



FileHold

Document & Record Lifecycle Software

RELEASE GUIDE

VERSION 17.0

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For further information about this manual or other FileHold Systems products, contact us at 3010 Boundary Road Office #2H, Burnaby, British Columbia, Canada, V5M 4A1, via email sales@filehold.com, our website <http://www.filehold.com>, or call 604-734-5653.

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1. FILEHOLD 17.0 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 17.0.

2. SYSTEM REQUIREMENTS CHANGES FOR FILEHOLD 17.0

The minimum requirements to run FileHold that have been changed for this release are listed below.

For a list of full system requirements, visit <https://www.filehold.com/how-to-buy/system-requirements>.

2.1. Docusign

- A contract with Docusign for their e-signature services. Contact sales@filehold.com for information on how to engage with Docusign.
- Your Docusign contract needs to allow full API access. FileHold supports individual as well as administrative authentication with the former typically priced lower at DocuSign. Docusign can provide a trial to let you try their service with FileHold.
- FileHold server needs to be accessible to Docusign. Your FileHold server will need to be setup for receiving HTTPS messages from a Docusign IP addresses. If you have a FileHold Cloud server, this is enabled by default.
- Digital signature enabled in your FileHold system license.

2.2. Azure Active Directory Authentication

- A Microsoft Azure tenant that can be managed from the the Azure portal.
- An Azure AD Global Administrator account for the Azure AD tenant you want to integrate with.

3. MODERN AUTHENTICATION

FileHold has added the ability to use OAuth/OIDC authentication in this release. Users can be configured to log in as a local user, a domain user or using an external identity provider.

The Azure Active Directory identity provider and a single tenant is supported out-of-the-box with the AAD authentication optional feature. If you have an alternate identity provider or multi-tenant scenario, our professional services team may be able to assist you.

3.1. Web client log in screen

The login screen in the web client has been updated for to include new authentication types. Users have the ability login using a variety of methods depending on how the system has been configured. The FileHold 17.0 log in screen has been customized with a new background and log in panel including three authentication methods below.



The login page can be customized to show your own graphics, company name, background colour, terms and conditions, and other screen elements for all clients. The full client and mobile client can also have their own background images. The logon page can be modified in the Administration Panel > System configuration > Security > Logon page tailoring screen.

3.2. Azure AD authentication

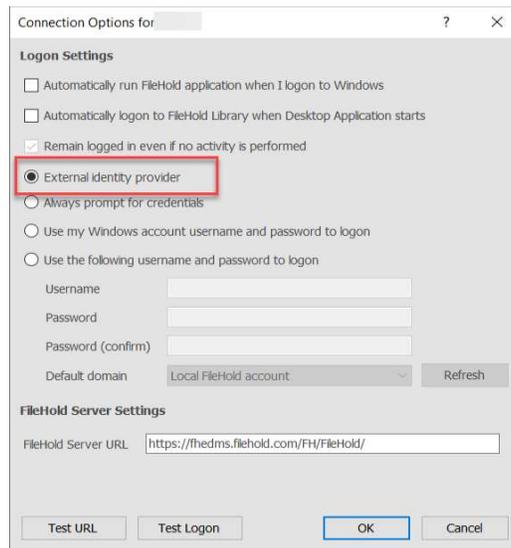
Azure Active Directory (AAD) has been added as an identity provider for FileHold using OAuth2. When users log into FileHold, they have to option to be authenticated by AAD. Users with Azure AD can share a single sign on with applications suites like Microsoft 365 and other applications that support Azure AD.

For assistance with installation and configuration, contact support@filehold.com.

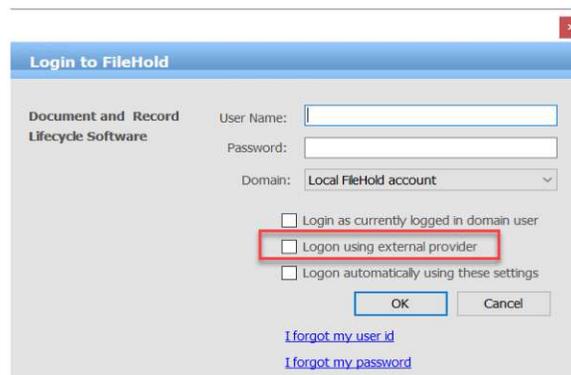
3.3. Logging in with external authorization for the FDA

The FileHold Desktop Application (FDA) Connection options screen has added the option to log into FileHold using an external identity provider. When a user has this option selected the Test Logon button is disabled as the actual log in process is now handled by the browser.

Once the user is logged in successfully in the browser, the user can return to the FDA where they will be logged in.



If the Connection options logon settings are set to “Always prompt for credentials”, the option “Logon using external provider” is now available. If selected, the user is prompted to login through the default web browser. Once the user is logged in successfully in the browser, the user can return to the FDA where they will be logged in.



If a user is signed into their identity provider in their browser, they are not required to re-enter their password credentials when they log into the FDA. Instead they will be prompted to confirm their identity provider and continue without providing additional credentials.

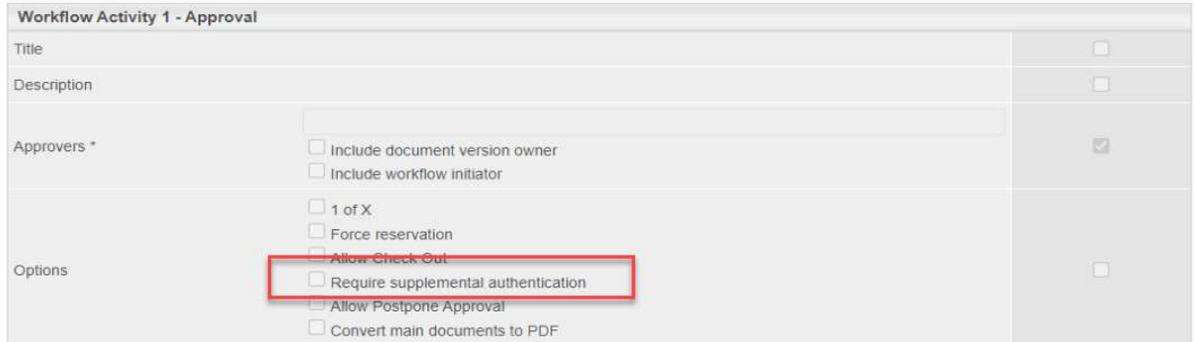
3.4. External identity providers and workflow

Workflow templates have the option to require a user to enter their password upon document approval. The password requirement is to support regulations such as FDA 21 CFR Part 11.

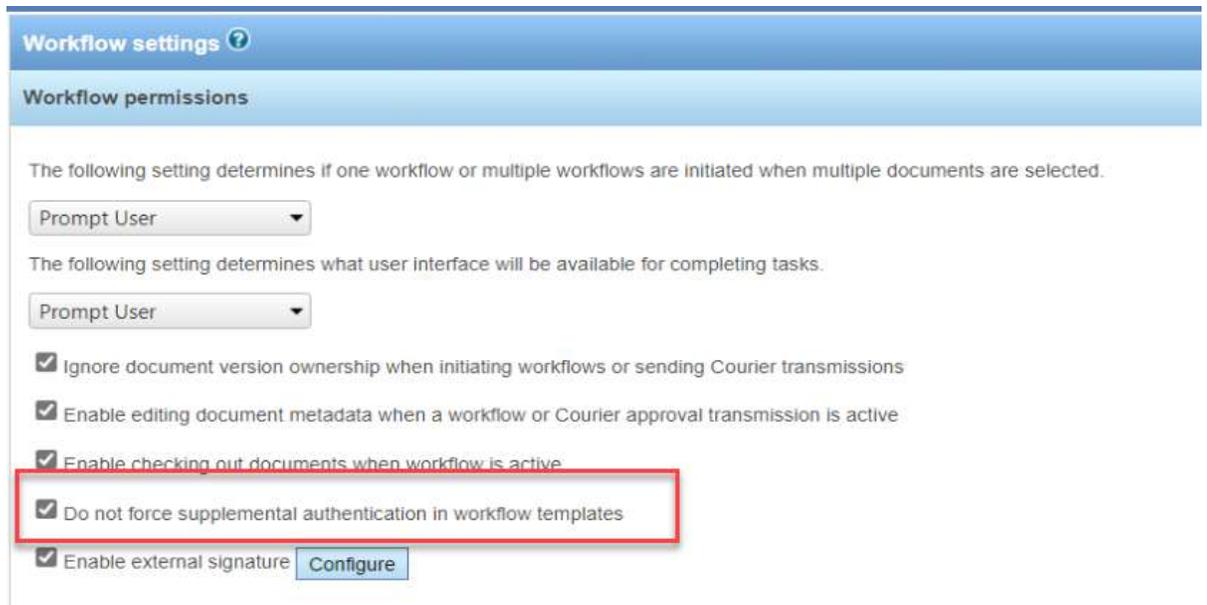
For local and domain users, password authentication remains unchanged in this release. When an external identity provider is used for authentication, a reauthentication request needs to be sent to the identity provider to force reauthentication. This requires users to enter their authentication information in a new screen.

Users authenticated with an external identity provider are not able to use the classic workflow interface.

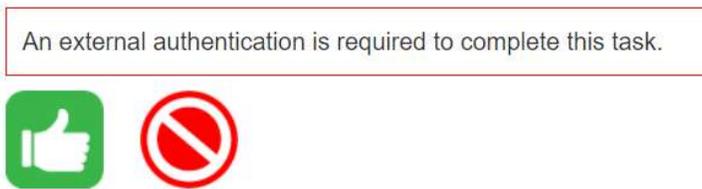
In the workflow templates, the option “Require Password” has been changed to “Require supplemental authentication” which requires a user to enter their password or authenticate with an external identity provider.



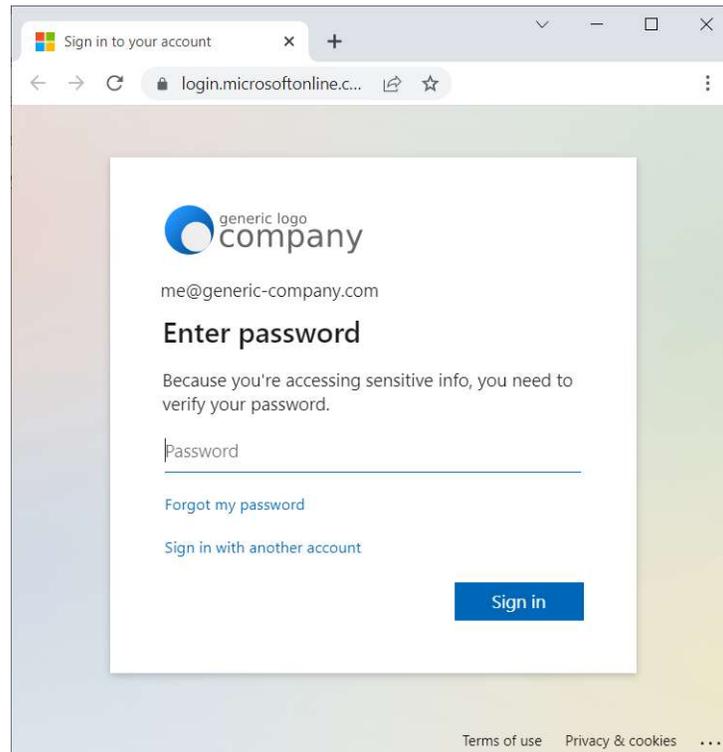
In the Workflow settings > Workflow permissions area, the option “Enable optional passwords in workflow templates” has been changed to “Do not force supplemental authentication in workflow templates”. When enabled, the “Require supplemental authentication” check box can be enabled or disabled on a workflow activity. For example, an authentication is not required for an approval activity or if you wanted a review activity to have an authentication requirement.



When the “Require supplemental authentication” check box is enabled on a workflow template, and modern authentication is being used, the user is required to authenticate their identity in a new screen.



In the web client, the authentication screen opens in a new tab. In the FDA, the authentication screen opens in the default web browser.



3.5. Courier and modern authentication

Internal users that use external authentication can receive Courier transmissions when a password is not required. Local or domain authentication is required where transmissions require a password at this time.

3.6. Create users via self-registration and external authentication

System administrators can allow users to self-register an account in the FileHold system. There are two options for self-registration: create users with a local password and a new option to create users that authenticate with an external identity provider.

Only one option can be selected at a time. If the “using external identity provider” option is selected, the default group is optional. They are added to FileHold using the group, if any, set in the self-registration settings, plus any groups stored in the AAD profile roles.

 A screenshot of a dialog box titled 'User Self-Registration Settings'. The dialog has a blue header with a question mark icon. Below the header, there are two rows of settings. The first row is 'Allow User Self-Registration' with two checkboxes: 'using local password' (checked) and 'using external identity provider' (unchecked). The second row is 'Place in FileHold Group' with a dropdown menu currently showing 'Read Only'. At the bottom of the dialog, there are two buttons: 'Update' and 'Cancel'.

The screen layout for local password users has been updated to match the new style.

3.7. Users page – new user type for external authentication

Users that will authenticate with an external identity provider can be added to the Users list by adding a locally managed user. On the User license tab, a new option “Authentication method” has been added. From this list, a FileHold managed user or an External identity provider can be selected. If it is set to External identity provider, then the users will be forced to be authenticated against the configured external provider. Once the user account is saved, this value cannot be changed.

External authentication users can be full or limited registered users. They cannot be portal alias users.

The screenshot shows a 'Manage users' window with a sub-dialog 'Add locally managed user'. On the left is a sidebar with 'User license' selected. The main form has a 'User license' section with a dropdown menu. The dropdown is open, showing 'FileHold (local password)' and 'External identity provider'. A red arrow points to 'External identity provider'. Above the dropdown, a red error message reads 'This value cannot be changed'. Below the dropdown, there is a 'User license' field with a 'Full' button and a 'Limited' button. At the bottom right are 'OK' and 'Cancel' buttons.

Azure administrators can preconfigure roles to map to FileHold groups. This process is additive. If the role is returned for the user and the group is not assigned, there will be a new group assignment. If the group is already assigned, there will be no change. If the group specified in the role does not exist, a warning exception will be logged: "Group <group-name> could not be assigned to user <user-id> because the group does not exist in FileHold."

If a user is assigned a group in FileHold and that group does not exist in the AAD role, there is no change in FileHold. The AAD role is linked to the group by creating a role name that matches the following pattern: **FileHoldGroup.<name-or-GUID>**. Where name is used, it must be an exact match for a FileHold group name. Where GUID is used, there must be a FileHold group with the GUID as its internal object identifier.

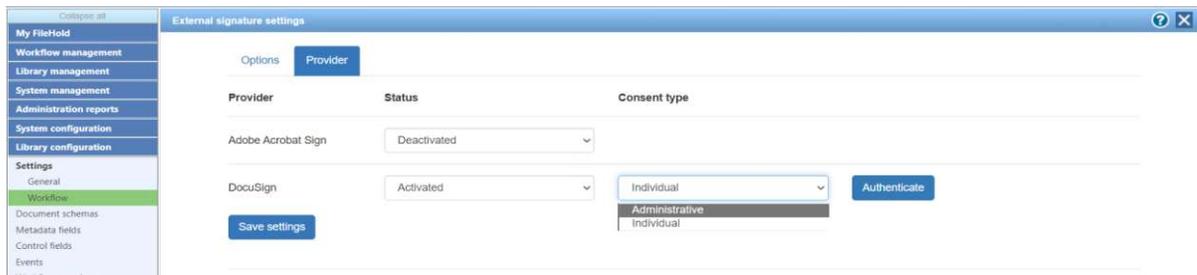
4. DOCUSIGN

DocuSign is the fast, reliable way to electronically sign documents and agreements on practically any device from almost anywhere in the world. FileHold now supports DocuSign as a signing provider.

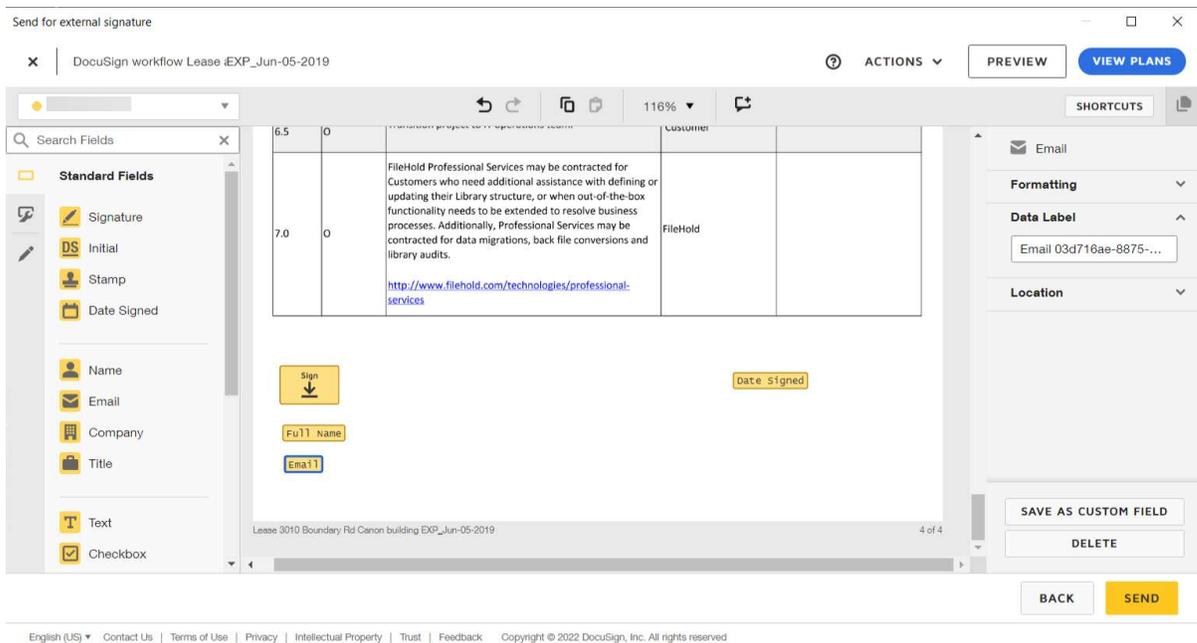
When one or more documents, such as a contract, needs to be signed, they are sent to DocuSign from a FileHold workflow task. This feature is dependent on the customer contracting directly with DocuSign for their e-signature services. External signature requires a feature to be enabled in the FileHold license. Contact sales@filehold.com for more information.

External signature settings are configured in Administration Panel > Library configuration > Workflow > Configure settings page. An Administrative or Individual account can be used with DocuSign. For administrative accounts, administrative consent is used when the administrator of an organization grants permission on behalf of all users in the organization. For individual accounts, each user must grant the FileHold application permission to send a document for signature on their behalf. DocuSign displays a confirmation message saying that the FileHold application is requesting permissions to create and send envelopes and impersonate the user

to obtain consent. This only needs to be done once for each user as long as the DocuSign authentication token is left active.



The workflow template must be set up with an "External signature" activity in order to send a document to DocuSign. External signature participants are called "Authors" in the workflow template. Once the workflow is assigned to the author, the author prepares the document for signature for the signers.



Authoring an agreement using DocuSign

Once the document has been sent from DocuSign, an email notification with a link to DocuSign is sent to the recipients. Once the agreement is signed, DocuSign will automatically send the signed documents to the FileHold server. These signed documents will be checked in as new versions of the originals.

A "Send for external signature" or "Wait for external signature" task can be overridden when using an external signature workflow. This option can be used in the event that a document is sent to DocuSign but the signature is effectively optional. If a DocuSign task is overridden, the status of "Overridden" is displayed in the workflow status report as with other overridden tasks. In the External Signing Report, the status is "deleted".

| Reviews & Approvals Status Report | | | | | | | | | | |
|--|-----------------------------|----------------|--------------------|--------------------|---|-------------|--------------------|--------------------|-------------------|------------|
| Workflow Name | Main / Supporting | Initiator | Started | Due | Completed | Status | | | | |
| DocuSign workflow Lease :EXP_Jun-05-2019 | 1 / 0 | Show Documents | 7/14/2022 10:14 AM | 7/15/2022 10:14 AM | 7/15/2022 1:41 PM | Completed | Details | Changes | | |
| Activity | Type | Task | Participant | On Behalf of | Comments | Attachments | Started | Due | Completed | Status |
| 1 | Send for external signature | 1 | | | | | 7/14/2022 10:14 AM | 7/15/2022 10:14 AM | 7/15/2022 1:41 PM | Overridden |
| 2 | Wait for external signature | 1 | DocuSign | | The envelope was successfully cancelled at DocuSig... | | | | 7/15/2022 1:41 PM | Overridden |

If at some point a customer wishes to switch from one electronic signature provider to another, there may be agreements outstanding from the old provider. These documents are processed as normal; however, new agreements can only be sent out for signature using the new provider.

5. FILEHOLD VIEWER

New file formats are supported in the level 2 and 3 viewers:

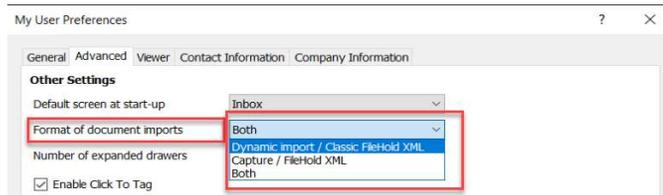
- pptm
- xlsx

6. SCANNING AND IMPORTING

6.1. New labels for the FileScan bridge

The list options for the “Format of document imports” list in the User preferences and the FDA advanced settings in the client options have been modified.

| Label in 16.3 and lower versions | Label in 17.0 |
|----------------------------------|---------------------------------------|
| Quick Scan Pro | Dynamic import / Classic FileHold XML |
| Capture | Capture / FileHold XML |



FDA user preference



Client options > FDA advanced settings in Administration panel

6.2. SmartSoft Capture Plus licensing

SmartSoft Capture Plus now has separate licensing from SmartSoft Capture. When logging into the FileHold Desktop Application (FDA), the system now checks if there is a SmartSoft Capture Plus license is available for use.

The number of SmartSoft Capture Plus licenses can be viewed on the Licensing > Information page.

| | |
|----------------------------------|---|
| Capture concurrent sessions | 5 |
| Capture Plus concurrent sessions | 5 |

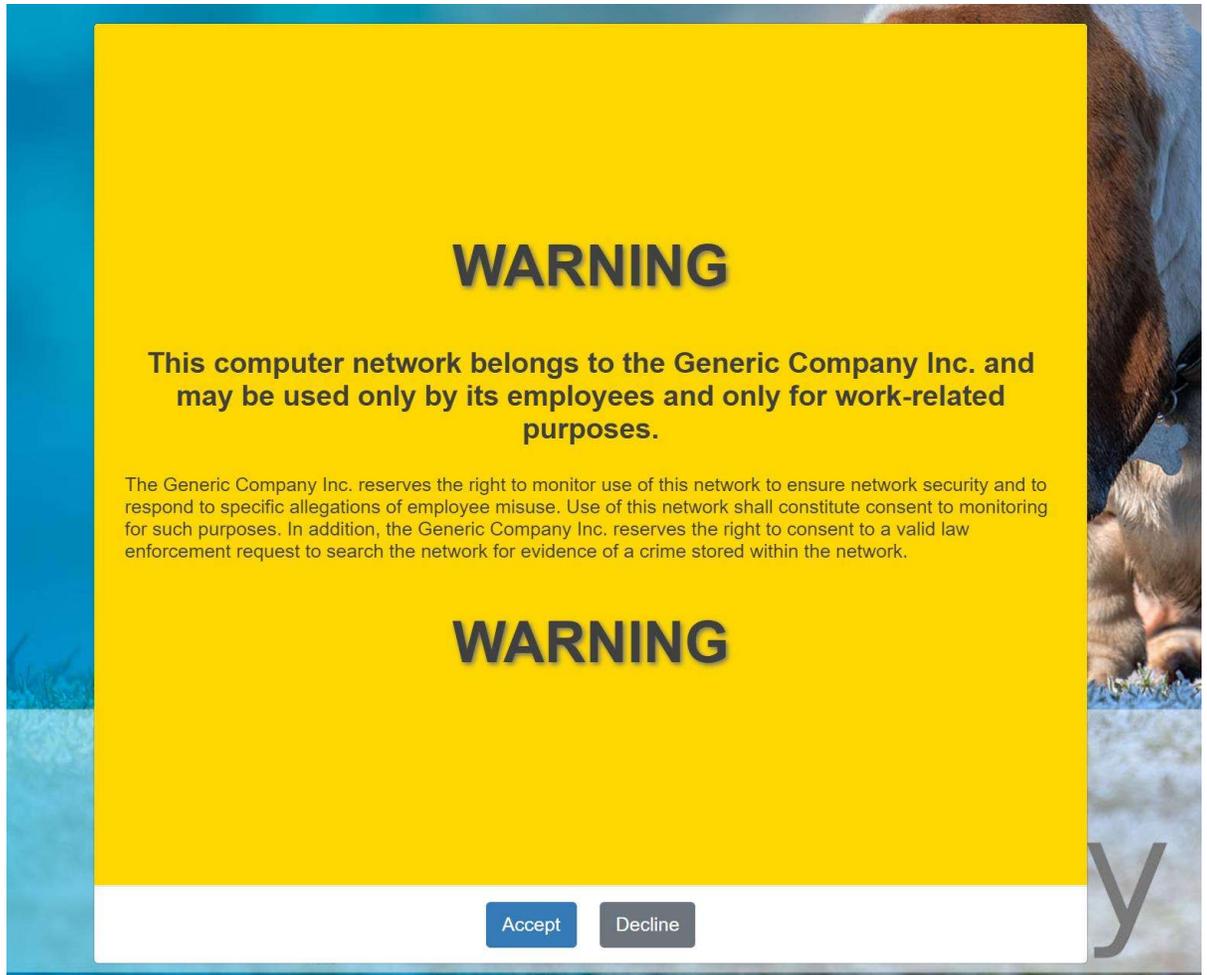
7. FILE COMPRESSION

If the compression feature is enabled in the FileHold license, the system attempts to compress PDF and Tiff files to a smaller file size. If the file was already compressed, compressing it again may make it larger. In this case, the compression attempts can be abandoned if the setting "PdfCompression_AbandonNegativeCompression" is enabled in the document repository web config file. The default is set to true. If enabled, the error message displays in the OCR and compression queue report, "Compression resulted in <x>% larger file, so compression attempt abandoned."

| | | | | |
|--------------------------|-------|---------------------|----------------------------|--|
| <input type="checkbox"/> | Error | 441 | 2022-06-22 12:03:44 +02:00 | Compression resulted in 70.08% larger file, so compression attempt abandoned. |
| <input type="checkbox"/> | Error | 440 | 2022-06-22 12:00:54 +02:00 | Compression resulted in 433.67% larger file, so compression attempt abandoned. |
| <input type="checkbox"/> | Error | 257 | 2022-06-20 13:47:03 +02:00 | Compression resulted in 99.83% larger file, so compression attempt abandoned. |
| <input type="checkbox"/> | Error | 436 | 2022-06-15 14:58:48 +02:00 | Compression resulted in 84.12% larger file, so compression attempt abandoned. |

8. WARNING BANNER

A Windows administrator can configure the post log in behavior to display a message to users before they access the system. This would typically be used to provide users with conditions-of-use type information. The user can optionally be forced to press a button to exit the banner. The content of the banner comes from a user provided web page. One or two buttons can be configured to give users an option to accept or decline to continue with the session.



User responses to the banner are logged in the user activity report. Clients that do not support the banner handshake are logged as not applicable. All standard clients starting with version 17.0 support the banner handshake.

| Full name | User login name | Client | Version | Connection pool | Client address | Terms | Logged In | Logged Out |
|-----------|-----------------|-------------------|--------------------------------|-----------------|----------------|------------------|----------------------------|----------------------------|
| sysadm | sysadm (1) | WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Accepted | 2022-08-23 18:39:55 -07:00 | Active |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Accepted | 2022-08-23 18:39:12 -07:00 | 2022-08-23 18:39:45 -07:00 |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | No user response | 2022-08-23 18:37:45 -07:00 | 2022-08-23 18:39:02 -07:00 |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Accepted | 2022-08-23 18:36:46 -07:00 | 2022-08-23 18:37:40 -07:00 |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Declined | 2022-08-23 17:19:15 -07:00 | 2022-08-23 18:36:40 -07:00 |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Not applicable | 2022-08-23 17:18:13 -07:00 | 2022-08-23 17:18:55 -07:00 |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Not applicable | 2022-08-23 17:12:46 -07:00 | 2022-08-23 17:18:09 -07:00 |
| | | com (4) WebClient | 17.0 (FileHold17.0_20220811.1) | Full | 192.168.110.1 | Not applicable | 2022-08-23 17:12:46 -07:00 | 2022-08-23 17:18:09 -07:00 |

9. MISCELLANEOUS ENHANCEMENTS

- The installer for the obsolete Brava viewer has been removed from the FileHold Desktop Application installer. If you have a legacy Brava license and you still would like to use the Brava viewer, use the stand-alone installation file. The Brava viewer with FileHold is an end of service product and is not guaranteed to work with current or future versions of Windows. The Brava viewer does not receive security updates or bug fixes. All customers should plan to retire this technology as soon as possible.
- Adobe Sign is now Adobe Acrobat Sign. Terminology in the product has been updated accordingly.
- The FileHold Desktop Application now supports TLS 1.3 when enabled on the server.

- The baseline technologies for the application server have now been updated to the .NET Framework 4.8 and .NET Core 6.
- There are various performance improvements on the application server and for the FileHold Desktop Application.

10. RESOLVED ISSUES

| ID | Title |
|-------|--|
| 15504 | (FDA) When using the long date format and the "between" operator, the date is cut off. |
| 16133 | (Viewer) Cropped content for text/table/graphic exceeding the standard page size for formats MSG and EML. |
| 16134 | (Viewer) No special characters are displayed for formats MSG and EML. |
| 16153 | Wrong words highlighted in the "Search Results" when using "Highlight Results" after upgrading from 16.1.1 |
| 16273 | Invalid custom naming for workflow with currency/number field. |
| 16275 | Invalid custom naming for workflow with drilldown field. |
| 16290 | Ambiguous user and date information displayed in the version properties of a document after changing its ownership. |
| 16295 | (FDA) Missing 'restarted workflow' entries from the list of exported workflows in csv file/HTML report. |
| 16296 | Overriding both "Send for..." & "Wait for..." External Signature activities results in an insufficient permission exception. |
| 16300 | Portal alias user requires an email address. |
| 16304 | The workflow email notification for the workflow observer and workflow participant contains different information in the history tag. |
| 16321 | (Web Client) Misleading message after approving workflow task several times when using classic task interface. |
| 16334 | Cannot save role membership changes of any FileHold group if 'sysadm' was removed from the 'System Administrators' group. |
| 16356 | A 'FileHold viewer level 2' license cannot be assigned to a limited or a portal alias user. |
| 16359 | (WebClient) Unable to update auto-tagged folder properties when changing a dropdown metadata value to blank. |
| 16360 | (Web Client) "Insufficient permission..." error occurs when unchecking "Show all document schema formats" in Add Document Wizard in some cases. |
| 16363 | (FDA) Failed to cancel the upload of a large file which occurred first in the "View All Files in Transfer" list. |
| 16368 | (Courier portal) 'Approve' button should show up upon downloading or viewing the document without manually refreshing the screen. |
| 16375 | The "Files belong to more than one schema" option appears when editing multiple files of the same document schema. |
| 16377 | (Workflow) Dashboard go to "First" and "Last" links do not work. |
| 16378 | Limited or portal alias users may be available for selection during workflow delegation causing an error if selected. |
| 16392 | (FDA)The folder view does not refresh when saving an edited document. |
| 16393 | Senior Library Administrator and Library Administrator may not have permission to see new library structure in some cases where they should have permission. |
| 16405 | (Assemble) Custom naming not producing correct results in some cases with merged assembled documents. |
| 16452 | Incorrect behaviour for Author field of the comments section of the viewer level 2/3 user in certain cases. |
| 16454 | (Web Client) The "Edit" document name option is shown in the "Linked documents" panel but it does not allow editing. |
| 19786 | (FDA) Error occurs when merging an offline document with an electronic document during document assembly. |
| 19860 | (FDA) Export to Excel does not work with User Management when there is more than one page. |
| 19862 | XML markup is not available for use in watermarks. |
| 19869 | Fine margin control in watermarks is not possible. |
| 22708 | (WebClient) Switching views in the linked document panel also changes the folder views. |
| 22713 | (FDA) Changes to metadata after editing multiple files are not immediately visible because the folder is not automatically refreshed. |

| | |
|-------|--|
| 22720 | (ADI) Trailing spaces in file extensions are ignored. |
| 22721 | Setting "Advanced Search" or "Simple Search" as default page after login bypasses restrictions set for group with disabled ad hoc searches. |
| 22726 | (Web Client) Cannot view old document version using document direct URL access when "hide until approved" option is enabled. |
| 22729 | (FOC) User was prompted with the 'Check this document out?' after saving a working document with the intention of adding it as a new file. |
| 22733 | Closing the FileHold viewer pane does not exit annotation mode (locked markups) for all opened documents in the pane. |
| 22740 | (FDA) Misaligned display of document in the viewer if the scaling settings of screen was set to 150% or greater. |
| 22741 | (FOC) Warning dialog related to an older FDA version connecting to a newer FileHold server version appears behind main screen. |
| 22754 | (FDA) 'Add a new virtual folder' option is disabled for users with Cabinet Administrator role or lower role. |
| 22756 | Multiple versions of the same document appear in the "My Recently Accessed" documents list after viewing or downloading the latest version |
| 22757 | Numeric in-the-list saved quick searches retain the values for the variable field after it has been saved. |
| 22758 | An insufficient permission exception occurs when trying to delete multiple files while one of them has an active viewing courier transmission. |
| 22760 | (FOC) User was prompted twice with the 'Check-in document?' alert upon saving & closing a checked-out Visio file. |
| 22772 | (FDA) Quick saved search related to Number metadata field executed from the simple search bar yields a random search filter value. |
| 22774 | Archived document(s) which went through workflow do not appear in the 'Documents associated with the workflow document' page when accessed through the Workflow Status report. |
| 22776 | Workflow is orphaned when all associated workflow document(s) are deleted. The workflow should also be deleted. |
| 22778 | (FOC) Failed to detect the latest version of the document was checked out. |
| 22781 | (FDA) Boolean search option in the Advanced search is still disabled after enabling it the saved the search settings. |
| 22782 | (FDA) Missing 'Add Offline' button from the Inbox list. |
| 22783 | FileHold viewer resets zoom when moving between documents. |
| 22785 | (FOC) COM add-in causes instability when an Excel file is stored/opened to/from OneDrive. |
| 22786 | (FDA) An unexpected error occurs when user tries to enter a folder with a default schema of which they are not a member. |
| 22790 | (FDA) Cancelling from overwriting/opening a local copy of a file generates an exception if Document Name is duplicated. |
| 22793 | Repository space check returns zero space when there is an error instead of capturing the error. |
| 22794 | (Viewer) An old style method is used to get documents from repository with slower performance than current method. |
| 22795 | Upgrade tool should check/report details of 'compatibility_level' of all FH databases. |
| 22798 | (FDA) Non-owner of a cabinet unable to add a file associated to a schema with an 'electronic record' default format. |
| 22807 | (ADI) Exception attempting to reprocess a file that had originally had an error. |
| 22811 | Wrong date display format used in a custom-named document when the field mask is not specified. |
| 22812 | Wrong document version number in usage log after copying document. |
| 24017 | (FHIT) Unable to automatically recover password for disabled sysadms or when there is no valid sysadm. |
| 24018 | Database dropdown synchronization and Active Directory synchronization scheduled to start at the same time. |
| 24019 | (FDA) Cannot click on the second search filter row of an advanced search if the 'Boolean Search' option was enforced. |
| 24031 | (FDA) It is not possible to add an Electronic Document / Record to a folder that has a different format set for default schema. |

| | |
|-------|---|
| 24032 | Unexpected error after clicking the 'Restore defaults' button found in the System configuration search settings. |
| 24051 | (FOC) Default folder schema overwrites selected schema when adding a new document from Office. |
| 24056 | Exception occur when users open a folder containing a document associated two workflows in a specific scenario. |
| 24073 | (FullTextSearch) Folder or schema search times out for folders and schemas associated with a large number of documents. |
| 24082 | Active limited concurrent sessions exceeded the licensed amount. |
| 24083 | (API) User activity report Connection pool column is "undefined" if the optional 'CheckApiVersionAndLogClientInfo' method is not called by a custom client. |
| 24089 | (FDA) For some cases, the FDA appears inactive or frozen when adding large documents (>100MB). |
| 24101 | Wrong document(s) appear in the 'Associated workflow documents' bottom pane upon selection of a different task in the list for some cases. |
| 24102 | (FDA) Some lookup fields filled by the lookup value were not automatically checked when performing a mass edit. |
| 24123 | (FDA) Checkbox(es) were not automatically checked for metadata fields which have been filled out when performing the mass-edit using the 'Load metadata from a file'. |
| 24125 | (FDA) Exception after selecting documents from inbox and document tray using the control key in some cases. |
| 24129 | (Compression) Color detection missing from compression optimizations. |
| 24131 | "File only" search criteria not passed to the viewer when opening a document from search results. |
| 24139 | (FDA) Mouse-wheel scrolling does not work in the My workflow tasks list once enough tasks exist that the scrollbar appears. |
| 24153 | PDF extraction rule does not copy all the values when the source document has a multi-select drop down field. |
| 24161 | (FDA) It is possible to create multiple conflicting extraction rules for the same PDF form. |
| 24162 | (FDA) Wrong value extracted from PDF form related to a 'Checkbox' metadata field if its initial value is 'Checked'. |
| 24165 | (FTS) Certain dtSearch operators are not properly handled the simple search case. |
| 24166 | (FTS) Certain dtSearch keywords are not available in a boolean search. |
| 24172 | (FTS) "##.*tu.* ##.*mu.*" will produce a syntax error about unmatched parenthesis in a raw query. |
| 24173 | (FTS) Syntax error when the dtSearch xfilter operator used with a simple search. |
| 24181 | (FDA) Exception occurs using a MultiComboBox in some cases. |
| 24183 | (FDA) Wrong values are highlighted in 'Document Text Snippets' panel when performing 'Contains in FTS' of a phrase with quotes. |
| 24186 | (FDA) "Ctrl+double-click" on a file to check out and open does not function if double-click to open in the viewer is enabled. |
| 24188 | (FTS) Invalid values are highlighted after searching in .zip files. |
| 24192 | (FDA) Reviews & Approvals > Workflow status report performance poor depending on number of workflows per page. |
| 24193 | (FHIT) Some FH scheduled tasks were not updated with the correct FH service account credentials after running the service account change. |
| 24194 | Formatting issue of some text found in some files when opened in the FH viewer or after Convert-to-PDF. |
| 24196 | The "Delete" event does not work for files in the Library Archive. |
| 24254 | Poor performance for some cases related to workflows. |
| 24255 | Document cannot be added to the workflow as main if the review activity has been completed. |
| 24256 | Restarted workflow shows up as an option for adding a new document to workflow. |
| 24258 | (FHIT) Automatic web client portal configuration not available. |
| 24275 | (AD synchronization) Exception synchronizing special case in domain that should be ignored. |
| 24284 | (FOC) Problem with saving files to Teams with the FileHold Office add-in enabled. |
| 24301 | 3000 page document causes viewer exception instead of message about maximum document size. |
| 24305 | Poor performance with certain scenarios with linked documents. |

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| 24309 | Certain character sequences invalid for passwords. |
| 24310 | Digital signature log entry is not stored if an error occurs in transaction. |
| 24311 | (FTS) In the list operator on document schemas ignores some schemas. |
| 24312 | Notifications about recurring events are sent when a new document is added. |
| 24326 | "Workflow GUID" found in the Details column of the document usage report is not a hyperlink. |
| 24327 | No option to unselect any folder from the 'Set Destination Folder' field when using the 'indirect metadata > auto-filing' option in the Watched folder settings |
| 24395 | (API) Incomplete description of 'GetUserGuid' method of UserPreferences in the API documentation. |
| 24428 | Registration issues when users are forced to provide a mobile phone number when creating an account. |
| 24444 | (FDA) Getting 'Chrome is out of date' alert from the integrated browser when opening the Authentication screen in Duo. |
| 24470 | Cannot check-in a new version of an assembled document when the original has an offline format. |
| 24493 | (Viewer) Cannot navigate to an URL without an FDQN. |
| 24494 | (Viewer) Embedded documents cannot be downloaded. |
| 24495 | (Viewer) No error message is displayed when there is an attempt to execute JavaScript in the browser. |
| 24496 | (Viewer) FDA documents links cannot be opened. |
| 24497 | (Viewer) Some of hidden cells are visible for XLSX documents. |
| 24516 | (FDA) Pressing ESC after making some annotations on a file closes the window entirely and changes are lost when automatic opening of a document in the viewer is enabled. |
| 24523 | "Initials" field is set as mandatory on the self registration page. |
| 24526 | (WebClient) Display format for Short date in the metadata panel does not display correctly while in Edit mode. |
| 24540 | (FDA) CTRL+<double click> Check Out & Open, opens wrong document in some cases. |
| 24541 | (FTS) "Does not equal" library location does not produce expected results. |
| 24596 | (FDA) Large file uploads can be slow. |
| 24622 | (FDA) Unexpected error occurred upon pressing on the TAB twice then pressing ENTER with the document in inline Edit mode. |
| 24623 | (FDA) Selected value is being erased when performing inline editing of dropdowns in the document list using TAB or ENTER. |
| 24624 | (FOC) Cannot check back in an offline document as an electronic document even with the correct permissions. |
| 24629 | Cannot change document schema after selecting one in advanced search. |
| 24635 | Browse For Folder dialog in FDA can appear to freeze when there are network or other slow devices to display. |
| 24637 | Ambiguous error message in FDA when there is no space in repository. |
| 24639 | Unable to connect to Progress Open Edge ODBC. |
| 24644 | (FDA) Right-clicking URL metadata field value executes URL instead of bringing up context menu. |
| 24648 | (FHIT) Unexpected error while changing the service account. |
| 24682 | (FDA) Wrong search value from the simple search bar in special case. |
| 24694 | Library archive documents are not viewable in a virtual folder. |
| 24699 | (FDA) Timeout in Reviews & Approvals > My Tasks when user has over 90 000 workflow tasks assigned. |
| 24702 | (WebClient) An unnecessary warning message about reindexing files appears on a repository change. |
| 24711 | (FHIT) Cannot import portal alias user when it is not associated with an email. |
| 24717 | Domain users missing from list of internal users when sending a Courier transmission. |
| 24731 | (FDA) When user presses "Submit" to complete a workflow task, the page takes a long time to load for certain datasets when using the new task interface. |
| 24752 | (FDA) The FDA window does not come to the front of the desktop when user feedback is expected. |
| 24759 | (WebClient) Searching for the types "In List / Not In List " for database dropdown metadata fields using "Search by" option causes an error. |

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| 24769 | It is not possible to select document viewer settings if the system is only licensed for FileHold viewer level 3. |
| 24774 | Watermark text is cut off. |
| 24779 | (FDA) Unnecessary delay selecting folders. |
| 24782 | Column sort in User management does not work. |
| 24794 | Unable to auto-file to an auto-tagged folder via the add document wizard. |
| 24804 | (API) ScanningManager.SetSettings AutoFile parameter does not work when there is an auto-filing template. |
| 24805 | Simultaneous workflow initiation on the same document causes exception in certain cases. |
| 24814 | (FDA) Unable to add document to auto-tagged folder using auto-filing with specific scenario. |
| 24841 | (C2PDF) Multiple unnecessary warnings appear in the Windows Event Viewer after converting a PDF Form file. |
| 24859 | (FDA) Undocked viewer does not come to the foreground on the desktop. |
| 24898 | Documents in the library archive do not appear in the document tray panel. |
| 24899 | (WebClient) Archived document is not visible in favorites list. |
| 24900 | (WebClient) Archived document is not visible in recently added list. |
| 24901 | (WebClient) Archived document is not visible in recently accessed list. |
| 24916 | Default repository warning and free space thresholds do not match the specification. |

11. KNOWN ISSUES

| ID | Title |
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| 8530 | (FDA) Word table not correctly formatted in Brava viewer. Users should use the FileHold viewer level 2. |
| 9128 | (FDA) Part of the today's date is not a link in Document Usage Log. |
| 11371 | Document assembly may not work with very large files (> 2GB). |
| 13556 | (FDA) Viewer state not correctly restored after workstation sleeps or hibernates for an extended period. |
| 14982 | Assemble or convert to PDF add wrong characters to finished PDF file when necessary fonts are not installed on the application server. Users should ensure the necessary fonts are installed on the server. |
| 15349 | Missing bottom border from the participant responses section of a workflow email notification opened in Outlook or in Word. |
| 24334 | Users effective permissions in a cabinet or folder conflict when a user is a member of groups with both "Organizer" and "Organizer & Delete" roles. |
| 22747 | (FDA) Error thrown when adding a file of 1GB or greater with a drop-down list of 100,000 items or more. |
| 22763 | (Viewer) A FileHold level 1 viewer license does not correctly format Word document with Arabic text. |
| 24627 | (Viewer) HTML documents or documents that contain HTML content such as email require that the Google Chrome browser is installed on the web client server. |
| 24883 | Windows event viewer may contain unnecessary warning message "The cookie '.AspNetCore.Correlation.YV9HJNkNXb0v6bWJWQwloByVrqVCyIAGWNFaGM4qCKs' has set 'SameSite=None' and must also set 'Secure'." |
| 24889 | A warning notification will not be sent about the repository threshold if the warning level is set to the same value as the repository threshold. |
| 24921 | The orphaned (all documents deleted) workflows garbage collection does not remove workflow task attachments. |
| 24930 | A link between the built-in "Domain Users" group and a domain proxy users has no apparent effect. |
| 24931 | (FHIT) The FHWc3AppPool user is not updated when a service account change is performed. |
| 24938 | (OCR) An unnecessary message is added to the Windows event viewer: "There is no pending file associated with the token 00000000-0000-0000-0000-000000000000." |
| 24939 | The merge tag function "DateOffset" only works with a single document. |