FileHold

Document & Record Lifecycle Software

RELEASE GUIDE

VERSION 14.2 HF1

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1. FILEHOLD 14.2 OVERVIEW

This document is a high level description of the new features and enhancements of FileHold 14.2.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 14.2

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

2.2. Database Server

- SQL Server 2005 SP2 Enterprise (32 bit)
- SQL Server 2005 SP2 Standard (32 bit and 64 bit)
- SQL Server 2005 Express (32 bit)
- SQL Server 2008 (64 bit)
- SQL Server 2008 R2 (64 bit)
- SQL Server 2008 Express (64 bit)
- 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

2.3. Web Browser Support

- Internet Explorer 8.x, 9.x, 10.x, and 11.x (32 bit and 64 bit)
- Mozilla Firefox - current version

- Google Chrome - current version
- Safari 5.1 (tested on Windows only) (not supported for WebCap)

2.4. FDA Operating System

- Windows XP SP3 (32 bit)
- 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.)

2.5. Microsoft Office Support

- Microsoft Office Professional 2003 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio)
- Microsoft Office Professional 2007 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio)
- 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)

2.6. 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)

2.7. Mobile Platforms Support

- iPhone 5 with iOS 7 and Safari
- Samsung Galaxy Ace 2 and Samsung Galaxy SIII Mini with Android 4.0 (Jellybean) and Chrome

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.

2.8. WebCap / Web Viewer Support

- Internet Explorer 8.x, 9.x, 10.x, and 11.x
- Mozilla Firefox – current version
- Google Chrome – current version

2.9. Print to FileHold

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

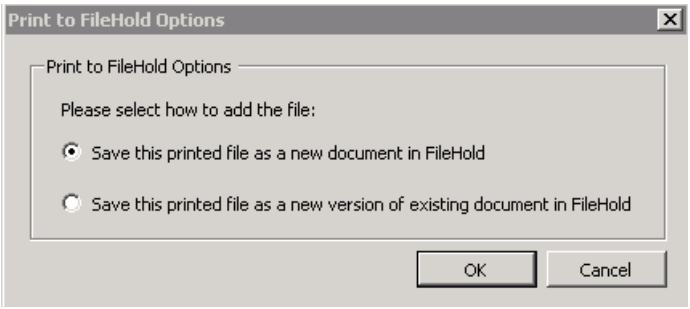
- Windows 8 and 8.1 (32 bit and 64 bit) – Professional and Enterprise editions
- Windows Server 2008R2
- Windows Server 2012R2

3. PRINT TO FILEHOLD

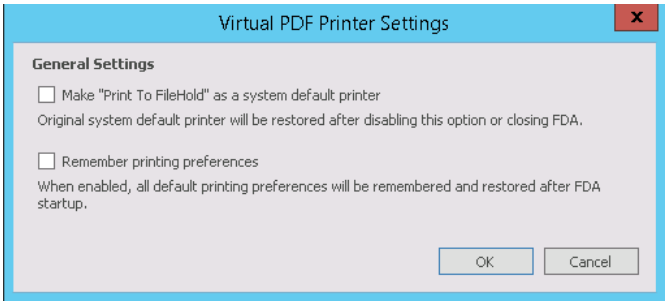
Print to FileHold is an automated way to get documents into the FileHold library from any third party application that supports the ability to print a document. Print to FileHold is a virtual printer that converts the document to a PDF and then allows you set the destination folder, document type, and metadata through a FileHold window. It works in conjunction with the FileHold Desktop Application.

When using the Print to FileHold virtual printer, the PDF document can be added as a new document or checked in as a new version.

In order to use the virtual printer, the FileHold Desktop Application (FDA) must be running and the user must be logged in for licensing reasons. You cannot use the virtual printer without the FDA running.



You can set the Print to FileHold printing preferences in the FDA to make Print to FileHold the default printer and remember most printing preferences on the local computer.



Print to FileHold now support Windows 8, Windows 8.1, Windows Server 2008R2 and Windows Server 2012R2.

Print to FileHold is a separate installer and must be installed on each workstation. A silent installer is now available for use for Print to FileHold.

4. ADMINISTRATION PANEL

The system administration and library administration have been merged into a single Administration panel. End user preferences and settings (user, view, alert) are also available in the Administration panel in addition to the FileHold library area.

The table below outlines the location of the menu items in the administration panel and where they are located relative to previous releases and the minimum role needed to access that menu item.

If Solo Mode is enabled, then only one section of the Administration Panel will expand at a time. If Solo Mode is disabled, then all of the sections can be expanded and the Collapse All button is available.

Note that for Cabinet administration and Library administration, the menu items are only available for those cabinets they are an owner of in the library tree.

Menu Item Location in 14.2 Administration Panel	Menu Item Location in 14.1 and Earlier Versions	Minimum Role Required to View Menu Item in Administration Panel
My FileHold > View preferences	N/A	Read only
My FileHold > Alert preferences	N/A	Read only
My FileHold > User preferences	N/A	Read only
Workflow management > Status report	Library admin > Workflow > Status Report	Read only
Workflow management >Dashboard	Library admin > Workflow > Dashboard	Read only
Library management > Undo checkout	Library admin > Library Utilities > Check-in for User	Cabinet administration
Library management > Change document owner	Library admin > Library Utilities > Change Document Owner	Cabinet administration

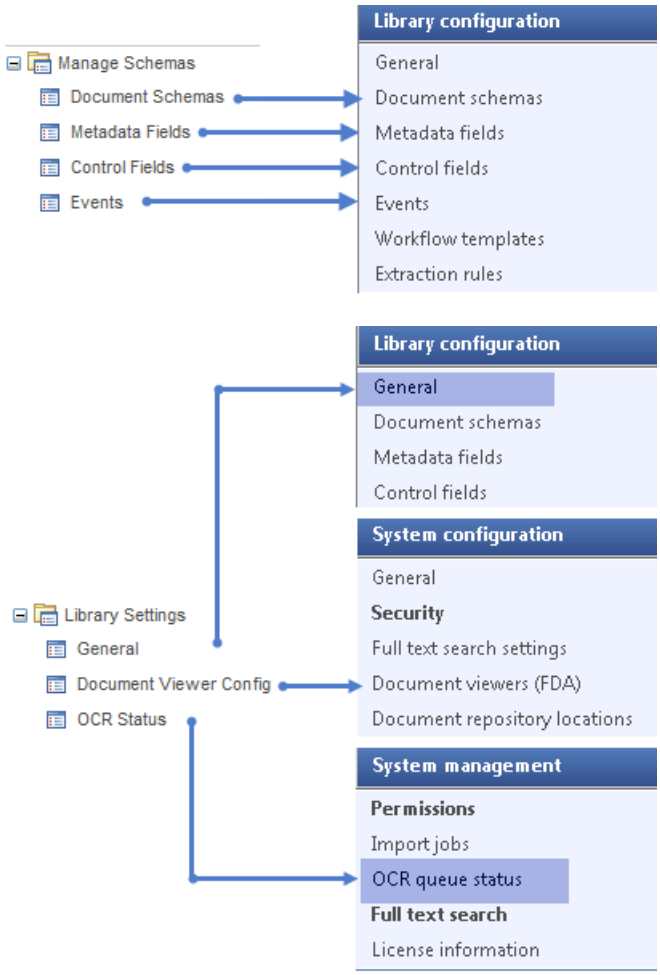
Menu Item Location in 14.2 Administration Panel	Menu Item Location in 14.1 and Earlier Versions	Minimum Role Required to View Menu Item in Administration Panel
Library management > Change cabinet/folder owner	Library admin > Library Utilities > Change Cabinet/Folder Owner	Cabinet administration
Library management > Recover documents	Library admin > Library Utilities > Recover Documents	Cabinet administration
System management > Permissions > User	System admin > User & Group Management > Users	System administration
System management > Permissions > Group	System admin > User & Group Management > FileHold Groups	System administration
System management > Permissions > Custom reports	Library admin > Reporting Services > Security	System administration(*)
System management > Import jobs	Library admin > Automatic Document Importation > Import Jobs	Senior Library Administration
System management > OCR queue status	Library admin > Library Settings > OCR Status	Senior Library Administration
System management > Full text search > Status	Library admin > Search Engine > Status	Library Administration
System management > Full text search > Unindexed files	Library admin > Search Engine > Unindexed files	Library Administration
System management > Full text search > Errors	Library admin > Search Engine > Errors	Library Administration
System management > License information	System admin > Global Settings > License Information	System Administration
Administration reports > User activity	System admin > Logs and Reports > Activity	System Administration
Administration reports > Document usage log	Library admin > Library Utilities > Document Usage Log	Cabinet Administration
Administration reports > Library audit log	Library admin > Library Utilities > Audit Log	Senior Library Administration
Administration reports > System audit log	System admin >Logs and Reports > Audit Log	System Administration
Administration reports > Insufficient sessions	System admin > Logs and Reports > Insufficient sessions	System Administration
System configuration > General	System admin > Global Settings > General	System Administration
System configuration > Security > Logon	System admin > User & Group Management > Logon and Password Security	System Administration

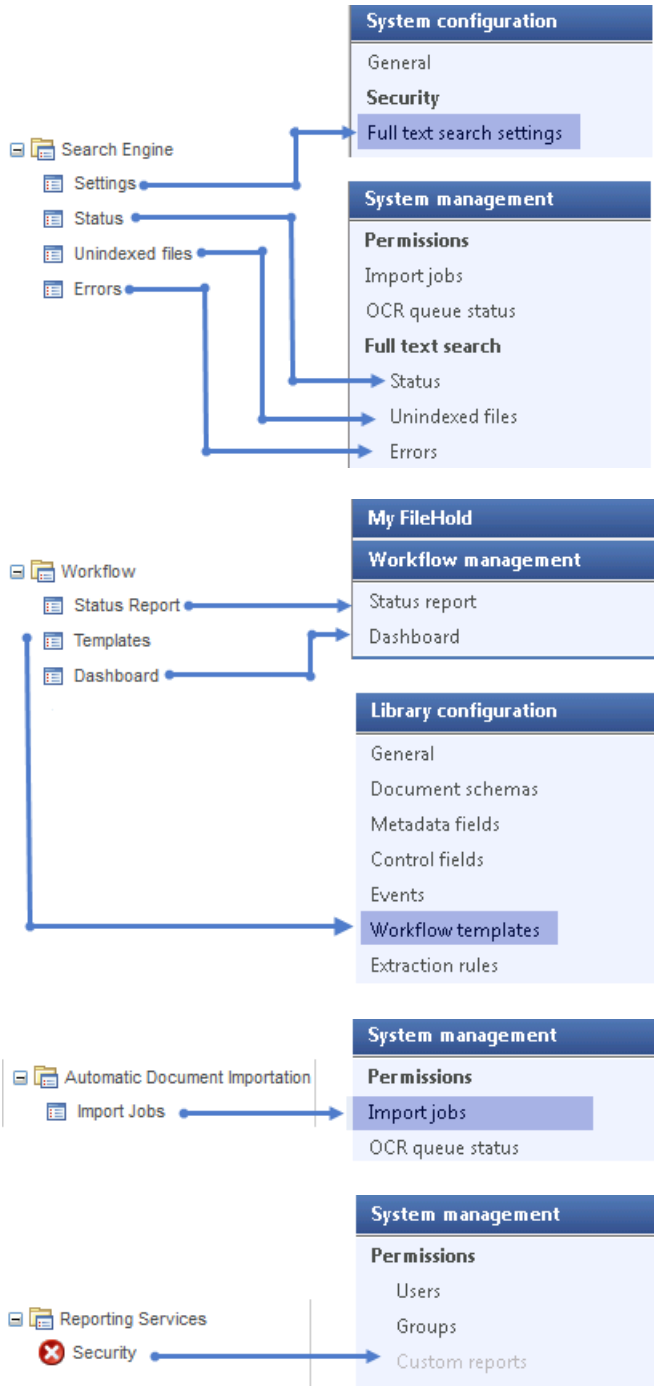
Menu Item Location in 14.2 Administration Panel	Menu Item Location in 14.1 and Earlier Versions	Minimum Role Required to View Menu Item in Administration Panel
System configuration > Security > Self registration	System admin > User & Group Management > User Self Registration	System Administration
System configuration > Full text search settings	Library admin > Search Engine > Settings	Senior Library Administration
System configuration > Document viewers (FDA)	Library admin > Library Settings > Document Viewer Config	System Administration(*)
System configuration > Document repository locations	System admin > Global Settings > Repository Locations	System Administration
Library configuration > General	Library admin > Library Settings > General	Senior Library Administration
Library configuration > Document schemas	Library admin > Manage Schemas > Document Schemas	Library Administration
Library configuration > Metadata fields	Library admin > Manage Schemas > Metadata Fields	Library Administration
Library configuration > Control fields	Library admin > Manage Schemas > Control Fields	Library Administration
Library configuration > Events	Library admin > Manage Schemas > Events	Library Administration
Library configuration > Workflow templates	Library admin > Workflow > Templates	Library Administration
Library configuration > Extraction Rules	N/A	Senior Library Administration
Centralized options management > Alert preferences	System admin > Centralized Options Management > Alert Preferences	System Administration
Centralized options management > Workflow preferences	System admin > Centralized Options Management > Workflow Preferences	System Administration
Centralized options management > FastFind preferences	System admin > Centralized Options Management > FastFind Preferences	System Administration
Centralized options management > Miscellaneous preferences	System admin > Centralized Options Management > Misc Preferences	System Administration
Centralized options management > FDA preferences	System admin > Centralized Options Management > FDA Advanced Settings	System Administration

Menu Item Location in 14.2 Administration Panel	Menu Item Location in 14.1 and Earlier Versions	Minimum Role Required to View Menu Item in Administration Panel
Centralized options management > Advanced search preferences	System admin > Centralized Options Management > Advanced Search Options	System Administration
Administration Reports > Effective Permissions	N/A	System Administration

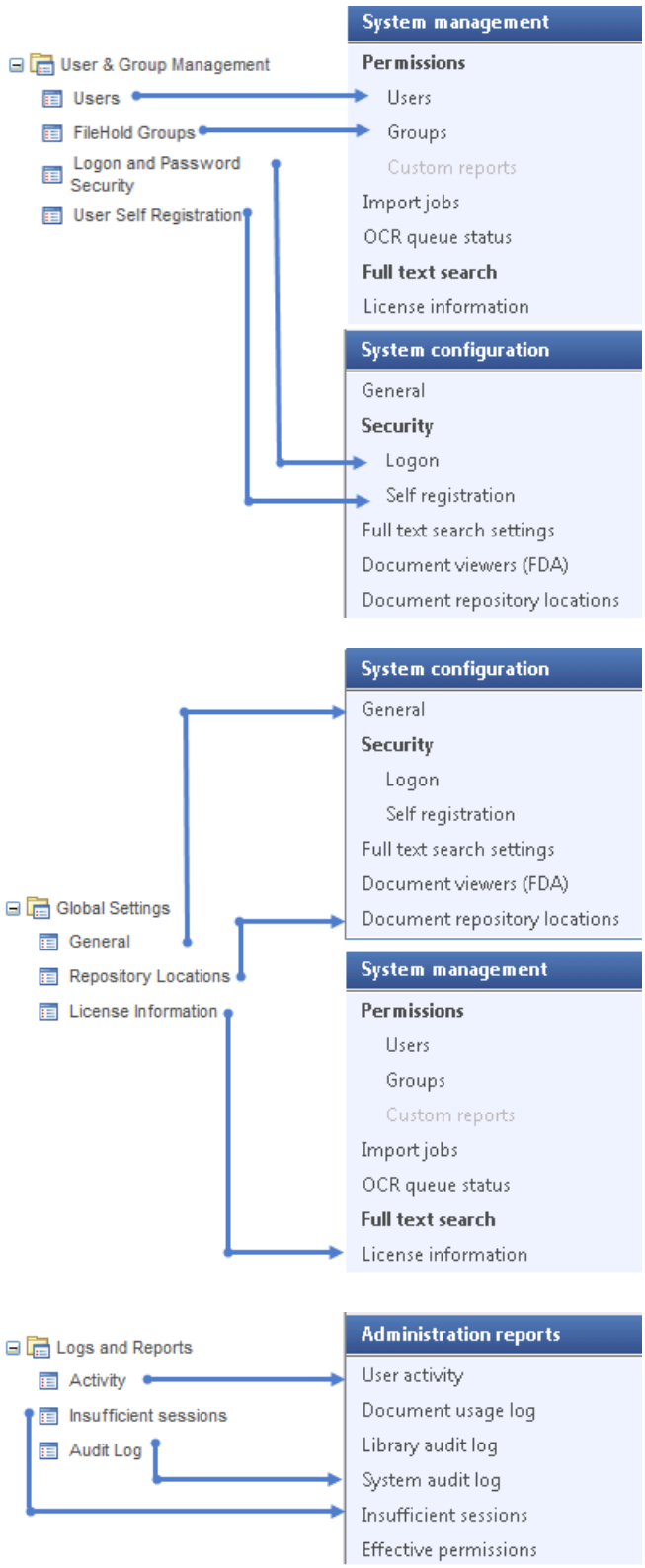
(*)Indicates that permissions have changed from Senior Library Administrator to System Administrator

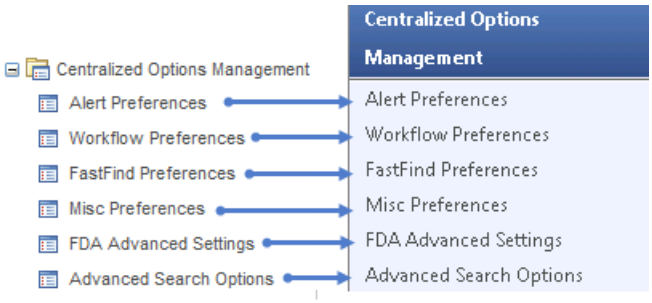
The following images show the location of the Library Administration menu items for FileHold 14.1 and earlier versions on the left side and for FileHold 14.2 on the right side.





The following images show the location of the System Administration menu items for FileHold 14.1 and earlier versions on the left side and for FileHold 14.2 on the right side.


User & Group Management
Users
FileHold Groups
Logon and Password Security
User Self Registration
System management
Permissions
Users
Groups
Custom reports
Import jobs
OCR queue status
Full text search
License information
System configuration
General
Security
Logon
Self registration
Full text search settings
Document viewers (FDA)
Document repository locations
Global Settings
General
Repository Locations
License Information
System configuration
General
Security
Logon
Self registration
Full text search settings
Document viewers (FDA)
Document repository locations
System management
Permissions
Users
Groups
Custom reports
Import jobs
OCR queue status
Full text search
License information
Logs and Reports
Activity
Insufficient sessions
Audit Log
Administration reports
User activity
Document usage log
Library audit log
System audit log
Insufficient sessions
Effective permissions



5. AUTOMATIC DOCUMENT IMPORTATION

There are some enhancements to the feature Automatic Document Importation (or ADI).

5.1. Use of Extraction Rules

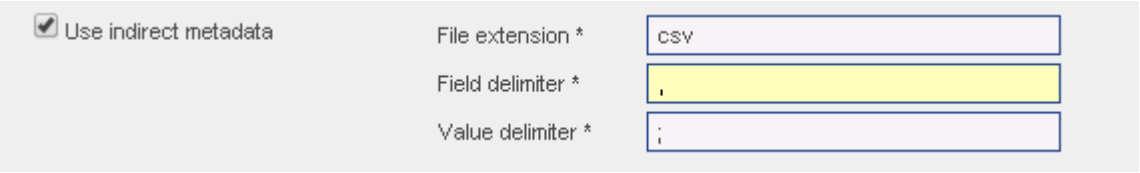
Using the import jobs extraction rules are now applied to documents that are imported. The extraction rule is used when the import job is set to use the same schema as the rule. The metadata values that are extracted through the extraction rule take precedence over the metadata values set in the import job. If there is no value mapped in the rule, then the value set in the job is used.

5.2. Extract Metadata Values from a CSV File

In a Watched Folder type import job type, formerly the metadata values for an import job were set in the job and were static. In this release, you can use a text delimited file, such as a CSV, that contains the schema, full path and document name, and metadata fields and values, to define the values that populate the metadata fields. This allows you to import documents that have metadata values that vary from document to document.

A new option, called Use Indirect Metadata is available in the import job. When selected, the file extension (typically csv or txt), field delimiter (typically a comma or semicolon) and the value delimiter (typically a comma or semicolon) which is used for multiple selection type metadata fields become available. Note that the field delimiter and the value delimiter cannot be the same. Field and value delimiters can be any Unicode character. For metadata field names and drop down list values, they must match the configuration in FileHold exactly (for example, no spelling errors).

Offline documents can now be added with ADI using an API-based import or the indirect metadata method. For the indirect metadata method the schema listed in the text delimited file must be an offline document schema.



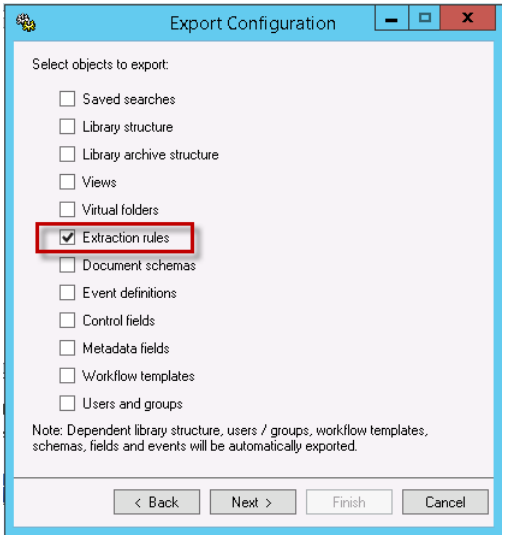
6. EXTRACTION RULES

Extraction rules are now available in the Web Client Administration Panel in Library Configuration > Extraction Rules. They were previously only available in the FileHold Desktop Application (FDA).

Email, File Properties, XML Node, and PDF Forms rules can be created. Any rules created in the Administration panel will appear in the FDA and vice versa.

Extraction rules can now be used in conjunction with the Import Jobs (Automatic Document Importation). The extraction rules are automatically applied when an import job is processing documents on the server. Any metadata values extracted take precedence over the metadata values defined in the import job.

Extraction rules are now also exported and imported though the FileHold Instrumentation Tools > FileHold Library Setup tool.



7. UPDATES TO REPORTS

A number of updates have been made to the various reports in the Administration panel.

7.1. Report Filters

The following reports can now be filtered using various criteria. The reports are:

- Insufficient sessions
- System audit log
- Library audit log

Report filters have been added or updated in other reports in order to refine the data:

- User activity
- Users
- Groups
- Document usage log
- Change cabinet/folder owner
- Change document owner
- Undo checkout

7.2. Search Result Totals

The number of results for a given report is now shown. Search results are displayed for the following reports.

- User activity
- Insufficient sessions
- System audit log
- Users
- Groups
- Document usage log
- Library admin audit log
- Change document owner
- Undo checkout
- Change cabinet/folder owner
- Recover documents

7.3. Column sorting

All reports now have the ability to sort all of the columns by clicking on the column header. Columns are sorted in ascending or descending order.

7.4. Report Window Size

The number of rows that are displayed in the report view can be adjusted to show 15, 30, or 60 rows at a time. The reports that have the ability to adjust the window size are:

- User activity
- Insufficient sessions
- System audit log

- Users
- Groups
- Document usage log
- Library audit log
- Undo checkout
- Change document owner
- Change cabinet/folder owner
- Recover documents

7.5. Exporting Report Results as a CSV File

The results from a report can now be exported to a CSV file once a report has been run. The Export as CSV button is available in the following reports:

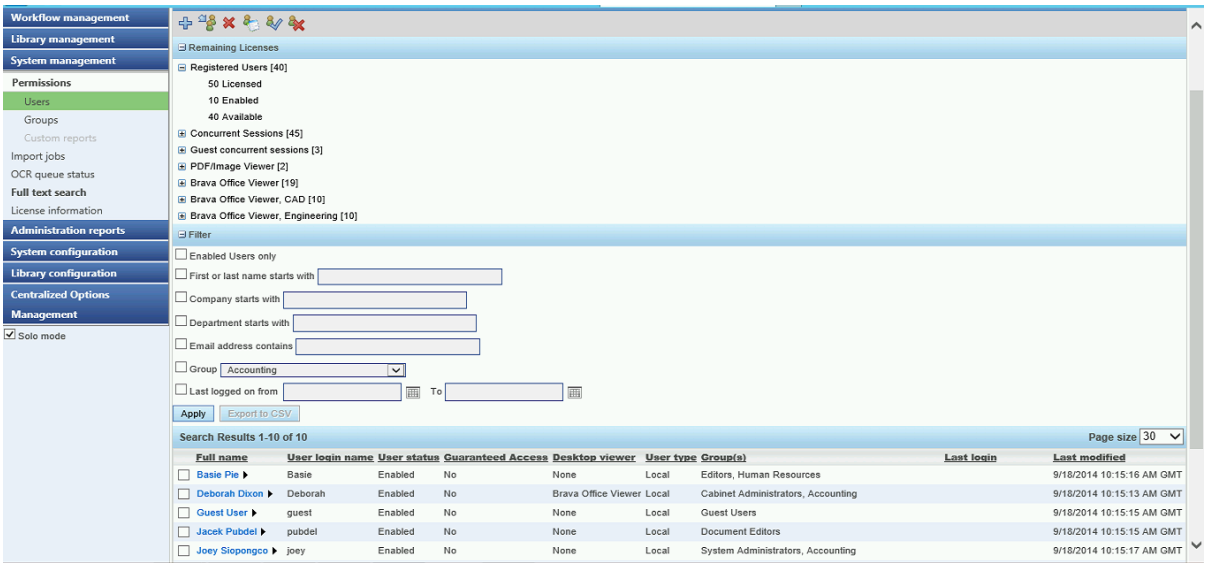
- User activity
- Insufficient sessions
- Document usage log
- Library audit log
- System audit log
- Undo checkout
- Change document owner
- Change cabinet/folder owner
- Users
- Groups

7.6. Users List

The list of users is accessible in the Administration Panel in the Web Client under System Management > Permissions > Users.

The Users list has been modified to include a remaining licenses panel and a filter panel. The Remaining Licenses area contains a summary of the purchased licenses: registered users, concurrent sessions, viewers, WebCap scanning licenses, and web viewers. The various licensing options can be expanded or collapsed by clicking on the + or -. The number of licenses remaining is shown in brackets.

The Filter area can be used to narrow down the users displayed in the search results below. Enabled users only, first or last name, company, department, email address, group name, and logged in dates are the filter criteria that can be used.

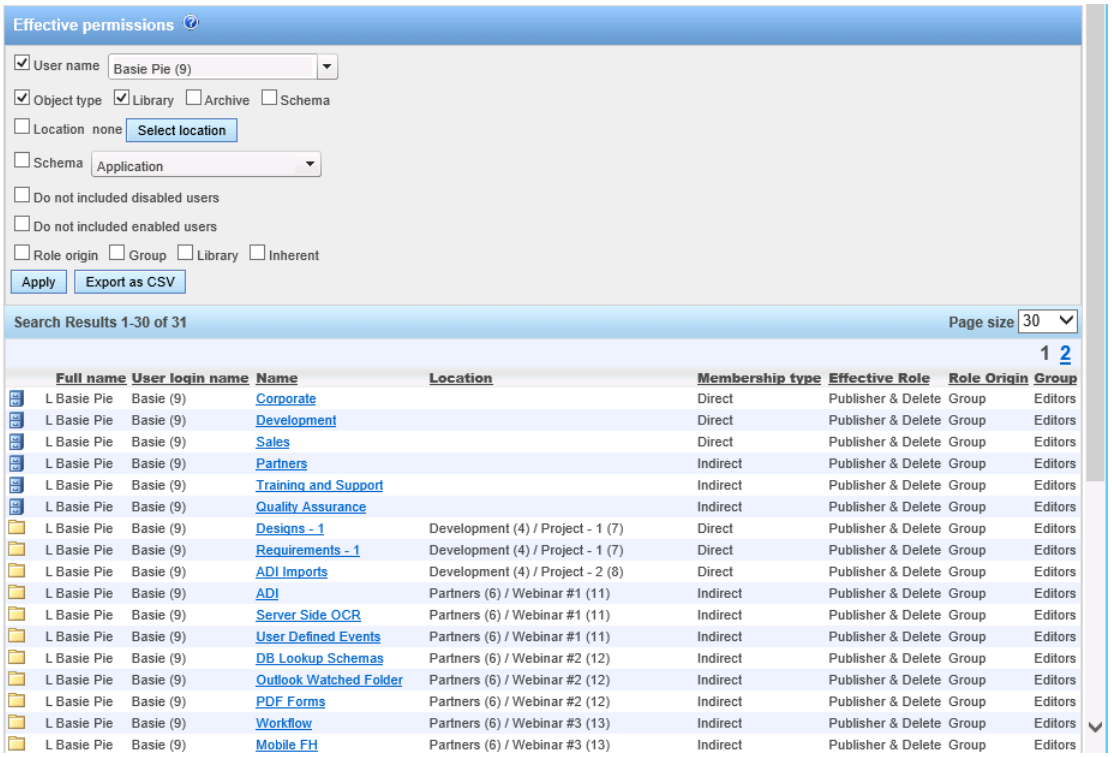


Search results can be exported as a csv file.

7.7. Effective Permissions Report

The Effective Permissions report allows system administrators to view the permissions of users in the system. The report can be filtered by user, the object type (library, archive or schema), library location, schema name, the origin of the role (group, library or inherent), and enabled and disabled users.

The report can be exported to a CSV file once run.



Once the report has been run, you can modify the permissions at the cabinet, folder, and schema levels by clicking on the link in the Name column.

7.8. Document Usage Log

If a user has been deleted from the system, the name of the deleted user appears as “John Smith (143) [deleted 2014-03-07]” in the Action Performer column. The deleted date is appended automatically when a user is deleted.

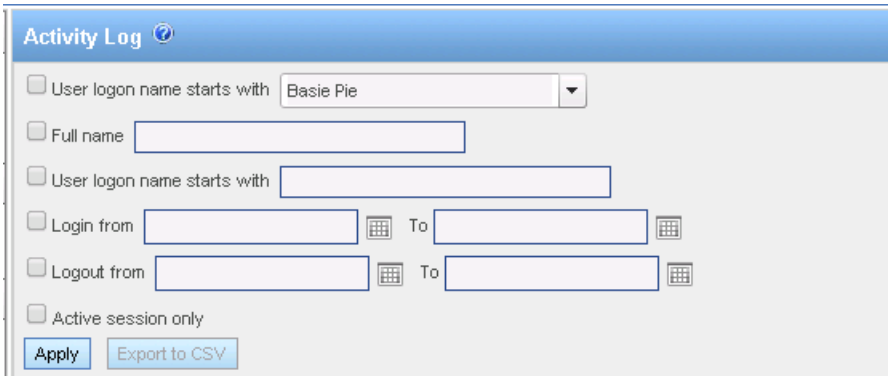
7.9. Activity Log

The Activity log is a report that displays the user name, which client they logged into (FDA, Web Client, Mobile, FH Instrumentation, Microsoft SharePoint, Custom), and the time and date they logged in and out of the system. The Activity Log now contains filters and additional column information in the view.

Available filters include: user name (drop down list), full name, user logon name starts with, login date range, logout date range, and active sessions only (check box).

The following column information is displayed: full name, user login name including the internal ID number (the internal ID number is used to distinguish users with the same name), client, version and build number, connection pool (normal, guest, or SharePoint), client address, log in date and time, log out date and time

The Activity Log is now located in the Administration Panel in Administration Reports > User Activity.



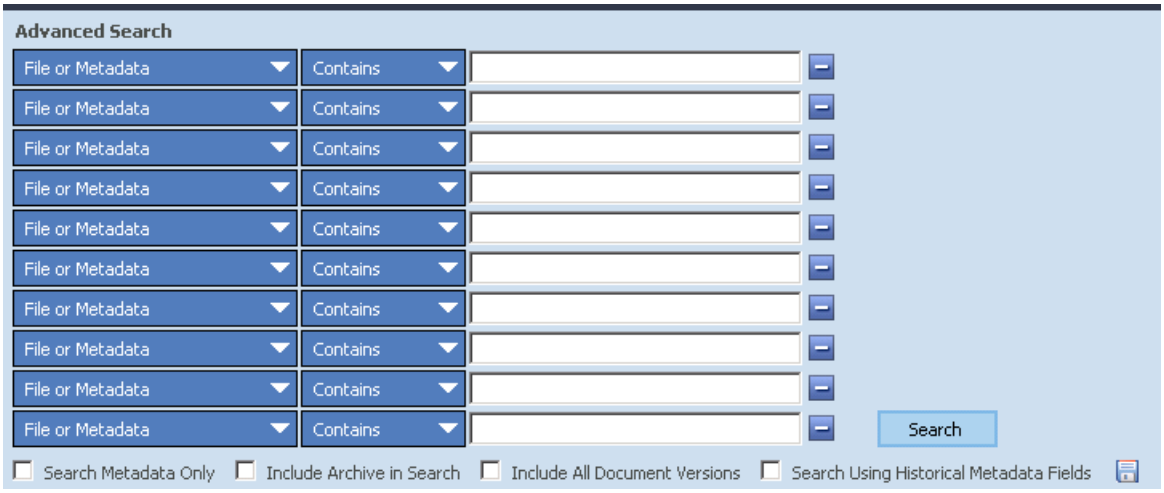
Activity log results can be exported to a csv file.

8. SEARCH IMPROVEMENTS

A number of improvements have been made in the search functionality.

8.1. Number of Advanced Search Fields

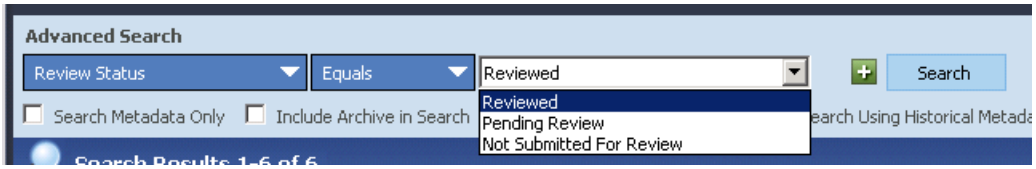
The number of advanced search fields has increased from five to ten.



8.2. Search by Review Status

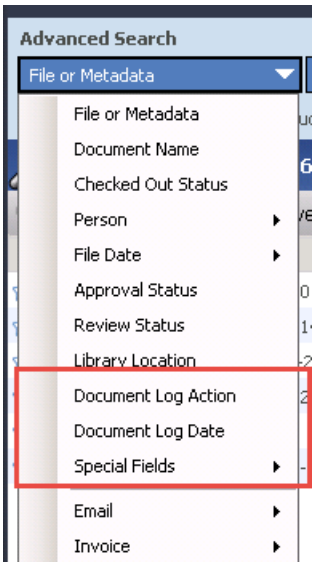
You can now search by the following review statuses:

- Reviewed
- Pending review
- Not submitted for review



8.3. Criteria Selector Menu Adjustment

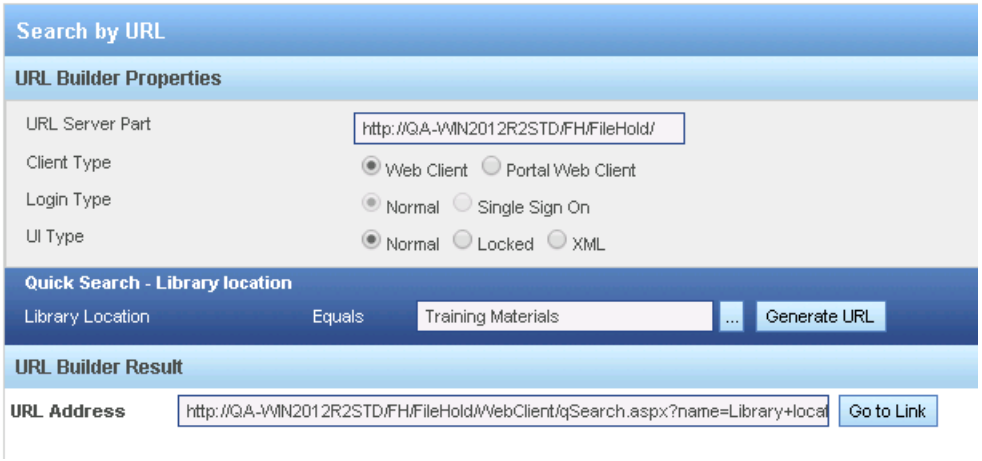
The advanced search criteria selector options: Document Log Action, Document Log Date, and Special Fields have been moved ahead of the metadata fields on the menu.



8.4. Integrating a FileHold Search with an External Application

In this release, a saved quick search can now be invoked through an URL address from an external application. Once the URL is clicked, the search results are displayed in the Web Client. A quick search is a type of saved search where the search template is saved with only one empty variable in the template. When a user runs a quick search, they are required to enter the search term for the empty variable while all other search criteria remain fixed.

A simple tool has been provided for users that do not want to build the URL manually. When a quick search has been created and saved, the URL for the quick search can be created with the URL Builder in the Web Client. In the URL Builder, the server address, the client type (Web Client or Portal Web Client), log in type (local or Active Directory user), UI type (normal, locked or XML), and the quick search value are specified and a URL is generated.



The UI type options determine how the search results are displayed:

- Normal means that the results are displayed in the normal Web Client UI.
- Locked means that the search results are displayed in an embeddable locked view of the web client where only the heading and the document list is found. There would be no processing options, though one of the columns in the search results could be a link to the document for web viewing or downloading. Additional settings are available for modifying the title bar and page numbering in the search results screen when using this option.
- XML means that the search results are returned as an XML document. This can be combined with an XSL style sheet or some other XML processing method to render the precise output the caller desires. The column heading names and column values would be included in the XML as defined in the search view. The XML output include the document ID which can be used to build links for viewing or downloading the documents.

Once the settings for the URL are defined, the URL can be generated. The URL defines the quick saved search name and value(s) for the quick search. For example:

```
http://<servername>/fh/filehold/webclient/qsearch.aspx?name=<quick_search_name>&value=<search_value>
```

Where:

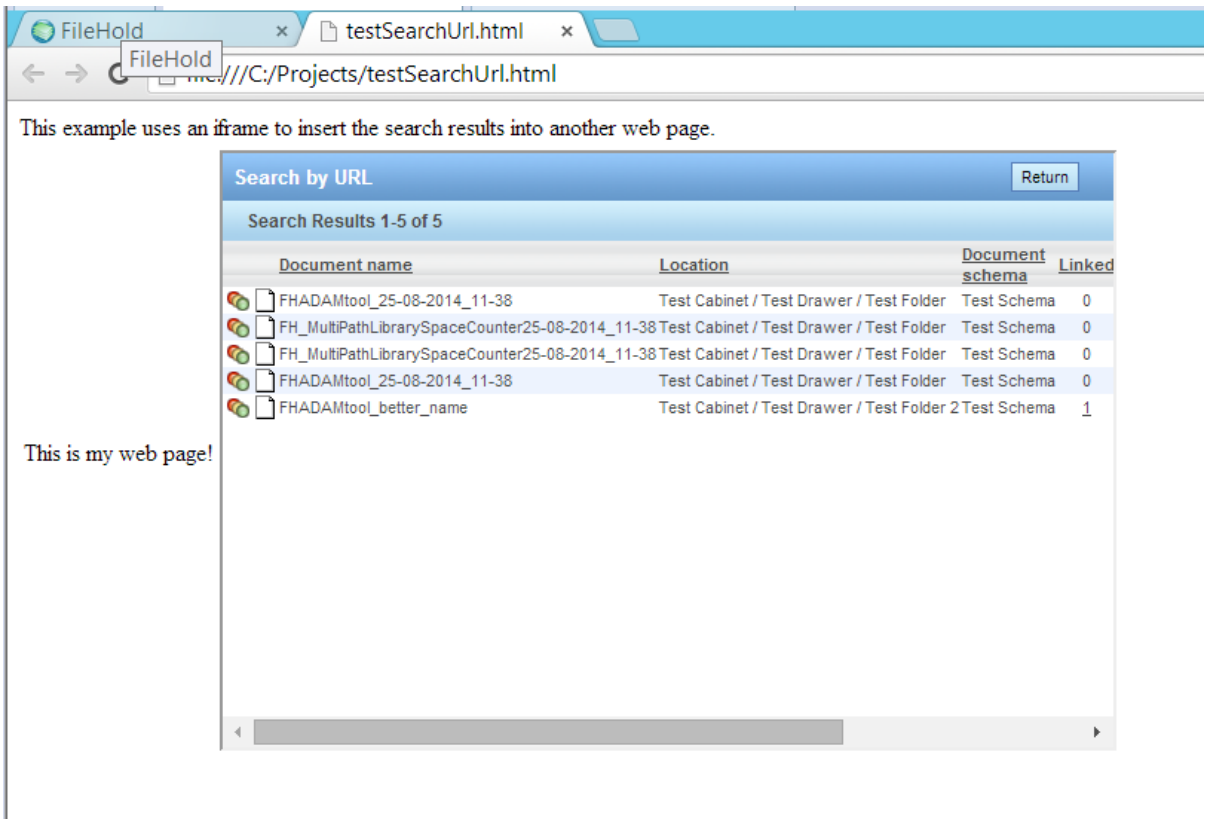
- <servername> is the name of the server where FileHold is installed
- <quick_search_name> is the name of the quick saved search
- <search_value> is the operand value that is used for the search. If more than one value is needed, values can be delimited with a ; (semicolon).

Once the URL for the quick search is clicked from an external application, the saved quick search runs and displays the search results in the selected UI type option. If the user is not logged in, the login screen appears first or the user will be logged in using Windows Authentication (single sign on).

Before this feature was available it would have been necessary for an external application to be able to create a list of links to all the documents it wanted their users to have access to. The quick saved search can have the default view defined so that the desired information is displayed in the search results every time the URL is clicked.

Here is a basic example of how it might look on company's web site. For this example, the URL is specified in an iframe with the UI type in locked mode.

```
<iframe
src="http://yourservername/FH/FileHold/WebClient/qSearch.aspx?name=Doc
+Name&value=fh*&ui=lock" width=600 height=400>
```



Using the option that returns XML, the page can be formatted how you want if XML can be interpreted on your website.

8.5. Search Operators

The NOT operator reverses the meaning of the logical operator with which it is used. Three new NOT operators have been added:

- Does not contain
- Does not equal
- Not in list

8.6. Full Text Search - Wildcard Search Limitation Setting

When a wildcard search (*) is performed in conjunction with the “contains” operator using a common term in the repository there may be a very large number of intermediate search results that must be processed. In this release we have added a parameter where a limitation can be set on the number of results returned when a search like this has been performed. Previously limits could only be set on the final number of results. Care should be taken not to set a value that makes any typical searches impractical. For most users this value does not need to be changed from the default which returns all specified results that can be found before the full text search timeout expires.

The new entry in the web config file in C:\Program Files\FileHold Systems\Application Server\FullTextSearch is under <appSettings>:

```
<add key="LimitNumberOfEntriesToReturn" value="0" />
```

If the value is set to 0, then the limitation is disabled. It is disabled by default.

If a wildcard full text search exceeds the limit set in the web config file then a message is displayed:

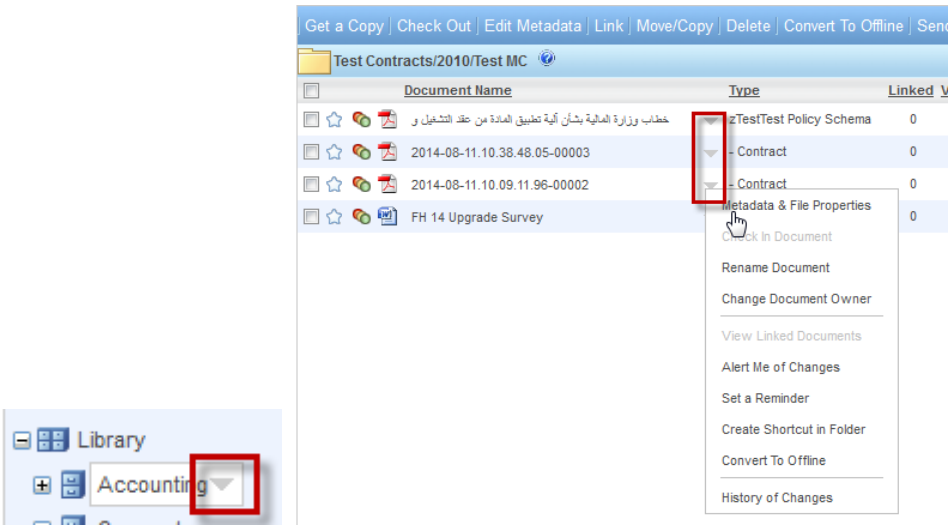
```
“Your search with the CONTAINS operator would consume more server resources than allowed by your system administrator. Consider narrowing your search conditions to reduce the possible results. Your search would have returned {x} documents and your system administrator has set a limit of {x} documents.”
```

8.7. Full Text Search Index Status

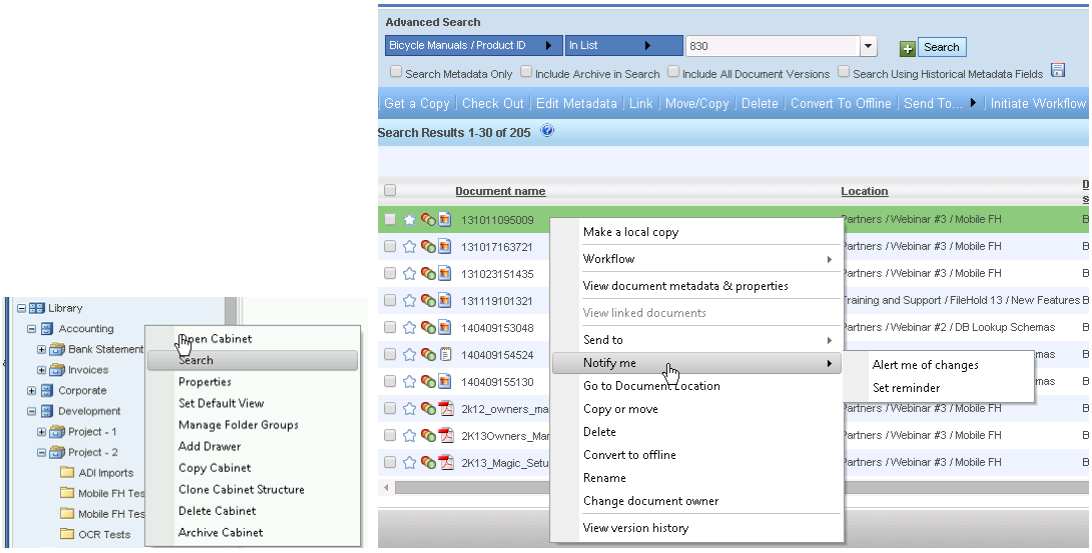
The Full Text Search Status page has been modified to include cleaner language and show only relevant information. The button name has changed from Save Search Status to Create Detailed Report.

9. WEB CLIENT CONTEXT MENU CHANGES

The context sensitive menu is no longer accessible through the arrow key in the library area. The context sensitive menu is now available by right-clicking on the item. New technology has been added to the web client that now allows us to create a context menu that has the same format as the FDA where applicable.



FileHold 14.1 and previous versions context sensitive menu accessibility by clicking the arrow



FileHold 14.2 context sensitive menu accessible by right clicking on an item in the library or document

10. DOCUMENT URL LINKS

Different types of document links can now be configured for the FDA, Web Client, and the guest Web Portal. In previous versions, links for the FDA and Web Client were predefined and unchangeable.

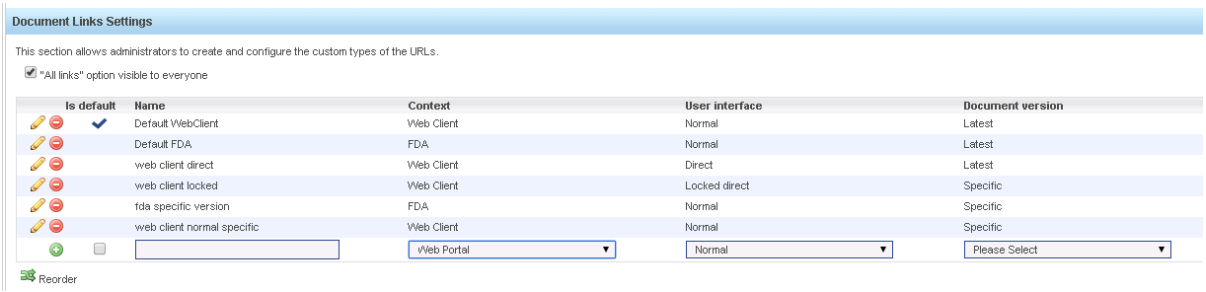
These links can be shown in the metadata pane or included in emails as link type attachments. You can also specify if the link should go to the latest version or a specific version. If the specific version option is configured, then the user is brought to the version history instead of directly to a document. The default URL can also be set.

The URLs are configured in the Administration Panel > Library Configuration > General page.

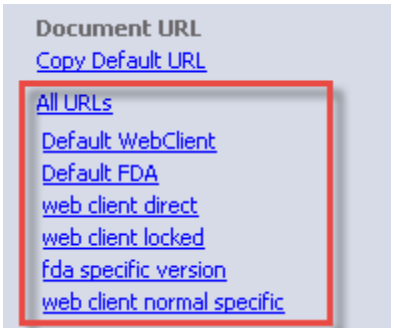
For the web client type links, there are three modes for how the links are executed in the user interface:

- Normal goes directly to the document location and highlights the document through the Web Client.
- Direct mode via Web Client will open the document directly in the FileHold Web Viewer or it will download directly to the browser if there is no Web Viewer or the document format is not supported by the Web Viewer.
- Locked direct (using the UI=Lock option) mode via the Web Client where the document is displayed in the Web Viewer but the rest of the FileHold interface (such as the Library tree and menus) is hidden. This option is meant to be used when integrating the Web Viewer with other applications.

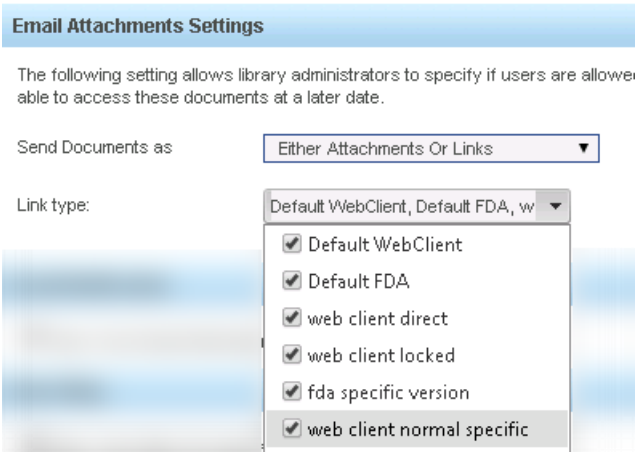
For the FDA and Web Portal, only the normal mode is available.



The document links can be made visible to all users or to just the administrators in the metadata pane. If the links are made visible to all users, then the link “All URLS” is shown in the version properties. When clicked, the specific URLs are shown.



The available link types for emails are set in the Email Attachments Settings area. Library administrators can determine which link types can be sent in an email.



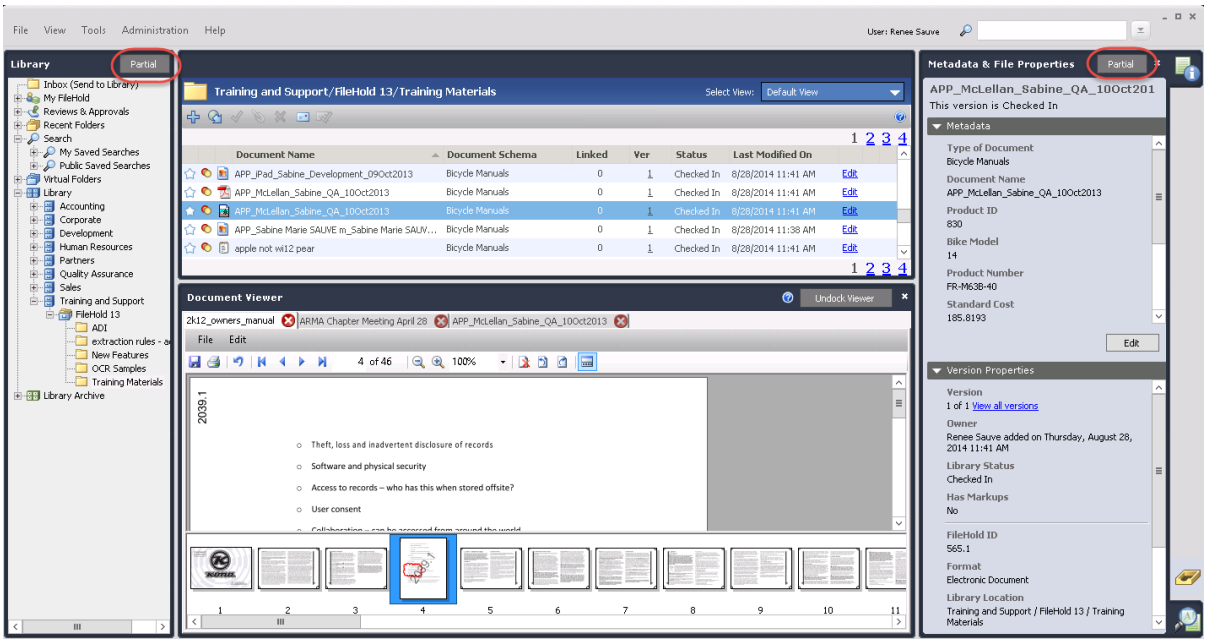
11. VIEWER ENHANCEMENTS

Several new enhancements have been added for the FileHold Desktop Application (FDA) viewers.

11.1. FDA User Interface Change

The interface of the FileHold Desktop Application (FDA) can be modified to accommodate seeing more information in the library tree and metadata pane when the viewer is in use.

Both the library tree and the metadata pane can be set to “full” or “partial’ view mode when the viewer is open. Full mode extends the panes to the bottom of the screen where partial mode decreases the pane size to the same level as the viewer pane. This full mode feature allows users to look at more information in these areas while still viewing a document.

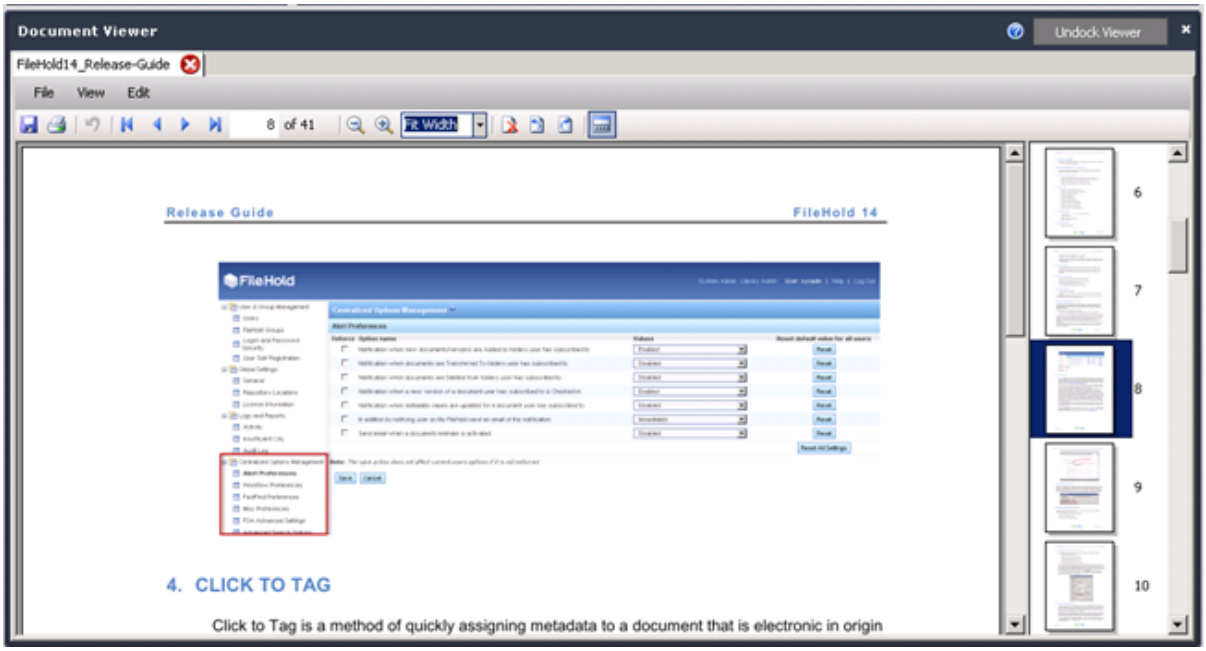


The FDA with the library tree and metadata pane in “full” mode with the viewer

11.2. PDF/Image Viewer Enhancements

Several new enhancements have been made to the PDF/Image viewer:

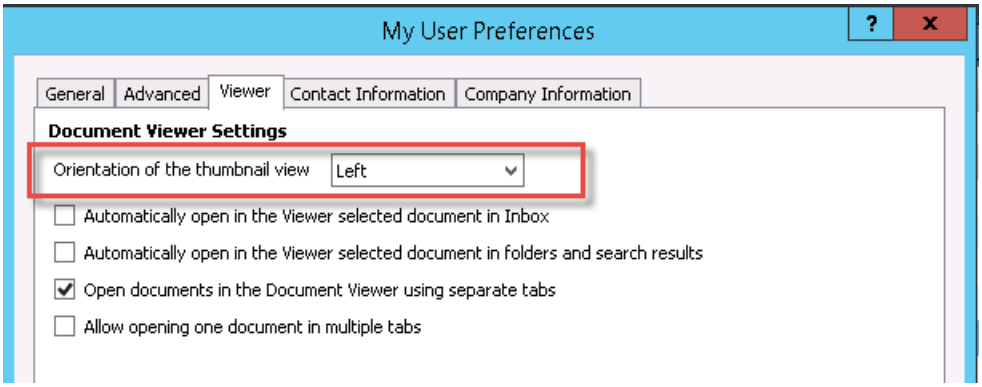
- Thumbnails are displayed even for one page documents.
- The thumbnail pane can be expanded or collapsed using a button on the toolbar.
- The orientation of the thumbnail pane can be set to the top, bottom, left or right side of the viewer pane. The orientation of the pane is set in the User Preferences > Viewer tab.
- You can now insert pages for PDF and TIFF files. Pages can also be dragged and dropped between documents of the same format if the option to open documents in separate tabs is enabled.
- Pages can be rotated 90 degrees clockwise or counter-clockwise.
- The size of the image can be set to a fixed zoom level. For example, 100%, 150%, page width and so on.

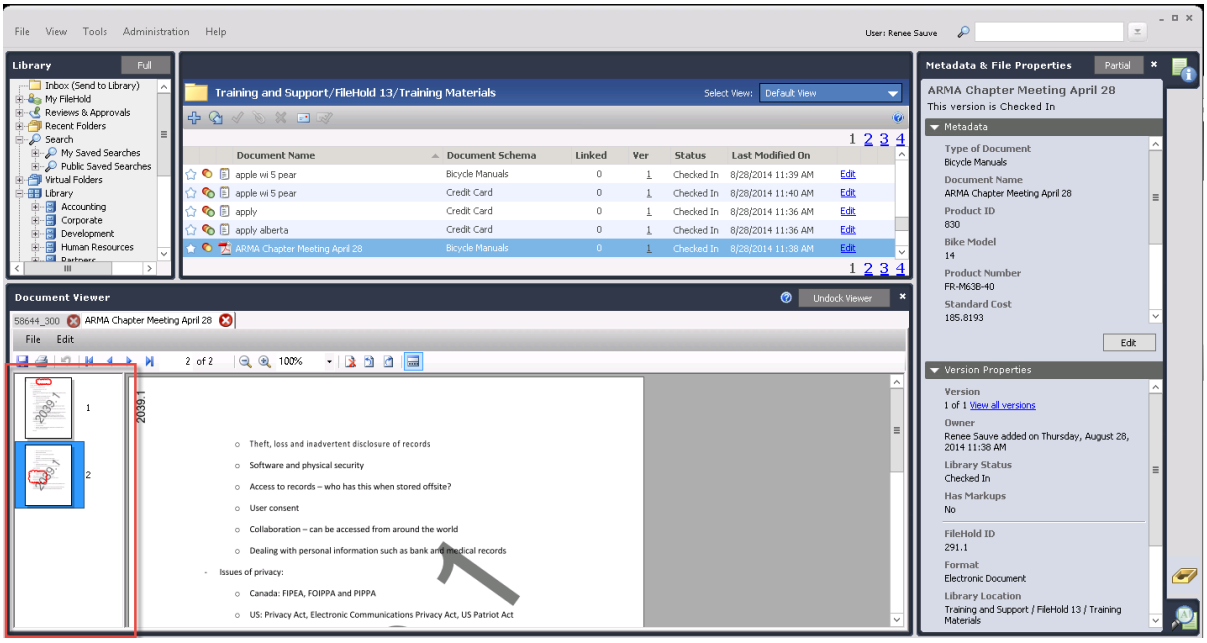


11.3. User Preferences – Viewer Tab

The preferences for the viewer have been moved from the Advanced tab to a new Viewer tab in the User Preferences area.

A new setting “Orientation of the thumbnail view” has been added. This allows the user to determine where they would like the thumbnail pane in the PDF/Image viewer to be situated. The available options are top, bottom, left, or right.





PDF/Image viewer with orientation of thumbnail pane set to left

11.4. Context Menu Label Change

When right-clicking on a document to open in the viewer, the menu labels have been modified:

- Open in Brava Viewer – Opens the document in the third party Brava Viewer that is integrated with the FDA. In previous versions, the label was “Open in Document Viewer”.
- Open in PDF/Image Viewer – Opens the document in the FileHold PDF/Image viewer. In previous versions, the label was “Open to Reorder Pages/Images”.

The available functions are contingent on the viewer license that has been assigned to the user.

12. WORKFLOW ENHANCEMENTS

There are some enhancements in the workflow area.

12.1. Custom Naming Pattern for Workflow Names

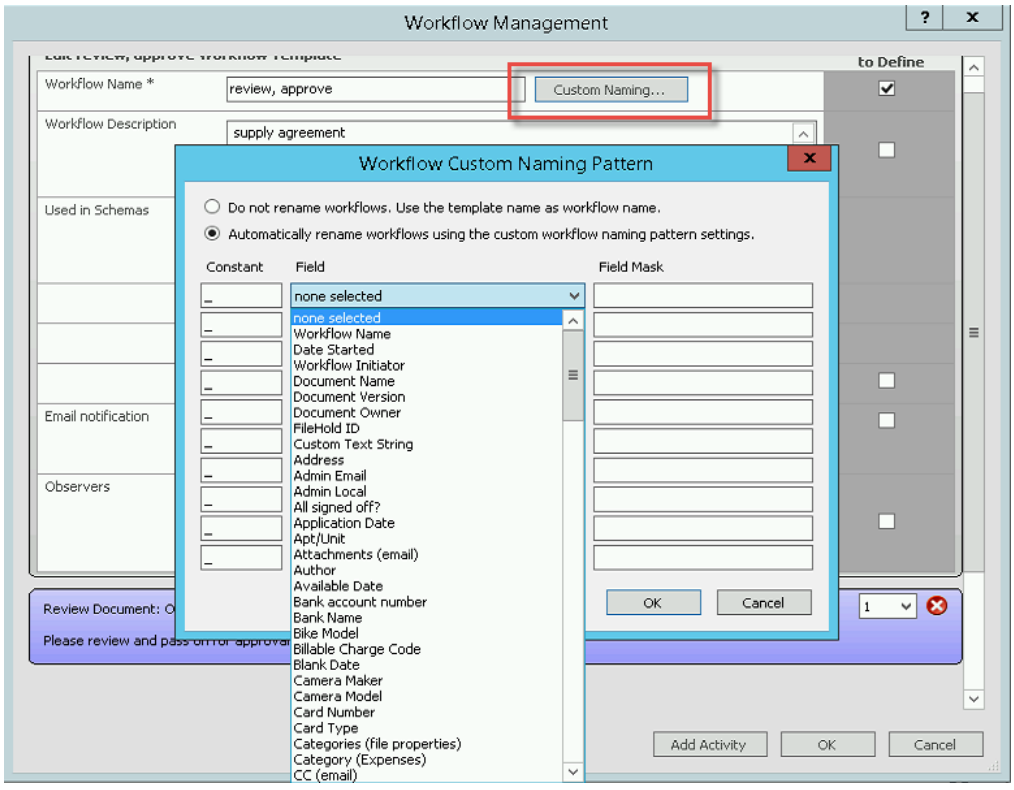
FileHold 14.0 introduced the option for users to name their own workflows. The default name was simply the workflow template name. The custom naming pattern provides the possibility to enhance that default value with many new options. The new custom naming pattern feature in the FileHold 14.2 release allows administrators to define how workflows will be named by default and whether or not to allow end users to edit those default names. The desired workflow names can be unique and easily identifiable in the My Tasks area, workflow status report and email notifications.

In the naming pattern configuration, you can set the workflow name using the workflow template name, date it was started, workflow initiator, document name of the “initial document”, document version, document owner, FileHold ID, a custom text string, and any of the metadata in the system. This feature is similar to the custom naming pattern on a schema.

The document name of the “initial document” can be used as part of the custom workflow naming pattern. For users with only a single document in their workflow this option can be used to emulate the feature of FileHold 12 where the document name was used as the workflow name. The “initial document” is defined by:

- If there is only one document in the workflow
- If there is more than one document in the workflow, then it is the first document selected

The document name of the “initial document” cannot be changed. It is also displayed in the workflow email notifications.

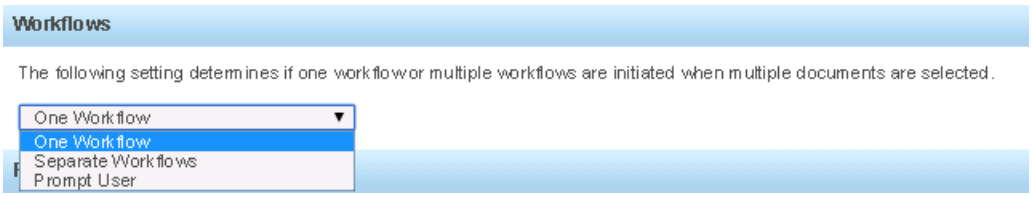


12.2. Initiating Workflows When Multiple Documents are Selected Configuration Option

In FileHold 12, a separate workflow is initiated for each selected document which may result in multiple workflows being initiated. When multiple documents are selected in 14.0 a single workflow is initiated containing multiple documents.

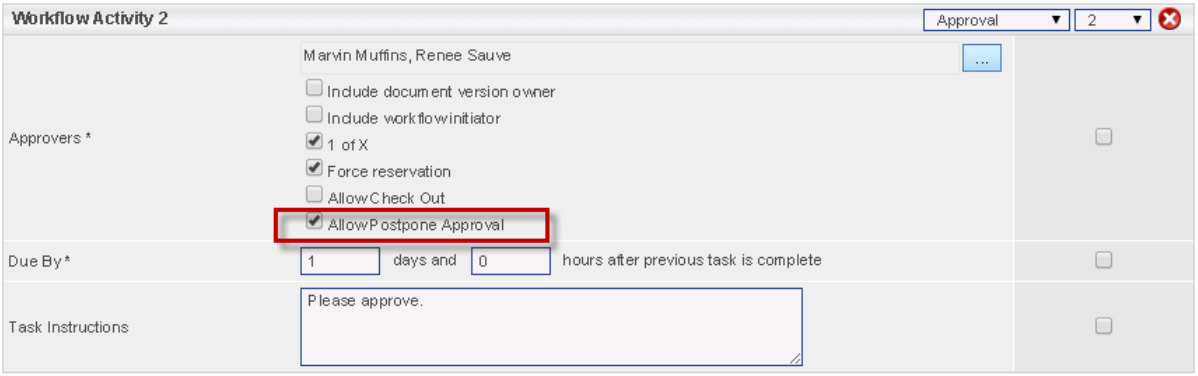
In this release both approaches are possible. There is a setting to configure whether a multiple document workflow or multiple separate workflows will be started if more than one document is selected when a workflow is initiated. There is also an option which prompts the user each time a workflow is initiated on multiple documents.

The setting can be configured in Administration Panel > Library Configuration > General.

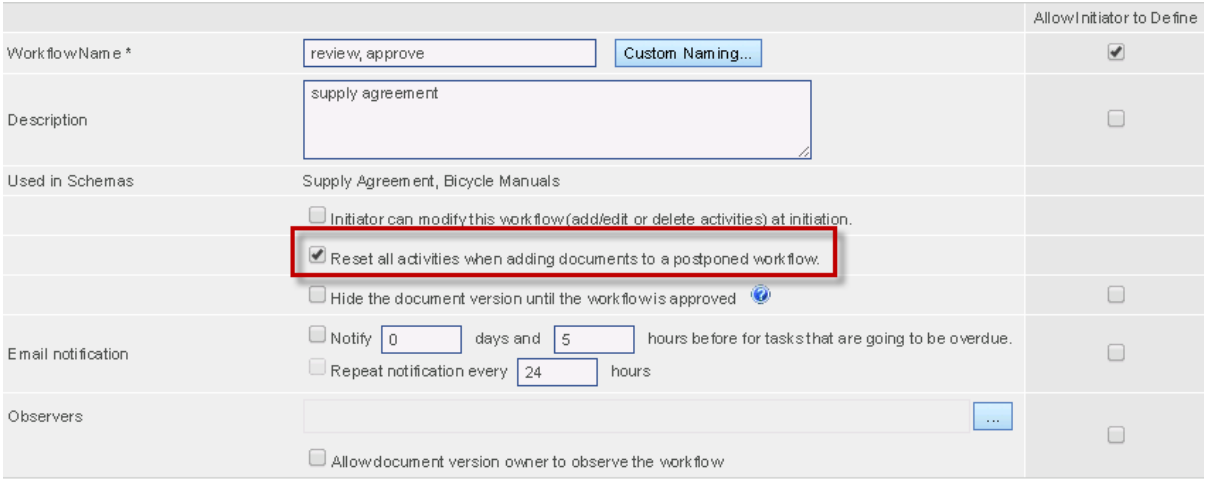


12.3. "Approval Postponed" Enhancements

In the 14.0 release of FileHold, a new option "Approval Postponed" was introduced when approving documents. In this release, it is a setting that can be enabled in the workflow template. If it is enabled, the "approval postponed" option will be available to the approvers.



Documents can now be added to a workflow that has been marked as "approval postponed". However, if a workflow that has been postponed is restarted and a "main document" is added to the workflow, you can define on the workflow template if all the activities should restart from Activity #1. This allows all of the main documents including the new main document to go through the entire workflow process once again. If the option is not enabled on the template then the workflow is restarted from the activity from which the approval was postponed.

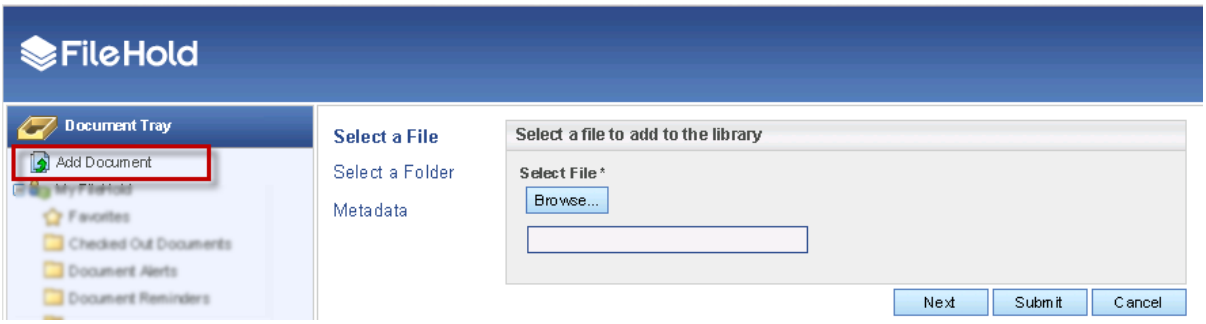


NOTE: If you are upgrading and there were workflows in progress then the Approval Postponed option will not be available when approving a document. You will need to enable the option in the workflow template in order to use this option for future workflows.

13. WEB CLIENT ADD DOCUMENT WIZARD

In previous versions of FileHold, adding documents via the Web Client was done directly from a folder location. In this release, there is an Add Document wizard that allows you to select the document, set the schema and metadata, and destination folder without the need of being in a folder. Auto-filing can also be employed in the wizard.

The Add Document wizard can be integrated with other applications in a similar way to WebCap. The calling application can prefix various parameters and choose to display the locked down interface.

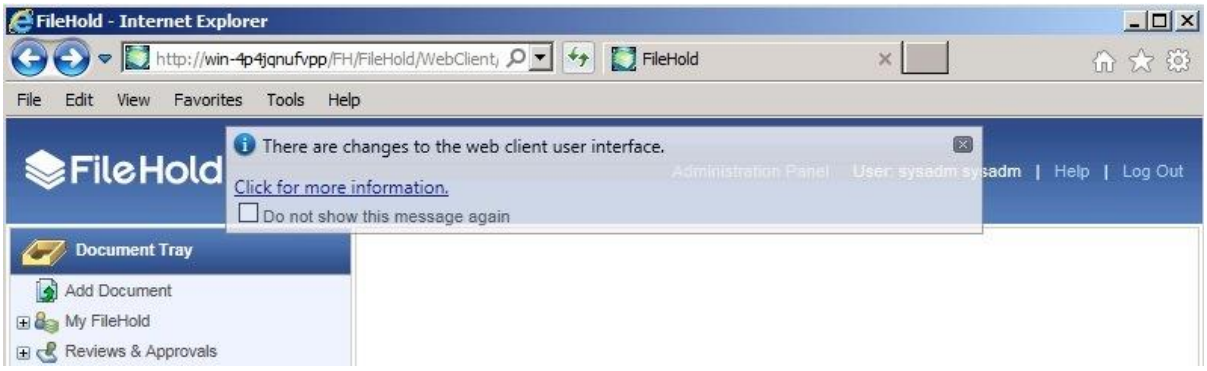


14. MINOR MISCELLANEOUS IMPROVEMENTS

The following are a number of improvements that were added to the FileHold 14.2 release.

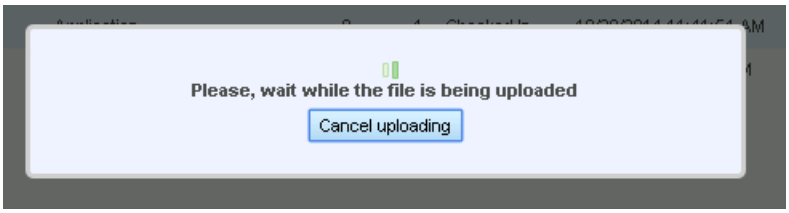
14.1. Web Client New Feature Introduction Message

When FileHold is upgraded to this release, a message box will appear in the Web Client that lets the user know that changes have been made to the interface. The user can click on the provided link to be taken to a page on the FileHold website. This message can be turned off.

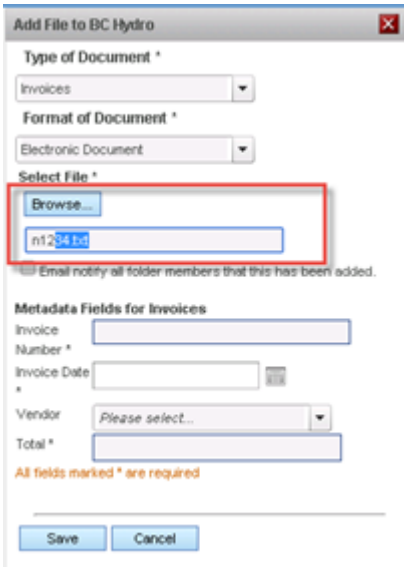


14.2. Uploading Files from the Web Client

When documents are added directly to a folder or through the Add Document Wizard, the upload can be canceled by clicking Cancel Uploading.



The document name can be modified in the metadata pane without losing any metadata field values.



14.3. Improved FDA Performance

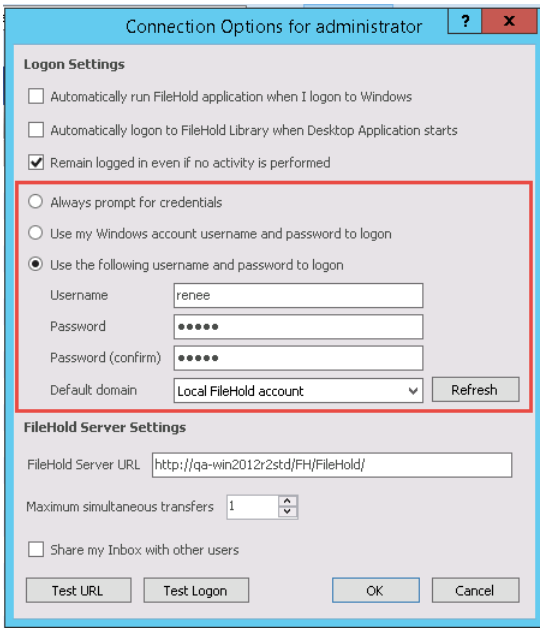
Improvements have been made in the performance of file transfers for FileHold Desktop Application that includes the uploading and downloading of documents. Depending on the size of the document and performance of the server this improvement could be 2 to 3 times faster than the previous version. The total file size should not exceed the limits of the IIS server. Typically this will limit the size to be no greater than 2GB. Users will receive a warning message if they attempt to upload a file larger than this.

14.4. Web Browser Time-Outs

When a web session times out, the user will be taken to their last screen after logging back in.

14.5. FastFind

If a user is disconnected from the FileHold Desktop Application (FDA) due to the inactivity timeout, FastFind will now remain enabled. If a FastFind shortcut key is used while the user is logged out, then they will be logged back into the FDA according to the settings in the Connection Options window.



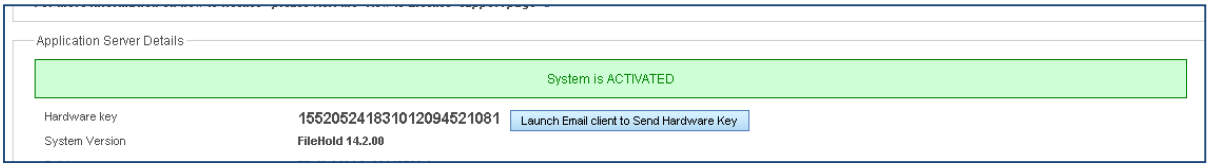
14.6. Views

The following columns can now be added to the all the customizable views:

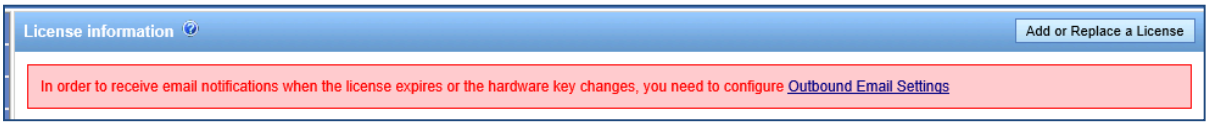
- Checked out by
- Last edited on

14.7. Licensing Page

The licensing page now displays where the system is activated or deactivated in a large green or red bar near the top of the page. The licensing page is now available in the Administration Panel > System Management > License Information.



The outbound email settings allow administrators to use the “Launch email client to send hardware key” button. If the outbound email settings have not been configured, a link to configure the settings is now available in the licensing page.



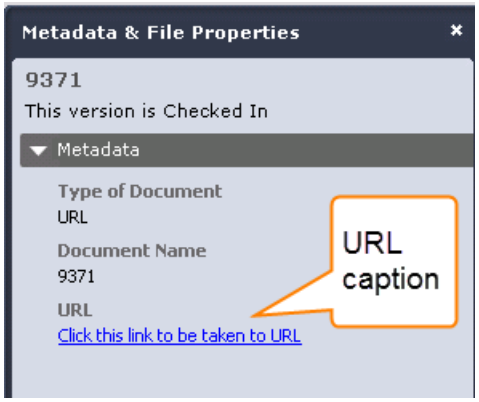
14.8. FileHold Desktop Application Shortcut Keys

New shortcut keyboard commands have been added for the FileHold Desktop Application (FDA).

Shortcut Key	Description
CTRL + Shift + L	Logs a user in if logged out or logs a user out if logged in.
CTRL + Shift + V	Opens the document viewer.
CTRL + Shift + R	Opens the report viewer.
CTRL + Shift + O	Adds an offline document
ALT + L	Performs a database lookup. Can only be used when the metadata panel is in edit mode and the Lookup button is available.
ALT + S	Saves metadata values in the metadata pane. Can only be used when the metadata panel is in edit mode.
Alt + N	Saves the metadata values and moves to the next document in the list (Save and Next). Can only be used when the metadata panel is in edit mode.
Alt + T	Invokes Click To Tag when in the metadata panel.

14.9. URL Type Metadata Field Caption

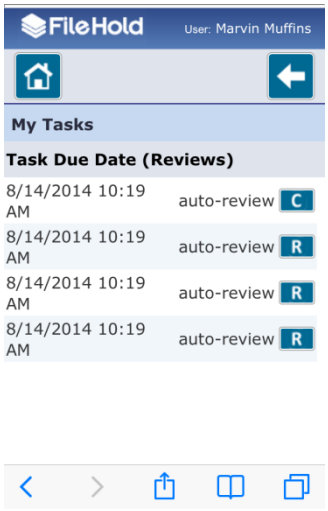
A caption can now be entered for an URL type metadata field. When defined, the caption is displayed in the metadata pane instead of the URL address. If the caption is not defined in the metadata field, the URL is displayed.



14.10. Mobile FileHold

Documents can now be added that use a database lookup on the schema. Once a file is selected and the lookup value entered, a Lookup button is available. Once tapped, the remaining metadata field values are populated.

Workflow tasks can now be reserved or unreserved through the mobile client. An “R” button is available to reserve a task in the My Tasks screen. To cancel the reservation, tap the “C” button.



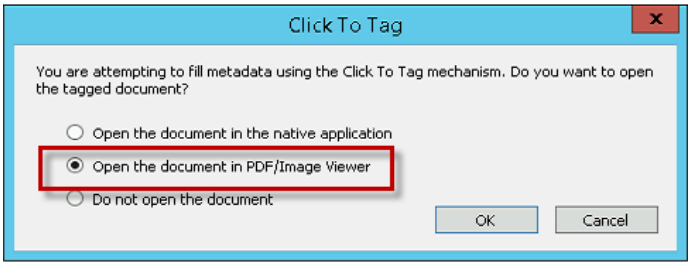
14.11. Emailing Documents from the Web Client

Documents are now emailed from the email address that the user is logged into the Web Client with. In previous versions, the “from” email address used was the one set in the FileHold outbound email account settings. This allows people to reply directly to the sender of the email.

14.12. Click-to-Tag (Beta)

If the selected text is not recognized when clicked or rubber banded, and if the metadata field is a type of date, currency, or drop down list, then a prompt appears asking you to correct the selected text. Once the correct value is entered, it is validated and entered into the metadata field.

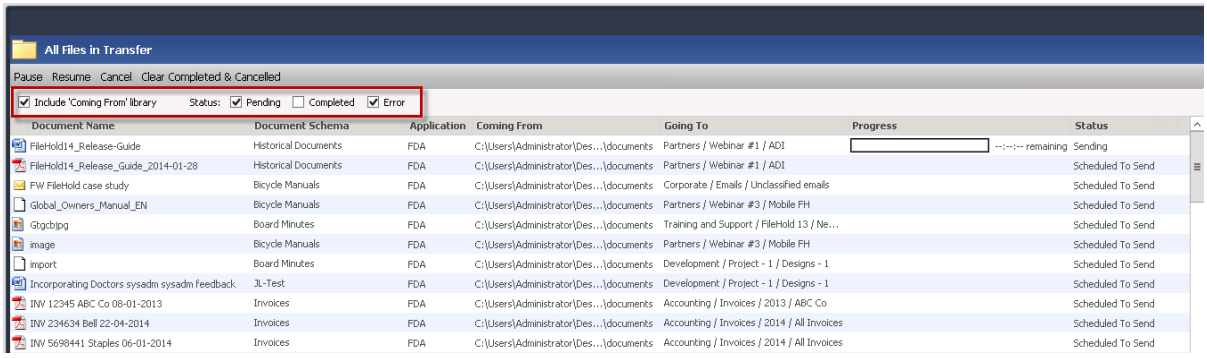
When using Click-to-Tag to tag a document, the PDF/Image viewer is now an option in the message prompt.



14.13. Viewing All Files in Transfer

The All Files in Transfer window now includes the following filter options:

- Include “Coming From” library – When enabled, all documents being sent to the library and downloaded from the library are shown. If disabled, only the documents that are or will be sent to the library are shown.
- Status:
    - Pending – Shows all documents that pending to be sent to the library with a status of “Scheduled to Send” when enabled.
    - Completed – Shows all documents that have been sent successfully into the library with a status of “Completed” when enabled.
    - Error – Shows any errors that occurred while sending documents into the library with the status of “Failed” when enabled. TIP: Hover over the “Failed” status to see why the document failed to be sent to the library.



15. RESOLVED ISSUES

ID	Title
5564	(Web Client) Documents are downloaded using the octet stream mime type. This disables a file download option in Firefox browsers. The new direct download links or the Web Viewer option will cause the download to use a mime type that matches the document extension.
6579	(Web Client) Empty saved search does not display correct result when user changes criterion in a specific scenario
6601	There is no warning message about missing IIS when installing FileHold server on a custom web site.
6657	(OCR) The maximum number of documents that can be OCR'd can now be modified in the Library Manager web.config file under the setting OcrTotalOfExistingDocuments.
6664	(FDA) Unexpected error thrown when exporting a document to a local directory where its filename & destination path would exceed the Windows maximum of 260 characters. An informational message is now displayed.
6701	(Web Client) 'Path to the selected file' is being cleared upon clicking on the Lookup button in the Metadata panel when trying to add a file.
6706	(Web Client) Starting a quick search where the search value is the document type will have the initial value set according to the value when the search was created.
6707	(Web Client) Quick search results are cleared after initiating a workflow when the workflow is initiated from the quick search results.
6733	It is possible to change cabinet or folder permissions for a disabled user. This can cause future permission problems if the user is re-enabled. It is a best practice to assign permissions only to a group. Permission changes on a disabled user are now forbidden.
6734	'Archive Cabinet/Folder' context menu option was only available to 'System Administrators'. Now available for Senior Library administrations, and Library and Cabinet Administrators where they are owners of the cabinet.
6744	PDF documents cannot be printed using Print-to-FileHold. The output will be garbled.
6813	Users no longer receive notification for own action if alert is set on folder or document
6850	(Web Client) Library admin workflow status report filter settings are not maintained after the report is run.
6852	(FDA) F5 (refresh) does not refresh the workflow status report view
6865	(FDA) Lookup parameter type cleared for custom queries.
6866	(FDA) No way to select "lookup using" value on a custom query when creating a look up with a custom query.
6867	(Web Client) "Verify Query" must be pressed twice to get list of columns when creating a look up with a custom query in the web client
6882	(FDA) The auto-tagging tab at cabinet and folder levels is difficult to read when the desktop resolution is set higher than 100%.
6993	Click2Tag automatically closes when tagging process is completed.
7014	When attempting to delegate a task to a user that does not have permissions to the document, the warning message that displays states the incorrect workflow template name.

ID	Title
7023	(FDA) If the installer is run when the same version of the FileHold Desktop Application is already installed on the PC, the user is prompted to remove the current FDA installation. The FDA will need to be installed again after removal.
7024	(FDA) Cannot delegate a task to self when assigned to another user.
7031	(Workflow) Email notifications FDA links brought user to wrong screen in FDA.
7065	(Workflow) When a schema is configured to “hide the document until approved” is enabled and a document is checked out during the workflow process, the document remains hidden even after it has been approved.
7073	(FOC) For Microsoft Outlook 2003 and 2007, the integration buttons (Add, Check in, Send Review/Approval) are disabled even when logged into the FDA.
7099	(Mobile Web Client) The method of downloading documents was changed from “octet stream” to “mime type”.
7206	(Workflow) Email notifications for completed tasks contain a link to the task instead of the workflow status report.
7349	(Workflow) Slow response while generating the end user workflow status report.
7467	(Guest Portal) Cannot view metadata and file properties pane when logged in as a guest user.
7471	(FDA) Cannot use the PDF/Image or Brava viewer in the My Workflow Tasks area.
7502	(FDA) Exception thrown when viewing the review and approval history from Show Documents pane.
7503	Changing the folder owner using the Change Cabinet/Folder Owner utility removes auto-tagging set up on the folder.

16. KNOWN ISSUES

ID	Title
5084	FileHold Office Client issue related to an Microsoft Excel Object embedded on a Word document. This is a known Microsoft issue: http://social.msdn.microsoft.com/Forums/en-US/vsto/thread/0854a0f0-cf7f-4837-9471-82de3fa63177/
6008	When a date format is set to 'yyyy-MM' the date can by entered directly without the hyphen, but the value is ambiguous and may be interpreted correctly.
6087	Issue when performing a Search involving 'In the List' operator with multi-select enabled and a comma (,) in the value (such as Last Name, First Name). Use the equals (=) wildcard in place of the comma.
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	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.

ID	Title
7135	(Mobile Web Client) A number type metadata field does not display an error icon when typing text into the field in iOS 7.
7357	(Web Client) Cannot save a drop down metadata field that has commas in the values and has “Allow multiple selection” enabled.
7359	(FDA) If changing an electronic document or record with a custom naming pattern, the custom naming pattern is not applied after the name change.
7363	(Web Client) In a date type metadata field, the “Today” button does not populate the value with today’s date.
7371	(Workflow) Cannot delegate a task when a schema is configured to “hide the document until approved” is enabled and is not an original member of any of the workflow activities but has permissions to the document.
7377	Advanced searches for “FileHold Id” and is “in the list” fails when comma used to separate values.
7389	You are able to add a user to a group to which the user already belongs when there are more than 30 FileHold groups (or more than one page of groups displayed).
7397	(FOC) Microsoft Excel integration with CSV files does not work when trying to check in a new version of a document.
7398	(FDA) Exception thrown when trying to export email messages with a blank subject line when using the Outlook Watched Folder.
7420	Insufficient permission error is shown when a user attempts to copy or move a file with a read-only field to an auto-tagged folder.
7421	Custom name contains “EmptyCustomName#” when metadata field used in custom name is blank in select circumstances.