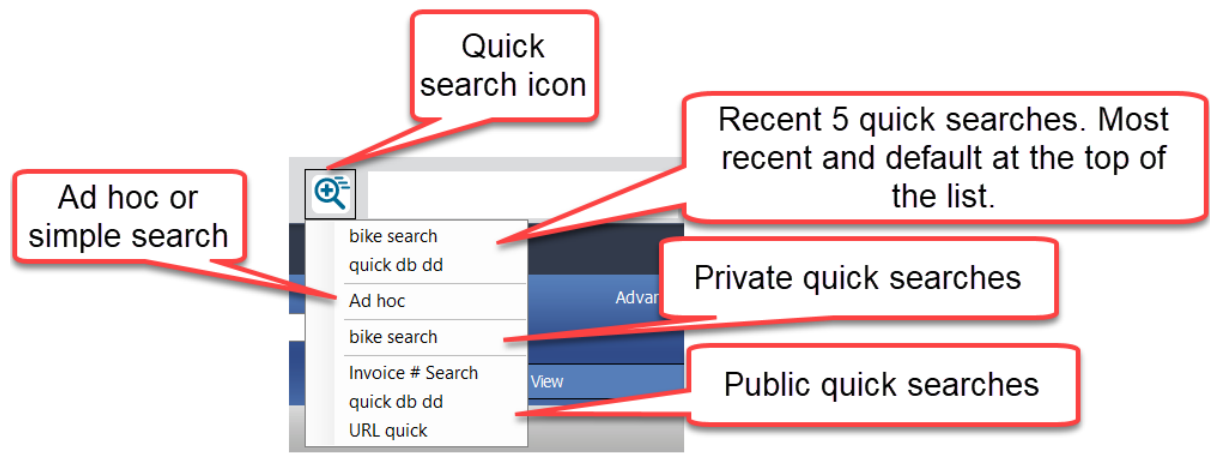
A quick search and simple search are very similar in that they both take a single value as a parameter. The ability to perform a quick search from the simple search bar has been added in this release. The new search bar icons in the FDA and Web Client can be used to:

- Perform an ad-hoc search . This type of search is the same as a full-text search or simple search.
- Perform a quick search .
- Start an advanced search .

The ad-hoc and quick search icons change depending on the item selected in the search menu. The search menu is ordered by:

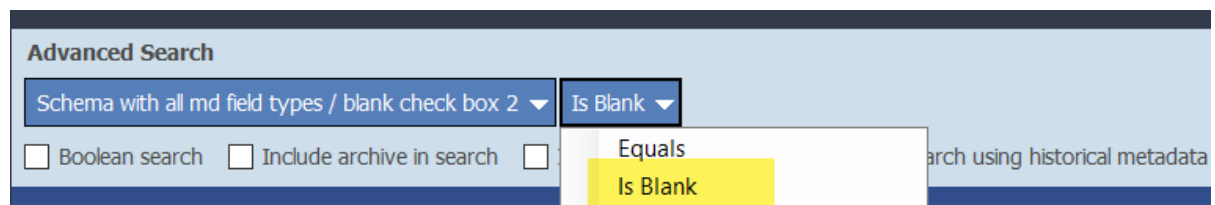
1. The last 5 recent quick searches. The default quick search is the most recently used and is displayed at the top of the list.
2. Ad hoc search.
3. Private quick searches.
4. Public quick searches.

For the displayed quick searches, only “contains” type searches are displayed. There are no options for dates, drill-down or drop-down menu type searches. These types of quick searches are available from the list in library tree.



7.3. Search for blank check box field

FileHold now provides the ability to search on blank check box metadata fields. This type of search can be used in the event that a check box type metadata field is added to a schema but documents belonging to that schema already exist in the system and therefore, the check box value is “blank”.



7.4. Search performance improvement

Prior to version 16.3, any full text search criteria were passed to the full text search engine before any database search criteria was considered. Searching can now send “pre-filter” information to the full text search engine to reduce the number of documents to apply the search criteria against. There are two criteria that pre-filter documents:






- Schema – The search has one or more criteria that identify one or more schemas.
- Library location – The search has chosen a library location.





Note that these two options may be selected in combination to further fine-tune the possible list of documents. This reduces the time for searches with a very high occurrence of hits in the full text index that cross schema or folder boundaries. This also improves relevance values as fewer search results are excluded after the database portion of the search.

8. FDA TOOLBAR BUTTONS

The toolbar icons in the FileHold Desktop Application have been refreshed. New icons have been added to the toolbar. The “Email and check out” icon has been removed; however, this function is still available through the right-click action.

The following table describes the new toolbar icons:

Icon	Description
	<p>Add document.</p> <p>Enabled when a user can add a document.</p> <p>Disabled when a user cannot add a document.</p>
	<p>Add offline document.</p> <p>Enabled when a user can add an offline document: there is at least one schema where the user is a member, the user is an administrator, or has permission to convert documents to offline.</p> <p>Not visible when offline documents are not configured in the system for the user.</p> <p>This button can be hidden if the key “Display.EnableOfflineButton” in the Library Manager web configuration file is set to “false”. By default, it is set to “true”.</p>
	<p>Make a local copy of the document.</p> <p>Enabled when a user can download a copy of a document.</p> <p>Disabled when a user cannot download a copy of a document.</p>
	<p>Check out a document.</p> <p>Enabled when a user can check out a copy of a document.</p> <p>Disabled when a user cannot check out a copy of a document.</p>
	<p>Link.</p> <p>Enabled when a user selects more than one document to link together.</p> <p>Disabled if there are no documents to link together.</p>

Icon	Description
	<p>Assemble documents.</p> <p>Enabled if a user can assemble documents.</p> <p>Disabled if the user does not have a FileHold viewer level 2 or 3 license and the “Display.LicenseWarning” key is false in the web config file of C:\Program Files\FileHold Systems\Application Server\LibraryManager. If the key is true and the user does not have a license, a warning message displays.</p>
	<p>Email.</p> <p>Enabled if a user can email documents.</p> <p>Disabled if a user cannot email documents.</p>
	<p>Send a Courier transmission.</p> <p>Enabled if Courier is enabled and there is a template associated with the schema.</p> <p>Disabled if Courier is disabled and if there is no template associated with the schema.</p>
	<p>Delete.</p> <p>Enabled if a user has permission to delete the document.</p> <p>Disabled if a user does not have permission to delete the document.</p>

9. LINK BY METADATA FIELD

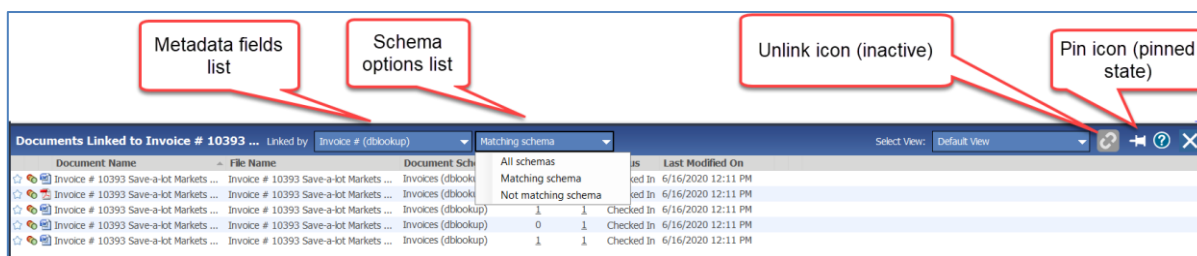
In previous versions of FileHold, the only option to link documents was by a user. Since users are typically looking for related documents, this release now adds the ability to show documents in the Linked Documents panel that are related by:

- A metadata field value in all schemas.
- A metadata field value and matching schema.
- A metadata field value and not match the schema.

This reduces the manual effort of users to manually link documents together.

The selected linking option is maintained when the Linked Documents panel is opened. The default is saved across sessions and the default values can be the value of the view setting.

Manually linked documents can be unlinked using the new Unlink icon  in the Linked Documents panel. The panel can also be “pinned” in place so it is always presented with the main document panel.

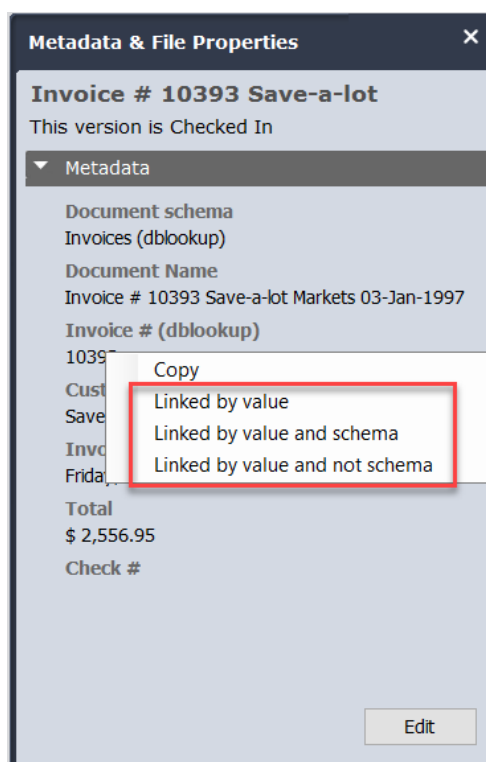


9.1. Finding related documents from the metadata pane

Three new options are available in the FDA metadata pane that allow users to find documents with related metadata. A user can right-click on a metadata field in the pane and select one of the options:

- Linked by value
- Linked by value and schema
- Linked by value and not schema

The documents matching the selected option are displayed in the Linked Documents pane.



10. DATABASE LOOKUP ENHANCEMENTS

10.1. Mass updates using the “Lookup” button

If an administrator has configured the schema to use database lookups, you will see a Lookup button in the Metadata pane. Clicking this button after entering or selecting the value from the configured database drop-down menu metadata field retrieves any mapped values from the database into the remaining metadata field values of the schema. This can reduce the amount of time it takes to index a document with metadata. In previous versions, a schema lookup could only be performed on a single document at a time. With this release, you can now perform a schema lookup for several documents at once. For example, if you are adding or modifying five documents with the same project number, and you have a lookup configured to use the project number, the lookup can be completed on all five documents at a time.

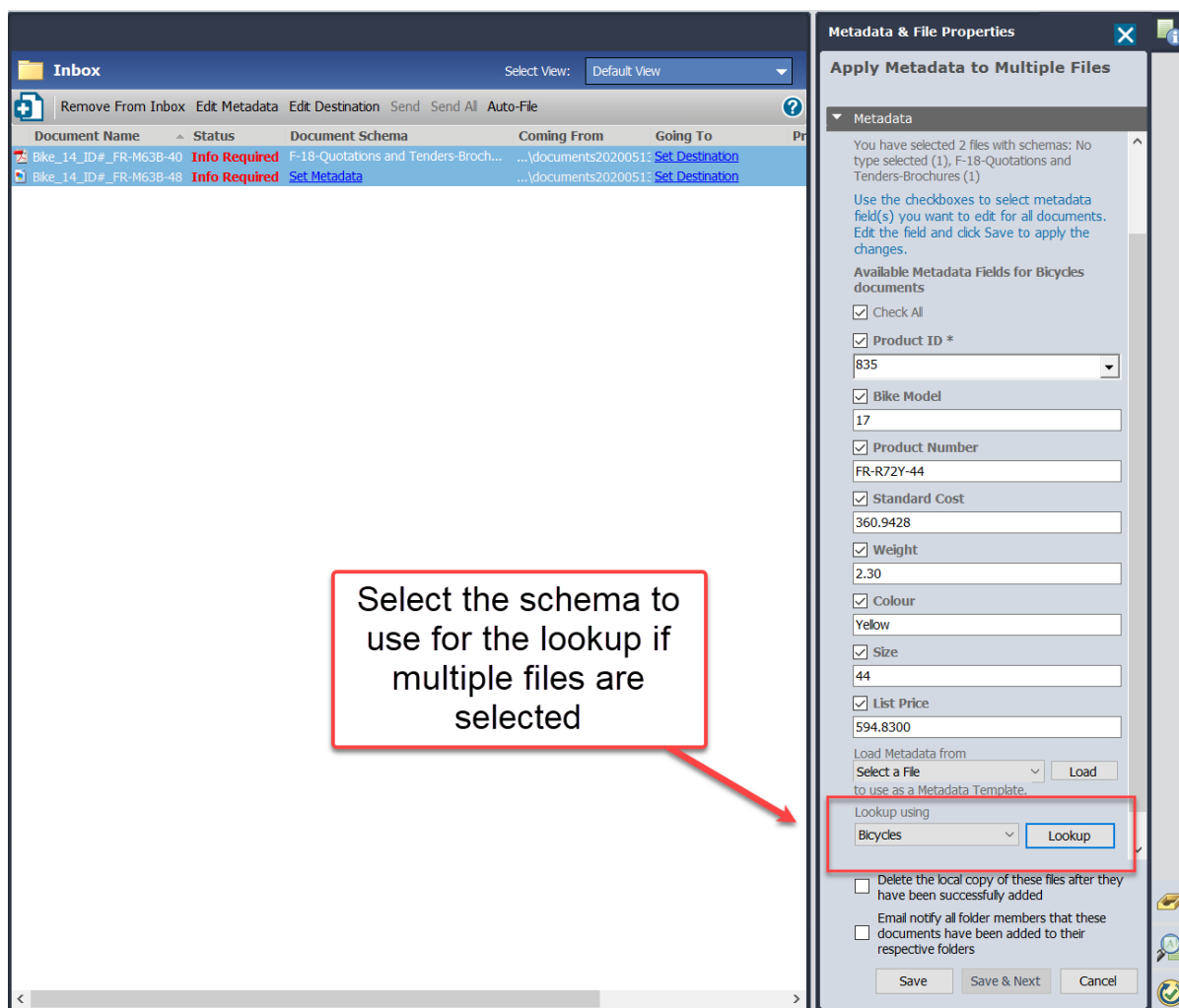
The lookup is done on the key field so it is possible that there could be more than one schema in the selected documents which means there could be more than one schema lookup definition. The following rules determine what happens when the user presses the Lookup button and there is more than one schema:

- If only one schema has a lookup defined, that definition is used.
- If more than one schema has a lookup defined, the user is prompted to choose the correct schema. The drop-down menu lists the schemas that have a lookup definition where the lookup by is one of the common fields. By default, the first schema in the list will be selected.

If the selected lookup definition includes destination fields that are not among the common fields, these will be ignored (not filled by the lookup).

For the custom query cases where there can be multiple lookup-by fields, the rule is the same, but only if all lookup-by fields are not displayed for all schema lookups. If the selected schema lookup uses a custom query with multiple lookup-by fields and one or more of the fields is not displayed, there is a warning message: "There are lookup-by fields defined that are not displayed for one or more of the selected documents: <field-name-list>. Not displayed fields will use a blank value in the lookup."

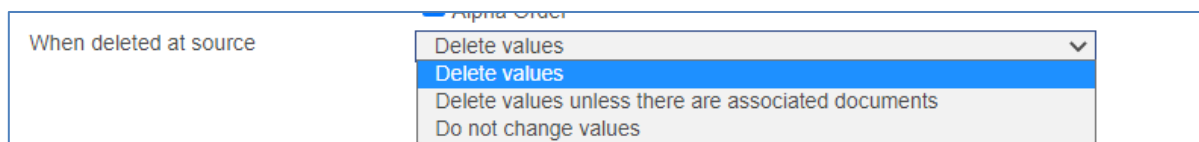
If a lookup is completed and it modifies one or more fields that are not displayed, a warning message is displayed: "The lookup will change fields that are not displayed for one or more of the selected documents: <field-name-list>."



10.2. New delete options for database dropdown menu synchronization

In previous versions, database dropdown menus had the option to prevent the deletion of the metadata field values when deleted from the source database. In this release, new options are available when a value is deleted at the source:

- **Delete values** – If the value is deleted from the source database, the value is also removed from the metadata field in FileHold. Upon upgrade, if the Prevent Deletion option was disabled, this option is selected.
- **Delete values unless there are associated documents** – If there are documents that contain the values that have been deleted from the source database, the values remain untouched in FileHold. **NOTE:** If you assign a value then remove the value, it still exists in the metadata history and is not deleted. When the document(s) are eventually deleted, the value is removed at the next synchronization where the value does not exist in the source data.
- **Do not change values** – Does not change the metadata field values in FileHold when deleted from the source database. Upon upgrade, if the Prevent Deletion option was enabled, this option is selected.

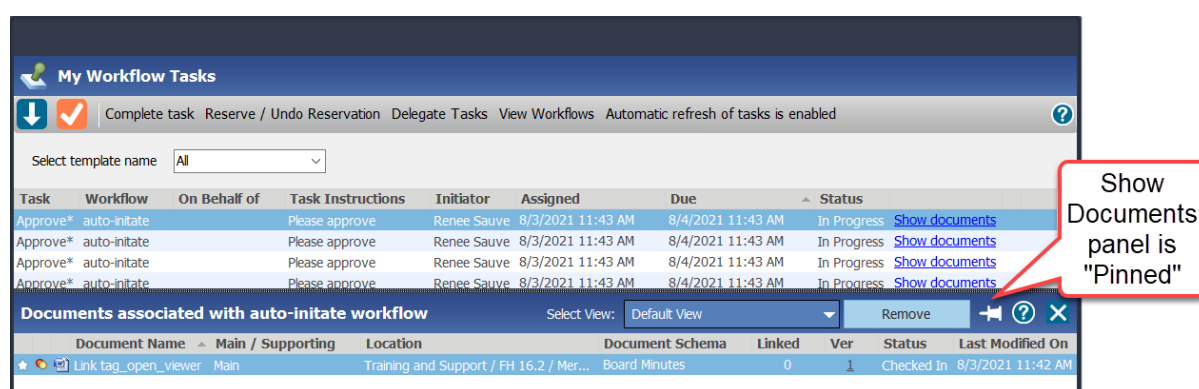


11. WORKFLOW ENHANCEMENTS

A number of changes have been made to the workflow module.

11.1. Pin the Show documents panel

The Show Documents panel now has the ability to be “pinned”. When pinned, the panel is always open on the My Tasks list while displaying the documents for the selected task.



11.2. Additional filters for the administration workflow status report

The following filters have been added to the administration workflow status report:

- Workflow template name contains – Matches to the workflow template name. SQL wildcards can be used.
- Document schema – Matches to a particular document schema. Displays a list of document schemas.
- Current activity participant – Matches a participant to the current workflow activity. If the task is delegated, it matches to the delegated user. If the task is overridden or void, there is no match. If a task is reserved, matches to the participant that holds the reservation.
- Current activity overdue or due in x days – Enter the number of days the task is or will be overdue. A value of 0 is due today. If no value is entered, only overdue tasks are displayed.
- Workflow contains activity type – Matches to the activity type. Options include: review, approve, or external signature.
- Workflow guid equals – Returns to the GUID of the workflow.
- Workflow task guid equals – Returns the workflow with the matching GUID.
- Document id equals – Returns the workflow with the matching document ID.

A Show/Hide filter options button is also available. After a report is executed, the last filter options are remembered for next time. Filter options not in use are hidden until the Show filter

options button is clicked. You can prevent workflow filter options from being hidden by making them “pinned” and “unpinned” as needed.

Workflow management

Workflow status report

Workflow delegation

External signing report

Library management

System management

Administration reports

System configuration

Library configuration

Solo mode

Reviews & Approvals Status Report

Workflow Status Equals: In Progress

Due Date: From 8/4/2021 To 8/4/2021

Workflow Name Contains:

Workflow template name contains: contr

Hide filter options

Completed Between: 0 % and 100 %

Date Started: From 8/4/2021 To 8/4/2021

Document Name Contains:

Initiator is: Basic Pie

Document schema is: Notes

Current activity participant is: Basic Pie

Current activity overdue or due in: days

Workflow contains activity type: Approval

Workflow guid equals:

Workflow task guid equals:

Document id equals:

Apply Filter

Workflow Name	Main / Supporting	Initiator	Started	Due	Completed	Status
Contracts - SOWs, Pawnee Parks & Rec_Aug-04-2021	1 / 0	Show Documents	8/4/2021 2:39 PM	8/10/2021 2:39 PM	0%	Pending Approval

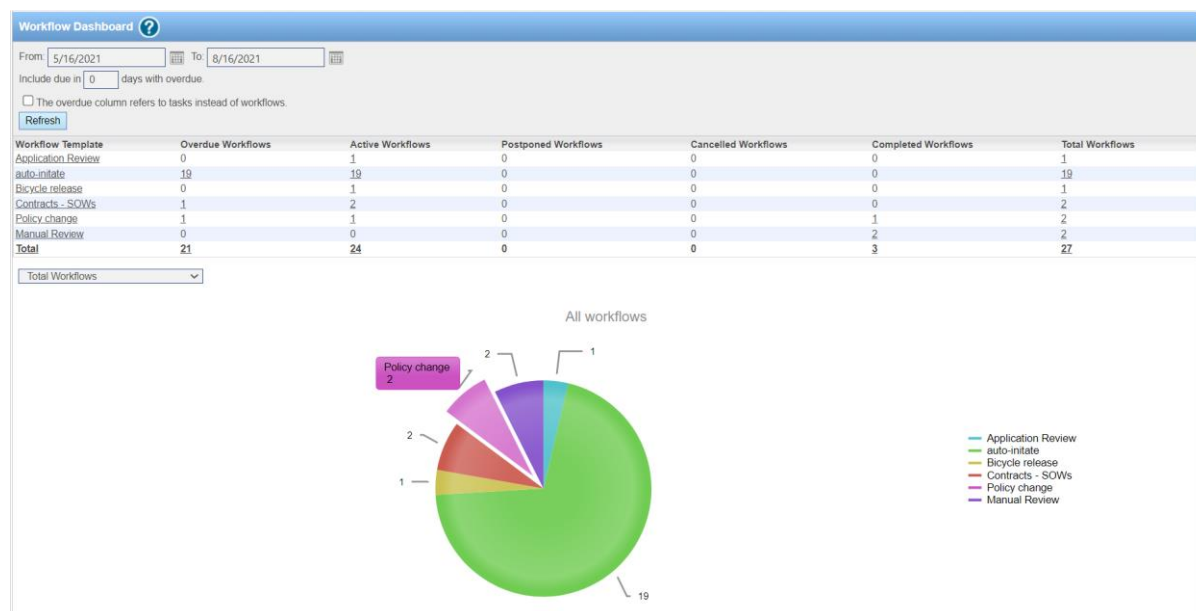
Page size: 10

Displaying page 1 of 1, items 1 to 1 of 1.

11.3. Workflow dashboard updates

A number of improvements have been made to the Workflow Dashboard.

- A new interactive chart. Clicking on sections of the pie displays workflow information. The chart can be filtered by total, overdue, active, postponed, cancelled, and completed workflows.
- The columns have been reorganized by operational importance.
- The option to search on the potential of overdue workflows or tasks. For example, if set to 1, all workflows or tasks that are due today or are already overdue are shown. If set to 7, all workflows or tasks due 7 days from now or already overdue are displayed. By default, this is set to 0 which displays only overdue workflows or tasks.
- The option to display the number of overdue tasks instead of overdue workflows in the Overdue Workflows column.
- Non-zero numbers of workflows are in the table are hyperlinks. Clicking on the hyperlink is linked to the workflow status report. The workflows associated with the value is displayed.
- Clicking the workflow template names changes the filter criteria for the chart. Clicking the “Totals” link returns the chart back to using all templates.



11.4. Hide all but the current approved version

FileHold has a schema option to hide all document versions that are not marked as approved by a workflow. In the normal lifecycle of a policy, design or similar document, more than one version of the document may be approved. It is, however, common for various quality processes to require that the only document available is the current approved version. This release adds a feature that can be controlled using the key setting “Library.HideAllButLatestApproved” in Library Manager web config file. The default is false, so the normal product behavior is unchanged from the current version. If set to true, and the schema option to hide until approved is enabled, it hides all but the current approved version in the library.

11.5. Open Adobe compose screen in independent browser instead of FDA

If using the FDA to send documents to Adobe Sign, they can be composed in both the FDA and now, in an independent web browser page. A new option in the Library Manager web config, “ExternalSignature.OpenIndependentAuthoringWindow”, can be set to “true” in order to compose Adobe Sign documents in a web browser. The default is set to “false” which maintains composition in the FDA.

11.6. Override an Adobe external signature activity

It is now possible to override a task when a document is at Adobe Sign for signature. This option can be used in the event that a document is sent to Adobe Sign but the signature is effectively optional.

If a task is overridden, the status of “Overridden” is displayed in the workflow status report as with other overridden tasks. In the Adobe audit report, the status is Canceled/Declined. In the External Signing Report, the status is Aborted.

Override DS		1 / 0		Show documents		sysadm sysadm	8/17/2021 11:46 AM	8/18/2021 8:01 PM	75%	Pending Approval	View details	Changes
Activity	Type	Task	Participant	On Behalf of	Comments	Attachments	Started	Due	Completed	Status		
1	Approval	1	sysadm sysadm				8/17/2021 11:46 AM	8/18/2021 11:46 AM	8/17/2021 11:47 AM	Approved		
2	Send for external signature	1	sysadm sysadm*				8/17/2021 11:47 AM	8/18/2021 11:47 AM	8/17/2021 11:51 AM	Sent		
3	Wait for external signature	1	Adobe Sign				8/17/2021 11:51 AM	8/18/2021 11:51 AM	8/17/2021 8:01 PM	Overridden		
4	Approval	1	sysadm sysadm				8/17/2021 8:01 PM	8/18/2021 8:01 PM		In Progress		

11.7. New filter options when adding documents to a workflow

When adding supporting or main documents to a workflow, it is now easier to locate the active workflows to add the document to. New filter options have been added to the Add Documents to Existing Workflow screen:

- Active workflow task assigned to me
- Postponed workflow initiated by me
- Workflow template name

The document type option now defaults to “supporting” instead of “main” documents. All selections are maintained between uses.

Add Documents To Existing Workflow

Workflow filter:

☒ Active workflow task assigned to me

☐ Postponed workflow initiated by me

Workflow template: Manual Review

Select the workflow to add:

Workflow	Main	Policy change	Started	Due	Completed	Status			
Manual Review	1 / 0	Show documents	sysadm	8/13/2021 2:05 PM	8/18/2021 2:05 PM	0%	Pending Review	View details	Ch...

Add the selected documents as:

☐ Main documents that are reviewed or approved in the workflow

☒ Supporting documents associated with the workflow

OK Cancel

11.8. EchoSign is now Adobe Sign

Adobe Sign is discontinuing support for the EchoSign domain. FileHold will now use the Adobe Sign domain for all new connections to Adobe Sign.

11.9. Adobe Sign UriToWorkflow

{{UriToWorkflow}} is a read only tag for an Adobe Sign document that expands to a link that can be copied or clicked to view the documents associated to the External signature workflow in FileHold. In previous versions, the link could only be used with the Web Client. The link can now point to the FileHold Desktop Application (FDA). The key in the Library Manager web config “Workflow.AdobeUriToWorkflowDestination” can be set to either the “WebClient” or “FDA”. By default, is set to the web client URL.

11.10. Updates to server plug-in hooks

Server plug-in hooks allow custom extensions to the application server.

- Cancellation message can be removed when a new workflow is started.
- A new workflow can be started regardless of whether the template belongs to the schema.
- A workflow can be terminated silently. The plug-in can determine that a workflow should not be started and it is silently cancelled.
- A new hook has been added to document lifecycle processing events and can be triggered at notification or event time.

The standard workflow plug-in option has been updated to take advantage of these new features.

12. USER DEFINED EVENTS ENHANCEMENTS

User defined events send an email and/or document alert to recipients to notify them of an important date or event. Dates can now be aligned to specific starting dates such as month, quarter, calendar, or fiscal year. The “None” option does not align the event date to any start date and works as in previous versions.

For example, for insurance certificates that must be renewed every year at the start of the fiscal year, the team wants to set up a notification 30 days prior. The alert repeats every year.

Add Event

Name * Renew Insurance Certificates

Description Renew every fiscal year

Event Properties

Type User Defined

Relative To

- ☐ Document created date
- ☐ Document last modified date
- ☐ Metadata last modified date
- ☒ Custom metadata field
 - Select: Expiration Date

Align date to Fiscal year

Period 1 years

☒ Recurring Event

Notifications

- ☒ Send 30 days before the event occurs.
- ☒ Email message
- ☒ Document alert

Recipients

- ☒ Notify Document Owner

Save Cancel

The start date of the fiscal year is set in the key “Event.FiscalYearStart” in the web config file in *C:\Program Files\FileHold Systems\Application Server\LibraryManager*. The default is April 1.

13. USING MERGE TAGS WITH MICROSOFT WORD DOCUMENT PROPERTIES

The ability to link metadata and system values using merge tags to the document properties in a Microsoft Word document has been added to this release. When the document is downloaded or viewed, the current metadata values are displayed. Typically merge tags are used when the output file is a PDF, but this opens the possibility for using merge tags with documents that will be maintained only in Microsoft Word.

The processing necessary to update the values in the Word documents happens whenever the document is viewed or converted to PDF in a workflow. For users with a FileHold viewer level 2 or 3 license, the values are updated every time the document is downloaded to their workstation or used in document assembly. The supported file types include: .doc, .dot, .docx, .docm, .dotx, .dotm, .rtf, .odt, and .ott.

A new key "EnableOfficeCustomPropertyUpdates" must be set to "true" in the Library Manager web config file to use this feature.

Specific merge tag processing is enabled by including a merge tag in a Word document custom properties name. Refer to the Microsoft Word help to learn how to add custom properties for your particular version of Word.

Properties

General Summary Statistics Contents Custom

Name: Add Delete

Checked by
Client
Date completed
Department
Destination
Disposition

Type: Text

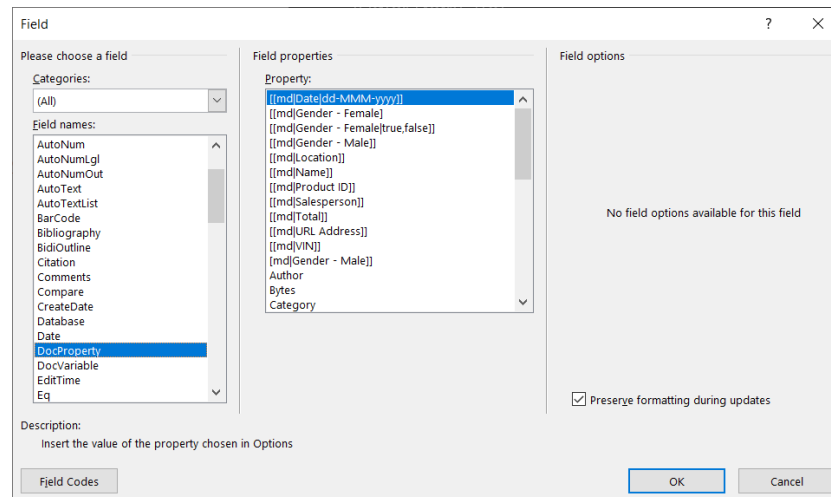
Value: ☐ Link to content

Properties:

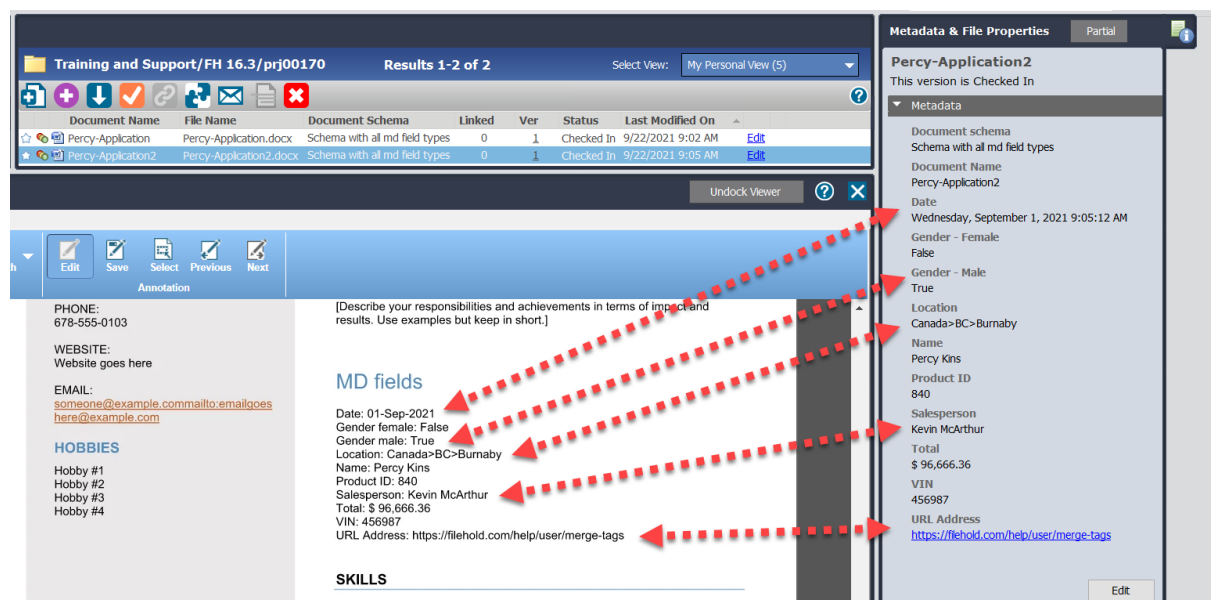
Name	Value	Type
ContentTypeId	0x01010079...	Text
[[md Date dd-MMM-...	22-sept-2021	Text
[[md Gender - Female]	false	Text
[[md Gender - Male]	false	Text
[[md Location]]	Burnaby	Text
[[md Name]]	test	Text
[[md Product ID]]	830	Text
[[md Salesperson]]	Kevin McArt...	Text

OK Cancel

In the Word document, the merge tag properties are added using the DocProperty fields. Refer to the Microsoft Word help to learn how to add fields for your particular version.



Once the document is added to FileHold and metadata values are entered, they can be viewed in the viewer or downloaded to Microsoft Word.



14. EXPORT SCRIPTS

FileHold data can be automatically exported to other systems upon a workflow activity completion. For example, invoices can be sent to an ERP or accounting system to help automate invoice processing.

An export script is a combination of dot net executable code installed on the FileHold server and the script configuration. The executable code can be created by customers, resellers and FileHold Professional Services team. The export script definition contains a dll and the parameters for export. It is possible that the same script dll could have more than one configuration effectively creating more than one export script. Export scripts are located in the

Administration Panel > System Configuration > Settings menu and are managed by a system administrator.

FileHold User: sysadm | Help | Log Out

Collapse all

My FileHold

- Workflow management
- Library management
- System management
- Administration reports
- System configuration
- Settings
 - General
 - Search
 - Document viewers
 - Notifications
 - Custom reports
 - Export scripts
- Security
 - Document repository locations
- Client options
- Library configuration
 - Solo mode

Manage export script sample

General Parameters

Name: Export invoice data

Description: Exports invoice data to Great Plains

Batch job owner: Basic Pie X

Script DLL: FHDemoScript.dll

Script DLL attributes

Restart: Script DLL allows restarting failed batch jobs.

Version: 2.0.0

Save Validate Next >

Once the export script is configured, it can be added to a workflow template activity. A new Automation field is available to select the export script to run once the activity is completed. Then data is exported according to the script configuration.

Workflow Activity 1		Approval	1	
Title				<input type="checkbox"/>
Description				<input type="checkbox"/>
Approvers *	<input type="checkbox"/> Include document version owner <input type="checkbox"/> Include workflow initiator			<input type="checkbox"/>
Options	<input type="checkbox"/> 1 of X <input type="checkbox"/> Force reservation <input type="checkbox"/> Allow Check Out <input checked="" type="checkbox"/> Require password <input type="checkbox"/> Allow Postpone Approval <input type="checkbox"/> Convert main documents to PDF			<input type="checkbox"/>
Automation	Export script: Export invoice data			<input type="checkbox"/>
Due By *	1 days and 0 hours after workflow initiation			<input type="checkbox"/>
Task Instructions				<input type="checkbox"/>

15. PDF AND TIFF COMPRESSION

FileHold now supports compression for PDF and TIFF files that have not gone through the server-side OCR process. This is controlled by the license setting "Image/PDF compression".

Compression is supported when:

- The PDF or TIFF file can be compressed without the need for OCR.
- The PDF or TIFF file requires a text layer (OCR) and compression. OCR requires the “OCR Module” to be enabled in the license.

A file can only be compressed or OCR'd once. Documents are not compressed retroactively, meaning any documents residing the system prior to compression being enabled in the license are not compressed.

The original version of the document can be removed by enabling the setting “OcrRemoveOriginalDocuments” in the web config file in Library Manager. If this option is enabled, the pre-OCR/pre-compressed version is soft deleted and a new version is checked in.

The document usage log has two new action types:

- “OCR and compression” for documents that had both OCR and compression.
- “Compress file” for documents that were only compressed (no OCR).
- “OCR document” was changed to “OCR file” for files that have been OCR'd but there is no compression.

The new action types display the amount of compression as a percentage for the file (bytes saved/new version file size). The length of time for compression or OCR and compression processing is also displayed in seconds.

Document Usage Log

☐ Document name contains
☐ Document schema name
☒ Action type
☐ Performed by
☐ Action date

A&H policies
 OCR and compress file
 Accounting (13)
 From 2/22/2021 To 2/22/2021

Apply Filter Export as CSV

Search Results 1-1 of 1

Document name	Document schema	Linked	FileHold	Action type	Performed by	Details	Action date
Bike_IDir	Bicycles	0	201.2	OCR and compress file	System Process (0)	Text layer added and compressed 2235.24% in 60.819 seconds	2/19/2021 11:49 AM

Page size: 30

Document Usage Log

☐ Document name contains
☐ Document schema name
☒ Action type
☐ Performed by
☐ Action date

A&H policies
 Checked Out
 Accounting (13)
 From 2/22/2021 To 2/22/2021

Apply Filter Export as CSV

Search Results 1-6 of 6

Document name	Document schema	Linked	FileHold	Action type	Performed by	Details	Action date
BankStm_123456_BOM_01-Jul-2017	Bike Manuals #2	0	204.2	Compress file	System Process (0)	Compressed 560.72% in 2.365 seconds	2/19/2021 11:49 AM
Bike_IDir	Bicycles	0	203.2	Compress file	System Process (0)	Compressed 798.8% in 0.472 seconds	2/19/2021 11:49 AM
ABC Co Contract	Bike Manuals #2	0	202.2	Compress file	System Process (0)	Compressed 7.79% in 0.001 seconds	2/19/2021 11:49 AM
Agenda_This is a test_Nov-25-2019	F-15 Quotations and Tenders Brochures 0	0	200.2	Compress file	System Process (0)	Compressed 0.17% in 0.012 seconds	2/19/2021 11:49 AM
Lease Glinda Witch Saturday, July 1, 2017 30746 PM A&H policies	0	0	199.2	Compress file	System Process (0)	Compressed 0.25% in 0.001 seconds	2/19/2021 11:49 AM
Invoice # 10529 Gados Cocina Tipica 29-Aug-1997	Bike Manuals #2	0	195.2	Compress file	System Process (0)	Compressed 560.72% in 3.219 seconds	2/19/2021 11:49 AM

Page size: 30

The “OCR queue status” page has been renamed to the “OCR and compression queue”. A new status “Compression functionality status” has been added to the General section. The status can be “Enabled”, “Disabled” or “Not licenced”.

OCR and compression queue status

General

OCR functionality status	Enabled
Compression functionality status	Enabled
Higher priority for newly added or checked in documents	Yes
Number of pending documents	0
Number of error while processing	9

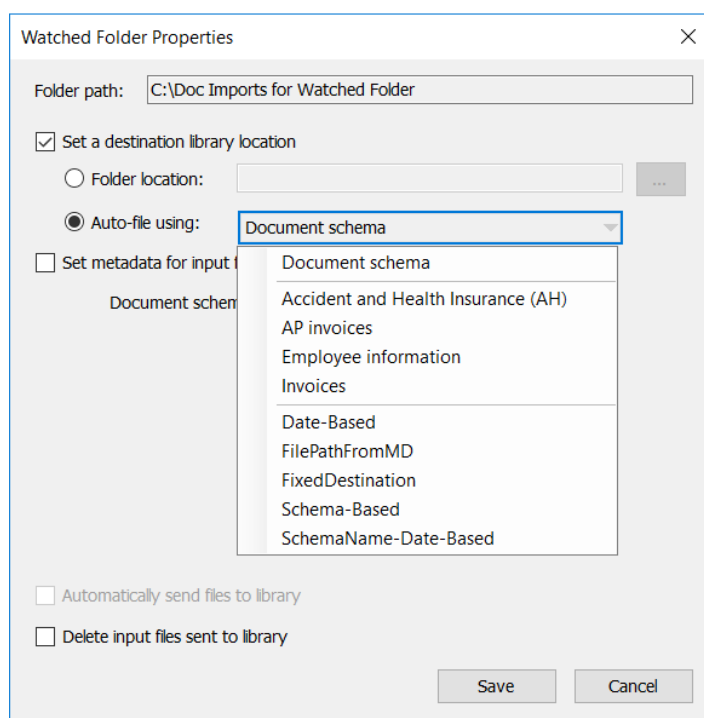
16. EXTRACTION RULES AND AUTO-FILING WITH WATCHED FOLDERS

Extraction rules and auto-filing can now work with the FDA Watched Folders tool. This requires the Automatic Document Importation feature to be enabled in the license.

If the user has a role of library administrator or higher, auto-filing templates, auto-filing scripts, or the auto-filing rules set on the document schema can be used when setting the document location. If the user is a non-administrator, they are restricted to only using the auto-filing rules configured for the document schema.

When setting the metadata, there is a new option to “use only extraction rules”. If used, the schema and metadata are determined according to the extraction rule. If there are any metadata field values set in the watched folder properties, these overwrite the extraction rule values.

If there are missing required metadata fields or the file path cannot be resolved, documents go to the user’s Inbox for processing, as usual.



17. LICENSING ENHANCEMENTS

New licensing options can be seen on the Licensing > Information page:

- Adobe Sign is now controlled by a license option “Digital Signature”. If this option is not enabled, then Adobe Sign is not available for use. The message “The external signature feature is a license option. Contact sales@filehold.com to enable this feature.” appears if configuration is attempted. If a license is applied without the external signature option and Adobe Sign is already configured, a warning message, “Your system has Adobe Sign configured for external signature, but your license does not include the external signature option. Either request a license with the Adobe Sign external signature option enabled or disable external signature before applying the license” appears.

- The FileHold viewer level 3 is now available for users that must be able to redact information in documents. See [FileHold viewer enhancements](#) for more information.
- File compression is now available for PDF and TIFF files that have not gone under the server-side OCR process. The option “Image/PDF compression” must be enabled in the license. See [PDF and TIFF compression](#) for more information.

17.1. License deactivation notifications

The email notification for when FileHold enters the seven-day grace period has been modified. The email body content has been updated for clarity and additional information including instructions about how to resolve the situation. A license deactivation condition is now monitored once a day through the FH email notifications (daily summary) scheduled task. Daily notifications should reduce the risk that an administrator misses the email notification buried in a weekend full of messages or misses it altogether because it was never sent due to a short-term catastrophic host or server failure that caused the deactivation.

As always, administrators can monitor the system administration dashboard to confirm the status of their license at all times.

18. COURIER ENHANCEMENTS

If there is a password requirement when approving a Courier transmission, the password is now entered on the same screen as the comments and attachment document. In previous versions, passwords were entered on another screen.

Users can also drag and drop an attachment document for approval actions.

The screenshot displays the 'Courier' interface for document approval. At the top, the 'Courier' logo is on the left and 'FileHold Courier' is on the right. Below the header is a blue navigation bar containing the user email 'basiepie1@gmail.com', a 'My account' dropdown menu, and a 'Logout' link. The main content area is titled 'Action' with the text 'I approve this document(s)'. It features three input fields: 'Comments', 'Password' (highlighted with a yellow background), and 'Attachment'. The 'Attachment' field includes a 'Browse...' button and a red arrow pointing to the text 'Drop file here to upload'. At the bottom of the form are 'Approve' and 'Cancel' buttons. A footer note states 'Courier, powered by FileHold'.

19. OTHER MISCELLANEOUS ENHANCEMENTS

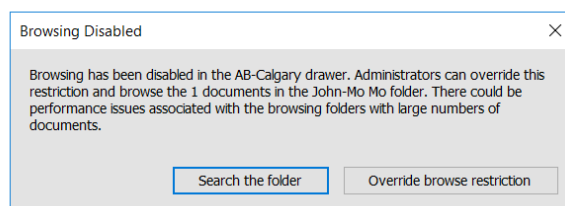
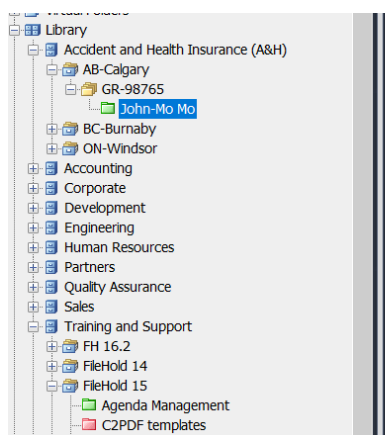
19.1. Block browsing documents in the library

Browsing the contents of folders in specific drawers can be prevented in this release. This can be used in areas of the library where browsing a folder makes no sense, such as when folders

in the drawer are expected to contain millions of documents and browsing is neither practical or performant. This option can be enabled via an API call or by modifying a setting in the database.

If a non-administrator clicks on a folder, the message, "The administrator has disabled browsing in the <name> drawer" displays with an option to search the folder. If the **Search the folder** button is clicked, the advanced search screen displays and executes a search as though it is a saved search on a folder location. If the **Cancel** button is clicked, the user is shown an empty folder.

If an administrator attempts to browse a drawer that is restricted, the message, "Browsing has been disabled in the <name> drawer. Administrators can override this restriction and browse the <number of> documents in the <name> folder. There could be performance issues associated with the browsing folders with large numbers of documents" displays. The administrator has the option of clicking **Search the folder** or **Override browse restriction**. Overriding the restriction displays the documents in the folder.



19.2. Server-side OCR settings

Additional settings are available for server-side OCR engine configuration in the web config file in C:\Program Files\FileHold Systems\Application Server\DocumentRepository:

- **OcrAutoRotate** – Allows to enable/disable rotation of pages according to the prevailing orientation of text presented on each page. Rotation is verified and improved for each page separately.
- **OcrDeskew** – Allows to enable/disable compensation of small rotations to the document that occur during the scanning process.
- **OcrRemoveBlankPages** – Allows to enable/disable removal of detected blank pages in the multipage TIFF images.
- **OcrDehole** – Allows to enable/disable removal of punch holes (visible as large black dots after the scanning process) located on edges of the document pages for TIFF documents.

19.3. Hosted mode

There is a new "hosted" mode option that can be used by resellers of FileHold who host their customers' systems. This helps control some of the system administrator functionality that is not necessary or safe hosted customers. Only the "support users" configured are able to perform certain functions such as:

- Request a system license for a hosted system. No impact to requesting Courier licenses.

- Write access to the document repository screens.
- Start an FTS index rebuild.
- Maintain another support user.

To enable the hosted option, add the following keys to the UserRoleManager web config file under the <AppSettings> section.

- <add key="Hosted.Enabled" value="false"/> – Set this to true for “hosted mode”. The default is false.
- <add key="Hosted.SupportUsers" value=""/> – This is the name of the users that can operate certain advanced system administrator type functions. Enter the login name of one or more users separated by a comma. For example: “dshrute,jhalpert”.

19.4. Email configuration for “From” address

In previous versions, when a user sent an email using the built-in email client, it used the logged in user’s email address as the From address. When this was not compatible with the configured email server, the user would get a message that the email could not be sent.

This version adds the ability to change the From address to the email address configured in the outbound email settings. A new key, “Email.FromGlobalUser” can be configured in the Library Manager web config file. For new installs, the value defaults to true. For upgrades, the default value is false.

While it may be desirable to send email using the true From address, some email server configuration may prevent this. In those cases, it will still be possible to send email but all messages will have a single From address from the main FileHold email settings.

Customers that wish individually addressed email where their email server prevents it can purchase a subscription from FileHold to a special email service. You must have your own internet domain name and be able to maintain your domain name service (DNS) records. This does not replace your normal email service; it works along side it.

This feature has no impact on users with their own email client outside of FileHold.

19.5. FDA performance improvements

The FileHold Desktop Application has been improved for faster login for a standard client session over a WAN network or any network with high latency. The more complex your configuration, the greater the relative improvement.

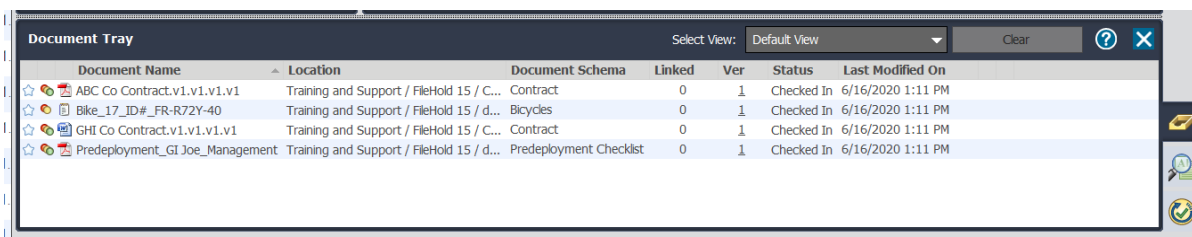
19.6. Re-indexing documents when drive location changes

In previous versions, if the drive location for the repository changed, the full text search index needed to be rebuilt. This sometimes placed a large burden to customers with large indexes.

With the enhanced repository feature released in FileHold 16.2, changing drive locations can be a common operation. In order to support this, a re-indexing the full text search index is no longer required with drive location changes. Users are no longer prompted by the message that changing the storage path will cause a re-indexation of documents.

19.7. Button clean-up

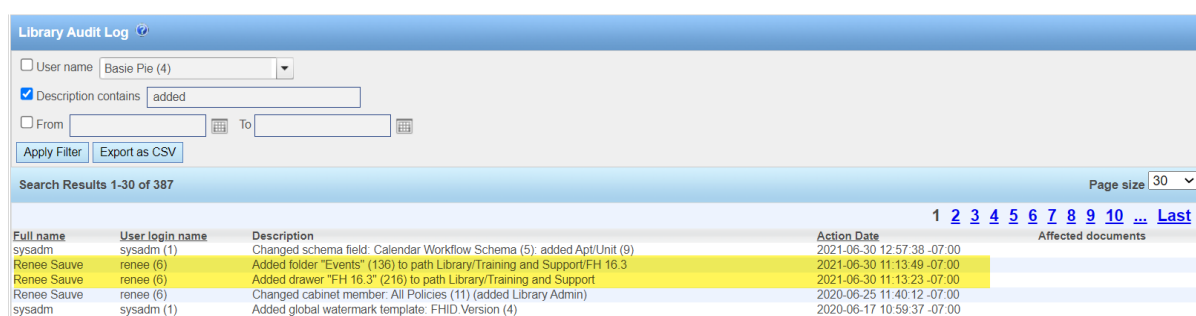
The document tray, the batch jobs report and the viewer have been updated with the new help and close icons. The buttons are also displayed in the same order.



Document Name	Location	Document Schema	Linked	Ver	Status	Last Modified On
ABC Co Contract.v1.v1.v1.v1	Training and Support / FileHold 15 / C...	Contract	0	1	Checked In	6/16/2020 1:11 PM
Bike_17_ID#_FR-R72Y-40	Training and Support / FileHold 15 / d...	Bicycles	0	1	Checked In	6/16/2020 1:11 PM
GHI Co Contract.v1.v1.v1.v1	Training and Support / FileHold 15 / C...	Contract	0	1	Checked In	6/16/2020 1:11 PM
Predeployment_GI Joe_Management	Training and Support / FileHold 15 / d...	Predeployment Checklist	0	1	Checked In	6/16/2020 1:11 PM

19.8. New log entries for the Library audit log

Library objects have always tracked who added them and when, but now the Library audit log also captures this information when new library objects (cabinet, drawer, folder group, or folder) are created for both the Library and Library Archive. The path to the object is shown in the log.



Full name	User login name	Description	Action Date	Affected documents
sysadm	sysadm (1)	Changed schema field: Calendar Workflow Schema (5): added Apt/Unit (9)	2021-06-30 12:57:38 -07:00	
Renee Sauve	renee (6)	Added folder "Events" (136) to path Library/Training and Support/FH 16.3	2021-06-30 11:13:49 -07:00	
Renee Sauve	renee (6)	Added drawer "FH 16.3" (216) to path Library/Training and Support	2021-06-30 11:13:23 -07:00	
Renee Sauve	renee (6)	Changed cabinet member: All Policies (11) (added Library Admin)	2020-06-25 11:40:12 -07:00	
sysadm	sysadm (1)	Added global watermark template: FHID Version (4)	2020-06-17 10:59:37 -07:00	

19.9. Scroll wheel / track pad gesture support to the FDA list controls

Mouse scroll wheels and track pad gestures are now supported in the FDA for metadata field selection in views, schema selection for searches and quick search selection in the search bar.

20. RESOLVED ISSUES

ID	Title
13263	(Workflow) Observer email notifications missing information.
13444	FileHold viewer cannot display embedded documents.
14311	Failed to publish a new version of a checked-out document using the FileHold viewer.
14387	(FDA) Pressing Send All from the inbox while files are being transferred in the background can cause an error message.
14431	(FDA) It may not be possible to see all metadata history when multiple document panels are open at the same time.
14438	(Updater) User may be prompted to reboot the server more than once during a server upgrade even though only one reboot is required.
14439	(Updater) Insufficient disk space during an upgrade may display a strange installer dialog following the insufficient space message.
14466	(FDA) FileHold viewer left panel does not scale correctly when magnification size changes with CTRL + scroll wheel.
14467	Repeated expansion of the font list for an annotation causes the width of the list to decrease.
14483	Assemble incorrectly allows selection of an XML file.
14495	Performance of ADI decreases as the number of documents imported for a single job increases beyond hundreds of thousands.
14520	A one-time workflow activity can be delegated to the user that created the one-time activity.
14522	The user management page may not work correctly over a proxy where a protocol downgrade is configured.
14532	(FDA) Workflow task selection from the calendar does not override a previously set template filter for the My tasks screen.
14539	(FDA) Auto-file button does not work when all metadata field values were filled out by an extraction rule.
14543	Details of an embedded image may be lost during conversion from Word to PDF. This is most visible with very fine standalone lines such as a line graph that use a very narrow width line.
14550	(Web Client) When using a FileHold viewer level 2, user could not rename a new version of the file when publishing.
14554	When importing documents using ADI, future dates are set to the wrong current date/time.
14555	When importing documents using ADI, a drop-down value is reverted to its initial value upon subsequent imports.
14719	(Web Client) When closing the FileHold viewer, user is returned to the History of document versions page instead of the source page.

ID	Title
14843	Database dropdown menu synchronization does not give an error when it truncates field values that exceed 100 characters.
14853	X-Frame-Options HTTP header is set in code to SAMEORIGIN in the WC2 application. This should be left to local implementations.
14856	Email notifications are not sent when TLS1.0 and TLS1.1 are disabled.
14857	Errors when backend services configured for HTTPS and TLS1.0 and TLS1.1 are disabled.
14875	(FHIT) FHIT cannot be used to change database prefix that contains numbers.
14878	Auto-tagging template test fails for metadata number type fields.
14887	The action date column is empty when the document usage log is exported to CSV.
14893	(FOC) The checkbox to delete a local copy of a file is disabled when checking a file into an auto-tagged folder.
14895	User is not redirected correctly after completing a workflow task in the mobile web client.
14899	Quoted full text searches like "X and Y" and "X not Y" will give a syntax error.
14907	Highlight results not highlighting all values when "X and Y" or "X not Y" type of search term added to the full text search raw query.
14913	(FDA) The group separator for a number or currency field cannot be set to "none".
14995	Attachments cannot be added as part of the response to a Courier transmission. Contact support for patch for FileHold 16.2.
14996	(Workflow) If a workflow activity is deleted from a workflow template that includes the workflow initiator and has approval postponed enabled, an error occurs.
15032	(FDA) Unexpected error occurs when editing the Document schema field for multiple documents in a folder or inbox.
15033	Ownership not changed for all objects when the Check all check box is selected using the Change cabinet/folder owner tool.
15057	Error thrown when sorting the Insufficient session report by login date.
15091	(FDA) The auto-filing settings in a schema is turned off if using the option 'Perform lookup of metadata from a database' is enabled in a Managed Import.
15093	(ADI) Could not import documents with indirect metadata when the csv file contains illegal characters.
15140	(FDA) Documents in the library archive are not visible in FileHold 16.2 server using the 16.1 FDA client.
15141	(Workflow) Custom workflow naming pattern does not use the same date format as the metadata field it is based upon.
15158	In the Manage Users list, the filter for Groups does not work.
15164	The links to the Task in workflow notification emails are not working correctly.
15213	(FOC) "Missing value for <metadata field>" message when performing a schema lookup with a custom query.

ID	Title
15215	The Description and Affected Documents columns missing from exported Library audit log.
15255	Server-side OCR could not complete because the system incorrectly determined the document was checked out.
15264	A system administrator can change a domain proxy user's license type from Full to Limited.
15265	(FDA) Managed Import does not retain option 'Delete input files after they have been successfully sent to the FileHold library' if the 'By default delete documents that I Add to FileHold' option in the My User Preferences is disabled.
15267	(FDA) Unexpected error occurs when a non-administrator attempts to change a schema for a document that is associated with a read-only date metadata field.
15309	(FOC) Cannot add or check-in a file that was opened in Microsoft Teams.
15343	The default participant title is missing from the list type of signoff-sheet list type <code>[[sys signoff-sheet list]]</code> merge tag.
15368	Exporting to CSV/Excel from the Manage Users list fails if there are more than 100 users or objects.
15414	(Adobe Sign) An agreement that has been set up to have an approval step after a document is signed does not get advanced in the workflow after it is approved.
15436	(Courier) Document being viewed by a user in the portal times out after a certain amount of time.
15459	Deadlock occurs when adding a database drop down metadata field with a custom query.
15466	(FDA) Cannot delete an email message from Microsoft Outlook that was dragged and dropped into a FileHold folder.
15483	Cabinet owner gets an error when attempting to copy or clone a drawer.
15511	(FDA) After viewing the document review and approval history for a document and clicking Back to Folder, the user is returned to the wrong folder.
15524	(FDA) Error occurs when the check-out option is enabled in a workflow and the user is attempting to return to the My Tasks or folder from the Review and Approval history screen.
15525	(FDA) Modal dialog boxes are lost behind the main FDA window.
15539	(FDA) Error occurs when using the Classic task interface and the user views the review and approval history.
15540	(FDA) Cannot complete workflow when using the Classic task interface.
15543	(FDA) Error messages are not displayed in correct sequence when there are wddb.dat errors.
15558	(FOC) Missing FileHold add-in ribbon upon installing on an Office 365 .msi (64-bit).
15563	(FDA) Manage imports does not work with multi-parameter lookups with missing values.
15592	(FDA) System becomes unresponsive when editing metadata with a drop-down list.

ID	Title
15638	FileHold viewer level 2 is missing from the Viewer configuration settings page when the system is licensed for the Brava viewer.
15649	Files sent via Courier that have not been viewed or downloaded display twice in the folder or search results.
15656	(FDA) File properties are missing in the metadata pane when viewing documents from the Show Documents > document version history pane.
15705	(FHIT) Error thrown when importing a FileHold 15.2 library configuration file with extraction rules into FileHold 16.2.2.
15706	(FDA) The option Send to > Printer is missing from context menu.
15719	Documents in the library archive do not appear in the linked documents pane when the parent document is in the library.
15721	Documents in the soft deletion phase still appear in the My Document Alerts list.
15738	(Workflow) Group member with permissions that is inherited from other groups do not appear as participants when the workflow is initiated.
15750	(FDA) Folder in the library is not highlighted after using "Go to Document Location" from the search results.
15756	(ADI) Error when using the document schema default auto-filing option and the import job is using indirect metadata.
15757	(ADI) Issues with when using an auto-filing template or script other than the schema default.
15779	(FDA) The local copy of a working document is deleted upon adding it to a folder even though the option 'Delete the local copy of this file after it has been successfully added' is not enabled.
15785	(FDA) Document is checked out even after cancelling the prompt to overwrite the local copy.
15786	A metadata field set as 'Required' and 'Read-only' during schema setup is not being properly checked for the global read-only constraint setting.
15806	Tab character in email subject line causes Outlook watched folder to throw an error.
15817	(FDA) Uploading multiple files is slow and causes the FDA to become unusable.
15834	(FDA) Adjusting the screen display settings to 150% or higher cuts off the bottom of the folder list.
15994	(Workflow) Cabinet administrator owners and senior library and system administrators cannot add main or supporting documents to an existing workflow.
16002	(FOC) Error occurs when dragging and dropping an existing email message to an Outlook watched folder with the destination folder renamed/deleted.
16007	(Web Client) When performing an "In the list" quick search with a database drop-down menu, the list of items is not appearing in subsequent quick searches.
16052	(FDA) The ability to export library objects is missing.
16083	(Workflow) Workflow is automatically restarted when a new version is checked in and the option "Reset all activities when adding documents or checking in new document versions to a postponed workflow" is enabled in a workflow template.

ID	Title
16088	(Web Client) Blank screen appears when a user makes a local copy of the document from a folder or search list.
16132	(Web Client, Mobile) The web config setting "TemporaryUploadChunkSize" is ignored when uploading files larger than 2GB.
16140	(ADI) Email notifications are sent when using a "Version" document type despite notifications being disabled.
16158	(ADI) Offline document name with a period (.) truncated upon import.
16171	(FDA) Wrong alert message appears when attempting to reset user's own password which does not satisfy the required logon security settings.
16189	(FDA) User is able to attempt (and fail) to complete a workflow task that is not assigned to them from the Workflow status report.
16223	Auto-filing does not work if the document has an empty multi-select drop down menu.
16226	(FDA, ADI) Extraction rule failed to extract the correct date value with a format of dd/MM/yyyy custom format.
16236	An ampersand (&) is not treated as a space when using a full text search in an advanced search.
16243	(Workflow) Observer receives wrong information in the notification email when a workflow activity is completed.
16244	Unexpected error occurred when attempting to add a folder with a disabled user who is either a member of the 'System Administrators' or 'Senior Library Administrators' group.
16245	(FDA) Watermark is positioned in the wrong place after document assembly.
16267	Error occurs when using a Boolean search.
16288	(FDA) The enabled option 'Prompt me before automatically cleaning up my working documents' in user preferences does not work.
16298	(Workflow) Error occurs when attempting to delegate a workflow initiator for a restarted workflow.
16358	Cannot check in a document that has a drop-down list with more than 1000 items.
16404	(FDA) Local copy of a document is deleted when a document is left open and a user attempts to add to FileHold twice.

21. KNOWN ISSUES

ID	Title
8530	(FDA) Word table not correctly formatted in Brava viewer. Users should use the FileHold viewer level 2.
9128	(FDA) Part of the today's date is not a link in Document Usage Log.
11371	Document assembly may not work with very large files (> 2GB).

13556	(FDA) Viewer state not correctly restored after workstation sleeps or hibernates for an extended period.
14982	Assemble or convert to PDF add wrong characters to finished PDF file when necessary fonts are not installed on the application server. Users should ensure the necessary fonts are installed on the server.
15349	Missing bottom border from the participant responses section of a workflow email notification opened in Outlook or in Word
15504	(FDA) When using the long date format and the "between" operator, the date is cut off.
16133	Email messages (msg and eml) with horizontally long text, table, or graphic is cropped.
16134	Email messages (msg and eml) cannot display special characters in the FileHold viewer.
16153	FTS index must be rebuilt after upgrade in order for Highlight Results to work properly.
16222	User can drag and drop an electronic document to a folder where the user is not a member of the default schema.
16273	Cannot use a number or currency metadata field in custom workflow naming.
16275	Cannot use a drill down metadata field in custom workflow naming.
16290	Wrong user and date information displayed in the metadata pane of a document after changing its ownership.
16296	Overriding both "Send for..." & "Wait for..." External Signature activities results in an insufficient permission exception.
16327	Highlighted file that is open in a level 2 or 3 viewer is lost when selecting another file to view.
16368	(Courier) The Approve button does not automatically appear after viewing or downloading a document without a manual refresh.
16370	Offline document(s) 'switched to version 0' don't retain versioning when copied to another folder or when its folder copied to other location.
16375	The "Files belong to more than one schema" option appears when editing multiple files of the same document schema in the metadata pane.
16382	Copied/cloned library objects are missing names and IDs in the details of the library audit log.
16393	Senior library and library administrators cannot see any newly created cabinets that they own in the library audit log.
16405	(FDA) When merging documents using document assembly, the custom output document name is not used.
16412	(Web Client) User is not notified if a file opened in the viewer is being annotated by another user.
19786	(FDA) Error occurs after assembling an offline file with electronic document during document assembly.
19860	(FDA) Export to Excel doesn't work on Manage users page when manage users page has more than one page.

19867	Updating a FileHold managed drop-down list adds an additional extraneous entry in the Library audit log if user clicks Apply after adding a new drop-down list value.
19868	(Courier) Clicking on a FHID link in the Courier Transmission report does not highlight the transmitted document in the folder list nor open the metadata pane.
19870	(FDA) Performing a quick search related to a number type metadata field throws an error if using the new Quick Search option in the upper top right search bar.
22707	(Web Client) Changing the view to a custom view in the linked documents panel throws an error. Related to issue 22708.
22708	(Web Client) Changing the view to a custom view in the linked documents panel causes the values in the folder view above to disappear. Related to issue 22707.
22712	(FDA) External signatures display as "Review" instead of "External signature" when exporting the workflow status report to CSV or HTML.
22713	(FDA) When editing metadata field values for multiple documents, the modified value does not display properly in the metadata pane or view until the screen is refreshed.
22714	(Workflow) Dashboard displays overdue workflows when the "The overdue column refers to tasks instead of workflows" check box is enabled.
22721	Performing ad hoc searches is possible even if ad hoc searches has been disabled for a group but the group member has user preferences set to have the advanced search or simple search screen as their start-up screen.
22722	FileHold viewer throws a permissions error if the viewer is idle for a period of time (15 minutes or more).
22740	If the screen scaling is set to 150% or 175%, the header bar is misaligned with the viewer tabs.
22742	(FDA) Highlighting of a document in the folder or search results list is lost when moving (click or arrow key) through the list of files with the viewer open.
22747	(FDA) Error thrown when adding a file of 1GB or greater with a drop-down list of 100,000 items or more.
22760	(FOC) User is prompted twice with the 'Check-in document?' prompt when saving and closing a checked-out Visio file.
22761	(FOC) Some settings in the 'Add document options' area of the FileHold Office Client are disabled when auto-filing a document in Office 365 & 2016.
22763	(Viewer) A FileHold level 1 viewer license does not correctly format Word document with Arabic text.