



FileNexusTM

Feature Sheet - Version 7.1

Highlights



December 2014

Web Client

- **Private Notes** – You can now add private notes to documents that will be only viewable by you.
- **Bulk Archival of Documents** - You can now select multiple documents to be archived at once through the FileNexus Web Archiver.
- **Mandatory Indexes** – You can now see which indexes are mandatory indexes when archiving a document using the web archiver.
- **Document Classes** – You can now edit document classes and their indexes directly from the Web Client. This feature was previously only available via the Database Setup program which was accessible from the FileNexus server. Now FileNexus administrators can create and manage classes directly in the FileNexus Web Client.
- **Time out Feature** - A timeout feature has now been added to the FileNexus Web Client.

Document Versioning

- A new document version feature allows multiple versions of a document to be stored together in a single record.

FileNexus Server

- All Capture and Archive Management sessions can now be created and managed using one screen
- Preprocessor sessions can now monitor multiple folders
- Image Capture sessions can now process PDF image files

Development History

Version	Release Date	Description
7.1	November 2014	FileNexus Web Client – A timeout feature has now been added to the Web Client
		Preprocessor Management - Preprocessor sessions can now monitor multiple folders
		Image Indexer – Now supports both tif and pdf files. It also allows you to rearrange pages using a new thumbnail viewer.
		Server – More user friendly versioning of documents in FileNexus
		Web Client - Ability for Administrators to edit Classes and Indexes directly from the Web Client
		Web Client - Ability for users to create private notes
		Web Client - Bulk Archival of Documents: Ability for users select multiple files for archival using the web Archiver
7.0	February 2014	FileNexus Web Portal - Ability for Administrators to Add/Remove Portal Users
		FileNexus Web Portal - Ability for portal users to change their username (email address) for Web Portal
		Web Client - Ability to hide index fields on archival. This feature allows users to "hide" index fields so that they do not appear in the web archiver indexing screens. The settings are persistent by user. You can now have Classes that contain multiple file types. For example, a class of "Loan Documents" could include .PDF, .DOC,

		.XLS, .XLSX, .TIF, etc., instead of creating individual classes for each file type.
		Web Client – Ability for users to manually create a task in the Web Client.
		Web Client – Ability for administrators to push persistence settings to other users.
		Web Client - Ability to create and modify Picklists from the Web Client.
		Web Client - Ability to create and modify Workflow Actions in the Web Client.
		Web Client – Ability to create Document Classes in the Web Client.
		Multi Language Support
		Mutli-tenant support now available for application service providers.
6.8 +	January 2013	FileNexus Web Portal – An out of the box web presentment solution that can be used by external customers, vendors, or staff on the road. No FileNexus user setups, no web developers required. Third party users can easily subscribe to view documents archived in FileNexus through a customizable web interface.
		Web Client – Content Search Quickly and easily search across all indexes for documents in a folder(s) by typing the search value in a single Content Search box instead of in individual index fields. It will search the indexes as well as the content of any full-text indexed documents with a single search value!

		Web Client – Ability to hide indexes on search screens at the user level. Settings will persist based on user login.
		Web Client – Download search results as a CSV file to conduct reconciliations in Excel or quickly create simple reports
		Web Client – Download multiple documents at once in a single zip file which can be easily emailed to internal or external parties.
		Web Client – Addition of Advanced Searching previously only available through the Windows Client. Run complex document searches using a simple web interface.
		Web Client – Ability to set the name of individual or multiple documents (zip file) being downloaded
		Web Client – Enhanced Multi-value index editor when updating indexes or inputting values to archive new documents
		Full-Text License – Now supports content searches of scanned and tif image files.
		Archive Management – New interface that uses a new FileNexus Document Processor Service. This same interface will be used in future releases to manage ALL FileNexus Sessions (PDF, Text, Email, Image Capture, etc.)
		Server – New FileNexus Document Processor Service which will allow ALL FileNexus Sessions (PDF, Text, Email, Image Capture, Preprocessor, etc.) to be viewed and managed in a single interface, resulting in easier FileNexus management and troubleshooting for FileNexus Administrators
6.61.x.xxxx+	August 2012	Web Client – My Tasks, user based task list that provides real-time status of outstanding actions based on relevant business processes
		Web Client – Right-click menu for all documents in search results list to add notes, email, edit indexes, view audit info, move documents, as well as custom defined workflow actions if applicable

		<p>Web Client – Workflow Buttons can now be added to the Web Client to represent business workflows including approvals, notifications, updates to documents in FileNexus or data in host systems, etc. Clicking on Workflow Buttons can automatically update task lists for the active user or other FileNexus users. Button tooltips, icons, and actions are all customizable by you!</p>
		<p>Web Client – Enhancements to index input validation (for editing indexes or archiving new documents via the Web Archiver). In addition to validating index input based on data type (date, numeric, currency, etc.), FileNexus can now validate user defined “Mandatory” indexes as well as the format of the index entered. For example, if a the Client # index for a document should always begin with “CN-“, FileNexus can now support live time validation as the user enters the index value.</p>
		<p>Archive Service – New option to create “temporary” archive files (.FDAR files) that can support the permanent removal of data (in addition to the removal of meta data from the FileNexus database) from an Archive file.</p>
		<p>Server – Can now set the time of day for Retention Policies to be run for FileNexus.</p>
		<p>Server – Workflow actions in FileNexus are now managed by a new Remote Script Event Service which supports synchronous and asynchronous event actions</p>
		<p>Server – Retention policies can now be set to run at a set time of day</p>
6.52.x.xxxx	August 2011	<p>Web Client – Ability to move documents between folders, edit the index values of a single or multiple documents at once, view Audit information, move and rename folders, and take advantage of Single Sign On authentication. No need to log into the Web Client if you’ve already logged into the Domain, and No Software To Install!</p>
		<p>Server – Now supports Event Triggers for updates to document indexes, adding annotations, and moving documents between folders. Event triggers can launch email notifications, update host systems, and help follow your business workflow rules with no shuffling of paper.</p>
		<p>Server – Contact Loris to find out how to create custom User Dashboards to display real-time performance of your business processes and workflow as tracked in FileNexus.</p>

		Windows Client – Enhanced Command Line Parameters integration that allows for Sub-folder searching in FileNexus
		Audit Utility – Enhanced searching allowing Administrators to track document archival by user
6.5.x.xxx	December 2010	Windows Client – Ability to view and mark up (redact, highlight, add “e” post-it notes) PDF documents natively in the FileNexus Client
		Windows Client - Enhanced Document Markup functionality; ability to set default markup level system wide (document, user, class), improved Text Markup interface, and ability to set which users have the rights to add User Level markups.
		Scan Station and Image Indexer - Ability to index and burst documents scanned as PDFs in the Image Indexer
		Scan Station and Image Indexer - Pre-populated and highlighted drop-down menus in the Image Indexer to minimize data entry errors simply by creating/maintaining the valid input through a FileNexus UI
		Scan Station and Image Indexer - Ability to more easily replicate Scanning and Indexing settings between PCs
		Image Processing – FileNexus IPS now replaced by an improved Image Capture license that sits on the main FileNexus Server similar to PDF and Text capture services. This allows administrators simpler more centralized configuration of image processing and email alert notices if an image capture session stops abnormally.
		Audit Log Utility – Ability for FileNexus Administrators to review activities in the FileNexus System by user, group, folder, action, date, etc. or combination of criteria
		Data Capture Setup Program - Improved rendering/viewing of sample PDF documents when creating Capture Setup Files (.ini templates) for reports
		Data Capture Setup Program - Easy to use UI for Administrators to enable Search Pick-lists (auto-populated drop-down menus) for the FileNexus Client and Web Client, and Input Pick-lists (pre-populated drop-down menus) for the Client Archiver, Web Archiver, and Image Indexer (no more text files to maintain)

		Data Capture Setup Program - Enhanced Document Class setup with the ability to add a Multi-value Index on new Document Classes. Users will now be able to search for documents that may contain multiple values for an index resulting in more meaningful document search results.
		Server Installation – The FileNexus Server software can now install on Windows 2008 R2 (64 bit) OS along with SQL Server 2005 or 2008 (32 or 64 bit)
		Archiving – More efficient storage of data; have eliminated need to store duplicate data in .FAR files – if the same physical document must be stored to FileNexus more than once, than only a single instance of the document will be archived and compressed. The single document instance will have multiple database records pointing to it. When using the FileNexus Client to retrieve a document based on an individual database search result record, the original file will be loaded.
		Client Archiver - Ability to route documents to a specific network folder for archival (using Description Paths) in lieu of using the default Client Archiver directory on the FileNexus Server. This allows you to segregate your data at the user, customer, or other level to ensure documents are automatically routed to a specific Archive Session to help maintain data integrity.
		Database Setup Program - Simplified user interface; easier for FileNexus Administrators to link to a FileNexus Database, create a new FileNexus Database, update FileNexus tables, and update existing Document Classes.
6.3.4.6142+	June 2009	Windows Client – Improved and simpler display of Multi-value Indexes in the <i>Search Results Grid</i> with the ability for users to quickly review multi-value index values by using a hover hint, auto-preview, or the default search results view.
		Windows Client – Improved UI for <i>Search Results Grid</i> allowing users to take advantage of column order persistence after rearranging index columns. Changes in the grid will reflect in the Search Pane and vice versa.
		Windows Client - Descending Sort Order by default. View your search results in the FileNexus Client from the most recent to oldest archived date by default.

		Client Archiver – Highlighted populated pick-lists for the user to easily identify when to select a value from a drop-down menu instead of keying it in.
		Web Client – Improved UI with simpler viewing of documents with Multi-value indexes and well as the introduction of a dynamic Search Results Grid that is similar to the Windows FileNexus Client.
		Administration in the FileNexus Client – Ability to designate FileNexus User(s) as the Managers of specific FileNexus User Groups.
		Administration in the FileNexus Client – Ability to set up and assign Concurrent User Licenses by Group (designated user licenses per department, customer, other).
		Data Capture Setup Program – Enhanced UI for FileNexus Administrators to easily set up the capturing of meta data from documents to be archived when configuring capture settings files for the Email, Text, and PDF modules.
		Image Indexer Program – Ability to easily replicate indexing settings between PCs and set up populated index value pick-lists to minimize user data entry errors.
		Scan Station Program – Ability to easily replicate scan settings between Scan Station PCs.
6.2.1.6072+ (up to 6.3.x.xxx)	January 2009	Updated Version 5 Web Service for backwards compatibility – Previously integrated 3 rd party applications programmed against a version 5.xxx.xx build of FileNexus can now take advantage of even faster searching/document retrieval and enhanced Web Service for V5 Web Applications in a FileNexus V6 environment.
		Search Results Grid in FileNexus Client – Improved UI in the FileNexus Client allowing users to dynamically arrange/manage document search results in an easy to read grid allowing for quick index/column rearrangement, auto-fit index views, grouping of documents based on one or more index columns, and auto-preview of documents.
		Auto-Retention Scheduling added – Ability to purge data past its required retention period based on Document Class, Folder, and date

6.100.14	July 2008	<p>FileNexus Client Server Communication – Dependency on Windows DCOM protocols eliminated which means NO additional configuration required on Client PCs after applications installed. Client applications now communicate with the FileNexus Server using enhanced Web Services.</p>
		<p>FileNexus Client Installations – Advent of ClientSetup.msi and Workstation.msi so administrators can create automated MSI rollout for upgrading or installing FileNexus V6 Client and Indexing applications on user PCs.</p>
		<p>Archive Management – Improved document archiving speeds; data enters the FileNexus System at a faster rate!</p>
		<p>Archive Management – Now using Advanced Compression; higher compression rate for archived Text, PDF, and other data to .FAR files (previous .NAR files still supported) which means less storage required on your servers.</p>
		<p>Archive Management – More efficient storage of data; have eliminated need to store duplicate data in .FAR files – if the same physical document must be archived to FileNexus more than once, the document will be archived and compressed once but have multiple archived instances in the FileNexus Client that load the original file during document retrieval.</p>
		<p>Windows Client – Addition of Index Level Security on archived documents. Administrators can now further limit which FileNexus User/Group access the documents within the SAME folder based on Index values rather than having to set all security at the Folder level. Fewer folders to manage and tighter restrictions keeping your documents secure!</p>
		<p>Windows Client – Improved UI for the document Search Pane; easier to understand comparison operators, clear previous search criteria button, search options added, and simplified Advanced Search Pane.</p>
		<p>Windows Client – Dramatically faster folder and subfolder document searching and retrieval across multiple folders and multiple document classes for an improved user experience.</p>
		<p>Client Archiver – Ability to create and specify multiple destination folders (Description Paths) on the network in lieu of using the default Client Archiver directory on the FileNexus Server. This allows you to segregate your data by type, department, customer, or other factors to ensure documents are automatically routed to the appropriate Archive Session to help maintain data integrity.</p>
		<p>Data Capture Setup Program – Enhanced Document Class setup providing the ability to add a Multi-value Index on new Document Classes. Users will now be able to search for documents in the FileNexus Client that may contain multiple values for the same index resulting in more meaningful document search results.</p>

		Database Setup Program – Simplified UI; easier for FileNexus Administrators to link to a FileNexus Database, create a new FileNexus Database, update tables, and update Document Classes.
		FileNexus Email Module – Ability to automatically index and archive incoming/outgoing emails for Microsoft Exchange users saving valuable space on Mail Servers and helping your organization stay compliant with correspondence retention and archival.
		FileNexus Universal Application Link (UAL) program – FileNexus UAL allows users to link directly to documents in FileNexus from almost any Windows application (JD Edwards, MS Word, Excel, Harris Financials, etc). No custom programming required; simply press a hot-key combination, highlight the search value in your Windows application (Invoice number, Account number, etc) and FileNexus will automatically search for the document and display the search results in the FileNexus Client.
		Web Access – Improved UI and functionality; faster searches and additional features previously available only in the FileNexus Client now included in the out-of-the-box Web Access module.
		Web Services – More robust functionality available; additional features that were previously only available to users in the FileNexus Client can now be made available to users accessing FileNexus through a Web interface.
5.405.13 (5.329 + same features)	May 1 2007	PDF Server Module – PDF files can be read and automatically identified through the FileNexus identification service.
		PDF Overlays – Form Overlays can now be set up for PDF documents.
		Web Access – Improved user interface with enhanced Windows Explorer type navigation, document retrieval and search capabilities.
		Web Services Kit - new integration kit allows developers to access documents stored in FileNexus through applications that can consume web services. It's very useful for customer self-service sites, bill presentment etc.
		Client Archiver – Added ability to employ static drop down lists in the FileNexus Client Archiver program to ease data entry and ensure consistent input.

		Windows Security Integration – FileNexus can now authenticate user passwords against a LDAP or Windows Domain server.
		User and Group Administration – Improved administration handling of document folder security at the User and Group level.
		Logging – Right clicking on a document now allows you to see log entries about the document (i.e. who archived the document, if the document was moved to the folder from another folder etc.)
		AFP Module – Improved identification processing that supports unknown AFP codes.