



FileHold

RELEASE GUIDE
VERSION 17.2

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For further information about this manual or other FileHold Systems products, contact us at 112-970 Burrard Street Office# 1312 Vancouver, BC V6Z 2R4 Canada, via email sales@filehold.com, our website <http://www.filehold.com>, or call +1 (866) 345-3465.

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1. FILEHOLD 17.2 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 17.2.

2. SYSTEM REQUIREMENT CHANGES FOR FILEHOLD 17.2

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 SQL Server 2014

2.2. Newly supported platforms

Customers can now deploy FileHold in the following new locations.

- Microsoft Windows Server 2025
- Microsoft Office 2024 (FileHold Office Client)
- Microsoft Outlook on the web and Outlook desktop (new look)

2.3. Deprecated platforms

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

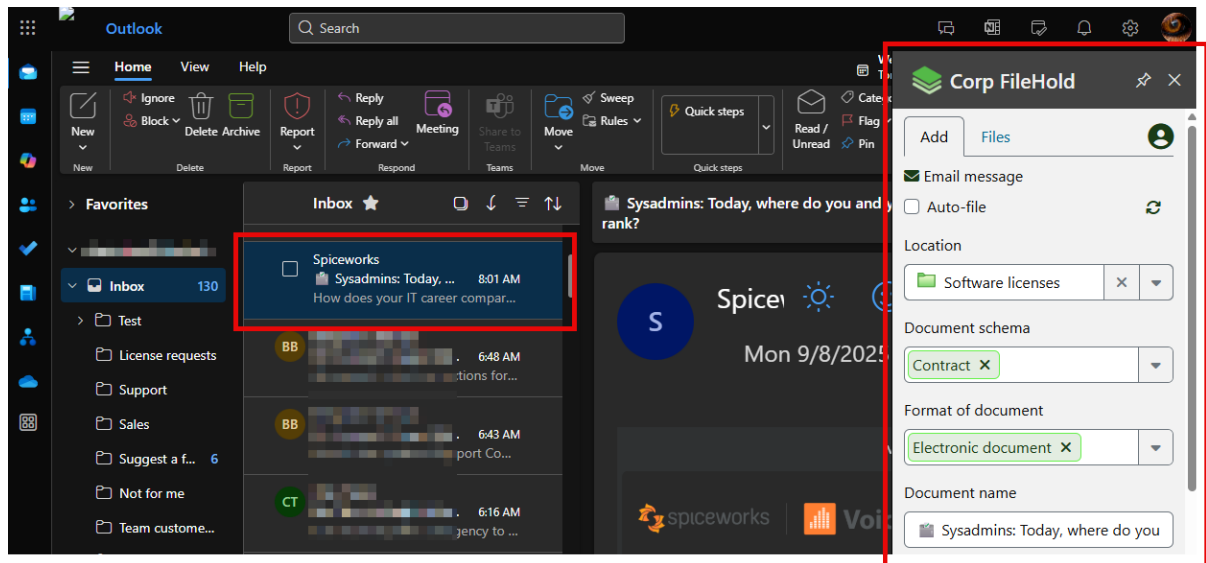
- Adobe Acrobat Sign

3. MICROSOFT OUTLOOK ADD-IN CLIENT

Prior versions of FileHold have offered an integration with Microsoft Outlook through the FileHold Office Client (FOC). This new integration is the only option suitable for use with the new Outlook desktop application or web Outlook.

This new feature enables users with these clients to add email messages or attachments to FileHold. The workflow has been simplified from the existing client as email messages no longer need to be opened before being added. The add-in panel has further streamlined folder selection and auto-filing. Users can recall prior metadata values when adding multiple messages or files

that require the same information. This new client will optionally track added emails and prevent them from being added twice by the same user.



3.1. Requirements for the new add-in client

Unlike the existing integration option, FOC, this new integration does not require the FileHold Desktop Application to be installed on the workstation. Your email server must be Microsoft Exchange 2016 or later or online Exchange. If you will be using the classic or new Outlook desktop client on Windows, you will need Microsoft Edge browser installed. It does not need to be the default browser, but the Outlook desktop client uses the WebView component of Edge to present the add-in panel.

On an Apple Mac, Google Chrome is needed for using the web version of Outlook with the add-in. The desktop Outlook client for the Mac is now supported.

4. USER INTERFACE ENHANCEMENTS

4.1. FileHold ID context options

The FileHold ID appears in the version properties panel, and up until now it has been a display only field. A context menu is now available that will allow the user to right-click to see options for working with the ID.

All users will have the option to copy the document ID portion of the field or the complete FileHold ID to the clipboard.

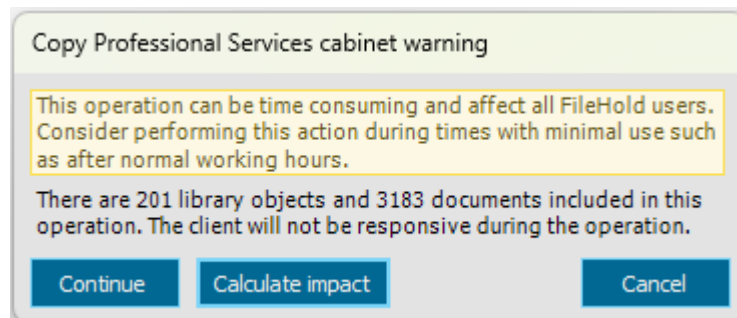
System administrators or, when enabled, support users, will have the additional option to copy all details. In this case the details will include the document version ID, metadata version ID,

repository path, repository location name, and the external system ID. Each line has its name and value separated with a tab character. These values are typically used for diagnostic purposes.

```
Document version ID: 224264
Metadata version ID: 239833
Repository path:      000\174\790.eml
Repository location name:  Default repository
External system ID:
  24313306f70084d79ec175f82c36d5c481557c33176ff3952d7f805d72f5e6fa
```

4.2. Copy and clone library object warning

Copying or cloning library objects (cabinet, drawer, folder group, or folder) can be time consuming depending on the contents of the source library object. Users authorized to make copies or clones will now get a warning message before the operation begins. [Calculate impact](#) will allow users to make a quick determination of the scope of the operation.



The number of documents will only be shown in the case of the copy operation.

4.3. Improved use of email signatures with classic Outlook desktop

When the classic Outlook desktop is installed on a workstation, and the user selects the send email option in the desktop client, the selected documents will be attached as files or links in a newly opened Outlook message. The method for opening this message has been updated to optionally use the default signature defined in Outlook.

This behaviour is controlled with the managed option [FDA.UseGenericSignature](#). The default value is false for new and upgraded systems. A system administrator or support user can modify this value. When the value is true, the FDA will generate the signature using the contact details stored in FileHold for the user.

4.4. Tooltips for permission icons

Document lists in FileHold include a permission icon to give users information about what operations will be possible on a document. This icon now includes a tooltip with information to remind the user of the meaning of the icon. In the FDA or web client, hover the cursor over the icon to see the text.

Icon	Tooltip
	Full access
	Read and edit
	Read-only
	Record
	Hidden until approved
	Latest approved
	Archived

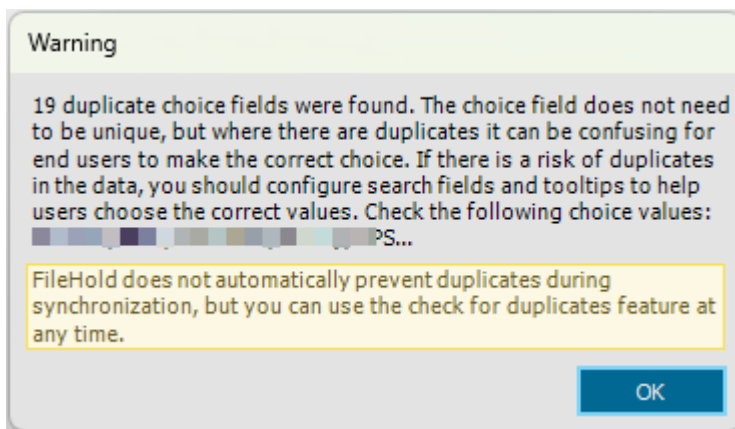
4.5. Dropdown menu item management changes

Prior versions of FileHold had a checkbox in the dropdown menu configuration dialog labeled “Remove duplicates.” The behavior of this feature could be non-deterministic as there was no way to specify which instance of a duplicate value the system should remove.

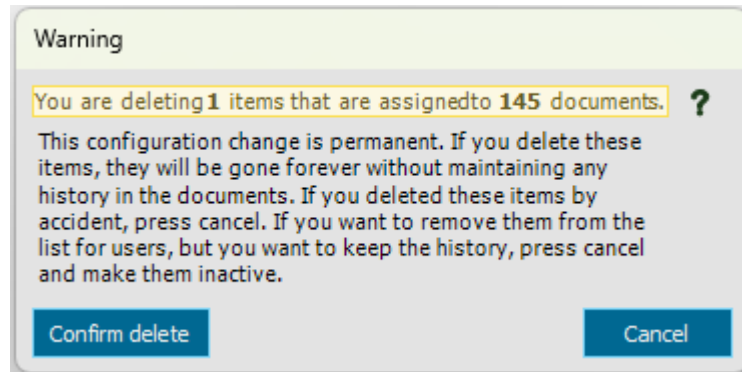
For FileHold managed dropdown menus, **Remove duplicates** will delete or make inactive any values that are duplicated. When two or more values are the same, they will be deleted in the following order: items just added and not saved, then items previously saved but with no associated documents, finally items with associated documents will be marked inactive.

The behavior is different for database dropdown menus. **Check for duplicates** will analyse the source ID and the choice fields independently. Source ID values should never be duplicated and duplicated choice fields can be confusing. The user will receive a warning in both cases, and they will need to adjust the field configuration or the source data to solve the issue. The user can press **Check for duplicates** as needed to verify they have resolved any issues.

The warning message will provide a count of the duplicates found along with a list of the first several values.



Finally, a new warning message has been added when deleting dropdown menu values in a FileHold managed dropdown menu field. The system will check for situations where the value is assigned to one or more documents and present the following warning.



4.6. Folder, metadata, and schema IDs

The folder, metadata, and document schema property dialogs have been updated to include the internal ID value for each object. This value will be next to the label "Internal ID". This value can be used for both diagnostics and configuring extensions like the extender plug-ins.

5. ADMINISTRATIVE USER ENHANCEMENTS

5.1. Export script configuration

Export scripts are now able to specify they will accept multi-line input values, and the user interface will accommodate these values with a scrollable field. Also, there is no longer any character restrictions on the content of a text field. This will allow entry of content such as XML.

5.2. Courier transmission expiry and cancellation notification control

Administrators can now control notifications associated with transmission expiry and cancellation. These global settings are available as managed options. By default, both options are false.

- `Courier.DisableExpiryNotification`
- `Courier.DisableCancellationNotification`

5.3. Notification changes

- ADI jobs can now send emails when errors and optionally warnings are found during import. The job properties now include an optional email address.
- When a system has hosting enabled, license notifications will only go to support users.
- Support users will no longer be available as an option as recipients when using the FileHold email client.

- Support users will no longer receive event notifications.

5.4. Full text index recompress support

FileHold Instrumentation Tools (FHIT) have been updated to support the dtSearch compress option. When an index has become fragmented, compress is a faster method to clean up the index instead of a rebuild.

5.5. Search performance log clean up

The search performance log is an optional feature, but it is commonly enabled to help customers track how users are performing searches. There is now a managed option to determine how long to maintain log entries. [SearchPerformance.Log.RetentionDays](#) is set to 30 by default. Additionally, by default the search performance log is enabled.

6. TECHNOLOGY ENHANCEMENTS

- Active Directory synchronization now allows for multiple OUs for a single domain.
- LDAPS is now supported for active directory synchronization.
- Copying and cloning library structure has received a performance improvement of approximately 30%. Note that this improvement can be affected by large files in the repository when using the copy operation.
- Changes to the DocuSign API related to the embedded views are supported. See <https://www.docusign.com/blog/developers/esignature-embedded-views-update> for details.
- The pre-checker now indicates an error when active anti-malware software is detected on a system. This is present to help customers avoid failed installations and upgrades when aggressive anti-malware software blocks elements of the installation. Note that not all anti-malware can be detected.
- The example program Batch Metadata Updater (BMU) has been enhanced to allow the use of domain password and external authentication. The command line has also been made more consistent. This program is part of the API kit and includes full source code.
- A webhook is now available for notifications about license changes. This allows client applications to modify their behavior immediately upon the installation of a new license file.
- A new client type, “InForm”, has been added for tracking logins from InForm.
- The Print to FileHold driver now uses new driver technology that does not require the “Do Not Use” printer to be installed.

7. RESOLVED ISSUES

ID	Title
12056	(ADI) Failed to import a version record with a dropdown menu metadata field value as the adiVersionKey for an 'ExternalId' adiVersionKeyType
27610	Search result(s) from opensearch are not properly encoded for RSS output
27644	(Viewer) Comma should be allowed as separator when trying to print multiple pages of a document at a time in the FileHold viewer
28377	(Viewer) /Formatting issues in specific .xlsx file
28466	Data being passed for 'not visible' metadata field(s) in custom SQL db schema lookups works differently between FDA and the WebClient
28781	(Domain synchronization) Error during synchronization occurs when a FileHold user is moved from one Active Directory domain to another
28821	Managed options filter persists across different user logins
28822	WarningBanner.UrlToShow does not accept relative URLs
30327	(FDA) It is not possible to reselect a dropdown menu value that has been removed with an "X"
30347	(FDA) Metadata field name with & (ampersand) in it is filtered out as viewed in the Metadata & File Properties panel and in Add/Remove columns list
30584	Verification of database connection string should not include verification of custom SQL Query when setting db lookup for a schema
30592	An unexpected error occurs when trying to approve a workflow associated with a Document Schema with active custom naming and empty metadata fields
30614	(Server updater) 'Fts.IndexLocation' key value was changed to the default value after the upgrade process
30630	(Client installer) 'Prompt to allow this app to make changes' dialog appears upon double-clicking on the FDA icon found on the desktop after server reboot
30647	You cannot use the cursor to scroll past the cache limit in a 'drop-down menu - database lookup' metadata field when trying to select a value
30672	(FDA) Selecting inactive item in a db lookup field of a file shows green pill instead of amber
30691	Metadata change history cannot be displayed for an archived document
30701	Ocr.ExcludeExtension key in managed options should allow only pdf or tiff
30702	Ocr.ExcludeExtension also affects compression
30703	(2FA) Domain users should not see their multi-factor authentication option when logging using an external provider
30707	Workflow sign-off sheet shown for wrong document version in specific scenario when initial offline version is set to 0
30717	(FDA) CSV from grid does not work with multiline text fields
30736	An unexpected error occurs when opening any extraction rule on a second monitor with different display scaling
30739	(FDA) Missing vertical scrollbar when schema has a long list of metadata fields set when trying to configure a watched folder
30750	(Portal) Insufficient permissions error occurred when a 'portal user' assigned with a 'FileHold viewer level 1' or 'level 2' license attempts to view a document
30767	Linked documents count not updated after parent document deletion
30768	(Web Client) The Effective Permission report does not display permissions for domain users
30804	(FHIT) Failed to import a FH16.3 library configuration to 17.1.1
30831	It is possible to initiate a one-time review for a group who does not have permission to be a workflow participant
30860	(FDA) Unexpected error occurs when a system administrator logs in to a 17.1 server with hosted mode enabled and support users with an FDA version earlier than 17.1
30868	Date filter in the batch jobs list does not produce expected results

30887	(Portal) Browser cache display issues in the WebClient/Portal after upgrading
30909	(FDA) It is possible to add an invalid URL in the connection options dialog
30911	Administrator message is missing from the password reset notification if the administrator resets the user a second time
30944	(FDA) Greyed out toolbar buttons in Recently Added even if a document was selected / highlighted in the list
30969	(FH viewer) Unexpected error when inserting a .txt file as a page
30973	(ADI) The default value for 'Importation.DeleteProcessedEntriesAfterPeriod' setting in managed options is in the wrong format
31000	(WebClient) Cannot convert a file between electronic documents and records
31001	(WebClient) Double-clicking on save button in metadata panel can cause duplicate versions of the same document
31018	(Viewer) Unable to display MSG, EML, or HTML based documents
31025	Syntax error in search with two or more file or metadata conditions where one condition contains only a wildcard character
31045	(ADI) Indirect file columns that do not exist as fields in the current row schema cause an error for the record when they should be ignored
31061	FileHold web client cannot be opened in an iframe on different domain when external authentication is used
31073	(FDA) Installer may fail if there is a permissions issue in the context of the installation user and the workstation documents folder
31103	Wrong number of linked documents associated with the child file upon deleting its linked parent file
31107	(FDA) Strange alert message(s) appear when attempting to edit metadata of multiple documents in workflow show documents or the document tray
31111	(MS Teams) Unexpected error appears during synchronization in specific scenario
31152	Workflow status report - unable to filter by current activity participant when WF progress is more than 0%
31153	(FDA) Workflow status report - dropdown lists for initiator or current activity participants to not appear
31180	Advanced search configuration allows setting the maximum number of search results to a value higher than the maximum number of intermediate search results
31188	(FDA) "Prompt me before automatically cleaning up my working documents" is not dependent on "Automatically clean up my working documents"
31190	The option for SMTP basic authentication and no encryption is missing in the email configuration options
31199	(FH Viewer) Unable to open document by some readers after redacting content
31211	(FDA) Wrong status of 'duplicate' or 'older' local file(s) opened in their respective app(s) that are to be deleted from the Working Documents list
31212	(FDA) Smart check-in failure where the file missing its hash in the working documents database
31216	(FDA) 'Custom date' grouping in a folder view is not consistent with its Date metadata custom format
31239	(FH viewer) Incorrect file type validation for .msg files with misleading chrome dependency
31248	Word properties merge tag does not work with assemble in footer
31266	Auto-filing uses an unnecessarily slow method for resolving the folder location with an auto-filing script
31383	Wrong action type and missing details in Usage log when converting to PDF
31463	The default value of the Lifecycle.Task.ProcessingTimeLimit managed option should be 360 minutes instead of 1800 minutes
31520	(FDA) Unexpected error occurred upon changing search operator from 'No older than' to 'Between'
31521	Email notifications related to workflows cannot be processed
31525	Date format in the email of the insufficient Capture CAL logs does not follow our standard administrative reporting pattern
33469	Document events cause an unexpected exception in certain circumstances

8. KNOWN ISSUES

ID	Title
8530	(FDA) Word table not correctly formatted in Brava viewer. Users should use 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).
24922	(Viewer) Documents published from a PDF form with a multi-section field with multiple values selected, will lose some of the selected values.
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.
28763	(FDA) Manage imports cannot configure a specific folder as a destination when that folder has auto-tagging enabled.
30348	Insufficient sessions log contains repeated entries when Capture is unable to acquire a session license.
30671	(FDA) Duplicate dropdown menu values may have issues when one is inactive, and another is active.
31576	Insufficient permissions error when modifying a saved search after deleting a metadata field that is part the search criteria.
31616	(WebClient) Unable to inline edit date, checkbox, and drilldown metadata fields.
31617	(WebClient) Unable to inline edit dropdown menu fields.
31620	(FDA) Unable to initialize component exception in rare circumstances when double-clicking a document and the double-click option is set to viewer.
31624	(WebClient) Error when editing metadata for multiple documents containing a date field in a specific scenario.
31672	(WebClient/MobileWebClient) Schema lookup cannot fill a drilldown menu field.
31676	(WebClient/MobileWebClient) Unable to scroll to the end of a long dropdown metadata field.
31685	(MobileWebClient) Cannot download 2 GB or larger files.
31715	The user mass editing user data cannot include themselves in a mass edit.
31722	(FH Viewer) The copy to clipboard icon does not copy to the clipboard. Use CTRL+C instead.
33395	(OutlookAddIn) Log in does not function in macOS when using Safari.
33468	Logs may contain "???" instead of a user name when the user was deleted at the time of the log entry.