



# FileHold

Document & Record Lifecycle Software

**RELEASE GUIDE**

**VERSION 16.2.4**

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For further information about this manual or other FileHold Systems products, contact us at 3010 Boundary Road Office #2H, Burnaby, British Columbia, Canada, V5M 4A1, via email [sales@filehold.com](mailto:sales@filehold.com), our website <http://www.filehold.com>, or call 604-734-5653.

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## 1. FILEHOLD 16.2.4 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 16.2.

## 2. SYSTEM REQUIREMENTS CHANGES FOR FILEHOLD 16.2.4

The minimum hardware requirements to run FileHold Enterprise or FileHold Express in a production environment 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. Application Server Requirements

- Windows 2019 Standard Edition Server is now supported.
- Windows 2008 R2 Standard and Enterprise Edition Server is no longer supported.

### 2.2. Database Server

- SQL Server 2019 Enterprise, Standard, Express is now supported.
- SQL Server 2008 R2 is supported for upgrades only.

### 2.3. Microsoft Office Integration

- Microsoft Office Professional Microsoft Office Professional 2007 is no longer supported.
- Microsoft Office Professional OneNote 2010 is no longer supported.

### 2.4. Microsoft SharePoint Support

- Microsoft Office SharePoint Services 2019 is now supported.
- Microsoft Office SharePoint Services 2016 is now supported.

### 3. DOCUMENT REPOSITORY LOCATIONS ENHANCEMENT

In previous versions of FileHold, the repository could be split into multiple logical locations to improve scalability. In this release, a system administrator can additionally define the preferred location for documents that fit a particular criterion. For example, a cabinet, such as Human Resources, can have its own repository locations. The library archive can also have separate repository locations defined. This makes it possible to store the archive documents according to IT policies and technologies that allow for less expensive storage and backup. The ability to have multiple repository locations is controlled by a licensing option “Enhanced Repository”.

When configuring document repository locations, groups are configured for their document preference: default, archive, or cabinet. Within each group is a repository location which sets the physical storage location. When a file is added to FileHold, the list of preferences is checked to which group it belongs in. If there is no matching group, the file is placed in the default group.

Manage repository groups						
<div> <span>+ Add</span> <span>Edit</span> <span>Delete</span> <span>Move</span> </div>						
Drag a column header and drop it here to group by that column						
	Group status	Group name	Preference	Locations	Available space	Total files
<input type="checkbox"/>	<span style="color: green;">●</span>	Default repository	Default	1	36.87 GB	177
<input type="checkbox"/>	<span style="color: green;">●</span>	Archive	Archive	1	18.9 GB	2
<input checked="" type="checkbox"/>	<span style="color: green;">●</span>	HR	Cabinet	2	45.1 GB	
	Location status	Location name	Path	Allow new files	Available space	Total files
<input type="checkbox"/>	<span style="color: red;">●</span>	Confidential hr docs	G:\HRRR\	No	0 B	
<input type="checkbox"/>	<span style="color: green;">●</span>	More confidential docs	H:\MoreHR\	Yes	45.1 GB	

Files in a particular repository location can be moved to a preferred or default group. Files are moved as a batch and can be viewed in the Batch Jobs report.

Groups and locations can be deleted; however, repository groups can only be deleted if it contains no repository locations. A repository location can only be deleted if it is empty; in other words, there are no files.

For customers with the standard or enhanced repository, the Free space and Warning thresholds can be set and monitored with new gauge controls.

Manage repository location

Definition Actions

Location name: Human Resources

Location path: F:\Secure\HR

☒ Allow new files

99.998 GB

Free space threshold: 10 %

Warning threshold: 15 %

Save settings

## 4. AUTO-FILING TEMPLATES – NEW



Auto-filing is a popular feature for our customers. Auto-filing can take documents from the FDA Inbox, Manage Imports, Automatic document importation, Print to FileHold, the Microsoft Office integration, the Add Document Wizard, and WebCap scanner inbox and file them into the appropriate folders based on predefined values. This feature helps reduce misfiling and enables faster mass importation of documents.

Auto-filing is a long-time feature in FileHold has required skills for editing XML files or dot net programming to configure and auto-filing script. In this release, library administrators or higher roles can apply auto-filing to document schemas by configuring auto-filing templates using a browser-based management interface. The custom or out-of-the-box auto-filing script are still available for use.



Configuring auto-filing templates can be configured in a few minutes for simple rules while still allowing complex expressions using industry standard regular expressions and existing and new FileHold merge tags. The new template configuration interface includes a built-in tester and validation tool to simply getting your template just right.

Manage auto-filing template AP invoices



General **Summary** Library properties Cabinet Drawer Folder Group Folder Test values

 Cabinet definition 



Name like **Accounting** always

 Drawer definition 

Name like **AP Invoices** using **[[sys|document-schema]]**

 Folder group definition 

Name like **2020** using **[[md|Invoice Date|yyyy]]**

 Folder definition 

Name like **ABC Co** using **[[md|Vendor]]**

**Save** < Previous Next >

## 5. DOCUMENT ASSEMBLY – ENHANCEMENTS

The assemble documents feature can be used to automatically construct new documents based on the rules set in the assembly configuration. Some new features have been added to the assemble document feature.

### 5.1. Watermarks on documents

Watermarks can now be added to documents via the Assemble Documents feature. Document assembly requires the FileHold level 2 viewer license.



**Statement of Work**

**FileHold Systems Inc**  
250-4664 Lougheed Hwy  
Burnaby BC V5C5T5

**FileHold**  
Document Management Software

**SOW 12345 for Agreement to Perform Consulting Services to ABC Co**

<b>Date</b>	<b>Services Performed By:</b>	<b>Services Performed For:</b>
July 17, 2017	FileHold Systems Inc 250-4664 Lougheed Hwy Burnaby BC V5C5T5	ABC Co 12345 ABC St. Burnaby BC V4V4V4

This Statement of Work (SOW) is issued pursuant to the Consultant Services Master Agreement between ABC Co ("Client") and FileHold Systems Inc ("Contractor"), effective August 1, 2017 (the "Agreement"). This SOW is subject to the terms and conditions contained in the Agreement between the parties and is made a part thereof. Any term not otherwise defined herein shall have the meaning specified in the Agreement. In the event of any conflict or inconsistency between the terms of this SOW and the terms of this Agreement, the terms of this SOW shall govern and prevail.

This SOW # 12345 (hereinafter called the "SOW"), effective as of August 1, 2017, is entered into by and between Contractor and Client, and is subject to the terms and conditions specified below. The Exhibit(s) to this SOW, if any, shall be deemed to be a part hereof. In the event of any inconsistencies between the terms of the body of this SOW and the terms of the Exhibit(s) hereto, the terms of the body of this SOW shall prevail.

**Period of Performance**

The Services shall commence on August 14, 2017, and shall continue through August 31, 2017.

If the optional workflow module is enabled in the FileHold license, watermark templates can be created by a library administrator or higher role. These templates can be applied during document assembly. Up to three templates can be applied per assembly job.

Manage global watermark templates				
Drag a column header and drop it here to group by that column				
	Name	Description	Active	Position
<input type="checkbox"/>	client-external-address		<input checked="" type="checkbox"/>	Center
<input type="checkbox"/>	client-hostname		<input checked="" type="checkbox"/>	Center
<input type="checkbox"/>	client-internal-address		<input checked="" type="checkbox"/>	Top
<input type="checkbox"/>	Do not print	Use for documents that should not be hard-copy printed.	<input checked="" type="checkbox"/>	Center
<input type="checkbox"/>	page of pages		<input checked="" type="checkbox"/>	Bottom
<input type="checkbox"/>	server-external-address		<input checked="" type="checkbox"/>	Bottom

Custom ad-hoc watermark templates can also be created on demand in the assemble document feature. Only one custom watermark template can be applied during document assembly. Custom watermarks can be combined with watermark templates for a total of three watermarks per document.

Assemble document(s)

Input Output Assembly options **Watermarks** PDF options Actions Summary

Top

Center Do not print

Bottom page of pages

Custom watermark

Cancel < Previous Next > Assemble

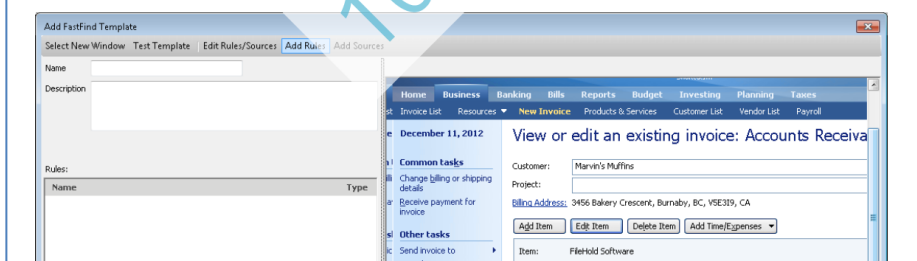
## 5.2. Watermark merge tag fields

Merge tags can be used with watermarks to insert information into the assembled PDF document. Information such as metadata field values, system information, and workflow data can be inserted as a watermark into the newly generated document.

Watermark tags can be added to watermark templates and custom watermarks.

For example, the watermark tag `[[sys[filehold-id]]].[sys[document-version]]` produces the following watermark:

1. Open the third party application that you are creating the template for. In this example, a Microsoft Money invoice is used.
2. Go to File > Preferences and Settings > FastFind Preferences and select the Enable FastFind check box. Click OK.
3. Go to Tools > FastFind Templates.
4. In the list of FastFind Templates window, click Add Template.
5. The message "Activate the window you want the FastFind Template to be associated with and press Alt+N." appears. Select the third party application and type Alt+N.
6. A "snapshot" of the application will now appear in the FastFind Template window. If the incorrect window was invoked, click Select New Window and repeat step 5.



## 5.3. Building documents with merge tag fields

Documents can be "built" based on new merge tags, such as an agenda. These new merge tags are available for both document assembly and converting to a PDF in a workflow.

- **Link** inserts a link to another document in FileHold. It displays as a hyperlink in the assembled document.
- **Embed** embeds a FileHold document into the source document. The embedded document can be password protected to protect sensitive or confidential information. The embed option displays as a paperclip icon in the assembled document.
- **Expand** expands the contents of a FileHold document in the source document. The formatting of the assembled document can be taken from the source document, replaced by the expanded document, or merged. The expanded document must be one of the supported file types: .doc, .docx, .dot, .docm, .dotx, .dotm, .html, .rtf, .txt. Merge tags can also be placed within the expanded document.

For example, the following merge tags are placed in a Microsoft Word document:

1. `[[link|2|Link(Default WebClient),Text(This is a linked document)|Document not available]]`
2. `[[embed|11,This is an embedded document and protected with a password|Document not available]]`
3. `[[expand|167|Format(Replace)|Document not available]]`

After document assembly, the resulting document looks like this:

## Agenda


Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas ac dui eget lacus lacinia convallis. Curabitur elementum eget sem vel consectetur. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Fusce non volutpat ipsum, eu rhoncus justo. Duis dignissim in risus tristique tempus. Quisque tincidunt elit eleifend auctor luctus. Maecenas non libero dapibus sem feugiat tristique. Praesent tempus neque sit amet tellus consectetur pretium. Proin sit amet massa faucibus, condimentum lectus sit amet, lacinia dolor. Cras nisi neque, condimentum vitae placerat eu, fringilla nec lorem. Nunc ultrices egestas mauris, id finibus nunc finibus sit amet.

Cras id lectus sapien. Cras et sollicitudin lacus, dapibus elementum nunc. Suspendisse semper augue eget tincidunt interdum. Maecenas in eros dolor. Nullam commodo, metus vitae placerat vehicula, dolor quam convallis velit, at hendrerit ante metus id dui. Nullam commodo velit vitae sem maximus iaculis. Cras at odio ultrices, commodo massa nec, tincidunt leo. Aenean malesuada libero eros, a efficitur nibh maximus et. Vivamus et fringilla diam. Maecenas in pretium metus, vitae fermentum velit. Praesent quis urna id est fringilla vulputate eget quis ligula. Donec non nibh a quam ultrices blandit sed quis lectus.

[This is a linked document](#)

1

Linked document

To access this document, enter the password: 

2

Embedded with password protection

The following text is using the “expand” merge tag

<beginning of expanded text>

3

Expanded text from another document

Documents can be “built” based on new merge tags, such as an agenda. These new merge tags are available for both document assembly and converting to a PDF in a workflow.

- Link inserts a link to another document in FileHold. It displays as a hyperlink in the assembled document.
- Embed embeds a FileHold document into the source document. The embedded document can be password protected to protect sensitive or confidential information. The embed option displays as a paperclip icon in the assembled document.
- Expand expands the contents of a FileHold document in the source document. The formatting of the assembled document can be taken from the source document, replaced by the expanded document, or merged. The expanded document must be one of the supported file types: .doc, .docx, .dot, .docm, .dotx, .dotm, .html, .rtf, .txt. Merge tags can also be placed within the expanded document.

<end of expanded text>

## 6. FILEHOLD VIEWERS ENHANCEMENT

New file formats are now supported by the FileHold viewer level 2:

- XLSX, ODT, CUR, WSQ, and DXF files.

Not every feature of the supported file formats is supported for viewing. It is recommended that you test your documents in the viewer in order to determine how your documents are rendered.

## 7. DATE AND TIME ENHANCEMENT

In previous versions, all times entered or viewed in the system were in the context of the time zone of the SQL server. In this release, each user can control their time zone. If a user in Berlin adds a document at 4 pm, a user in New York will see it has been added at 11 am.

In previous versions, most dates were formatted in the US regional style. The only exception was for metadata fields where administrators had full control. Now, users and administrators can set the date and time formatting for how the dates and times they see in the system. The short date, long date, short date and time, and long date and time formats can be configured globally for users by an administrator, individually on each user account, or end users can configure in their User preferences. The short date format for May 4, 2020 in Berlin can now be 04/05/2020. The New York office could be 5/4/2020 and the factory in Beijing might see the same date as 2020-05-04.

**Environment Settings**

Time Zone	(UTC-08:00) Pacific Time (US & Canada) ▼
Short date format	Default ▼
Long date format	M/d/yyyy
Short time format	dd/MM/yyyy
Long time format	yyyy-MM-dd

The date display format for a date-type metadata field can be set in the field properties. For customers who have upgraded from a previous version, these dates will be set to a “custom date” format with the previous version’s date format entered.

**Edit Application Date Field**

Name *	Application Date	
Description		
Field Type *	Date ▼	
<b>Field Properties</b>		
Date Display Format	Custom format ▼	
Custom Format	MM/dd/yyyy	Test
Test Result		
Initial Value	current date: time ▼	
<div>Save</div> <div>Cancel</div>		

Other items to note about the date/time enhancement:

- Times in the database are now stored in Coordinated Universal Time (UTC). Custom reports and software may need to be updated to accommodate this change.
- Email notifications are displayed in the date format of the person being notified.
- For Courier transmissions, internal users see their configured time zone and external users see the system default time zone.
- Automatic document importation jobs use the system default time zone.
- File properties extraction rules can have date and time extracted according to the local time (behaviour of previous versions) or using UTC time.
- Microsoft Outlook Watched folders, managed imports and watched folders always use local time.

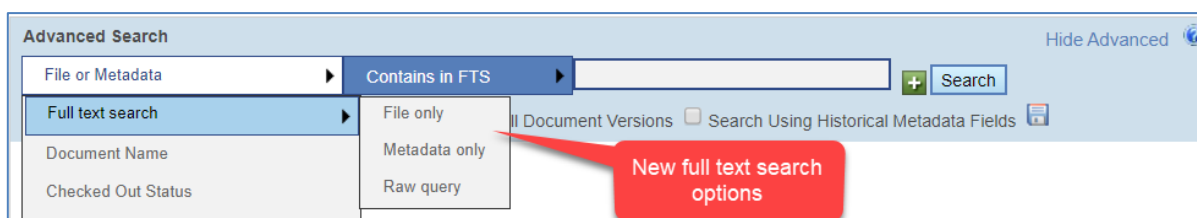
Upon upgrading to FileHold 16.2, the installer prompts the user to prepare for the time conversion from local to UTC. The existing SQL Server UTC time offset and how to handle daylight savings time needs to be set prior to completing the upgrade.

## 8. ADVANCED SEARCH ENHANCEMENT

New full text search criteria have been added to the Advanced Search screen:

- File or metadata – Searches both file contents and metadata for matching search terms. This search option remains unchanged from previous versions and is the default.
- File only – Searches file contents only for matching search terms.
- Metadata only – Searches metadata only for matching search terms. This option replaces the “Search metadata only” check box available in previous versions.
- Raw query – A direct search in the dtSearch engine with no adjustments made by FileHold. Raw dtSearch search terms are required for this option. This option is available only to system administrators by default.

By default, a natural language query or “Google-like” search is used with the full text search options above.

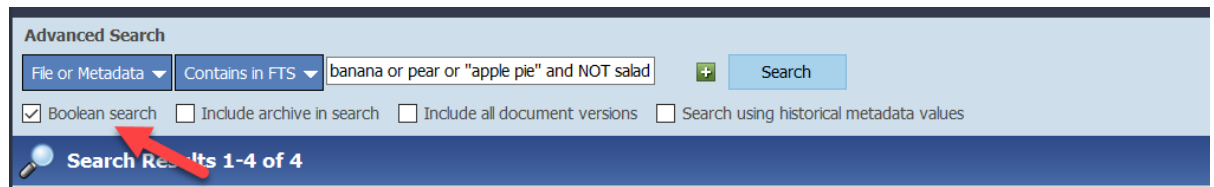


In order to conduct Boolean-type searches, a new advanced search option “Boolean search” check box is available. For example:

```
(banana OR pear OR "apple pie") AND NOT (salad OR "ice cream")
```

finds documents with any of banana, pear or apple pie that do not have salad or ice cream.

The “OR” and “AND NOT” are not case sensitive.



Advanced Search

File or Metadata Contains in FTS banana or pear or "apple pie" and NOT salad

☒ Boolean search ☐ Include archive in search ☐ Include all document versions ☐ Search using historical metadata values

Search Results 1-4 of 4

## 9. WORKFLOW ENHANCEMENTS

Several workflow enhancements have been made for this release.

### 9.1. New interface screen for completing tasks

When completing task such as reviewing or approving documents or sending documents for external signature, a new interface can be used for a more clean and friendly experience that provides more workflow details to the user. For example, task details, activity title, and previous workflow activities, comments, and actions can be seen on the same screen. Alternatively, the old interface can still be used.

The new interface is available in the FileHold Desktop Application, Web Client, and Mobile client.

**Submit approval**

Contracts - SOWs\_GHI Co SOW\_Oct-21-2019

**Task instructions for Step 4: Final approval**

Approve 1 document(s) with 0 supporting document(s).

Please approve final contract details.

**Complete approval submission**

Add a comment to your approval

Add a file attachment to your approval

No file chosen

In order to submit your approval, rejection or postpone approval of all documents in this workflow, you must enter your FileHold password.

**Task details**

Due date: 10/22/2019 1:38 PM  
Check out: Not allowed  
Password: Required

**Workflow history** [Changes](#)

**Step 3: Approval #2 - Deborah Dixon - 1m**  
I saw no issues

**Step 2: Approval #1 - Basie Fie - 0m**  
The changes look ok to me.

**Step 1: Review final draft - sysadm - 0m**  
I made a few changes to section 2.1. See document.

Added initial document - GHI Co Contract - sysadm (1)

The user may be able to choose the interface type, depending on how the administrator has configured the workflow settings.

**Workflow settings**

**Workflow permissions**

The following setting determines if one workflow or multiple workflows are initiated when multiple documents are selected.

The following setting determines what user interface will be available for completing tasks.

nership when initiating workflows or sending Courier transmissions

etadata when a workflow or Courier approval transmission is active

## 9.2. New modifiers for the signoff-sheet merge tag

The PDF converter or Assemble document settings allow you to set up merge templates that can convert documents to a PDF and append information such as the workflow signoff sheet. A merge template uses “tags” in order to insert FileHold workflow information into the document.



The `[[sys|signoff-sheet]]` merge tag adds workflow sign off sheet information to the end of the document when converted or assembled. The following have been added for horizontal or vertical table options:

- A new modifier “IncludeReviewers” has been added to include review participants.
- A new modifier “Column” that can work with all fields for the table signoff sheet formats. The modifier allows the user to specify whether a specific field should be included in the sign off sheet by specifying a true or false value. True causes the field to be included and false causes the field to be suppressed. Several fields are set true by default including participant, date, on-behalf-of, document name and workflow name. The fields appear in the table in the order they are specified in the tag.
- A new “ClearFields” modifier makes all fields false (do not appear).
- A new “DateFormat” modifier allows a user to specify the date format for any date/time field in the signoff sheet. The format must follow standard dot net formatting code.
- Existing columns include participant, date, on-behalf-of, document-name and workflow-name. This specification adds two new columns to the table: participant-type and comment. Participant type is “Reviewer” or “Approver”. Note that authors are never included.
- The heading for the participant column changed from “Signer name” to “Participant name” and the date column heading changed from “Approval date” to “Date”.

For example:

```
[[sys|signoff-sheet|horizontal,IncludeReviewers,Column(document-name,false),Column(workflow-name,false),Column(participant-type),Column(comment)]]
```

Will give the following output:

<i>Participant name</i>	<i>Date</i>	<i>On behalf of</i>	<i>Participant type</i>	<i>Comment</i>
<i>April Ludgate</i>	<i>7/22/2019</i>		<i>Reviewer</i>	<i>No comment.</i>
<i>Leslie Knope</i>	<i>7/23/2019</i>		<i>Approver</i>	<i>I took your idea and made it better.</i>
<i>Ron Swanson</i>	<i>7/24/2019</i>		<i>Approver</i>	<i>The less I know about this, the better.</i>

For example:

```
[[sys|signoff-sheet|horizontal,ClearFields|This value is always inserted]]
```

Will give the following output:

*This value is always inserted*

### 9.3. New merge tags for convert to PDF

New merge tags are available for both document assembly and convert to PDF. The merge tags are:

- Link
- Expand
- Embed

See [Building documents with merge tag fields](#) for more information.

## 10. MINOR ENHANCEMENTS

Some minor enhancements have been made to FileHold.

### 10.1. Performance improvements

- If using “Get a local copy” with a large page size (>1000) in the FDA, the documents are now downloaded significantly faster.
- The length of time database tables are locked when downloading as zip has been significantly reduced.
- For developers, a new method has been added to the document finder service called `GetDocumentsWithField` that can be used in place of `GetDocumentsBySnapshot` except this new method allows you to specify the metadata fields to return instead of relying on the view. This can help avoid repeated calls to `GetDocumentDetails` by allowing the developer to specify the fields to be returned.
- Another improvement for developers allows more than one document version at a time to be specified for download without using download as zip. A single call to `DocumentManager.PrepareMultipleDocumentsToDownload` will return a list of tokens ready for download.
- FDA inbox and manage imports processing is much faster when documents have extraordinarily long dropdown menus.
- FDA login speed improved especially over WAN connections and with large numbers of document schemas.
- Adding documents that include metadata fields with very long dropdown menus is now faster.
- The FileHold Office Client (FOC) loads faster when there are many schemas in the system (400+).

### 10.2. Deleting Working Documents

Working documents are documents that have been checked out or downloaded in the FDA. The deletion of working documents has been enhanced so that documents can be:

- Automatically deleted without user intervention (new).
- Prompted prior to deletion and given the option to cancel the deletion (present in previous versions of FileHold).

These options can be controlled by an end user in the User preferences or by a system administrator in the Client Options > FDA advanced settings.

The working documents folder may be cleaned automatically or the user may be prompted under certain conditions. This is controlled by the system administrator in the Client Options > FDA advanced settings.

- When the FDA is minimized to the system tray.
- When the user logs out.
- When the FDA detects it has been disconnected from the FileHold server.
- When the FDA receives a message from Windows to shut down.

Local files that are in use by another process are not deleted and remain in the working documents and will be processed the next time there is a trigger condition. Local files associated with electronic documents that are modified will not be deleted. These files should be managed using manual check in or the working documents synchronization tool. Once the documents have been checked in / synchronized they will be subject to the automatic deletion rules.

Client Options		
FDA Advanced Settings		
Enforce Option name	Values	Reset default value for all users
<input type="checkbox"/> Show Welcome Screen at startup	Enabled	Reset
<input type="checkbox"/> Default screen at startup	Blank	Reset
<input type="checkbox"/> Maximum simultaneous transfers (1-5)	1	Reset
<input type="checkbox"/> By default delete documents that a user Adds to FileHold	Disabled	Reset
<input type="checkbox"/> By default delete documents that a user Checks In to FileHold	Disabled	Reset
<input type="checkbox"/> Prompt for Download Location when a user Makes Copies of Files	Enabled	Reset
<input type="checkbox"/> Prompt for Download Location when a user Checks Out Files	Enabled	Reset
<input type="checkbox"/> Prompt user to remove files when sending them from the Inbox	Enabled	Reset
<input type="checkbox"/> Automatically clean up user's working documents	Enabled	Reset
<input type="checkbox"/> Prompt before automatically cleaning up user's working documents	Disabled	Reset

Clean up working documents extended conditions:

- ☐ When the FDA is minimized to the system tray.
- ☐ When the user logs out.
- ☐ When the FDA detects it has been disconnected from FileHold server.
- ☐ When the FDA receives a message from Windows to shutdown.

### 10.3. Disabling the PDF/Image Viewer

By default, the PDF/Image viewer will be disabled upon install or upgrade. The PDF/Image viewer is being deprecated with this version so it is recommended that users transition to the FileHold viewer.

Users can re-enable the PDF/Image viewer in their User Preferences > Viewer tab or a system administration can re-enable in the Client options > FDA advanced settings.

My User Preferences

General Advanced **Viewer** Contact Information Company Information

**Document Viewer Settings**

**PDF/Image viewer only**

☐ Enable the old FDA PDF/Image viewer. This viewer is end-of-life. Transition to the FileHold viewer as soon as possible.

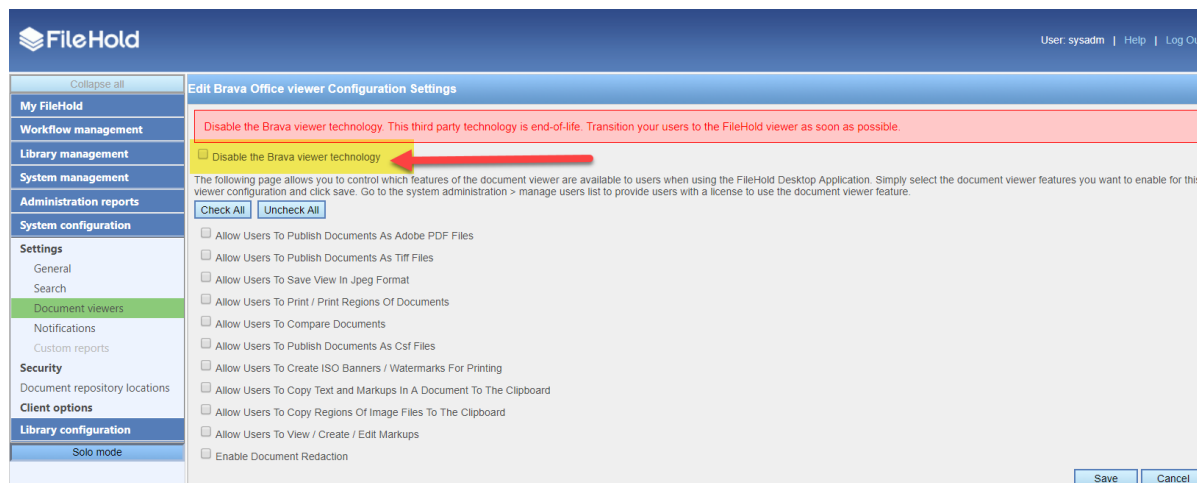
Orientation of the thumbnail view Bottom

**PDF/Image viewer and Brava viewer**

## 10.4. Disabling the Brava Viewer

System administrators can now disable the Brava viewer so it will no longer be able to open nor redact a document. The Brava viewer has been deprecated since 2017 so it is recommended that users transition to the FileHold level 2 viewer instead.

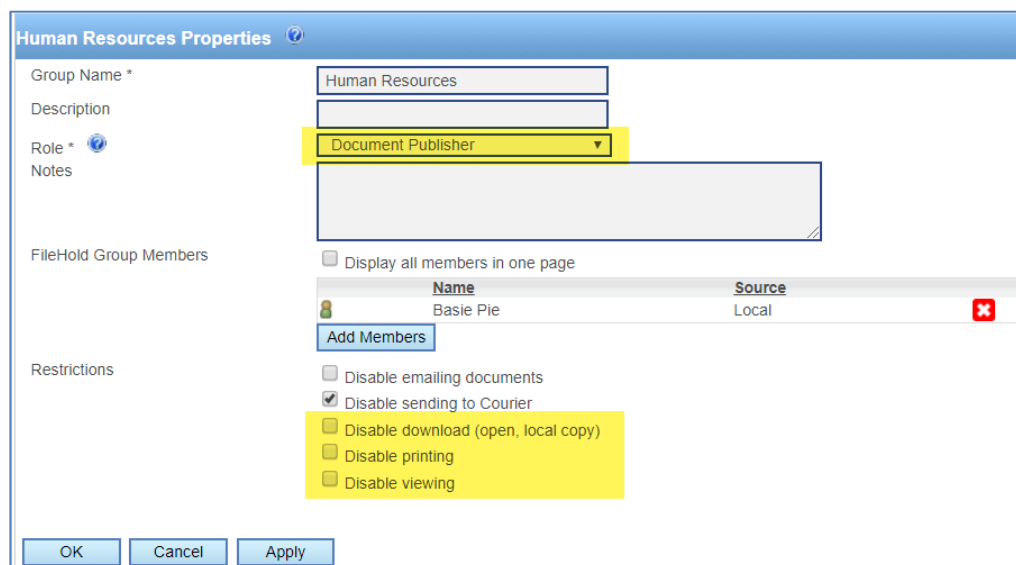
The Brava viewer can be disabled in the Document viewer settings.



## 10.5. Disabling downloading and viewing for groups

A new group restriction has been added to the group properties: Disable viewing. If enabled, this restricts users from viewing document in the FileHold viewer. This option is available for groups with a role of document publisher or lower.

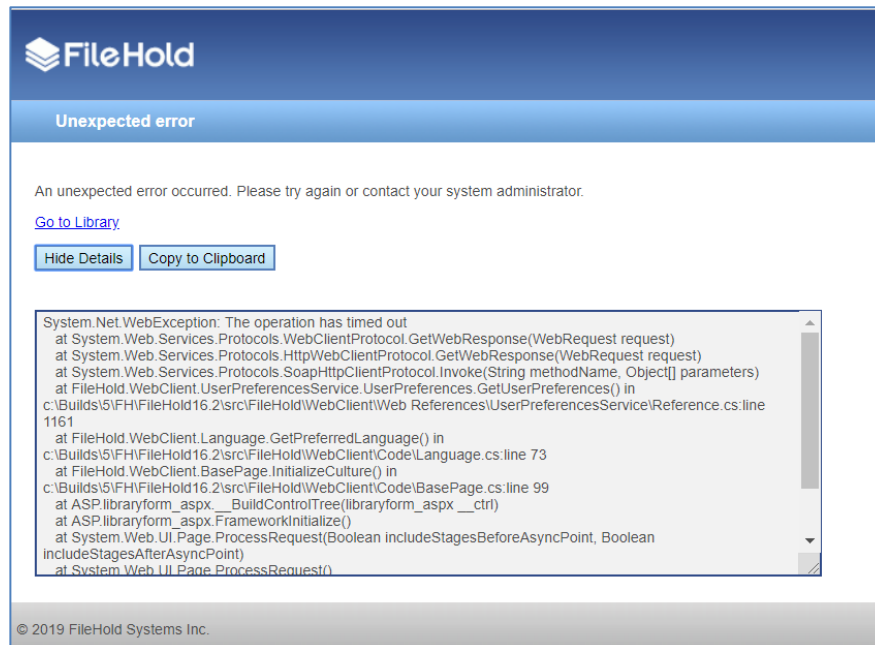
For the disable download and disable printing options, these are now included for groups with a role of document publisher. In previous versions, only read-only or limited roles had these options available.



## 10.6. Extended error messages

An extended error message is now displayed if an “unexpected error” occurs. In previous versions, administrators needed to access the event log on the server to view the error. The “unexpected error” message now includes **Details** and **Copy to Clipboard** buttons. This message can be used to assist a user or administrator in solving the issue.

Extended messages appear in the FDA, web client, mobile, and Courier clients.



## 10.7. Logging changes to drop-down metadata fields

If changes are made to any type of drop-down metadata field, it will now be recorded in the Library audit log. This includes the type of change: Added, Deleted, or Changed. The following columns have been added to the log: New lookup by, New retrieve from, Action, Old lookup by, Old retrieve from, and (number of) Affected documents.

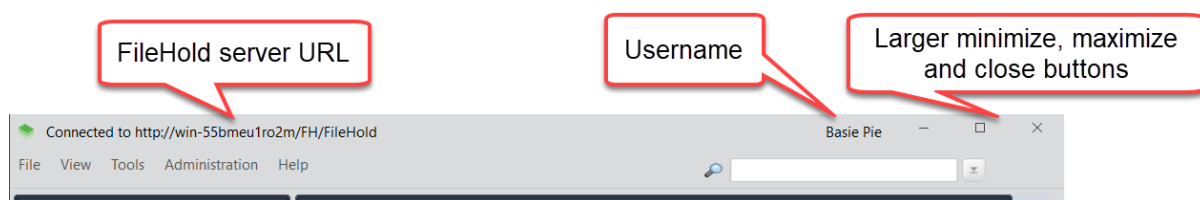
Library Audit Log				
<input type="checkbox"/> User name <input type="text" value="Basie Pie (13)"/>				
<input checked="" type="checkbox"/> Description contains <input type="text" value="contract manager"/>				
<input type="checkbox"/> From <input type="text"/> To <input type="text"/>				
<a href="#">Apply Filter</a> <a href="#">Export as CSV</a>				
Page size 30				
Full name	User login name	Description	Action Date	Affected documents
sysadm	sysadm (1)	<a href="#">1 value(s) for: Contract manager (41) were updated</a>	2019-10-21 13:07:40 -07:00	0
sysadm	sysadm (1)	<a href="#">Added metadata field: Contract manager (41)</a>	2019-10-17 10:52:23 -07:00	0
sysadm	sysadm (1)	<a href="#">3 value(s) for: Contract manager (41) were updated</a>	2019-10-17 10:52:23 -07:00	0

Library Audit Log - Dropdown changes		
		Page size 30 <span>Back</span>
Action	Updated menu option	Original menu option
Added	April Ludgate	

## 10.8. New FileHold Desktop Application header

New larger minimum, maximum, and close buttons have been added to the FDA header. This makes it easier for users to access these buttons.

The server URL has also been added to the header. This allows users to quickly see what FileHold server they are connected to or disconnected from. This is helpful if an organization has multiple FileHold servers.



## 10.9. Users list enhancement

Information about domain groups has been added to the Users page. This makes it for easier for system administrators to see what domain group a user is in without having to go into the user properties.

The User type column now states if the placeholder domain group belongs to a "Domain group". The Inherited groups column displays the name of any FileHold groups that have a domain group assigned to it and the user is a member of.

**NOTE:** Domain group proxy users are always "disabled". To see the domain group proxy users in the Users list, make sure the User status column displays values that are "false" or clear the filter to see all statuses.

The screenshot shows the 'Manage users' table. Callouts point to the following elements:

- New User type "Domain group":** Points to the 'User type' column.
- The "QA Unit" domain group is a member of the "QA team" FileHold group:** Points to the 'Group(s)' column for the 'QA Unit' row.
- "Inherited groups" shows the FileHold groups that the domain group is assigned to:** Points to the 'Inherited groups' column.

Full name	User login name	User status	User license	User type	Domain	Group(s)	Inherited groups	Last login
QA Unit		Disabled	Full	Domain group	DC2012	QA team		
Basie Pie	Basie	Enabled	Full	Local user		Editors, Engineering, Human Resources		
Deborah Dixon	Deborah	Enabled	Full	Local user		Accounting, Cabinet Administrators, Mail Room		
Library Admin	libadm	Enabled	Full	Local user		Library Administrators		
Limited User	limiteduser1	Enabled	Limited	Local user		Limited Users		
QA Cabinet Administrator	QA-CabAdmin	Enabled	Full	Domain user	DC2012	Cabinet Administrators	QA team	
QA Document Publisher Delete	QA-DocPubDel	Enabled	Full	Domain user	DC2012		QA team	
QA Document Publisher	QA-DocumtPublisher	Enabled	Full	Domain user	DC2012		QA team	
QA Editor	QA-Editor	Enabled	Full	Domain user	DC2012		QA team	

### 10.10. Multi-factor authentication with Duo

To specify the Duo username, a configuration option is now available in the web.config file in *C:\Program Files\FileHold Systems\Application Server\UserRoleManager*. The following key can be set to "guid", "email", or "userid". "Guid" is the default username.

```
<add key="DuoUsername" value="guid" />
```

## 11. RESOLVED ISSUES

ID	Title
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.
12028	System needs better error-handling messages when the "FH email notifications" scheduled task(s) fail(s) due to very huge number of related database table records.
12111	The [[sys user-id]] tag displays an internal user id instead of the administrator defined user id.
12138	(Web Client) Senior library administrator should be able to access the Administration reports > Effective permissions report.
12168	(Courier) Cannot cancel a pending Courier transmission if the one-time license issued from a now locked license pack.
12183	(Server installer) Failed to handle the name of the FileHold server with more than 15 characters in it during the install process.
12208	(Pre-install HealthChecker) Tool failed to detect the non-installation of ASP.NET 4.5 component in the IIS server role on a Windows Server 2012 R2.
12652	(Web Client) 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.
12672	Unhandled exceptions found in the server's event viewer which occurred in various areas of our application.
12680	(Active Directory) Exception thrown during synchronization with certain objects in the domain.
12722	Missing group membership for the users who belong to the domain group in the Users list.
12770	The 'Has Markups' field does not appear in the metadata panel of a document if the 'RedactionModule' feature was not enabled in the system license.
12776	(HealthChecker) APIKit-related errors appear in the DII files section of the HTML report file.
12786	(FDA) Session token is not being refreshed during file upload process.
12832	(Workflow) Wrong value found in the 'Participant responses' field of the workflow email notification related to an external signature activity.
12867	(FDA) Back to folder button takes user to wrong location under certain conditions.
12868	Missing divider between the public views and the personal views lists found in the 'Select view' drop down field of a folder list.



ID	Title
12873	Column headers do not sort properly when using a custom view associated with a multi-select dropdown and drill down menu metadata fields.
12895	(FHIT) Existing 'Limited' local user(s) were converted to 'Full' domain user(s) after the merge users tool process.
12896	(SmartSoft Capture) Certificate errors and other SSL related problems may cause a license failure without appropriate error details being provided to the user.
12906	(FDA) List of document schemas in the 'Document schema name' field found in the Document Usage Log is not sorted alphabetically.
12940	Manage imports may map the wrong value for a database dropdown field when used with a schema lookup.
12952	(FDA) Email address validation with a top-level domain consisting of 5 characters or more will fail unnecessarily.
13041	(FOC) It is not possible to select the 'Delete Local Copy' option under certain conditions.
13058	(FHIT) Custom database prefixes with multiple underscore characters cause a configuration error.
13133	(FOC) Failed to delete local copy of file upon checking-in a new version with the 'By default delete docs that a user checks in' option enforced.
13137	(Workflow) Unexpected error occurred upon initiating a 'custom-named' Workflow template for a document associated with deleted metadata fields.
13142	(Workflow) Incorrect document format error when file extension uses upper case letters in "Convert to PDF".
13163	(Server updater) New "sysadm" email address entered in the upgrade wizard dialog was not saved during the upgrade process.
13171	(Server installer) Cannot provide a database prefix with value containing number(s) in it.
13198	(Workflow) Task instructions as received from workflow notification were truncated to 1000 characters.
13276	(FDA) 'F5' does not refresh document status in the 'Documents associated with <workflow name> workflow'.
13319	(FDA) 'Limited user' should not be able to remove page(s) from a document through PDF/Image viewer.
13323	(Workflow) Adobe external signature authorization token allowed to expire too early or too late depending on local time zone.
13337	(Courier) Users designated as optional viewers in a transmission with approvers may receive viewing reminders after the transmission has been approved.
13342	Dropdown menu metadata field database synchronization does not work with the MySQL ODBC driver.
13348	(SmartSoft Capture) Unexpected error thrown when a user's Capture session in the FDA has expired.
13473	(FDA) Highlight words in search results – dtSearch generated HTML that cannot be sent over a web service.

ID	Title
13489	(FDA) System may add an extra & (ampersand) to the name of a document.
13500	(Workflow) Delegated user received an email notification even if the workflow activity is not active yet.
13509	SSL certificate errors are reported as a simple connection problem when testing a connection or testing a login on the FDA connection settings dialog.
13514	(Pre-installation Health Checker) There is a false error detected in the FileHold service account when the domain controller name is not a part of its FDQN.
13562	(Pre-installation Health Checker) Tool may display confusing information in reference to ASP.NET or .NET Framework version needed installed on the FileHold server.
13603	(Workflow) System failed to automatically remove a disabled user from a workflow template.
13613	(FDA) Unexpected error occurred when attempting to add a PDF file associated with an Extraction rule referencing an invalid date in the PDF.
13614	(FDA) Password-protect feature when assembling doc to PDF is not working properly.
13640	Search for specific domain group name may not find any results in the Select Member(s) list when attempting to add a member to a FileHold group.
13676	Wrong value found in the 'Total files in the index' field of the FTS status page after FTS-indexing of database files such as CSV, Microsoft Access, etc..
13696	Specifying to include CSV files in the full text search index in the "IncludedFilesList" key in the FullTextSearch's web.config is affected by its precise positioning in the list.
13702	(Workflow) Insufficient permissions error may occur when attempting to perform an approval postponed of a workflow to restart from a previous activity when schema "hidden until approved" option is set.
13703	Search button user interface issues found in Advanced search.
13705	(FDA) System does not properly refresh the Courier recipients list when attempting to remove any recipient from the list.
14220	When a system exception occurs when attempting to send a license deactivation warning email notification, the exception is not added to the log.
14237	Wrong effective permissions displayed for a disabled admin user on a cabinet/folder.
14238	(FDA) Drop-down and drill-down menu fields are not selectable when trying to copy or move documents to an auto-tagged folder.
14247	Limited users can only log in once to a specific client type.
14267	System does not release 'guaranteed system access' from a disabled user.
14270	(Health Checker) Wrong OS version field value found in the HTML report on various supported Windows server versions.
14271	(Workflow) Adobe external signature callbacks that fail to execute are not retried.
14311	Failed to publish a new version of a checked-out document using the FileHold viewer.

ID	Title
14346	(FDA) Failed to select a value in the dropdown menu database field upon tabbing back from another field.
14359	(Workflow) Unexpected error occurred when you try cancel review/approval task after completed External signature task when using the "reinstate the source document version as the current version" option.
14424	(Courier) Unexpected error occurred upon opening a 'View' transmission where the associated document was deleted.
14453	(FDA) Unexpected error thrown upon opening a file in the FileHold viewer with the 'Automatically open in the viewer...' option enabled.
14484	System should not send event notification related to document(s) which have already been archived
14491	Wrong value extracted from the [ActivityDescription] field when used as a key in a workflow email notification template
14534	Strange cases of Adobe Sign callbacks could cause the incorrect signing state for an external signature activity.
14556	List of users not refreshed when repeating a search in change cabinet/folder owner.
14558	An auto-tagged folder cannot be seen by a user with an administration role when the user has a reduced role in the folder and is not explicitly included in the document schema membership.
14569	User activity log "full name starts with" filter can only find exact name matches.
14721	The "Load User Profile" setting of the FHAppPool found in the Advanced Settings > Process Model in IIS Manager was reset back from "True" to "False" after upgrading from a previous FileHold server version to 16.2.
14858	It is not possible to add a UTC offset value in increments of less than one hour.
14908	Upgrading from FileHold 16.1.1 to 16.2 removes the permissions for the local group "Users" requiring manual intervention following upgrade for Integrated Windows Authentication to work.
15074	Email extraction rule failed for a small class of emails.
15255	UTC converter incorrectly updates default value for CheckOutDate in new records. This causes Server-side OCR to not function for these documents and may have other side effects.
15331	(Server updater) SQL script error occurred when trying to upgrade from FH15.1 to 16.2 with SQL Server 2008 R2 SP3 as the database version.
15382	(FDA) Prevent from adjusting columns when the server returns deadlock.
15446	(FOC) FileHold Office client not showing on any Office ribbons for O365 64-bit installs
15648	Fix for Telerik security issue: CVE-2017-11357 and CVE-2019-18935.
15779	(FDA) Unexpected deletion of files listed in working documents in a few circumstances.
15806	(FDA) Incorrectly naming files created from the Outlook watched folder when the email subject contained certain reserved characters and or names.

ID	Title
15817	(FDA) High processing overhead related to the working documents database that worsened as the number of working documents increased and made more noticeable when the working documents were stored on a slow device. Note that the progress indicator for uploads may be affected by this change.
15955	(FOC) Exception thrown upon selecting a saved search to choose a file to attach to a replied/forwarded Outlook email message.
15991	Incorrect file deletion logic in Working Documents Database.
15996	(FDA) Deletes local copy of working document after the second attempt to 'get a file copy' in a specific scenario.
16003	Incorrect behavior of "old version" documents in Working Documents Database.

## 12. KNOWN ISSUES

ID	Title
8530	(FDA) Word table not correctly formatted in Brava viewer.
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).
13444	FileHold viewer cannot display embedded documents.
13556	(FDA) Viewer state not correctly restored after workstation sleeps or hibernates for an extended period.
14353	FileHold viewer annotations may be lost on PDF pages that do not correctly follow the PDF standard.
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.

ID	Title
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.
14554	ADI uses the wrong time when no specific value assigned and default for the field is current date:time.
14555	In an ADI job for a watched folder with fixed metadata values, a dropdown menu value may revert to its original configuration following an edit to the job.
15309	(FOC) FileHold Office Client not able to add a document opened from Microsoft Teams.
15368	'Export to Excel/CSV' option in the Manage users list failed to export remaining number of users/objects beyond 100.
15638	Options for the FileHold level 2 viewer are not available when there are no level 2 licenses in the system, but Brava viewer licenses are present.
15656	(FDA) Cannot see the properties of the file in the metadata panel from the History of document versions from the Show Documents > Version History.
15706	(FDA) 'Send to > Printer' option is missing from a file's context menu option.
15719	Linked documents sent to the Library archive does not appear in the linked files list of the parent document.
15721	Deleted documents in soft deletion stage still appear in 'My Document Alerts'.
15756	(ADI) Exception thrown when using the 'Document schema default' auto-filing option for an indirect metadata import job.
15786	Metadata field set as 'Required' and 'Read-only' during schema setup is not being properly checked for the global read-only constraint setting.
15838	(FTS) Library archive files were not 'FTS-indexed' after initializing/re-indexing document repository.
16007	(WebClient) Menu items to choose from the drop-down list don't appear after performing a quick search > In List.