



# FileHold

Document & Record Lifecycle Software

**RELEASE GUIDE**

**VERSION 15.2.1**

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## 1. FILEHOLD 15.2.1 OVERVIEW

This document is a high level description of the new features and enhancements of FileHold 15.2.1.

## 2. SYSTEM REQUIREMENTS FOR FILEHOLD 15.2.1

The minimum hardware requirements to run FileHold Enterprise or FileHold Express in a production environment are listed below.

### 2.1. Application Server Requirements

- Windows 2008 R2 Standard and Enterprise Edition Server (64 bit) with IIS 7.5
- Windows 2012 Standard Edition Server (64 bit) with IIS 8
- Windows 2012 R2 Standard Edition Server (64 bit) with IIS 8.5
- Windows 2012 R2 Data Center Edition with IIS 8 (64 bit)
- Windows 2016 Standard Edition Server (64 bit)
- Windows 2016 Datacenter Edition (64 bit)

### 2.2. Database Server

- SQL Server 2008 (64 bit)
- SQL Server 2008 R2 (64 bit)
- SQL Server 2008 Express (64 bit)
- SQL Server 2012 SP1 (64 bit) Enterprise
- SQL Server 2012 SP1 (64 bit) Express
- SQL Server 2012 SP1 (64 bit) Standard
- SQL Server 2012 SP1 (64 bit) Enterprise Core
- SQL Server 2014 (64 bit) Enterprise
- SQL Server 2014 (64 bit) Express
- SQL Server 2014 (64 bit) Standard
- SQL Server 2014 (64 bit) Enterprise Core
- SQL Server 2016 (64 bit) Enterprise
- SQL Server 2016 (64 bit) Express
- SQL Server 2016 (64 bit) Standard

### 2.3. Web Browser Support

- Internet Explorer 11.x (32 bit and 64 bit)

- Microsoft Edge – current version
- Mozilla Firefox - current version
- Google Chrome - current version
- Safari – current version on Mac

#### 2.4. Active Directory Integration

- Microsoft Office SharePoint Server 2010 (64 bit)
- Microsoft SharePoint Foundation 2010 (64 bit)
- Microsoft Office SharePoint Services 2013 (32 and 64 bit)

#### 2.5. FDA Operating System

- Windows 7 SP1 (32 bit and 64 bit) – Top 3 editions
- Windows 8 and 8.1 (32 bit and 64 bit) – Professional and Enterprise editions. (**NOTE:** On Windows 8 operating systems, the .NET Framework 3.5 needs to be installed for Microsoft Office integration.)
- Windows 10 (32 and 64 bit) Professional and Enterprise editions

#### 2.6. Microsoft Office Support

- Microsoft Office Professional 2007 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio) with SP2 (SP3 recommended)
- Microsoft Office Professional 2010 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)
- Microsoft Office Professional 2013 (32 bit and 64 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)
- Microsoft Office Professional 2016 (32 and 64 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)

#### 2.7. Microsoft SharePoint Support

- Microsoft Office SharePoint Server 2010 (64 bit)
- WSS 4.0/Microsoft SharePoint Foundation 2010 (64 bit)
- Microsoft Office SharePoint Services 2013 (32 and 64 bit)

#### 2.8. Mobile Platforms Support

- iOS – current version
- Android – current version

The mobile client uses HTML 5 with a small screen size so it is expected that many devices will work correctly even if they are not officially supported.

## 2.9. WebCap Support

- Internet Explorer 11.x
- Mozilla Firefox – current version
- Google Chrome – current version

**NOTE:** Only HTTP protocol can be used with WebCap. WebCap does not work with SSL connections.

## 2.10. Print to FileHold

- Windows 7 SP1 (32 bit and 64 bit) – Top 3 editions
- Windows 8 and 8.1 (32 bit and 64 bit) – Professional and Enterprise editions
- Windows 10 (32 and 64 bit) - Professional and Enterprise editions
- Windows Server 2008R2
- Windows Server 2012R2

## 3. NEW FILEHOLD VIEWER

The new FileHold viewer replaces the web viewer available in earlier versions of FileHold. It can display image files (jpg, jpeg, png, bmp, gif, tif, tiff), Microsoft Word (docx), and PDF documents in both the Web Client and FDA. The FileHold viewer has 2 levels, level 1 and level 2.

The viewers now come standard with the new registered user pricing. When creating a registered user they will automatically be assigned a level 1 viewer license if one is available. This can be changed to a level 2 viewer, if purchased. Users will get the use of both the PDF/Image viewer (FDA only) and the FileHold viewer when assigned a viewer license. Customers that upgrade will automatically have their PDF/Image viewer and or web viewer licenses converted to FileHold level 1 viewer licenses.

The FileHold viewer can be used to view documents that exist in the library. It cannot be used to view documents in the FDA Inbox.

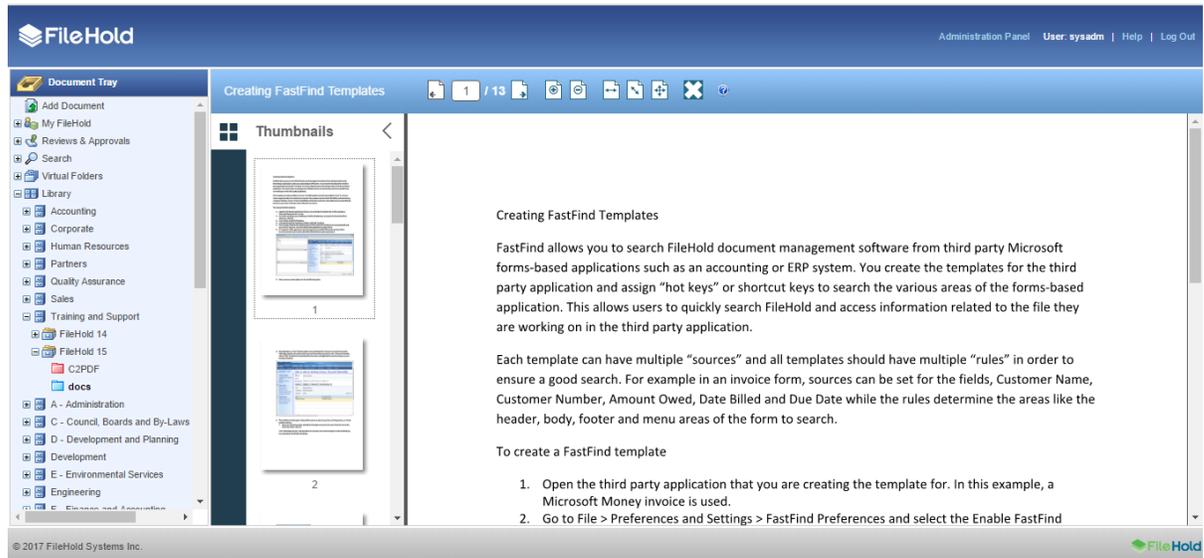
See the table below for features support by the level 1 and level 2 viewers.

Feature	Level 1	Level 2
Open multiple documents	X	X
Publish document to local computer	X	X
Publish document to FileHold	X	X
Print document	X	X
Copy to the clipboard	X	X
Automatically open documents in folders and search results	X	X
Basic annotations and markup		X

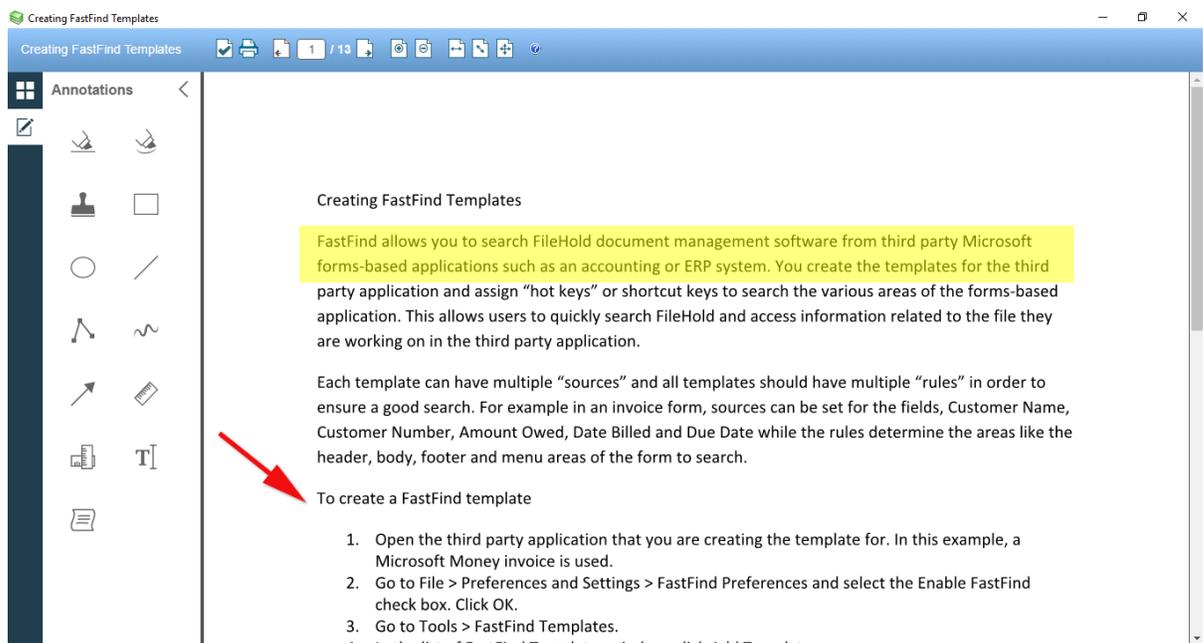
If you would like the annotations feature, then level 2 will need to be purchased. The PDF/Image viewer is still available for use in the FileHold Desktop Application when assigned a

level 1 or level 2 viewer license. Users assigned a Brava viewer license will have access to the level 2 viewer features.

In the level 1 or level 2 viewer you can print, scroll through pages, zoom in and out, go to next or previous page, fit to width, best fit, and full size.



In the level 2 viewer, the annotations feature allows for different markup types such as highlighters, lines, arrows, stamps, polygons, rulers, text, and sticky notes.



With the FileHold viewer, some features of some of the supported file formats are not supported for viewing. For example, if viewing docx type files, generally only plain text is properly rendered. Other items such as tables, images, word art, headers, footers, and footnotes may be partially shown or not shown at all. Only internal document links work in the FileHold Viewer. External links, while showing as hyperlinked, do not work. It is recommended

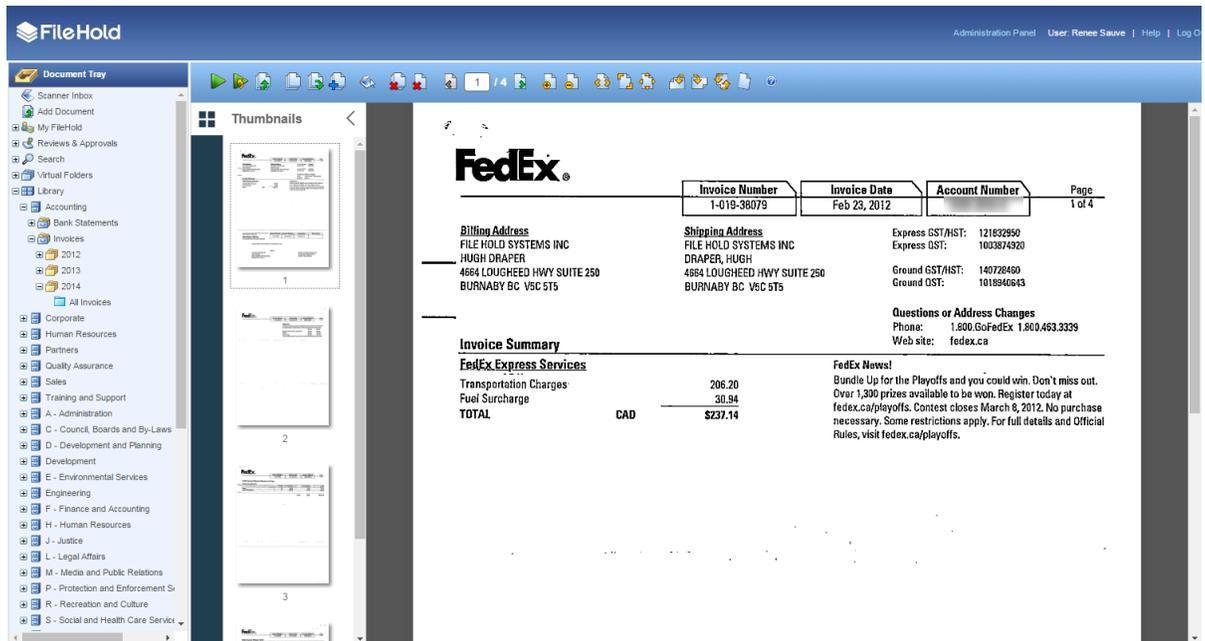
that you test your documents in the viewer in order to determine how your documents are rendered.

## 4. NEW TECHNOLOGY FOR WEBCAP (PREVIEW)

New technology has allowed us to remove the per server charges for our web scanning feature, WebCap.

WebCap is a web-based scanning feature that allows remote users to scan documents via a web browser without the need of scanning software installed except for the TWAIN scanner driver and the browser connector. Remote users can scan and store documents into the FileHold repository from anywhere they have access to the internet and a scanner. Note that WebCap works only with scanners that correctly support the TWAIN driver interface.

WebCap allows pages to be previewed, added, removed, zoomed, de-skewed, rotated, compressed, replaced, and saved to disk. Documents can be stored in FileHold in multi-page TIFF or PDF format.



## 5. WORKFLOW ENHANCEMENTS

A number of workflow enhancements have been made.

### 5.1. Automatically restart an approval postponed workflow

If an approval activity has the option to "Allow Postpone Approval" enabled, the workflow can:

- Return to the workflow initiator. The initiator would need to manually restart or re-initiate the workflow. This was the functionality that was available since FileHold 14.
- Automatically return to a previous activity in the workflow template.

- The user postponing the activity can be given an option of selecting from a list of activities to restart from which includes the returning to the initiator or choose from a list of selected previous workflow activities.

This feature is useful when a later workflow activity discovers missing information or documents and needs to return to a previous activity. Participants are notified if a workflow is restarted and includes the comments of the user who postponed the workflow. If the activity is 1 of X, only the participant who completed the previous task is notified.



## 5.2. Convert a document to PDF during the workflow

Main documents that are going through a workflow process can now:

- Be converted to a PDF document at any step of the workflow
- Append associated workflow or metadata information as a new page to the end of the PDF document. Information can be appended to electronic documents, electronic records, and offline documents. If the document undergoing the workflow is an offline document, then the offline document is converted to an electronic document and the workflow or metadata information becomes the document. The appending of workflow information is optional.
- A new version of the document is created after the conversion into a PDF.

The following document types can be converted to PDF: docx, doc, dot, docm, dotx, dotm, html, rtf, txt, and pdf.

If appending associated workflow or metadata information as a new page to the end of a document, templates using Microsoft Word (docx) will need to be set up. These templates define the type of information to append such as:

- The sign-off sheet from the workflow
- Approval date
- Workflow name
- Workflow template
- FileHold ID number
- Document version
- Version control number
- Document control number
- Workflow initiator's name
- Document owner's name
- Document name

- Any metadata field values

These templates are stored in the FileHold library. The template used can be defined for each activity where there is a PDF conversion step in the workflow. Multiple templates can be configured and used in the system.

### 5.3. Convert a document to an electronic record after the workflow is completed

After a workflow is completed, any main documents can be converted into electronic records automatically. This does not create a new version of the document.

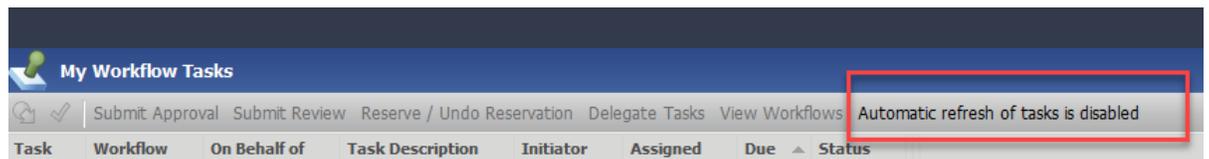
Workflow Name *	review, approve <span>Custom Naming...</span>	Allow Initiator to Define
Description	supply agreement	
Used in Schemas	Supply Agreement, Bicycle Manuals	
	<input checked="" type="checkbox"/> Initiator can modify this workflow (add/edit or delete activities) at initiation.	
	<input type="checkbox"/> Reset all activities when adding documents to a postponed workflow.	
	<input type="checkbox"/> Hide the document version until the workflow is approved	
	<input checked="" type="checkbox"/> Convert main documents to electronic records at completion	
Email notification	<input checked="" type="checkbox"/> Notify <input type="text" value="2"/> days and <input type="text" value="0"/> hours before for tasks that are going to be overdue.	
	<input type="checkbox"/> Repeat notification every <input type="text" value="0"/> hours	
Observers	<input type="text"/> <span>...</span>	
	<input type="checkbox"/> Allow document version owner to observe the workflow	

The permission setting “Enable converting between electronic documents and records” must be enabled by a system administrator in order for this feature to work.

### 5.4. Disabling Automatic Refresh for My Tasks List

The automatic refresh of the My Tasks list can now be disabled in the FileHold Desktop Application. If disabled, the selected task will now remain highlighted until the task is removed or the focus is moved to another task in the list.

If left enabled, the My Tasks list is refreshed every 15 seconds. The task selection and scroll position is restored after the refresh and the previous selected task will be lost. This can cause problems if the user has a large number of tasks assigned to them.



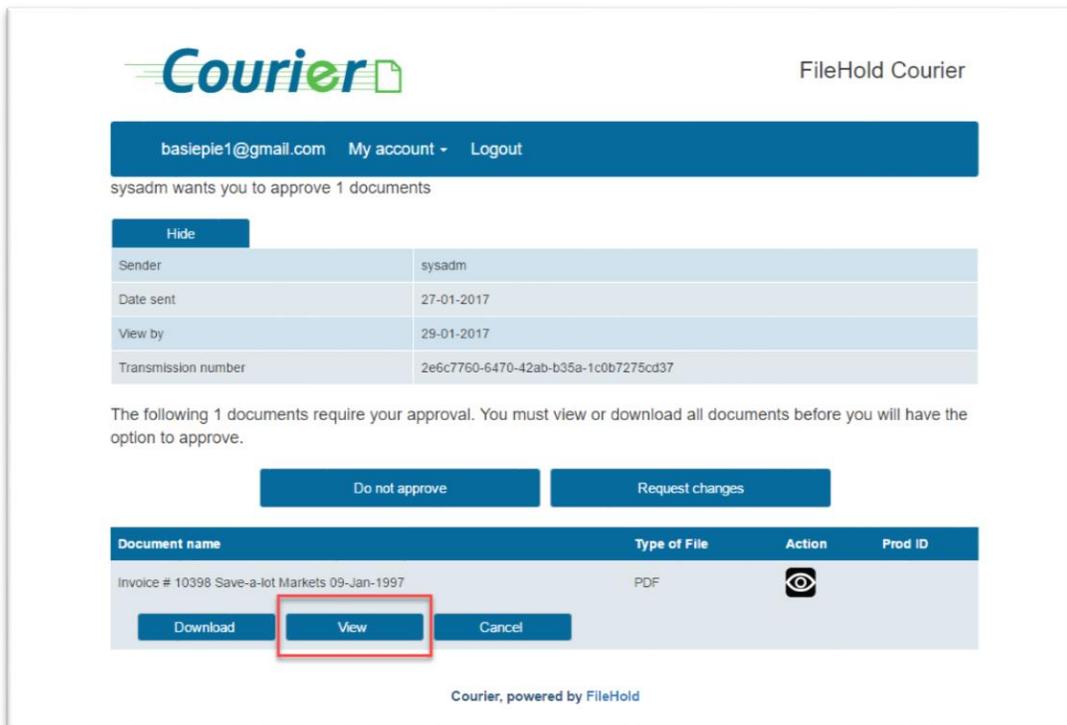
### 5.5. Additional “ad-hoc” workflow template settings

The workflow activity settings have been further separated in terms of the “Allow initiator to define” check box. In previous versions, many of the options were combined into one single area which is not sufficient granularity for some use cases. The participants list and options are

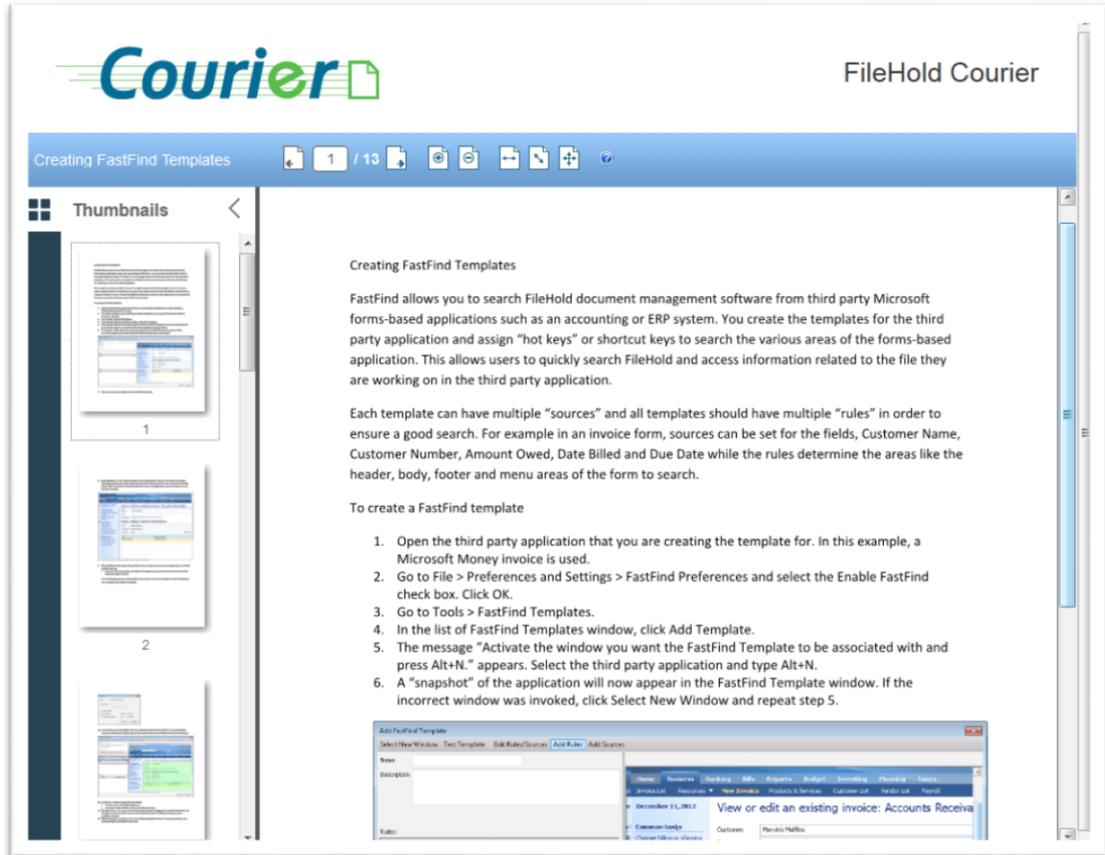
now separated in the template and each have their own “Allow initiator to define” check box option.

## 6. COURIER ENHANCEMENT

Courier can now use the new FileHold viewer to view documents in the Courier portal. There is an option to “view” the document if the format is supported (jpg, jpeg, png, bmp, gif, tif, tiff, docx, and pdf).

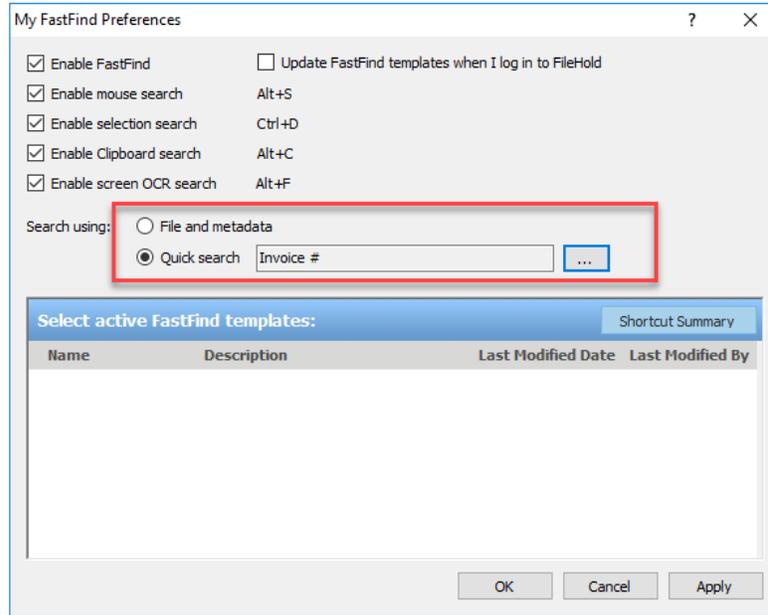


A **View** button will appear for any supported document format. There is no configuration required to make the viewer work with Courier. The viewer will open the document in a separate pane. In the viewer you can scroll through pages, zoom in and out, fit width, fit length or whole page.



## 7. FASTFIND ENHANCEMENT

FastFind searches can now be based on a quick search or a full text search (file and metadata search). If based on a quick search, it will only search on that specific search parameter and nothing else in the system (unlike a full text search which will search everything). Advantages of using up a quick search with FastFind would be to be able to limit the search results. For example, if FastFind was only used to locate an invoice in FileHold from your accounting software, the search results would be limited to what documents would be found using “Invoice Number” quick search.



## 8. SMARTSOFT CAPTURE LICENSING ENHANCEMENT

SmartSoft Capture licenses can now be run concurrently by any number of users. There is no restriction to the number of workstations Capture can be installed on, but the concurrent use of Capture cannot exceed the total number of single copies purchased by the customer. For example, if the customer purchases 5 copies of Capture and installs the software on 20 workstations, 5 users can simultaneously run Capture. If the sixth person attempts to run Capture, they will be told they are not licensed.

A timeout value can also be set for Capture licenses so that users are automatically logged out of Capture after a period of inactivity so an idle session can be freed up for another user.

The number of Capture licenses can be viewed in the licensing and users page.

Licence Details

Registered to	[Redacted]
License issued	1/24/2017, 9:27 AM
License time limit	unlimited
Description	
Concurrent Sessions	100
Available Courier use units	0
Registered Users	100
Guest concurrent sessions	100
Capture concurrent sessions	3
Sharepoint client concurrent sessions	enabled
Workflow module	enabled

## 9. MISCELLANEOUS ENHANCEMENTS

### 9.1. Document URL enhancement

Direct download will automatically download the document without showing the document in the viewer OR show all supported file formats in the viewer (such as PDF file) and download any unsupported viewer file formats (such as Microsoft Word, Excel). There is a setting that can be configured in the web config file in *C:\Program Files\FileHold Systems\Application Server\WebClient* that configures this option. If set to false (default) then supported documents are displayed in the viewer and the remaining unsupported file types are downloaded. If set to true, then all documents are automatically downloaded without viewing.

```
<add key="ViewerFormAlwaysDownloadDefault" value="false" />
```

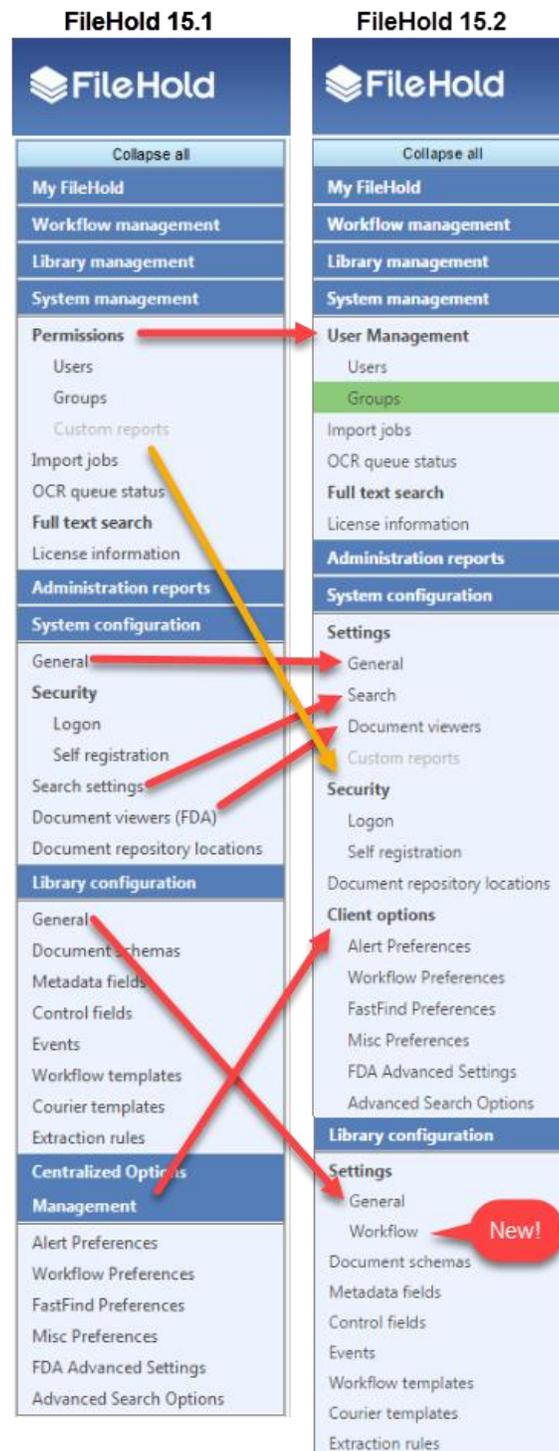
This can also be done on the fly in an HTTP parameter.

### 9.2. Adding middle initials to registered user names

In order to see the full name and middle initial of users in the logs, users page, group members, and metadata pane, a web config file can be modified and a tool run in FHIT. This feature is useful when you have users with same first and last names.

### 9.3. Restructuring of the Administration Panel

The following image shows how some settings have been moved and/or renamed in the web client administration panel.



#### 9.4. Invalid certificate errors in the FDA

If there is a certificate name error in the FDA, the user is now prompted to remedy the issue. A message, “We cannot verify the secure connection to your FileHold server. Contact your FileHold server administrator to correct this situation.”

The system administrator is then provided additional information about the server and the security certificate. The system administrator then has the option to bypass the error one time or always ignore.

An option in FHIT > FDA Configuration can be enabled to never ignore certificate name mismatch errors when creating FDA installation templates.

## 9.5. Group restrictions for Read-only and Guest roles

The download and printing restrictions for read-only or guest role groups have been separated into their own options.

**Guest Users Properties**

Group Name \*

Description

Role \*

Notes

FileHold Group Members  Display all members in one page

Name	Source
Guest User	Local
Web Portal Guest	Local

Restrictions

- Disable emailing documents
- Disable download (open, local copy)
- Disable printing

## 9.6. Full text search

Full text indexing has been improved to be resistant to real time diagnostic and malware utilities locking files when indexing is attempted. The full text search status report, health checker report, and full text search status page has been updated to include information about:

- The number of documents in the FTS queue with failed index attempts in the FTS status screen and FTS status report.
- Number of documents that required more than one attempt to add to index in the health checker and FTS status report.
- Number of documents with unsuccessful attempts to add a document to the index in the health checker report.

There are some options that are configurable for the FTS index in a web configuration file. The web.config file can be found in *C:\Program Files\FileHold Systems\Application Server\FullTextSearch:*

- `Add2IndexEnableVerify` — Checks to see if the doc is in the index. The default value is 1 which is enabled. If set to 0 then it is disabled. It is recommended that you keep this setting enabled. There is a small performance penalty to make this check.
- `Add2IndexMaximumRetries` — The number of times that the document will attempted to be indexed. Default value is 10 minutes
- `Add2IndexDays2RetainFailures` — The length of time that a document will sit in the FTS queue if it has not been successfully indexed. Default value is 750 days.

## 10. RESOLVED ISSUES

ID	Title
8273	Slow response time when clicking the 'Show documents' link in the My Tasks list or Workflow Status report for large (over two million) document libraries.
8276	Changes in the document name and/or version control no. fields of a doc are not shown as values under the 'Metadata field changes' column in the document usage log.
8277	Cannot reinstate as latest version for a doc associated with a version control field in a specific scenario.
8289	Cannot sort the list in the Check-in Files to the Library window by 'Document Name'.
8290	System does not automatically disable a registered user who was disabled from the domain after running the FH AD synchronization task.
8291	(FDA) Freezes after opening My Tasks several times for very long lists of open tasks.
8298	Incorrect permissions stated for a user who is a member of 'System Admin' or 'Senior Lib Admin' in the Effective permission report in a specific scenario.
8301	Incorrect value for a user's group membership found in the Effective permissions report in a specific scenario.
8302	AD group user not added to FileHold group.
8304	Missing entry of deleted users belonging to a domain group in the System audit log.
8315	(FDA) Cannot open document in Brava or PDF/Image viewer when in the Library Archive.
8317	Health Checker takes a long time to run on large libraries.
8328	(FDA) Enabling & performing a mouse search (Alt+S) using FastFind causes error.
8345	Incorrect message in the document usage log after re-adding a domain user previously deleted from FileHold.
8385	Missing Last login date for some user(s) in the List of all FileHold users.
8391	(Courier) Downloading a file with a size of more than 770 MB from the Courier portal throws an exception.
8402	Strange characters appear as the 'Library location' search filter upon setting/viewing an empty saved search.
8407	(FDA) Shared import file(s) cannot be seen by a second user whose user preference was set to a "document import format" different from the first user.
8486	User checkboxes found in the List of all FileHold users were not cleared after adding multiple users to a FileHold group.
8487	Issues with scheduled tasks settings on server and their run time on a Windows Server 2016 upon installation.

ID	Title
8508	UserRoleManager port number not updated by FHIT.
8516	Cannot delete an 'auto-start' workflow template after deleting its associated schema.
8519	Adobe Reader removes and recreates files causing the FDA to lose its tracking information.
8551	No email notification upon completion of a workflow when not approved in a specific case.
8573	(FDA) Watched folders upload empty files in when server is slow to complete a login.
8578	(WebClient) Missing 'pie chart' in the Workflow Dashboard.
8610	Active Directory domain synchronization error.
8622	Date/time format issue in the event viewer and event notifications for certain regions.

## 11. KNOWN ISSUES

ID	Title
5084	FileHold Office Client issue related to a Microsoft Excel Object embedded on a Word document. This is a known Microsoft issue: <a href="http://social.msdn.microsoft.com/Forums/en-US/vsto/thread/0854a0f0-cf7f-4837-9471-82de3fa63177/">http://social.msdn.microsoft.com/Forums/en-US/vsto/thread/0854a0f0-cf7f-4837-9471-82de3fa63177/</a>
6008	When a date format is set to 'yyyy-MM' the date can be entered directly without the hyphen, but the value is ambiguous and may be interpreted incorrectly.
6455	(Mobile Web Client) Strange behavior when taking picture to add as regular documents or review/approval feedback document (iPhone-5 with iOS-7).
6603	(FDA) Sometimes FastFind selection search (CTRL+D) needs to be invoked twice to work.
6901	(Web Viewer) Issue rendering thumbnails when viewing a document with a large number of pages.
7802	SQL timeout occurs when users are checking the "Email notify all folder members..." option upon adding files to a folder when the FH email server is not correctly configured.
7948	(ADI) Inconsistent behavior with matching values in a dropdown metadata field using the indirect metadata import related to leading or trailing spaces in dropdown values.
8221	A small amount of new text cannot be translated in a language pack.
8319	Improve the reliability of FH service account validation with respect to the relevant local server settings or domain policies in the Pre-installation HealthChecker.
8348	"TWIN web connector not found" warning message prompts user upon opening the Scanner Inbox preview in Edge or Chrome.
8361	(Web Client) Pressing Enter when adding a drawer to a cabinet does not save the drawer.

ID	Title
8387	(Server updater) FileHold scheduled tasks were not created after upgrading a FH15.1 to 15.215.2.1 on a Windows Server 2016.
8403	(FOC) "Add file" operation menu items are disabled on MS Outlook 2016 after successfully logging on to the FDA in certain scenario.
8498	Failed to extract value(s) from a metadata field name containing special character(s) when converting a document to a pdf during a workflow.
8515	(FDA) You cannot sort by 'User type' column found in the Administration menu > User management > Users list.
8526	Incomplete hardware key value showing up in the text area when requesting a license file in some FileHold 15.215.2.1 installs on Windows Server 2016. See the <a href="#">Supplemental Installation Guide</a> on how to fix this issue.
8530	(FDA) Word table not correctly formatted in Brava viewer.
8531	(SharePoint WebParts) integrated authentication does not work on SharePoint 2013.
8533	(FHIT) Cannot logon to the AD synchronization tool of a FH server configured only for HTTPS.
8535	(FDA) Inline edit of drop down fields does not work correctly.
8536	(ADI) Loading document details is slow when the list of imported documents is allow to grow very large before clearing.
8540	(FDA) Cannot enable the print function for a user who is a member of the "Read only" FH group.
8543	(FOC) Cannot attach a document from the Library Archive to an Outlook message.
8555	The user sessions log may have orphaned sessions after the system is upgraded or moved while there were active sessions.
8557	URL fields do not appear as links in finished document when converting a document to a PDF during a workflow.
8560	A non-administrative user cannot see the latest version of a document in a workflow they previously initiated when the document was marked as 'approval postponed'.
8576	Several issues found when performing multi-selection of menu items from a drop-down metadata field list.
8577	Mass edit is disabled for documents in a workflow.
8578	Workflow dashboard does not display on Windows server 2016 systems by default.
8586	Cannot search for a file associated with a Currency or a Number metadata field with decimal place in a specific scenario.
8668	(FHIT) Exception thrown when attempting to export library configuration with public saved search(es) configured with 'Contains In DB' as search operator.