FileHold

Document & Record Lifecycle Software

CONTENTS

1. FILEHOLD 14 OVERVIEW

This document is a high level description of the new features and enhancements of FileHold 14. The previous release was FileHold 12.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 14

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

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

2.3. Web Browser Support

- Internet Explorer 7.x , 8.x, 9.x and 10.x (32 bit and 64 bit)
- Mozilla FireFox 25.x+
- Safari 5.1 (tested on Windows only)
- Google Chrome 15.x+

2.4. FDA Operating System

- Windows XP SP3 (32 bit)

- Windows Vista SP2 (32 bit and 64 bit) – Top 3 editions

- 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)

2.6. Microsoft SharePoint Support

- Microsoft Office SharePoint Server 2007 (32 bit and 64 bit)

- Microsoft Windows SharePoint Services 3.0 (32 bit and 64 bit)

- Microsoft Office SharePoint Server 2010 (64 bit)

- WSS 4.0/Microsoft SharePoint Foundation 2010 (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.

3. CENTRALIZED MANAGEMENT OPTIONS

The Centralized Options Management area allows System Administrators to globally manage alert preferences, workflow preferences, FastFind preferences, FDA advanced settings, advanced search settings and other miscellaneous preferences for all users of the document management system.

When the options are set globally by the administrator:

- They can be set as the default value and then changed by the end user if desired.

- They can be set and then "enforced" meaning that the end users cannot modify the option.

Administrators can set the default option values and update them at any time. Once the default options are set and saved, they will be pushed out to the end users if the option is enforced or if they have not have been already set by the end user. If end users have their own preferences set, they will not be overwritten upon saving the settings, unless the option is set to enforced.

If any of the options are "enforced", they can be enforced only for anyone who has a lower role than Library Administrators. Library and System Administrators can still modify preferences even if they are enforced.
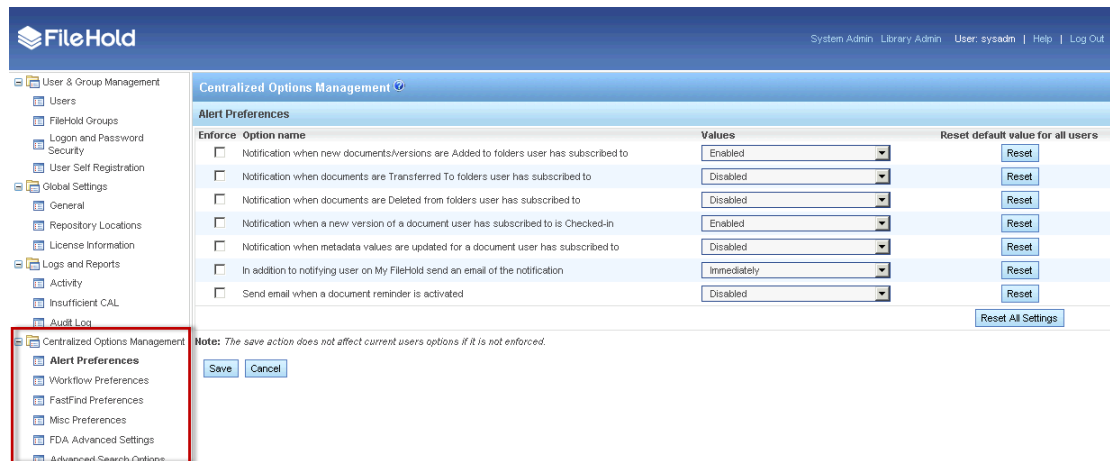
4. CLICK TO TAG (BETA)

Click to Tag (in beta testing) is a method of quickly assigning metadata to a document that is electronic in origin and is being added to the repository using the FileHold Desktop Application. It allows you to "click" or "rubber band" text, numbers, dates, etc. on the screen and inserts the value into the metadata field of the schema. Click to Tag can be enabled in the User Preferences or by an administrator in the Centralized Management Options area.

When using Click to Tag, the mechanism OCR's (optical character recognition) the selected area on the screen. This makes is possible to extract values not just from the document but also from any external application accessible on the user's computer.

When Click to Tag is invoked in the metadata pane, the user is prompted to open the document in the FileHold viewer, the document's native application, or to not to open the document. Once an option to tag the document is selected, the screen is covered with an opaque white mask called the "fold". This indicates that the Click to Tag process is in effect. A tool tip displaying the metadata field name to tag is shown. You can then click or rubber band the value for the metadata field. After the first metadata field is tagged and validated, the next metadata field in the list can be captured. The process is repeated until all the values have been captured. The "fold" can be activated and deactivated at any time during the tagging process in the event that a document needs to be scrolled to other page, zoomed, or tagged from a different screen.

The quality of the documents needs to be reasonably high when using Click to Tag. For this reason, FileHold recommends that *only documents that are electronic in origin* should be used with Click to Tag.

Click to Tag supports only the English language "out of the box". This can be modified in the FDA.exe.config setting `<add key="ClickToTagLanguage" value="eng"/>`. For other language support, contact FileHold Professional Services at sales@filehold.com.
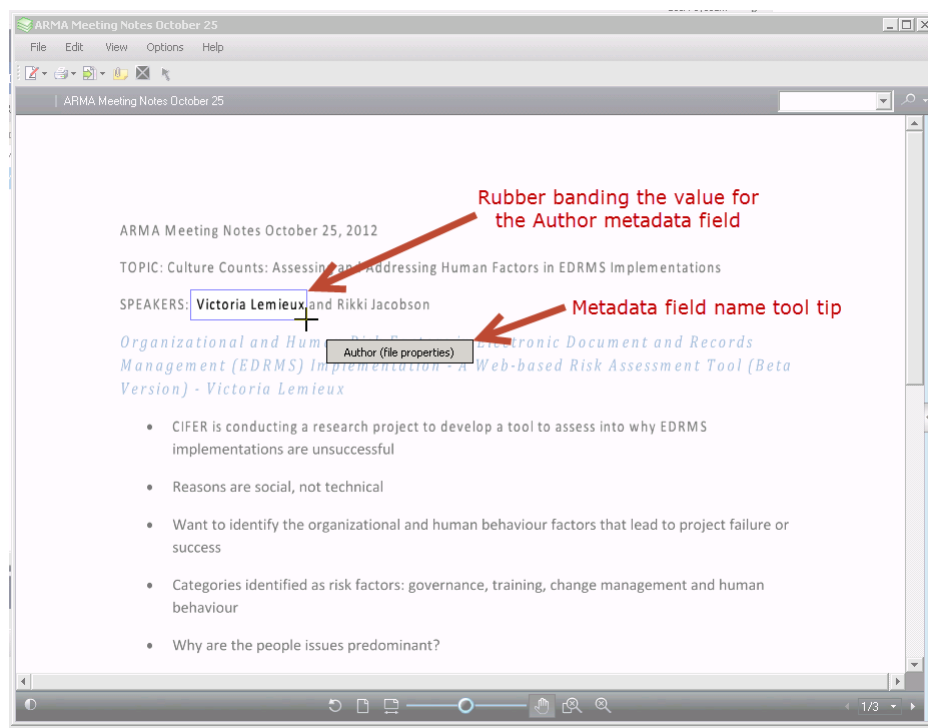
4.1.   FastFind with Screen OCR Search

FastFind is an optional feature that can search third party applications using hotkeys and return the search results in FileHold. A FastFind search can be now be conducted by OCR'ing the screen. Once the shortcut key is invoked (ALT+F is the default), you can click on the text or draw a bounding box (rubber band) around the text. Then a search is performed in FileHold to meet the selected criteria from the screen. This setting is enabled in the FastFind preferences.
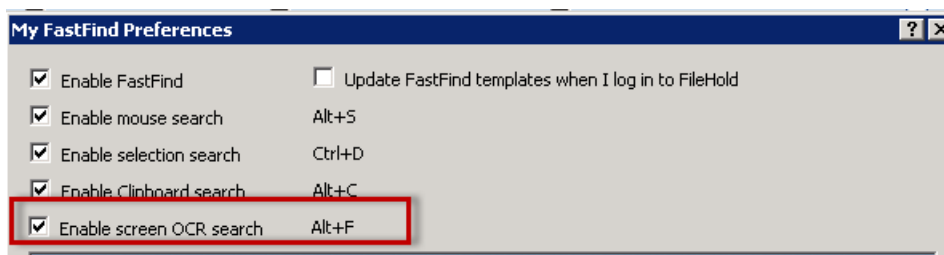
5. DATABASE LOOKUP IMPROVEMENTS

Several enhancements have been made in the area of new data providers for database lookups in various areas of the product:

- Drop-down database lookups metadata fields

- Schema level database lookups

- Manage imports tool database lookups

5.1. Drop-Down Database Lookup Metadata Field

The following data providers are now supported for drop-down metadata field types:

- Microsoft SQL 2005 and 2008

- .Net framework data provider for ODBC

- .Net framework data provider for OLE DB

- .Net framework data provider for Oracle

- .Net framework data provider for SQL Server

When the list retrieved from the database is presented to the user in the drop down list, only the first 100 items will be displayed in the FDA and the first 25 items in the Web Client. As the user scrolls through the list or starting typing the value, more values will be loaded into the view but is limited to viewing 100 (FDA) or 25 (Web Client) values at a time. To change the number of items displayed in the Web Client drop down list, the parameter `<add key="ItemCountPerRequest" value="n"/>` can be added to the web.config file in *C:\Program Files\FileHold Systems\Application Server\WebClient* (Windows Server 2008) where n is the number of drop down list items.

5.2. Database Lookup on the Schema

A new Lookup tab in the schema properties allows you to retrieve database information into additional metadata fields of a schema based on the value entered into the mapped metadata field value. Once the user enters a value for the metadata field that is used as the "look up" value, a query can be executed on an external database to retrieve additional values that are mapped to the other metadata fields in the schema.

This mechanism does not require any synchronizing with the FileHold database because it is derived directly from the external database. The look up is performed on the FileHold server in order to provide more security as the connection is made using the FH Service account.

Only one database lookup is allowed per schema. The lookup can be performed when adding or editing the metadata of a **single document**. You cannot use the lookup when tagging multiple documents.

After performing a lookup, users can still modify any of the retrieved values. The system will not verify if the values match the original data record and it will not update those values when the record is modified in the external database.

When creating metadata fields for the schema that is using database lookups, any type of metadata field can be used (text, number, drop down list) as long as it matches the format of the lookup column. For example, if you have a number type metadata field mapped to a lookup column that uses letters then the lookup functionality will not work. In this case, using a text field for most metadata fields will work best as it accepts any letter or number combination.

The following data providers are supported for schema level lookups:

- Microsoft SQL 2005 and 2008
- .Net framework data provider for ODBC
- .Net framework data provider for OLE DB
- .Net framework data provider for Oracle
- .Net framework data provider for SQL Server

5.3. Managed Imports

In the Managed Imports tool, in the Database Lookups tab, you can now:

- Perform server side lookup of metadata if the schema selected in the Field Mapping tab is a schema that is configured to use database lookup. When importing, the values retrieved from the lookup will override any of the mapped field values from the XML file.

- Perform lookup of metadata from another database. This allows you to configure the database you want to use for the lookups on the client side.

6. MOBILE FILEHOLD

Mobile FileHold allows you to access your documents, add files, and approve and review workflow tasks while on the go.

The officially supported platforms are:

- iOS 6 on iPhone 5 using default Safari browser
- Android Jellybean on Samsung Ace II using default Chrome browser

Mobile FileHold is HTML 5 based; so many other types of devices may work correctly even if they are not officially supported.

In Mobile FileHold you can:

- Add files
- Search for documents which includes simple searches, saved searches, empty searches, and quick searches
- Submit reviews and approvals for workflow tasks
- View metadata and version properties for a document
- Download and view a document through your device's supported application
- Initiate a workflow on a document
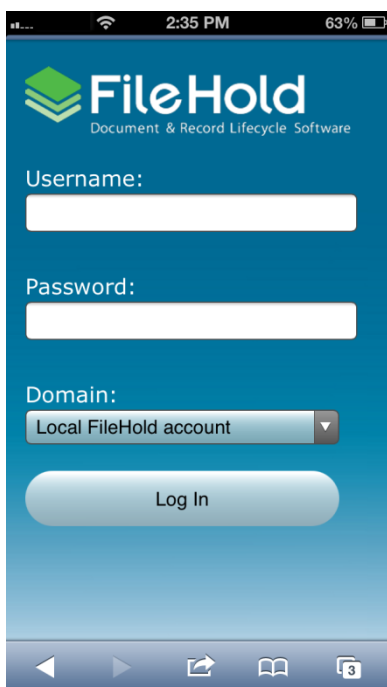
7. OUTLOOK WATCHED FOLDER

The new Microsoft Outlook 'watched folder' allows you to add any emails into the "watched folder" in Outlook so that the emails are brought into a folder on the local computer or network location. Then in FileHold, a watched folder or managed import set up in the FileHold Desktop Application (FDA) automatically brings the emails into system for processing.

Special email rules can be set up in Outlook to ensure the correct emails are being moved into the document management system. You can also drag and drop emails into the watched folder. Once an email has been sent into the document management system, it can never be imported again.

8. LICENSING IMPROVEMENTS
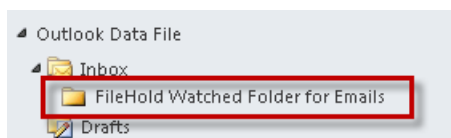
There are some new licensing improvements in FileHold 14.

8.1. License Expiration Grace Period

When a license expires or the hardware key is changed and does not match, an email entitled "*Attention Required: Your FileHold License has Expired*" will be sent automatically to the email addresses of the System Administrators of FileHold. The content of the email includes the when the 7 day grace period ends. The system continues to work normally until the grace period expires.

Once the grace period expires, the system becomes deactivated unless a new license key is uploaded. If you receive the email, use the License Request procedure below to get a new license key.

If you experience a lot of hardware key changes and run a virtual machine environment that is set to automatically recover from hardware failures, please contact FileHold support.

8.2.   License Requests – Sending the Hardware Key

If you need a new hardware key, there is a new functionality on the License Information page in the Web Client that allows you to send a new license request to FileHold with the system version, build number, and hardware key in the body of the email.

Once clicked, the email will open up in the default email application and addressed to licensing@filehold.com.

System information ⓘ

How to request a new or replacement licence

1. Copy hardware key from below into the text of an email message
2. Attach a screenshot of this licensing page
3. Write a short note with your contact details, organization page
4. Send email to licensing@filehold.com

For more information on how to license - please visit the how to license support page ⓘ

System Details

Is system activated	**True**
System Version	FileHold 13.00.00
Build	FileHold13_20130904.1
Hardware key	15520524183101209452108
Machine name	QA-ENT2008R2
Domain name	DC2008.QA

[Launch Email to Send Hardware Key]

9. PDF FORMS EXTRACTION

There is a new extraction rule in the document management system that allows the values entered into the fields of a PDF form to be automatically extracted into the metadata fields of a schema.

PDF forms contain fields which users can fill out using the free Adobe Acrobat Reader software. In order to create PDF forms, you will need software such as Adobe Acrobat Professional. You cannot create PDF forms using the document management software.

The PDF form extraction rule is created in the FileHold Desktop Application (FDA). The rule is based on the PDF form template used. Multiple PDF extraction rules can exist. This means that you can have as many PDF form extraction rules as needed. Both "classic" and Adobe XML Forms Architecture (XFA) are supported.

The metadata is extracted automatically when the first version of the form is added to the document management system. In subsequent versions, the metadata will need to be updated manually.

10. SEARCH IMPROVEMENTS

The following enhancements have been made to the search functionality.

10.1. Empty Templates for Saved Searches

When an advanced search is saved, the search values can be left empty. This will force the user to enter the search values and click Search once the saved search is selected. This differs from regular saved searches which stores the search values in the template and runs the query automatically.

Empty saved search templates can be made private or public.

10.2. Quick Searches

Quick searches are a new type of saved search that allows you to leave a single variable in the advanced search template empty. When a user runs a quick search, they are required to enter the search term for the empty variable that was set up in the template. The search results that are returned meet the advanced search terms plus the quick search term that the user entered.

Quick searches are useful for conducting searches in Mobile FileHold. Quick searches can be made private or public.
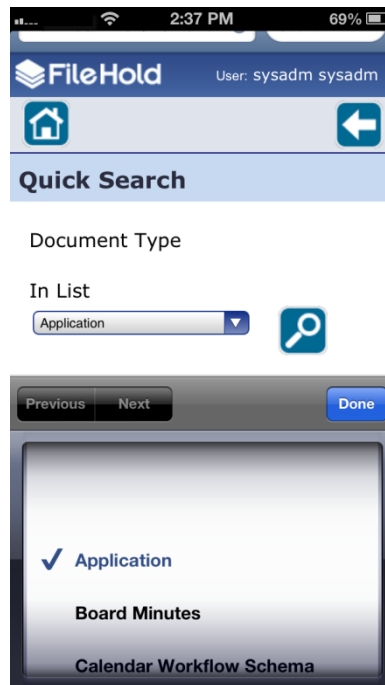
10.3. Proximity Searching

Proximity searching finds a word or phrase within "n" words of another word or phrase. Use the W/N connector in a search request to specify that one word or phrase must occur within N words of the other. For example, *apple pie w/38 peach cobbler* will find all documents that have peach cobbler within 38 words of apple pie.

Similarly, you can also use the NOT W/ ("not within") operator to search for a word or phrase not in association with another word or phrase. For example: *apple NOT w/20 pear*. Unlike the W/ operator, NOT W/ is not symmetrical. That is, *apple NOT w/20 pear* is not the same as *pear NOT w/20 apple*. In the *apple NOT w/20 pear* request, it searches for apple and excludes cases where apple is too close to pear. In the *pear NOT w/20 apple* request, it searches for pear and excludes cases where pear is too close to apple.

The xfirstword term is useful if you want to limit a search to the beginning of a file. For example, *apple w/10 xfirstword* would search for apple within 10 words of the beginning of a document.
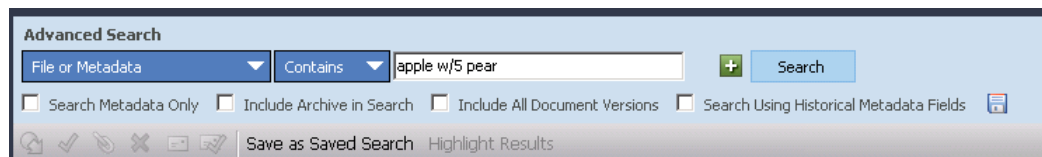
10.4. New Operators and Boolean searches

A "boolean" search request consists of a group of words, phrases, or macros linked by connectors such as AND and OR that indicate the relationship between them. The following Boolean search requests can be made:

Search Request	Meaning
apple AND pear	Both words must be present.

| apple OR pear	Either word can be present.
apple w/5 pear	Apple must occur within 5 words of pear. See [Proximity Searching]().
apple NOT w/12 pear	Apple must occur, but not within 12 words of pear. See [Proximity Searching]().
apple AND NOT pear	Only apple must be present.
apple w/5 xfirstword	Apple must occur in the first five words. See [Proximity Searching]().

The following operators and logics including stemming, fuzzy, synonym and phonic can be used with full text search.

Character	Meaning	Examples
?	Matches any character.	appl? would match apply and apple but not apples
=	Matches any single digit.	N=== would match N123 but not N1234 or Nabc
*	Matches any number of characters. Use to search for a term where the spelling is in question or there are multiple possible spellings. Note: Use of the * wildcard character near the beginning of a word will slow searches somewhat.	appl* would match apple, application, etc. *cipl* would match principle, participle, etc. ap*ed would match applied, approved, etc.
%	Fuzzy search. The number of % characters you add determines the number of differences the search engine will ignore when searching for a word. The position of the % characters determines how many letters at the start of the word have to match exactly.	ba%nana: Word must begin with ba and have at most one difference between it and banana. b%%anana: Word must begin with b and have at most two differences between it and banana.
#	Phonic search. Phonic searching looks for a word that sounds like the word you are searching for and begins with the same letter.	Put a # in front of the word in your search request. Example: #smith will also find Smithe and Smythe.
~	Stemming. Stemming extends a search to cover grammatical variations on a word.	Add a ~ at the end of words that you want stemmed in a search. Example: apply~ also finds applying, applies, and applied. A search for fish would also find fishing.

&	Synonym search. Synonym searching finds synonyms of a word that you include in a search request.	Put a & at the end of the words you want to use in your search request. A search for *fast&* would also find quickly.

10.5. Saving Advanced Search Settings in Web Client

You can save any of the advanced search setting check boxes in the Web Client. Previously this feature was only available in the FDA.
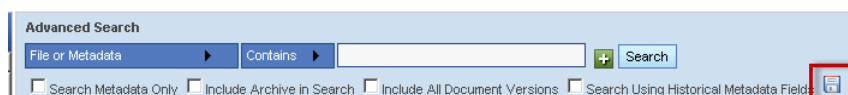
10.6. Excluding File Types from Full-text Search

The FileHold server administrator can define if certain file types should be excluded from the full-text search. Certain file types such as zip, rar, and database files can be quite large and cause performance issues on the server and therefore, should be excluded.

The file name and metadata for these file types are still indexed and searchable; only the contents of the file are omitted from the indexing.

The web.config file to be modified can be found in C:\Program Files\FileHold Systems\Application Server\FullTextSearch (Windows Server 2008). Modify the following section in the web.config file:

```
<add key="FilteredFileTypes" value="" />
```

Where the list of file extensions that should be excluded in the search has a dot (.) in front of the extension and the extensions are separated with a semi-colon (;). For example:

```
<add key="FilteredFileTypes" value=".zip;.mdb;.rar" />
```

11. USER DEFINED EVENTS

Users can now be notified via email and alerts of specific date based events. For example, policies must be updated or reinstated at least once every three years. The policy team would like to review the documents 60 days before the three year anniversary. The event can be set up so that every three years, the owner of the policy will be notified 60 days prior to the policy expiry date.

User defined events are created in the Events area and then applied to the schema. Email notifications and/or document alerts (in the Document Alerts area in My FileHold) can be selected as the notification types. Events can be recurring, for example, every 3 years.

Unlike the other event types (convert to record, archive, and delete), if a custom metadata date is used, it does not have to be "read only" in the schema. A web config setting can determine how many user defined events that can be enabled per schema. The default number of events is 5.

User defined events can be seen in the Calendar upon clicking **Include Events**.
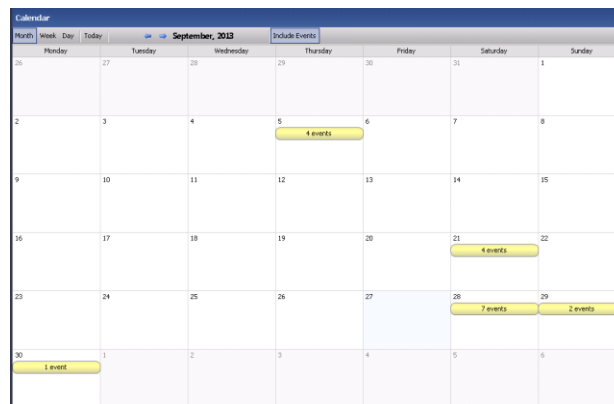
12. WORKFLOW IMPROVEMENTS

A significant number of workflow enhancements were made to the FileHold 14 release. The workflow feature of FileHold is an optional feature. Contact sales@filehold.com if you are interested in purchasing the workflow module.

NOTICE: If are upgrading from a previous version of FileHold, the new workflow functionality is not available to any existing workflows in progress such as restarting, renaming, postponing approval, and so on. You will need to complete the current workflows using the features that were available in the previous version. Once you are upgraded to FileHold 14 and new workflows are initiated, these new features will be available for use.

12.1. Automatically Starting a Workflow Based on Schema

Workflows can be started automatically based on the document type when they are added to the system or a new version of a document is checked in. A workflow cannot be initiated when only metadata is edited.

Since the workflow is triggered automatically, you cannot use an ad-hoc workflow template. You will need to create a defined workflow template to use with this feature.

This differs from the previously release where only one specific document schema and workflow template could be used to automatically initiate a workflow using a server plug-in.
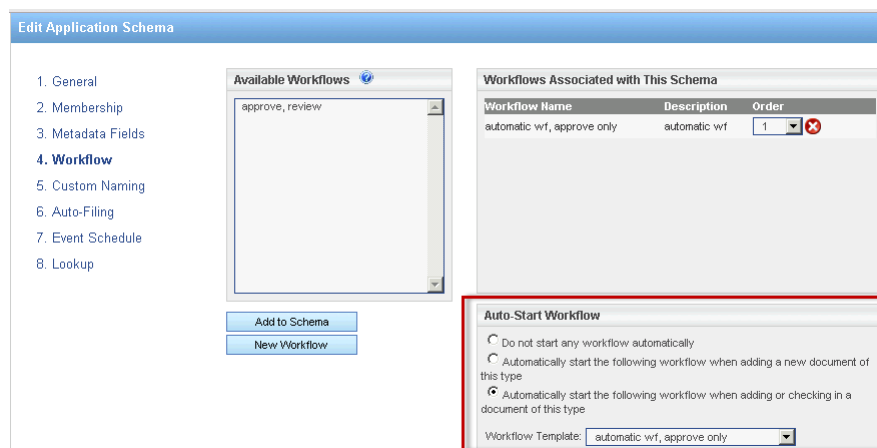
12.2. Workflow Notification Emails

New and improved workflow notification emails are a part of the release. The emails are now easier to read, contain additional information about the workflow or task, and are colour coded.

Additional workflow emails will be sent for the new workflow features. They include emails for:

- An activity is completed for a document I own.

- A document associated with a task assigned to me is added or removed

- A document associated with a task assigned to me is checked out or checked in

- A task assigned to me has been reserved by another participant.

- A task assigned to me is restarted

- Workflow is restarted for a workflow I initiated

- Workflow is restarted for a workflow I am an observer of

- Document is added or removed from a workflow I initiated

- Document is added or removed from a workflow I am an observer of

Note that the workflow options may be locked down by a system administrator in the Centralized Options Management area.
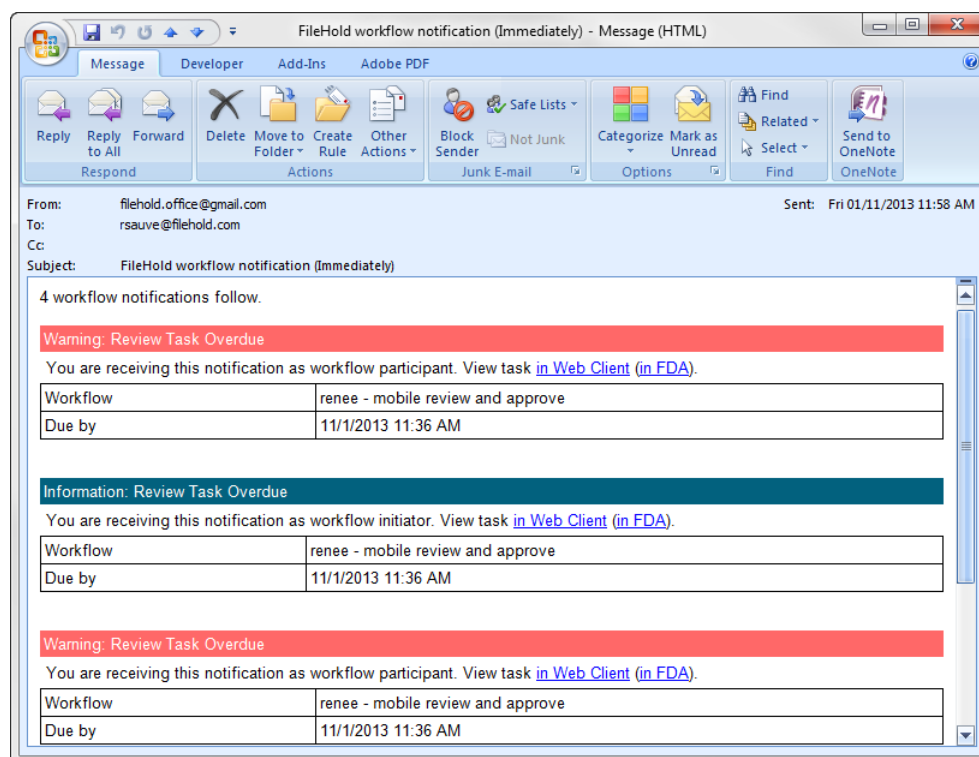

12.3. Graphical Workflow Designer

The FileHold Desktop Application has a new graphical user interface for creating workflow templates. This is not available in the Web Client.

The workflow template can be expanded by clicking on the different sections.

12.4. Workflow Dashboard

The workflow dashboard gives a high level overview of the all the active, completed, cancelled, overdue, and total workflows for all workflow templates in the system. The information is displayed in table and pie chart formats. The dashboard is available only through the Web Client.
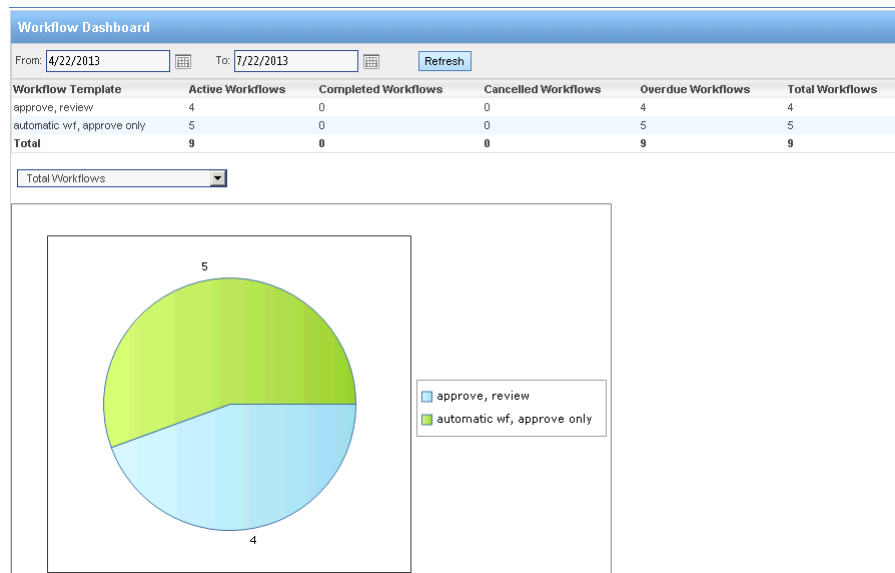
12.5. My Tasks

The My Tasks list has been updated to show the workflow template name in the list instead of the document name. This is because you can now have more than one document in a workflow. See Multiple Document Workflows for more information.

To see the list of documents associated with the workflow, click the **Show Documents** link.

Submit Review and **Submit Approval** buttons have been added to the tool bar in the My Tasks list. You can also view the workflow status report for a single task in the list using the **View Workflows** button.

12.6. Workflow Status Report

The workflow status report has been updated to include future tasks, new statuses, and participant feedback visibility. Instead of the document names being listed, the workflow template name is now shown. This is because you can now have more than one document in a workflow. See Multiple Document Workflows for more information.

To see the list of documents associated with the workflow, click the **Show Documents** link.

When a workflow template is expanded, all activity types, number of main documents (for multiple document workflows), participants, start and due dates, comments, attachments, percent completed, and status is shown. The workflow template can still be seen clicking the **View Details** link.

12.7. Including Version Owners and Initiators in a Workflow Template

The document version owner and workflow initiator can be included in a workflow template by selecting the appropriate check boxes on the workflow template. If these options are selected, the list of participants in a workflow task can be left empty.

12.8. Attaching Documents upon Approval

Feedback documents can be attached when any type of document approval (approve, not approve, postpone approval) is made.

12.9. Specifying the Due Time in Hours or by Specific Date and Time

For the task due by time, the number of hours and/or days can be specified for each workflow task. In previous versions, only the number of days can be set. For example, if the task needs to be completed in 5 hours, you would enter 0 days and 5 hours.

The due date is calculated when the workflow is launched, so this field should be configured for the number of days and/or hours from launch that the first task will be due. An exact date and time (fixed) can be specified in the workflow template once the workflow is initiated via manual initiation (if the template is configured to allow a change in the due date).

12.10. Cloning Workflow Templates

You are now able to clone a workflow template instead of creating a new template from scratch. This saves time if you have very similar templates to create. Once the template is cloned, you can change the properties of the cloned workflow template.

You can clone a template from both the FDA and Web Client.

12.11. Renaming Workflow Templates

The workflow template can now be renamed upon initiation if the "Allow initiator to Define" check box is turned on by an administrator in the template. This allows the user who is manually initiating the workflow to change the workflow name.

Active workflows can also be renamed in the Workflow Status Report area. In order to rename a workflow, you must be the initiator or a senior administrator.

This feature is useful since the My Tasks list and Workflow Status report now displays the workflow's name instead of individual document names. If the workflow template name is not altered, then several workflows with the same name appear in the views.

12.12. Restarting a Workflow

Workflows can be restarted on:

- An active workflow from the first activity to the current one.

- A completed workflow that has been marked as "not approved" or "approval postponed" from the first activity to the one that was marked as not approved or postponed.

Workflows can be restarted by:

- Workflow initiator

- Senior library administrator or higher

- Cabinet administrator if they have ownership of the cabinet where all of the main workflow documents reside.

If the workflow is restarted on a workflow, the current workflow is cancelled (if not already completed) and displays the "Restarted" status. A new, identical workflow is started and the previous activities are copied from the original workflow including feedback documents and comments. The name and date/time of the original workflow is appended to the description area of the new workflow template.

Workflows are restarted from the workflow status report.

12.13. Changing a Document Owner

Organizers and Cabinet Administrators, for cabinets they own, and higher roles can change the ownership of a document version. You can change ownership for one document at a time.

This is useful when certain users need to initiate workflows and the system administrator permission setting "Allow non document version owners to initialize workflows" is not enabled.

This is also useful if the "Include Document Version Owner" check box is selected on the workflow template when workflows are automatically started.

12.14. Adding Groups to a Workflow Template

The limit of 50 participants per workflow has been removed. You can now have unlimited workflow participants.

When adding groups to an activity, it will be expanded to individual users when initiating a workflow. Adding or removing users from a group will not affect existing workflows.
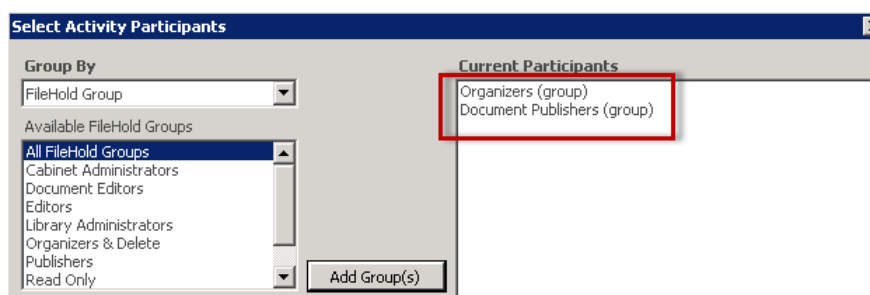
12.15. 1 of X and Task Reservations

When a Library Administrator creates a workflow template, they can decide if only one user out of a group of participants needs to complete a task by enabling the 1 of X check box in the template. For example, a sales group consisting of four users is added as the participants in a review task but only one person on the team needs to complete the review the document.

If only one person has to complete the task (1 of X option is selected), then the option to "force the reservation" of a task is available. Participants may be forced to "reserve" a task in a workflow depending on how the template was configured. If enabled, this enforces that one user out of the group of participants must reserve the task before the task can be reviewed or approved and the task completed.

If the "force reservation" setting is not enabled in the template, then the task can be completed without a reservation; however a reservation can still be made for the task (but it is not enforced). Only one participant needs to complete the task if no reservation is made since the 1 of X option is enabled.
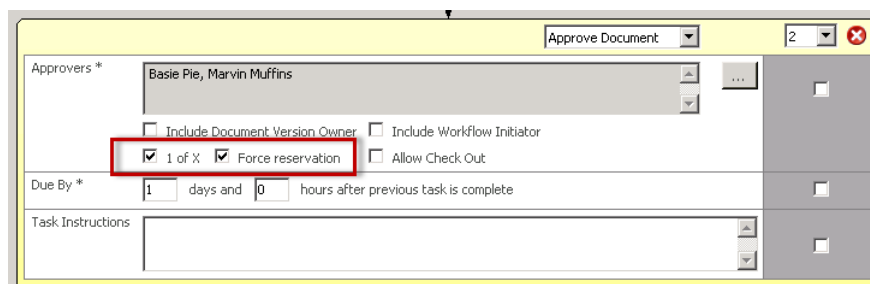
12.16. Postponing an Approval Status

There are situations where a document cannot be approved because some conditions have not been met but there is nothing wrong with the document itself. An option called "Postpone Approval" can be used in these conditions since the workflow can be restarted on the same document version. This differs from the option "I do not approve this document" since it rejects the current document version and to restart a workflow, you would have to create a new version.

Once the "postpone approval" option is selected, the workflow is immediately terminated and the status of the document will be set to "Approval Postponed".

A feedback document can be attached to a postponed approval.

12.17. Multiple Document Workflows

In some workflow instances, multiple documents may need to be either reviewed or approved together as a "package". In this case, multiple document workflows can be used. Multiple document workflows must be *initiated manually*. Once a group of documents is selected, a workflow can be initiated to create a single workflow instance. In order for the workflow initiation to be successful, all of the documents must meet all the requirements such as belonging to a schema that uses the same workflow template and must be accessible by all participants listed in the template.

When a workflow is initiated on multiple documents, these documents are called the "main documents" meaning that all the documents in the package must be approved and/or reviewed together. Once the documents in the package have been reviewed and/or approved, all of their statuses are changed to the same status such as "reviewed" or "approved". Main documents can be added or removed from the workflow after it has been initiated.

Multiple document workflows can also have "supporting documents". Supporting documents are added to the workflow instance to assist in the review and/or approval process of the main documents. A supporting document can participate in multiple active workflows; however, it has to be a supporting document. It cannot be a main document in another workflow. Supporting documents do not get marked as "reviewed" or "approved"; their status remains unchanged.

All main and supporting documents can be seen in the "*Documents associated with workflow template name*" pane.

12.18. Checking Out Documents under a Workflow

A document under a workflow process can now be checked out by a participant in the active workflow activity. Once a document has been checked out by a participant, it cannot be checked out by another participant until the document has been checked back in.

The review or approval cannot be completed while a document in the activity is checked out and the document must be checked in before a review or approval can be submitted. When the document is checked in as a new version, the version number is increased and becomes the version associated with the workflow.

In order to use this feature, a permission setting in the System Administrator area must be enabled. The option "Allow Check Out" in the workflow template must be enabled for each activity in order for a participant to check out a document. If the option is not enabled in the template, then none of the documents in the workflow can be checked out for that activity.

If the 1 of X option is selected on the template, then the task is automatically reserved by the user who has checked out the document. The task remains reserved after the document is checked in so the user can complete the approval or review task.

12.19. Approval Status in Version History

The column "Approval Status" has been added to the version history for a document.

13. SERVER SIDE OCR

The FileHold server side OCR feature can provide OCR (optical character recognition) for PDF and TIFF documents so that they can be indexed and searched. The OCR mechanism is located on the FileHold server which uses a queue to process the documents. Once the mechanism completes the processes of OCR'ing the document, the document is checked in as a new version that contains a text layer that allows the document to be indexed and searched within the document management system.

Server side OCR can be a time consuming mechanism; therefore, documents are added to a queue to be processed. All new documents and new versions, manually added or through an import mechanism (such as watched folders or managed imports), are automatically added to the queue. Older documents that already exist in the library can be added manually to the queue (latest version only).

Only PDF and TIF/TIFF type documents are processed. TIFF images are converted to searchable PDF documents. Once the OCR mechanism completes, the OCR'd document is checked in as a new version with the owner remaining the same. This new version is then processed by the full text search engine so it becomes searchable.

The languages supported "out of the box" by the OCR engine are:

- German
- English
- French
- Spanish

Other languages may be available through FileHold Professional Services. Contact sales@filehold.com for more information.

Server side OCR is an optional feature that is controlled in the FileHold license. To purchase the server side OCR feature, contact sales@filehold.com.

PDF or TIFF file
without text layer
Version 1

FileHold Server with
OCR engine enabled

Searchable PDF file
with text layer
Version 2
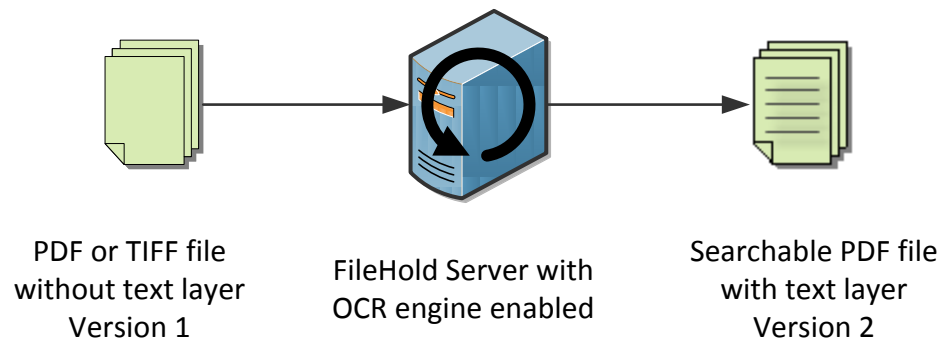
14. WEBCAP SCANNING

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

WebCap scanning is done via the FileHold Web Client which is a browser based client. In the Web Client, all scanning and viewing of the documents is done in the Scanner Inbox. The quality of the scan and compression of the final document that is uploaded to the document management repository or saved to the local computer can be controlled in WebCap settings.

The image viewer allows pages to be previewed, added, reordered, removed, zoomed, de-skewed, rotated, compressed, loaded from, and saved to disk. Documents can be stored in FileHold in TIFF or PDF format.

Documents in the Scanner Inbox are saved to the FileHold server until they are removed. This allows users to log off and come back to the images at a later time without losing them.

In order for users to use WebCap scanning, they need to be assigned a dedicated license in the User properties.

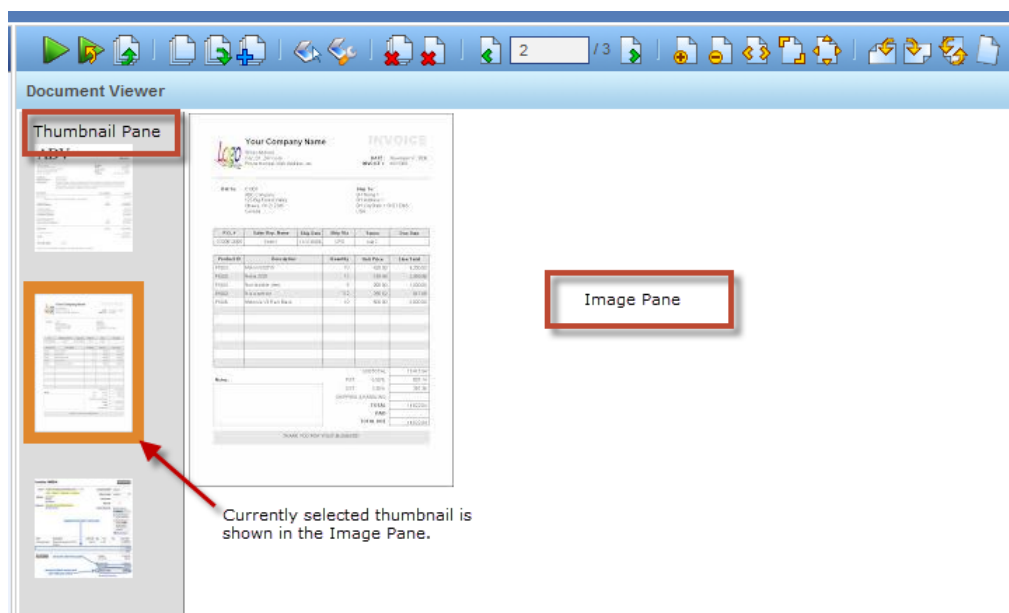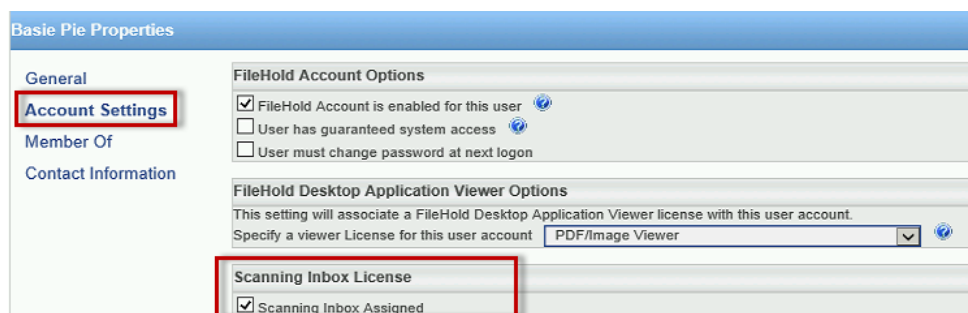WebCap is an optional feature that is controlled in the FileHold license. To purchase the WebCap feature, contact sales@filehold.com.

NOTE: This feature was also released as a part of FileHold 12 Hotfix 4.

15. SERVER SIDE AUTOMATIC DOCUMENT IMPORTATION

The server side Automatic Document Importation (ADI) mechanism allows importing a large number of documents into the document management system with minimal user intervention. It runs on the FileHold server to facilitate the mass migration of documents. ADI is similar to the Watched Folders functionality but can also be integrated with various custom migration tools using an API.

Several ADI "jobs" can be created by a Library Administrator or higher role. Each ADI "job" stores the configuration and status of the job. An administrator can configure the source type (Watched Folder or API), a time restriction for the job to run, the user account that is adding the documents, the source folder, target location and so on.

If a Watched Folder is being using for the job, it automatically adds files from a specified directory to a queue. Once processed, they are imported into the destination folder in the library using the specified schema and fixed metadata field values. The files from the specified directory can be monitored and brought automatically into the system. The input files can also be deleted.

If the source is an API, documents along with their target location in the library and metadata values are added to the queue using API calls.

Once an ADI job is configured, the user specified in the job is the owner of the documents once the files are processed. This user must have a Document Publisher role or higher and must have access to the schema and destination folder.

For each job, the status which includes the number of processed documents, pending documents, and errors are shown. Within each job, the detailed list of documents, status (pending, completed, error), the date they were added to the queue, date they were processed, the source path and target folder are shown. These import details can be exported into a CSV file. Once a document has been successfully imported, click on the document name to view the summary information. From here, you can be taken directly to that document in the library. Summary information can be viewed for any pending documents or documents with errors.

Automatic Document Importation (ADI) is an optional feature that is controlled in the FileHold license. To purchase this feature, contact sales@filehold.com.

16. BRAVA VIEWER UPGRADE (ENTERPRISE OFFICE VIEWER)

The Enterprise Office Viewer (Brava Viewer) has been upgraded to version 7.2. New features include:

- Improved Compare feature for the comparison of documents and versions. The Compare feature allows you to perform a graphical or textual comparison of two files.

- The Electronic Signature feature is designed to allow the placement of user-specific markup stamps (Signature items) on documents and drawings. Signature items that can be placed on documents and drawings include Signature images, Initials images, Seal Images, Name strings, Title strings, and current Date.

- The Checkview feature allows authors of markups to assign a placeholder and descriptive text in a markup template to be later reviewed for completeness. The template is later used on a class of documents to be reviewed and verified with greater efficiency. All Checkview tags contained in the opened markup files can be sequentially reviewed in the Checkview tab.

The Brava viewer is an optional feature that is controlled in the FileHold license. To purchase this feature, contact sales@filehold.com.
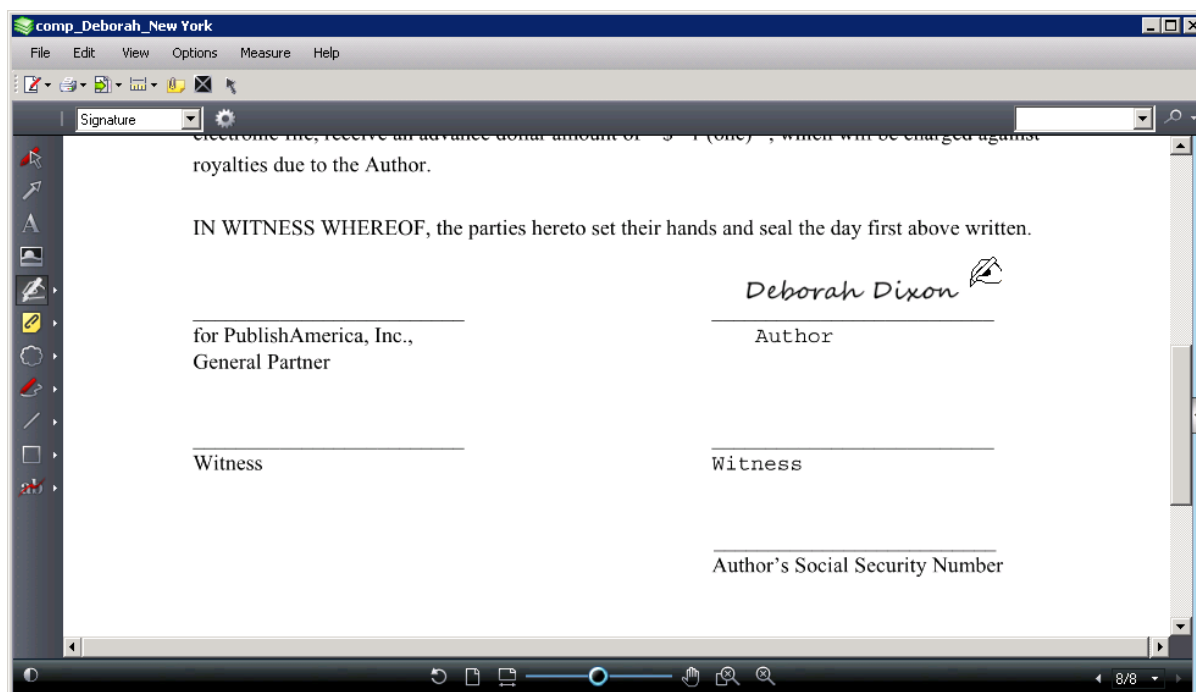
16.1. Brava Viewer Supported File Formats

The following file formats are supported for the three levels of Enterprise Office Viewers (Brava viewer version 7.2).

16.1.1. Enterprise Office Viewer

Neutral Formats

Portable Document Format	PDF
Content Sealed Format	CSF

Tagged Image Format	TIFF/TIF

Imaging Formats (additional formats available*)

CALS (Group IV)	CAL, CG4, GP4, MIL
EDCARS	EDC
GIF	GIF
ISO 8613/CALS	ISO, CAL
JPEG Compressed Image	JPG, JPEG, JP2
Portable Network Graphic	PNG
Tagged Image File	TIF, TIFF
Windows Bitmap	BMP

Additional Document and Image Formats*

Corel Draw	CDR
Corel Presentations	SHW
DataBase Formats	DBF
DocuWorks	XDW
FAX CITT Group 3 Fax	FAX
Hangul Word Processor	HWP
Hyper Text Markup Language	HTML, HTM
Microsoft Email	MSG
Microsoft Excel	XLS, XLSX, XLSM, XLSB, XLTX, XLTMXLS
Microsoft PowerPoint	PPS, PPT, PPTX, PPTM, PPSX, PPSM, POTX, POTM
Microsoft Visio	VSD, VST, VDX, VSX, VTX
Microsoft Word	DOC, DOCX, DOCM, DOTX, DOTM
Microsoft Works	WDB, WPS, DOCX, XLSX
PageMaker	P65
QuattroPro	WB1, WB2, WQ1
Rich Text Format	RTF
Samna Word	SAM
Windows Write	WRI
WordPerfect	WP5, WP6, WPD, WPF
WordStar	WS

16.1.2. Enterprise Office Document View with CAD Support

AutoCAD Drawing (2D) (through version	DWG

2014)

AutoCAD DXF (through version 2014)	DXF
AutoCAD Web Format (through version 2014)	DWF

16.1.3. Enterprise Office Document Viewer – Engineering Edition

000 HPGL Plot File	000
906/907 Plot File	906/907
Auto-trol Raster	DX
Auto-trol Vector	DG
CADKEY	PRT
CAD Overlay	RLC
Computer Graphics Metafile	CGM
GTX Group III, IV	G3, G4, CG4
GTX Runlength	RNL
HP CAD ME10 (through version 13)	CMI, MI
HPGL Plot File	PLT
IGES (2D) (version 5.2)	IGS, IGES
Inventor (2D) (versions 5.3 - 2013) **	IDW
MicroStation Drawing (through version 8.11, including XM, V8i)	DGN
MicroStation Group IV	CIT
MicroStation Runlength	RLE
MYRIAD 3D View Sets	MVS
OrCad (version 10)	DSN
Solid Edge Drawings (2D) (versions 8 - ST5)	DFT
SolidWorks Drawings (2D) (versions 97 - 20011)	SLDDRW

*Some formats may require additional purchase

**Requires Free Inventor View

17. MINOR MISCELLANEOUS IMPROVEMENTS

The following are smaller improvements that have been made throughout the document management software.

17.1. Folder Colours

Colour can now be applied to the folders in the library tree. This is set in the folder properties. Colours include: yellow (default), red, green and blue. Folder colour can be seen in both the FDA and the Web Client.
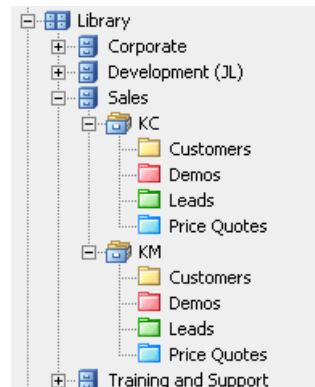
17.2. Start Up Page for Web Client

The default page after logging in can now be set in the Web Client. The startup page determines the window that is displayed after log in: Blank, Simple Search, Advanced Search, or My Tasks. This is set in the User preferences in the Web Client.

This feature already exists in the FileHold Desktop Application in the User preferences.

17.3. Library and System Administrator Audit Log Filtering

The Library Administrator and System Administrator audit logs can now be filtered by:

- A partial description
- User name from a drop-down list

The following is now logged in the Library Administrator audit log:

- Creating and cloning workflow templates
- Modifying workflow templates
- Deleting workflow templates

17.4. Limiting the Number of Expanded Drawers

The number of drawers that can be simultaneously expanded in the library tree can be set. The lower number of expanded drawers allows for a faster page loading time due to the lower number of permissions that needs to be calculated before displaying the library structure to the user. The last drawers that were opened by the user are preserved when the library is refreshed. This is set in the User Preferences.

This option may be set and/or locked down by the System Administrator through the Centralized Options Management.

17.5. Opening a Document in Multiple Tabs in the Viewer

In the User preferences of the FDA, a new option called "Allow opening one document in multiple tabs" allows single document can be opened several times in multiple tabs using both Brava and PDF/Image viewers. Note that "Open documents in the Document Viewer using separate tabs" needs to be enabled in order to enable this feature. This feature is useful in multiple monitor situations.

17.6. Document Usage Log Logging Improvements

Document usage log improvements include:

- Version number and FileHold ID number of the original document when a file is copied. Both original and copied documents contain this information.

- Created and deleted links between documents

17.7. Document Usage Log in FDA

The document usage log is now available in the FileHold Desktop Application (FDA) in the Administration menu. This is available to Library Administrators and higher roles.

The information in the view of the log can be exported to a CSV file from the FDA.

17.8. Undo Check Out and Delete Document

When checking in a document with no changes (undo checkout), the option to delete the local copy is now available using a check box.
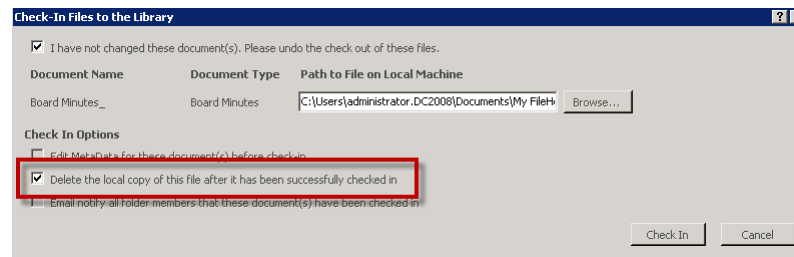
17.9. Exceeded Login Attempts Notification

The system administrators will now receive an email notification if the number of login attempts is exceeded. Once a user exceeds the set number of login attempts, the user account becomes disabled.

The number of logon attempts allowed is set in the Logon and Password Security window in the System Administrator area of the Web Client.

17.10. Repository Full Email Notification

The system administrators will now receive an email notification when the maximum storage space is reached in the repository. The repository threshold can be seen in the Repository Locations window in the System Administrator area of the Web Client.

17.11. Custom File Naming for Offline Documents

A custom file naming pattern can now be configured for offline document type formats.

17.12. Improved Paging Navigation

The numbering of the pages has been improved so that the page numbers are now larger, bolder and can be accessed from the top and bottom of the screen. This improvement has been made in both the FileHold Desktop Application and Web Client.

17.13. FileHold Health Checker Report Package

If the FileHold Health Checker encounters issues, an HTML report should be emailed to FileHold support (support@filehold.com) in order to diagnose the issue. The Health Checker report can now be packaged with the Event Log from the server to be sent for review by the support team. You are prompted to select an option once you save the report:

- Health Checker report only
- Health Checker report and log
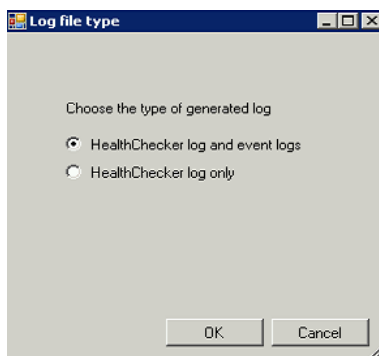
You can also run the Health Checker report using custom database login credentials.
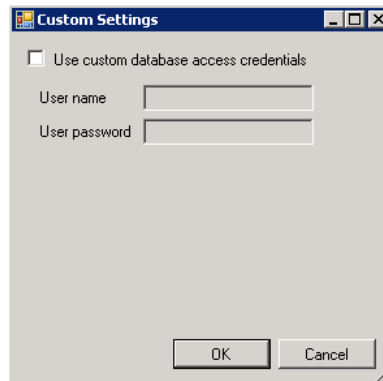
17.14.Pre-Installation Health Checker

The Pre-Installation Health Checker can determine if your server is prepared correctly for the installation of the FileHold Server.

17.15.Outbound Email Settings Test Email

You can now test the outbound email server settings with a click of a button in the System Administration > General settings page. If the outbound email settings are configured correctly, a message is sent directly to the recipient and a "Test email sent successfully" message appears.

18. KNOWN ISSUES

The following is the list of known issues that are a part of the FileHold 14 release.

ID	Title
5219	(FDA) Issue when 'checking out' or 'making a local copy' of multiple documents with duplicate names
5995	(FDA) Non-system administrators fail to add a document associated with a 'Read-Only' metadata field which was not allowed to be modified
6664	(FDA) Unexpected error thrown when exporting a document to a local directory where its filename & destination path exceed 260 characters

ID	Title
6647	(Mobile Web Client) Clicking "Go" on keyboard for a Simple Search on Android device does not execute the search
6673	(Mobile Web Client) Empty saved search - dates blank out after using Back button in specific scenario
6675	(Mobile Web Client) Long list of drop down values takes a long time to load for a search
6646	(Mobile Web Client) No warning message when adding a document and auto-starting a workflow when the workflow participant does not have access to the destination folder
6674	(Mobile Web Client) Simple search term does not clear after workflow is initiated on document
6455	(Mobile Web Client) Strange behavior when taking picture to add as regular documents or review/approval feedback document (iPhone-5 with iOS-7)
6705	(Mobile Web Client) When document is not approved, the feedback attachment document is not uploaded
6657	(OCR) Better handle the hard coded 1 million max documents added to the queue.
6601	(Server installer) No warning message about missing IIS when installing FileHold server on a custom web site
6579	(Web Client) Empty saved search does not display correct result when user changes criterion in a specific scenario
6707	(Web Client) Incorrect behavior of screens after initiating a Workflow on a document found as search result in a quick search
5564	(Web Client) Issue when getting a copy of a file using Firefox
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
6702	(Web Client) SysAdm was brought to the FileHold Library screen upon resetting password of a Locally Managed user in the System Admin > Users area
6706	(Web Client) Value supplied in the advanced search is still saved upon launching it as a quick search
6008	(Web Client) Wrong output on a 'Date' metadata field configured with a 'yyyy-MM' format
6254	(WebClient) Text surrounded by angle brackets were treated as HTML elements in the WebClient
6734	'Archive Cabinet/Folder' context menu option is only available to 'System Administrators'
5233	Auto-tagging and number field problem during changing a range of metadata.
6691	Disable the 'Lookup' button when user attempts to associate multiple values to a 'multi-select' drop down menu metadata field while in the process of adding a document
5136	Error during clone/copy structure with auto-tagging
6518	Failed to apply a left or right character with a digit nine anywhere in the mask
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/
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)

ID	Title
	Many FDA user interface adjustments to accommodate desktop sizes other than 100%
	Metadata fields can be removed from a schema regardless of whether or not there is data present
	Newly created metadata fields when editing a document schema are now checked for adding the in the add metadata dialog.
	Several manage imports logging improvements
6603	Sometimes FastFind selection search (CTRL+D) needs to be invoked twice to work
	SQL Reporting Services now supported for SQL Server 2012
	The approval status of each document version will now be displayed in the document history view.
	The enter key will now cause an advanced search to execute.
	Usage log details column now contains information for many different operations.
5932	Vague search criteria nomenclature related to 'Date' metadata