

# FileHold

## Release Guide

### version 18.1

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# 1. FILEHOLD 18.1 OVERVIEW

This document is a high-level description of the new features and enhancements of FileHold 18.1. FileHold 18.0 was only released for special purposes, but all the of the changes for 18.0 are included in this release guide.

# 2. SYSTEM REQUIREMENT CHANGES FOR FILEHOLD 18.1

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 SQL Server 2016
- Microsoft Windows Server 2016

## 2.2. Retired features

The following features are no longer available with FileHold.

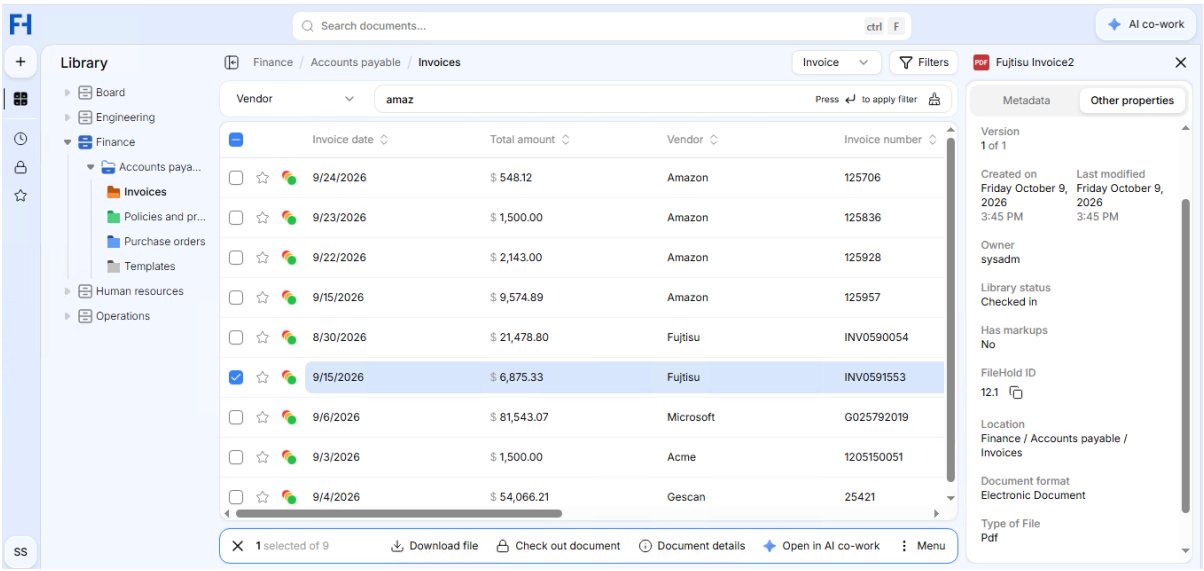
- Brava viewers. These were deprecated in 2017. The “Brava” licenses owned by customers can be used to get access to the FileHold level 2 viewer.

# 3. NEXUS CLIENT

The Nexus client is the next generation client technology for FileHold. Familiar, but redesigned from the ground up using the latest industry leading technologies and user experience.

In this version, Nexus is not a complete replacement for the classic FileHold clients, but over time it will grow to include all classic client features. Nexus is the client where new client features will be added to FileHold.

Nexus features focus on functions used by the highest possible population of users: adding documents, searching for documents, check-out and check-in, download files, and view documents. See the knowledge base for a matrix of differences between the various FileHold clients.




The Nexus client is a licensed option and requires the REST API to operate. Contact your FileHold reseller or FileHold sales to enable the Nexus client.

## 3.1. New client features

The following features are new and only available with the Nexus client.

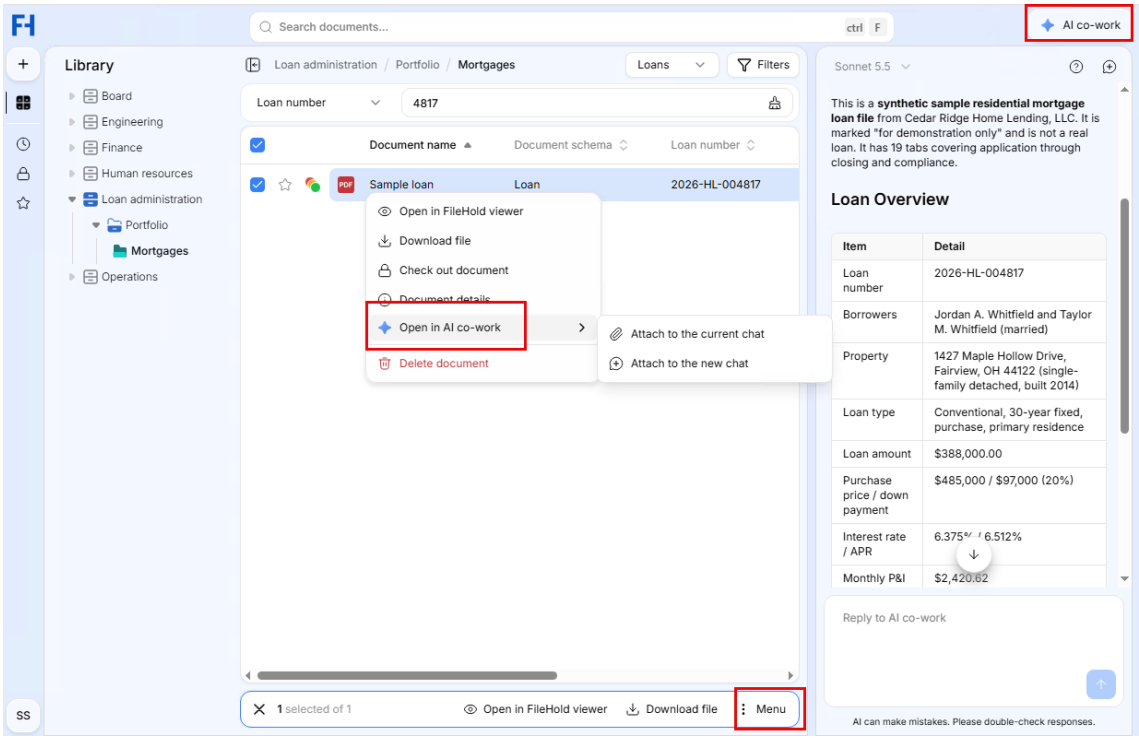
- Infinite scroll – Document lists that are longer than a single page do not require page by page navigation. Simply continue scrolling down the list to see all the documents.
- Document list filter – When displaying a document list, after opening a folder or completing a search, you can apply a filter to the list to quickly narrow the list without forming a new search. The filter field can be chosen from a text field defined in the view such as document name.
- Fast list response – The method used to return document list results to the Nexus client is much faster than in the classic clients.
- Drag and drop – Nexus supports drag and drop from a wide variety of applications that expose file data in their user interface. For example, a screenshot pasted to a Teams chat could be dragged into Nexus. The classic Web Client does not allow any drag and drop, and the desktop client is limited to Windows folders and Classic Outlook email.
- Add multiple files at one time – The classic Web Client only allows adding one file at a time.
- Focus on search – Simple searches and saved searches have all been consolidated to a single central search bar.
- Responsive screen layout – The screen automatically adjusts to different device screen sizes or display resolution and zoom factor.

- Simple search with drop down field – The classic clients are limited to text fields only for simple search.

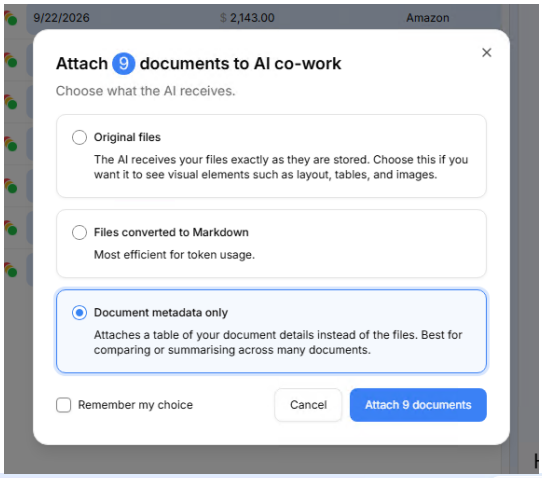
## 4. AI CO-WORK

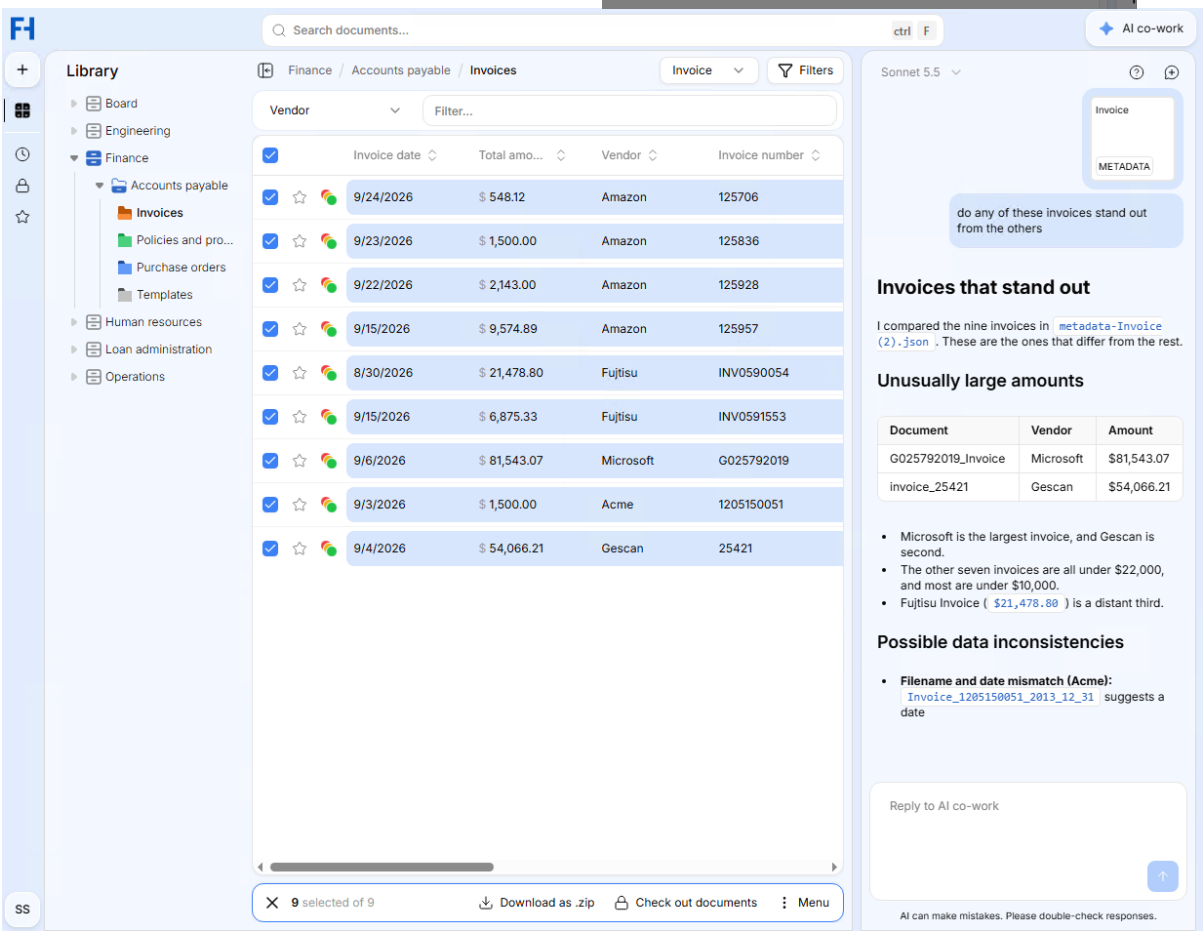
You do not have to download your documents from FileHold to analyze them with your AI tools. Your AI tools can be directly integrated into AI co-work. Simply add your selected documents to the chat and prepare your prompt. Configure your choice of large language model (LLM) or configure more than one. Use LLMs hosted in someone else's cloud or connect to your own in-house LLM.

Depending on the capability of your LLM, you can directly add your documents as-is or you can seamlessly convert supported formats into markdown to support a wider range of LLMs and reduce your input token consumption.



You can also send document metadata for analysis. Select the set of documents whose metadata you want the LLM to work against and FileHold will convert the fields into an easy to consume JSON format before sending them for processing.




AI co-work is a licensed option and requires the Nexus client to operate. Contact your FileHold reseller or FileHold sales to enable the Nexus client and AI co-work.

# 5. REST API

A REST API has been introduced for FileHold in version 18. The API supports the features used in the Nexus client. If you can do it in the Nexus client, you can do it with the REST API. The API is OpenAPI compliant, and the documentation is available from your server instance at the URL https://myserver/fh/filehold/api/swagger/. This page also provides a platform for executing API methods.

The REST API offers a lightweight, flexible, and high-performance alternative to our traditional SOAP API, designed to accelerate your development cycles and lower infrastructure overhead.

If you are accustomed to the strict contracts and heavy XML payloads of our SOAP service, you will find this RESTful interface to be a highly efficient upgrade for modern, agile web and mobile integrations.

The REST API is a licensed option. Contact your FileHold reseller or FileHold sales to enable the REST API. The SOAP API continues to be available to support the classic and existing custom clients. Both APIs interface with the underlying application server in the same way. For example, adding a document with the REST API and the SOAP API have the same inputs, constraints, and side effects. REST and SOAP calls can be intermingled in the same application where necessary.

# 6. NEW AND UPDATED MANAGED OPTIONS

## 6.1. Authentication.EIdP.AutoSelectSingleProvider

When there is only one identity provider configured, this option will determine if it will be automatically selected or if the user must press the provider button. The default value is **true**.

## 6.2. Search.ViewerOpenOptions

Determine which search options are set when the FileHold viewer opens a document. The options are **wholeword**, **casesensitve**, **fuzzy**, or **anyword** and the default is **fuzzy**.

## 6.3. Importation.JobTimeoutSec

A more accurate name and description have been provided.

# 7. MISCELLANEOUS CHANGES

## 7.1. Workflow

Convert to PDF can now use the same list of source file types as the Assemble feature.

### 7.2. New FileHold branding

Classic client colors and logos have been updated to new FileHold branding. The installers have also been updated with the new branding and the new EULA.

### 7.3. Document usage log

New filter criteria available on the administrative report to provide the document ID.

### 7.4. Document views

The column for manually created document links has been removed from default views. For customers that user manual links, this column can be added using the normal view configuration interface. Existing views are not changed in an upgrade.

### 7.5. Automatic naming

The term “custom naming” has long been used in the product in reference to configuring automatic renaming of documents or workflows. As the term is not consistent with its purpose, all references in Nexus and classic clients have been changed to reflect the clearer term, “automatic naming”.

### 7.6. Server installer

The installation tool now has the ability to configure HTTPS bindings directly during the installation process. HTTPS is necessary when using the Nexus client.

### 7.7. Performance improvements

Performance has been improved in the following areas.

- High fidelity processing of merge tags in Office custom properties.
- Runtime health checker call to /healthz.
- Automatic Document Importation (ADI) has been updated to improve performance for dequeuing next document and reducing the number of times common objects need to be fetched.

# 8. RESOLVED ISSUES

| ID | Title |
|---|---|
| 30671 | (FDA) Duplicate dropdown menu values may have issues when one is inactive, and another is active. |
| 31013 | (AD) When a Windows domain object is deleted and a new domain object is added with the same name, the new user will not synchronize with FileHold. |
| 31576 | Insufficient permissions error when modifying a saved search after deleting a metadata field that is part of the search criteria. |
| 31614 | (WebClient) Unable to edit the time for a date field with a custom format. |
| 31616, 31617 | (WebClient) Unable to inline edit date, checkbox, dropdown, and drilldown menu metadata values. |
| 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 editing data metadata field on multiple documents in specific scenario. |
| 31672 | (Mobile/WebClient) Drilldown menu field value not filled during schema lookup. |
| 31676 | (Mobile/WebClient) Unable to scroll to the end of dropdown menu values. |
| 31685 | (MobileWebClient) Unable to download large (2 GB) files. |
| 31715 | The user mass editing user data cannot include themselves in a mass edit. |
| 31722 | (Viewer) Copy to clipboard fails in specific scenario. |
| 33395 | (OWA) Unable to login using Safari on macOS. |
| 33468 | (Admin Logs) Missing user information for deleted users. |
| 33505 | (Workflow) Unable to cancel workflow with an offline document in specific scenario. |
| 33509 | (Assemble) Unable to assemble from offline document in specific scenario. |
| 33585 | (Workflow) Unable to drill into overdue workflows from dashboard. |
| 33586 | (Reports) Duplicate cookies error. |
| 33639 | (FDA) Specific older FDA versions cannot display specific pages when connected to new server. |
| 33686 | (WebClient) Unable to set default start page to any option other than blank. |
| 33784 | (Courier) Unable to complete approve action. |
| 33918 | Health checker will show a yellow warning with SQL Server 2025. |
| 33938 | Batch job created to move files between repositories when it was not necessary. |
| 33944 | (Assemble) Unable to check in electronic document version when original version is in offline format. |
| 33972 | (FDA) Ampersand character duplicated in value when copied to clipboard. |
| 34009 | (Assemble) Append or prepend templates not taken from current version. |
| 34085 | (Search) “Does not equal” condition does not produce a logical result when used with a document usage log action. |
| 34119 | (FDA) Only a single “Raw query” search type can be selected in a single search. |
| 34144 | (Viewer) Cannot view embedded document in PDF. |
| 34190 | (ADI) Time of day used in logs does not match standard time pattern for administrative reports. |
| 34242 | (ADI) Export as CSV from job details is missing a header field. |
| 34346 | (WebClient) Comma cannot be used in document schema name. |
| 34383 | Error executing “FH Initialize FTS DocID Table” from the command line. |
| 34384 | Error executing “FH garbage collection – uploads” from the command line. |
| 34385 | (FDA) Unable to work with “Linked Document List” or “Workflow Documents” view type. |

| ID | Title |
|---|---|
| 34401 | (ADI) Jobs loading large indirect import files may never complete. |
| 34447 | (ADI) Queue is not processed when watching a folder takes more time than set in Importation.JobTimeoutSec. |
| 34459 | (Admin) Unable to execute the effective permissions report. |
| 34513 | (WebClient) Unable to mass edit metadata on multiple documents. |
| 34521 | Drilldown menu values are not correctly passed as parameters to document schema lookups. |
| 34723 | (FDA) It is possible to exit embedded browser using the SHIFT key. |
| 35055 | (ADI) Relative paths in indirect metadata files do not work in specific scenario. |
| 35086 | (FOC) Extraction rules fail to set correct document schema in specific scenario. |
| 35143 | (ADI) Duplicate document names in indirect metadata file cause error. |
| 35145 | (ADI) Duplicate imports are possible in specific error scenario. |
| 37040 | (Events) Control numbers prevent events from triggering in specific scenario. |
| 37349 | (Events) Incorrect frequency of emails notifications in a specific scenario. |

## 9. KNOWN ISSUES

| ID | Title |
|---|---|
| 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. |
| 33620 | (AD) Unable to synchronize users when the same user is duplicated in a domain group. |
| 33910 | (Viewer) Unable to view XLSX document with macro. |
| 34600 | (Viewer) It may not be possible to view MSG file in specific scenario. |
| 35005 | Unable to convert PPM, PBM, ERF, and PCD files to PDF. |
| 35025 | (AD) Unable to synchronize with domain when group managed service account (gMSA) is enabled. |
| 35026 | Direct document links to the viewer may report an error when download is requested. Use the DownloadForm.aspx link when you want a direct download. |
| 35047 | User sessions do not get automatically logged out when a document is open in the viewer. |
| 37147 | (FDA) Embedded browser may error when the FDA has not been closed for an extended period of time. |
| 37482 | (Nexus) It is not possible to enter a separator character in an “In the list” search with a numeric field. |
| 37486 | (Nexus) After refreshing the browser page, AI co-work current session options will be unavailable. Create a new session to resolve the issue. |
| 37508 | (Nexus) A document schema can be changed only when a metadata value is also changed. |
| 37509 | (Nexus) The “sign in again” button may not work. Refresh the page. |
| 37510 | (ADI) Trailing spaces in the document schema name in an indirect metadata file are not ignored. |
| 37512 | (ADI) An error should be generated when auto-filing settings in the job are misconfigured for the document schema being imported. |
| 39537 | OIDC server does not validate the client secret in client credentials flow. If you are building a machine-to-machine custom interface, and you will be configuring client credentials flow, request a patch from support. |

| | |
|---|---|
| 39540 | User activity log has incorrect “Terms” value for Nexus client when the login warning banner is configured. |