FileHold

Document & Record Lifecycle Software

Proprietary Notice

CONTENTS

1. FILEHOLD 16.1.1 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 16.1.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 16.1.1

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

2.1. Application Server Requirements

- Windows 2019 Standard Edition Server (64 bit)
- Windows 2019 Datacenter Edition (64 bit)
- Windows 2016 Standard Edition Server (64 bit)
- Windows 2016 Datacenter Edition (64 bit)
- 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 2008 R2 Standard and Enterprise Edition Server** (64 bit) with IIS 7.5

**Supported for existing customers only.

2.2. Database Server

- SQL Server 2017 (64 bit) Enterprise
- SQL Server 2017 (64 bit) Express
- SQL Server 2017 (64 bit) Standard
- SQL Server 2016 (64 bit) Enterprise
- SQL Server 2016 (64 bit) Express
- SQL Server 2016 (64 bit) Standard
- 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 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 2008 R2 (64 bit)**

Supported for existing customers only.

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

Tested with the Active Directory basic functional set that ships with our supported Windows Server versions. Other versions may also be supported. Contact sales@filehold.com for more information.

Used to synchronize the user authentication system with Microsoft Active Directory and authenticate users against a domain. Users from multiple active directory domains can be synchronized with FileHold with up to one OU per domain.

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 Plus 2019 (32 and 64 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)

- Microsoft Office Professional 2016 (32 and 64 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 2010 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)

- Microsoft Office Professional 2007** (32 bit) (Outlook, Word, Excel, PowerPoint, Visio) with SP2 (SP3 recommended)

Supported for existing customers only.

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 (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

2.10. Print to FileHold

- Windows 10 (32 and 64 bit) - Professional and Enterprise editions

- Windows 8 and 8.1 (32 bit and 64 bit) – Professional and Enterprise editions

- Windows 7 SP1 (32 bit and 64 bit) – Top 3 editions

- Windows Server 2016

- Windows Server 2012R2

- Windows Server 2008R2**

  **Supported for existing customers only.*

3. WORKFLOW ENHANCEMENTS
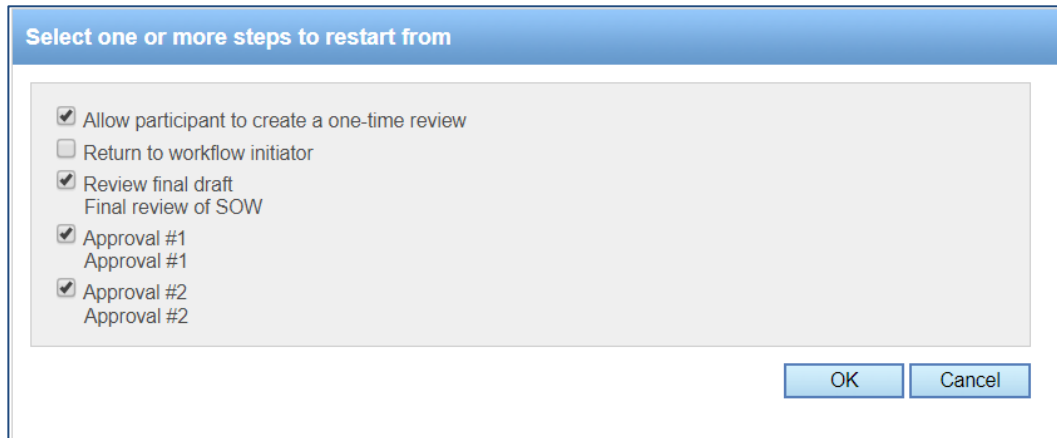
A few improvements have been made in the workflow area.

3.1. My Tasks List Filter

The My Tasks list can now be filtered by workflow template name. This gives users the ability to focus on a particular list of tasks quickly and easily.

3.2.   Postpone Approval Options in the Workflow Template

In the previous version of FileHold, the option to select any of the postpone approval options in the workflow template was limited to either sending to a previous activity or the workflow initiator, <u>OR</u> selecting the ability to add a one-time review activity. Enabling all the options was not possible. In this release, administrators now have the ability to enable all of the "restart from" options in the workflow template.

3.3.   One-time Review Activity

A one-time review activity allows a user to insert a review task ad hoc to allow a workflow participant to request changes before they complete their own task. In FileHold 16.0, the one-time review activity could only be sent to a single user. In FileHold 16.1, the one-time review activity can be sent to a user or a group of users. If a group is selected, then only one participant in the group can complete the activity (1 of X option is enabled automatically).

When a user selects the "postpone approval" option, they are now prompted to select the user to complete the one-time review activity, due date, and any task instructions. By default, the due date for the one-time review activity is set to match the source activity due date. The one-time review activity due date can be extended past the source activity due date if a configuration setting is enabled. The setting AllowWorkflowDueDateExtension must be set to "true" in the web config file in *C:\Program Files\FileHold Systems\Application Server\LibraryManager*. If the configuration setting is enabled, the due date for all workflow activities is extended by the number of days specified in the one-time review activity. For example, if the one-time review activity is due in 10 days, the source and subsequent workflow activities are also pushed out by 10 days, thereby extending the workflow due date.

3.4.   Workflow Email Notifications

The workflow email notifications have been updated to include:

- Comments from participants
- Links to feedback attachments
- Activity title and description

The workflow status is now colour-coded:

- Green: Approved
- Yellow: Postpone approval
- Red: Not approved

Dates are also colour-coded:

- Green: Completed on date was on time.
- Red: Completed on date was overdue.

Links to the workflow status report, mobile client, FileHold Desktop Application, and Web Client are also included in the emails.

The notification subject was updated to include the friendly system name or server name and the count of notifications included in the body. The notification frequency from the subject was removed and added to the body.

3 workflow notifications follow. Your notification frequency preference is Immediately.

Information: Approve Activity Completed

You are receiving this notification as workflow initiator. View all workflow documents in Web or Desktop client.

Workflow	Contracts - SOWs_GHI Co SOW_Nov-19-2018	(Desktop)
Initial document	GHI Co Contract	(Mobile) (Desktop)
Completed on	11/19/2018	
Activity	Approval #1	
Status	Approved	
Participant responses	Basie Pie	This looks good to me.	samplecontract.pdf

Information: Approve Activity Completed

You are receiving this notification as document owner. View all workflow documents in Web or Desktop client.

Workflow	Contracts - SOWs_GHI Co SOW_Nov-19-2018	(Desktop)
Initial document	GHI Co Contract	(Mobile) (Desktop)
Completed on	11/19/2018	
Activity	Final approval	
Status	Approval Postponed	
Participant responses	Marvin Muffins	Need to update section 3 with comments from Deborah.

Action: Review Task Restarted

You are receiving this notification as workflow participant. View task in Web, Mobile, or Desktop client.

Workflow	Contracts - SOWs_GHI Co SOW_Nov-19-2018	(Desktop)
Initial document	GHI Co Contract	(Mobile) (Desktop)
Due by	11/22/2018 9:03 AM	
Task instructions	Review contract and make any necessary final changes.	
On behalf of		
Initiated on	11/19/2018	
Comment	Need to update section 3 with comments from Deborah.	

The notification footer was updated to include the friendly system name or server name and administrative email address. The friendly system name and email address is set in a new Notifications area in the system configuration.

The key name [WorkflowHistory] can be added to the WorkflowNotification.resx file that allows a summary of past task completion information to be included at the bottom of the notifications. This allows workflow participants to easily see previous comments and feedback attachments in their emails. See the Knowledge Base for more information on editing the workflow email notification templates.

Workflow prior task history

Activity	Review final draft		
Status	Reviewed on 11/19/2018		
Participant responses	sysadm sysadm	Made updates to section 1, 4, and 5.	Attachment.docx

Activity	Approval #1		
Status	Approved on 11/19/2018		
Participant responses	Basie Pie	This looks good to me.	

Activity	Approval #2		
Status	Approved on 11/19/2018		
Participant responses	Deborah Dixon	Tentative approval. Section 3 should be updated with the attached info.	info.text

Notification(s) generated by FileHold Systems Inc. Send email to filehold-support@filehold.com for more information.

NOTE: For workflows that started prior to upgrading to FileHold 16.1, the email notifications will be missing some links but this does not affect accessing the workflow information from the email. For workflows started after the upgrade, the links will display correctly in the emails.

4. AUTOMATIC DOCUMENT IMPORTATION

The Automatic Document Importation (ADI) mechanism allows importing a large number of documents into the system. Document versions can now be imported using the indirect metadata method. The versions of the document that need to be associated to each other must be defined in the CSV file in order for the system to connect the versions together. The association can be from a metadata ID, document version ID, document ID, external ID using a quick search, and internal ID.

	A	B	C	D	E	F	G	H	I	J
1	adiImportType	adiImportFilename	adiDocumentName	adiOwner	adiVersionKeyType	adiVersionKey	adiVersionSequence	adiDocumentSchema	Invoice no	Invoice amount
2	Document	\\imports\file1.pdf	My first document	1cc17e42-cd15-45f2-8b9b-bc3c15a7eaef	InternalId	8638d7a0-d9cd-44e1-9596-456759f1269f		Invoice	I445566	1259.75
3	Version	\\imports\file1-v2.pdf	My second document	7596c851-5ab5-49c9-ae00-7352ab6a4c91	IternalId	8638d7a0-d9cd-44e1-9596-456759f1269f	1			
4										
5										

ADI has also been improved for faster data transfer and no file size limits.

5. FILEHOLD VIEWER LEVEL 2 – ANNOTATIONS

Annotations allow users to add stamps, text, sticky notes, shapes, highlights and so on to documents in the FileHold library using the FileHold viewer level 2. Annotations can now be stored as a separate markup layer. Only one markup layer can be created on a document.

If a document has a markup, the "Has Markups" section in the metadata pane is set to "Yes" with a link to view the markup. Clicking the link will open the document with the markup layer visible.
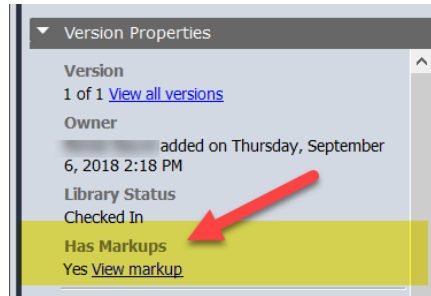
Annotations can still be "burned" into the document (not a separate layer) by saving as a new version or a new document.

Pre-set annotations can now be created and stored for repetitive usage. In the previous versions of FileHold, the annotation properties were lost between documents and could not be stored. Now with annotation pre-sets, these can be created in Microsoft SQL and seen in the Annotation Pre-sets area of the viewer. System and metadata tags (similar to Assemble to PDF and Convert to PDF tags) can be used in the pre-set annotations. Four annotation pre-sets are available "out of the box": Expunged, Paid, Approved, and Rejected. To create custom annotations, such as custom stamps, signatures, and so on, contact the FileHold Professional Services team.

The following is an example of the pre-set "Paid" stamp that has been modified to include the Check # metadata field.

6. MINOR ENHANCEMENTS

Some minor enhancements have been made to FileHold.

6.1. Tags for inserting system information into documents

New system tags are available for use in the following areas: Convert to PDF in a workflow, Assemble documents, and the FileHold viewer level 2 annotations.

- [[sys|now]] — Adds the date and time right now. The format of the date and time can be specified such as [[sys|now|yyyy-MM-dd HH:mm:ss]].

- [[sys|full-name]] — Adds the full name of the current user.

- [[sys|user-internal-id]] — Adds the user's ADAM object ID.

6.2. Optional base URL for Courier

A new configuration option "CourierBaseUrl" has be added to the web config file in *C:\Program Files\FileHold Systems\Application Server\LibraryManager.* This allows the base URL for Courier links to override the global base URL defined in the setting "URLForDownloads", if defined.

Having a separate URL for Courier allows customers with one or more web client applications to have differing links.

6.3. Close icon and Delete button

The **Close** icon ☒ and **Delete** button ☒ have been updated on various screens for consistency.

7. RESOLVED ISSUES

ID	Title
10755	(WebClient) Ability to turn off Schemas at the level of Advanced Search. The setting "DisableSchemasInSearch" option can be set to "true" in the *C:\Program Files\FileHold Systems\Application Server\WebClient* web.config file.
10766	(FDA) Issues found when performing multi-selection of items from a drop-down database lookup metadata field. When manually entering the values with a comma, only the first number in the list was captured.
10768	(FDA) Slow search load in the system with many schemas.
10769	(FOC) Add-in for Excel attempts to modify an ".xla" file. A setting called "FOCIgnoreExtensions" in the FDA.exe.config file contains a list of file extensions that should be ignored by FOC. By default, it contains the "xla" extension. When set to an empty value, XLA files are not ignored. Other extensions, for example "xlam" can be added to this list if necessary.
10772	(FDA) Ability to turn off schemas in advanced search due to slowness if more than 400 schemas exist in the list. The setting "disableSchemasInAdvancedSearch" option can be set to "1" in config file (%appdata%\FileHold\FDA\options.dat).
10774	Search by URL not working using the "Logon with Windows Authentication" link.
10796	"Contains in FTS" search operator does not work when searching on a metadata field.
10805	(Active Directory) Issues with synchronization when multiple domain controllers are available.
11189	(FDA and Web Client) 'Restore system default settings' option in the Settings menu does not work in the Users list.
11192	(FDA) 'Delegate Task' toolbar button is unresponsive upon invoking from the Administration > Workflow management > Status Report.
11224	Issues with Microsoft SQL Server freezing when archiving documents.
11226	(Courier) One-time license file size grows with allocated units which affects system performance.
11228	Workflow template option updated to reset a workflow when a new version of an existing document in the workflow is added or adding a new document.
11229	It was possible to restart a not approved workflow with not approved document versions. This behavior has been changed so that if a user restarts a not approved workflow and any documents were added or removed or a new version of a document was checked in since the workflow was not approved, the user will only be able to restart from the first activity.
11258	(Mobile FileHold) Could not add a document.
11259	(FDA) Search filter for an empty saved search related to Date metadata field defaults to today's date instead of blank.
11261	Cannot permanently delete a document that was imported via Automatic Document Importation (ADI).

ID	Title
11321	(FDA) Wrong value found in the Date metadata field of a document upon dragging and dropping multiple files to a folder.
11323	Insufficient permissions exception thrown when a non-administrator attempts to postpone approval and restart from a previous activity.
11409	(FDA) Failed to search for documents found in the Library archive when starting a search from the archive.
11463	Batch metadata updater does not work for a schema associated with custom-naming.
11465	(Mobile FileHold) Empty or Quick saved search associated with the "Contains in DB" operator throws an exception.
10037	Initiator cannot delegate a task from the delegate participants screen.
12149	Cannot find records in the Library Audit Log if search filter is <User name> AND (<Description contains> OR <Date from>).
12163	Commas in values may cause issues with dropdown menus.
12651	Attachments not added to Outlook message correctly when names and file types exactly match in a certain scenario.
12659	(Workflow) A workflow cannot be restarted if its original template has been deleted.
12720	(FDA) Members list found in group properties was empty after viewing the properties of a domain group.
12721	(FDA) Unexpected error occurred upon clicking on the page 2 link of the Members list found in the domain group properties.
12750	(FDA) Unexpected error occurred when attempting to view a workflow task with the 'Automatic refresh of tasks' option enabled.
12752	(FDA) Checkmark for the 'Delete input files sent to library' option was not retained when attempting to edit the Properties of an existing watched folder.
12789	(P2F) There could be duplicated "Print to FileHold" printers when the FDA is not cleanly shutdown.
12860	Signoff sheet shows signers in wrong order when using the merge tags in a workflow that converts to PDF.
12876	Automatically restarting a workflow should not change the original due dates of the workflow tasks.
12943	(FHIT) Exception thrown when attempting to export library configuration associated with an auto-tagged folder in a specific scenario.
12972	Unexpected error occurred when attempting to link offline documents with custom naming.
12998	Some properties of a library object were not retained after manually archiving.
13050	Performance improvement for specific use cases related to caching user permission information.

8. KNOWN ISSUES

ID	Title
5084	FileHold Office Client issue related to a Microsoft Excel Object embedded on a Word document in Office 2007 and Office 2010. This is a known Microsoft issue: http://social.msdn.microsoft.com/Forums/en-US/vsto/thread/0854a0f0-cf7f-4837-9471-82de3fa63177/
8495	(Workflow) Workflow exists without assigned documents.
8530	(FDA) Word table not correctly formatted in Brava viewer.
10825	Encrypted PDF files may not have their contents added to the full text search index in a specific scenario.
11319	(FHIT) It is not possible to export an arbitrarily large library tree at one time using FHIT. The actual number is limited by system performance and the number of TCP ports configured in the system.
12111	The [[sys|user-id]] tag displays an internal user id instead of the administrator defined user id.
12168	(Courier) Cannot cancel a pending Courier transmission if the one-time license issued from a now locked license pack.
12183	Cannot install on a server with more than 15 characters in its name.
12208	Pre-checker may not be able to detect that a ASP.NET 4.5 component is missing.
12652	ADI cannot match a fully qualified drilldown menu field during an import.
12656	(Web Client) Google Chrome and similar browsers cannot display workflow notification administration screen when certain custom X-Frame-Options HTTP header settings are added to IIS.
12660	Dropdown list appears selected, but value displayed is not the value actually chosen.
12722	Missing group membership for the users who belong to the domain group in the Users list.
12832	(Workflow) Wrong value found in the 'Participant responses' field of the workflow email notification related to an external signature activity.
12866	(Print-to-FileHold) Cannot save watermarks through the 'Print-To-FileHold' printing preferences.
12873	Column headers do not sort properly when using a custom view associated with a multi-select dropdown and drill down menu metadata fields.
12952	(FDA) Email format validation fails for top level domains with five or more characters.
13041	(FOC) Local copy of file is not automatically delete when the client option to delete by default is set to enforced.