FileHold

Document & Record Lifecycle Software

RELEASE GUIDE

VERSION 15.0.2

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1. FILEHOLD 15 OVERVIEW

This document is a high level description of the new features and enhancements of FileHold 15.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 15

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 10.x, and 11.x (32 bit and 64 bit)
- Microsoft Edge – current version

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

2.5. Microsoft Office Support

- 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)
- Microsoft Office Professional 2016 (32 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 6,7,8 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 10.x, and 11.x
- Mozilla Firefox – current version
- Google Chrome – current version

2.9. Print to FileHold

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

3. FILEHOLD COURIER

For some time FileHold has offered a web portal to allow public documents to be visible to a wide variety of users. Private documents have been limited to users that have been granted a FileHold license and trained in using the FileHold client software. You can attach documents to email, but then they leave control of FileHold. You have no way of knowing if they are received or trapped by anti-spam or anti-malware filters and you have no way for the receiver to approve the document you send them. The documents transit through public email servers and could be intercepted without yours or the receiver's knowledge.

Courier offers a new option for delivering documents to anyone with an email address. The documents themselves are not attached to an email. Instead email is simply the notification mechanism that a document is available for their viewing or approval. All interactions between Courier and the receiver are recorded in a permanent log for future reference. The Courier client software works in any modern desktop or mobile browser and requires no special training to use.

Courier is a standard feature of FileHold. It is included with every FileHold installation. The Courier client can be customized to include custom logos and colors to match corporate branding. Each transmission can included customized header fields, customized detail fields, and customized notifications suited to the end purpose.

Some typical scenarios where this feature will be used include the following:

- Engineering transmittals
- Contract approvals
- Employee attestations
- Sending documents like invoices, purchase orders, and manifests

Courier is a "proof of delivery" system where unlike email it is a secure method of sending documents. With email, there is no way to know if the documents ever arrived, if the attachment could be opened by the recipient, and so on. With Courier, recipients are notified by email of a transmission and are taken to a secure web site, called the Courier portal. In the portal, recipients can then view or approve documents and the transmission is fully tracked.

Normally FileHold users must have a registered user license. This would be a very costly method to send a single document, so Courier introduces a pay per use option. Documents can be sent to an enabled FileHold registered user for "free" or customers can prepay for a certain number of uses of the Courier portal by non-registered users. When a transmission is sent to a non-registered user, the cost of the action will be deducted from the amount of one-time license units they purchased. Additional one-time license units can be purchased at any time.

Once a sender transmits documents for viewing or approving from within FileHold, the recipients receive an email containing a secure link to the Courier portal. Once the link is clicked, they are taken to the Courier portal where the documents sent in the transmission can

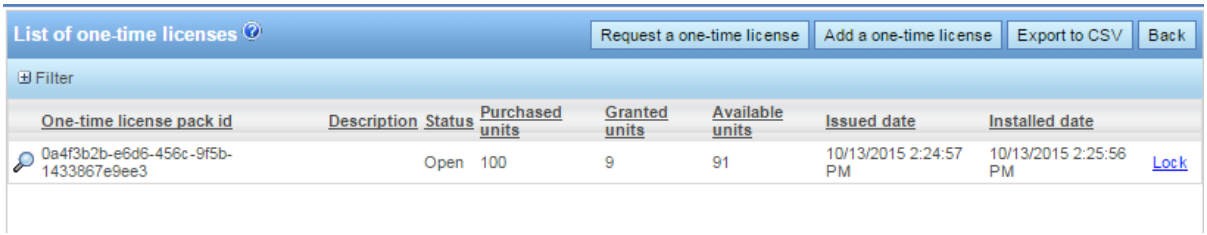
be viewed or approved. If the recipient does not complete the view or approve action by the specified time they can be sent a reminder. The sender can also be notified of overdue transmissions. All aspects of the transmission is recorded in the Courier transmission report.

3.1. One-time Licenses

A new license type called One-time Licenses is required when documents are sent out through Courier to non-registered FileHold users. Customers can purchase these one-time licenses in "packs". Each one-time license pack contain a number of one-time units. Packs can be purchased in small or large volumes of units. Contact sales@filehold.com for one-time license pricing.

Units are consumed when documents are sent out through a Courier transmission. The number of units consumed in a view or approve action depends on the action. For example, viewing a document consumes one unit and approving a document consumes two units.

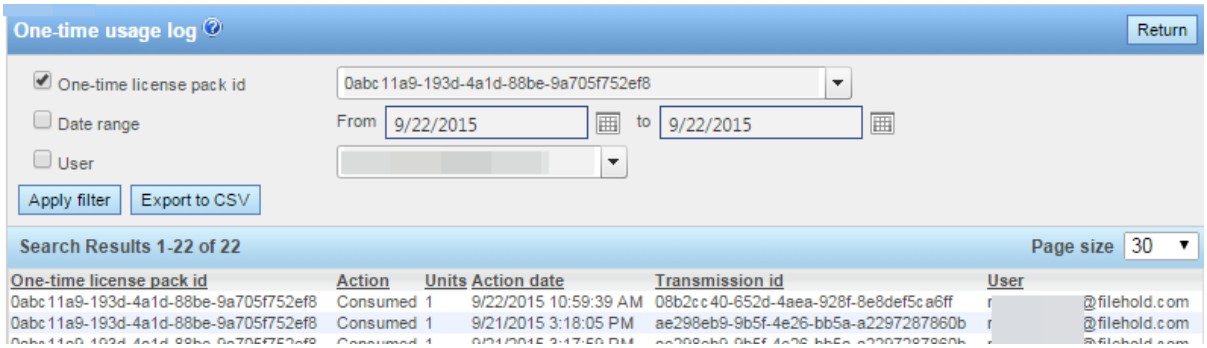
One-time licenses are managed from the License information page in the Administration Panel. One-time licenses packs can be requested, added, locked and cancelled from the list of one-time licenses.



3.2. One-Time License Audit Log

The One-time usage log is a new report in the Administrative reports menu. It can be used to view the use and consumption of units in a one-time license pack. The license pack ID number, the action, the number of units consumed, the date the action occurred, the transmission ID number, and the email address of the user that the action was transmitted to.

This log can also be viewed from the list of one-time licenses from the Licensing page.



3.3. Courier Templates

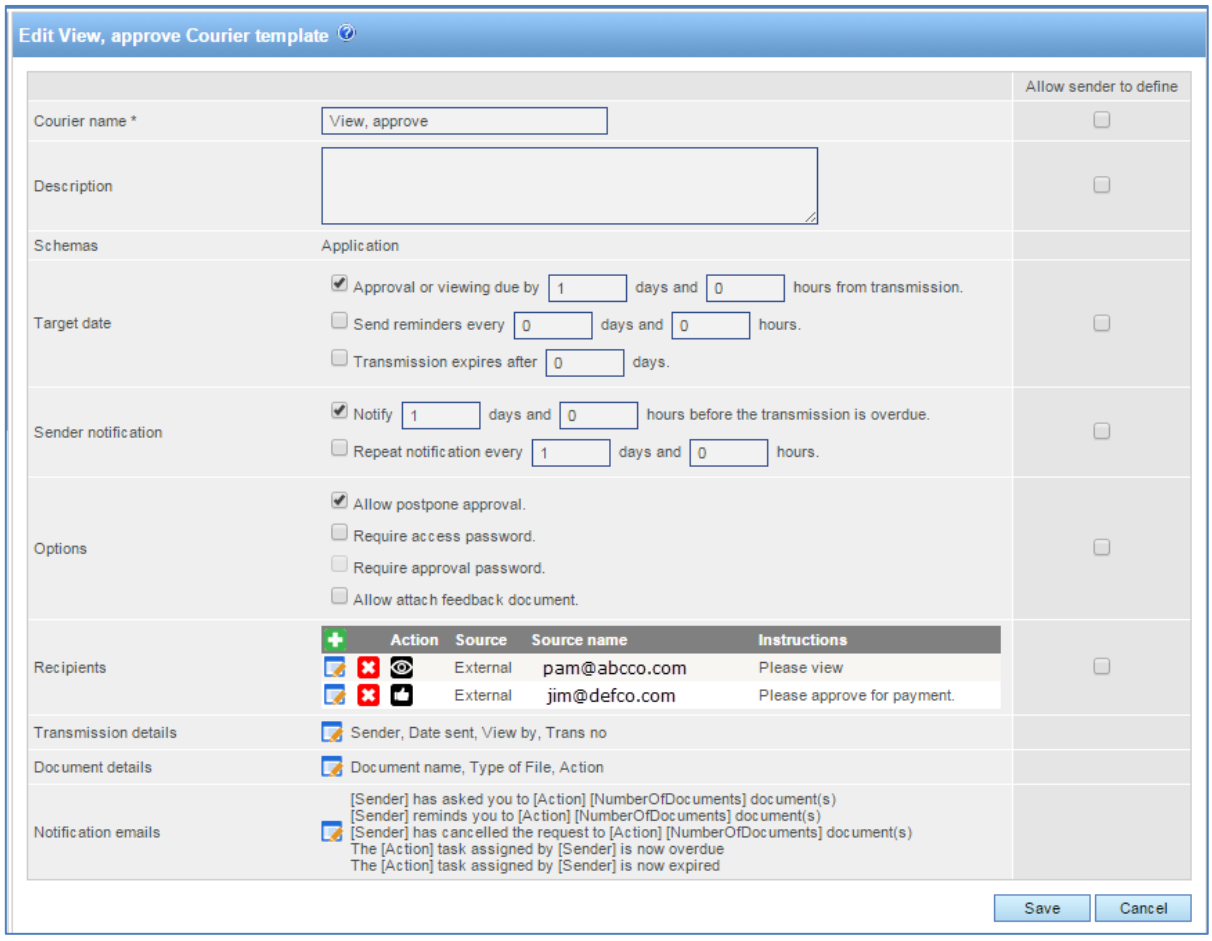
Library administrators and higher roles can configure the Courier templates in order to route the documents for viewing or approving in a transmission. Courier templates are set up for those users who will be sending documents to internal (registered, enabled FileHold user) or external users. Templates include the name, description, target date for the task, sender

notifications, passwords options, actions for the recipients, transmission header and details, and notification email formatting.

Courier templates can be configured to allow the sender of the transmission to define any aspect of the template. Anyone who has document publisher rights or higher can initiate a Courier transmission unless they are restricted to do so by an administrator. Usage of Courier can be restricted at the group level for groups with a document publisher role or higher by a system administrator.

When initiating Courier transmissions and sending to a one-time user, the recipient must have an email address defined in the template. The transmission can be sent to multiple one-time users in the same template.

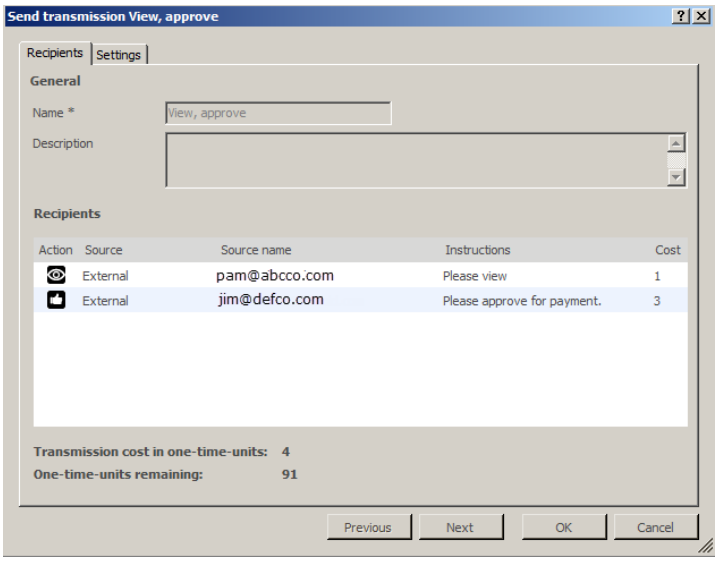
Once the templates are created, they are assigned to document schemas. Once assigned to a schema, FileHold users can then initiate transmissions.



3.4. Initiating Courier Transmissions

Courier transmissions can be initiated from both the FDA and Web Client. If any sections of the Courier template has been set to “Allow sender to define”, the sender can modify the courier template upon initiation. A Courier transmission can be sent by anyone who has document publisher rights or higher role.

Once the sender initiates a transmission, email notifications are sent to the recipients. The emails contain a secure link that takes them to the Courier Portal where documents can be viewed and/or approved.



3.5. Viewing or Approving Documents in the Courier Portal

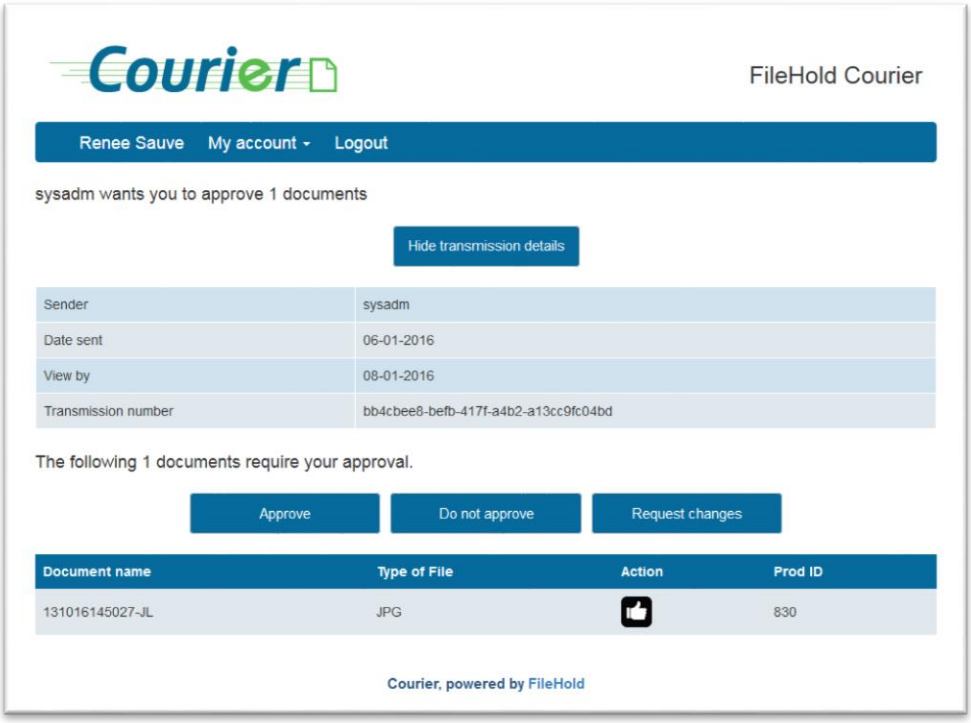
Once a Courier transmission has been sent, email notifications are delivered to the email addresses of the recipients. The email contains a link that takes the person to the Courier portal where documents can be viewed or approved.

The Courier portal has been designed to be easy to use for the recipients of a transmission. The Courier portal can be customized to include your own logos, header information, extra links, and colour.

The portal displays the transmission details and the list of documents to be viewed or approved. For view actions, documents can be downloaded after clicking the document name. One-time license units are only consumed after the recipient takes some action. Up to that point the transmission can be cancelled and one-time license units remain unused. Once downloaded, the document is considered “viewed” and a one-time license unit is consumed.

For approve actions, documents must first be downloaded prior to approving. Once downloaded, a one-time license unit is consumed. Once approved, an additional one-time license unit is consumed. If the document is not approved, two one-time license units are consumed whether the document is downloaded or not and any other recipient transmissions are voided. Any voided one-time units remain unused. If a Courier template allows the recipient to request changes (postpone approval), then no one-time license units are consumed and all other recipient transmissions are voided.

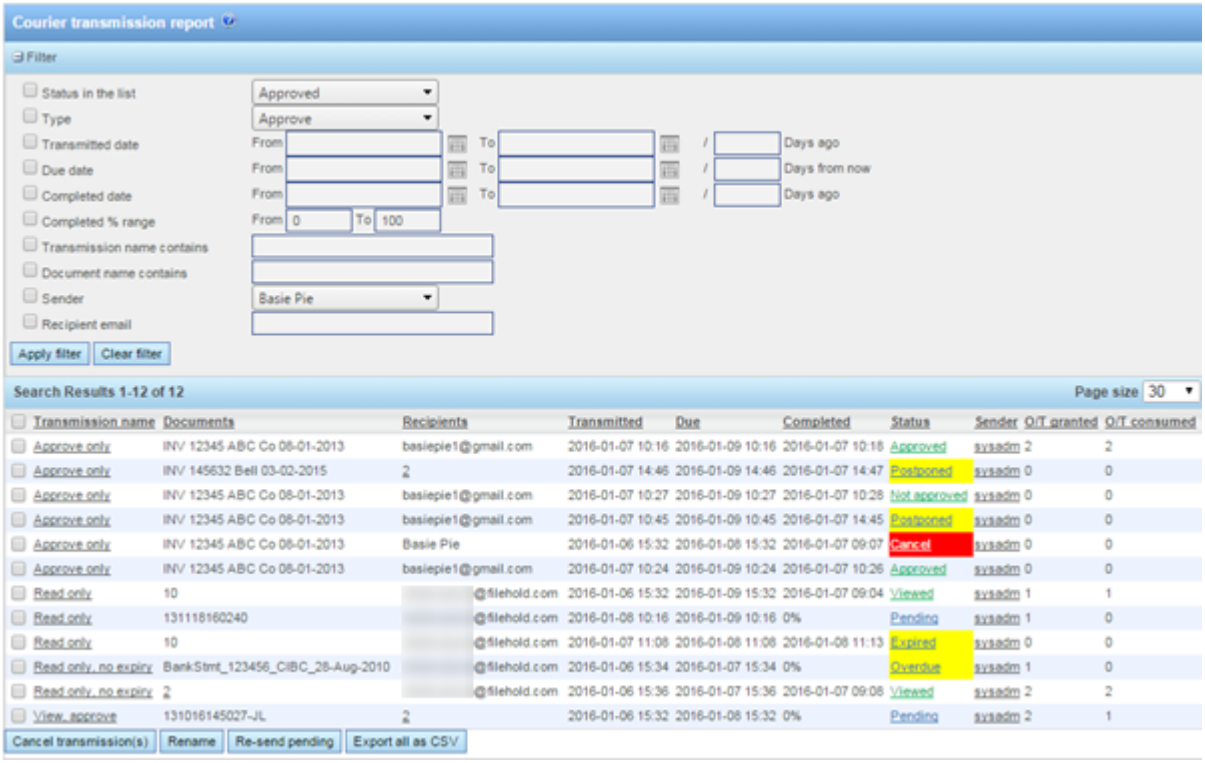
If transmissions have expired, the transmission is no longer accessible in the portal.



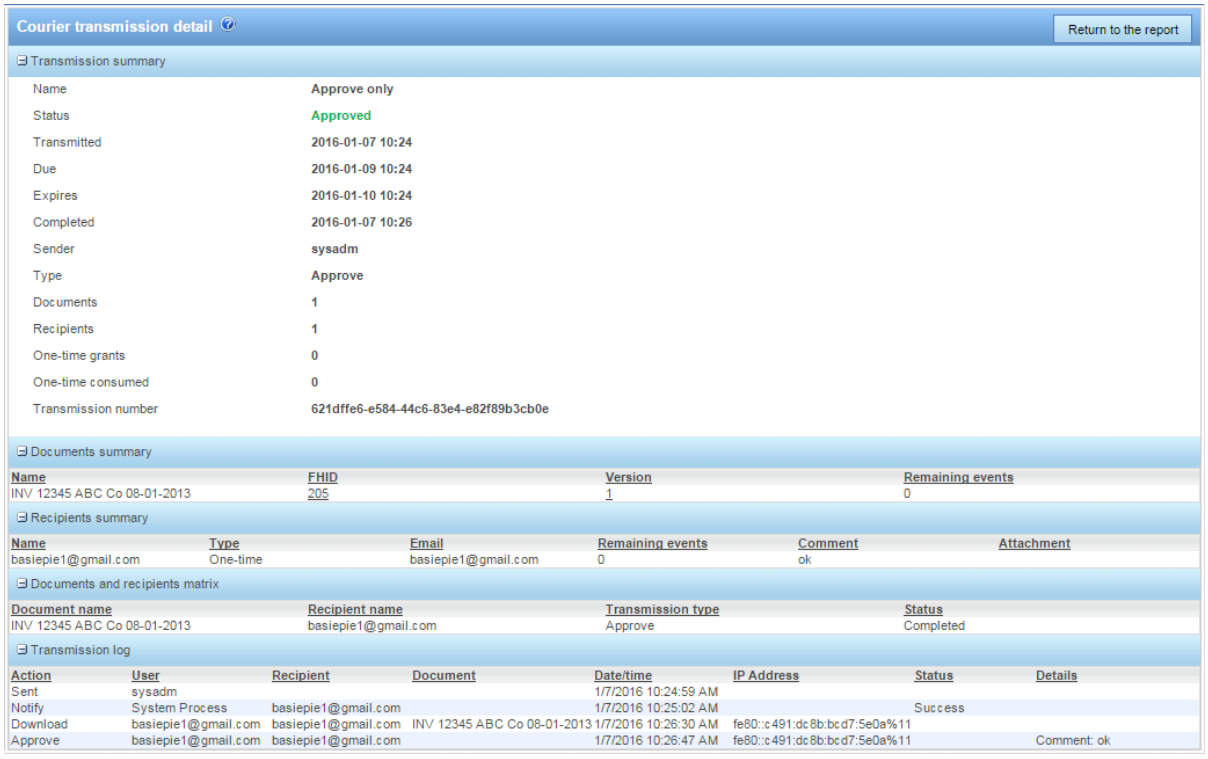
3.6. Courier Transmission Report

The Courier transmission report is a list of all the transmissions that are pending, completed, overdue or expired in the system. It provides an audit trail that is maintained each time a Courier transmission is sent and one-time units are reserved or consumed. The report includes a number of items such the transmission name, the recipients of the transmission, the sender of the transmission, the documents involved, the date of transmission and when the transmission is due, and the number of one-time units granted and consumed.

A sender of a transmission with a document publisher role or higher can access the Courier transmission report in the Administration Panel > Workflow management menu.



Once the Courier transmission report has search results, the transmission details can be viewed. The Courier transmission detail contains a summary of the transmission, the documents, the recipients, a documents and recipients matrix, and the transmission log.



4. SYSTEM ADMINISTRATOR DASHBOARD

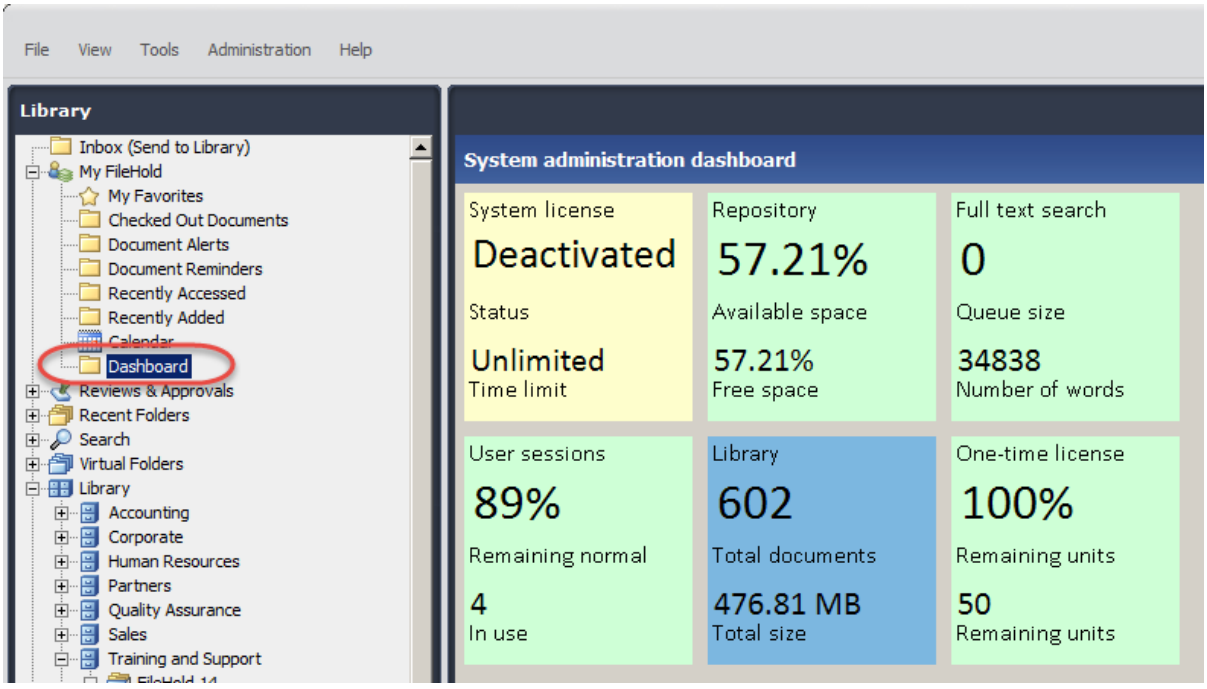
The system administration dashboard consolidates key metrics about the operation and usage of the system in an easy to read format. The elements or tiles in the dashboard displays a consolidated view of the following information

- System license
- Repository
- Full text search
- User sessions
- Library statistics
- One-time Courier licenses

The colour of the tiles depends on the status of the dashboard element:

- Problem — red
- Warning — yellow
- Normal — green
- No thresholds — blue

The dashboard is located under My FileHold in both the FDA and Web Client. The dashboard can be made viewable by all users by enabling a permission setting. The dashboard elements are hyperlinked to the related areas of the library and administration sections for a corresponding system role.

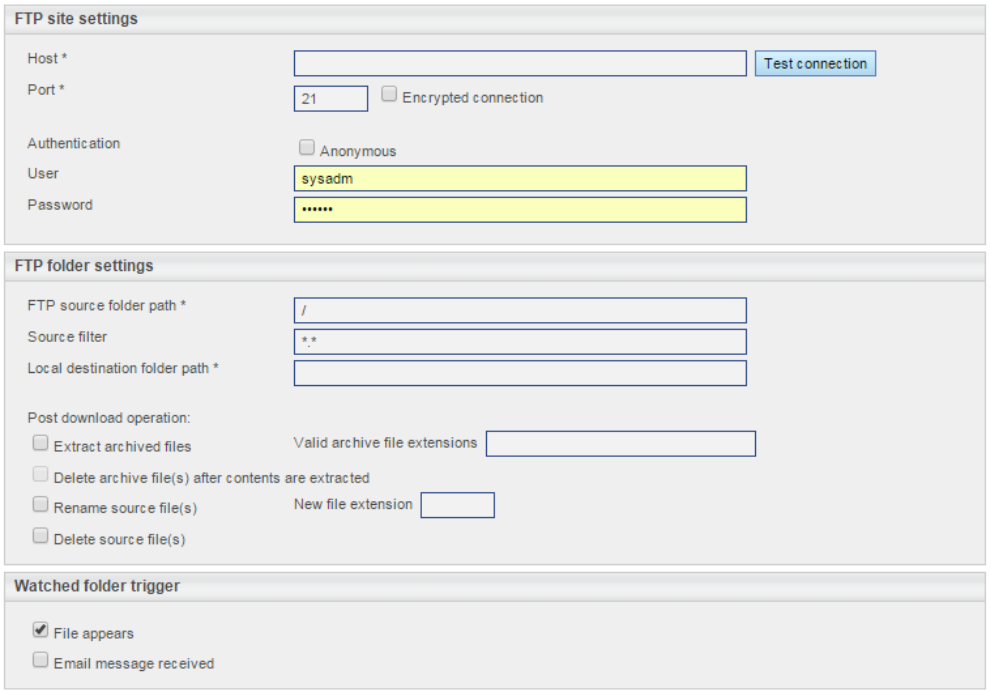


5. ADI JOB ENCHANCEMENTS

Several enhancements have been made in the Automatic Document Importation feature.

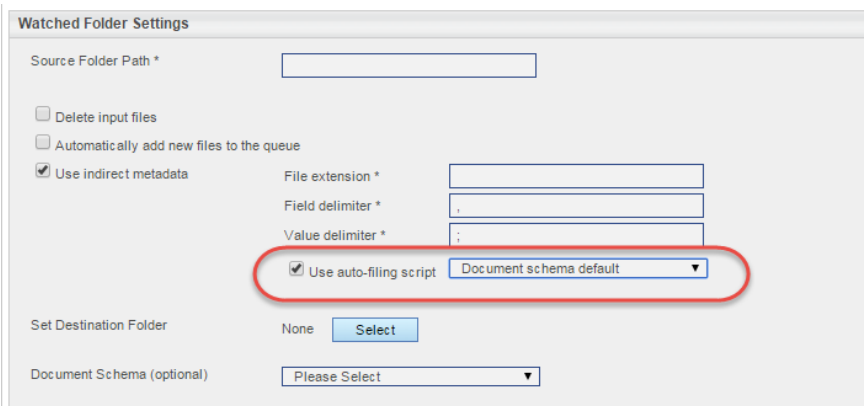
5.1. Watched FTP Site

A new job type called Watched FTP site is now available. Files from an FTP server can be downloaded and processed. This method is useful when, for example, a scanning company completes a batch of scans and wants to send them into their customer's FileHold repository. The scanned documents are stored on an FTP server known to the scanning bureau and the customer. ADI can periodically watch for the files to appear on the FTP server or monitor an email box to get the trigger to download the files. The source files can optionally be compressed in an archive on the FTP server and decompressed after they are downloaded. The files can be directly imported or a delimited file containing file names and metadata can be provided.



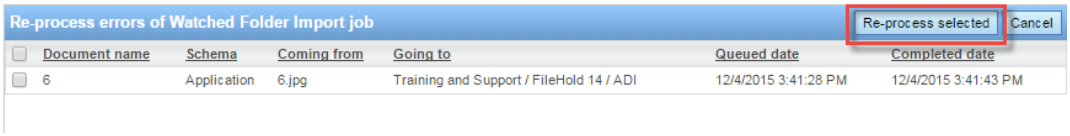
5.2. Auto-filing Scripts

Auto-filing scripts can now be used when the indirect import method is used. The auto-filing script configured for the schema can be used or an alternate auto-filing script can be selected as well.

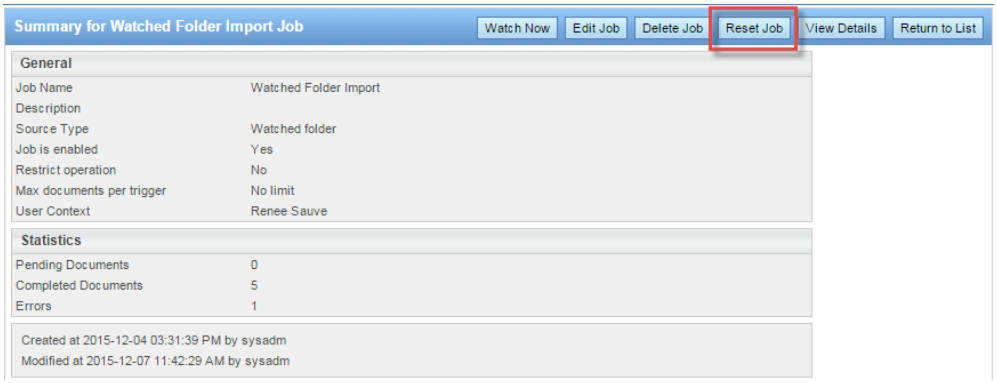


5.3. Error reprocessing

- Any errors that occurred during the import of documents can be reprocessed by a click of a button. Documents can be reprocessed individually or in a group. This assumes that correction has occurred on the issues that caused the error. If the error was repaired then the document will be successfully imported into the repository.

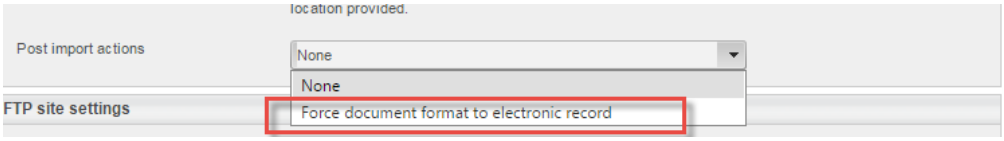


- All pending and failed documents can be removed from the queue and the import folder can be rescanned using the new Reset Jobs feature.



5.4. Convert to Electronic Record

Documents can now be automatically converted to an electronic record type after importing the documents. This allows a single document schema to be used where some documents are created through multiple versions inside FileHold using the electronic document format and others are scanned in bulk and require the electronic record format.



6. SEARCH ENAHANCEMENTS

A number of enhancements have been made to the search area.

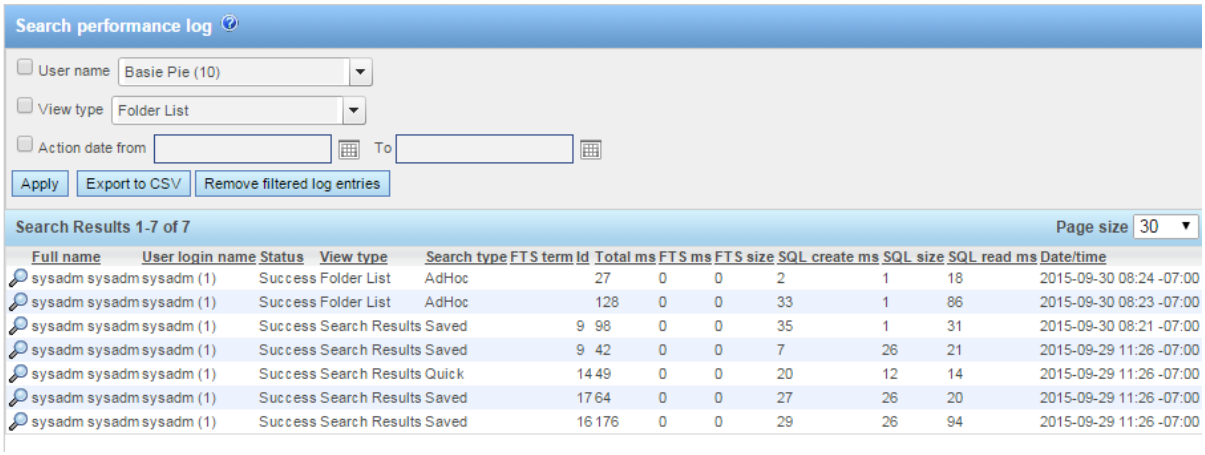
6.1. Logging User Searches

The search performance log is a way to record the searches that are being run in the system. Since FileHold does not restrict how users conduct their searches, this log can help the FileHold support team and customers pinpoint any search issues that can occur from time to time.

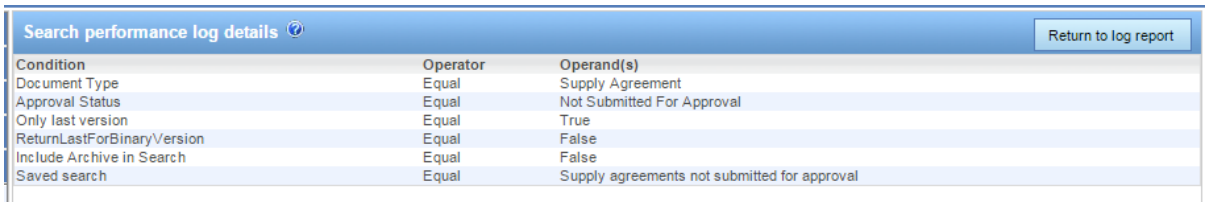
The search performance log is not enabled by default. In order to see the search performance log results, it must first be enabled. It should only be enabled when troubleshooting searches is required.

Every list of documents retrieved in FileHold is done using an internal search. The search performance log includes a record of all search types performed in the document management software. This includes simple, advanced, and saved searches, retrieving a folder list, virtual folder contents, the document tray, linked documents, my favorites, checked out documents, document alerts, document reminders, recently accessed, recently added, or workflow documents.

The log can be filtered for a particular user, the view type, and action dates. The search results display the full name and user name, the status, the view type, the search type, various time measurements, and the date and time the search was performed. The search results can be exported to a CSV file and used for further analysis.



The specifics from each search conducted can also be viewed in the Search performance log details.



6.2. "Contains" or "Does not Contain" Searches

The "contains" and "does not contain" search operator selectors have been modified so that very specific areas of FileHold can be searched. In previous versions of FileHold, the "contains" type searched the full text search index which includes the metadata, file name, file properties, and the contents of the documents. In this release, a new search type for "contains" operators can be restricted to searching only the database. This can improve search performance for cases where the criteria used with contains is simple. The full text index search can still be used when complex and or natural language criteria are required.

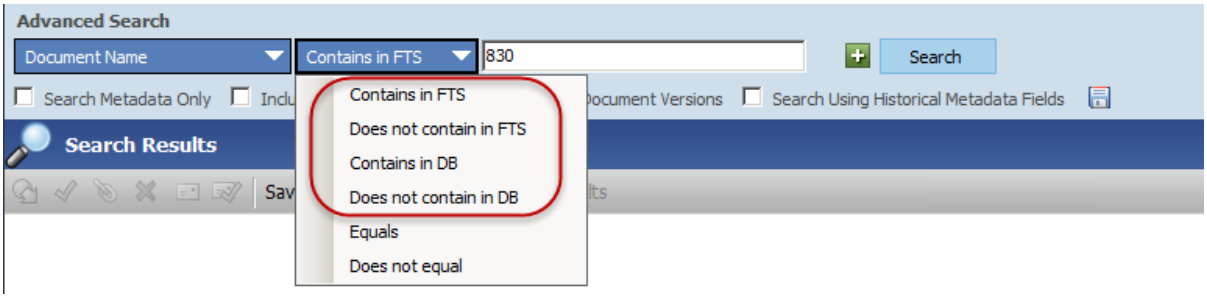
Two new options, "in FTS" and "in DB", are now a part of the "contains"-type operators:

- Contains in FTS– Searches the full text search index which includes the metadata, document name, file properties, and contents of the document and contains an exact match of the value.

- Does not contain in FTS– Searches the full text search index which includes the metadata, document name, file properties, and contents of the document and the value is not present.
- Contains in DB – Searches only the metadata for a pattern which can include wildcards. The contents of a document are ignored (full text search index).
- Does not contain in DB – Searches only the metadata and the pattern is not present. The contents of a document are ignored (full text search index).

Boolean, character and sentence type searches are still supported for the “contains FTS”-type search operators.

The contains “in DB” type searches are available for document name, document control number, version control number, text, URL, drop-down and drill-down type metadata fields.



6.3. Limiting Full Text Indexing to Specific File Formats

The full text search index can now be limited to only index certain file types in the system. This will ignore all other file extensions from being indexed. This can prevent from having a potentially very large full text search index that does not contain much search value and causes time-outs.

The FileHold server administrator can define file types whose contents will be included in the FTS index. Excluded documents will still have their metadata and properties indexed; only the contents will be excluded from the index.

A list of file extensions which are exclusively indexed by dtSearch can be listed in the following entry. If value is empty then all file types (excluding items in the ExcludedFilesList entry) are indexed.

For compound files, such as a zip archive, all files inside a zip are assumed to be included in the index unless specified. To specify that only certain file types are indexed, the format is “*.ZIP>*.DOC; *.ZIP>*.XLS; *.ZIP>*.PDF;”. This would index only file types of *.DOC, *.XLS, and *.PDF that are inside a zip archive. For MSG or EML files, to index only certain types of attachments, the format is “*.MSG>*.DOC;*.MSG>*.PDF;”.

The settings for file inclusions are maintained in the web.config file in the following location: *C:\Program Files\FileHold Systems\Application Server\FullTextSearch*

```
<add key="IncludedFilesList"
value="*.ZIP>*.DOC;*.ZIP>*.XLS;*.ZIP>*.PDF;*.MSG>*.DOC;*.MSG>*.PDF;"
/>
```

7. ENHANCED RESETTING PASSWORDS

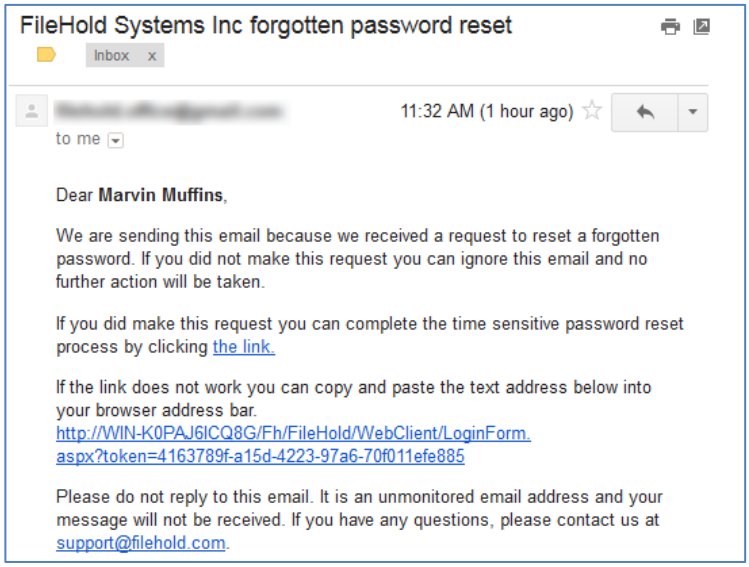
Passwords can now be reset for local users in a variety of ways:

- For individual users. Users can now request to reset their own username and/or password if it has been forgotten using a link on the FileHold login screen. A notification email containing a time-sensitive link will be sent to the user in order to reset their password.

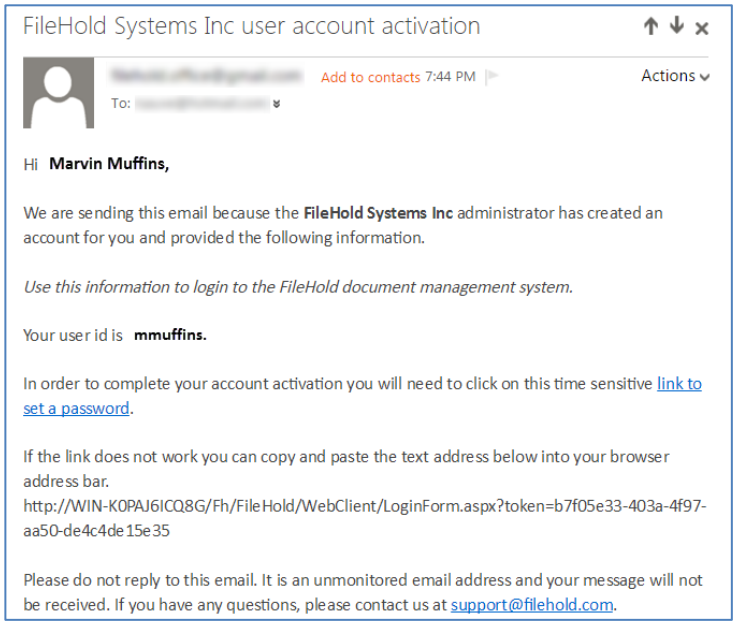
- For many users. System administrators can change user passwords en masse from the Users list page. A notification email with containing a time-sensitive link will be sent to all selected users in order to reset their password.

The emails that are delivered are time sensitive so the links in the email need to be used within the specified period of time. If the links are not used within the configured time period, the link expires and a new email will need to be sent.

The following is a sample email that is sent to end users to reset their password. Once the password is reset, it can be used to log in.

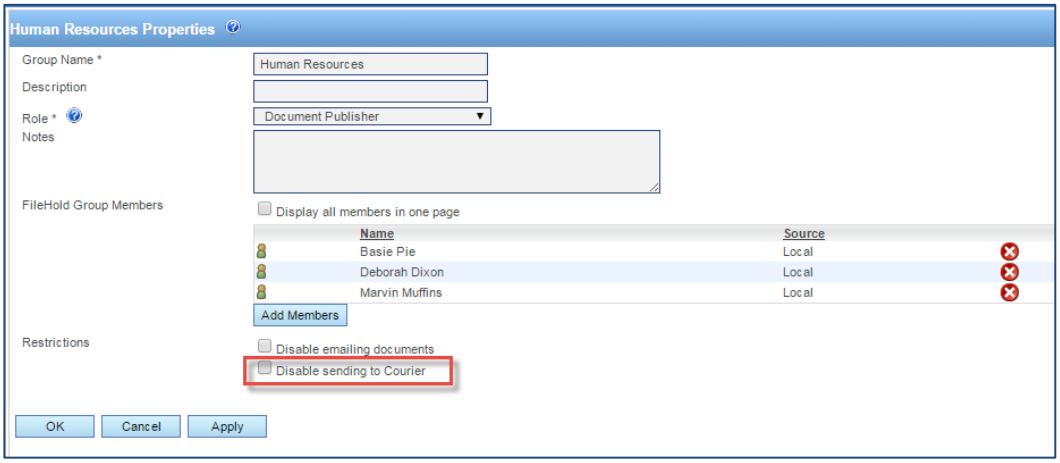


When creating a new user account, an activation email can be automatically sent to the new user providing their new user id and a link to set their password.



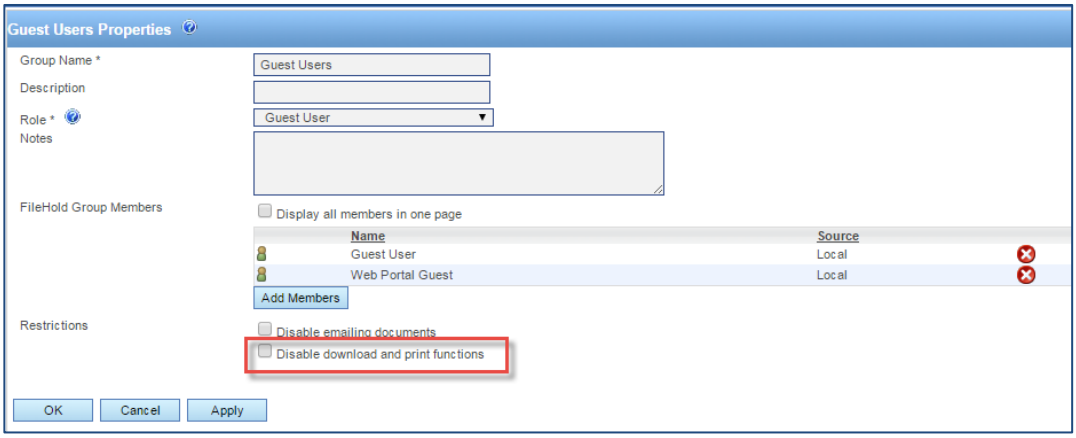
8. LIMITING FUNCTIONALITY FOR GROUP ROLES

Document publisher and higher roles can have the Courier functionality inside of FileHold restricted. If enabled, this prevents users in this group from initiating Courier transmissions.



Groups with a role of read-only or guest can have the download (Get a Copy) and print functions restricted. If these functions are restricted then the only way to view a document is through the use of a FileHold viewer. Printing functionality through the viewer is also disabled.

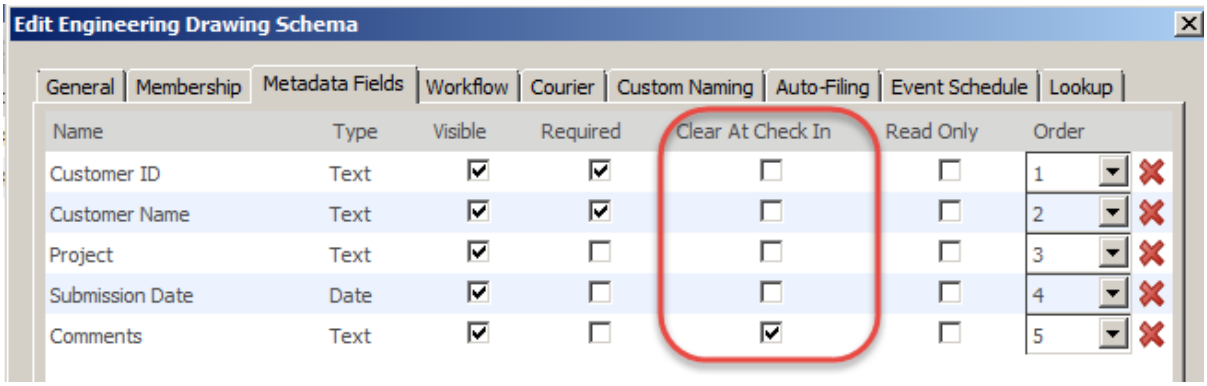
The option to restrict the email functionality for all group roles remains unchanged.



9. CLEARING METADATA VALUES AT CHECK IN

Metadata field values can now be cleared on an individual basis in a particular schema. To have the value in the field cleared upon check in, select the **Clear at Check In** check box. This feature is useful when metadata fields such as “Comments” or “Status” needs to be changed for each version.

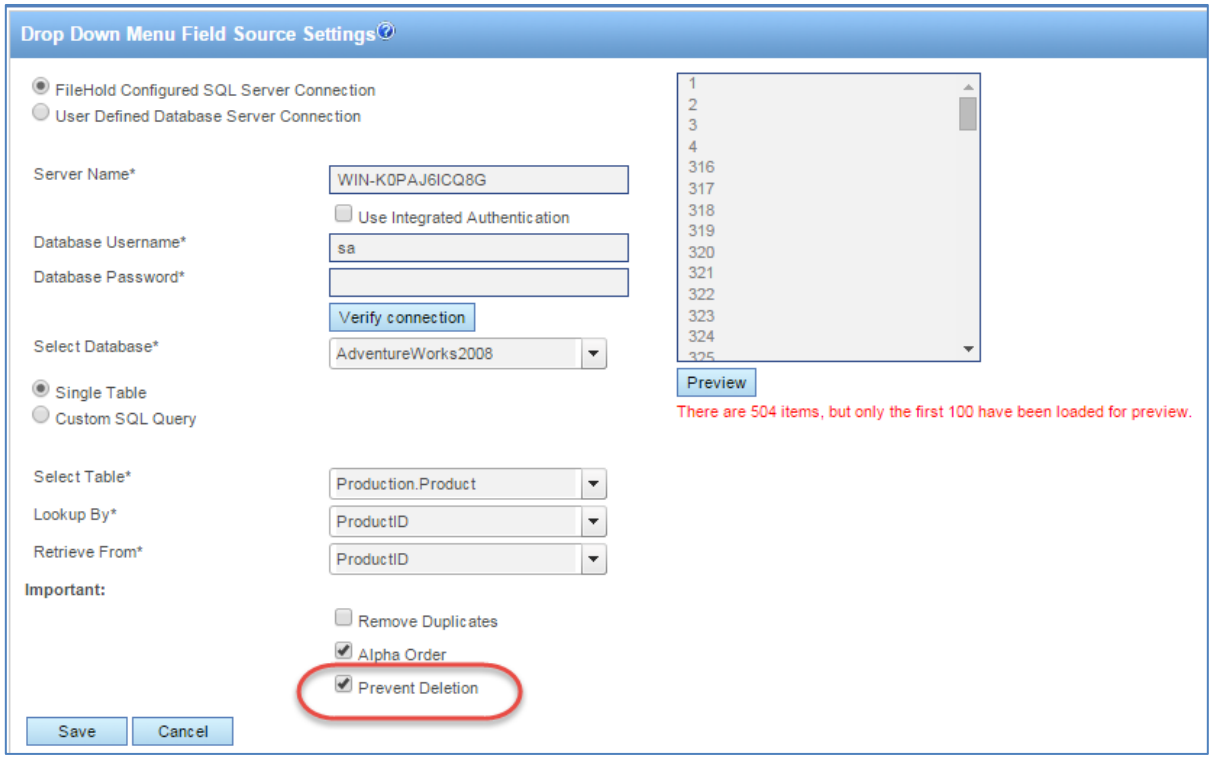
The user preference and centralized options management option “Clear required metadata fields upon Check In” is replaced by this new feature.



10. DATABASE DROP-DOWN ENHANCEMENTS

When configuring a database drop-down metadata field, a **Prevent Deletion** check box is now available so that existing values in metadata fields are never removed when enabled even when deleted from the source database.

If disabled, any values in the source database that have been deleted will also be deleted inside of FileHold when synchronization occurs. For a deletion, this means the value will be immediately removed from any metadata fields that may have been associated with the value. FileHold considers a deletion a permanent change and the original value will no longer exist anywhere in FileHold. The synchronization process runs once per hour by default.



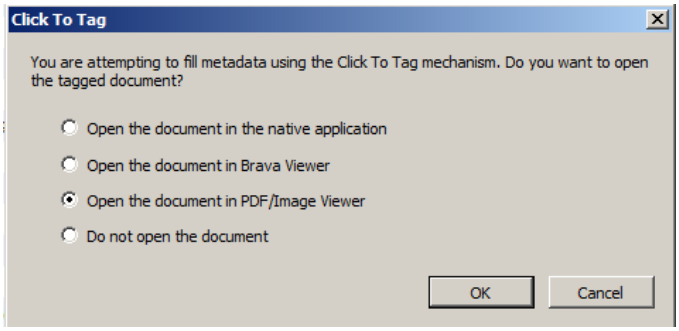
The database synchronization has also been enhanced to ignore character values in the external database that could cause failures in synchronization.

11. CLICK-TO-TAG ENHANCMENTS

Click to Tag is a method of quickly assigning metadata to a document 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 (“tagging”). The Click-to-Tag feature has been enhanced in this release so the feature is now out of beta.

Enhancements include:

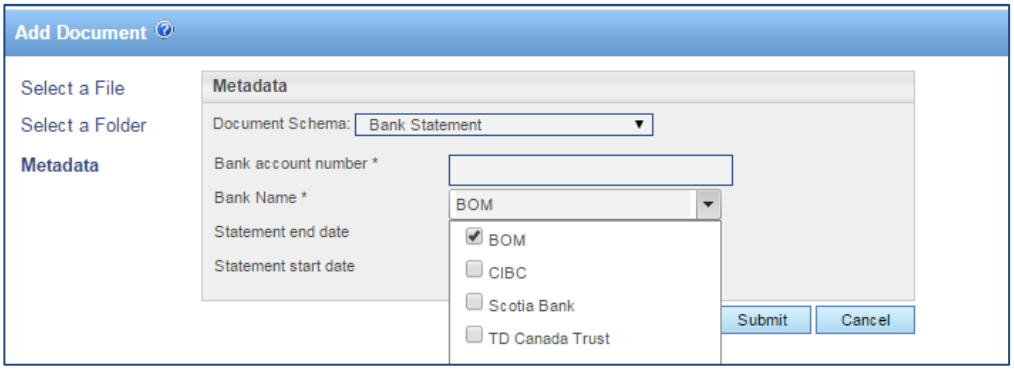
- Increasing the internal resolution of the screen before capture. This helps in capturing the text of the screen in order to tag a document.
- When using Click-to-Tag, either the Brava or PDF/Image viewer can be used to tag the documents.

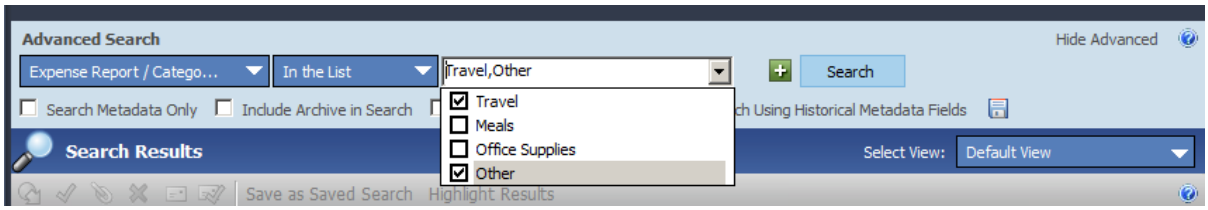


12. MULTI-SELECT DROP-DOWN LISTS CHANGE

When a drop-down metadata field is allowed to have multiple sections or when performing a search with the search operator selector set to “In the List”, check boxes now appear next to the values. The check boxes can be selected to apply those values to the metadata field.

Commas are no longer required to specify multiple selections in a drop-down list.





13. SYSTEM ACTIVITY LOG ENHANCEMENTS

The following items are now tracked in the system activity log:

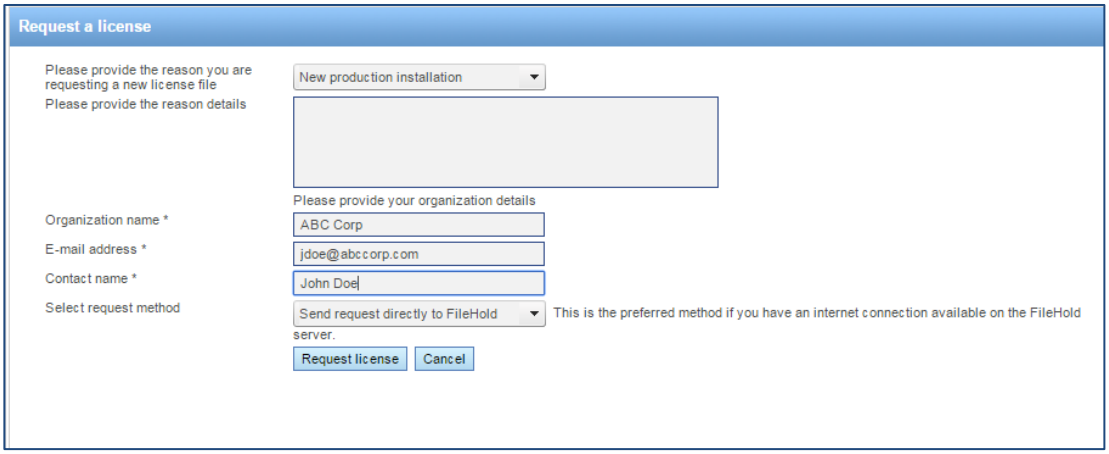
- Additional repositories are added or existing repositories are modified.
- License is updated. The unique license ID is included in the details.
- One-time licenses. When new license packs have been added, closed, locked or cancelled.

14. NEW LICENSE REQUEST METHOD

System administrators now have options when requesting a new license from FileHold in the event that one is required. Administrations can use the “Request a license” feature from the License information page. This feature makes it easy to send the correct information to FileHold and get a license issued without requests for additional information.

A new “Request a license” form is pre-filled with the organization name, email, and contact information. The reason for the new license request can be specified along with any additional details.

The options for sending the license request email include: send directly to FileHold; through an email client; or copy the request to the clipboard where you can email the contents to licensing@filehold.com via an alternate method.



15. FHIT ENHANCEMENTS

The FileHold Instrumentation Tool (FHIT) is an application that runs on the FileHold server which contains a number of utilities that help maintain the system. A few enhancements for FHIT have been made in this release.

15.1. Document Export Functionality

Documents can be exported from a cabinet, drawer, folder groups, or folders using the Export option. They can also be exported from document view such as a folder or search results. If you are exporting an entire library, you can export them through the FileHold Instrumentation Tools (FHIT).

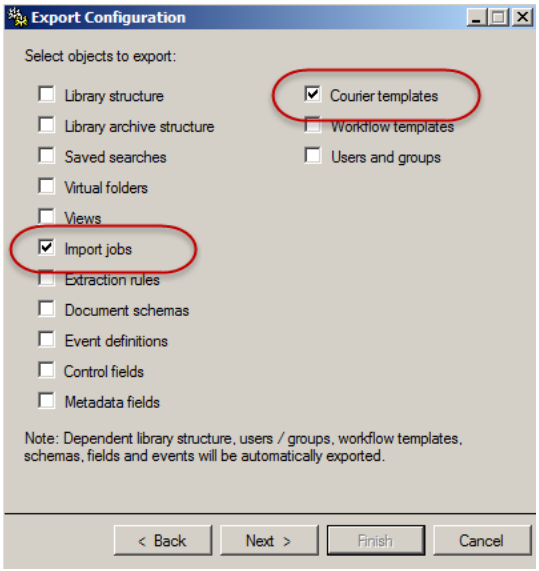
When exporting documents from any source listed above, the folder name and xml file that is generated upon export is now named with a date and timestamp appended to the end. For example: documents2015100882302.

In prior releases, the folder name and xml file were only named “documents”.

15.2. Library Export Functionality

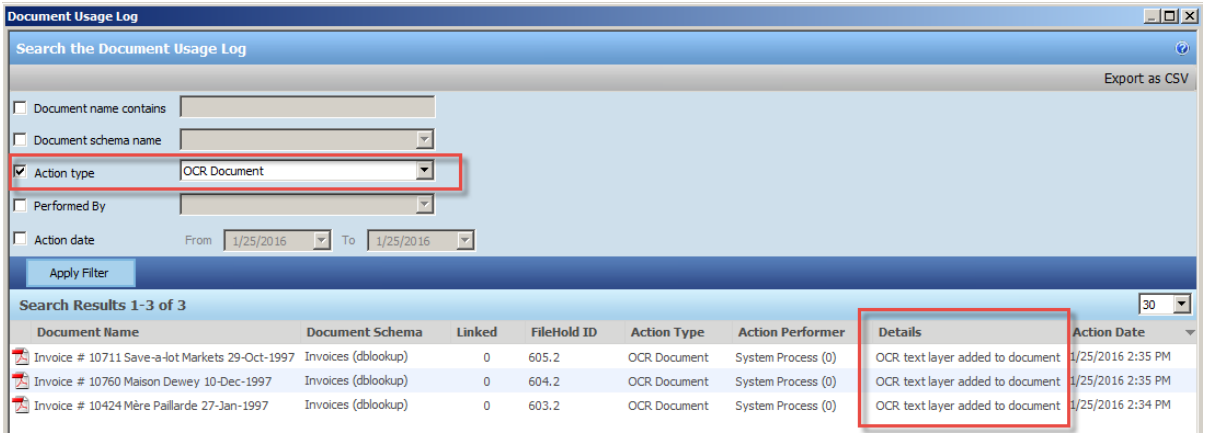
A number of items can be exported from the FileHold system which includes user and group information, schema and metadata field information, and library structure and properties. This creates an xml file containing all the library information which can then be imported into another system, such as a test server.

In this release, the library configuration export includes automatic document importation jobs and Courier templates.



16. DOCUMENT USAGE LOG ENHANCEMENT

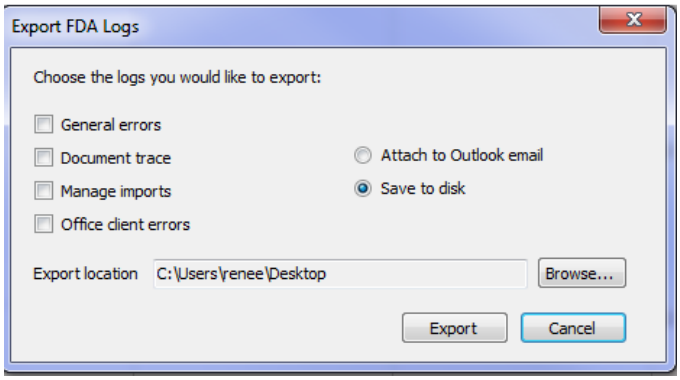
The document usage log now captures when a document version has been created using the server side optical character recognition feature. The action is “OCR Document”.



17. EXPORTING LOG FILES FROM FDA ENHANCEMENT

If a user is experiencing problems with the FileHold Desktop Application, they can export logs and use them for entering a support case in the Support Portal or emailing the FileHold support team.

The exporting of logs from the FileHold Desktop Application has been improved so that the Manage Imports log and the FileHold Office Client (Microsoft Office integration window) can be included along with the trace and error logs. The logs can also be saved to computer location or attached directly to an email (if a default email client exists).



18. DOCUMENT LINKS ENHANCEMENT

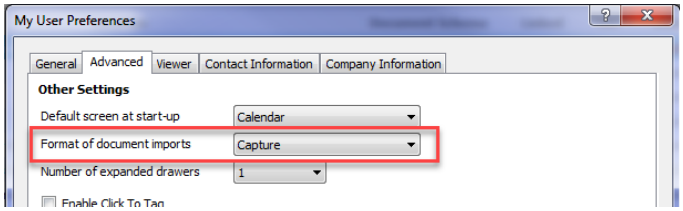
Different types of document links can be configured for the FDA, Web Client, and the guest Web Portal. These URLs can be shown in the metadata pane or included in emails as link type attachments.

The links for the Web Portal (guest portal) now support direct mode and locked direct mode:

- Direct mode opens 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 opens the document in the FileHold Web Viewer or browser (depending on the file type) 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.

19. SMARTSOFT CAPTURE INTEGRATION WITH THE FDA

When using SmartSoft Capture, the setting “Format of document imports” must be set to “Capture” in the FDA > User Preferences > Advanced tab. If you are using EMC Captiva QuickScan Pro as your scanning software, set to QuickScan Pro.



For the Managed Import functionality, when retrieving the XML file for the import, you will need to browse and select the XML file.

20. SCHEMA-BASED AUTO-FILING SCRIPT ENHANCEMENTS

The schema-based auto-filing script is a versatile script that can be used to set the destination folder for documents based on a combination of variables. In this release, the ability to use a system value has been added. Allowed system values include created date, document

schema, and document name. Multiple regular expressions can also be used. If one fails to return a non-empty string, the next one is tried and so on until the first match is found.

The following is an example of a portion of the Schema-BasedAutoFilingScript.xml file using a system field and multiple regular expressions:

```
</DocumentSchema>
    <DocumentSchema name="schemaname3">
      <Cabinet createable="true">
        <Mapping type="SystemField">
          <Field>CreatedOn</Field><!--When mapping is of SystemField
type, only following fields are allowed: CreatedOn, DocumentSchema,
DocumentName.-->
          <Properties fieldType="Date">
            <Format>yyyy MM</Format>
          </Properties>
        </Mapping>
        <Properties>
          <Owner>dddddddd-dddd-dddd-dddd-dddddddddddd</Owner>
          <Weight>0</Weight>
          <Members>
            <Member>dddddddd-dddd-dddd-dddd-dddddddddddd</Member>
          </Members>
        </Properties>
      </Cabinet>
      <Drawer>
        <Mapping type="SystemField">
          <Field>DocumentSchema</Field>
          <Properties fieldType="Text">
            <Regex search="^(.{3})-{0,1}(.{3})-{0,1}(.{3})"
replace="$1-$2-$3" /><!--It's optional-->
          </Properties>
        </Mapping>
        <Properties>
          <Weight>0</Weight>
        </Properties>
      </Drawer>
      <Folder>
        <Mapping type="SystemField">
          <Field>DocumentName</Field>
          <Properties fieldType="Text">
            <Regex search="^[ACC]{3}.*" replace="Acceptance" /><!--
Optional. There can be defined any number of Regex patterns. First
matching patter will be used.-->
            <Regex search="^[SET]{3}.*" replace="Settlement" />
          </Properties>
        </Mapping>
        <Properties>
          <Owner>dddddddd-dddd-dddd-dddd-dddddddddddd</Owner>
          <Weight>10</Weight>
          <Color>Green</Color>
          <Members inherit="true" />
        </Properties>
      </Folder>
   </DocumentSchema>
  </DocumentSchemas>
```

21. ‘DOCUMENT SCHEMA’ LABEL CONSISTENCY

The product has been modified in areas that contained the label ‘Document type’. This label has been changed to ‘Document schema’ keep the terminology consistent in the product.

22. PRINT-TO-FILEHOLD SUPPORT

Print-to-FileHold 15.0.1 is supported by Microsoft Windows 7 to 10 environments but does not support saving the Printing Preferences in the FileHold Desktop Application.

Print-to-FileHold 15.0 is supported by Microsoft Windows 7 to 8.1 environments and supports saving the Printing Preferences in the FileHold Desktop Application.

23. RESOLVED ISSUES

ID	Title
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.
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.
7359	Cannot change electronic document or record name when adding for a schema with custom naming.
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.
7371	(Workflow) Task Delegation in workflow fails when document is hidden when undergoing workflow.
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. User must first use the “Save as…” command in Excel and then check the document in.
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.
7420	(FDA) Insufficient permissions error when attempting to copy or move a file to an auto-tagged folder with a read-only metadata field.
7421	Custom name contains “EmptyCustomName#” when metadata field used in custom name is blank in select circumstances.
7421	Improperly named file after converting the file naming standard of its schema to 'Custom naming'.
7471	(FDA) Unexpected error occurred when trying to view a document in the Viewer through the Reviews & Approvals > My Workflow Tasks.
7490	(Server updater) Email/alert notifications do not work after the FileHold 14.2 server upgrade.

ID	Title
7502	(FDA) Insufficient permissions error when accessing workflow review and approval history.
7503	Change folder owner through administration panel disables auto-tagging on a folder.
7508	(WebClient) 'Auto-tagging' values set for metadata field fields were not preserved in all cases.
7514	(WebClient) Number of items configured for a folder view was not preserved upon selecting a non-default view.
7532	(FOC) Alt+L shortcut key does not work.
7541	(FDA) Unexpected error occurred when attempting to email a document as link using a “specific” version in the link.
7556	(HealthChecker) Issues found in the 'Service account' section related to the 'Log on' policies of the FH service domain account located on a Windows Server 2012 controller.
7585	(Web Client) Timeout issue when trying to access the list of unindexed files in the Full text search.
7590	(FDA) Issues found when attempting to update the values of a multi-select drop-down menu metadata field containing comma-separated menu items.
7591	(Web Client) When performing a schema lookup with a read-only metadata field, the field was populated when the lookup was performed.
7611	(Web Client) Strange system behavior observed in the list of FileHold group members when trying to add more than 25 users to a group.
7612	(FDA) Strange system behavior manifested in the list of FileHold Group members when attempting to add more than 30 users to a group.
7613	(Web Client) Incomplete list of cabinet/folder owners observed in the Change cabinet/folder/document owner pages.
7624	(FDA) Implement logging of errors when the watched folder operation fails.
7634	(Web Client) Unexpected error occurred upon clicking on the 'URL to File' link for a document set as Web Client > Direct > Specific version.
7635	(Web Client) Incorrect version of the document was downloaded or viewed with a document link set as Web Client > Direct > Specific version.
7643	(FDA) User defined document event for the actual value in its custom Date metadata field is not showing up in the Calendar.
7661	(FDA) Strange system behavior after editing a 'multiple-select' drop-down menu metadata field with numerals as menu items.
7663	(FDA) Significant slowness/non-responsiveness experienced in the Inbox when 'Drop down menu - database lookup' metadata field(s) included as column view(s) contain large dataset.

ID	Title
7669	Server Side OCR component doesn't work properly for non-Latin languages when there is no Arial Unicode MS font installed on the application server. If this font is missing, our system installer or updater should install it in the [Drive]:\Windows\Fonts directory. More information about font and licensing: http://www.microsoft.com/typography/Fonts/font.aspx?FMID=1081 http://www.fonts.com/font/monotype/arial-unicode
7691	(FDA) Inconsistent result sets when performing a search involving the 'In the List' operand.
7693	(FDA) Exception thrown during the creation of markups using the Save As > New Markup.
7714	(FDA) Loses focus on the next document in the Inbox list after renaming a document to bring it at the end of the list.
7767	It is possible to add more than the maximum allowed Registered to a FH domain group resulting in an invalid count of Registered users in the system and preventing user access to the system.
7801	When opening Outlook files from the FileHold Desktop Application, the files are not automatically removed from the working folder (typically My Documents/My FileHold) upon closing the msg file. Non-Microsoft documents are not deleted upon close because FileHold cannot detect when a user closes a document in non-Microsoft applications. Documents can be deleted when prompted to clean up the working folder upon exiting out of the FDA or using the utility Tools > Working Documents.
7816	Blank space and string configured under the Constant column in the Custom Naming pattern of a workflow template were ignored upon initiating the workflow for a document.
7818	User with a logon name containing some special characters failed to logon to the system.
7832	Actual value of a field found in the 'edit mode' of the Metadata & File Properties of a document via copy/paste was not recognized by the system.
7836	(WebClient) Cannot set the 'Repeat notification every 24 hours for tasks that are going to be overdue' option in the email notification section for a Workflow template.
7856	Drop down menu - database lookup metadata field was saved even if the required 'Lookup By' field in the Source Settings section was left blank.
7857	Insufficient permissions to edit read-only field when changing document schema.
7902	(WebClient) Cannot add a document to an 'auto-tagged' folder in a specific scenario.
7908	(FDA) Alert icon is not fully showing up when attempting to save settings in watched folders and auto-tagged folders.
7919	(HealthChecker) The "Dll files" font color shows up as 'not red' even if there was an error found in that section of the report
7927	Custom database providers cannot access databases with alternate schema retrieval methods such as for Quickbooks, DISAM, and DB2 for database lookups.
7945	(FDA) Document URLs not working properly in metadata pane and emails in the Library archive.

ID	Title
7956	Updated error message when attempting to add multiple files which is associated with a schema that is not associated with a workflow: "Adding documents to the selected workflow failed. Ensure you have permissions to modify the selected workflow and that all participants have access to the documents. When adding main documents ensure the workflow template is associated with the document schema and the workflow does not already have completed tasks."
7960	(FDA) Macro-enabled files cannot be opened in the Brava viewer.
7961	(Workflow) Exception thrown when attempting to save a workflow template with a non-integer or empty value setup for the 'Repeat notification every...' option in Web Client.
7962	(Workflow) Incorrect caption of link found in the email notification related to viewing of workflow task.
7982	(WebClient) Clicking on the '+' sign to add another criteria in Advanced search takes a significant amount of time to show up when using database drop down metadata fields.
8169	(FDA) Unexpected error thrown when assigning "non-unique" db table column to the 'Lookup By' field of a 'Drop-down menu - database lookup'.
8170	(FDA) Issue when performing a schema lookup for a document with a drop down list database lookup with allow multiple selections enabled.
8180	(FDA) Unexpected error thrown when attempting to type in a menu item value from a few thousand entries of a drop down menu metadata field.
8204	(FDA) User needs to manually select item for a "drop down menu - db lookup" in order to successfully perform a lookup.
8205	(FOC) Values set for a file's 'read-only' metadata fields were lost/changed after checking-in a new version of the document.
8208	(FDA) Advanced user preferences were lost after an upgrade to FDA15.0.
8211	(FDA) Advanced settings of existing users were not reset after changing the option values through COM in a specific scenario

24. 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.
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
7802	SQL timeout occurs when users are checking the "Email notify all folder members..." option upon adding files to a folder when the FH email server is not correctly configured.
7640	User receives an email notification for an added document even if he/she is not a member of the schema or if the document is hidden until it is approved.
7948	(ADI) Inconsistent behavior with matching values in a dropdown metadata field using the indirect metadata import related to leading or trailing spaces in values.
8042	(ADI) Duplicate documents were imported upon running the import task via command line with its scheduled task also enabled.
8046	Misleading search results related to 'Library location' when performing advanced search to include archive.
8075	(WebClient) A warning icon appears for a Text metadata field box when attempting to add a file to a folder.
8109	A system administrator cannot add main documents to an existing workflow if not participating nor observing.
8112	More details needed for files when an error is logged for duplicate or missing files in the FileHold server's event viewer such as name and location.
8115	(WebClient) When using the percentage completed filter in the Workflow Status Report, the resulting entries will never show more than one page in the statistics at the bottom right of the screen.
8119	(Courier) Search by "pending" status displays only transmissions which are associated with "Approve" templates. View only templates are ignored in the search results.
8120	(Courier) Custom portal interface has various display issues on a smartphone browser.
8121	(Courier) Exception thrown when accessing the Documents list in the Courier portal when the same metadata fields are used in the transmission details and document details in the Courier template.
8122	(FOC) The "Add email attachment to FileHold" dialog in MS Office Outlook 2007 launches intermittently when invoked.
8132	(Courier) When accessing an expired transmission, user receives error message in Courier portal.
8133	(Courier) Unable to send a transmission for a duplicate email address when source type is external.
8134	(Courier) Action buttons missing when viewing transmission status of a document involved in a transmission.
8138	(Web Client) User Activity report missing values in the version and client address columns when logging in from the menu links "Administration > Administration Panel" and "Administration > License Information" in FDA.
8199	(FHIT) Warning message appears when attempting to connect to a FileHold named instance database server.
8206	(FOC) FileHold menu items in FileHold Office Client-supported applications were not installed after performing a silent installation.
8213	(Pre-installation Health Checker) Failed to detect the permission/membership of the 'FH_Service' to the account settings if it was a member of a domain group.

ID	Title
8218	(FHIT) Cannot import FileHold15.0 library configuration if the 'Automatic Document Importation' is disabled from the server license.
8221	New string(s) for translation were not added to the resource files as they were hardcoded