RELEASE GUIDE

VERSION 15.1

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For further information about this manual or other FileHold Systems products, contact us at Suite 250 - 4664 Lougheed Highway Burnaby, BC, Canada V5C5T5, via email sales@filehold.com, our website http://www.filehold.com, or call 604-734-5653.

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1. FILEHOLD 15.1 OVERVIEW

This document is a high level description of the new features and enhancements of FileHold 15.1.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 15.1

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

2.1. Application Server Requirements

- Windows 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 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
- SQL Server 2016 (64 bit) Enterprise
- SQL Server 2016 (64 bit) Express
- SQL Server 2016 (64 bit) Standard

2.3. Web Browser Support

- Internet Explorer 11.x (32 bit and 64 bit)
- Microsoft Edge – current version

- Mozilla Firefox - current version
- Google Chrome - current version

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 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

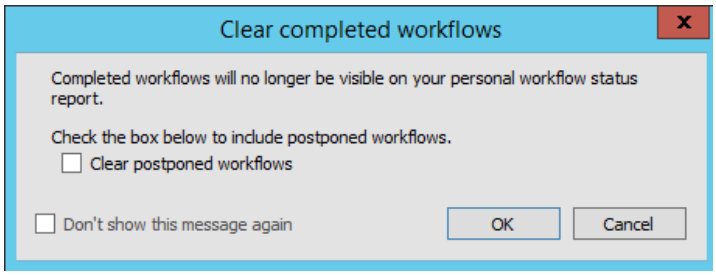
3. WORKFLOW ENHANCEMENTS

A number of workflow enhancements have been made.

3.1. Clear completed workflows

In the Workflow status report, when clearing the completed workflows, it would remove all workflows with the status of approved, reviewed, not approved, or approval postponed. There may be some cases in which workflows with a status of "approval postponed' should not be cleared.

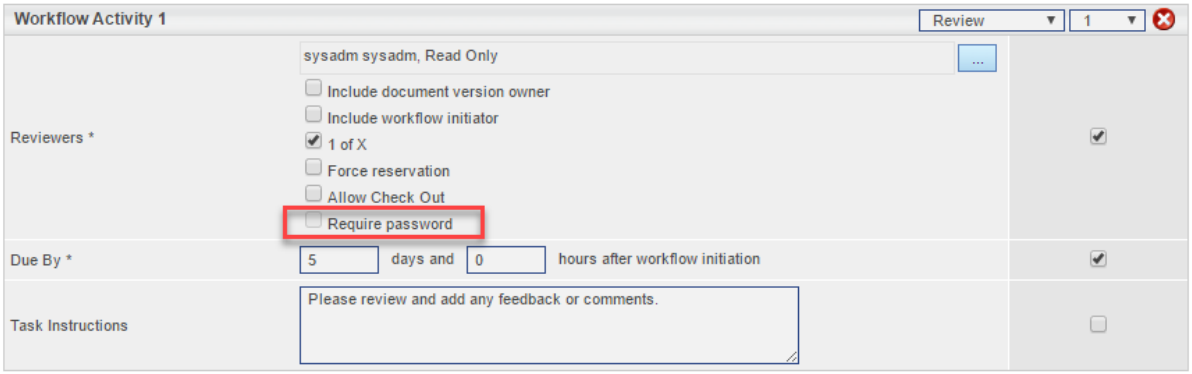
In this release, users are now prompted with a message when clearing completed workflows. They are asked if they want to clear workflows with a status of "approval postponed". The user can choose to remove or not remove them from the workflow status report.



3.2. Optional electronic signatures (passwords) for reviews and approvals

Some customers do not have strict requirements for electronic signatures for approval activities in a workflow. A new permission setting called "Enable optional passwords in workflow templates" is available that makes the requirement to enter a password for review or approval activities optional. If the permission setting is enabled, the option to require a password on the workflow template is enabled. If the "Require Password" check box is enabled on the workflow template, then participants in the workflow will be required to enter their password upon review or approval. If the "Require Password" check box is not enabled on the template, then participants in the workflow are not required to enter their passwords for review or approval activities.

If the permission setting is disabled, then the password requirement for review and approval activities does not change. In other words, the passwords requirement works the same way as for previous versions of FileHold — with review activities having no password requirement and approval activities having a password requirement. By default, this permission setting is disabled.



3.3. Library audit log and System audit log workflow logging

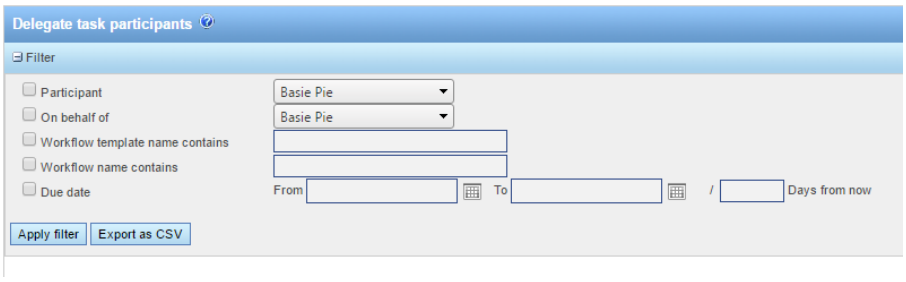
The Library audit log now contains a link to download the workflow template definition in XML format for new or modified workflow templates. This will log any changes made to the workflow templates.

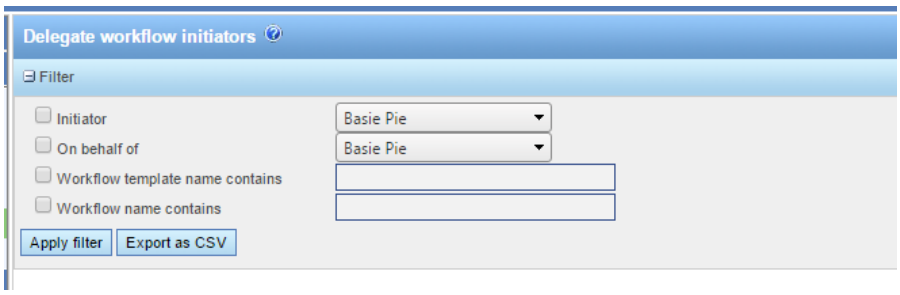
The System audit log will record if the permission setting “Enable optional passwords in workflow templates” is enabled or disabled.

3.4. Task delegation and restoration for participants and initiators

If an employee goes on leave or exits the company, several workflow tasks may need to be delegated en masse. This can be accomplished from the Workflow Delegation menu in the Administration panel. You can delegate both workflow participants and workflow initiators.

Both participants and initiators can be restored to their original owners in the event that the user comes back, such as from holidays, and needs to resume their duties.

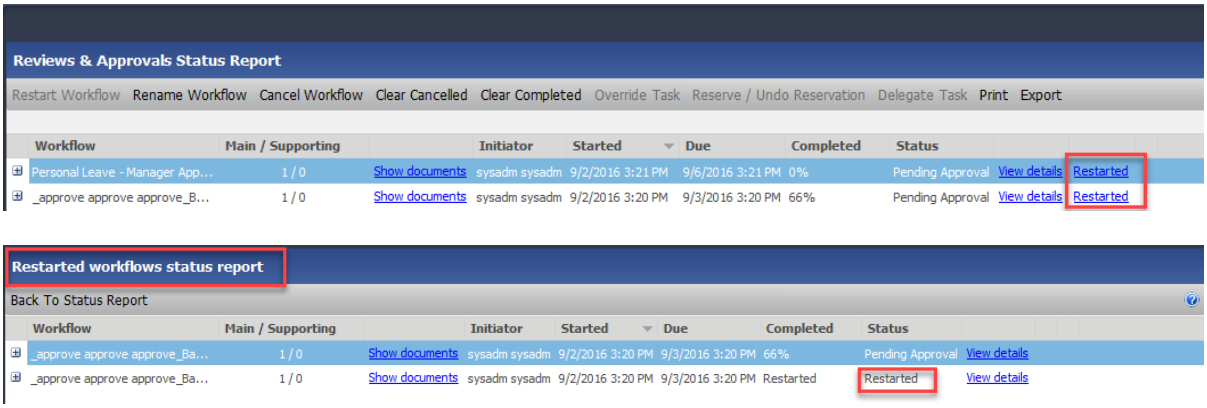




3.5. Restarted Workflows

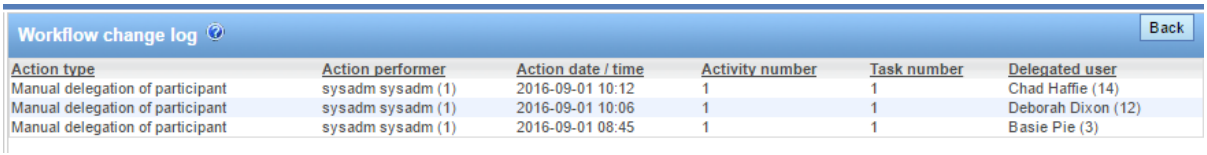
The history of restarted workflows are now viewed in the Restarted workflows status report. In previous versions, the restarted workflows were viewed directly in the workflow status report and the restarted details were contained in the Description field of the restarted workflow template.

The Restarted workflows status report is accessed through the workflow status report using the Restarted link. From here, the details of any previously restarted workflows can be viewed.



3.6. Workflow change log

The workflow change log now keeps a record of the changes made to the workflow process such as delegating, restoring, restarting, overriding, and cancelling. This is accessed through a Changes link in the workflow status report (both participant and administration) of the Web Client.



3.7. Task selection is remembered

In the FDA, when tasks are selected in the My Tasks list or Workflow status report the selection will now remain selected until the user changes it. The exception is in the Task list when a task is completed and removed from the list.

In previous versions, the Task list selection would be cleared each time the task list was refreshed. The Workflow status report would lose task selection when using the Show documents link or View details link.

4. COURIER ENHANCEMENTS

Some minor enhancements were made to Courier:

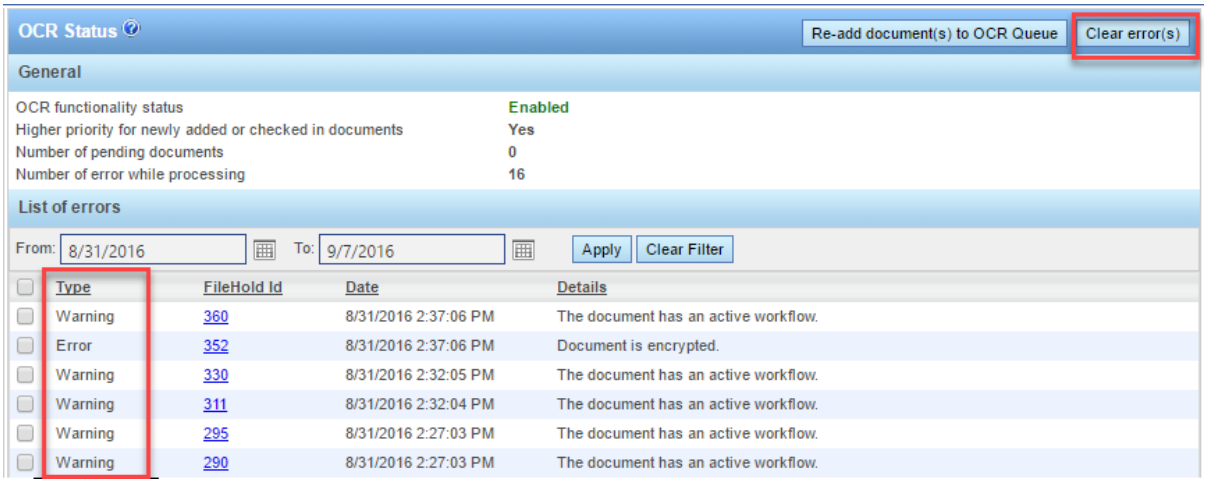
- Suspend document viewing — The ability to view documents in the Courier portal can now be controlled in the Courier transmission report. The visibility for a document can be “suspended” or “enabled. When suspending, this removes viewing access from the document in the portal.

- Rename one-time licenses — One-time licenses have now been renamed to simply “Courier licenses”.
- Show/hide transmission button — When hiding the transmission details, the button is now called “Hide” instead of “Hide transmission details”.

5. SERVER SIDE OCR ENHANCEMENTS

Two new enhancements were made to the server side OCR feature:

- Issues are now shown as errors or warnings. In previous versions, there was no distinction. Errors are technical or permanent issues that typically cannot be resolved by re-adding documents to the queue. Warnings, such as documents under a workflow or checked out, can typically be resolved by re-adding those documents to the OCR queue.
- You can now clear any OCR errors from the list. This feature was not available previously.



6. 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	(Web Client) 'Auto-tagging' values set for metadata field fields were not preserved in all cases.
7514	(Web Client) 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	(Web Client) 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	(Web Client) 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	(Web Client) 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" database 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
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.
8046	Misleading search results related to 'Library location' when performing advanced search to include archive.
8075	(Web Client) 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 an error is logged for duplicate or missing files
8119	(Courier) Search by “pending” status displays only transmissions which are associated with “Approve” templates. View only templates are ignored in the search results.
8122	(FOC) The "Add email attachment to FileHold" dialog in MS Office Outlook 2007 launches intermittently when invoked.
8199	(FHIT) Warning message appears when attempting to connect to a FileHold named instance database server.

ID	Title
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.
8218	(FHIT) Cannot import FileHold15.0 library configuration if the 'Automatic Document Importation' is disabled from the server license.
8223	(FDA) Dragging and dropping a single file directly to the Recent Folders list brings the user to the Inbox list instead of remaining in the folder and opening the metadata pane.
8227	User cannot log into FileHold when assigned to more than 35 groups.
8235	(FHIT) Courier "FHAppPoolV4" was not reconfigured after changing FH service password or changing the FH service account through FHIT.
8243	(Workflow) The My Tasks list is fixed to 5 rows in the Web Client despite the database being set to 30 rows.
8245	(FOC) Add to FileHold button is unavailable for adding attachments from in a limited number of versions of Microsoft Outlook 2016.
8257	(FDA) Strange system behavior when attempting to add a document associated with a 'multi-select' drop down menu field in a specific scenario.

7. KNOWN ISSUES

ID	Title
5084	FileHold Office Client issue related to a 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.
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.
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.
8221	A small amount of new text cannot be translated in a language pack.
8273	(Workflow) Slow response time when clicking the ‘Show documents’ link in the My Tasks list or Workflow Status report for large (over two million) document libraries.

ID	Title
8281	Select all for delegate task participants or workflow initiators selects all items on the shown page only.