



FileHold

Document & Record Lifecycle Software

RELEASE GUIDE
VERSION 14.1

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1. FILEHOLD 14.1 OVERVIEW

This document is a high level description of the new features and enhancements of FileHold 14.1.

2. SYSTEM REQUIREMENTS FOR FILEHOLD 14.1

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 2005 SP2 Enterprise (32 bit)
- SQL Server 2005 SP2 Standard (32 bit and 64 bit)
- SQL Server 2005 Express (32 bit)
- SQL Server 2008 (64 bit)
- SQL Server 2008 R2 (64 bit)
- SQL Server 2008 Express (64 bit)
- SQL Server 2012 SP1 (64 bit) Enterprise
- SQL Server 2012 SP1 (64 bit) Express
- SQL Server 2012 SP1 (64 bit) Standard
- SQL Server 2012 SP1 (64 bit) Enterprise Core

2.3. Web Browser Support

- Internet Explorer 7.x , 8.x, 9.x and 10.x (32 bit and 64 bit)
- Mozilla FireFox 27.x+
- Google Chrome 33.x+
- Safari 5.1 (tested on Windows only) (not supported for WebCap)

2.4. FDA Operating System

- Windows XP SP3 (32 bit)
- Windows Vista SP2 (32 bit and 64 bit) – Top 3 editions
- Windows 7 SP1 (32 bit and 64 bit) – Top 3 editions
- Windows 8 and 8.1 (32 bit and 64 bit) – Professional and Enterprise editions. (**NOTE:** On Windows 8 operating systems, the .NET Framework 3.5 needs to be installed for Microsoft Office integration.)

2.5. Microsoft Office Support

- Microsoft Office Professional 2003 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio)
- Microsoft Office Professional 2007 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio)
- Microsoft Office Professional 2010 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)
- Microsoft Office Professional 2013 (32 bit) (Outlook, Word, Excel, PowerPoint, Visio, OneNote)

2.6. Microsoft SharePoint Support

- Microsoft Office SharePoint Server 2007 (32 bit and 64 bit)
- Microsoft Windows SharePoint Services 3.0 (32 bit and 64 bit)
- Microsoft Office SharePoint Server 2010 (64 bit)
- WSS 4.0/Microsoft SharePoint Foundation 2010 (64 bit)

2.7. Mobile Platforms Support

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

The mobile client uses HTML 5 with a small screen size so it is expected that many devices will work correctly even if they are not officially supported.

3. FILEHOLD DESKTOP APPLICATION

The 14.1 version of the FileHold Desktop Application (FDA) is compatible with the FileHold 14.0 server.

4. EXPORT FILEHOLD LIBRARY CONFIGURATION

When exporting the library configuration, the following information is now included in the XML output file in FileHold Instrumentation Tools (FHIT). This information can be imported back into FileHold. For example, if you are using a test and a production system.

User Information:

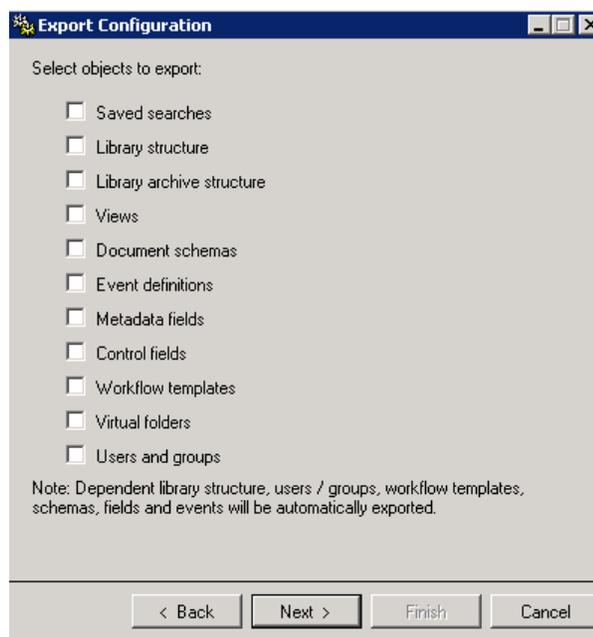
- Viewer license information
- Default language
- Contact information
- Personal saved searches and virtual folders
- Personal views
- Preferences (alert, workflow, user, FastFind, view)

Schemas and metadata fields:

- Workflow templates associated with the schema and settings
- Event definitions
- Public saved searches and virtual folders
- Public and default views

Library structure properties:

- Cabinet and folder auto-tagging rules
- Folder colours
- Library archive structure



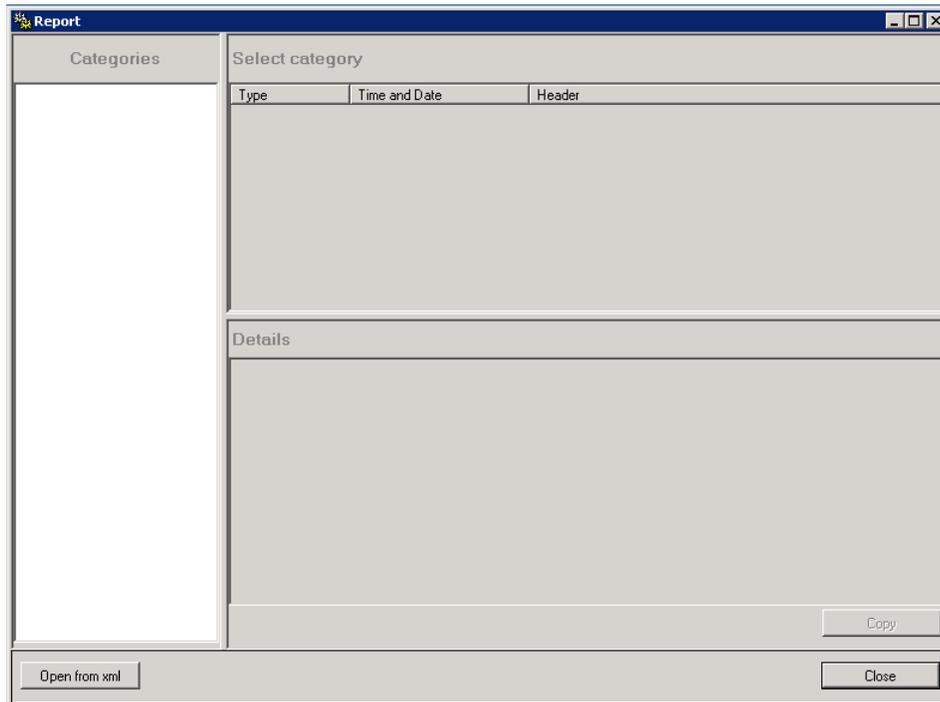
A log from the import/export process can be viewed. The log contains entries with various severity levels (information, warning, and error) along with the details.

The logs file can be exported as an XML or text file. You can also import previously exported XML log files using the Report Viewer function of FHIT.

5. FHIT REPORT VIEWER

The Report Viewer in FileHold Instrumentation Tools (FHIT) allows you to view the logs of exported reports that may have been generated using the various FHIT wizards.

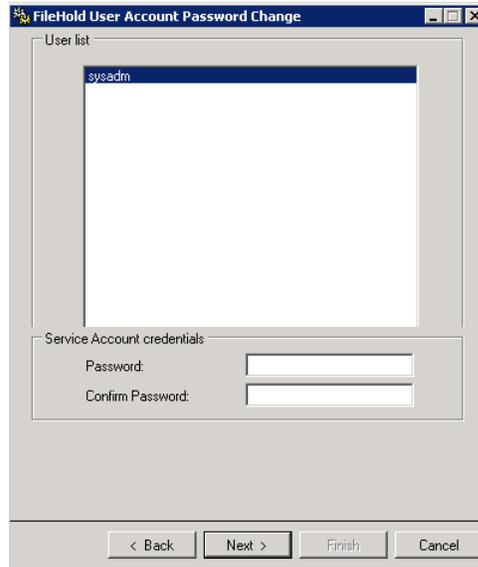
The Report Viewer allows you to upload the report and view the list of entries with the severity (information, warning, or error) as well as any details about the error. The logs can be exported into an XML or text file.



6. SYSTEM ADMINISTRATOR PASSWORD CHANGE

There may be a time where the password for the system administrator account is misplaced or forgotten. In FileHold Instrumentation Tools (FHIT), you can now reset the system administrator password under ADAM objects management > Change user password.

Follow the prompts in the wizard to change the password.

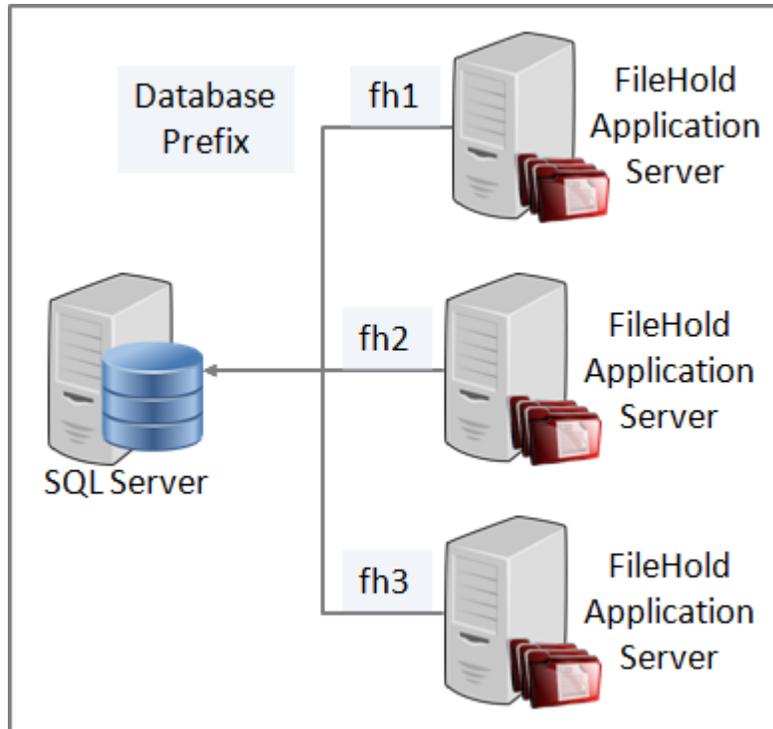


7. MULTIPLE DATABASES PER SQL SERVER

During the installation process, it is possible to allow the use of a single database instance to support many FileHold applications servers. With a correctly sized server, a single SQL Server instance could run many FileHold servers in a more license cost efficient fashion.

At installation time, the database name prefix can be changed to differentiate the different instances of SQL. The database name is a combination of the prefix (2 to 5 characters) with an underscore character and the web service name. For example, `pref_userrolemanager`. Each instance is required to have a unique prefix.

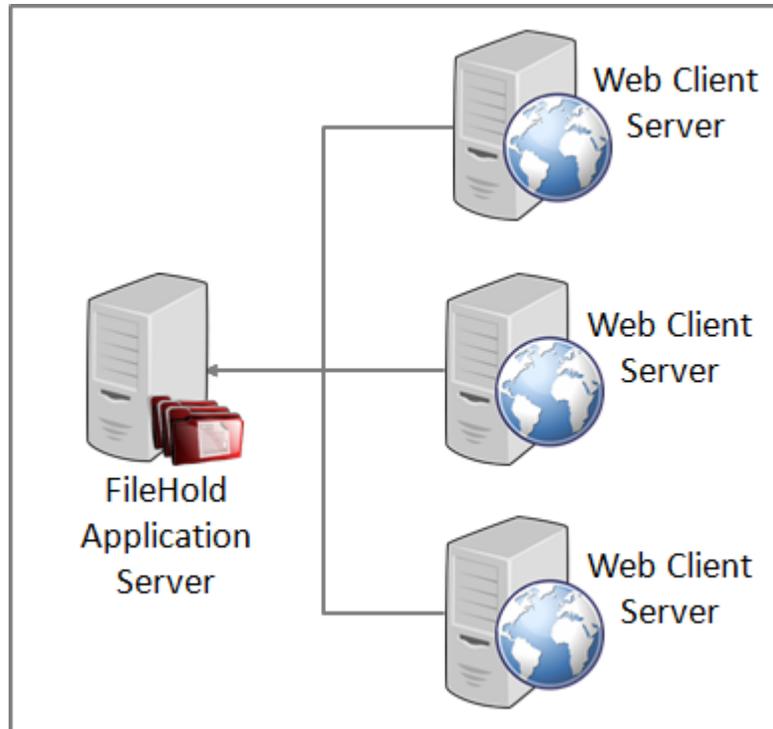
There will be no interconnection between FileHold application servers despite the fact that their databases are shared on the same server. The local configuration of each FileHold server has the information needed to connect to the correct database for all functions including FHIT.



8. SEPARATE WEB CLIENT SERVER INSTALLER

During the installation process, it is possible to install the Web Client server independent of the application server. This allows a configuration where many server machines can run many web client users, all pointed to a single application server to distribute the load of the web client.

When installing FileHold, the option to select the installation is presented type: a full installation or a web client installation. If installing a web client server, then the pre-installation health checker and FHIT have been modified with only the relevant tools and information.



9. WEBCAP

WebCap is a web-based scanning feature that allows each remote user to scan documents using only a web browser without having any local scanning software installed.

When submitting a document to the repository from the Scanning Inbox, an auto-filing script can now be used to set the document destination.

In order to use an auto-filing script, it must first be configured on the server and on the schema. See the [Knowledge Base](#) for more information on how to set up auto-filing scripts.

The screenshot shows a web-based interface for document submission. On the left is a sidebar with three menu items: "Select a Folder" (highlighted in blue), "Submit Settings", and "Metadata". The main content area is titled "Select a folder to file scanned document" and contains a single checkbox labeled "Auto-file the document according to its metadata" which is checked. At the bottom right of the main area are three buttons: "Next", "Submit", and "Cancel".

WebCap can be configured so that the image is displayed is in 'lock down' mode. This means that the header, footer, and library tree are hidden and the Scanning Inbox is shown in full screen mode.

The API for WebCap has been updated so that the schema type and metadata field values can be passed to FileHold.

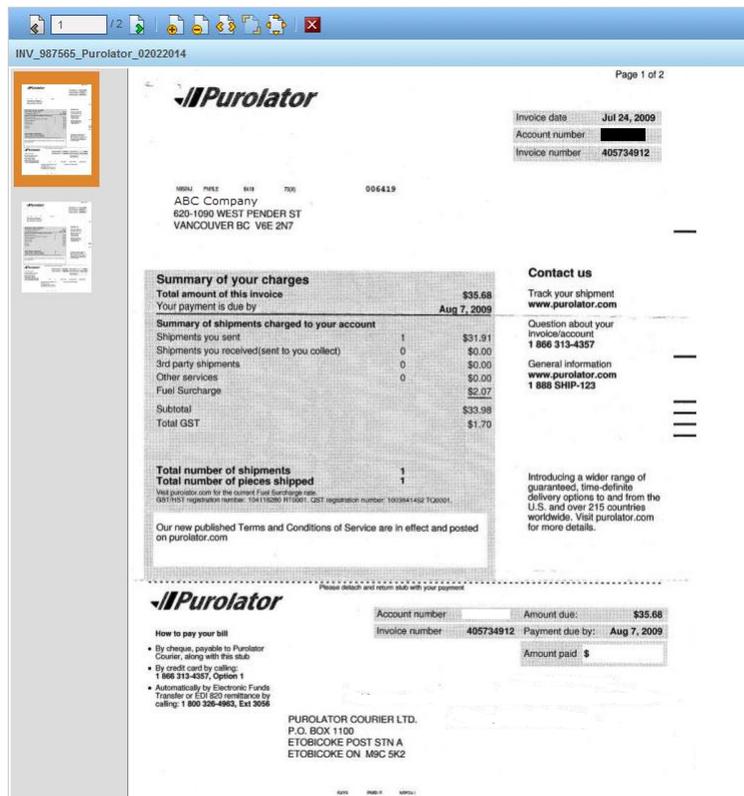
WebCap is an optional feature.

10. WEB VIEWER

A viewer that can display image files (jpg, png, bmp, gif, and tiff), Microsoft Word, and PDF documents is now available in the Web Client called the Web Viewer.

The “View Document” command is available from the document’s contextual menu. The document is opened with thumbnail displayed on the left side of the viewer and the currently selected page displayed in the main part of the viewer. A toolbar allows you to zoom in and out, navigate between pages, and close the viewer to return to the list of documents.

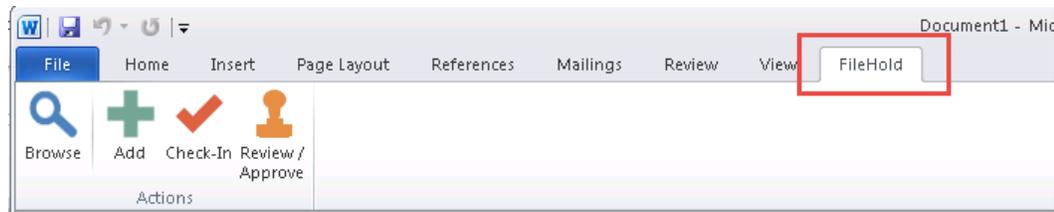
The Web Viewer is an optional feature and a license needs to be assigned to a user by a system administrator in the Users area.



Web Viewer can be configured so that the image is displayed in ‘lock down’ mode. This means that the header, footer, and library tree are hidden and the Scanning Inbox is shown in full screen mode. The ability to get direct access to any document even if there is no Web Viewer license is also available.

11. MICROSOFT OFFICE 2010 AND 2013 INTEGRATION

Microsoft 2013 (32 bit) support has now been added. In Microsoft Office 2010 and 2013, the Add-ins tab has been replaced with the FileHold tab. The FileHold tab now contains new larger buttons for the integrated functions: Browse, Add, Check-In, Review/Approve, and Attach (in Outlook).



12. SCHEMA-BASED AUTO-FILING SCRIPT

The new Schema-Based auto-filing script is a very versatile script that can be used to file documents based on a combination of variables. Documents can be filed based on:

- A document schema name. The schema name is used as the level in the library hierarchy.
- A metadata field value. The value in the metadata field is used as a level in the library hierarchy.
- A fixed value. A fixed value is defined in the configuration and is used as a level in the library hierarchy.

All can be used to create any level in the library structure. For example, a cabinet can be a fixed value, the drawer can be the schema name, and the folder can be a metadata field value. Alternatively, a cabinet can be a schema name, the drawer can be a metadata field value and the folder is a fixed value.

The name of the script is called Schema-Based.dll and is located in C:\Program Files\FileHold Systems\Application Server\LibraryManager\AutoFiling. There is a separate configuration file for this script called Schema-BasedAuto-FilingScript.xml located in the same directory.

13. API DEMO IMPROVEMENTS

Two new command line tools have been created:

- Batch Metadata Extractor — Extracts the metadata for a public regular saved search into a CSV file. All columns from the default view are extracted.
- Batch Metadata Updater — Updates the metadata for documents returned from a public quick search based on values read from a CSV file.

Other API Demo changes include:

- A command line parameter was added in order to log into FileHold using Integrated Windows Authentication instead of username and password.
- A new custom client type has been added for use by all custom applications. If a user logs in through the API, then the custom client type can be seen in the Activity log. The API Demo has been updated to include this new client type.
- The API Demo now includes both 32 and 64 bit examples.

All API information can be found on the FileHold server in: C:\Program Files\FileHold Systems\Application Server\APIDemo.

14. RESOLVED ISSUES

ID	Title
	Many FDA user interface adjustments to accommodate desktop sizes other than 100%
	Metadata fields can be removed from a schema regardless of whether or not there is data present. A warning message is displayed prior to deleting metadata field.
5136	Error during clone/copy structure with auto-tagging
5219	(FDA) Issue when 'checking out' or 'making a local copy' of multiple documents with duplicate names
5233	Users are now warned when metadata field restrictions could impact existing documents when auto-tagging or making mass edits.
5932	Vague search criteria nomenclature related to 'Date' metadata
5995	(FDA) Non-system administrators fail to add a document associated with a 'Read-Only' metadata field which was not allowed to be modified
6254	(WebClient) Text surrounded by angle brackets were treated as HTML elements in the WebClient
6245	(Mobile WebClient) Missing 'Lookup' button when trying to add a file associated with a 'lookup-enabled' schema
6518	Failed to apply a left or right character with a digit nine anywhere in the mask
6646	(Mobile Web Client) No warning message when adding a document and auto-starting a workflow when the workflow participant does not have access to the destination folder
6647	(Mobile Web Client) Clicking "Go" on keyboard for a Simple Search on Android device does not execute the search
6673	(Mobile Web Client) Empty saved search - dates blank out after using Back button in specific scenario
6674	(Mobile Web Client) Simple search term does not clear after workflow is initiated on document
6675	(Mobile Web Client) Long list of drop down values takes a long time to load for a search
6691	The lookup button remains enabled when user attempts to associate multiple values to a 'multi-select' drop down menu metadata field while in the process of adding a document
6702	(Web Client) SysAdm was brought to the FileHold Library screen upon resetting password of a Locally Managed user in the System Admin > Users area
6705	(Mobile Web Client) When document is not approved, the feedback attachment document is not uploaded
6729	The 'Add Document to FileHold' in the Office client dialog reappears a couple of times after adding an email attachment and cancelling out from the dialog
6746	Many usage log entries now include the internal id of the object in addition to the text description
6752	The activity log now displays mobile web client connections independent of web client connections

ID	Title
6756	(Click2Tag) Error correction dialog now pops up for data and numeric fields when the value cannot be interpreted as a date or number
6760	(Click2Tag) Updated OCR recognition engine
6767	Choosing the option to move or delete files imported from manage imports now removes those names from the do not reimport log after the documents are added to the library
6769	Cannot change a dropdown field value from the documents list window
6777	Improved the information on the license warning email to administrators
6783	Folder inherits cabinet membership on MOVE or COPY even if the inherit flag is off
6799	(FDA) The Copy/Move auto-tagging conflict resolution dialog is well formatted if the desktop is set for 125% or higher
6821	Database dropdown synchronization will not handle more than 2100 row changes at one time
6851	Documents disappear from the workflow status report after new versions are created
6861	Reduced the use of dot net generation 2 garbage collection
6864	The 'View Review & Approval History' is missing from the document context menu if the workflow associated with the document is cleared from the workflow status for the user
6871	An event is added to the Windows event log if there is a change in the hardware license key
6874	(FDA) Exception thrown when trying to 'Get a Copy' or 'make a local copy' of a document
6886	Supporting documents not included in a restarted workflow
6887	Not able to restart a workflow after a postponement if one of the documents was checked in since the postponement.

15. 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/
5564	(Web Client) Documents are downloaded using the octet stream mime type. This disables a file download option in FireFox browsers.
6008	When a date format is set to 'yyyy-MM' the date can be entered directly without the hyphen, but the value is ambiguous and may be interpreted correctly.
6087	Issue when performing a Search involving 'In the List' operator with multi-select enabled and a comma (,) in the value (such as Last Name, First Name). Use the equals (=) wildcard in place of the comma.
6455	(Mobile Web Client) Strange behavior when taking picture to add as regular documents or review/approval feedback document (iPhone-5 with iOS-7)

ID	Title
6579	(Web Client) Empty saved search does not display correct result when user changes criterion in a specific scenario
6601	There is no warning message about missing IIS when installing FileHold server on a custom web site.
6603	Sometimes FastFind selection search (CTRL+D) needs to be invoked twice to work
6657	There is a maximum of one million documents that can be added to the OCR queue.
6664	(FDA) Unexpected error thrown when exporting a document to a local directory where its filename & destination path exceed 260 characters
6701	(Web Client) 'Path to the selected file' is being cleared upon clicking on the Lookup button in the Metadata panel when trying to add a file
6706	(Web Client) Starting a quick search where the search value is the document type will have the initial value set according to the value when the search was created.
6707	(Web Client) Quick search results are cleared after initiating a workflow when the workflow is initiated from the quick search results.
6713	System allows a user delegate a task that was already delegated to them.
6733	It is possible to change cabinet or folder permissions for a disabled user. This can cause future permission problems if the user is re-enabled. It is a best practice to assign permissions only to a group.
6734	'Archive Cabinet/Folder' context menu option is only available to 'System Administrators'
6744	PDF documents cannot be printed using Print-to-FileHold. The output will be garbled.
6850	(Web Client) Library admin workflow status report filter settings are not maintained after the report is run.
6852	(FDA) F5 (refresh) does not refresh the workflow status report view
6865	(FDA) Lookup parameter type cleared for custom queries, Use the web client when creating this configuration.
6866	(FDA) No way to select "lookup using" value on a custom query when creating a look up with a custom query. Use the web client when creating this configuration.
6867	(Web Client) "Verify Query" must be pressed twice to get list of columns when creating a look up with a custom query in the web client
6882	(FDA) The auto-tagging tab at cabinet and folder levels is difficult to read when the desktop resolution is set higher than 100%.