

What's New

Fabasoft Folio 2021 Update Rollup 2

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1 Fabasoft Folio 2021 Update Rollup 2

Fabasoft Folio 2021 Update Rollup 2 contains following changes.

1.1 Improvements

Fabasoft Folio 2021 Update Rollup 2 contains all hotfixes of Fabasoft Folio 2021 Update Rollup 1 and additional fixes.

Fabasoft Folio Services

- Setup: When defining the index tablespace for `COOSVCx` the correct index tablespace is checked.
- Setup: The minimum Microsoft Visual C++ Redistributable version is checked to allow updates.
- Setup log: `fsc_database_sqlserver_password` has been added to the list of sensitive keys.
- A race condition when installing Fabasoft Folio with Mindbreeze integration has been fixed.
- The error "No such file or directory" during a kernel shutdown has been fixed.
- `HasAttribute` also works when the reference parameter is passed as a string.
- Short references of imported components whose object names are valid simple references are correctly parsed.
- `fscadmin checkconsistency` finds missing files in any case.
- `CheckContents`: The version information of inconsistent objects is shown, too.
- It is ensured that the error message "License key invalid" is not shown in case of a valid license key.
- License checks do not cause high `COOSVC1` thread workloads.
- Dedicated properties for COO service and target database credentials are available in a database export definition.
- WebDAV: An out of range exception caused by missing error handling/path validation has been fixed.
- Kernel: A memory leak caused by passing a pointer has been fixed.
- Certificates are saved correctly.
- The Mindbreeze integration can be upgraded (Linux).
- `FSCPDFGEN`: PDF metadata is stored even if the value is `NULL`.
- LibreOffice can be used for the conversion path `finalize-xlsx` to pdf.
- The content of image objects can still be replaced after commenting.

Fabasoft Folio Web Client

- Propagated security settings are removed when the container object is deleted.
- When leaving the detail view, the form page will not be scrolled to the top even if the form has only one page.
- Roundtrip of an aggregate member property is triggered when clicking on a branch assigned to the aggregate.
- No missing lock error is shown when navigating between addressees using the navigation buttons.

- A dictionary for filtering Mindbreeze search results is available.
- Mandatory properties in aggregate lists are correctly considered.
- Nested aggregate lists with simple layout are correctly displayed.
- It is ensured that the global wastebasket date folders get the correct ACL.
- The performance of the workflow rights propagation has been improved.
- It is ensured that activities are not removed when using parallel prescriptions.
- Inactive users and groups are ignored when evaluating the workflow participants based on organizational unit and position.
- The name of user environments in Folio installations is not computed to improve the search performance when searching for user environments by name.
- `FSCTEAMROOM@1.1001:domainbackgroundusersender` and `FSCTEAMROOM@1.1001:domainbackgrounddefsender` can be configured in Folio installations.
- Children in the property `objchildren` are not deleted when the container that does not have a room context is deleted.
- Liferay Portlet: Hyperlink branches in object lists are correctly displayed.
- Liferay Portlet: The context-sensitive help is correctly displayed.
- Liferay Portlet: Hyperlink branches are available in object pointer lists.

Fabasoft Folio Client

- The Outlook e-mail import dialog can be canceled.
- A specific proxy server for the Fabasoft Folio Client can be defined using a registry key.
- When importing an e-mail in a constructor form the object will not be committed implicitly.
- The sender of e-mails is parsed correctly.
- When importing an e-mail directly in a file, the kind of e-mail import (e.g. only e-mail text) is already considered in the constructor form.
- If a Word document is edited and a version is created, the preview is saved synchronously and correctly assigned to the version.
- The Folio Folder is not created automatically without manual user interaction.
- Config values are deleted from the registry before writing new values to consider removed entries.
- The proxy handling is adapted to the Edge standard.
- A specific proxy server for the Fabasoft Folio Client can be defined using a registry key.
- The `app.telemetry` API 2021 is used.
- The state of the Microsoft Office add-ins is available in the telemetry.
- Client certificate authentication is enabled for all requests.
- LAN synchronization supports the use of multiple network connections simultaneously.
- If errors occur during import using copy and paste, folders will not be created instead of documents.
- Umlauts in e-mails are correctly displayed independent of the encoding.

1.2 Supported Third-Party Products

The following new third-party products or versions are supported. More information can be found in the software product information.

Fabasoft Folio Services

- PostgreSQL 12.7
- ExifTool 12.26 (Linux)
- AdoptOpenJDK OpenJDK 8 Update 292 (JRE, HotSpot, Microsoft Windows)
- OpenJDK 8 (JRE, headless, included in the supported operating system)

Clients

- Mozilla Firefox 90.0
- Google Chrome 92.0
- Microsoft Edge 92.0

Mobile Clients

- Apple iPadOS/iOS 14.7

1.3 Discontinuation

Following functionality is no longer available:

- The software component *Fabasoft Integration for Google Visuals* (FSCGOOGLEVISUALS@1.1001) is no longer available.
- The software component *Virtual Map* (FSCMAP@1.1001) is no longer available.
- The software component *Folio Integration for Google Maps* (FSCFOLIOGMAP@1.1001) is no longer available.

2 Fabasoft Folio 2021 Update Rollup 1

Fabasoft Folio 2021 Update Rollup 1 contains following changes.

2.1 Improvements

Fabasoft Folio 2021 Update Rollup 1 contains all hotfixes of Fabasoft Folio 2021 and additional fixes.

Fabasoft Folio Services

- Fabasoft Folio Kernel: The ID assignment for contents and aggregates has been decentralized.
- The token refresh for the Mindbreeze search works as expected.
- Access rights problems when propagating security properties have been fixed.
- The search performance in case there is no domain restriction has been improved.
- CleanupCASAreas: Files that do not have the expected hash prefix are ignored.
- It is ensured that the AT service update script does not create invalid XML that stops the setup process.
- Apache PDFBox 2.0.22 is used as conversion tool.

Fabasoft Folio Web Client

- Restoring an archived version works as expected.
- Display errors in the process view have been fixed.
- The change expression of an object property is evaluated even if the property is directly set read-only.
- Liferay Portal: Drop-down menus are displayed at the correct position.
- Processes that are viewed in time travel can be expanded or collapsed as expected.
- An activity that stays in all worklists can be directly delegated before starting it.
- Settings that are defined in the advanced prescription editor are stored when switching to the simple prescription editor.
- End events in nested gateways terminate the process.
- Objects with the ACL for administration can be deleted even if a global wastebasket exists.

Fabasoft Folio Client

- It is ensured that other opened Word documents are not considered during a running mail merge process.
- The URL is used as ID for telemetry requests.
- The performance of initializing the Fabasoft Folio Client has been improved.
- The telemetry of the automatic update process of the Fabasoft Folio Client has been improved.
- No misleading HTTP 500 error is shown when using LAN synchronization.
- The AppData metadata is stored version-specific.
- Copy and paste of attachments in RTF e-mails works as expected.
- Apple macOS: Documents opened in full screen windows are correctly saved.
- When importing an e-mail directly in a file, the kind of e-mail import (e.g. only e-mail text) is already considered in the constructor form.

2.2 Supported Third-Party Products

The following new third-party products or versions are supported. More information can be found in the software product information.

Fabasoft Folio Services

- PostgreSQL 12.6
- AdoptOpenJDK OpenJDK 8 Update 282 (JRE, HotSpot, Microsoft Windows)
- OpenJDK 8 (JRE, headless, included in the supported operating system)

Clients

- Mozilla Firefox 85.0
- Google Chrome 88.0
- Microsoft Edge 88.0

Mobile Clients

- Apple iPadOS/iOS 14.4

3 Fabasoft Folio 2021

Find out more about new features and improvements of Fabasoft Folio 2021.

3.1 Users

As end user you can expect the following new features.

3.1.1 Contact Management

As an alternative to the classic contact management, the new contact management is available as an app that can be enabled.

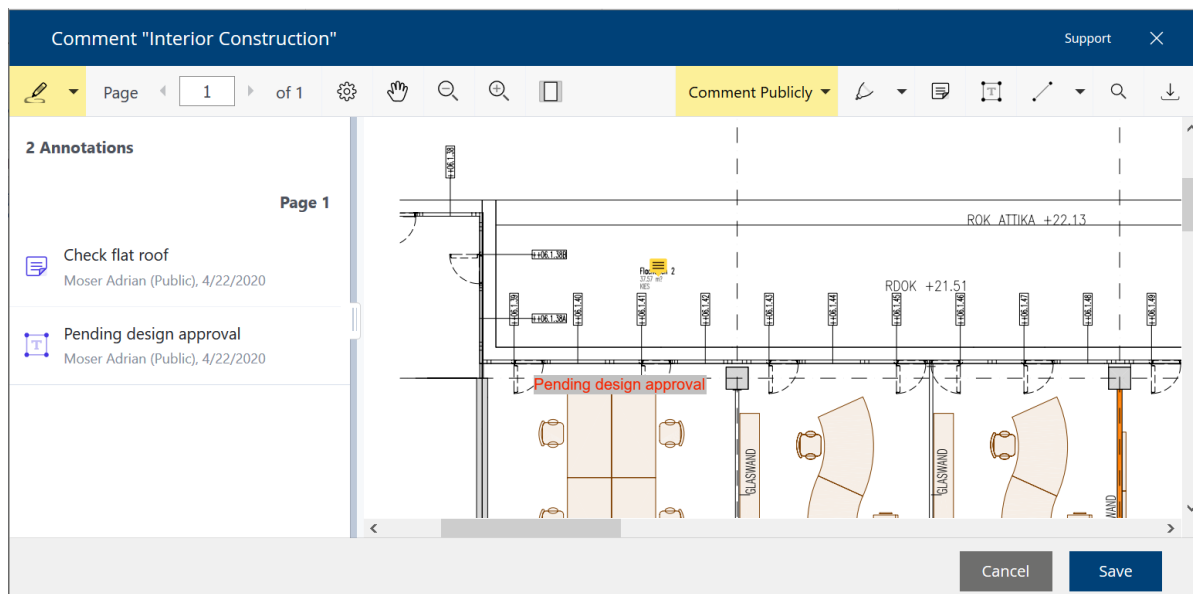
The contact management allows you to create and manage contacts in contact rooms. Based on user-defined criteria you can specify address lists that can be exported for sending newsletters, for example.

Contacts can be either contact persons or organizations. Duplicate checks support the avoidance of different datasets.

Special property values of contacts (e.g. salutation, address, telephone number and so on) can be assigned to different contact rooms and are therefore only visible to authorized users in the respective contact rooms. This makes it possible, for example, to ensure that the business contact data of employees are accessible to all employees, while the private contact data is only accessible to the HR department.

3.1.2 Commenting Documents

PDF documents or documents that can be converted into PDF documents can be commented using an integrated PDF viewer. The comments are extracted from the PDF document and saved in a public or personal layer. Thus, the document does not have to be duplicated if you want to share general comments with other users but personal comments should only be visible to you.



To attach comments, navigate in the document. In the PDF preview, use the "Comment" button to open the PDF document for commenting.

- Select “Comment Privately” or “Comment Publicly” in the toolbar.
- Use the “Drawing”, “Note”, “Text” and “Line” buttons to select the desired comment type. Depending on the comment type, further options are available.
- In the left area you will find an overview of the attached comments, which you can also delete again if necessary.

Note:

- In the content settings of a Teamroom you can define the allowed types and the preferred type of comments (public or private). The preferred type of comments set for a Teamroom is preferred over the setting in the default settings.
- The adding of public comments is also possible with read access.
- With the new workflow activity “Add Comment”, documents that are convertible to PDF can be commented. In addition, the work step “Comment” is available in activities like “Approve” or “Release”. Commented documents are marked with a status symbol.
- For annotated documents, the “Send” > “Send Commented PDF” context menu command is additionally available.

3.1.3 Synchronize Address Books

Access to contacts is also possible via third-party products such as “Apple Contacts”, which support the CardDAV standard. To do this, store the desired address lists in your address book list (“account menu (your user name)” > “Advanced Settings” > “Address Book”). Here you will also find the CardDAV URL.

In Apple Contacts you can store the CardDAV URL, your Fabasoft Folio login e-mail address and password. You can change the contacts in both Apple Contacts and Fabasoft Folio. The changes will be synchronized.


3.1.4 Table Handling

In the detail view, the alternatively available table editing can be enabled by pressing the “Table Handling” button (Alt + F2) in the column header. This makes the operation similar to a spreadsheet program:

- The cells are displayed with border lines.
- The hover highlighting is displayed per cell.
- Cells that cannot be edited are displayed with a gray background.
- Editing a cell is activated with F2, a double-click (fast and slow) or typing letters/numbers.
- A click on the object name does not open the object.

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Defects **Inbox** Backlog Sprints Impediments Documents


 <input type="checkbox"/>	Name	Priority	Requested by	↓ Requested on/at
<input type="checkbox"/>	Values Filter		Schuller Laura	09.03.2020 15:22:45
<input type="checkbox"/>	Tabularly Editin	A - Must have	Schuller Laura	09.03.2020 15:10:20
<input type="checkbox"/>	Copy and Paste	B - Should have	Schuller Laura	09.03.2020 15:04:15

3.1.5 Filtering in Columns

In the detail view, you can enable the column filter using the “Filter” context menu command in the column header. For object, date and enumeration properties, a values filter is available in addition to the text filter. When using the text filter, all rows containing the entered string are displayed. When using the values filter, all rows that correspond to the selected values are displayed.

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Defects **Inbox** Backlog Sprints Impediments Documents Product Ver:

 <input type="checkbox"/>	Name	Priority
<input type="checkbox"/>	Values Filter	
<input type="checkbox"/>	Tabularly Editing	A - Must have
<input type="checkbox"/>	Copy and Paste	B - Should have

Add Entry

Filter "Priority" Support X

Text Filter
Value Filter active

Values Filter

- (Select All)
- (Empty)
- A - Must have
- B - Should have

3.1.6 Workflow

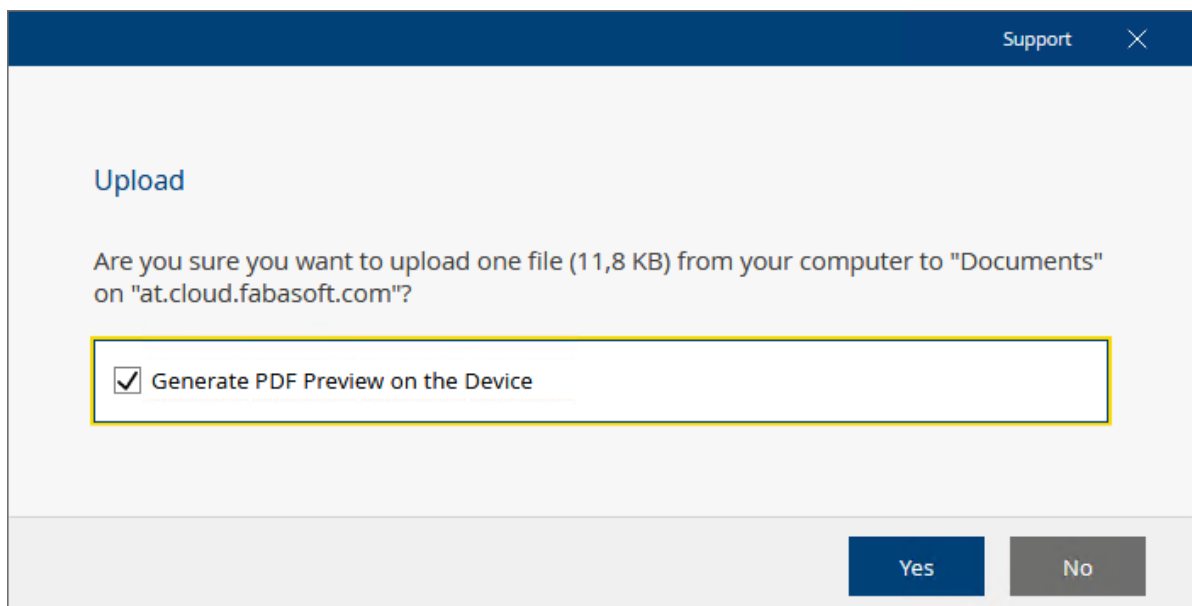
The workflow provides following new features:

- When you start a process and insert multiple activities, the last activity used remains prefilled. The “Take” button is highlighted for better visualization.

- A started process can be deleted as long as no activity has been started. For this purpose, the "Delete" button is available on the "Processes" tab in the detailed view of the respective process for the object concerned.
- You will be notified on the welcome screen when you have to perform activities as substitute (configurable under "Account menu (your user name)" > "Advanced Settings" > "Workflow"). In addition, hints are displayed in the worklist if your "To Do" list is empty, but there are activities in the substitution list.
- The new activities "Release and Close Documents" and "Close File" are available.
- For activities that apply a signature on the object, a signature is also applied if the negative work step is selected.
- In the case of ad hoc processes, an additional activity is automatically inserted for activities such as "Close", which informs the process initiator of the result.

3.1.7 Generate PDF Overview on the Device

In the Fabasoft Folio Client options, you can specify on the "Content" tab whether you want to generate a PDF view locally with Microsoft Office. If you generate a PDF view by default, you still have the option of disabling this option in individual cases when uploading in order to achieve better performance.



3.1.8 Microsoft Teams Integration

A dedicated Fabasoft Folio App is available for Microsoft Teams. The app enables you to display Fabasoft Folio on a separate tab in Microsoft Teams. In addition, in conversations you can search for objects in Fabasoft Folio and easily share them.

3.1.9 Common Improvements

- You can select an item available on "Home" that should be displayed initially after login ("account menu (your user name)" > "Basic Settings" > "General" tab > *Start With*).
- For hidden widgets, a hint is displayed on the right side of the navigation bar, regardless of whether you are directly on Home or in a dashboard.

- If background tasks exist on objects, authorized users can view them on the “Background Tasks” tab.
- When accessing Fabasoft Folio via WebDAV folders, Folio Folders or mobile apps, only those top-level items are displayed that the user also has available on Home in the web browser client.
- When a new window should be opened (e.g. via the “Open in New Window” context menu command), the web browser setting is considered whether a tab or a window should preferably be opened.
- When editing columns in the detail view, the length of the input field is increased if the column width is not sufficient for the entered text.
- Appropriate object classes are available for XML documents and XML schemas.
- Follow-ups can now also be executed repeatedly.
- Signatures are only listed in the remarks if a remark was entered when signing.
- When selecting terms for keywording, the corresponding main term is offered for selection for terms defined as synonyms only.
- Drag and drop import of multiple files and folders is now possible in all supported web browsers.
- The subject of imported e-mails is stored in an own property.
- Outlook categories of imported e-mails are stored in an own property.
- When importing a Microsoft Word document that already has metadata embedded as fields, the field values are stored in the properties of the Word object. If metadata of existing objects would change (e.g. when replacing the document), a dialog allows you to specify which field values should be stored.
- In the account menu (your user name), the “Advanced Settings” > “Workflow” entry provides the additional option *Show Deadlines for Prescriptions per Default*.
- To view the processes of an object, the “Processes” tab is available in the object's properties.
 - Completed processes are collapsed by default.
 - When you collapse or expand processes, the state is saved.
- The buttons “Add Entry” and “Search and Add” are displayed at the bottom border also for long lists and are therefore available without scrolling.
- When comparing versions, you can compare the currently selected version with any other version.
- If a base form category is entered when defining the usability of a text module, the text module is also available for documents to which a superordinate form category has been assigned.
- The *Keep Text Module Placeholders in Document* field of text modules can be used to define whether text module placeholders inserted in a Word template are replaced when a document based on the template is created. Text module placeholders that have not been replaced can be replaced afterwards in Microsoft Word using the “Replace Text Module Placeholder” button.
- Time travel can also be used to compare the contents of text modules (Word).

3.2 Process and Form Designers

As process or form designer you can expect the following new features.

3.2.1 Trace Output

As a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can now write trace output to the web browser console. To do this, you must go to the context menu of the Teamroom where the form is used, choose "Tools" > "Activate Trace Outputs" and allow trace output.

Call in expressions:

- `coobj.Trace("string");`
- `coobj.Trace("string", value);`

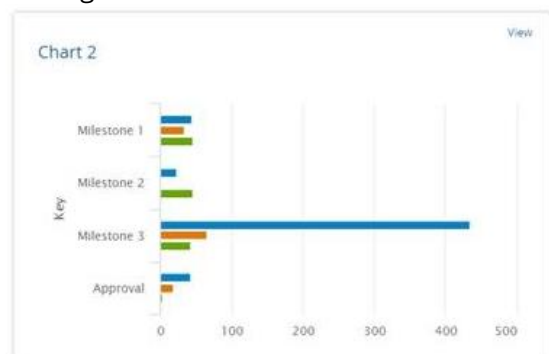
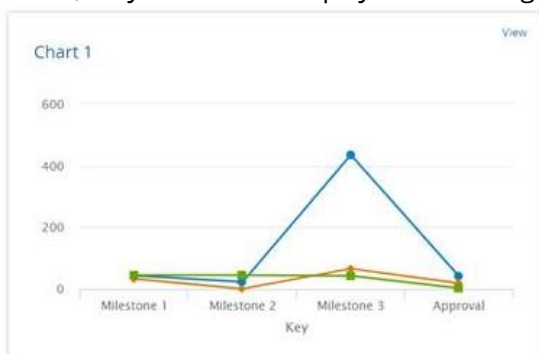
Output:

The output is a JSON data record.

- `c`
Context of the call (Teamroom).
- `d`
Current time.
- `s`
Section of the expression (if available).
- `t`
The text to be traced (first parameter of the trace call).
- `u`
Current user.
- `v`
The value to be traced (second parameter of the trace call).

3.2.2 Common Improvements

- Multiline form fields can be of type plain text, code or HTML.
- An expression can be defined that is executed when reading a field.
- For fields, control styles and control options can be defined that influence the presentation.
- For fields, a description can be defined that is displayed in addition to the label.
- If you specify a symbol for a form, it will be displayed instead of the object class symbol for objects that have the form assigned.
- Forms can also be used to define compound types, which in turn can be used in other forms as types for input fields or element lists. In addition to the standard display of the aggregate values, they can also be displayed as a configurable diagram.



- You can define for background tasks whether the background task is automatically suspended when the affected object is deleted or canceled and again activated when the object is restored.
- For tasks in BPMN processes, the following additional settings can be made on the “Extended” tab:
 - *Ignore Completion*
Defines whether subsequent activities can be started although this activity has not yet been completed.
 - *Display Activity Only if the Participant Has Access to Affected Object*
When this option is set, no warning is displayed when starting the process, if the activity goes to a team in which at least one user has rights to the affected object.
 - *Disable Substitution*
Defines whether the activity may be executed by a substitute.
 - *Escalation*
The defined escalation definition determines the escalation rules for this activity. If the standard escalation is used, a reminder e-mail is sent if the start or completion date is exceeded.
- You can define for processes whether the process is automatically suspended when the affected object is deleted or canceled and again activated when the object is restored.
- In BPMN processes, the join type (AND or OR join) can be defined for a converging parallel gateway.
- Released changes to subprocesses are taken over when subprocesses are expanded.
- The new action “Determine Retention Period Based on the Category and Close (File and Documents)” can be used in background tasks of categories to calculate the retention period and close the object or file including the assigned documents.
- The new area “Planned Activities” is available in the process statistics. This allows you, for example, to use the “Edit Properties” context menu command to change the participant of several activities together.
- When downloading BPMN process diagrams, the following options are available:
 - Download Diagram With Preview
Downloads the XML representation and preview images of one or more BPMN process diagrams including any sub-processes that may be contained.
 - Download
Downloads the XML representation of one or more BPMN process diagrams including any sub-processes that may be contained.
 - Upload
The downloaded BPMN process diagrams can be uploaded again (also in another installation if applicable). Either a single XML file or an entire ZIP file can be uploaded. If a ZIP file is uploaded, existing diagrams can be updated.

3.3 Administrators

As administrator you can expect the following new features.

3.3.1 Customizing

You can adapt Fabasoft Folio to your requirements by means of model-based customizing.

Customizing Objects

Here you will find a brief overview of the customization options available to you.

- **Templates**
Nearly all objects and especially documents can be defined as templates. In this way new objects or documents based on a template can be created.
- **Text Modules**
You can use text modules to insert predefined standard texts into Microsoft Word documents.
- **Forms**
User-defined forms can be used to add fields to objects for storing application-specific data. To apply logic or specific behaviors to the fields, Fabasoft app.ducx expressions can be used.
- **Categories**
Categories can be assigned to objects and thus influence the behavior of the objects.
- **Processes**
Processes can be individually defined reflecting your business and organizational structure. BPMN process diagrams are used to design executable business processes. Beside predefined BPMN processes, ad hoc processes can be started as needed.
- **Display Settings**
Predefined display settings can be provided to users who need special views on lists.
- **Search Forms**
Predefined search forms can be provided to users who need an overview of currently existing objects based on defined search criteria.

Customizing Levels

Customizations are managed at different levels:

- **Global**
Global customization is done by defining customizing collections in the “Templates and Presettings” dashboard.
Note: Global BPMN process diagrams, forms and categories are not available in an app context by default. If these customizing objects have to be available in an app context, they must be explicitly referenced in the app configuration or in the app room.
- **App**
In apps, such as the contact management, you can make customizations in the app configuration that are only valid within the app configuration context.
- **Room**
In rooms (e.g. app rooms or Teamrooms), customizations can be made that are only valid within the room context. You can access the customizing objects via the “Templates and Presettings” action.
- **Personal**
Personal customizations can only be used by the users themselves. The following customizing objects can be managed at the personal level: templates, ad hoc process templates, display settings and search forms.

3.3.2 Release of Customizing Objects

In order to use customizing objects, they must be released for usage depending on the context.

Rules

- Customizing objects must be released if they are assigned to a customizing collection or an app configuration.
- Forms and BPMN process diagrams must also be released if they are assigned to a room.
- Personal customizing objects do not have to be released.

Actions and Context Menu Commands

The actions are available to administrators and processors of a customizing collection (global level) or app administrators (app level).

- Release for Usage
You can create a release version using the "Release for Usage" action.
- Re-Release
Changes can be released using the "Re-Release" action.
- Withdraw Release
You can use the "Withdraw Release" action to withdraw the release.

Release Process

In app configurations or customizing collections, you can define a release process in the settings, on the "Default Values" tab, in the *Release Process for Templates and Presettings* field. Release processes must contain the "Release for Usage" activity.

If a release process is defined, the following actions or context menu commands are offered:

- Start Release Process
Starts the defined release process.
- Open Current Release Process
Opens the release process that is not yet completed.
- Start Release Process Again
Restarts the release process (is only displayed when the current release process is completed).

3.3.3 Common Improvements

- An existing installation of Fabasoft Folio 2013 or higher is required to perform an update.
- The Fabasoft Folio configuration can be done using a single configuration file which is applied to the installation.

```
fsceval -eval "coodomain.Configure('/path/to/settings.expr')"
```


For more information see <https://help.folio.fabasoft.com/index.php?topic=doc/Administration-Help-Fabasoft-Folio-eng/configuration-tasks.htm#automatic-configuration>.
- In the current domain, on the "Placement" tab, it can be defined in which COO store the objects of the defined object classes are created. Object classes not configured are distributed to all COO stores. If a COO store that belongs to another tenant should be used, the *Allow All Tenants* option must be selected.

Note: Placement configuration changes and new COO stores work immediately without the need to restart all Fabasoft Folio Kernel instances (neither the current nor others).

- On Microsoft Windows 10 Pro workstations that are joined to a Microsoft Active Directory domain, the Fabasoft Folio Client setup automatically installs the web browser extensions for all supported web browsers.

To prevent these web browser extensions from being installed, there are parameters that can be specified when installing the MSI package:

```
msiexec /i <msipath> CHROMEEXT=0 EDGEEXT=0 FIREFOXEXT=0 THUNDERBIRDEXT=0
```

3.4 Discontinuation

Following functionality is no longer available:

- The editions Fabasoft Folio Enterprise, Fabasoft Folio Governance and Fabasoft Digital Personnel File are no longer available.
- The software product Fabasoft Folio/Human Resources (`ComponentHR`) and the software component *Digital Personnel File* (`FSCPERSOANELFILE@1.1001`) are no longer available.
- The connected domains functionality is no longer available.
- The object-based audit logging is no longer supported. Read access to the object-based audit log is still possible. The database-based audit logging can be used instead.

Following third-party products are no longer supported:

- Microsoft SQL Server 2016 SP2
- Microsoft Internet Explorer 11.0
- Mozilla Lightning 68.0
- Autodesk AutoCAD 2013 SP1.1