



# Release Notes

Version 3.8.9



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# 1 About this Release

These Release Notes provide information on the latest version of our industry leading Office Management System, GreenFolders.

The following documents have been updated as part of this release:

Item	Document
1	Release Notes
2	Administrators Reference Guide

## 1.1 Scope

The scope of these release notes includes introducing new features, a description of the improvements and revisions, and changes to GreenFolders Plugins.

## 1.2 Audience

The audience for this document includes individual users and the Administrator, who configures the GreenFolders application for the users.

## 1.3 Definitions, Acronyms and Abbreviations

Item	Term	Description	Type
1	GF	GreenFolders	Acronyms
2	SMTP	Simple Mail Transfer Protocol	Acronyms
3	SSL	Secure Sockets Layer	Acronyms

## 2 System Requirements

The system requirements for GreenFolders are described in detail in the sections below.

### 2.1 Supported Platforms

GreenFolders supports the following Windows platforms.

- **32-bit/64-bit Windows** – Supported on 32-bit Windows operating systems running on either a 32-bit x86 compatible or an x64 compatible processor.
- **64-bit Windows** – Supported on 64-bit Windows operating systems running an x64 compatible processor.

### 2.2 Supported Operating Systems

The following Operating Systems are supported by GreenFolders for 32-bit and 64-bit environments.

- Windows 7
- Windows 8
- Windows 8.1
- Windows Server 2008 R2
- Windows Server 2012 R2

**Note:** GreenFolders relies heavily on the .NET 4.0 Framework. As long as this dependency is met, we support most versions of Windows.

### 3 New Features

The following new features have been introduced in this release.

#### 1. Security Key Management (GF-523)

The security settings section provides Administrators the ability to define when the Security Key used to encrypt Fields and Attachments (through Security should be changed for enhanced security).

**Note:** Because changing the Security Key is an intensive process that could affect overall system performance, it is highly recommended that you update Security Keys during non-production hours.

A new tab labeled “Security” has been added in the Settings section of Configuration.

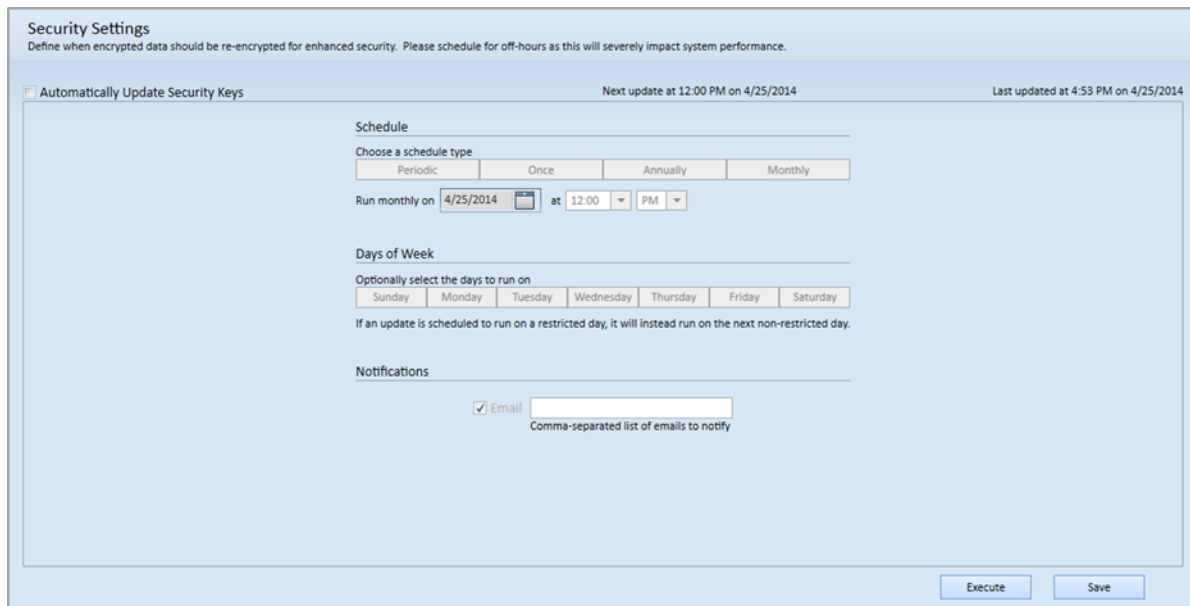
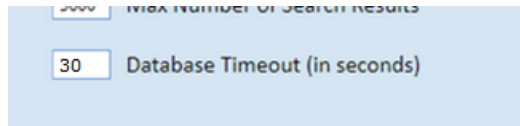


Figure 1: Security Settings Tab

2. **Allow admins to configure timeout settings for the database (GF-960)**

Under Configuration\Settings\User Settings, there is a new setting of ‘Database Timeout (in seconds)’ at the bottom of the screen. This value determines the length of time for database calls to timeout. The default is 30 seconds.

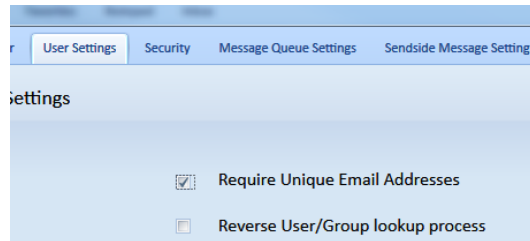


*Figure 2: Database Timeout Setting*

3. **Improve the initial load time of the User list (GF-1057)**

A new setting is available under Configuration\Settings\User Settings.

“Reverse User/Group lookup process”



*Figure 3: User/Group lookup setting*

This setting will be deselected by default, which means GreenFolders will function as it does in versions prior to and including 3.8.2.

In previous versions, when a user clicked ‘Assign To’ to assign a Folder or Task, the system checked Security Privileges and then displayed a list of Users/Groups that had privileges for the Folder Type.

If this setting is selected, the process for looking up Users/Groups works in the opposite way. It displays the full list of Users/Groups, then, once a User or Group is selected and the user clicks OK, the system checks to see if the selected User or Group has sufficient Security Privileges. If so, the item is assigned. If not, a notification displays that they cannot be assigned the item.



*Figure 4: Insufficient Privileges Notification*

## 4 General Information

The following changes have been made as part of this release.

1. **Update Copyright information (GF-578)**

Copyright information was updated throughout GreenFolders.

## 5 Improvements

The following improvements were implemented as part of this release.

1. **Update Attachment Components (GF-1116)**

The components for performing operations on attachments (viewing, rotating, etc.) have been updated to newer versions. This was done to help prevent problems when adding newer PDF documents as attachments.

2. **Add additional warning message for deleting Folders (GF-1105)**

An additional warning message has been added when deleting folders to help prevent the unintentional deletion of Folders from GreenFolders. The following message will now be displayed in addition to the current message when deleting folders:

“All information contained within the selected Folder(s) will be DELETED from the GreenFolders system. This action cannot be reversed. Are you sure you want to continue?”

3. **When performing searches, only select a maximum number of results (GF-961)**

When performing searches GreenFolders selected well over the known limit for the search, now it only selects a maximum number of results equal to the configurable setting to improve search speed.

4. **Update GreenFolders EULA (GF-799)**

The End-User License Agreement (EULA) is modified for the Client Installer, Client Installer from automatic upgrades pushed from the Server, and Purchase Folders dialog.

5. **Loading time of the Search Results Context Menu is slow (GF-725)**

The loading time of Context Menu that displays when right clicking search results has been improved for better performance.

6. **Output MSI installers in addition to EXEs (GF-664)**

MSI installation files are now available for GreenFolders in addition to the existing EXE files.

7. **Automatically set Labels and Parties\Contacts based on Attachment Type or Predefined Names (GF-649)**

Administrators can now define Labels and Parties/Contacts to be automatically associated with attachments based on the attachment type or predefined name used.

8. **Add a 'Secure Connection' column to Database Stores (GF-636)**

Added a Secure Connection column to the database stores. The column displays True or False according to the IsSecure property of the corresponding database store. If the database store's provider type is not SQL Server, the Secure Connection column is not displayed.

9. **Implement Command-Line support for copying files (GF-593)**

Added support for copying files with the command-line. (This was added as part of the revision for GFA-5)

10. **Change Configuration items to not default Security Privileges to Grant (GF-570)**

When a new item (Application, Folder Type, Attachment Type, Label, Message Template, Task Template, or Task List) is created in Configuration, access will now be granted only to the current user.

11. **Change Groups to not default Security Privileges to Grant (GF-569)**

When a new Group is added to GreenFolders, Security Privileges will now default to neutral (Not Checked).

12. **Add SQL Server SSL support for secure authentication (GF-546)**

The Server Configuration now has an additional option to provide secure authentication via SSL Certificate installation.

13. **Set Currency Control type text to be vertically aligned center (GF-535)**

The text for the Currency Control type was shown vertically aligned Top. This has been changed so that text is vertically aligned Center, to match the other control types.

14. **Set Currency Control Type Font to match the GreenFolders default font (GF-534)**

The font for the Currency Control type was incorrect. The font has been changed to the GreenFolders default font, to match the other control types.

15. **Change network traffic to always be encrypted (GF-524)**

Network traffic will now always be encrypted.



**16. Add Application Name in data sent to Sendside (GF-344)**

The Application Name is now automatically sent to Sendside as part of the Sendside Message Settings field mapping information. (The field is not mapped, it is always sent)

**17. Improve Folder Header display when multiple Plugins are installed (GF-259)**

At lower resolutions or when several Plugins were installed the Print and Edit buttons were not viewable. This display will now wrap so that Print and Edit buttons will always be displayed.

## 6 Revisions

The following revisions were made as part of this release.

**1. Changing a folder status on the Home Screen does not execute Workflow Rules GF-1160)**

When a user changed the status of one or more folders on the Home Screen, associated Workflow rules were not being executed. This has been corrected.

**2. User can edit the previous version of a folder (GF-1132)**

Under very rare circumstances a user could edit the previous version of a folder. This has been corrected.

**3. Search Results change based on MAX Search Results setting (GF-1094)**

Under very rare circumstances the number of results displayed on the Home Screen could be affected by the MAX Search Results setting. This has been corrected.

**3. Error Dragging and Dropping attachments (GF-1045)**

Occasionally an error was displayed when attempting to Drag and Drop PDF files to GreenFolders. This has been corrected.

**4. Error displayed when searching if MAX Search Results are set to 9999 (GF-998)**

An error was displayed when attempting to search with a MAX Search Results setting that ended in a number other than zero (0). This has been corrected.

**5. Viewing PDF attachments causes GreenFolders has stopped working error (GF-996)**

Occasionally attempting to view PDF attachments would cause GreenFolders to display a “GreenFolders has stopped working” message. This has been corrected.

**6. Cannot Send Sendside Messages (GF-986)**

Some users received an error, which prevented them from sending Sendside messages. This has been corrected.

**7. Manual Folder Purchase is not possible (GF-968)**

Attempting to perform a manual Folder Purchase sometimes caused an error. This has been corrected. (Manually purchasing Folders is special process that requires assistance from GreenFolders)

**8. Manual activation of GreenFolders License (GF-956)**

Attempting to perform a manual Folder Activation sometimes caused an error. This has been corrected. (Manually activating is special process that requires assistance from GreenFolders)

9. **Attachments are not updated in the correct file store (GF-746)**

Attachments were being updated in the source file store instead of the destination file store after a Data Migration policy was executed. This has been corrected.

10. **Annotations are not updated in the correct file store (GF-745)**

Annotations were being updated in the source file store instead of the destination file store after a Data Migration policy was executed. This has been corrected.

11. **Searching with weeks, months or years criteria returns no results (GF-706)**

Performing a search with 'weeks', 'months' or 'years' as search criteria was not returning results as expected. This has been corrected.

12. **Data Migration policy will not stop executing (GF-704)**

After executing a data migration policy and it running for over a day, attempting to stop the execution would not work until the GreenFolders Service (Server) was stopped. This has been corrected.

13. **Migration Policy saves all migrated attachments under one day folder. (GF-688)**

Executing a Migration Policy moved all the attachments from the Source File Store to the folder for the Current Year in the Destination File Store instead of maintaining the existing year structure of the source file store. (For example – Files from 2010, 2011, etc. would all be placed in a folder for 2014 instead of maintaining the 2010, 2011, etc. structure). This has been corrected.

14. **StreamLine error when saving to GreenFolders (GF-639)**

While attempting to create or save folders or attachments, a message is triggered indicating that the folder is not that a new folder should be created, even if the folder exists. This has been corrected.

15. **Opening a PDF causes GreenFolders to close (GF-669)**

Occasionally attempting to open PDF attachments would cause GreenFolders to close. This has been corrected.

16. **Extra data sent to SendSide contains illegal characters (GF-632)**

When a SendSide message was sent, the information sent using the additional fields included characters that caused an issue with the message. This has been corrected.

17. **All annotations are not displayed on thumbnails (GF-631)**

If a user added annotations to an attachment, then another user added annotations to the same attachment, only the first user's annotations were being shown on the thumbnail. This has been corrected.

**18. Error rotating/document cleaning selected page(s) for TIF files (GF-622)**

When you select the thumbnail and select the rotate or document cleaning option, an error is displayed. This has been corrected.

**19. Error copying selected page(s) to new/existing attachment (GF-620)**

If a user copied selected pages from a TIF to a new or an existing TIF or PDF document, an error was displayed. This has been corrected.

**20. Error trying to print preview a single page of multi-page TIF (GF-619)**

If a user viewed the print preview of a single page of a multi-page TIF an error was displayed. This has been corrected.

**21. Error printing selected page(s) of multi-page TIF (GF-618)**

If a user printed selected pages of a multi-page TIF, an error was displayed. This has been corrected.

**22. Task context menu shows folder statuses (GF-611)**

If a user attempted to modify the status and priority of folders in search results data grid by right clicking and choosing a Status or Priority, the Status or Priority list displayed was for folders instead of tasks. This has been corrected.

**23. Renaming external folders, no longer found in search results (GF-610)**

After renaming a folder that included field data from an external database, the renamed folder would not be found in the search results. This has been corrected.

**24. Task Priorities and Status colors do not display correctly on HOME (GF-592)**

The Priority and Status colors were not changing with the color picker on Task based searches displayed on the Home Screen. This has been corrected.

**25. Merging large TIF images causes out of memory error (GF-588)**

If a user attempted to merge a TIF image that was very large with an existing attachment, an out of memory error would occur. This has been corrected.

**26. Burning annotations distorts/blurs the image (GF-587)**

If multiple users added annotations and then burned them to a PDF attachment, the image would become distorted or blurred. This has been corrected.

**27. Error displayed after clicking “Save” with an Editable Window open (GF-586)**

If a user opened an attachment with an Editable Window, placed an annotation on the attachment, then clicked Save, an error would be displayed. This has been corrected.

**28. Internal field does not display data correctly when added to multiple forms (GF-576)**

If an internal field is shown on multiple forms, the data would not display correctly for each form. This has been corrected.

**29. Date picker button crashes GreenFolders (GF-572)**

When you select a date field on the forms, tasks, or saved searches and click on the date picker button, it crashes GreenFolders. A locked exception window opens and you cannot click on any of the buttons or type in the window to send the details back. This has been corrected.

**30. Color display for Data Grid fails when the Task Due Date is NULL (GF-568)**

In rare cases, the logic that displays the colors in the Data would fail if a Task Due Date was NULL. This has been corrected.

**31. Cannot remove attachment from the Add Attachments window (GF-567)**

If a user attempted to remove an attachment from the Add Attachments window by clicking the “X,” an error was displayed. This has been corrected.

**32. Error caused when copying an attachment that has been annotated with an annotation containing an imbedded image (GF-565)**

An error was caused by copying an attachment that had been annotated with an annotation that contained an image as part of the annotation. This has been corrected.

**33. Columns button works intermittently on Attachments list (GF-560)**

When sorting for the attachments list was changed to Advanced, the columns button displayed would work intermittently. This has been corrected.

**34. Attempting to refresh (reload) a folder causes an error (GF-559)**

If a user added new pages to a multipage attachment, then selected one of the newly added pages, THEN clicked the refresh (reload) button, “Error loading image” would be displayed. This has been corrected.

**35. Task Status options are incorrect on HOME (GF-557)**

The options displayed for Task Status by the Right Click menu on HOME were shown for the Folder instead of the Task. This has been corrected.

**36. Cannot use keyboard shortcuts in Currency Fields (GF-544)**

If a user attempted to use keyboard shortcuts (Ctrl A, Ctrl X, Ctrl C, or Ctrl V) while in a field set to display as currency, nothing happened. This has been corrected.

**37. Date controls in Table Fields display “Select a Date” in the cell (GF-536)**

Cells that have been set with the Date control will now display blank instead of “Select a Date” as intended.

**38. Discard Messages Notification is shown when no changes are made (GF-530)**

Administrators and Users will no longer be prompted to save changes to a Message or Message Template if no changes were made. This has been corrected.

**39. Flags are hidden if the thumbnail size is changed (GF-510)**

If a user changed the size of the thumbnails, any flag that had been set would disappear until the folder was saved or closed/opened. This has been corrected.

**40. The Thumbnail Pane resets to the initial view if the size of the thumbnails is changed (GF-509)**

If a user changed the size of the thumbnails, the Thumbnail pane would reset to display the first thumbnail, instead of the current thumbnail. This has been corrected.

**41. Data Policy execution prompt defaults to YES (GF-507)**

The prompt for executing a Data Policy will now default to NO instead of YES to prevent the unintentional execution of a policy.

**42. The currently selected task changes after navigating to another area of the folder (GF-506)**

If a user selected a task on the Tasks tab, then navigated to another tab (Example: Notes), then returned to the Tasks tab, the selected task would be the first task in the list, not the previously selected task. This has been corrected.

**43. Advanced search checkbox is not checked by default when creating new fields (GF-486)**

If the Administrator created a new field, the advanced search checkbox was not checked. This has been corrected.

**44. Right-clicking folders or tasks from a search and performing any action can fail and crash GF (GF-468)**

During a folders or tasks search, right-clicking on the items and performing most actions retrieves the folder from the server, however if this fails or if it cannot lock the folder, GF crashes. This has been corrected.

**45. Attachment Context Menu Item “Open with editable window” is enabled for Frozen Attachments (GF-433)**

The Open with Editable Window selection of the context menu for attachments was incorrectly enabled when an attachment was frozen. This has been corrected.

**46. Task list order does not save correctly (GF-432)**

The order of the Task Templates set in configuration under a Task List was not maintaining the order correctly when new templates were added to the Task List. This has been corrected.

**47. No Results are found for Folder Created Date when searching today (GF-403)**

Searching for Folder Created Date and the operator “IS” did not return the correct results for the current date. This has been corrected.

**48. Save All does not remove the lock for folders that have no changes made (GF-377)**

If the user had multiple folders opened, then chose Save All, the folders that were locked for editing but had not been changed, remained open. Folders locked for editing that have not been changed will now close (saving is not necessary as no changes have been made) when using Save All.

**49. Advance Search does not show all expected results for searches with mixed criterion (Folder/Task) (GF-319)**

Task based advance searches that included criterion for a Folder based search were not returning all of the expected results. This has been corrected.

**50. Searching Internal Database Fields and External Database Fields within a single search yields inaccurate results (GF-265)**

While searching for folder status using internal Database fields and external Database fields (GreenFolders and ProForm) within a single search, the search yields inaccurate results or no results. When the search is conducted separately, the expected results are yielded. This has been corrected.

**51. Attempting to deselect "Sum" on home page causes GreenFolders to close (GF-216)**

Under rare conditions attempting to deselect “Sum” from a tab on HOME where it had been previously selected, would cause GreenFolders to close. This has been corrected.

**52. Search results hit search limit but the actual results are less than the limit (GF-190)**

Searching using criteria for both GreenFolders data, and data from an external system, that had results known to be less than the MAX Search Results setting, sometimes displayed a message indicating that the search had exceeded the maximum search results. This has been fixed.

**53. Null exception on server when saving folder, fails to retrieve attachment storage info (GF-69)**

A Null Exception on server error would be shown in rare cases where the user had added an attachment but had not saved the folder, and then attempted to perform other operations on the attachment (such as Merging). This has been corrected.

**54. Task searches do not return results with folder type permissions turned off (GF-40)**

If the “Everyone” selection was removed from Permissions and then Permissions were turned off, Task based searches would not return results. This has been corrected.

**55. Searching on internal date values returns incorrect results (GF-38)**

Searches using Internal Date Values were sending an incorrect time value to the database causing the search results to be incorrect. This has been corrected.



## 7 Plugins

The following Plugins have been modified as part of this release.

### 7.1 GreenFolders Adobe Reader Plugin

#### 1. **GreenFolders Adobe Reader Plugin crashes when saving to GreenFolders (GFA-5)**

Using the “Save to GreenFolders” option with the Adobe Reader X plugin to GreenFolders caused an error and closed Adobe Reader X. This has been corrected. (Both the Plugin and GreenFolders must be updated to correct the issue)

## 8 Deployment Instructions

The deployment instructions are split into two sub-sections, one for Server and one for Client. It is recommended that you consider all relevant details such as Security, Firewall, Database setup, first-time configuration of the application as an administrator, and so on, prior to deploying the new version. For more information about upgrading, contact GreenFolders Support. [Click here to contact the GreenFolders Technical Support.](#)

### 8.1 Deployment Instructions

The deployment instructions for the Server are described below. If you are not familiar with the GreenFolders upgrade process, it is recommended that you contact GreenFolders Technical Support for assistance or to schedule an upgrade.

Note: Prior to beginning the upgrade process, completing a full backup of the GreenFolders and all GreenFolders Application databases is highly recommended.

Note: Microsoft .NET Framework 4.0 is required for this version of GreenFolders. It should be installed prior to starting the upgrade.

- Verify all users are logged out of the system.
- Stop the GreenFolders Server and GreenFolders Update Server services.
- Install the new version of GreenFolders Server.
- When the 'Server Config' application displays, verify/test the database connections.
- Start GreenFolders Server service from the 'Server Config' application.
- Close the 'Server Config' application.
- Launch the GreenFolders Client (see Client instructions) and login as Admin.
- A prompt to upgrade the database is displayed. Click OK.
- Once the database upgrade has completed, users can upgrade the client software and login.

## 8.2 Client Instructions

The deployment instructions for the Clients are described below.

Note: Microsoft .NET Framework 4.0 is required for this version of GreenFolders. It should be installed prior to starting the upgrade. The user must have Administrative privileges on the local machine to perform the upgrade.

- Install GreenFolders Client.

Note: If the Client is already installed, launching the client will automatically detect a new version and prompt the user to upgrade. The user can also click the 'Check for Updates' link on the Login window to check for updates.

- Once the upgrade completes the user can login.

## 9 Contacting Technical Support

You can contact the GreenFolders Support Team at:

Phone: 801-747-2132

Fax: 801-747-0376

Email: [gfsupport@greenfolders.com](mailto:gfsupport@greenfolders.com)

Or contact us by using the following means:

Address: GreenFolders, Inc.  
181 East 5600 South  
Liberty Hall Bldg, Ste 370  
Murray, UT 84107

Product Inquiries and Sales Support:

[gfsales@greenfolders.com](mailto:gfsales@greenfolders.com)

GreenFolders Website:

[www.greenfolders.com](http://www.greenfolders.com)