RELEASE GUIDE

VERSION 16.0

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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 16.0 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 16.0.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 16.0

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 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)
- Windows 2016 Standard Edition Server (64 bit)
- Windows 2016 Datacenter Edition (64 bit)

2.2. Database Server

- SQL Server 2008 R2 (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
- Safari – current version on Mac

2.4. Active Directory Integration

Tested with the Active Directory basic functional set that ships with our supported Windows Server versions. Other versions may also be supported. Contact sales@filehold.com for more information.

Used to synchronize the user authentication system with Microsoft Active Directory and authenticate users against a domain. Users from multiple active directory domains can be synchronized with FileHold with up to one OU per domain.

2.5. 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

2.6. Microsoft Office Support

- Microsoft Office Professional 2007 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio) with SP2 (SP3 recommended)
- 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)

2.7. 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)

2.8. Mobile Platforms Support

- iOS – current version
- Android – current version

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.

2.9. WebCap Support

- Internet Explorer 11.x
- Mozilla Firefox – current version
- Google Chrome – current version

2.10. 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. ASSEMBLING DOCUMENTS

The assemble documents feature can be used to automatically construct new PDF documents based on the rules set in the assembly configuration.

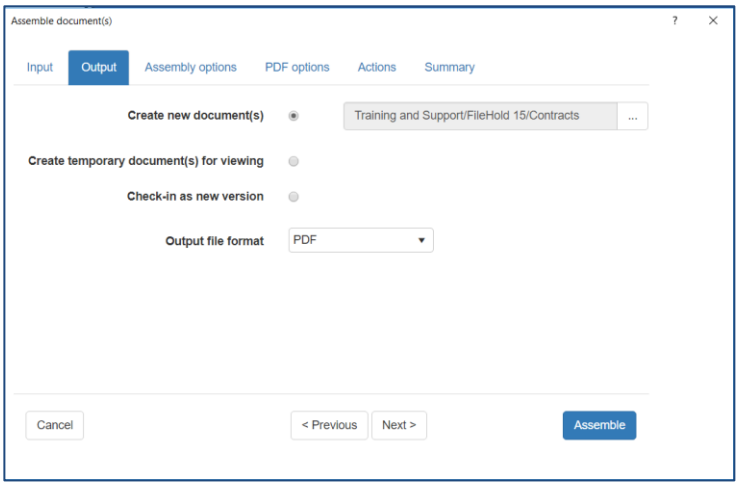
A user must have a FileHold viewer level 2 license in order to use the assemble documents feature. This feature is only available in the FileHold Desktop Application (FDA). The file types that are supported are: docx, doc, docm, dot, dotm, dotx, rtf, txt, pdf, svg, emf, wmf, gif, cut, dds, dib, dicom, exif, exr, fax, g3, hdr, iff, ico, j2k, j2c, jb2, jbig2, jif, jfif, jng, jp2, jpeg, jpg, jpe, koa, lbm, mng, pbm, pcd, pct, pict, pic, pcx, pfm, pgm, psd, png, pnm, ppm, ras, rle, sgi, tga, targa, tiff, tif, wbmp, wap, wbm, xbm, xpm, 3fr, arw, bay, bmq, cap, cine, cr2, crw, cs1, dc2, dcr, drf, dsc, dng, erf, fff, hdr, ia, iiq, kc2, k25, kdc, mdc, mef, mos, mrw, nef, nrw, orf, pef, ptx, pxn, qtk, raf, raw, rdc, rw2, rw1, rwz, sr2, srf, srw, sti, xml, fopc, odt, ott, mobi, htm, html, mhtml, mht, xhtml, xht. You can mix any file types to assemble the documents; they do not have to be the same format.

Tags can be strategically placed within a Microsoft Word document to insert information into the assembled PDF document (similar to the workflow “convert to PDF” feature). Information such as metadata field values, system information, and workflow information can be inserted into the newly generated document.

With the assemble documents feature you can:

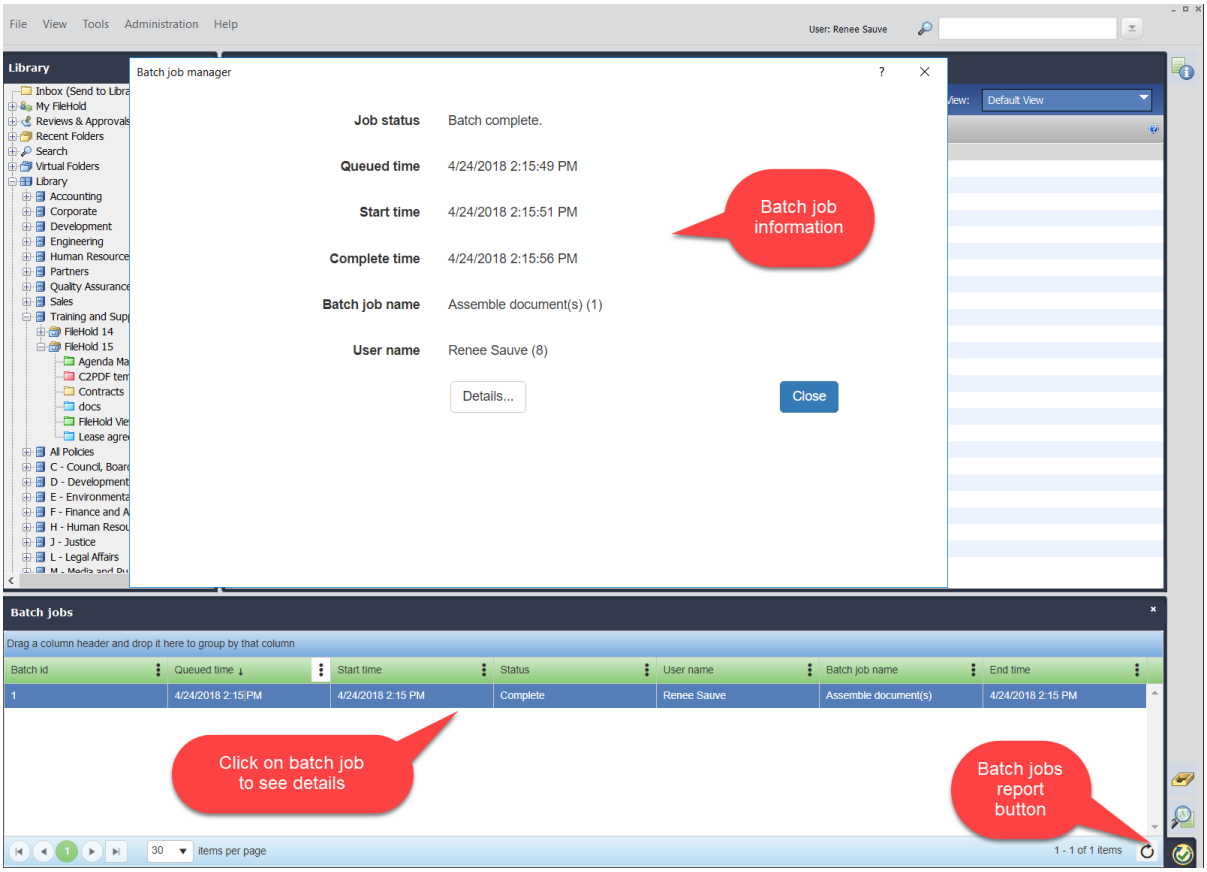
- Create standalone documents
- Merge documents together
- Append and prepend documents
- Use converter templates to populate certain field information (similar to the workflow “covert to PDF” feature)
- Output documents to PDF, PDF/A-1A, or PDF/A-1B
- Order the documents for assembly
- Rename the newly assembled document
- Create new documents for the FileHold library
- Check in as new version of an existing document

- Create a temporary document for viewing
- Apply PDF security options
- View the assembled document in the FileHold viewer post-assembly
- Initiate a workflow post-assembly
- Initiate a Courier transmission post-assembly



Once the job has completed, the user receives an “Assemble documents batch job ready” email with links to the batch job details or open the document in the viewer if the option was enabled in the job settings.

Users can see their jobs in the Batch jobs report in the FileHold Desktop Application or in the Web Client. The batch jobs report can be modified to add or remove columns, resize or change the order of the columns, sort ascending or descending, filter the results, and save these different views. The displayed information can be exported out of the system in order to do further analysis on user accounts.



4. FILEHOLD VIEWERS

The FileHold level 1 and 2 viewers allow users to view files in both the Web Client and FileHold Desktop Application (FDA).

The following file formats are now supported by the level 1 and 2 viewers:

docx, rtf, txt, pdf, svg, emf, wmf, docx, rtf, txt, gif, cut, dds, dib, dicom, exif, exr, fax, g3, hdr, iff, ico, j2k, j2c, jb2, jbig2, jif, jfif, jng, jp2, jpeg, jpg, jpe, koa, lbm, mng, pbm, pcd, pct, pict, pic, pcx, pfm, pgm, psd, png, pnm, ppm, ras, rle, sgi, tga, targa, tiff, tif, wbmp, wap, wbm, xbm, xpm, 3fr, arw, bay, bmq, cap, cine, cr2, crw, cs1, dc2, dcr, drf, dsc, dng, erf, fff, hdr, ia, iiq, kc2, k25, kdc, mdc, mef, mos, mrw, nef, nrw, orf, pef, ptx, pxn, qtk, raf, raw, rdc, rw2, rw1, rwz, sr2, srf, srw, sti.

The level 1 viewer uses low fidelity rendering for docx, rtf, and txt files.

The level 2 viewer supports all the formats listed above plus: doc, docm, dot, dotm, dotx, xml, fopc, odt, ott, mobi, htm, html, mhtml, mht, xhtml, xht. This viewer uses high fidelity rendering for docx, rtf, and txt files. This means documents are converted to PDF format before being displayed in the viewer.

See the table below for features that are supported by the level 1 and level 2 viewers.

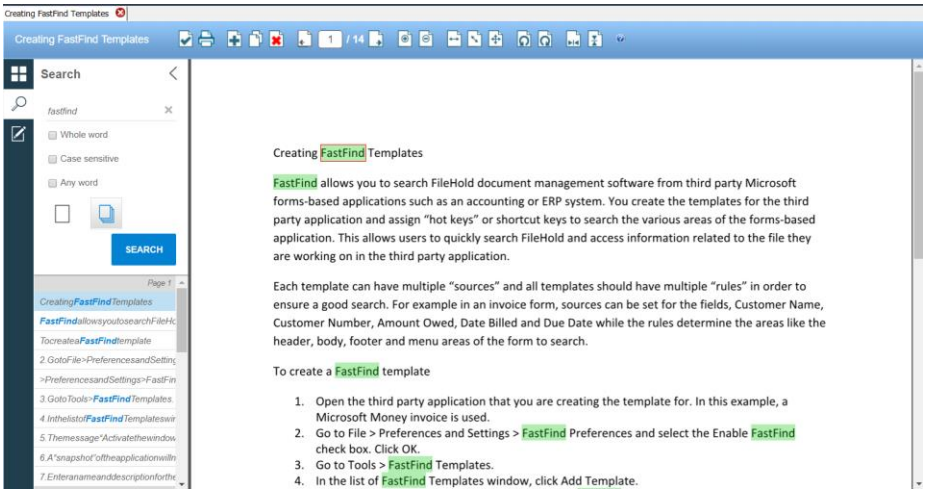
Feature	Level 1	Level 2
Open multiple documents	X	X
Publish document to local computer	X	X

Feature	Level 1	Level 2
Publish document to FileHold	X	X
Print document	X	X
Automatically open documents in folders and search results	X	X
Basic annotations and markup		X
Search and highlight search results *NEW	X	X
High fidelity rendering *NEW		X
Manipulate pages *NEW	X (limited to PDF and image files)	X (all supported file types)
Document assembly *NEW		X

4.1. Highlight search results

The FileHold viewers 1 and 2 can now display the search terms highlighted within searchable documents. Searches can be conducted from the FileHold library search or using the Search pane directly in the FileHold viewer. Search results are highlighted in green.

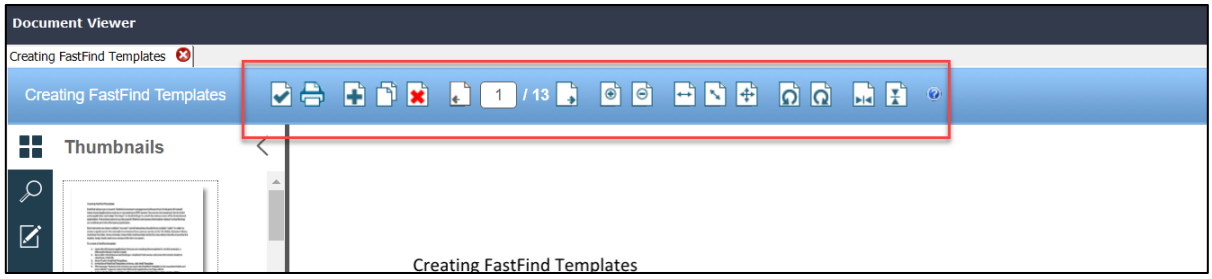
In the Search pane, whole word and case-sensitive options are available. Searches can be done in current page only or in the entire document.



4.2. Page Manipulation

Pages in a document can now be manipulated further such as adding, deleting, copying, dragging and dropping pages, rotating, and flipping in the FileHold viewers level 1 and 2.

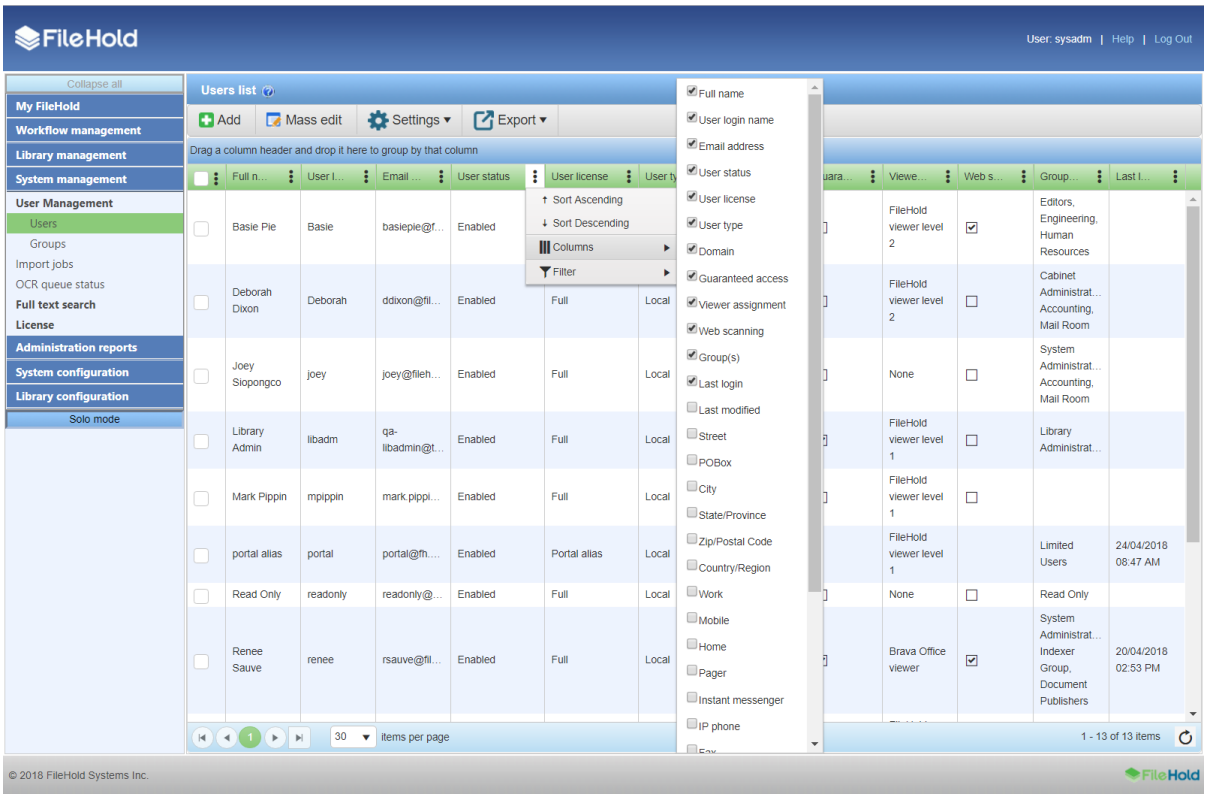
Level 1 viewer page manipulation is limited to only PDF and image files. Level 2 viewer supports additional file types for page manipulation: PDF, image, docx, rtf, and txt files.



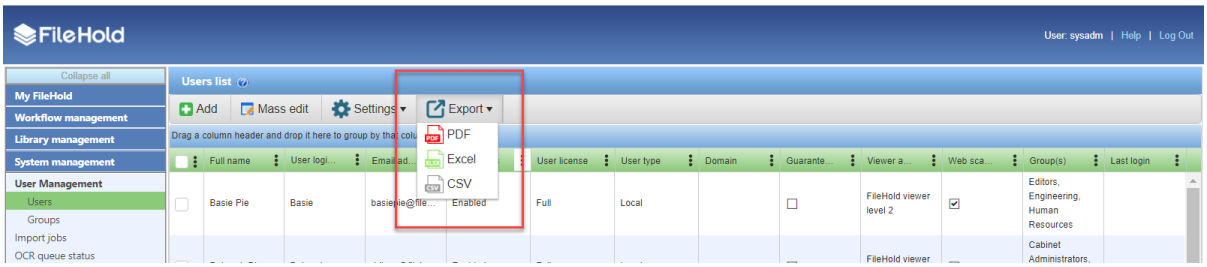
5. USER ACCOUNTS

5.1. New Users List

A new Users list has been implemented in the new style of report. It can now be modified to add or remove columns, resize or change the order of the columns, sort ascending or descending, filter the results, and save these different views. Any specially created views can be saved and reused using the Settings.

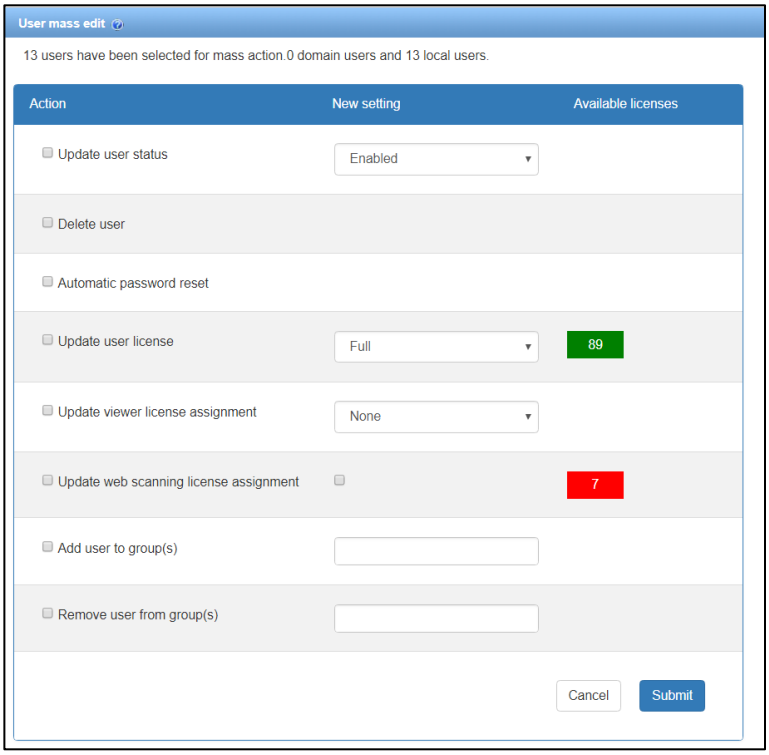


The displayed information can be exported out of the system in order to do further analysis on user accounts in CSV, PDF, or Microsoft Excel format.

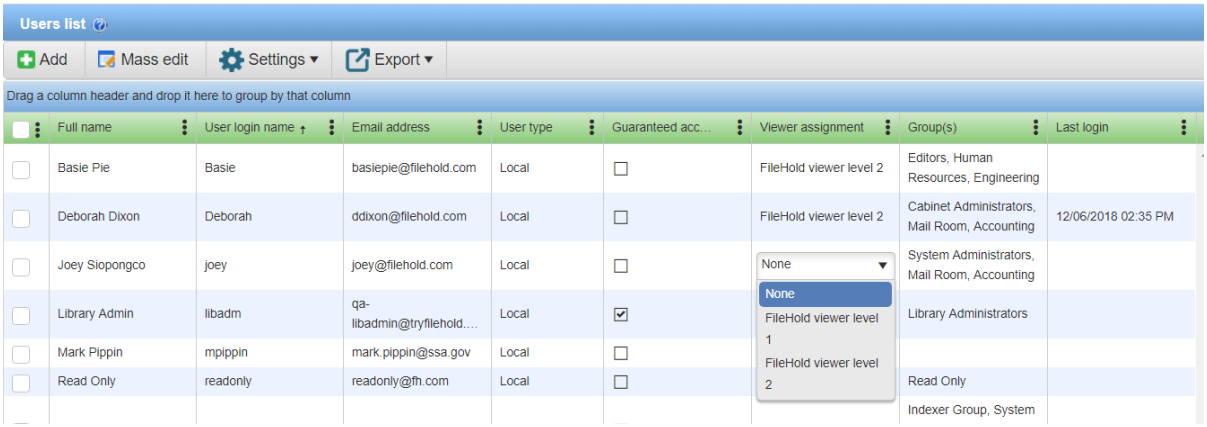


The mass edit screen allows you to mass update a user status, delete local users, reset passwords, change user license, change viewer license, update web scanning license, and add or remove users to groups. In order to make mass updates, users must first be selected on the Users page. Use the check boxes or the **Shift** or **Ctrl** keys on your keyboard to select multiple users or select the top-level check box in the check box (ID) column to select all users.

The number of licenses available are displayed in green. If there are not enough licenses to update all the selected users, the number is displayed in red. In this case, you will not be able to update the user accounts.



Edits to some user properties can also be made directly in the grid. Simply click on the cell to change the value.



5.2. User Licenses and Session Changes

User license types are now categorized as Full, Limited Registered, or Portal alias users. In previous versions, these were not separated as unique user license types and made it difficult to distinguish between regular users and, using the former moniker, “guest users”.

- A Full user license (formerly known as registered users) is a user that has been assigned to a group with a role of read-only or higher. Full users consume the full concurrent sessions (formerly known as concurrent sessions).
- A Limited Registered user is a user that can only be assigned to a group with a role of “Limited” (formerly known as the “Guest” role). A single limited registered user account can be used by a single user or shared amongst many people. Limited registered users consume the limited concurrent sessions (formerly known as guest sessions).
- A Portal alias user is a user that can only be assigned to a group with the role of “Limited” (formerly known as the “Guest” role) and is used in conjunction with the Anonymous portal (formerly known as the “Guest” or “Self-service” portal). Portal alias users consume the limited concurrent sessions (formerly known as guest sessions).

See the next section “Guest Users” and “Guest Portal” Changes for more information on “guest user” changes.

6. “GUEST USERS” AND “GUEST PORTAL” CHANGES

In previous versions, the concept of “guest users” and the “guest portal” was a source of confusion for many system administrators. There were no settings to create and manage guest users but rather it used a normal registered user license where certain conditions were applied. The process for creating guest users and the guest portal has now been streamlined and terminology has been updated.

6.1. “Guest” Changes

Now when creating “guest users”, users will be required to specify a user license type:

- Limited registered users
- Portal alias users.

See User Licenses and Session Changes for more information on the new user license types.

With this enhancement, new terminology for “guest” name changes include:

FileHold 15.2 and lower versions	FileHold 16.0
Guest role	Limited role
Guest registered user	Limited registered user
Guest session	Limited concurrent session
Guest portal	Anonymous portal
Guest user account needed for guest portal	Portal alias user

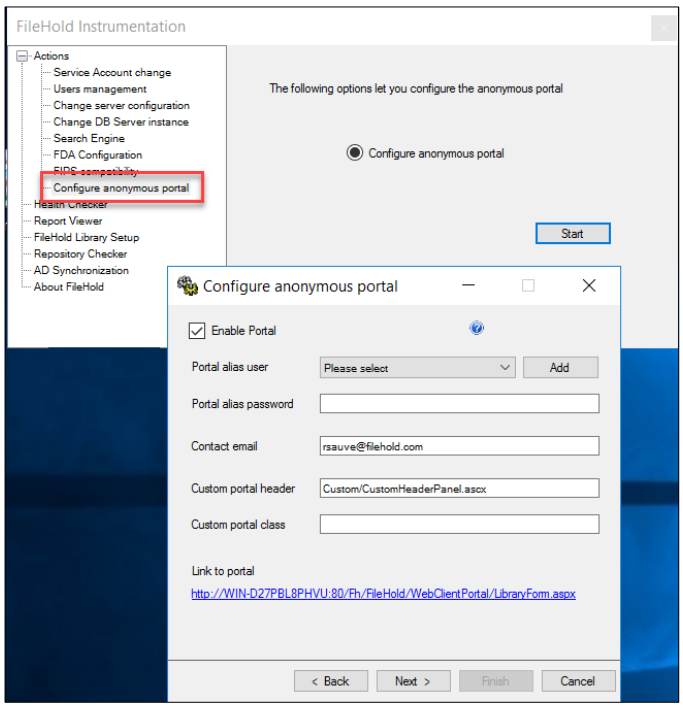
Limited registered and portal alias user accounts can only be assigned to a group with the role of “Limited”. Both limited registered and portal alias user accounts consume limited concurrent sessions. Limited concurrent sessions are used as a cost-effective method for users to access documents in the library in a limited way.

When upgrading, FileHold will manage the conversion process from guest users and guest roles to limited registered or portal alias users and limited roles.

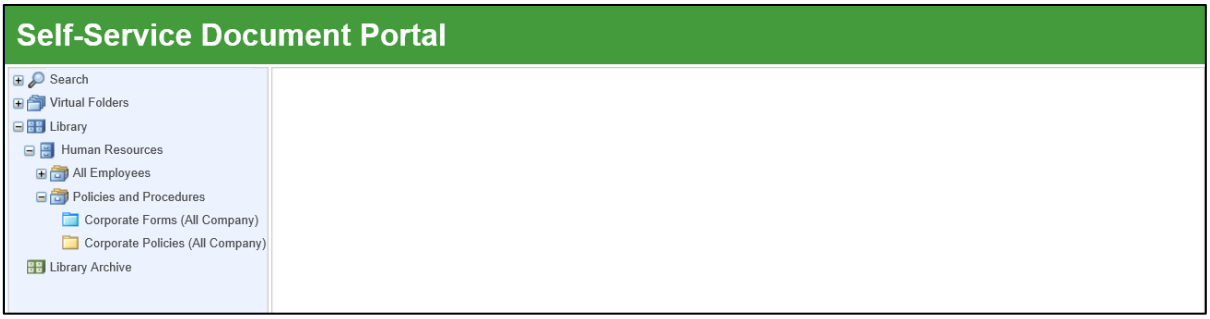
6.2. Anonymous Portal Creation

The Anonymous portal (formerly known as the guest portal), can now be created through a wizard using the FileHold Instrumentation Tools (FHIT). This makes the portal setup and configuration substantially easier for our customers.

A Portal alias user account must be set up in order to configure the Anonymous portal. A custom portal header and custom portal class can be entered for a custom look.



The default header for the Anonymous portal has been changed to “Self-Service Document Portal”. This can be modified through the custom portal header settings.



7. WORKFLOW

7.1. External signatures with Adobe Sign

The new integration provides a method to use Adobe Sign as a part of a FileHold workflow with documents stored in FileHold. This custom feature is dependent on the customer contracting directly with Adobe for their e-signature services.

When one or more documents, such as a contract, needs to be signed, they are sent to Adobe Sign from a FileHold workflow task. The documents can be sent to Adobe Sign with multiple recipients including internal and external signers, and CC'd users. A message and an expiration date for the signature can be included in the Adobe agreement. The sender has the opportunity to correct any errors in the signing fields from the Adobe Sign authoring area prior to sending the document.

Once the document has been sent to Adobe Sign, Adobe will send an email notification with a link to Adobe Document Cloud / eSign Services to the recipients. Once the contract is signed, Adobe will automatically send the signed documents to the FileHold server. These signed documents will be checked in as new versions of the originals. The workflow task is automatically completed once the signature is received so there are no additional steps for the sender.

FileHold provides a report of the Adobe Sign transmissions where issues can be reconciled or documents can be synchronized with Adobe if there was a communication problem. FileHold also provides a log that can be monitored if there were any technical issues. The FileHold server must be accessible by the Adobe server in order to update the signed documents.

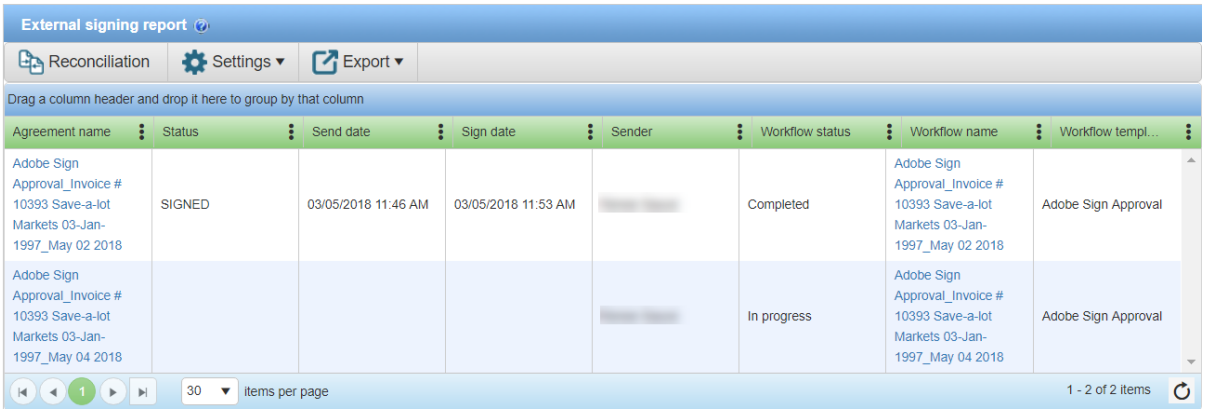
7.2. External signing report

The External signing report displays a list of Adobe Sign transmissions. The report uses the new style of reporting where columns can be added or removed, resized, reordered, grouped, and filtered. The view settings can be saved and exported to a CSV, XLSX, or PDF format.

From this report, items such as the agreement name, status, send date, sender, workflow status, and workflow name are displayed. The list of signers and their instructions plus any other changes made by the author can be accessed via the Agreement name link. The Agreement ID link provides a downloadable PDF document with the history of the transmission. The Workflow name links to the Workflow status report.

The agreement status can be manually reconciled with Adobe Sign in the event that the signature process has completed and not returned to FileHold.

The report is accessible through the “Adobe Sign” participant link in the workflow status report, the Sign off sheet, or via the Web Client > Full Administration Panel > Workflow management > External signing report.



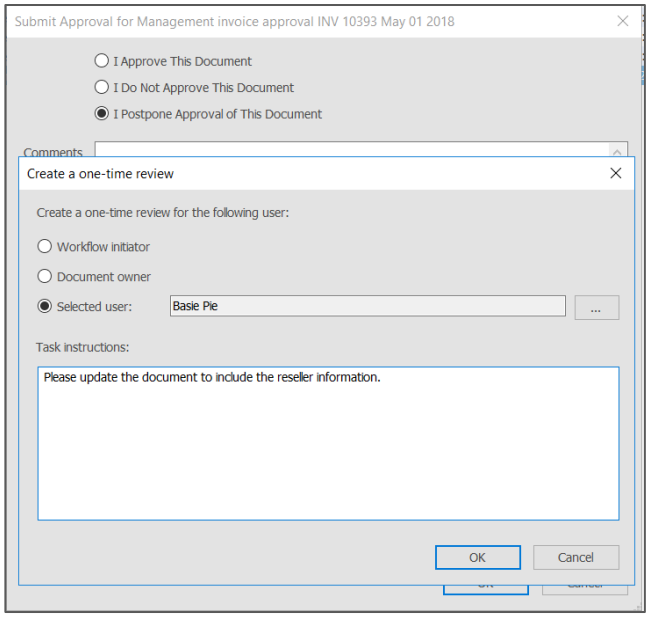
7.3. One-time review activity

A new activity called “one-time review” allows a user to insert a review task ad hoc during a workflow process. The new one-time review activity automatically restarts the workflow with the new activity inserted in the tasks. This allows a workflow participant to request changes from any user ad hoc before they complete their own task.

When a user selects the “postpone approval” option, they are prompted to select the user to complete the one-time review activity and include any task instructions. The one-time review activity participant must have read or higher access to the main and supporting documents in the workflow.

The workflow is restarted and new “one-time review” activity is inserted in the workflow immediately before the current activity. Any previously completed activities are copied over into the restarted workflow. The one-time activity participant is sent the workflow task. Check out is enabled for one-time review activities and the due date matches the due date for the source activity; this may mean the new activity is overdue before it is started. A password will not be required to complete the one-time activity. All following activities will be adjusted accordingly to accommodate automatic restarts, etc. The new activity will appear in the workflow status report as “one-time review”.

Workflow templates support up to 20 predefined activities at initiation time plus up to 40 one-time review activities for a total of 60 activities.



7.4. Workflow status report

New activity types have been added to the workflow status report:

- One-time review activity
- Send for external signature. This activity type cannot be overridden.
- Wait for external signature. This activity type cannot be restarted or overridden. The participant “Adobe Sign” links to the External signing report to view the list of signers and their instructions.

If a workflow is cancelled while waiting for an external signature, the Adobe Sign API is called to cancel the signing.

New status types have also been added:

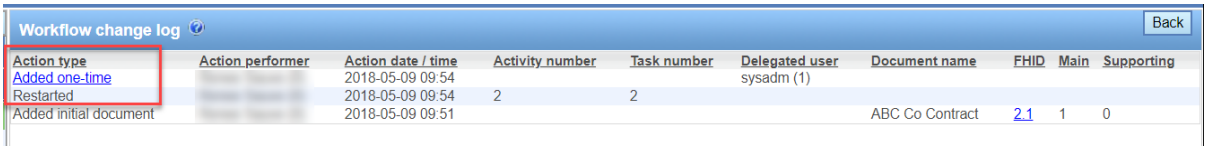
- Sent (for Adobe Sign signature)
- Signed (Adobe Sign)

7.5. Workflow change log

The following columns have been added to the workflow change log:

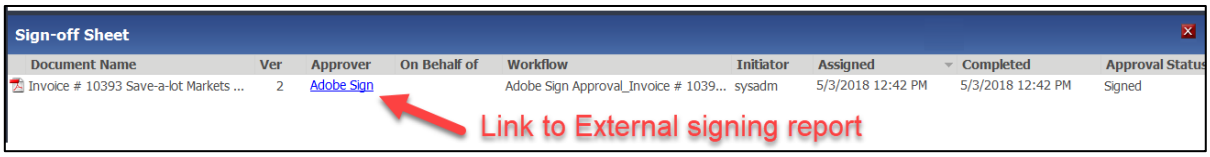
- Document name — This is the name of the document version related to the document change action
- FHID — The FHID related to the document change action and is linked to the document.
- Main — The number of main documents following the document change action.
- Supporting — The number of supporting documents following the document change action.

If a one-time review activity is added to a workflow, the Workflow change log records that the workflow was restarted and a one-time activity was added. A link takes you to the one-time review activity details: the one-time review activity participant and the task instructions.



7.6. Sign off sheet

The sign-off sheet includes “Adobe Sign” as a signer where an external signature has been completed. The “Adobe Sign” name is linked to the External signing report.



7.7. Workflow PDF converter templates

The default format of the tags has been changed from:

```
{{<type>;<name>[;<format>[;<nullreplacement>]]}}
```

To:

```
[[<type>|<name>[|<format>[|<nullreplacement>]]]
```

A date field can now be offset by a period of time in the past or the present. For example, users want to see the renewal date of a contract start 12 months after the contract start date. Both system and metadata field dates can be used. Negative numbers can also be used to show dates back in time.

Where:

```
DateOffset(<fieldname>,<yearoffset>,<monthoffset>,<dayoffset>)
```

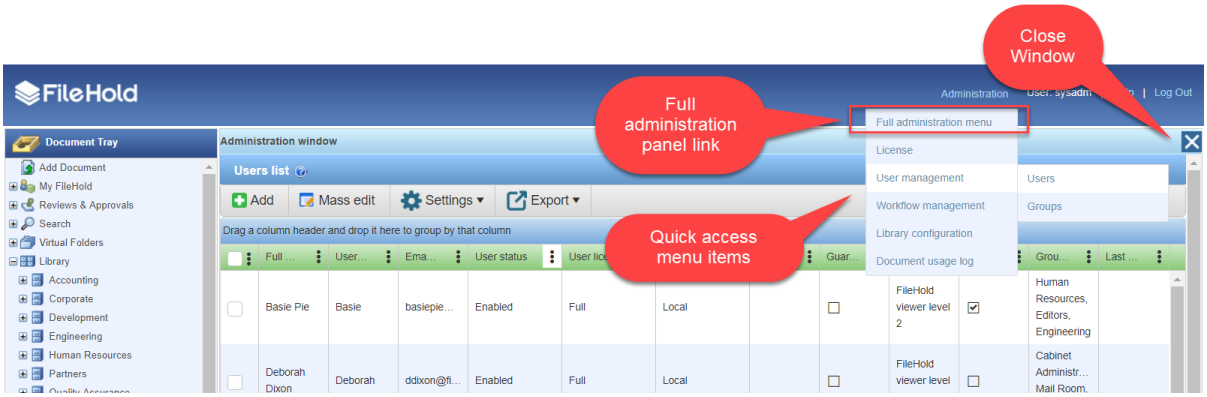
For example, to set the renewal date 12 months after the contract date (which is a metadata field), the format of the tag would be:

```
[[md|DateOffset(Effective date,0,12,0)|MMM-dd-yyyy]]
```

8. WEB CLIENT ADMINISTRATION MENU

The Web Client “Administration Panel” link has been changed to simply “Administration” and now provides quick access list to some frequently used administrative functionalities. This gives an administrator the ability to easily make an administrative change without the need to leave the FileHold library view, much like in the FileHold Desktop Application (FDA).

The Administration panel is available through the “Full Administration Menu” link. The Administration window can be closed by clicking the X.

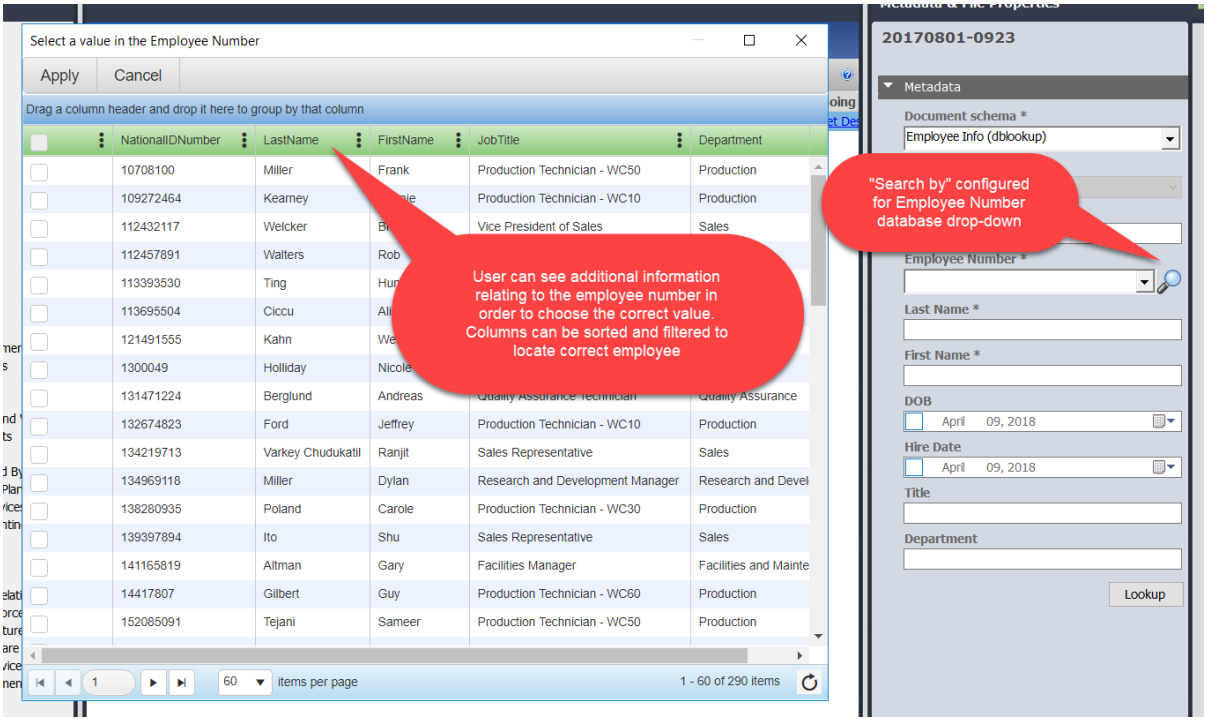


9. DATABASE LOOKUP ENHANCEMENTS

9.1. "Search by" fields in metadata pane

When configuring database drop-down lists, up to four "search by" fields can be set to help users choose the correct value from the drop-down list. Often the single lookup value is not sufficiently descriptive so selecting the correct value from the list can be difficult due to having similar names, long names, or numbering. "Search by" fields help simplify the selection process. The list of "search by" fields are selectable from the list of columns in the view or table. There is an option to allow to search by the "lookup by" field name in the event that this differs from the "retrieve from" field.

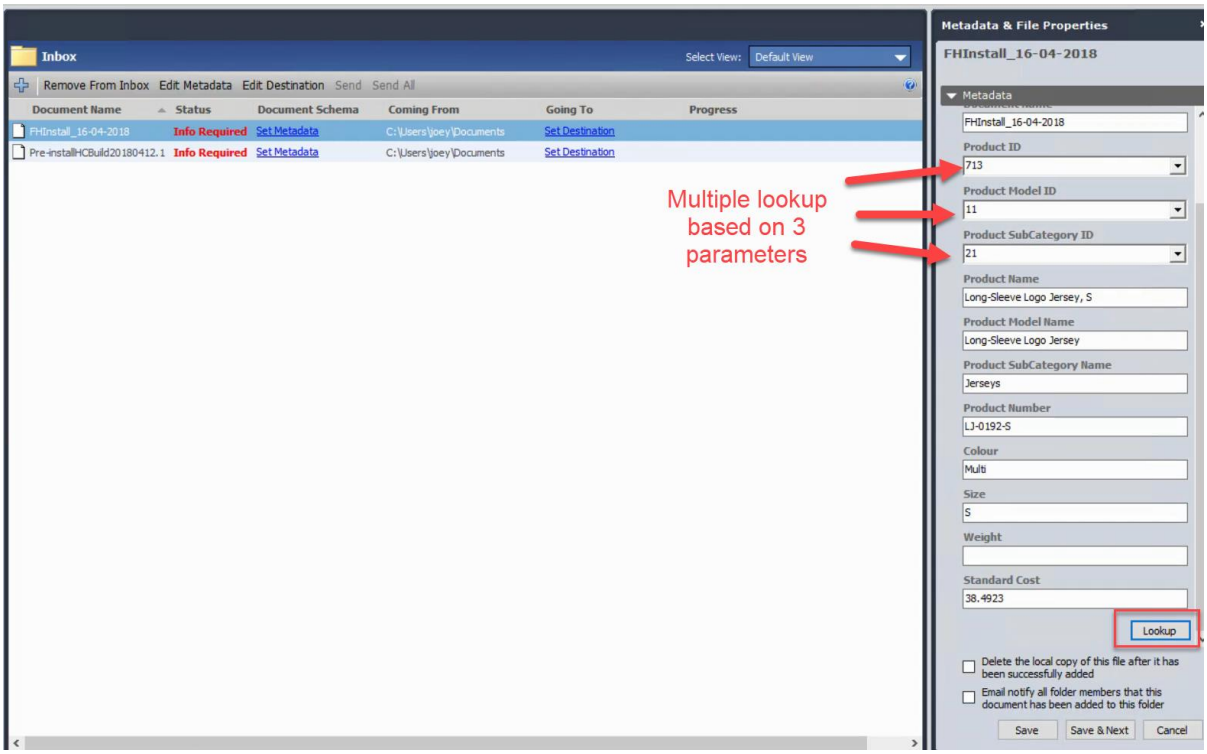
Once the "search by" fields are configured, the end user has the ability to click the "Search by" button in the metadata pane. In the Search by window, the user has ability to view the search by information, and filter and sort the data in order to select the correct value from the list. For example, when putting employee information into the system, the lookup is done on the unique employee number field. However, remembering the employee number for each employee is not practical. Using this solution, the user can see the employee's first and last name, title, department and so on to ensure the correct employee number is selected.



Users can use the filters and sort capabilities in the displayed table to ensure the correct value is selected.

9.2. Multiple parameter lookups on a schema

Up to five lookup parameters can now be configured in a schema lookup with the custom query option enabled. This allows users use more than one metadata field value in their custom query. For example, a customer is classifying construction documents for a property. Construction is related to a lease and can include one or more jobs. The customer would like the document to have the lease id, lease name, job id, and job name metadata information populated. When the lease id and the job id is selected from the drop-down list in the metadata pane and the Lookup button is pressed, both the lease id and the job id are passed as parameters to the custom query then the system retrieves both the lease and job names. The custom query must be formatted properly in order to perform this type of multiple lookup.



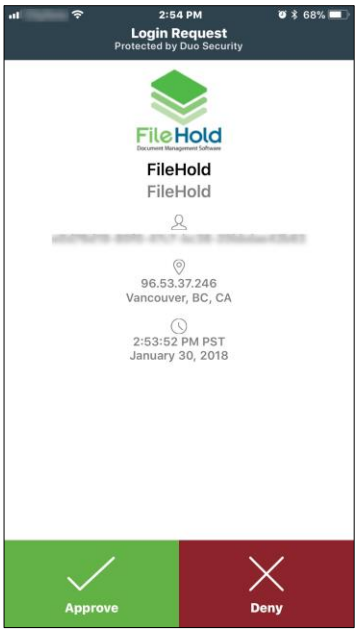
10. MULTI-FACTOR AUTHENTICATION

If you need additional security when accessing the FileHold application, the new multi-factor authentication feature strengthens access security by requiring two methods to verify a user's identity. FileHold supports multi-factor authentication (MFA) with the Duo (www.duo.com) "Trusted Users" service.

Duo MFA is used when configured in FileHold. Each standard FileHold client supports MFA including: FileHold Desktop Application (FDA), web client, mobile web client, and Courier client.

An administrator needs to set up the Duo account at www.duo.com prior to configuring MFA in FileHold. This is the responsibility of the customer, not FileHold. Visit the Duo website for information on setting up an account.

Each user requiring authentication will also need to set up their own accounts with Duo. MFA can be disabled for a particular user account.

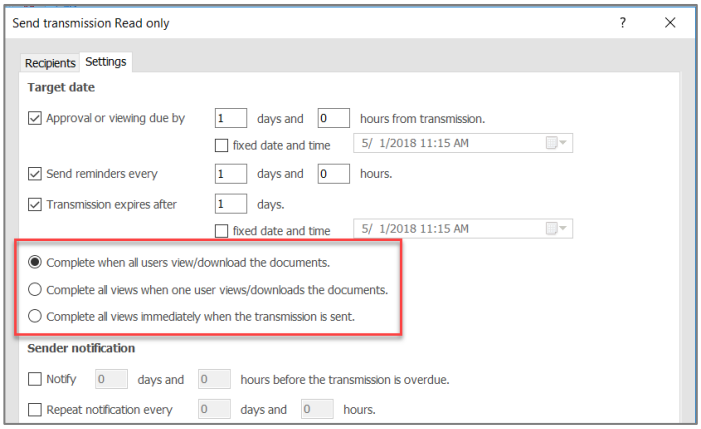


Example of Duo Push authentication method – notification sent to iOS Duo app

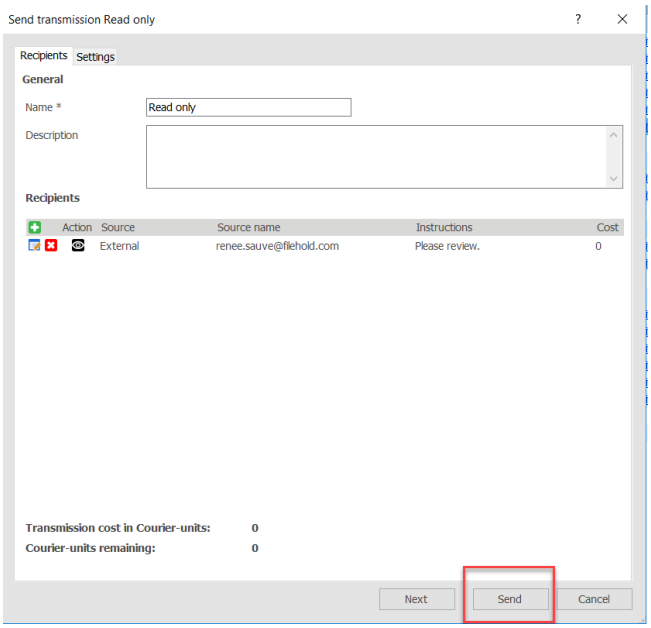
11. COURIER

New options are available in the Courier templates:

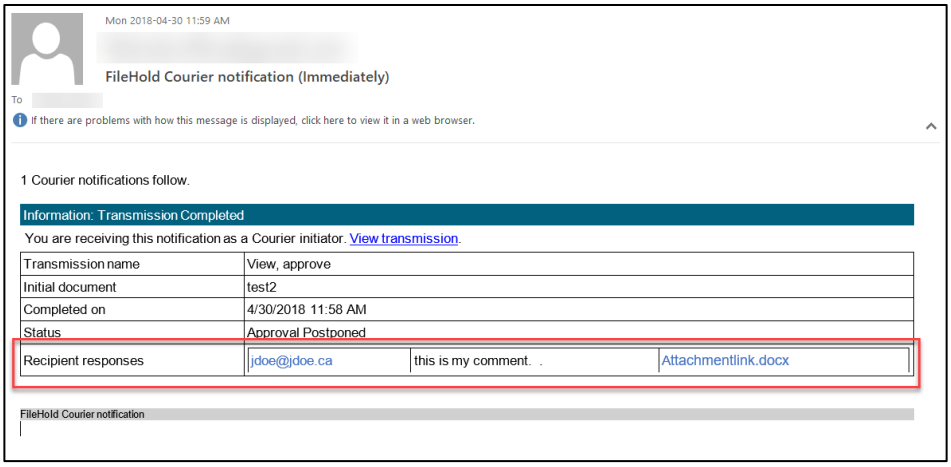
- Options to disable the ability to download and/or print a document in Courier. The download option is removed in the main Courier page, and the print option is removed from the viewer.
- Options for automatically completing a Courier transmission after viewing the documents have been added to the Courier templates. These options are only available for review activities. If there are any approval activities in the template, these options are not available. The following options are available:
    - Complete when all users view/download the documents. This is the default option.
    - Complete all views when one user views/downloads the documents. If the transmission was sent to many users, it will be considered completed after only one person completes the viewing of the documents.
    - Complete all views immediately when the transmission is sent. The transmission is considered completed immediately after sending.



- The **OK** button has changed to **Send** button on the Recipients tab.

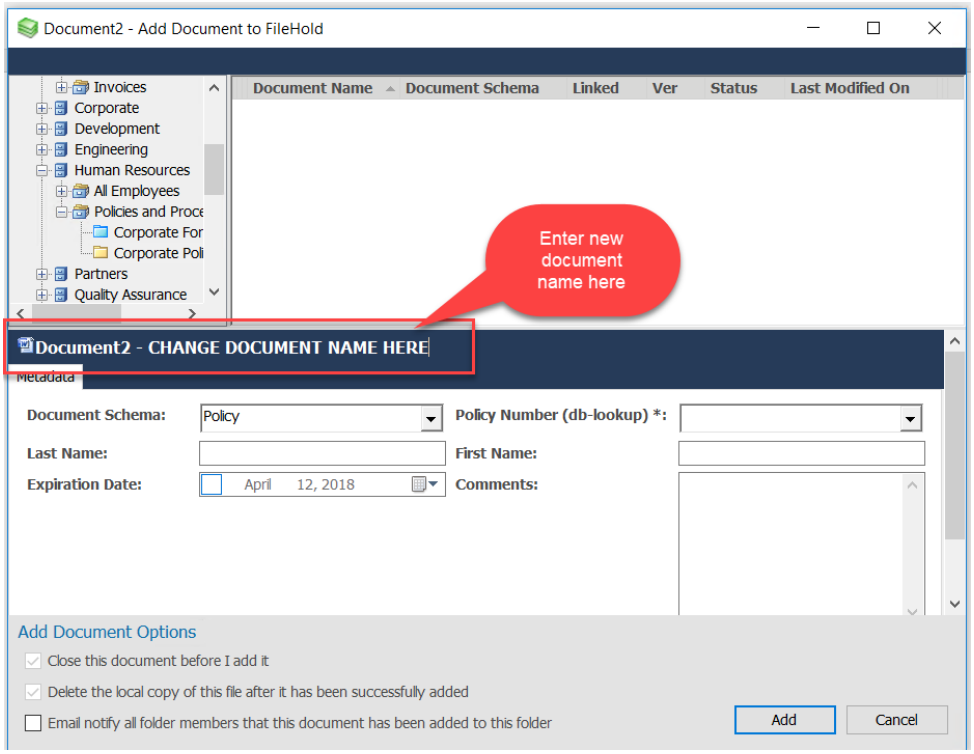


Recipient comments are now readable on the Courier notification emails for the initiators. Comments include the email, comments and any feedback document links. This makes it easier for initiators to review feedback from transmissions.



12. ADDING MICROSOFT OFFICE DOCUMENTS WITHOUT SAVING LOCALLY

The requirement of saving a Microsoft Office document locally prior to adding to FileHold has been removed. Documents can now be added directly to FileHold without the need to save it first. If the document has not been already saved with a file name, then a generic file name, such as “Document1” is given to the file. This name can be changed in the FileHold Office Client (FOC) window or a custom naming pattern on the schema can be used to automatically rename the documents.



13. MINOR ENHANCEMENTS

A number of minor enhancements have been made to FileHold.

13.1. License Utilization

The License Utilization page displays a summary of the purchased licenses. The total number of licenses, the number in use/enabled, and the number available are shown for registered users, full concurrent sessions, viewers, Capture licenses, WebCap scanning licenses, SharePoint sessions, limited concurrent sessions, and more. This information was displayed on the Users list for previous releases of FileHold.

13.2. FDA Large File Transfer

The ability to upload documents of unlimited size has been restored in the FileHold Desktop Application. This was previously limited to 2GB. By default files are uploaded in 500 MB chunks, but this size can be changed.

13.3. Document usage log

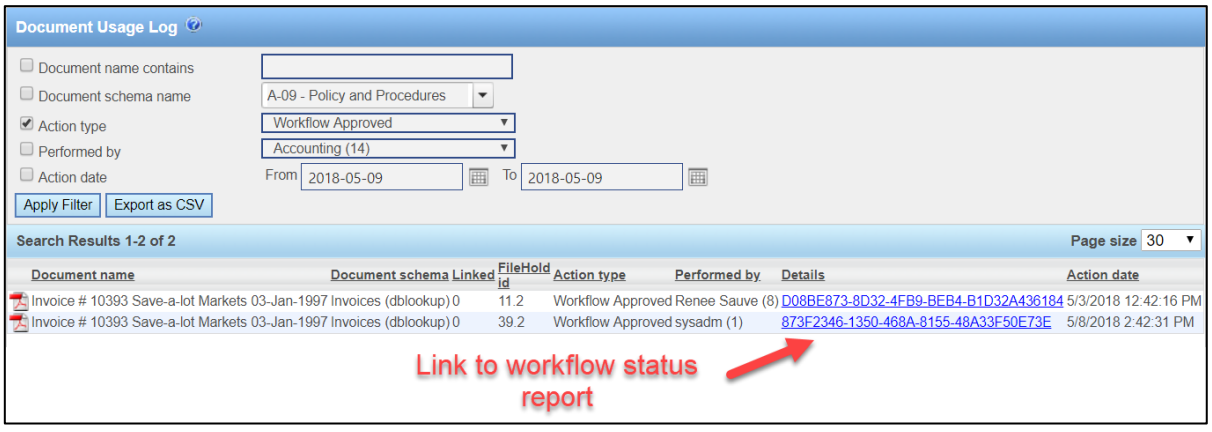
The Document usage log has been updated to include the details from the assemble documents jobs:

- Copied — Documents that were copied in the process of assembling the new documents. The Batch number and FHID are included in the details.
- Add document — The document that was created from assembly. The Batch number, the document location (cabinet/drawer/folder), and the FHIDs that were used to assemble the document.
- Viewed — The newly assembled document was viewed.
- Workflow initiated — A workflow was started on the newly assembled document. The batch number is displayed in the details.
- Courier initiated — A Courier transmission was started on the newly assembled document.

The following actions have been added to the Document usage log for main workflow documents:

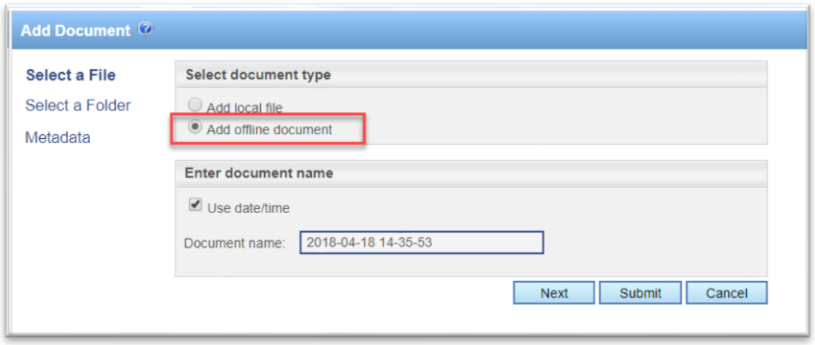
- Workflow approved
- Workflow reviewed
- Workflow not approved
- Workflow approval postponed
- Workflow cancelled
- Workflow initiated
- Document has been added or removed from a workflow

If the user has a system administration or senior library administrator role, the workflow status report can be accessed by clicking on the workflow GUID link in the Details column.



13.4. Add Document Wizard – Offline Documents

Offline documents can now be added through the Add document wizard in the Web Client. “Add offline document” is an option in the wizard. A document name can be manually entered or the current date and time can also be used as the document name.



13.5. System audit log

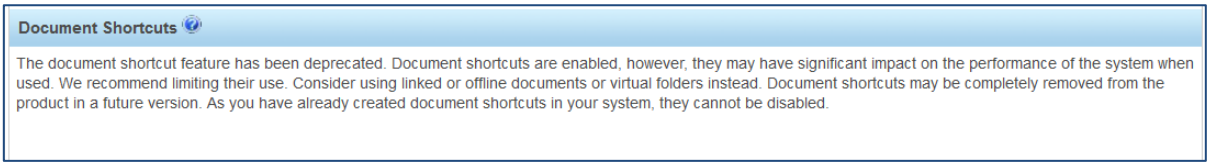
The following log entries have been added to the system audit log:

- Change security settings
- Change email settings
- Change general system settings
- Change search settings
- Initialized FTS index

13.6. Document Shortcuts Deprecation

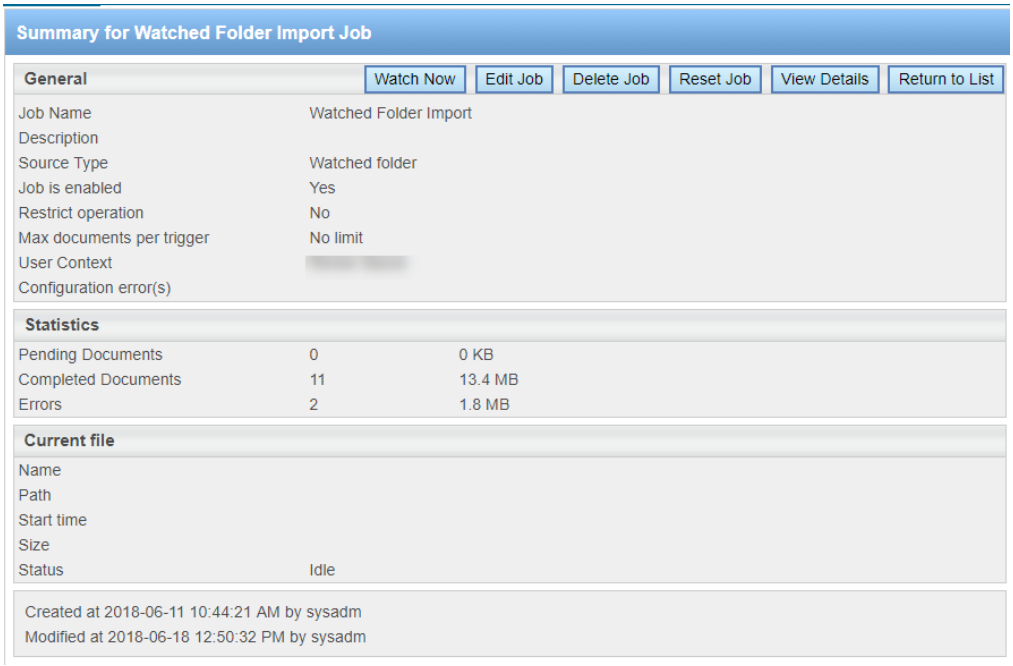
Document shortcuts are rarely, if ever, used. For this reason, this feature is being deprecated from the software. For new installs, the option for enabling document shortcuts is no longer available.

For upgrades, the option will be removed if there are no shortcuts being used in the system. If shortcuts are being used then upon upgrade the option is moved to the bottom of the configuration page with the message: "*The document shortcut feature has been deprecated. Document shortcuts are enabled; however, they may have significant impact on the performance of the system when used. We recommend limiting their use. Consider using linked or offline documents or virtual folders instead. Document shortcuts may be completely removed from the product in a future version. As you have already created document shortcuts in your system, they cannot be disabled.*"



13.7. ADI Jobs

Additional statistics have been added to the ADI job details. These include: the number of and size of pending documents, the number and size of completed documents, the number and size of errors, and information about the file that is currently being processed, if any.

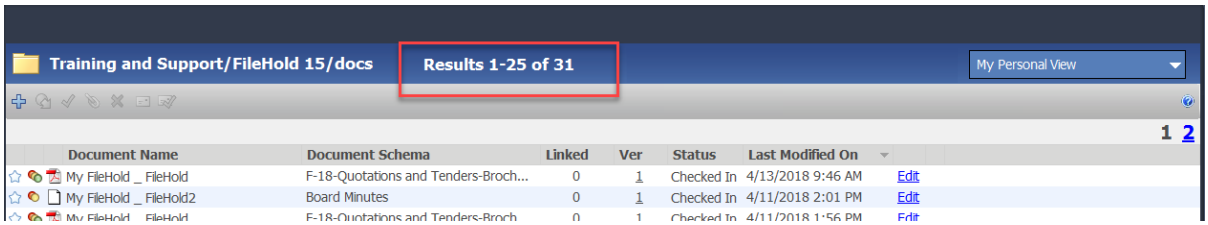


13.8. Full Text Search Re-indexing Message

Certain changes in FileHold configuration can cause a re-indexing of documents, such as editing or deleting a drop down or drill down metadata field value or deleting a metadata field from a schema. If the user performs one of these actions, a message “You are about to make a change that will cause x documents to be re-indexed. While these documents are being re-indexed, users may notice decreased performance in the system.” may appear according to a configurable threshold.

13.9. Folder results

The number of documents in a folder is now displayed as search results.



14. RESOLVED ISSUES

ID	Title
6455	(Mobile FileHold) Strange behavior when taking picture to add as regular documents or review/approval feedback document (iPhone-5 with iOS-7).
6603	(FDA) Sometimes FastFind selection search (CTRL+D) needs to be invoked twice to work.
6901	(FileHold 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 dropdown values.
8348	"TWAIN web connector not found" warning message prompts user upon opening the Scanner Inbox preview in Edge or Chrome.
8361	(Web Client) Pressing Enter when adding a drawer to a cabinet does not save the drawer.
8387	(Server updater) FileHold scheduled tasks were not created after upgrading a FH15.1 to 15.2 on a Windows Server 2016.
8498	Failed to extract value(s) from a metadata field name containing special character(s) when converting a document to a pdf during a workflow.
8515	(FDA) You cannot sort by 'User type' column found in the Administration menu > User management > Users list.
8526	Incomplete hardware key value showing up in the text area when requesting a license file in some FileHold 15.2 installs on Windows Server 2016.
8531	(SharePoint WebParts) integrated authentication does not work on SharePoint 2013.
8533	(FHIT) Cannot logon to the AD synchronization tool of a FH server configured only for HTTPS.
8535	(FDA) Inline edit of dropdown fields does not work correctly.
8536	(ADI) Loading document details is slow when the list of imported documents is allowed to grow very large before clearing.
8540	(FDA) Cannot enable the print function for a user who is a member of the "Read only" FH group.
8543	(FOC) Cannot attach a document from the Library Archive to an Outlook message.
8557	URL fields do not appear as links in finished document when converting a document to a PDF during a workflow.
8560	A non-administrative user cannot see the latest version of a document in a workflow they previously initiated when the document was marked as 'approval postponed'.

ID	Title
8576	Several issues found when performing multi-selection of menu items from a dropdown metadata field list.
8577	Mass edit is disabled for documents in a workflow.
8578	Workflow dashboard does not display on Windows server 2016 systems by default.
8586	Cannot search for a file associated with a Currency or a Number metadata field with decimal place in a specific scenario.
8623	At 125% display settings, the Options section in the activity details of a workflow template is cut off.
8628	The 'Web scanning' column found in the Users list should be removed when there are no licenses for it. It displaces the other columns in the view.
8629	The “Web scanning” check box should be removed from the User properties when there are no licenses for it.
8636	A Guest user should be able to open a document automatically rather than display the 'Confirm direct access action...' window.
8640	An error is generated during AD synchronization process.
8641	DateTimeFormat issue in event and event notifications issue. Not all user defined events are triggering events and email notifications.
8645	Pre-installation HealthChecker Tool verifies and checks only the "features" component and not the "server role" component of ASP.NET 4.6 in Windows Server 2016.
8646	(FDA) Does not keep the previous setting a user has for the document import format type after an upgrade.
8653	(FHIT) Some application settings in certain web.config files were not updated after a FileHold site port change.
8659	Brava license does not grant correct rights to FileHold viewer.
8668	(FHIT) Exception thrown when attempting to export library configuration with public saved searches configured with 'Contains In DB' as search operator.
8685	(FDA) Cannot publish to PDF after reordering pages of the file in the Brava viewer.
8686	Cannot modify the File Name suffix in the Custom file naming pattern settings of a schema.
8734	(WebClient) Cannot edit the initial value of a drill-down menu metadata field to blank.
8742	(FDA) Ampersand is dropped from the object names in the title bar of a folder.
8751	When changing a folder owner and there are more than 1,000 folders in the library, performance of the operation is low.
8803	User's “disabled” status does not show up in the Group Members section in cabinet or folder properties.
9133	(WebClient) Custom SQL connection/query options should be disabled by default if the 'Custom Providers and Queries' option is not enabled in the license.

ID	Title
9230	Contents of the page where annotations were added are missing as viewed from the FileHold viewer after publishing.
9316	Email notification for a recurring user defined event does not get sent for future dates.
9318	(FDA) Select box controls do not validate the existence of a value present in the list while entering a field value.
9324	Inconsistencies found in some 'Add file' operations related to enabling the deleting of the local copy of a file.
9325	Missing info in the Details column of an 'Owner Changed' action type in the Document Usage Log.
9336	Cannot save the changes made to the folder permissions using the link provided in the Effective permissions report.
9359	(Server updater) Some application settings in the Document Repository and Courier web.config files were not updated to https.
9360	(FHIT) Tool reports incomplete set of application settings that were not updated to https.
9362	(SmartSoft Capture) Misleading alert message when a user attempts to open a Capture session beyond the number of its allowable concurrent sessions.
9363	Owner of a workflow supporting document should not receive the email notification upon completion of the activity.
9370	Documents in a workflow are not visible to Cabinet Administrators users or participants in a specific scenario.
9393	Cannot change owner of documents found in the Library Archive.
9409	(FHIT) IIS properties status shows green even if some WC2 components were not configured properly in HealthChecker report.
9448	(FDA) Clicking on the down arrow shortcut link resets the advanced search settings involving the 'Include Archive in Search' option.
9463	(FDA) Date metadata field and File Type field for an empty saved search are not set to blank.
9517	Domain group should not show up in the results list of users whom you can give document ownership.
9526	Bug in .NET 3.5 prevents FileHold from cleanly disconnecting from SMTP email servers.
9547	Errors thrown when trying to approve a workflow that has been reserved.
9565	(FDA) Red X appearing on screen.
9601	(FHIT) Cannot export library configuration if the 'Automatic Document Importation' is disabled in the server license.
9604	(FHIT) Include the 'Failed logins' log in the HealthChecker log package file.
9608	Unexpected error (converting data type bigint to int) when removing files from Document Repository with 3 or more locations defined.

ID	Title
9610	Deadlock may occur when starting a new session when there are a lot of records in the ActivityLog table and a very high volume of new sessions being created.
9656	System sends out FullTextSearch status email notification which does not contain the list of unindexed files.
9659	Date-based custom naming pattern does not adhere to the date display format of metadata fields they are based upon.
9702	Moving files to the Library archive remove their associated document links.
9738	Improve code to prevent a rare race condition during user session validation. Manifests when sessions created with automation.
9740	(Mobile FileHold) Exception thrown when attempting to perform an empty saved search involving a dropdown menu metadata field.
9775	Full text search term in quotations cannot be found.
9824	The 'Current Members' list found in the Security tab of any library object properties should be alphabetically sorted.
9910	Previously triggered user defined events based on custom date metadata fields are not reset when the field value is changed.
9980	Custom name settings for a Workflow template was lost after merging a local user to a domain user.
9991	Use the "Tasks Instructions" label consistently in the Workflow area.
10001	(Pre-installation HealthChecker) Tool should verify that the FH service account has the correct access permission to the FileHold databases.
10027	Find people is confusing for domain groups. For example, a search for "Accounting" or "Department" will not return Accounting Department in the results.
10037	Initiator with document publisher role cannot delegate task in the delegate participants screen.
10077	Recurring event based on a custom date field sent notification on wrong day when application server and SQL user regions do not match.
10078	Missing sign-off sheet info details for a document associated with 'Approval postponed' action.
10098	(FOC) Failed to add/check-in/approve a file when using OneDrive in specific scenario as the storage for user files.
10134	No matching records found when performing a lookup by value with more than 50 characters. The maximum should be 100.
10730	Library administrators incorrectly sent exceeded login attempts notifications.
10731	“Storage location full” message incorrectly sent to library administrators.
10743	(FDA) Default working folder for a user was not retained after logging out/exiting when making a local copy of a file.

15. 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.
8221	A small amount of new text cannot be translated in a language pack.
8319	Improve the reliability of FH service account validation with respect to the relevant local server settings or domain policies in the Pre-installation HealthChecker.
8403	(FOC) “Add file” operation menu items are disabled on MS Outlook 2016 after successfully logging on to the FDA in certain scenario.
8495	Workflow exists without assigned documents.
8530	(FDA) Word table not correctly formatted in Brava viewer.
8555	The user sessions log may have orphaned sessions after the system is upgraded or moved while there were active sessions.
8679	Missing System version and build number from the License information page after applying patch to remedy the 'AD synchronization' error.
8764	Some Spanish letters/characters are being changed by the system.
9131	Reported cases of some documents being duplicated in the system.
9132	(Pre-installation HealthChecker) 'Logon failure' for the FH Service account occurred in some FH upgrades
10745	(FDA) A list of values is passed to the ‘document-name’ tag in template when merging multiple documents into one
10748	(Web Client) An error occurs in ‘OCR queue status’ after clicking ‘Apply’ button when the application server time format does not match the SQL server user time format. To fix, match both server time formats.
10760	(Web Client) Users with full license can be added to Limited role group.
10762	(FDA) If user is in My Tasks view, the system does not log off the user after the specified logout period.
10763	(Courier) Wrong calculation of the Courier license parameters found in the dashboard in the event that one of the license packs is locked.
10766	(FDA) Issues found when performing multi-selection of items from a dropdown database lookup metadata field in a specific scenario.
10768	(FDA) Slow search load in the system with many schemas.
10769	(FOC) Add-in for Excel allows user to choose to modify an unrelated ".xla" file add-on.
10796	"Contains in FTS" operator does not work when performing a search for a metadata field value. As a workaround, use “contains in DB” or “equals” or “in the list” options.