



# FileHold

Document & Record Lifecycle Software

**RELEASE GUIDE**

**VERSION 17.1.2**

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## 1. FILEHOLD 17.1 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 17.1.

## 2. SYSTEM REQUIREMENT CHANGES FOR FILEHOLD 17.1

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. No longer supported platforms

Customers running on the following platforms will not be able to upgrade or install.

- Microsoft Windows Server 2012 and 2012R2.
- Microsoft SQL Server 2012
- Microsoft Office 2013.

### 2.2. Newly supported platforms

- Duo Universal Prompt – existing customers only.

### 2.3. Deprecated platforms

These platforms are available for existing installations only. Customers should plan to transition off these solutions in the future.

- Duo Multi-factor Authentication – this does not affect using Duo with an external identity provider such as Entra or Okta.

## 3. MICROSOFT TEAMS INTEGRATION

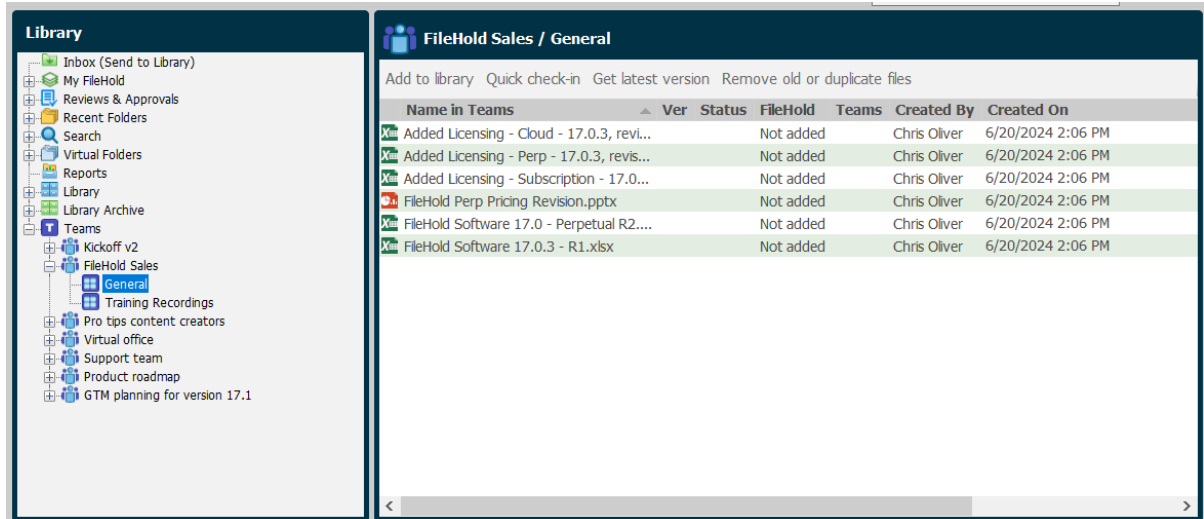
Microsoft Teams integration is now a standard feature available to all customers. Teams is a common tool for collaborating on documents and allowing multiple users to view and edit documents at the same time. The FileHold integration with Teams allows you to apply normal controls to these documents as though you were working with them on your local workstation, but they exist in Teams.

### 3.1. Requirements for Teams integration

Users must be licensed by Microsoft to use Teams, and they must authenticate to FileHold with their Microsoft credentials using our optional integration with Microsoft Entra Authentication.

### 3.2. Microsoft Teams integration elements

Your Teams will appear below the FileHold Library Archive in the library panel.



Once synchronized, users will be able to do the following:

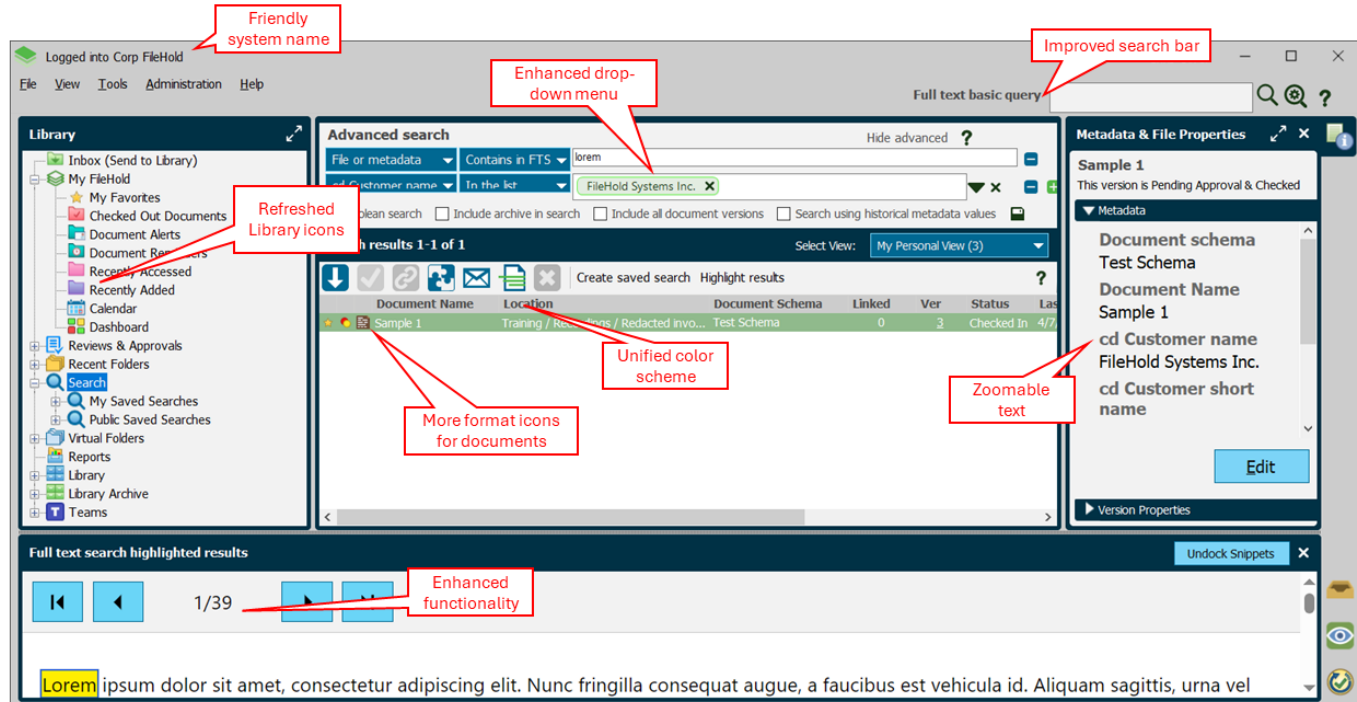
- Add FileHold documents directly to a Team
- Add Teams documents directly to FileHold
- Delete Teams documents once added to FileHold
- Check documents out of FileHold to Teams

## 4. USER INTERFACE ENHANCEMENTS

The user interfaces for both the FileHold Desktop Application (FDA) and the web client have been refreshed.

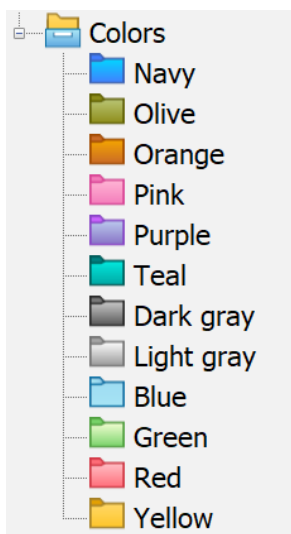
### 4.1. Refreshed look

A revised and constrained color palette has been introduced for the DMS cockpit. Users will notice a more consistent use of color in menus, backgrounds, and highlights. Elements, such as graphical buttons and symbols for document types, have also been refreshed.



There are new icons for the Library, document or record extensions, FileHold tools and drop-down menus, and permissions.

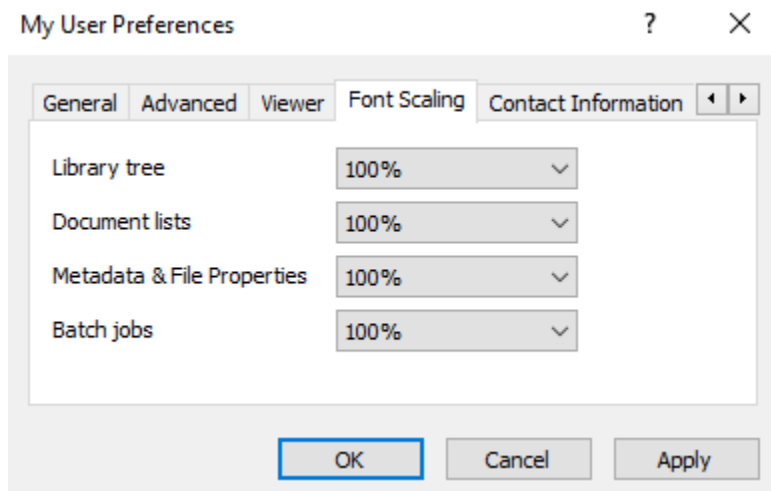
Eight new colors, in addition to the four existing, have been added to the options for coloring folders in the library tree.



#### 4.2. Scalable panels on the FDA

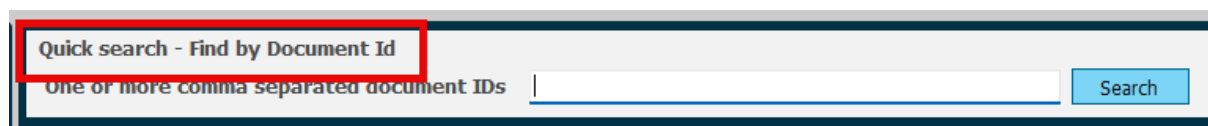
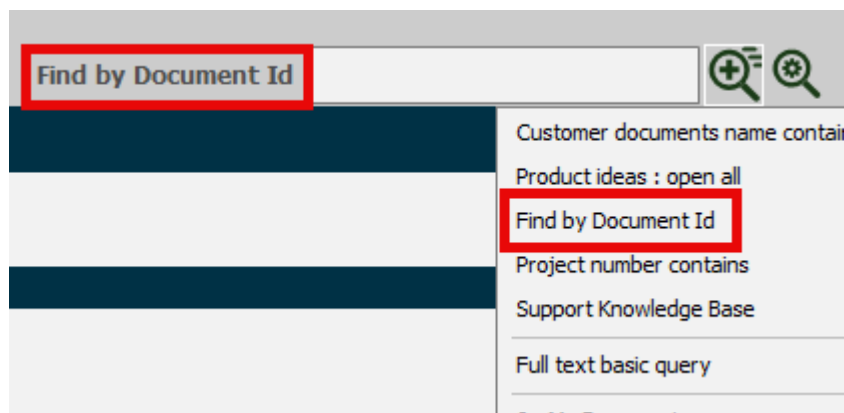
Elements of FileHold Desktop Application (FDA) now have scalable fonts. The content in the following four panels can be scaled: library tree, document lists, metadata panel, and the batch jobs list. Users can now use their mouse wheel while holding **Ctrl** (or hold **Ctrl**+scroll

gesture) to actively zoom in or out, or directly select the scaling they want in the user preferences.



#### 4.3. Changes to searching for documents

There are now easier to identify search selections for the FDA simple search box which now shows the currently selected search method.





When creating a quick search, users will now be able to define a custom search prompt for the users:

When run, the quick search will now show the title for the quick search as well as the custom search prompt, which can be used to provide the user with more precise information:

Finally, there has been a change to the name of the button for creating saved searches. Previously it was **Save as Saved Search**. It is now **Create saved search** providing users better information about its actual function.

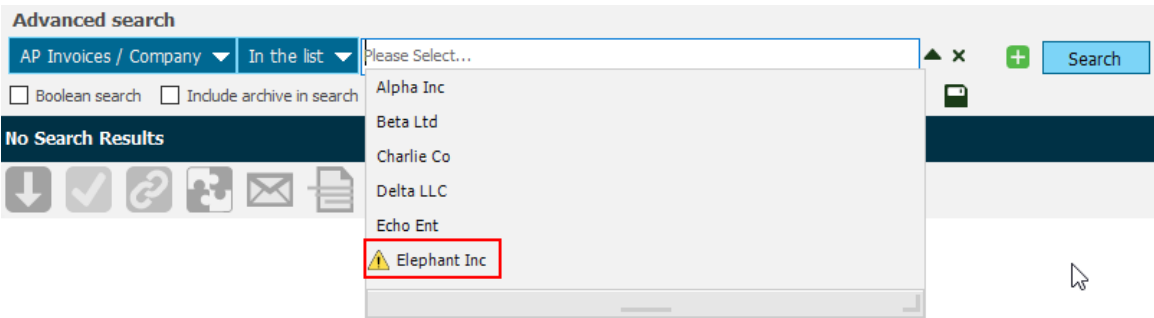
#### 4.4. Dropdown menu improvements

##### 4.4.1. Active / inactive option for drop-down lists

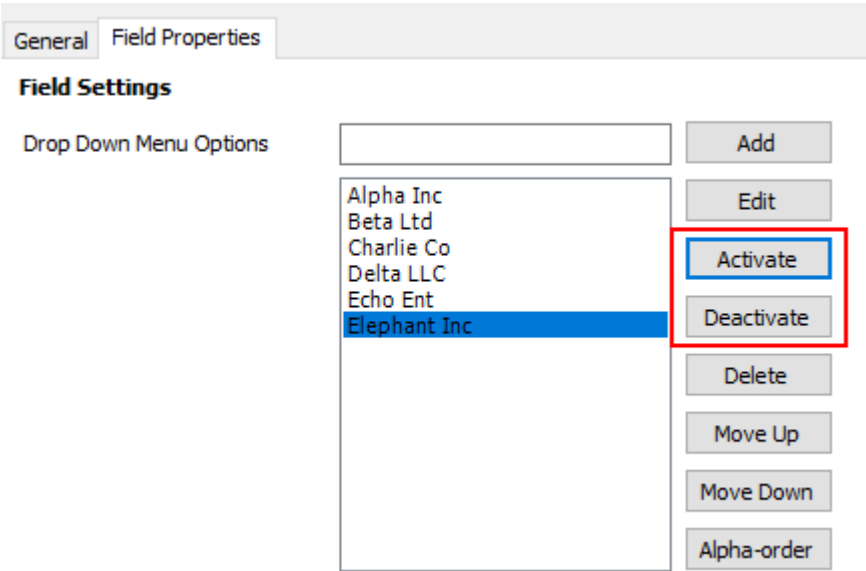
Dropdown menu values can now be **active** or **inactive**. When a value is **active**, any user can select it from the list. When a value is **inactive**, it is only available for selection in a search or for administrators.

Visual clues including coloring and icons will distinguish between active and inactive items.

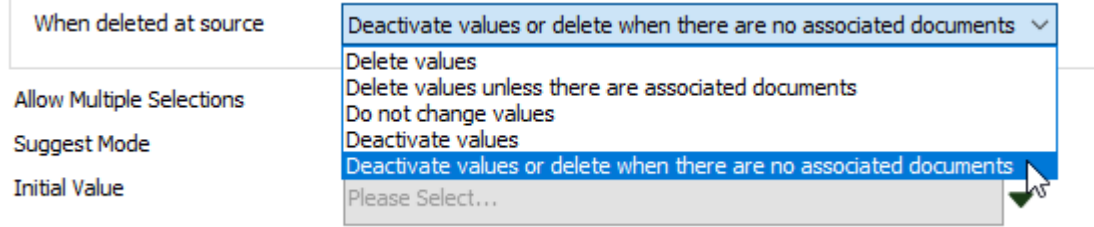
A menu item that has been deactivated will appear in the dropdown menus with a warning to indicate to users it has been deactivated:



FileHold managed dropdown menus have two new buttons on their management page: [Activate](#) and [Deactivate](#).

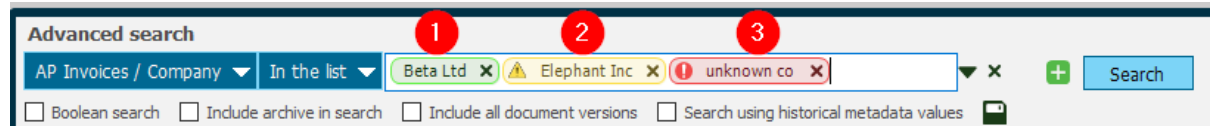


Activate and deactivate for database managed dropdown menus are automatic depending on the **“When deleted at source”** configuration. Administrators can choose to deactivate values when they are deleted or they can delete them from the list unless there are associated documents in which case they can have the values deactivated. This is the default setting for any new dropdown menus.



#### 4.4.2. New style for dropdown menu display and editing values

The “pill” style has been incorporated to visualize and control dropdown menu selections. This style is used equally for dropdown menus with both single and multiple selection options. Each pill is a rectangle with rounded corners, an indicating color and icon, and a clear button.



The dropdown menu can be expanded with the down arrow to the right of the input box or by simply typing. Selections can be made by directly selecting from the list or by typing some, or all, of the value into the field.

Green pills represent the normal case and do not have an indicating icon. Yellow pills are inactive values and red pills are invalid user entries.

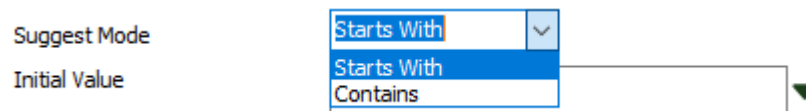
In a single select dropdown menu, either the clear button can erase the pill, or a new value can be typed or selected.

A multi-select dropdown menu includes a clear all button to the right of the input box.

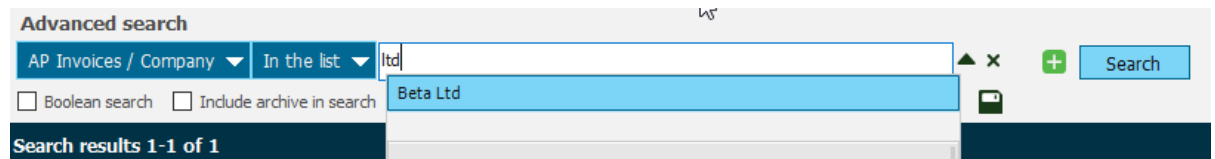
Invalid entries are shown in a red pill to illustrate a mis-entry and they will be ignored when the document is saved.

#### 4.4.3. New suggest mode for selecting values

A Contains option has been added to the preexisting Starts with mode of selecting values in a dropdown menu. When you are choosing a value by typing, contains will look to all parts of the value to provide a list of possible selections. This is configured in the metadata field settings:



Contains narrows the list of values in the same way as the Starts with mode, but the search is not locked to the first character of each value.



#### 4.5. Anonymous Portal enhancements

It is now possible for administrators to more closely control the information that is available to anonymous users beyond the normal role-based permission controls.

- It may be confusing or otherwise undesirable to provide a library and library archive browsing view when a saved search is more appropriate. Both the library and library archive can be disabled using the managed options [AnonymousPortal.DisableLibrary](#) and [AnonymousPortal.DisableLibraryArchive](#). The defaults are enabled (false).

- The version link and right click menu can be disabled using the [AnonymousPortal.DisableVersionHistory](#) managed option. The default is disabled (true).
- Buttons that were always disabled for the portal are no longer visible.

#### 4.6. Highlight Results enhancement

Highlight results can provide a text view of documents after a **Contains in FTS** search has been performed. This text view highlights the contents of the file that were a part of identifying the documents in the search results. These highlights are improved with easy-to-use buttons for jumping forwards and backwards through the places in the file where the search criteria found text.

The screenshot shows the 'Advanced search' interface. At the top, there's a search bar with 'File or metadata' selected and 'Contains in FTS' chosen. The search term is 'lorem'. Below the search bar, there are checkboxes for 'Boolean search', 'Include archive in search', 'Include all document versions', and 'Search using historical metadata value'. The search results are displayed as a table with columns: Document Name, Location, Document Schema, Linked, and Ver. The first result is 'Sample 1' located at 'Training / Recordings / Redacted Invo...' with a 'Test Schema' and 'Linked' status of 0 and 'Ver' of 3. Below the table, there's a section titled 'Full text search highlighted results' with a 'Undock Snippets' button. This section contains navigation buttons (back, forward, first, last) and a text snippet: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc fringilla consequat augue, a faucibus est vehicula id. Aliquam sagittis, urna vel varius pretium, nisi quam fermentum odio, in maximus arcu mi quis ex. Quisque gravida, ex sed congue sodales, arcu tortor convallis mi, sed varius est nibh ac massa. Nullam non justo ex. Aliquam erat volutpat.'

#### 4.7. Document list view configuration improvements

In the FDA, the Reorder Columns option in the column field list has been moved and renamed to Open view editor. Right click on the column header row to show this menu.

The screenshot shows the document list view with a table containing columns: Document Name, Location, Document Schema, Linked, Ver, Status, and Last Modified. The first row is 'Sample 1' located at 'Training / Recordings / Redacted Invo...' with a 'Test Schema', 'Linked' status of 0, 'Ver' of 3, 'Status' of 'Checked In', and 'Last Modified' of '4/7'. A right-click context menu is open over the column headers, showing options: 'Group by', 'Add / remove columns', 'Open view editor' (highlighted), and 'Export grids to CSV'.

This is the same view editor available from [File > Preferences and Settings > View Preferences](#).

When choosing **Add / remove columns**, the selection list now persists and allows the user to select or deselect multiple columns at the same time. The user can click outside of the list to close it.

When right-clicking on the header row and selecting **Add / remove columns**, the user can now select or deselect multiple columns to modify their personal view in the FDA. When complete, clicking outside the menu will close it.

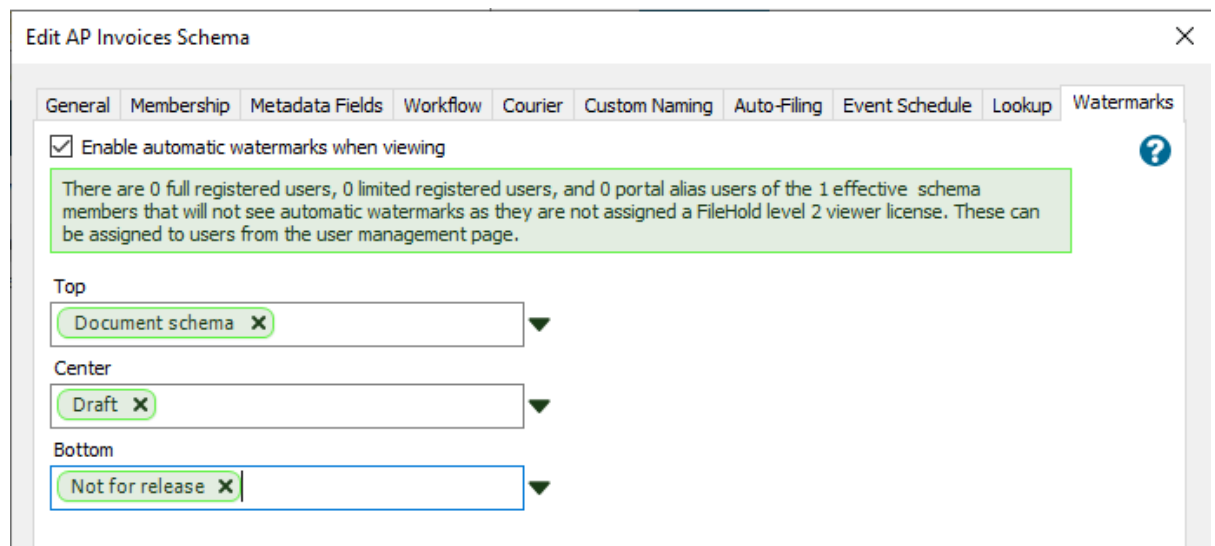
## 5. AUTOMATIC DOCUMENT WATERMARKING

Watermarking is the process of overlaying text over top of a document page. The method for creating watermarks has been available in prior versions of FileHold on-demand with the Assemble feature.

For customers implementing quality management systems (QMS) such as ISO9001, IATF 16949, etc., watermarks are necessary to support their QMS ensuring that the documents used by employees are current even when they have been printed. These watermarks typically include instructions to the user such as “Document not controlled when printed”, or document information like unique identifiers, approval status, approval dates, printed dates, etc.

Automatic document watermarking allows library administrators to configure a document schema and user permissions to ensure watermarks are always included on documents without additional user intervention and without modifying the document itself. These automatic watermarks appear directly in the FileHold viewer and when documents are printed from the viewer.

Schema management now includes a tab for configuring automatic watermarks:



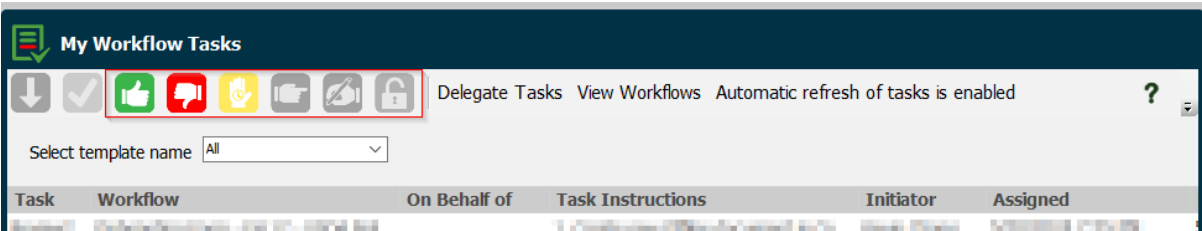
The screenshot shows the 'Edit AP Invoices Schema' dialog box with the 'Watermarks' tab selected. The 'General' tab is also visible. The 'Watermarks' tab contains a checkbox labeled 'Enable automatic watermarks when viewing' which is checked. Below this is a green-bordered box with the text: 'There are 0 full registered users, 0 limited registered users, and 0 portal alias users of the 1 effective schema members that will not see automatic watermarks as they are not assigned a FileHold level 2 viewer license. These can be assigned to users from the user management page.' Below this box are three sections: 'Top' with a dropdown menu showing 'Document schema', 'Center' with a dropdown menu showing 'Draft', and 'Bottom' with a dropdown menu showing 'Not for release'. Each dropdown menu has a close button (X) and a downward arrow. A help icon (?) is located in the top right corner of the 'Watermarks' tab.

Automatic watermarks are available to the same users as with the Assemble feature. A level 2 or higher viewer license is necessary to see automatic watermarks in the FileHold viewer. This allows the automatic watermark feature to be used by full, limited, or portal alias users.

## 6. WORKFLOW & COURIER ENHANCEMENTS

### 6.1. Streamlined workflow task completion

Users working with the new style workflow interface can now complete a task with fewer clicks. They can directly submit review, reserve, approve, not approve, or postpone approval from their My Workflow Tasks screen.



The email template configuration has been updated to provide a similar click reduction for users that would like to complete their workflow task directly from email. They can work from a desktop, web browser, or mobile email to complete the task.

1 workflow notifications follow. Your notification frequency preference is Immediately.

#### Action: Approve Task Assigned

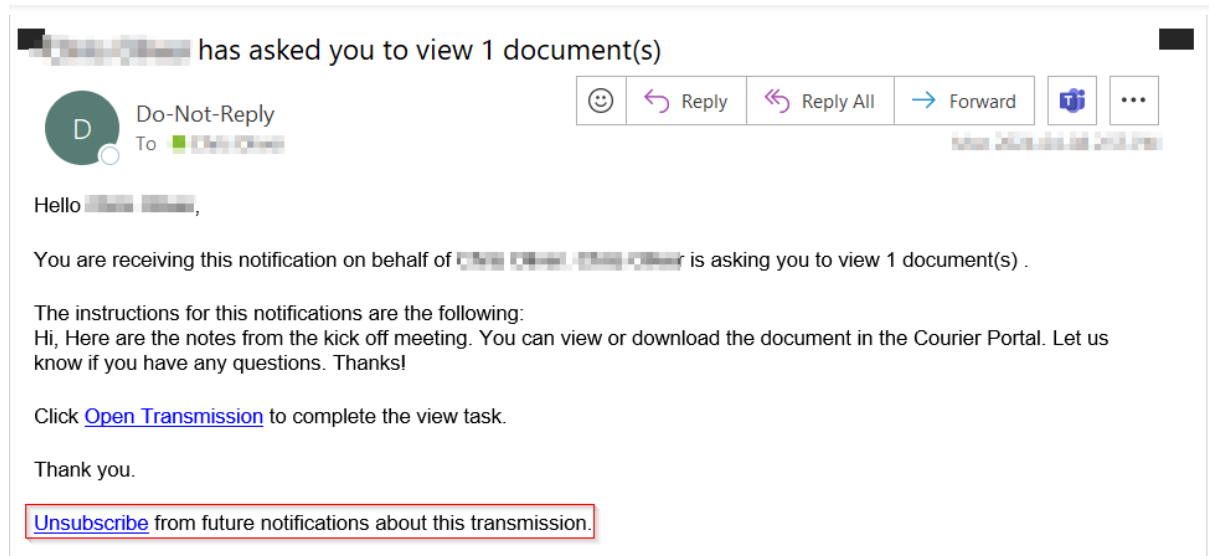
You are receiving this notification as workflow participant. View task in [Web](#), [Mobile](#), or [Desktop](#) client.



Workflow	<a href="#">Training Test Sample 1</a> <a href="#">(Desktop)</a>
Initial document	<a href="#">Sample 1</a> <a href="#">(Mobile)</a> <a href="#">(Desktop)</a>

### 6.2. Courier one-click unsubscribe

Strict compliance with anti-junk email legislation typically requires the use of a one-click unsubscribe in emails. Further anti-junk email tools often look for one-click unsubscribe links when they are grading the trustworthiness of an email. Courier emails now include an unsubscribe link in the transmission email and corresponding unsubscribe page.



### 6.3. Courier password screen improvements

Users setting a password for the first time for Courier transmissions get additional instructions:

The screenshot displays the 'FileHold Courier' password setup interface. At the top left is the 'Courier' logo, and at the top right is the text 'FileHold Courier'. A blue banner at the top reads 'Please set your password'. Below this, a message states: '[Redacted] has requested that you use a password to access your transmission. Since this is the first time you have been requested to use a password, you will need to create a password. Make a note of this password as you will be able to use it to access future transmissions that require a password.' The form includes an 'Email' field with a redacted value, a 'New password' field with a 'Password' placeholder and a strength indicator, and a 'Re-enter new password' field with a 'Password' placeholder and a strength indicator. A blue 'Save password' button is located below the password fields. At the bottom, there is a link 'Learn more about FileHold Courier' and the text 'Courier, powered by FileHold'.

### 6.4. Miscellaneous workflow changes

- A managed option `OcrCompression.CarryForwardLastWorkflowStatus` is now available to address situations where a workflow is executed on a document before the OCR and/or compression process can run. When this option is enabled, if a document that has completed a workflow is processed with OCR/compression, the workflow status will be carried forward to the new document version.
- A new plug-in hook is present on the application server that allows add-on automation like the Workflow extender to add a comment to a workflow task when it is overridden by the automation. For instance, if the Workflow Extender is configured to skip an approval task

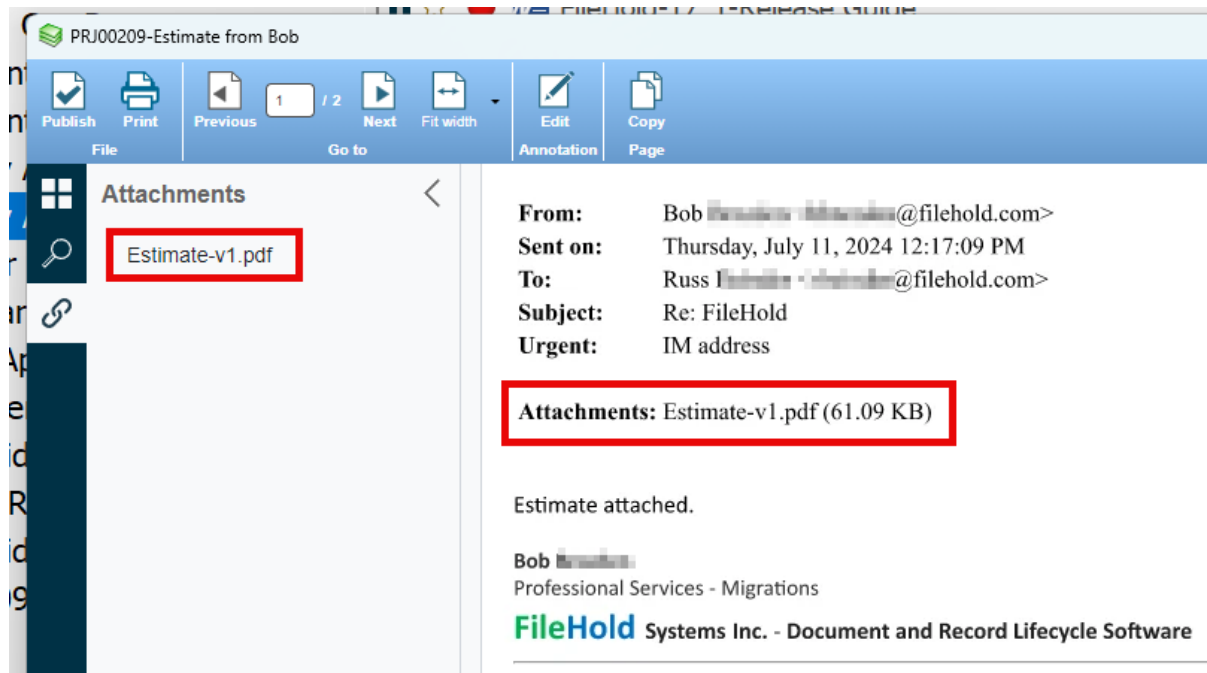
for an invoice if it was less than \$1000, a comment such as "approval not required for invoices less than \$1000" could be added to the overridden task.

## 7. FILEHOLD VIEWER ENHANCEMENTS

### 7.1. Embedded files are now supported

When viewing a document (such as an email) that includes embedded files, a new pane is enabled allowing you to view any of the attached files directly when the viewer is able and licensed to view the format of the file.

For example, a PDF file attached to an email can easily be viewed without first bursting it out of the email as a separate document.



### 7.2. Miscellaneous viewer improvements

- The viewer performance has been improved by reducing the time required to display pages. The first view since system start up or recycle has been reduced by 50% and the post start up view time has been reduced by 30%. Fewer documents are cached as PDF files now and more control is available over when documents are cached using the managed option [Viewer.ExtensionsToExcludeFromHighFidelityConversion](#).
- Annotations now appear consistently for all viewer levels when the document is first opened. Level 2 and higher viewers can enable annotation editing as needed. Where needed, the prior behavior can be enabled with the managed option [Viewer.Pre171MarkupBehavior](#).

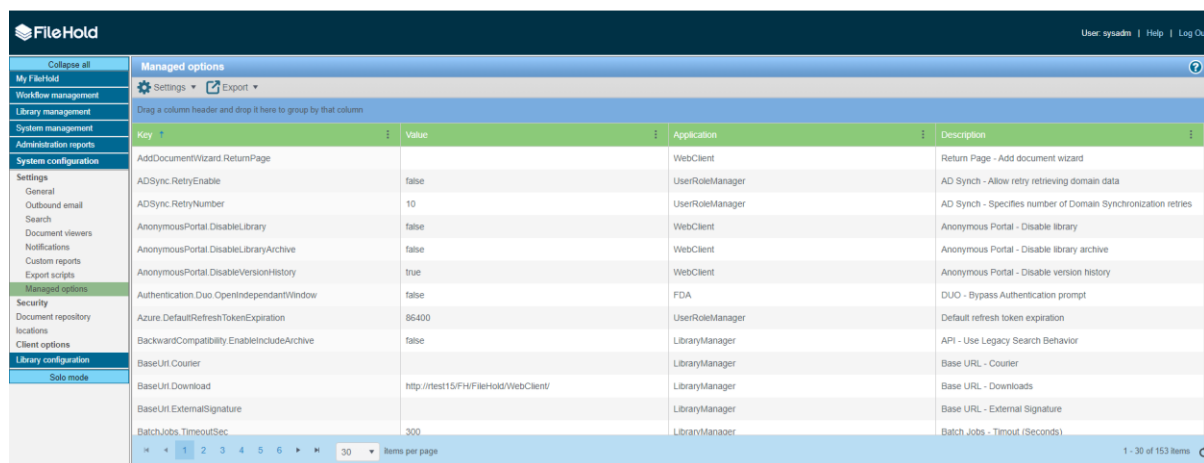


- Annotations provide detailed system information when the user hovers over them. New managed options `Viewer.EnableLimitedUserAnnotationInformation` and `Viewer.EnablePortalAliasUserAnnotationInformation` are available to allow this information to be suppressed for limited and portal alias users.
- The thumbnail panel width now defaults to one thumbnail width when opened, or the user's last width settings.
- For new installations, all FileHold Viewer options for all viewer levels are enabled by default. These settings are configured in the web administration menu under **System Configuration > Settings > Document Viewers**.
- New file formats are supported for level 2 and higher viewers: .azw3 (Amazon Kindle), .chm (Microsoft HTML help file), .md (lightweight mark-up), .epub (electronic publication), .xlt (Microsoft Excel template), .pot (portable object template).

## 8. MANAGED OPTIONS

A new option management feature has been added to the product. The **Managed options** feature is now available to make configuration changes that could only previously be performed by a Windows administrator by editing web config files. Most options from web config files have been moved, but some will remain in web config files.

Managed options includes built-in help for each option, edit and visibility permissions control, and the feature is extensible for supporting configuration needed for custom add-ons to FileHold.



Key	Value	Application	Description
AddDocumentWizard.ReturnPage		WebClient	Return Page - Add document wizard
ADSync.RetryEnable	false	UserRoleManager	AD Sync - Allow retry retrieving domain data
ADSync.RetryNumber	10	UserRoleManager	AD Sync - Specifies number of Domain Synchronization retries
AnonymousPortal.DisableLibrary	false	WebClient	Anonymous Portal - Disable library
AnonymousPortal.DisableLibraryArchive	false	WebClient	Anonymous Portal - Disable library archive
AnonymousPortal.DisableVersionHistory	true	WebClient	Anonymous Portal - Disable version history
Authentication.Duo.OpenIndependentWindow	false	FDA	DUO - Bypass Authentication prompt
Azure.DefaultRefreshTokenExpiration	86400	UserRoleManager	Default refresh token expiration
BackwardCompatibility.EnableIncludeArchive	false	LibraryManager	API - Use Legacy Search Behavior
BaseUri.Courier		LibraryManager	Base URL - Courier
BaseUri.Download	http://test15/FH/FileHold/WebClient/	LibraryManager	Base URL - Downloads
BaseUri.ExternalSignature		LibraryManager	Base URL - External Signature
BatchJobs.TimeoutSec	300	LibraryManager	Batch Jobs - Timeout (Seconds)

The Managed options menu is available to system administrators and support users. When support users are enabled, certain options will not be visible to system administrators.

For performance reasons, the options are cached. Any changes made will take effect on the next cache refresh. Users with non-production systems can directly recycle or restart the web server to immediately refresh the cache.

## 9. ENHANCED ADMINISTRATION OPERATIONS

### 9.1. User list improvements

Minor enhancements have been made to the User List ([Full Administration Menu > System Management > User Management > Users](#)).

- A double-click mouse action will now open the user properties page directly.
- By default, both enabled and disabled users are visible.

### 9.2. Document lifecycle processing

New options have been added to make this process more scalable.

- Independent types of processing including events/schema and permanent delete have been decoupled to minimize the chance of one type of processing affecting another.
- A managed option, [Lifecycle.Task.Batchsize](#) has been added to further breakdown processing to handle cases where very large numbers of documents are queued for processing on the same day. The default is 100 documents per batch.
- Another managed option, [Lifecycle.Task.ProcessingTimeLimit](#) is present to provide a maximum processing time across all batches of documents. The default is 1800 minutes.

Document lifecycle processing is a headless operation that provides little feedback. There is a new Administration report that can be viewed to determine the processing status. [Calculate expected volume](#) will update the report with the pending processing.

FileHold

User: sysadm | Help | Log Out

Collapse all

My FileHold

Workflow management

Library management

System management

Administration reports

User activity

Document usage log

Library audit log

System audit log

Insufficient sessions

Effective permissions

Search performance log

Courier usage log

Document lifecycle processing log

Batch jobs report

System configuration

Library configuration

Solo mode

Document lifecycle processing log

Calculate expected volume

Soft delete queue status

Last status	Last run	Last run duration	Last run volume	Expected volume	Last calculated
Success	7/11/2024 1:10:47 AM	00:00:00	0	0	7/11/2024 4:13:13 AM

Lifecycle task status

Action	Schema	Event	Last status	Last run	Last run duration	Last run volume	Expected volume	Last calculated
--------	--------	-------	-------------	----------	-------------------	-----------------	-----------------	-----------------

Settings

Batch size:	100
Batch processing time limit:	1800 minutes

### 9.3. Send email using Microsoft Graph on M365

Users connecting FileHold to Microsoft 365 email will now be able to do this directly and securely without using the SMTP protocol. This will allow these customers to improve their email security by disabling SMTP and basic authentication.

The change is accompanied by a new email configuration interface for all types of email. It has been moved to its own menu options under [System configuration > Settings](#).

The page now has a modern user interface, and the configuration is more intuitive. There are two tabs to the Outbound email settings: General for configuration, and Test to send test emails and log prior sent tests. The log also allows users to drill into error details. Optional messages can also be included for testing.

**FileHold** User: sysadm | Help | Log Out

**Outbound email settings**

Configuration | Test

**General**

Protocol: SMTP - No authentication, no encryption  
*Use for testing or internal communication. This is not a safe configuration for any email server on the internet.*

SMTP server address:

SMTP server port: ☐ Use custom port 25

Reply-to email address:

Use this reply address only for system generated emails: ☐

Save

---

**FileHold** User: sysadm | Help | Log Out

**Outbound email settings**

Configuration | **Test**

**Test email**

Test email address\*:

Optional message:

Send test message

**Latest test emails sent**

Time	User	Status	Subject	Body	Error details
No test emails were sent.					

## 9.4. Two-factor authentication options

The recommended method to implement two-factor authentication is to configure this as a part of an external identity provider rather than directly in FileHold.

For cases where this is not an option, a new license option is available to support simple two factor authentication using either an email verification or TOTP (Time-base One Time Password).

## 9.5. New FDA configuration options

- When configuring a silent installation, system variables can be included, such as %userprofile%\Documents\My FileHold Documents. This will allow for a more efficient deployment.
- The *FDA.exe.config* file can now be updated to control key TCP options for use in networks with troublesome gateways and routers:
  - Expect100Continue – default is false.
  - UseNagleAlgorithm – default is false.

For example,

```
<system.net>
  <settings>
    <servicePointManager expect100Continue="false"
    useNagleAlgorithm="false" />
  </settings>
</system.net>
```

## 9.6. Default working folder in the FDA

The default working folder for the FDA has been moved to avoid conflicts with recent changes to the default behavior of Microsoft OneDrive on the Windows Documents folder.

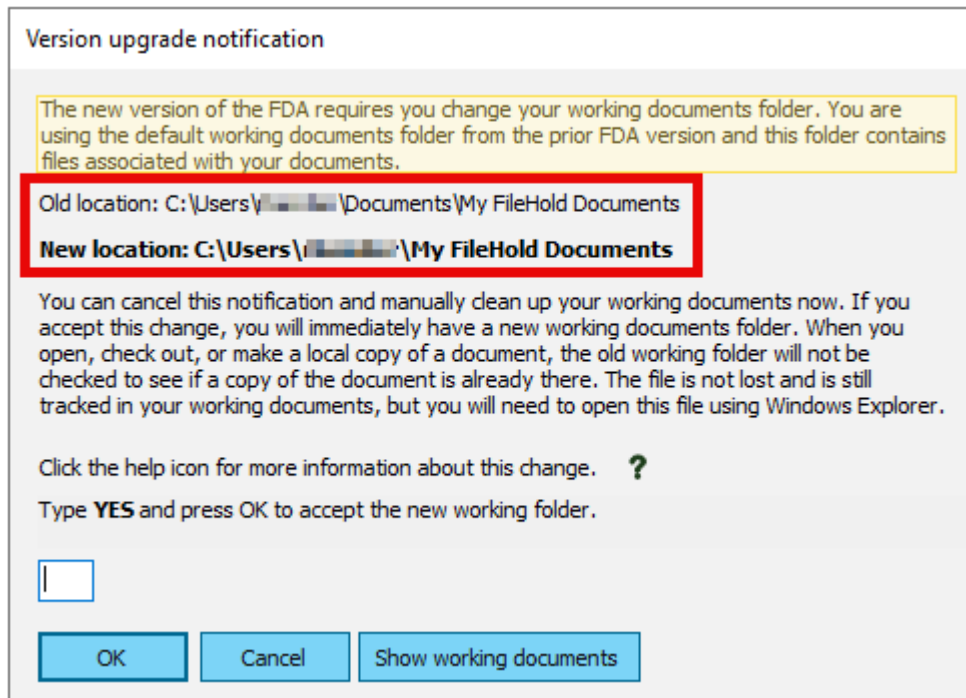
In prior versions, the default working folder was C:\Users\<username>\Documents\My FileHold Documents.

Starting with version 17.1, the default folder is C:\Users\<username>\My FileHold Documents.

When users have not changed their default working documents from the product default, they should synchronize their working documents before upgrading the FDA to 17.1 and ensure their working documents folder does not have any documents.

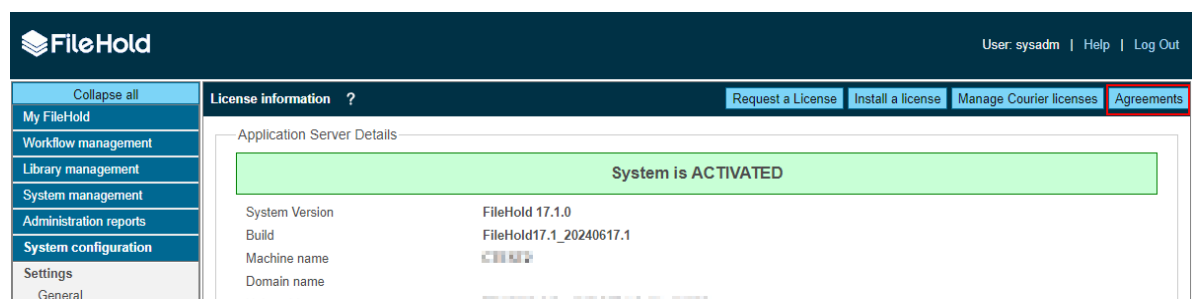
If users were using the product default folder and upgrade their FDA but they have not cleaned their working documents, they will be prompted before the change is made.

When start the FDA, FileHold will check if the working documents folder is the product default from the previous version and if it contains documents. If so, they will be given a warning that their working folder will be changed and that they should synchronize or clean up their working documents. They will need to type **YES** and click **OK** to proceed with the change when documents still exist in their old working folder. This should be a one-time action for typical users, if they see it at all.



## 9.7. License page changes

A new button has been added to the Administration menu, under [System Management > License > Information: Agreements](#) to allow system administrators to view the standard license agreements associated with FileHold.



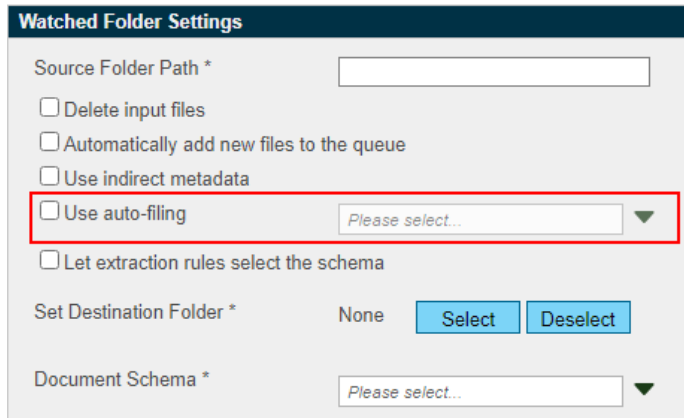
Selecting this button will allow open the FileHold website with access to the EULA, FileHold Terms and Conditions, and Third-party notices. This button is specific to the version of FileHold that is in use.

There are several minor changes to the license page:

- If your system is managed by a designated support organization, their name is provided.
- Various options have been consolidated including a new options and legacy section separate from the user licensing.
- License options now include product add-ons.

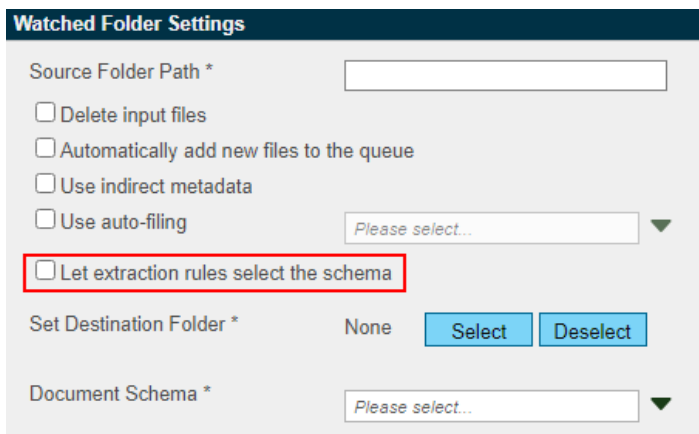
## 9.8. Improvements to extraction rules in ADI

Although auto-filing rules could always be applied when using ADI with indirect metadata, it was not available when using an extraction rule; Now ADI processes watched folders in a similar way to the FDA allowing the use of auto-filing as part of the Watched Folder Settings:



The screenshot shows the 'Watched Folder Settings' dialog box. It contains several options: 'Source Folder Path \*' (text input), 'Delete input files' (checkbox), 'Automatically add new files to the queue' (checkbox), 'Use indirect metadata' (checkbox), 'Use auto-filing' (checkbox) which is highlighted with a red rectangle and has a dropdown menu showing 'Please select...', 'Let extraction rules select the schema' (checkbox), 'Set Destination Folder \*' (None) with 'Select' and 'Deselect' buttons, and 'Document Schema \*' (dropdown menu showing 'Please select...').

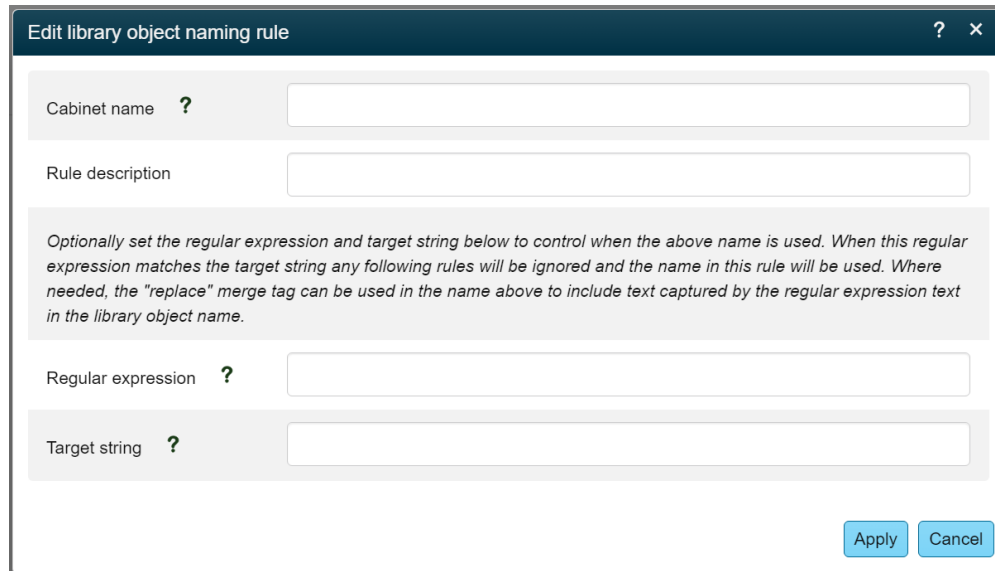
ADI has been extended to include an option that allows a document schema to be determined by extraction rules:



The screenshot shows the 'Watched Folder Settings' dialog box. It contains several options: 'Source Folder Path \*' (text input), 'Delete input files' (checkbox), 'Automatically add new files to the queue' (checkbox), 'Use indirect metadata' (checkbox), 'Use auto-filing' (checkbox) with a dropdown menu showing 'Please select...', 'Let extraction rules select the schema' (checkbox) which is highlighted with a red rectangle, 'Set Destination Folder \*' (None) with 'Select' and 'Deselect' buttons, and 'Document Schema \*' (dropdown menu showing 'Please select...').

## 9.9. Improved auto-filing template dialogue

The auto-filing template designer rule dialog has been updated to include more clear information about the various options with direct help associated with each option.



**Edit library object naming rule** ? x

Cabinet name ?

Rule description

Optionally set the regular expression and target string below to control when the above name is used. When this regular expression matches the target string any following rules will be ignored and the name in this rule will be used. Where needed, the "replace" merge tag can be used in the name above to include text captured by the regular expression text in the library object name.

Regular expression ?

Target string ?

Apply Cancel

## 9.10. FHIT Improvements

The FileHold Instrumentation Tool (FHIT) has several functional improvements:

- Additional checks for the FileHold service user validity are added to the Health checker.
- Machine name and installed version consistency checks are now made to better support server migration. Updates can be performed where needed.
- Added option to reset version tracking to compare the Windows version and machine name against the stored values in FileHold and provide options for updating if there are differences.
- Windows server minimum and maximum versions and required locale, US-English, are now validated in the pre-checker and health checker.
- FHIT and the health checker are now aware of custom application pools.

## 9.11. Quick health check option

A "healthz" endpoint has been added to FileHold. It provides a simplified health check that can be used by remote monitoring tools to confirm a simplified status of the library manager, document repository, full text search engine, and user role manager.

The endpoint uses the following URL format:

<protocol>://<server-name>/FH/FileHold/WC3/healthz.

For example, `https://dms.example.com/FH/FileHold/WC3/healthz`.

The endpoint can be disabled with the appSettings option [DisableHealthCheckEndpoint](#). By default, it is enabled.

The setting is in <application-server>\WC3\appSettings.json in the Startup object.

```
"Startup": {
  "DisableHeathCheckEndpoint": false
},
```

## 9.12. Custom data providers changes

Vendors often implement ODBC drives using methods that diverge from the standard. Several new managed options have been added to configure the custom data provider to suit a wide variety of ODBC data sources. You will generally need detailed technical knowledge of the ODBC driver to make changes to these values. All managed options are prefixed with [CustomDataProvider](#).

- [GetViewItemExcludedProvidersCommaDelimitedList](#) – Specify providers for which the “View” will not be retrieved.
- [OdbcCatalogNameIdentifierCollection](#) – A list of catalog name identifiers.
- [OdbcColumnNameIdentifierCollection](#) – A list of column name identifiers.
- [OdbcCustomParameterMarkerFormat](#) – Specify a parameter marker format.
- [OdbcLogDatabaseSchemaDescription](#) – Option to enable logging of the schema reported by the ODBC driver. This can be used for diagnosing issues associated with interacting with the ODBC driver.
- [OdbcSchemaNameIdentifierCollection](#) – A list of schema name identifiers.
- [OdbcTableNameIdentifierCollection](#) – A list of table name identifiers.
- [OdbcViewNameIdentifierCollection](#) – A list of view name identifiers.

## 9.13. Miscellaneous administrative changes

- FileHold now maintains a log of sent emails that can be used for diagnostic purposes by a Windows system administrator. The days the email log will kept will be controlled by a configuration option, [Email.Log.RetentionDays](#), which defaults to 30. Entries after this number of days are automatically deleted by a periodic clean up mechanism.
- The digital signature log that records transmission to Adobe Acrobat Sign or DocuSign is automatically truncated when records exceed the configured retention period stored in the managed option [DigitalSignature.Log.RetentionDays](#). The default is 180 days.
- Using a networked or OneDrive folder as a working documents folder or watched folder can have unreliable results. A new Managed option allows administrators to restrict access these folders, using the key [FDA.RestrictNonLocalFolders](#). This is enabled by default for new installs; upgrades will not exclude access to existing folders but will prevent changes. When enabled, user will see the warning “Your system administrator has restricted using network and OneDrive folders.”
- Rather than waiting for the default hourly synchronization of data in database managed dropdown menus, an administrator can cause the synchronization to occur on demand from the metadata field configuration screen. This also changes what happens when a new field is created, or an existing field is updated as automatic immediate synchronization will no longer happen and it will be up to the user to determine whether a synchronization is



required immediately.

Product Development / Dev

Edit cd Customer name Field

General Field Properties Preview

**General Settings**

Name \* cd Customer name

Description

Field Type \* Drop Down Menu - Database Lookup

Synchronize now

#### 9.14. More control and containment for support users

Support users provide a distinction between technology administrators and system administrators. Specifically, when enabled, they reduce the functions a normal system administrator can perform specifically removing tasks not related to the normal functioning of the FileHold system. They have been a feature of FileHold for several versions and now there are some new controls.

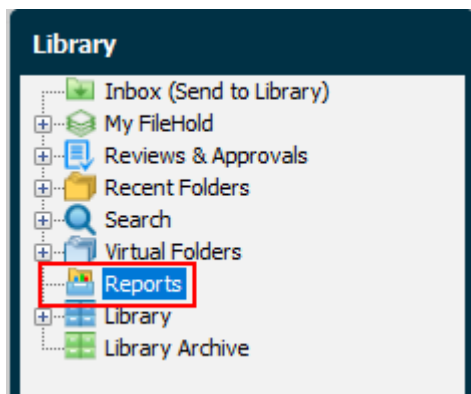
- Support users typically have no reason to have access to the contents of documents. They are now unable to download, view, print, or email documents. This is not intended as a total prohibition as a support user often has infrastructure access to raw data in the system. It does, however, discourage casual access and opens separation-of-concerns options.
- Certain notification emails will not be sent to support users including FTS errors, insufficient CALs, and exceeded login attempts. Although the notifications are not sent, the information remains available to support users.
- The license page will now indicate whether support users have been enabled in the system and signal that normal system administrators will have reduced access. Where support users are enabled by license instead of configuration, the domain of the support users will be displayed. Currently the only possible domain is "filehold.com".
- When support users are enabled in the license, any logged activities by a support user will be reported under an umbrella name. For example, "FileCare Team". The detailed logging will still include specific details identifying the actual support user who logged in, however.
- When support users are enabled, the "Terms and Conditions HTML" field on the login tailoring page can only be modified by a support user.

## 10. SIMPLE REPORT VIEWER

A new type of report is now supported as a part of the standard FileHold clients: the Simple Report Viewer. Unlike SSRS reports, a minimal configuration is all that is necessary to create a report. A report is simply some SQL code that returns a column containing HTML text that constitutes the report. The viewer executes the SQL code and displays the resulting HTML page. Simple report viewer and SSRS reports can coexist.

A managed option is available to provide the necessary security overrides for any external Javascript, fonts, or CSS that is used in the custom reports: [SimpleReports.TrustedSource](#).

Several example reports are included with FileHold and the **Reports** node is now enabled in the Library tree when FileHold is installed.



**Reports** opens a list of reports for users that have been given permission to see them. By default, library administrators through system administrators have access to all reports including the provided examples.

A screenshot of the 'Simple reports' interface. It features a table with four columns: 'Report Name', 'Created By', 'Created On', and 'Report Description'. There are four rows of example reports, each preceded by a red circular icon. The table is titled 'Simple reports' and has a 'Show report' link above it.

Report Name	Created By	Created On	Report Description
Example 1 - Document access by month		6/17/2024 4:42 PM	Document access frequency by month year to date
Example 2 - Documents never accessed		6/17/2024 4:42 PM	Documents never accessed by year
Example 3 - Dashboard		6/17/2024 4:42 PM	Clusters of downloaded, deleted, and checked out documen...
Example 4 - Dashboard		6/17/2024 4:42 PM	Document activity and workflow summary

Permissions to these reports configured in the Web Administration menu, under **System Configuration > Settings > Custom reports** as for all custom reports.

FileHold						User: sysadm   Help   Log Out
Collapse all						
My FileHold						
Workflow management						
Library management						
System management						
Administration reports						
System configuration						
Settings						
General						
Outbound email						
Search						
Document viewers						
Notifications						
Custom reports						
Export scripts						
Managed options						

Simple reports and Reporting Services authorization ?					
Name	Type	Server path	Description	Created on	
Example 1 - Document access by month	Simple report		Document access frequency by month year to date	6/17/2024 4:42:44 PM	<a href="#">Security</a>
Example 2 - Documents never accessed	Simple report		Documents never accessed by year	6/17/2024 4:42:44 PM	<a href="#">Security</a>
Example 3 - Dashboard	Simple report		Clusters of downloaded, deleted, and checked out documents in last 30 days	6/17/2024 4:42:44 PM	<a href="#">Security</a>
Example 4 - Dashboard	Simple report		Document activity and workflow summary	6/17/2024 4:42:44 PM	<a href="#">Security</a>

Self-hosted customers can create and install these reports themselves using provided SQL Stored Procedures. FileHold Cloud and self-hosted customers can work with the FileHold professional services team to design and deploy custom reports for them.

## 11. EXPANDED MERGE TAG FUNCTIONS

Several new merge tag functions have been added. Many can act on values from more than one documents or where there are multiple values for a single document. They can also be combined in a single merge tag using the Wrap function.

- Distinct - Return a list of values after removing duplicates.
- Sum - add a list of values outputting the sum.
- Average - return the average of many values.
- Property - Return the internal properties of metadata fields, such as drop-down menus.
- Take - return one or more values from a list of values starting from a specific value.
- Trim - remove leading and trailing spaces from a value.
- Last - returns one or more values from a list of values, like Take, but in reverse.
- Wrap - execute multiple functions as though they were one.
- Right - return a specific number of characters from a value starting from the end of the value.
- Substring - return a specific number of characters from a value starting from a specific character in the value.
- Min - return the smallest value from a list of values.
- Length - returns the number of characters in a value.
- Max - return the largest value in a list of values.
- Skip - return a sub-list of values starting from a specific value in a list of values.
- Uppercase - convert the value to use upper case alphabetic characters.

- Lowercase - convert the value to use lower case alphabetic characters.
- Reverse - output a list of values in reverse order.
- OrderBy - sort a list of values.

## 12. MISCELLANEOUS ENHANCEMENTS

### 12.1. Performance improvements

- Customers that are experiencing deadlocks related to the snapshot table may benefit from disabling real-time snapshot removal. Snapshots are created each time a user performs a search, browses a folder, etc. and these snapshots are removed shortly after they are used by default. There are three new managed options to control this behaviour: [Snapshot.EnableRealtimeDeletion](#), [Snapshot.MaximumRecordsToGarbageCollect](#), and [Snapshot.RetentionHours](#).
- Several optimizations have been made to the full web client including removing subtree loading until requested by the user, changing the method used to load saved searches, drawer, folders and folder groups, and workflow templates. Changes were also made to the calculation of folder permissions and reinitialization of the membership panel is avoided unless needed.
- Significant performance improvements have been made for the cases where a single user is assigned to multiple groups.

### 12.2. Feature changes

- The default chunk size for transferring files has been reduced from 500 MB to 60 MB.
- The add/update error dialog now has a [Details](#) button.
- FileHold-generated URLs pointing to documents can optionally include the document name for clarity for anyone viewing the raw URL. This feature is controlled by a managed option [Library.AddNameToDocumentUrl](#) and by default it is disabled. In the resulting URL, all text after the “name” parameter is ignored and must follow normal rules for encoding URLs.
- The default value for new date metadata fields is now blank instead of **Current date and time**.
- Organizations can now change the default field separator characters for custom naming from an underscore to a value configured in the managed option [DocumentSchema.CustomNamingDefaultConstant](#).
- FileHold now includes the system name in the title bar, and on the splash screen when logging into the FDA. System administrators and support users will additionally see the server URL as in prior versions.
- The dialog announcing new web client features following upgrades has been removed as it is assumed all, or most customers have upgraded from a version earlier than 14.2 prior to this latest release. Customers who are upgrading from a version earlier than 14.2 should ensure their users are familiar with the changes to the full web client interface to more closely match the FDA user interface.

- A new managed option key, `ErrorDetails.SuppressStackTrace`, has been added to remove stack trace information from the `Details` button on error messages. The stack trace is still included in the server event log.
- The API toolkit has been removed from the install package. It can now be accessed at <https://api.filehold.com/>, along with prior versions of the API documentation for reference. See the API Changes document in the Api Kit for information about other changes including methods to update a user's authentication type, synchronize individual dropdown menu fields, and update the default view for a limited or portal alias user.
- Webview2 has now replaced EO.Browser as the integrated web browser in the FDA. This new technology is automatically updated by Windows Update to improve the security of this control. Users may notice subtle differences in the look of the embedded HTML pages.
- Various security and technologies updates have been incorporated to ensure the minimal third-party technology footprint and use of the latest recommended coding methods from Microsoft and OWASP.
- Additional functions in the application server have been given the "long timeout" designation to ensure they can complete normally.
- The mechanism for opening a new email in Outlook from the FDA has changed. When Microsoft Office Outlook is installed and the user presses the email toolbar icon after selecting one or more documents, an email will be opened in Outlook with the documents as attachments or links according to user option and administrative configuration. Previously, this had applied a generic email signature to the body of the email as there is no method to force Outlook to use the default Outlook signature. With the new mechanism, there is a greater likelihood that the default Outlook signature will appear. For cases where the default Outlook signature is not available, the generic signature can be enabled using the managed option `FDA.UseGenericSignature`.

## 13.RESOLVED ISSUES

ID	Title
22763	(Viewer) Level 1 license does not correctly format Word document with Arabic text.
24755	(FullTextSearch) Indexing an encrypted stops the application pool in a specific case.
24823	There is a very brief CPU utilization every minute.
24889	The warning notification about free space in document repository is not sent if there is no warning threshold configured.
24912	Unable to remove supporting document from postponed workflow.
24923	(Viewer) Unable to check PDF form checkbox fields.
24938	(OCR) Unnecessary error "no pending file with the token 00000000-0000-0000-0000-000000000000" cluttering event log.
26226	(FDA) Windows DPI scaling (250%) causes document view lines to overlap.
26229	Microsoft Word custom properties are updated even when they do not contain merge tags when EnableOfficeCustomPropertyUpdates is true.
26287	(FDA) 'Exporting Grids to CSV' does not export the actual value of the 'URL' metadata field in the CSV when the 'Caption' option is used in the metadata field configuration.
26288	Unable to add a single document to two or more workflows as a supporting document.
26296	"Restore system default settings" in the Manage Users list does not clear all existing column sorts in the page.
26309	File extension does not get removed from the FileExtensions table even if the last document version is permanently deleted.
26439	Some variations on first name and surname in the callback from an external identity provider are not handled.
26446	An exception is thrown upon pressing 'Save & Next' in the metadata & file properties of a document in the Inbox list with the 'Auto-Send document after completing metadata' option enabled.
26481	Unable to delete an active directory domain in the FHIT tool.
26485	(FDA) Working Documents tool does not remove duplicate or older files during the synchronization process.
26573	User defined events execute any installed plug-in each time event processing runs.
26584	(Viewer) Issues with rendering XLSX documents in header/footer.
26595	Unexpected error occurs when attempting to edit any user account in the system with the last local 'sysadm' account disabled.
26676	(FDA) Working Documents tool deletes newer file during the synchronization process.
26678	Merge tags for system environment and users values are not supported everywhere merge tags can be used.
26680	(Viewer) When the viewer is running in UI lock mode, there is a return page error upon clicking on the Close X button with the "Viewer_ReturnPage" set to empty.
26735	(Courier) Daily email notification(s) for the recipient user who has not completed their task should cease after suspending a transmission.
26763	System remembers previous membership of a user to any folder(s) in a cabinet after removing user's membership from the cabinet.
26772	System does not handle the date/time range correctly when filtering out the search results in the User Activity Log report.
26774	(FDA) Metadata fields are not cleared during check-in using the working documents panel.
26792	System should automatically drop the extra decimal places when using the 'Document Version' in the custom-naming of a schema.
26793	(FOC) Confusing message which prompts the user upon double-clicking on a file to 'get a copy and open file'.
26829	Unexpected error occurred upon submitting approval/review of a workflow associated with a value supplied in the 'Open password' field in the 'Convert main documents to PDF' option.
27090	Active directory synchronization can create duplicate users when a user is deleted in the domain then added back to the same domain.

27097	(FullTextSearch) Deprecated metadata only feature persists in saved searches created prior to deprecation.
27098	Unexpected error occurred when user tries to perform filtering on one of the 'Manage users' columns of the User Management > Users.
27104	(Viewer) The warning about not running JavaScript content cannot be suppressed.
27235	(FHIT) When configuring the 'Default local working folder' when creating an FDA installation template file, it is not possible to use Windows system variables.
27246	(FDA) Unable to open folder properties when the folder is associated with a folder group that has been deleted.
27271	(FDA) Failed to auto-file to an auto-tagged folder using a watched folder.
27276	(Viewer) Specific docx file failed to open in the level 1 license viewer.
27311	(C2PDF) Only the final PDF and the version last checked-in by a user should be approved.
27340	Document was 'automatically deleted' from the workflow by the OCR process if the 'OcrRemoveOriginalDocuments' configuration was set to true.
27341	OCR log entries for deleted document versions still appear in the OCR log.
27342	OCR errors/warnings remain or 'do not clear' after successfully re-adding a document to the queue.
27349	(Installer) Scheduled tasks are not created if the password of the service account includes " (double-quotes).
27359	(APIKit) 'FileNotFoundException' thrown when trying to run the APIDemo.exe in the command line.
27364	(FDA) OneDrive Word docs not removed from Working Documents by FOC after viewing.
27371	(FDA) Shared inbox not available in specific permission scenarios.
27385	(Client options) Reset default value button for 'Remain logged in even if no activity is performed' option warning message always says 'enabled'.
27399	(WebClient) User names cannot be the same as the user's email address.
27502	Timeout value too short for ch_ChangeDocumentSchema.
27596	Unlicensed plug-ins fail silently.
27663	Date metadata field default value is not 'blank' as for other metadata fields.
27666	(Auto-filing) Alpha letter case is not handled correctly for folder groups.
27671	(FDA) 'Search' button is disabled when including the 'Owned By Me' filter in an empty saved search.
27673	Wrong value in the 'Linked' column of a document whose linked file was deleted.
27758	There is no option to retry domain synchronization. New configuration key "ADSync.RetryEnable" was added.
27836	Using the 'Drop Down Menu - Database Lookup' metadata field configuration screen deletes choices that exceed 500 values.
27899	(Viewer) Cannot open documents with the file extensions .md and .mobi.
27906	'Publishing file as a new local document' should be logged as a 'Downloaded' action in the Document Usage Log.
27924	(P2F) There is no warning when a user installs Print to FileHold, but they do not have a license to use it.
27925	(FDA) Unable to 'drag and drop' an offline document from the Inbox to the library panel.
27928	[Sierra Wireless] (WebClient) Failed to generate an entry in the 'Failed login' section of the FH server's event viewer log when a 'non-existent' user account attempts to logon to the system
27933	(FDA) Not printable characters are not escaped when captured by FastFind to launch a search
27934	(Assemble) Cannot 'check-in as new version' any one of the merged documents that are being assembled.
27953	(FTS) The raw query search type inserts an AND connector when it appears in multiple search criteria.
27961	The search by URL feature does not support the file only, metadata only, and raw search cases.
28041	(Courier) Reminders continue for users that did not complete their actions even when the transmission is complete.
28077	(C2PDF) Character and paragraph formatting were modified after conversion of main document to PDF upon workflow approval.
28088	(Workflow) Task instruction format codes are not correctly formatted in email notifications.

28091	(MobileWebClient) Unexpected error occurred when attempting to download a document from a workflow email notification using the Mobile link in the notification.
28374	(Viewer) Hints are not working for mentions in comments.
28491	Systems that convert from active directory authentication to external identity provider authentication and do not disable domain authentication still allow users to authenticate against the domain without regard to any policies set in the external identity provider.
28526	(Workflow) The 'Allow Approval Postponed' checkbox of any Approval activity of a workflow template was rendered unchecked upon removing an activity in a specific scenario.
28530	Custom "number of days" filter for the Batch jobs report is failing in some cases.
28710	(FDA) Reauthentication cannot be forced with external identity provider when there is an existing browser session.
28762	(ADI) Document names containing control characters in an indirect metadata file can be imported successfully leaving the control characters and causing downstream issues as the documents are used.
28764	Upgrading from a FileHold version does not correctly reconfigure saved searches that uses the old metadata only option causing non-deterministic behavior in search results.
28808	(OCR) There is an error when PdfCompression.Images enabled.
28816	(OCR) Processing will fail if the document metadata is modified after the document is queued but before the OCR process has completed.
30615	(FDA) Customers with large datasets may experience a temporary black screen the first time they right-click a document list header column.
30624	(Installer) The pre-checker does not display an error when the WebSocket Protocol option is not enabled.
30628	(Installer) Customers where their first installation was with version 15.1 or lower get an installation error related to the ShadowTaskQueue.
30632	(FDA) Editing a FileHold managed dropdown menu would cause values to be deleted where the number of menu options exceeded the value of the managed option Dropdown.ItemCountPerRequest or the internal default of 100.
30632	(FDA) Font size is enlarged when renaming a document inline.
30637	(Installer) The values of all "BaseUrl" managed option keys are not populated from legacy web config files.
30640	Some client size managed options had no effect for users with a role below system administrator.
30644	(Search) Unable to index certain PDF files.
30645	(FDA) Search "Date no older than" or "Date at least" text is unreadable.
30661	Unexpected error mass editing more than 5 documents at time.
30682	(FDA) Wrong scaling of UI controls when changing Windows scaling options.
30688	Documents deleted from the archive do not appear in the recovery screen.
30689	(Viewer) Unable to display documents containing HTML on certain systems following an update to Google Chrome.
30793	(FDA) Unexpected error when attempting to open a file in the discontinued Brava viewer.
30779	(FDA) For high resolution display at recommended scaling, file menu text too large and simple search icons too small.

## 14. KNOWN ISSUES

ID	Title
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).
12056	(ADI) Unable to import a document version using 'ExternalId' for adiVersionKeytype when the adiVersionKey is a dropdown menu field.



12866	(Print2FileHold) Watermarks cannot be saved using the Print to FileHold printing preferences.
13556	(Viewer) If a workstation hibernates while viewing a document, the document will not be available for viewing after returning from hibernation. The document should be reopened in the viewer.
22777	(Viewer) Comments for a prior version of a document cannot be viewed in a newer version of the document.
24299	Document schema lookup will not function for cases with custom queries where parameter values are passed from a dropdown menu field with multiple values.
24922	(Viewer) Documents published from a PDF form with a multi-section field with multiple values selected, will lose some of the selected values.
27610	Open search results that select RSS output do not correctly escape characters that are not valid for RSS content.
27017	Warning banner configuration does not accept a relative URL for warning content. Use an absolute URL instead.
28377	(Viewer) Incorrect formatting for specific XLSX content.
28494	Workflow participants cannot view prior document version content even when the content was created in the same workflow as the current version when version hiding is enabled.
28719	(FDA) The filter dropdown is not visible when the size of the batch jobs panel is too small.
28746	(Viewer) Level 2 and 3 viewers are unable to open DOTM files.
28763	(FDA) Manage imports cannot configured a specific folder as a destination when that folder has auto-tagging enabled.
28781	Active directory domain synchronization is not able to automatically switch a user's domain when the user has the same GUID in the old and new domain. This does not affect scenarios when a user is deleted from one domain and added to a new domain as they are given a new GUID in the new domain.
28817	(OCR) No entry is added to OCR log when an exception occurs checking in a new document version.
28827	"Has Markups" section of the version properties panel is not refreshed after a markup is deleted.
30191	(Teams) Unexpected error when attempt to get the latest version of a document that is open from Teams.
30348	Insufficient sessions log contains repeated entries when Capture is unable to acquire a session license.
30613	The document link emailed from version history is incorrect for all but the current version.
30635	User can get an unexpected error when quickly double-clicking OK in the FileHold group properties screen.
30662	Compression percentage in document usage log uses wrong calculation.
30702	The managed option <code>Ocr.ExcludeExtension</code> incorrectly impacts compression.
30720	(FDA) Unexpected exception when a metadata field that exists in user views is deleted from the system.
30722	(Workflow) The status report may not show completed workflows when started from the workflow dashboard screen link.
30726	(WebClient) SearchManager.aspx returns results with large file format icons.
30735	The search results that appear when deleting a schema do not include documents in the archive.
30831	(Workflow) User is able to create a one time review for a user who does not have permission to a document in the workflow.
30868	(FDA) The filter in the batch jobs panel does not show the latest jobs.
30909	(FDA) An invalid URL will be accepted by the connection dialog in certain scenarios.
30910	Folder notifications are sent to users with effective permissions to a document instead of members.
30911	Instructions to new users are missing from the activation email if the activation email is resent.
30915	(ApiKit) Export script demo project fails with a serialization error.