

-----**V5.4.0**-----

Enhancements / New Features:

organiseit is NO LONGER Supported on Windows XP, Windows 2003 Server, SQL 2005 and is NO LONGER COMPATIBLE with Office 2007.

1. Diary / Day-Book:

1.1. Diary allows you to Add/View Notations from a centralized location instead of navigating to Individual Documents/Folder for the same.

1.2. The System allows the User to lookup for the Folders of the Entities that are imported from the Third-Party application that interfaces with organiseit. (E.g., Client, Policy, Memo, Claim, Case etc.).

1.3. The System will allow the User to

1.3.1. View all its Notations on a given day

1.3.2. View all Notations for a specified Period (for itself or by any other User)

1.3.3. View all Notations for a specified Entity (E.g., Client, Policy, Memo, Claim, Case etc.), done by any User.

1.4. The system allows to the User to drill down to a Document/Folder by double-clicking on the Diary Entry.

1.5. Reports:

1.5.1. All Notation by a User for a specified Day or Period

1.5.2. All Notations by Any User for a specified Day or Period.

1.5.3. All Notations on a specified Entity (Client, Policy, Memo, Claim, Case etc.)

2. GUI Changes:

2.1. To see the Archived Contents of a folder, right-click on the folder and select "Show Archived Items".

3. Optimisations:

3.1. Search Actions for Folder:

3.1.1. Changing Folder Descriptions

3.1.2. Find and Replace

3.2. While saving changes through the Property Window

3.3. Global Find and Replace

4. Administration Module:

4.1. The system now displays the Un-assigned/Available License in the User Screen and the Session Management Screen.

BugFixes:

1. System allowed the user to continue working on certain windows even after its Session is killed.
2. System allowed the User to Re-open a task which is already open.
3. Error occurs when the user tries to logon to the application using the Named Pipe Protocol and when a port number is specified along with the Instance name.
4. Outlook crashes when the User uses the organiseit Add-in. Microsoft has released some security updates for Windows due to which certain API calls are no longer available.
5. Application crashes or becomes non-responsive when it is trying to access the Default Work Folder path ("My Document\MyOrganiseit"). This is due the Security Updates released by Microsoft whereby certain API calls are no longer available.
6. A Document Class appears Multiple-times, in the Drop Down list of the Search Screen, if the Document Class which is In-Active has been assigned to one or more documents.
7. In certain screens the Date is not displayed as per the format specified in the Regional Settings of the User.
8. System does not recognize the password of the user, after it has changed the password and stays logged on, on all subsequent attempts to change the password without logging off from the system.
9. System appends an apostrophe, to an existing one, when a folder is dragged from Windows Explorer and drop into organiseit.
10. The Search Action window was a non-modal child of the Search window.

V5.3.0

Enhancements / New Features:

1. organiseit is compatible with the following Cloud platforms:
 - 1.1. Microsoft Windows Azure
 - 1.2. Amazon Web Services
2. **Overcoming Long Path Issue / Setting up of organiseit's Work Directory for A User/ Re-Locating the "MyOrganiseit" Directory of A User:**

2.1. In the earlier version when the My Documents folder is re-directed to a network path which is deeply nested users were not able to add documents to / open documents from organiseit due to the long path issue. Even if the deeply nested path was mapped to a drive Windows would always return the long UNC path instead of the mapped drive.

2.2. To overcome this issue the system now allows the user to specify a path for the organiseit Work Directory which is unique to that Windows User (which means NO TWO USERS MUST use the same directory as the Work Directory). It can be a path to a folder on the local drives, a UNC path or a mapped drive. organiseit will then create its various work folders under that specified path for that Windows User.

2.3. organiseit also allows the Administrator to setup a Default Path for the Work Directory for all the users of a Machine (particularly useful in Terminal Server Environment). Once the Administrator sets the Work Directory, each Window's user can then:

2.3.1. Use that Path for the work directory OR

2.3.2. Override the path specified by the Administrator and select a different Path OR

2.3.3. Use the Application's default Path (i.e., My Documents\Myorganiseit)

2.4. The Administrator also has the option of "Resetting" the path of all the Users of that machine or only for those Users who are yet to logon to organiseit for the first time.

2.5. The path can be set by right-clicking the paperclip icon (HereToThere) in the systray and selecting the "Working Folder" tab in the "Preferences".

2.6. This path can be changed at any point of time.

2.7. **NOTE: THE ISSUE MAY STILL OCCUR IF THE FILE DESCRIPTION IS TOO LONG. IT IS DUE TO HOW MICROSOFT WINDOWS HANDLES LONG FILENAMES.**

3. Add-ins:

3.1. organiseit's Add-in is now available in PowerPoint. It allows pushing PowerPoint files, either in its native format or in the PDF format, into organiseit.

3.2. The system will now have a common Add-In file for 32 and 64 Bit Microsoft Office.

3.3. The add-in will now appear under a tab/ribbon called "organiseit" instead under the "Add-in" ribbon. (The Add-in ribbon may still show the organiseit buttons but they will non-operational and can be deleted without having any impact on the Add-ins of organiseit).

3.4. Enhancement for Outlook:

3.4.1. Any mail that is residing in Inbox or any of its sub-folder is pushed to organiseit, by using the Outlook Add-in, then that mail will be moved to a folder called "_Sent to organiseit", which will be created under the Inbox

("Inbox_Sent to organiseit"). This will help User in managing its Inbox. If a mail, residing in any other mailbox, is pushed to organiseit then that mail will be moved from its current mailbox to the "_Sent to organiseit" folder under the Inbox of the Default Mailbox or PST.

3.4.2. Similarly if any Outgoing email is pushed to organiseit by setting "Send Outgoing Emails" to "Yes" then that Sent Email will be moved to a folder called "_Sent to organiseit", which will be created under the "Sent Items" ("Sent Items_Sent to organiseit". Same is true for any emails that are residing in the "Sent Items" folder or any of its sub-folder.

3.4.3. organiseit Add-ins will now be visible when an Email is being composed or viewed (this window is called the Inspector Window). Earlier the Add-ins used to appear only in the main window of Outlook.

3.4.4. The user can now send Selected Attachments to organiseit.

3.4.4.1. User can now select the attachments that it would like to save to organiseit and click the "Save Attachment(s) to organiseit" button. This will push only those attachments that were selected.

3.4.4.2. To save all the attachments of the email into organiseit, simply click the "Save Attachment(s) to organiseit" without the need to select any attachments. **NOTE:** However with this option any other images, like the signature, in the body of the email will also be sent to organiseit – this is due to a known issue in Outlook.

3.4.5. An Administrator of the Machine/Server can NOW control how the Outgoing Emails are to be handled by the organiseit Add-in and whether the User can override that setting. This can be done by right-clicking the Paperclip in the Systray (HereToThere) and going to the "Add-ins" tab in the Preferences. The Administrator has the option to Allow / Prevent the User from changing the Settings. The Users have to RESTART Outlook for the changes to come into effect.

3.4.6. Limitations:

3.4.6.1. When a Draft email is pushed to organiseit using the Add-ins then that Draft Email will not be moved to "_Sent to organiseit" due to limitations of Outlook.

3.4.6.2. User will **NOT** be able to **send Selected Attachments** to organiseit in case of a **Draft or an Un-Sent email** due to limitations of Outlook. In this case ALL the available attachments including the signature will be sent to organiseit.

4. Tasks:

4.1. New Menu – “Task”. Options available are:

4.1.1. “Task List” – Will open up the Task Tab. If a Tree View Window is open then the system will make the “Task” tab the current tab else it will open up a new window and make the “Task” tab the current tab.

4.1.2. “Download Task Template” – This will allow the user to download the template file for the task which then can be used to fill in the details of the task and then submitted using the “Import Task” option. As of now the Template and Import Task features are applicable for interface between ibais and organiseit.

4.1.3. “Import Task” – This will create task based on the details available in the Excel spreadsheet that is submitted. The format of the sheet must match with the template provided by the system.

4.2. Re-opening of Closed Tasks: A task, which is closed, can now be re-opened by the Owner of the Task or by the “Admin” User. Once the Task is re-opened it can be amended as any other Open/New Tasks.

4.3. Changing of Owner of the Task: The system now allows changing the Owner of a Task, provided the Task is not “Closed”. Either the current owner of the Task or the System Administrator (i.e., the User “Admin”) can change the owner of the Task.

4.4. By Default, the Task will now be created as “Private” task. Earlier the Task were created as “Public”.

4.5. The Assignees can mark their part as complete by ticking/selecting “Mark as Complete”.

4.6. The owner of the Task or the System Administrator (i.e., the User “Admin”) can forcefully complete a task by ticking/selecting “Complete on Behalf of All”. This option can be used when no further action needs to be taken on the Task.

4.7. A new tab for Reminder is now shown in the Task. It shows all the Reminders that are set on the Task by the Owner, System Administrator and Assignee(s).

4.8. The Assignees can now:

4.8.1. Set their own Start and End Date. If the dates fall outside the range set by the Owner then the system will warn the user.

4.8.2. Set “% Completed”. This is for reporting purpose and does not have any impact on the Task.

4.8.3. Can set Reminders on the Task. These reminders can be assigned to itself or to other users.

4.9. The Notes Tab has been moved and the Notes can now be viewed in the Attachment Tab.

4.10. The number of steps to enter the Notes has been reduced.

- 4.11. When an attachment is added to an Existing Task, the New Attachment are visually shown in a different colour to distinguish it from the existing Attachment(s).
- 4.12. A task can now be re-assigned to a User who had earlier rejected the task.
- 4.13. A User can now be removed from the Task which is assigned to it. Earlier the System did not allow removal of users leading to task staying as In-Complete when a user has left the organization or is no longer active.
- 4.14. The Search Screen has been modified to so that the criteria "Assigned To ..." and "Owned By ..." can be used in a single Search request.
- 4.15. Automation: Tasks can now be created by taking input from a spreadsheet. The spreadsheet must adhere to the template that is provided by the system. This feature is currently available for interface between iBais application and organiseit.
 - 4.15.1. The template can be downloaded from Task → Download Task Template and saved to a folder on the User's System.
 - 4.15.2. The User can then fill in the columns of the template with the data from ibais application and save the modified file back to onto its System.
 - 4.15.3. The filled in template file can then be submitted to organiseit to create tasks by using the Task → Import Task.
 - 4.15.4. Organiseit will put a value "Y" against the column titled "Processed" if it is successfully able to create a Task based on the information available in that row. If it is un-successful then it put a value "N" and the reason of the failure in the column titled "Remarks".
 - 4.15.5. The User can re-submit a processed spreadsheet again and organiseit will skip those rows that has a value "Y" in the column titled "Processed" and process only those rows where the value is either "N" or the cell is empty.
- 4.16. User(s) can now open Multiple Task Windows and keep switching between them without having to save and close before moving to the next one.

5. SQL Connection Protocol:

- 5.1. The system now allows the Administrator, of the PC/Server, to select a Protocol which the organiseit component installed on that PC/Server will used to connect to the SQL Database.
- 5.2. The Protocol can be set by right-clicking the Paperclip in the Systray (HereToThere) and going to the "SQL Connection Protocol" tab in the Preferences.
- 5.3. Once the Connection Protocol Settings are changed, it advisable to log-off from the Client Component and re-login and If the machines hosts the organiseit Webservice then it is advisable to re-start the Web Service (restarting the Web Site under which the Web Service is hosted).

5.4. The available settings are:

- 5.4.1. Default – When this setting is used then the application will connect to the SQL Database using a protocol that is set as Default in that SQL Instance.
 - 5.4.2. TCP/IP – When this setting is used the application will connect to the SQL Database using the TCP/IP Protocol. Use this protocol when the SQL Database is on a remote server / on Cloud. (E.g., the client is connecting to the SQL Database using a VPN Connection). Using this protocol on slow networks can lead to performance gain. To use this setting make sure that the TCP/IP Protocol is enabled on this SQL Instance.
 - 5.4.3. Named Pipe – When this setting is used the application connects to the SQL Database using the Named Pipe Protocol. Use this protocol if the SQL Instance and the clients are on the same Local Area Network. To use this setting make sure that the Named Pipe Protocol is enabled on the SQL Instance.
6. Earlier when the User used to log onto organiseit (Main Module) and it had another active session then the earlier session is Killed without any warning. Now the User will be warned when they login to organiseit (Main Module) and if their previous session is still on. The user will have to confirm if it wants to continue logging onto the second session and if the user does confirm then its previous session will be killed.
 7. Changes to Command Line Parameters – Changes to the command line parameter are done so as to have a more meaningful and standardized approach. The old Command line parameters will still be supported but are deprecated. Application Vendors who interface their applications with organiseit using should now start using the new set of parameters in all their new development.

7.1. Command to **Add Documents** to organiseit

organiseit.exe /n /a [/d] /pp:<Value> *(If the <Value> ends with a filename then that particular file will be inserted into organiseit database and if it ends with a folder name then all the files in that folder will be inserted into organiseit database)*

7.2. Command to **Search Documents, Folders or Both** in organiseit database either on a Name or a Keyword

organiseit.exe /n /s [/i | /m | /b] [/pk:<Value> | /pn:<Value>]

7.3. Command to do a **Quick Find** of Folders in organiseit database on a Name

organiseit.exe /n /q /pn:<Value>

*/n - Mandatory Switch for all operations
/a - Add a Document
/s - Search Documents or Folders or Both
/q - Quick Find
/i - File, Used in conjunction with the "/s" switch
/m - Folder, Used in conjunction with the "/s" switch
/b - Both, Used in conjunction with the "/s" switch
/d - Delete the file from the given path once it is successfully inserted into the organiseit database*

/pp:<Value> - Path to a file or folder
/pn:<Value> - Name of a file or folder or both
/pk:<Value> - Keyword attached to a file or folder or both

8. Reports:

8.1. A report on the Noting is now available. The user can choose to generate a report either on all the Noting or the Noting for a specified period.

9. Capturing of the Actual Creation Date of a Document: System will now capture the Actual Creation Date (and time) of the document when it is added to organiseit database. This is the date (and time) when the document was actually created outside the organiseit database. This field will be used in future versions during archiving of data. This important when historical data is added to organiseit and they are to be archived by their actual creation date and not by the date when they were added to the database.

10. File Recovery: Earlier when organiseit crashes or its process is killed for some reason, and the user logs back in, the documents appear as locked and any changes done in those documents are lost, and even if they are lost, to update those change in to organiseit was a tedious process. Now the user use the "File Recovery" option to save back the changes to organiseit. The "File Recovery" option can be found on the context menu of the File or in the "Unlock Files" Window.

11. Lost & Found: Earlier when the User while Adding a Document to organiseit decides not to do so then the application used to clean that document from its temp folder and if the User has taken the decision accidentally then it loses the work done on that document. Now if the user decides not to save the document into organiseit, the system will store that document in the "LostAndFound" directory for two days before finally deleting it. The "LostAndFound" directory can be found under the User's organiseit Work Directory.

12. Optimisations:

12.1. Loading of Icon for the Documents.

12.2. A Global connection to read data.

12.3. Frequently used queries.

12.4. Processing of XMLs

12.5. Windows Monitoring Service – Memory Management.

13. GUI Changes:

13.1. Document Icon: In the earlier version the icon on the document used to be the icon of the application associated with that document (which was different to what one sees in Windows Explorer). Now the icons on the document will appear same as they appear in Windows Explorer.

- 13.2. Size of the Document: Earlier the size of the document used to appear once the document is successfully saved into the database. At times particularly for Scanned Documents or the ones coming from a PDF Printer the size of the document is either too large or too small indicating something is not right with the document this might lead to lot of un-necessary documents getting stored into the database. Now with the size appearing before the document is saved to the database the user can see the size and be able to identify if something is amiss.
- 13.3. Reminders: Now when the reminder is due, the system will flash the application icon on the Taskbar and also a Bell Icon will appear in the Systray and make them more prominent and less likely to be missed out.
- 13.4. Property Window: Additional Information is shown in the Property Window of the Folder; like to which Third-Party application and Entity a folder is linked to, the number of subfolders and documents under it and the total size of the documents that are under its hierarchy. This will also help cutting down the turn-around time during a Support Call.
- 13.5. Windows Explorer Style Behaviour of the Tree, when a User right-clicks on a folder in the Tree View.
- 13.6. Modal Windows Changed to Non-Modal: Some of the Modal windows in the system are now changed to Non-Modal giving the user the flexibility to multi-task.
 - 13.6.1. Archive Error Log
 - 13.6.2. Category Master
 - 13.6.3. Checked-Out File List
 - 13.6.4. Compare & Move
 - 13.6.5. File Monitor
 - 13.6.6. Find & Replace
 - 13.6.7. Keyword Master
 - 13.6.8. Recycle Bin
 - 13.6.9. Reminders
 - 13.6.10. Settings
 - 13.6.11. Task
 - 13.6.12. Template
 - 13.6.13. Unlock Files
- 13.7. Search Menu Option under the Archive Menu this will open the Search Window with a default criteria to Search for the Archived Documents and / or Folders.
- 13.8. The Refresh Button on the Toolbar will Default to Refreshing of the Selected Folder. To refresh the complete tree select the "Tree" option from the Refresh Button Menu.

14. Administration Module: A report that will list all the Active Users in the System, Globally as well as Database-wise, is now available.

15. XML Interface: From now on the system will automatically Delete those XMLs from the "Success" folder which are older than 3 months and from the "ErrorFiles" folder which are older than 6 Months.

16.Installation Module:

- 16.1. Enhancement to setup the application, Web Service and /or Database on the Cloud Environment.
- 16.2. Changes in the Client Installation Screen, for Inputs on Settings of the Outlook Add-in and also for the Default Path for the Work Folder.

BugFixes:

1. Error occurred while Purging a folder whose parent is yet to be purged.
2. Error occurred when User selects an Option from the "New" toolbar button after selecting a document in the Archive View.
3. Error occurs while trying to close the application when the Keyword/Category Lookup window is opened from the Property Window.
4. The Audit Description field in the audit trail for the Archiving Action, on a folder which is archived because the child is archived, does not show the details of the user whose action has led to archiving of the folder. The details of the user is captured but not shown.
5. In the error report that the system generate if the path of a document has the "\\N" characters then the system treats it as a New Line instead of treating those characters as part of the path.
6. Error occurs when using the organiseit Add-in after selecting "RSS Feeds" or some system folders that does not list Emails.
7. Error occurs while trying to Search for Archived Items using the "Search From Here" option.
8. Duplicate results were returned when Searching using the "Search From Here" option.
9. Errors occurs while opening the Recycle Bin when an ID of a file is same as its Parent folder and both the folder and the file are deleted.
10. System allowed to a User to save a Task after removing all its attachments.
11. In Administration Module, the "Create Archive Database" button becomes disabled after the details of a Company/Database is modified.
12. Invalid Audit Trail Entry generated when saving a Document whose Document Class is "UnKnown" and a Document Naming Expression is defined against this Document Class.
13. System allowed setting up of Archive Database with a Duplicate Name.

-----V5.2.0-----

Enhancements / New Features:

1. Enabling processing of "SubAgent" Entity of iBAIS Application.
2. Under the Refresh Toolbar Button, the User now has the option to either Refresh a Folder or the complete Tree.

Bugs Fixed:

1. Error while installing on Windows 8 when the machine is upgraded from an older version of Windows to Windows 8.
2. Error while opening of Microsoft Office files after an in place upgrade of Office is carried out.
3. Performance issues while loading folders in the Tree View.
4. Locking/Wait Issues while carrying out Search on Documents and Folders in the Search Screen.

5. Delay in loading the tree on closing the property window after a new document is added to organiseit.
6. Notes are not properly wrapped-displayed in Properties & Notes window.
7. System marks a folder for Archive (whose child has been archived), when the user tries to delete it without Archive Documents rights.
8. 'Object variable or With block variable not set' error when no view(tree/grid)window is open and clicking Reminders from the Tools menu.
9. When a user logs in as [Admin] and no view(tree/grid)window is open, clicking Edit menu doesn't show the text 'No operations available'.
10. The tree of the Recycle Bin does not load the folder in the sorted order (ascending order).
11. Locking of resources occur when large volume of items are to be emptied from the Recycle Bin.
12. All controls are disabled while viewing the Reminder on a Archived Folder/Document.
13. The description of the existing document, belonging to "Unkown" Document Class, changes when the property window of that document is opened and user attempting to change some other attribute of that document.
14. When "Creation Date" is used as a part of the naming expression or as an expression for the calculated attribute then system assigns the current date instead of the actual creation date of the document.
15. When the Document Naming Expression Type is changed from "PreFix" to "Full Auto" then the "First Part" field remains enabled when a user logs in as "Admin".
16. When the Document Naming Expression Type is changed the name parts (First, Second, Third), which are not applicable, will get reset/cleared when the user clicks the Sync button in the property window.
17. Error occurs when opening the Property Window immediately after changing the companies.
18. Error occurs when a user tries to open a file that is residing in the Recycle Bin.
19. System prompts for a location while trying to restore a file or a folder even when its original parent folder is still existing and live in the system.
20. System does not get updated when the Full Name remains the same as its old value but the values of the individual components of the expression have changed.
21. In administration module, User/Group Folder Accessibility, Delete permission is displayed as parent of Cut.
22. In administration module, "Must close or hide topmost modal form first" error is generated, when a user with no rights visits User/Group Folder Accessibility sections.

- 23.** When permission is assigned to a folder the system incorrectly displays that the permission is assigned to the complete tree instead of that folder.

-----**V5.1.0**-----

Enhancements / New Features:

- 1.** From v5.1.0 organiseit is **NO LONGER COMPATIBLE with SQL 2000.**

2. Archiving:

2.1. Setting up of Archive Database for each Live Database. All the databases that have been created prior to installation of this version will be flagged as Live Database. From now on whenever a database is created it will be flagged as either a Live or an Archive Database.

2.2. There can be any number of Archive Database for a given Live Database however at any given moment only one of these Archive Databases can be current. Current means the database to which the documents will be archived to.

2.3. Two New Permissions:

2.3.1. Archive Document(s)

2.3.1.1. This will allow a user to explicitly Mark a Folder/File for Archive. The user will need to specify the date of Archive. The Actual Archiving is carried out by the Archiving Service.

2.3.2. View Archive Document(s)

2.3.2.1. This will allow a user to view all the Archived Documents under a Site/Cabinet/Folder/Complete Database based on where this permission is assigned to it.

2.4. Setting up of an Archiving Rule/Expression by Document Class.

2.4.1. You can now setup any number of Archiving rules on a document class.

2.4.2. Prior to setting up of rules one needs to associate attributes to the document class and then use these attributes to specify an archiving rule.

2.4.3. Attributes of Datatype – Numeric, Character, String and Date can be used in the Archiving Expression.

2.4.4. A document will be archived when any of the specified archiving expression, of its document class, evaluates to True.

2.5. User having permission to "Archive Document(s)" can explicitly mark Folder/Files for archiving by specifying a date for archiving.

2.5.1. The User can either mark Folder/File for archive by going to the property window of that file/folder and ticking the "Archive On" field and specifying the date. The date will default to the current date.

- 2.5.2.** Alternatively the User can bring up files and/or folders in the search result and then mark them for Archive using the Search Action.
 - 2.5.2.1.** In the Search Action the User can specify the Archival Date by using any of the below three options:
 - 2.5.2.1.1.** Archive all the Selected Files and/or Folders on a Selected Date.
 - 2.5.2.1.2.** Archive all the Selected Files and/or Folders on "x" Number of Day(s) / Week(s) / Month(s) / Year(s) from "Today".
 - 2.5.2.1.3.** Archive all the Selected Files and/or Folders on "x" Number of Day(s) / Week(s) / Month(s) / Year(s) from its respective Creation Date.
- 2.5.3.** Any user who has permission to modify the property of a file/folder will be able to "Un-Mark" a file or folder that is explicitly marked for Archive. The User can un-mark only those files/folders that are explicitly marked for archive.
- 2.5.4.** Audit Entry when a file/folder is explicitly marked for archiving or un-marked from being archived.
- 2.5.5.** Ability to specify a time at which the actual Archiving Process will start daily. The Archiving Process is managed by a windows service called "oit Archiving Service".
 - 2.5.5.1.** The service runs under the context of Windows User "oitWebUser".
 - 2.5.5.2.** The service will run on the machine on which the organiseit Web-Service is installed.
 - 2.5.5.3.** The timing to start the Archiving Process can be changed by clicking HereToThere → Preferences → My Preferences → and setting the value against "Start Time" under Archiving Service and then clicking "Save Settings".
- 2.5.6.** The Archiving Process will be archive files/folders based on whichever of the following evaluates to true:
 - 2.5.6.1.** If it is explicitly marked for Archiving and the Archive Date is either the current date or a date earlier to today.
 - 2.5.6.2.** In case of files, if any of the archiving expression of its document class evaluates to true for that particular file.
- 2.5.7.** An Error Log is available to show the errors that might have occurred which prevented a file/folder from being archived. It also allows the user to clean up old error logs in case the log grows large.
- 2.5.8.** When a file/folder is archived:

- 2.5.8.1.** Its hierarchy is retained, which means it is easy to locate the file/folder. Say certain documents of a client are archived then basically the folder structure leading to those archived documents are retained.
- 2.5.8.2.** Any keywords or attributes that were associated with the document will be retained.
- 2.5.8.3.** The file will now open in "Read-Only" mode and will be accessible only if the user has the "View Archived Document(s)" permission on any of its parent folder.
- 2.5.8.4.** If a folder is archived then all its child folders and documents are archived and if there are any empty folder-hierarchy under it and those will be deleted.
- 2.5.8.5.** A "zip icon" legend will appear besides the folder when you are viewing the archived folders indicating that the particular folder has been archived.
- 2.5.8.6.** Its parent folder(s) cannot be deleted but will be marked for Archive
- 2.5.9.** A user can view the archived folders and files if it has the "View Archived Document(s)" permission on any of its parent folders.
 - 2.5.9.1.** To view Archived Documents/Folders one needs to first search on the archived documents and from there navigate to the archived folder or file.

3. Enhancement to Check-Out Procedure:

- 3.1.**A new preference is implemented for Check-Out. For those users who are using ONLY the check-out feature to check-out documents, they can do it now by just double-clicking on the document INSTEAD of right-clicking and then selecting "Check-Out".
- 3.2.**To setup this preference Goto Tools → Settings → Check-In/Check-Out and put a tick against "Check-Out Document on Double-Click". After this tick is on whenever a user double-clicks on a file and has the rights to modify the document the system will check-out the document to the default check-out folder, if already specified, else it will prompt for the check-out folder.

4. Creation of New Folders at the Time of saving a document into organiseit.

- 4.1.**Users will now be able to create new folders from the property window when they go file documents into organiseit.
- 4.2.**They can do so either by clicking the "+" icon which appears near the "Quick Find" field or by right-clicking any folder that is shown in the tree panel of the Property Window and selecting "New Folder".
- 4.3.**The System will then prompt the user to enter the Name of the Folder, the Colour and whether the foldername is to be marked as keyword.
- 4.4.**The new folder will be created under the selected folder.

- 4.5.** Any number of folders can be created in this manner till the required structure is formed and then the user can save the document in that structure.
- 5.** Change in how the system behaves when the user hits "Cancel" while saving document into organiseit.
 - 5.1.** The system will now allow the user to save the document anywhere in the system, outside organiseit and can then bring the document back into organiseit, at a later stage if required.
 - 5.2.** If the user decides NOT to Save the Document outside organiseit then the Document then it click "NO" when prompted to save the document outside organiseit.
 - 5.3.** In this way it reduces the chances of losing the documents, when not saved into organiseit.
- 6.** Copying files that are stored in organiseit to clipboard so that they are available for pasting anywhere outside organiseit.
 - 6.1.** You can now select one or more files and then right-click and Select "Send To → Copy Files to Clipboard",
 - 6.2.** Once this option is selected, you can go anywhere outside organiseit and use the Paste Option. Say E.g., you can open an email and Click the Paste option and the selected files will now be pasted as attachments to the email.
- 7.** The system now stores the width of the columns (Name, Size, Date Created, Date Last Opened) in the right hand panel (List View) so that whenever the user logs back into the system the widths stays same as it was when the user had logged out of the system.
- 8.** Wrapping of Notes Text.
 - 8.1.** Wherever in the system, Notes are displayed in a grid; the text of the Notes will now be wrapped to be shown in multiple lines so that the user does not have to increase the width of the notes column to completely view the notes.
- 9.** Optimisation in Loading of Tree:
 - 9.1.** When a user does a Quick Find in the Main Window, now only a partial tree, similar to one seen in the property window, will appear there by loading the tree faster and enabling the user to quickly carry out the searches.
 - 9.2.** When a new folder is added then instead of re-loading its parent, the newly created folder will appear un-sorted at the bottom of the list of its peers. This enables faster creation of folders in organiseit. To get the newly created folder in the proper sorted order, the user will have to select the parent folder and hit the refresh button explicitly.
- 10.** Ability to create New Attributes while trying to associate attributes to a document class.
 - 10.1.** Now the user can create new Attributes whilst they are in Attributes Association screen, if the desired attribute is not present in the list.

11. Ability to create New Domains while trying to create a New Attribute.

11.1. Now the user can create New Domains whilst they are creating new Attributes if the specified domain is not present in the list.

Bugs Fixed:

- 1.** In case of a file if multiple keywords are entered against same category, then in 'search within search' it showed same file multiple times.
- 2.** Error occurs on trying to drag & drop My Views icon to tree view.
- 3.** Error occurs when the user clicks on the "Property" button on the toolbar after closing the Search Window.
- 4.** "New" menu option appears in the context menu when a user, having Add File/Folder permissions, right-clicks on a file.
- 5.** "Cut" menu option does not appear in the Main Menu option when a user, having Move Permission, selects a folder and then clicks on the Edit Option in the Main Menu.
- 6.** In-consistent context menu options when the User, having Move Operation, right-clicks on a file in the List View and then right-clicks on a folder in the Tree View.
- 7.** "You do not have View Permission" message appears when a user having, View Permissions, right clicks on a folder and selects "View Properties".
- 8.** Improper menu options displayed under the Edit Menu of the Main Menu when no Tree View/Grid View Windows are open.
- 9.** Edit option in Main Menu does not open up when the focus is on the paperclip.
- 10.** Texts, showing the permissions in the Permission Tab of Property Window, are editable.
- 11.** Tooltip missing in the "Report" button in the Search Screen for Task.
- 12.** Application Hangs while executing Search when the same logs onto organiseit from a different machine.
- 13.** Files that are deleted and subsequently restored does not appear in the search result even though they meet the search criteria.
- 14.** When an invalid character is entered as a folder name the cursor moves to the beginning of the text.
- 15.** When an attribute that is already mapped is document is dis-associated, from the document class of that document, it does not appear in the property window of the document even though it is mapped.
- 16.** Property Pane does not show the complete name of the document class when the name exceeds 30 characters.

17. Error occurs when selecting a Deleted Document Class when multiple windows of Document Class are open.
18. Concurrency issues on Deletion of Document Class, Attributes and Domains.
19. Improper message shown when entering values against a Domain prior to creation of a Domain,
20. "Unhandled Exception" error occurs when importing an Attribute that is associated with a Domain without importing the Domain first.
21. System allowed setting the attributes to Active/In-Active in the window for "Selection of Attributes" to be imported.
22. Maintain Attribute form displayed the Domains that are deleted after the "Maintain Attribute" form is loaded.
23. Attributes whose input types were changed from Optional to Calculated were being listed while setting up the Naming Expression of that document class.
24. Error occurred while loading a tree if the User's session is killed.
25. Error occurs when the User clicks on the "Close" button while exporting the Domains / Attributes / Document Class.
26. Error occurs when the user presses "Esc" key while importing Document Class / Attributes / Domains.
27. System allows setting up the Input type of an attribute, associated with a Domain which has no values, as Mandatory.
28. Error occurs if the user clicks the "Ok" button more than once in the Search Action while folders are to be associated with a Document Class.
29. Error occurs when the user clicks on the "Delete" button of the toolbar and the cursor is focused on the Domain Values Grid.
30. Application crashes when a user enters a non-numeric value against a numeric domain in the Maintain Domain Screen.
31. Application crashes when the "Search" button is clicked with "Search within Search" criteria is set to true and the other criteria is the Document Class.

Known Limitations:

1. The Name of the Live Database appears only against its Default Archive Database and not all of its Archive Database.
2. In-consistent context menu is displayed when the user navigates from any other window to the tree window and directly right-clicks on a file or folder without proper selecting by clicking on it.

3. Error occurs when entering a very large numeric value as a criteria for a numeric attribute in the Search Screen.
4. The property window of an archived document lists all the attributes, of its document class, irrespective of whether they are mapped to that document or not.
5. A dead-lock error occurs when the user frequently refreshes the list of "Files or Folders Marked for Archive" whilst the archiving process is underway.
6. The system does not have a way to search documents on attributes that are mapped to them but are no longer associated with their document class.
7. The name of the folder missing in the error log when the system fails to archive it because one of its child file is locked.
8. "Save As" context menu is missing when the user right-clicks on an Archived File.

-----**V4.4.1**-----

Hotfix_20121201

1. Reducing the frequency to check the reminders.
2. Delaying the setting of menu options and toolbar buttons. Now the menu will be set on right-click of Files and Folders or on click of the Main Menu. This leads to increase in performance while loading the tree and navigating through the folders in the tree.

Enhancements / New Features:

1. organiseit is now compatible with Windows 2012. Refer Installation Manual for more details.
2. XML Interface with SalesforceCRM.
3. My Views:
 - a. View is a Pre-Defined or a Saved Query which the Users can use to retrieve documents and/or folders.
 - b. Each View will have a unique name that will identify the view and the name will be self-explanatory that tells what would be retrieved as the result of that query.
 - c. User can carry out all the valid operations on the file/folder that is retrieved using the View Query in the same manner it can while viewing them in the organiseit Tree.
 - d. List of System Views that are implemented:
 - My Checked-Out Documents:
 - This will list all the documents that are either checked-out by the User or are locked by the User.
 - My Recently Accessed 50 Files
 - This will list the last 50 files that were accessed by the User.
 - My Recently Created 50 Files
 - This will list the last 50 files that were created by the User.
 - My Recently Updated 50 Files

- This will list the last 50 files that were updated by the User.
 - e. My Views Panel can be shown / hidden by clicking the “My Views” button in the toolbar.
- 4. Reminders:
 - a. The system will now allow the user to setup the preferred reminder option as the default option and hence whenever User opens the Reminder Window the User’s preferred option becomes the default.
 - b. User will be able to change the default option and subsequent navigation to the Reminders window it can see the reminders as per the revised option.
 - c. When the system is upgraded and also when a new user is created any time after upgrade the default option will be “Reminders Assigned to Me” and not to include “Dismissed” reminders.
 - d. The preferred values for these options are:
 - Assigned To Me
 - Assigned By Me
 - Both (Assigned to Me and Assigned By Me)
 - All (Assigned to Anyone)
 - e. The preferred values to include “Dismissed” reminders are:
 - Not to Include
 - To Include
 - f. User can now navigate to Reminder Window by right-clicking on a File/Folder and selecting the “Reminder” menu option rather than going through the Property Window.
- 5. Preferences to set the width of the columns of the Search Result.
 - a. Users can now set the width of the columns of the Search Result. In this way they can set the columns to their desired width and they will always stay the same till the user changes it again.
- 6. Changes to the buttons in the toolbar:
 - a. Buttons Removed
 - Cut
 - Copy
 - Paste
 - Delete
 - b. Buttons Added
 - Excel
 - Outlook
 - Word
 - My Views
- 7. Changes to the XML Interface
 - a. If the documents that are to be pushed into organiseit arrives later than the XMLs then the processing of these XMLs will be put on hold and the system will periodically check if the documents have arrived, if so, the XML will be processed. The system will hold the XMLs for 24 hours. If the documents don’t arrive till 24 hours then the system will no longer process those XMLs and they will be treated as erroneous XMLs. They are Document-ID from the

Third-Party application and corresponding Document-ID of that document in organiseit.

Bugs Fixed:

1. Unable to reset User selection in an existing task before saving changes to the task.
2. "Remove Attachment" option shows up for attachment that are not yet saved to the task.
3. Error occurs when "Add Notes" option is selected on a newly attached folder that has been created by the user before attaching it to the task.
4. All the newly assigned users to an existing task get un-assigned when the user navigates to the reminder window after assigning the users.
5. Error occurs when user clicks on the Refresh button, in the toolbar, while in the Search Window.
6. Cancelled Reminders re-appear upon re-assignment. If a reminder already appears in the reminder pane and before snoozing it the user goes ahead and re-assign it to another user and then snoozes it.

-----V4.3.1-----

Enhancements / New Features:

1. organiseit is now compatible with Windows 8 (32 & 64 Bit) except RT edition. Refer Installation Manual for more details.
2. organiseit is now compatible with SQL 2012 (32 & 64 Bit) – Standard, Business Intelligence, Enterprise, Express. Refer Installation Manual for more details.
3. Task
 - a. Allows Creation of Task and assigning to one or more users.
 - b. The Flow of the Task is Creation → Assignment → Acceptance/Rejection → Work in Progress → Completion
 - c. Documents and Folders can be attached to a Task.
 - d. Each assignee can individually manage their part of the Task.
 - e. Each Assignee has to first accept the Task before it can start working on it.
 - f. Reminder alerts at various stages – Assigning of Task, Acceptance/Rejection of Task, Completion of Task. Also each Assignee can setup Reminders before Start and Due Date of the Task. These reminders will allow the Assignees to stay on top of their task and manage them in effective manner.
 - g. Notes can be added to the attachment of the tasks, which can be viewed from the Task as well as from individual attachments.
 - h. Full Audit Trail on the Task.
 - i. Owner can assign additional users at any stage of the Task.
 - j. Owner can complete the task on behalf of the assignee.
 - k. One can Search for a Task based on criteria like – Assigned to a User, Created by a User, Status, Start Date, Due Date etc.

- I. One can also search for a task for a client by Searching for all Tasks under a Client's folder.
4. Favourites
 - a. One can add frequently referred Documents & Folders to its Favourite List.
 - b. Once a Document or a Folder is marked as Favourite, it will appear in the Favourite List and the user can manage that Document or Folder from that list.
 - c. If a User a wants to remove a Folder or a Document from its Favourite list, it can do by right-clicking on that Folder or the Document and selected "Remove from Favourite".
 5. Reminders
 - a. A Filter is now available in the Reminder to enable the user to view Reminders:
 - Assigned by it
 - Assigned to it
 - Both (i.e., Assigned by it and Assigned to it)
 - All (All reminders irrespective of who has created it or to whom it has been assigned to)
 - The User will also be able to show/hide Completed Reminders
 - b. Ability to Re-assign Reminders:
 - From the Reminder window a Creator/Owner of a reminder can now re-assign an existing reminder to a different user. In this case the existing reminder will be dismissed and new reminders, assigned to the new user, will be created in its place.
 - c. Reminders for Task:
 - organiseit will now allow the Assignees of the Task to setup reminders against the Start and Due Dates of the Task.
 - System will also generate reminders, which will work as Notifications,
 - Assignee will receive a reminder when a Task is Assigned to it
 - Owner will receive a reminder when a Task is Accepted or Rejected by the Assignee
 - Owner will receive a reminder when a Task is completed by the Assignee
 - d. General Reminders – One can now setup a general reminder. This reminder is not associated with any File or a Folder. This could be use when a user wants to setup a reminder for some adhoc task.
 6. Recycle Bin for User
 - a. Now users can manage their own Recycle Bin. They will be able to Restore/Empty the items that they have deleted.
 - b. Admin will be able manage items deleted by all users.
 7. Paste Special – This will allow the user to copy and Paste the folder hierarchy only (and not the Documents contain within that hierarchy). This will be particularly useful to those users who would like to file documents by year and each year they would like to have the folder structure from the previous year.

8. You can now drag Emails directly out from Outlook and drop it into organiseit. You can use this feature instead of using the Add-in Button. The emails will be saved by their Subject Line. If you want to save a bunch of emails into a particular folder of organiseit and want to save it by their subject line then dragging those mails out of Outlook and dropping them into organiseit is the fast way of saving those emails.
9. One can now start/invoke Excel, Word and Outlook from organiseit. In the Menu you will find a menu item MS Office which has a link to Excel, Word and Outlook.
10. One can now generate a Note on a File/Folder without having to go through the Property Window. Right-Click on the File/Folder and the option for creating the Note can be found there.
11. XML Based Interface with Third-Party Application RiskConsole enabled.
12. Enhancement in XML Interface for iBAIS application to include new elements and also Pushing of Documents using the same Schema used for creation of Folders and Keywords.
13. Enhancement in XML Interface for Third-Party Application whereby they can use a single XML schema for Creation of Folders, Keywords as well as Pushing of Documents into organiseit.
14. Organiseit will now generate an output XML for each corresponding XML from third-party application through which it pushes the document into organiseit. The output XML will contain 2 elements – Document Handle as specified by the third-party application and the corresponding DocID for that document as in organiseit.
15. Option for Property Window in the Search Screen. The user will now be able to open the Property Window by right-clicking the Search Result and selecting the "Property" option.
16. A new Tab has been added in the Property Window which will list the Permissions that the User has on that Folder/File.
17. oitStartup and HereToThere Merged:
 - a. HereToThere is now merged with oitStartup.
 - b. In the systray instead of 2 icons you will now see only one, that of, PaperClip.
 - c. All other features of HereToThere will remain the same.
 - d. You will be able to change the hotkeys by right-clicking the Paperclip and selecting "Preferences".
 - e. Another default Hot Key added for Quick Find.
 - So now you have 2 hot keys to invoke search from any other application.
 - CTRL + F12 – For Search using HereToThere, i.e., the selected text will be treated as keyword and the system will search for files and folders in organiseit to which the user has access to and has the selected text tagged as keyword. Here the system navigates to the Search Screen.
 - CTRL + F11 – For Search using Quick Find, i.e., the selected text will be treated as a Folder Name and the system will Search for the

folder(s) to which the user has access to and has the name same as or starting with the selected text. Here the system will navigate to the Tree View and bring up the first folder that matches the criteria.

-----V4.2.1-----

Enhancements / New Features:

1. Creation of Reminders on Documents and Folders.
 - a. Allows users to setup Reminders on Documents and Folders.
 - b. Reminders can be setup for self or for other users.
 - c. Allows setting up reminders by specifying a particular datetime or lets system calculate the datetime based on the User Input (of Minutes, Hour, Days, Week, Month, Year). A text field allows the user to key in a notes/text for the reminder.
 - d. Allows snoozing of reminders to a pre-set time / custom time.
 - e. Allows navigating to a folder or opens a document on which the reminder is set from the reminder pane/window by double-clicking the reminder item.
 - f. A separate pane for the reminder appears as and when a reminder is due.
 - g. Reminder History of a user can be viewed from Tools → Reminder. These show all Reminders — ones that are due and also the ones that are completed.
 - h. A folder in organiseit can now behave similar to a "Task" in Microsoft Outlook. You can setup a folder in organiseit and add documents to that folder (as you add attachments to a Task) and a reminder can be set on the folder.
 - i. A "Bell" icon appears against a File/Folder item whenever a Reminder is set against it.

2. Creation of Notes on Documents and Folders.
 - a. Allows users to add notes on Documents and Folders.
 - b. These notes will stay as internal notes and will not attach to the Document or Folder when it is exported out of the system.
 - c. Any number of notes can be added to a Document or a Folder.
 - d. For the purpose of Audit Trail the system records the Date and Time and the ID of the User who has created the note.
 - e. All the notes against a Document or a Folder can be quickly reviewed directly from the Property Pane.
 - f. For Audit Trail Purpose a note once created cannot be modified or deleted.
 - g. A "Post-it" icon appears against a File/Folder item after a "Note" is added to it.

3. Office Add-ins
 - a. Support for Office 2010, 64 Bit.
 - b. Users can now save attachments of an email directly into organiseit. In the earlier version if a User wants to save attachments of an email, one had to either save the attachments first on the local/network drive and then push those documents to organiseit or alternatively save the mail along with the attachment into organiseit. With this new feature the User can now select one or more than one email in Outlook and click the "Save Attachment" button in

the organiseit toolbar/ Ribbon and organiseit will then extract the attachments out of the Email and enable saving those into organiseit.

- c. Users can now send emails to organiseit as soon as they click the "Send" button in Outlook. Once the email is successfully sent Outlook will push the email to organiseit which will enable the user to save the email into organiseit. The user has the option to Switch On/Off this feature by selecting the appropriate option in the drop-down list that is now available in the organiseit toolbar/Ribbon in Outlook.

4. Setup (Installation Program)

- a. Setting "Password Never Expires" property on "oitWebUser" Account.
- b. "Synchronise with Active Directory" – This feature is applicable when the Setup Environment is selected as "Domain Controller".
 - Synchronise with Active Directory set to "Yes" – The setup program will go ahead with Creation of oitWebUser Account and oitDmnGroup Group in the Active Directory, if they do not Exist. If the oitWebUser Account exists then the password will be reset to the password specified in the password field the "Password Never Expires" property is set to "True/Yes".
 - Synchronise with Active Directory set to "No" – The setup program will not update the Active Directory. This option can be used when the User does not have permissions to Write to the Active Directory. The User has to make sure of the following:
 - oitWebUser account is created,
 - the "Password Never Expires" is set to "True/Yes"
 - the Password is known (this will be required at the later stage of installation),
 - the oitDmnGroup is created

If any of the above is not taken care of the installation will fail. Please note that the User **HAS to be AWARE** of oitWebUser Account's **PASSWORD** as it will be needed during the Installation of the Web Service.

Feature(s) NO LONGER AVAILABLE

1. Office Add-ins: All Previous versions of Add-ins are no longer supported from v4.2.x onwards.
2. The organiseit PDF Button no longer available in Outlook. (If the button appears it is because of the toolbar from previous version of Add-ins.)

Platform(s) NO LONG SUPPORTED

1. Microsoft Office 2000 and 2002 (Office XP) are no longer supported from v4.2.x onwards.

Platform(s) Pre-Requisite for Office 2010 (64 Bit)

1. .NET Framework 4.0 and above.

Known ISSUES:

- I. If error occurs on using organiseit Add-ins in Word / Excel / Outlook after upgrading to 4.2.1 or above from versions earlier to 4.2.1, it could be because of Add-ins referring to the older version of add-in.

Workaround:

Delete the "organiseit" add-in toolbar and close the Office Application (Word / Excel / Outlook) and re-open. You will then see the toolbar re-appear. This toolbar now points to the new Add-ins.

The deletion of toolbar cannot be automated because the information is stored along with other settings of the User for Word / Excel / Outlook.

Bugs Fixed:

1. organiseit Main:

- 1.1. In Search Window, audit log entry is posted for a Find & Replace action on a given file/folder, even though the selected files/folder in the Search result does not match with the given "Find" criteria.
- 1.2. In Search Window, shortcut key "Alt+A" is assigned to 3 different controls -- "Administration" menu, "Actions button & "Reset" button.
- 1.3. In Search Window, same Tooltip message "Click for Actions" is set for 2 different buttons -- "Actions" & "Reset".
- 1.4. User is able to attach an in-active Category or Keyword, by typing the Category or Keyword in the respective field (instead of selecting from the list).
- 1.5. User is unable to detach an Inactive Category or Keyword from a file/folder.
- 1.6. Error "Either BOF or EOF is true ..." occurs on entering a letter in Search text-box in the Company List dialog (File → Select Company ...) when the list is empty. (All the existing companies have been made in-active after the user has logged into the Main Module).
- 1.7. Error "Invalid Index value was passed in" occurs on trying to restore documents, whose parent folder is also deleted, from Recycle Bin using the "Restore" option in the Context Menu.
- 1.8. Error "Subscript out of range" occurs on clicking a folder, immediately after a file is closed.
- 1.9. During a Copy and paste operation, the destination folder not getting refreshed automatically if the system encounters a duplicate file at the destination and flashes the "File Already Exists" message.
- 1.10. A non-Admin User unable to attach Keyword & Category while creating a new folder.
- 1.11. System Freezes when a User who does not have rights for all these operations – "Cut", "Copy", "Paste", "Delete" ; on a given folder tries to access the "Edit" Menu using the shortcut key Alt+E.
- 1.12. Error "Element not found" occurs, if a User tries to add a file under a folder which is already deleted.
- 1.13. Error "Invalid procedure call or argument" occurs when new file is deleted (from the Hard Drive) before getting saved into organiseit.
- 1.14. Error "Object variable or With block variable not set" occurs while trying any operation on the files and folders, that were successfully added to organiseit, when a process of dragging and dropping of external files is aborted mid-way.

2. oitNew

- 2.1. Error occurs when an attribute, which is associated with a Domain, is being imported.
- 2.2. System allows setting an attribute, of the Source Company, Active or In-active from the Import Wizard Screen.
- 2.3. Error occurs while trying to mark an Attribute In-Active.
- 2.4. Error occurs when User clicks on a node in a Tree View after its Session is killed.
- 2.5. Error occurs while trying to save a New Attribute, which is associated with a Domain, if the referred Domain has been deleted by another User.
- 2.6. Error occurs when a User clicks on the Colum Header of “Active” column.
- 2.7. In the Domain Screen, the last row appears to be deleted when the User is in “Add” mode and clicks the “Delete” button on the toolbar. The row in-fact is not deleted but dis-appears from the screen.
- 2.8. Error occurs when the User presses “Esc” key while the Domains are getting imported.
- 2.9. Error occurs while navigating, by pressing SHIFT+TAB, between Domain Window and other open Windows of the application.
- 2.10. Application Terminates while trying to save an Attribute, which is associated with a Domain, if the datatype of that Domain has been modified by some other User/Session.
- 2.11. System allows the User to mark “Unknown” document as In-Active. (This is a System Document Class and cannot be made In-Active.)
- 2.12. Error occurs while trying to save changes to a Document Class / Domain / Attribute that has been deleted by another User or Session.
- 2.13. Error occurs while saving changes when Single Quote / Apostrophe (‘) is part of the text data.
- 2.14. Error Occurs when the User presses the “Esc” key while associating attributes to a Document Class.

-----V4.1.3-----

Bug Fixed:

1. In Property Window, File Description not getting refreshed/synchronized as per the naming expression while changing the Document Class.
2. In Property Window, while editing the values of a attribute that is associated with a Domain, the system does not automatically select/highlight the current value from the List of Values that are available.
3. System not recording the “Last Updated” date of a document. (The information was however available in the Audit Log of that document.)

Enhancements / New Features:

1. When a document opened from organiseit is closed the system will now select/highlight that document in the Tree and Grid View instead of selecting/highlighting the first document in the list.
2. When a document is copied within organiseit, then the Document Class and attributes, if any attached, of the original document will also be associated with the newly created document.
3. Push Technology for Creation of Folders and Keywords – During the process of Folder creation if the system finds that a folder by that name already exists it will then associate that folder with the current push under following conditions:

- c. The already existing folder is NOT Associated with any other PUSH in the same organiseit database.
- d. The folder was earlier associated with the same entity and was then de-linked.

-----**V4.1.2 (HOTFIX 20110124)**-----

Bug Fixed:

1. Error Number: 3021.
Error Description: Either BOF or EOF is True, or the current record has been deleted. Requested operation requires a current record.....
This error occurs, when user selects "Process on all" option and then carries out "Check-Out" or "Send-To" operation and on completion of the operation clicks on search action button.
2. Error Number: 41501.
Error Description: Invalid Index value was passed in.....
This error occurs when multiple files are selected for "Check-Out" and one or more of the selected file already exists in path to where the files are being checked out. The system will first warn the user about the existence of the file and then displays this error.
3. The functioning of browse button to select the folder during check-out as well as check-in process handled properly.
4. Error Number: 9.
Error Description: Subscript out of range.
This error occurs when user using the right mouse button double clicks in the "White Space" area of the grid view and the top row in that view is a document (and not folder).
5. System allowed non-numeric value in numeric attributes by using the Copy-Paste option and then saving the value.
6. Enabled viewing of audit log both in the tree as well as grid in the Recycle Bin window.
7. Error occurred while creating Company Database on SQL 2008.

New Features:

1. User can now Check-Out files from the Search Result Window by selecting the documents in Search Result.

-----**V4.1.2**-----

Bug Fixed:

1. Error occurs during Quick Find in a partially loaded tree when a folder in that tree is created in another user's session.
2. Unable to assign a correct version number to image file when its description has special characters.

3. Error occurs when a user has no active permissions and clicks on the column header in the Parent Grid (in Grid View).
4. In the Tree View mode when the user clicks on a row in the grid there is a delay before the selected row gets highlighted. However if the user clicks on the Selector button the row gets highlighted immediately.
5. In Grid View, when the user uses the down arrow key to navigate between the rows in the parent grid the child grid does not get populated.
6. Ctrl-X deletes the node from the Tree in – Recycle Bin, Templates Window, Property Window, Restore To ... Window, Compare and Move Window, Folder Lookup Window (Search Location) in the Search Window.
7. Issue with Context Menu in Tree Control in Recycle Bin.
8. Error occurs when the LogReport folder is missing while generating the Audit Log Report.
9. Issue with changing Password when there is an apostrophe (') in the Password.
10. The Quick Find Criteria text box, in Property Window, allowed more than 255 characters leading to incorrect results.
11. In the Search Window, the Search criteria text box for Folder/File Description and Keyword allowed more than 255 characters leading to incorrect results.
12. System allowed the users to attach Inactive Keywords and Categories by typing the same instead of selecting from the list.
13. System allowed invalid characters to be typed in for the filename for "Export File List" Report.
14. Rolled Back – The Session Environment settings. These settings were introduced in 4.0.x.
15. System unable to reset License count if an error occurs in the main application during the "Login" Process leading to "License Exceeded" error after multiple attempts.
16. The contents of the Recycle Bin will no longer be loaded automatically when the Window is opened so that the Window loads faster.
17. Import Wizard: Unable to configure/re-instate pulls when the source database is on the different server.

New Features:

2. Incorporated the changes to the XML Schema for BAIS. New element "Executive" is added to the schema.
3. Incorporated changes (in the PUSH Technology) to conditionally execute a "Reaction" when an "Action" occurs in the Third-Party application by specifying a "PreExecute" condition.
4. On closing the Property Window after successfully saving a new document to a folder, in organiseit, the system will navigate to the said folder.
5. Multiple items can now be selected for Restore.
6. Fetch all Button in Keyword and Category Lookup Window to load all active Keywords (against the selected Category) and Categories respectively.

-----**V4.1.1 (HOTFIX 20100908)**-----

Bug Fixed:

1. PDF Printer can now be installed on 64 Bit Edition of Windows 7.
2. Fix – When ever the user goes to add a document into organiseit the application window maximizes irrespective of its previous state.

-----**V4.1.1 (HOTFIX 20100820)**-----

Bug Fixed:

1. The splitter bar in the tree view moves to the rightmost part of the screen every time the user logs in to the application.
2. "Invalid Property Value" – Error when the splitter is moved to the right most part of the screen in tree view and the Property Pane is open.
3. When the user opens a document from the Search Result the document window goes behind organiseit application window.
4. User was allowed the Cut Operation with keyboard shortcut Ctrl+X.
5. The system did not allow the deletion of the very first file added to the organiseit database.
6. After the DeLink operation the user had to close and re-open the Property Windows to be able to make changes to folder description.

-----**V4.1.1**-----

Bug Fixed:

1. User unable to open a file, which is locked by another user, in Read-Only Mode by double clicking the file.
2. "Save File in this Format ..." setting ignored in Word & Excel by the Add-in button when importing a Un-Saved file into organisiet. This used to cause the file to be saved with ".docx" and ".xlsx" extensions resulting into an error while opening the files after importing into organiseit. (Fix available in 20100525 Hotfix).
3. Unavailable to save an Excel file using the Addin Button. (Fix available in 20100525 Hotfix).
4. "Index out of Range" error when using SubString Function in the Document Naming Expression.

New Features:

7. Incorporated the changes to the XML Schema for BAIS. New element "Division" is added to the schema.
8. Incorporated the changes to the XML Schema for FigTree. New element "IncidentDate" is added to the schema.

-----**V4.1.0**-----

Bug Fixed:

1. Error Number: 35601. Element Not Found. – Error when trying to open a folder in Tree/Grid View.

2. Error Number: 384. A form can't be moved or sized while minimized or maximized. – Error when trying to navigating to the Search Form.
3. Error Number: 91. Object Variable or With block variable not set. – Error while trying to scan documents into organiseit database.
4. Error Number: -2147467259. Transaction was deadlocked on lock resources with another process and has been chosen as the deadlock victim. Rerun the Transaction. – Error while trying to load the contents of a folder while trying to save a new document into that folder in organiseit database.
5. Error Number: -2147217873. – Error while trying to attach a new Category/Keyword to a document in organiseit database.
6. Error Number: -2147418113. Automation Error Catastrophic Error.
7. Under certain circumstances organiseit allowed files with duplicate description to be saved into organiseit.
8. Under certain circumstances organiseit allowed folders with duplicate names to be created into organiseit.
9. Error Number 401. Can't show non-modal form when modal form is displayed. – Error while trying to save a new document into organiseit.
10. Error Number: -2147216306. "Error information was lost ..."
 - a. Error while trying to save a document into organiseit.
 - b. Error while trying to open a document from organiseit.
11. Unable to show icons for some of the documents.
12. Unable to resolve short-names for the files when opening a document from organiseit.
13. When a user cancels the operation to add a document to organiseit it re-appears when the user subsequently goes to add another document to organiseit.

Known Issues:

1. Error Number: 58. File Already Exists. – Error while trying to insert a document into organiseit by using the Office Add-in. (Workaround: Close organiseit application and delete all files from "My Documents\MyOrganiseit\SendTo" folder.)
2. Error Number: 94. Invalid use of Null. – Error while trying to open a folder in organiseit. (Workaround: Contact Organise IT Support Team).
3. Error Number: 7. Out of Memory. Error – while trying to load the files and folders in Tree/Grid View. (Workaround: Replace MSCOMCTL.OCX file on your system).

New Features (4.1.0 Release 2):

1. When the user opens a folder/file from the Search Screen the system will now open up in the Default View of the User (i.e., Tree View if Tree View is the Default View or else Grid View if Grid View is the Default View).
2. When a file that is opened from organiseit is closed the system will automatically refresh the Tree and Grid Views to show that the files are now un-locked. Earlier the User had to either click the folder on which the file was or click the refresh button to verify whether the lock has been removed.

3. **(BUG FIX)** When a file opened from organiseit is modified but the User does not want to save the changes to organiseit then the file stays locked.
4. Slow connections to SQL Server and speed issues. Performance Optimisation and Connection Pooling used to overcome this issue in certain areas.
5. The add-in in Word and Excel ignored the setting "File→ Options→ Save → "Save file in this format ...". The fix now takes this into consideration. This is applicable only to the New Files (Un-saved files) and not to the files that already exist in organiseit or on the network.
6. **(BUG FIX)** In the oitNew Module when you search for Folder on name and the Criteria for the "Containing" option is left blank it brings ONLY those folders having a Space in the name instead of bringing all the folders.

New Features:

1. Remote Application enabled for Windows 2008 Terminal Server. (i.e., you can now publish organiseit modules on Windows 2008 TS.)
2. A complete new look.
3. Ability to keep both the Tree View and Grid View opened and switch between the views without it getting closed.
4. Ability to Open up multiple Windows for Tree View and Grid View which means ability to work on more than one folder at time.
5. Ability to drag-and-drop folder(s) and/or file(s) from one window (Tree/Grid View) to another window (Tree/Grid View).
6. Modified Menu Options.
7. New Folder Colours – Orange, Purple, Brown.
8. New Property Pane – View the properties of Folder / File without opening the Property Window.
9. Filing of Documents into organiseit has now become much easier.
10. Better Error Reporting – Ability to copy the Error Log onto the Clipboard to send it to the Organise IT Support Team.
11. New and Improved Search Screen.
12. Additional Search Criteria.
13. New Search Actions – Ability to Add new folders, Mark Folder as Keywords, "Send To" option.
14. Legends for – Keyworded Files, Locked Files and Checked-Out Files.
15. Creation of Document Classes.
16. Creation of Attributes.
17. Creation of Domains for Attributes to enable selection from Pre-Defined Values.
18. Ability to specify a naming convention for the Documents of a particular Document Class by specifying a Expression. The expression can be for a Prefix, Suffix or for the complete name.
19. Ability to specify pre-defined functions and/or attributes in the expression for document name.
20. Ability to associate Attribute with a Document Class. When a attribute is associated with a Document Class it can be specified whether the said attribute is a Optional Attribute or a Mandatory Attribute or a Calculated Attribute. Also once a attribute is associated with a Document Class it can be used in the naming expression.
21. Ability to associate a Document Class with a Folder in organiseit.

22. Improved Property Window:
 - e. Ability to select a destination folder from the property window itself.
 - f. Selection of Document Class for the Document.
 - g. Automatic Generation of Document Name (Prefix or Suffix or Complete Name), if an expression is specified for the selected Document Class.
 - h. More details about File/Folder displayed.
 - i. Ability to capture the values of the attributes associated with the selected Document Class.
 - j. Automatically evaluating the values of a Calculated Attribute.
 - k. Enhanced Keyword Tabs.
 - l. Much easier to tag a keyword.
 - m. Much easier to lookup for a category or keyword.
 - n. Ability to sort on Category or Keyword (for Imported Keywords).
23. Now the user can set the value of "ForegroundLockTimeout" registry key from the application instead of manually editing the registry.
24. The default format of the Word Document when organiseit add-in is used in Word 2007 will now be "docx" instead of "doc".
25. If the template structure that is being used in Push/Pull is modified, it will no longer have an impact on the folders that are already created. For making changes to the existing folders, the Search – Action option is to be used to make appropriate modifications.
26. Cannot move or delete the folders that are Linked with Third-Party applications without De-Linking them.
27. Folders that are manually created with not get automatically linked with Third-Party application. Only those folders that are created through the Push/Pull process will be linked.
28. Enhanced Grid View – All operations on Files and Folders now possible (except dragging and dropping within the same window).
29. XML based Interface for Pushing Documents into organiseit.
30. "Revoke All" button now provided in the "Folder Accessibility" and "Group Accessibility" form to revoke all operations from the selected folder for the selected user.

V3.5.1

Bug Fixed:

1. Unable to setup the XML Interface if multiple PUSHs are setup from the same Database of a Third-Party Application.
2. While trying to drop in files into organiseit the Paper Icon changes to that of a Filing Cabinet or a Folder while moving the mouse along the tree.
3. Timeout Errors while deleting, purging or bulk moving data.

New Features:

1. Windows 7 Support enabled. Editions Supported – Professional, Ultimate and Enterprise (32 Bit).

V3.4.1

Bug Fixed:

1. Unable to Create SSIS Package on SQL 2008.
2. In event of error organiseit not displaying the correct error message.
3. Timeout Errors while inserting Large Templates.
4. Property Windows showing wrong information after an attempt to drop the files on the top-most folder in organiseit tree (Paperclip).
5. "New File" menu stays disabled after the User cancels the moving of folders from one location to another in organiseit.
6. System allows inserting a File directly under a Filing Cabinet after random drag-and-drop operations are carried out.
7. System returns error while entering invalid characters in the File Type Criteria in the Search Window.
8. System allows storing of files with duplicate description after adding an Email where the subject line has all invalid characters (invalid as per organiseit).
9. Property Window not showing correct information after a Image File is edited and saved back to organiseit after opening from Grid View.
10. "Element Not Found" error when clicking on the "Cut" button in the toolbar after carrying out a Drag-and-Drop operation.
11. System shows wrong icon in the List View on clicking the "Refresh" button in the toolbar after Drag-and-Drop operation.
12. "Invalid Procedure Call" error when the system is trying to save an Image file that is edited while the Property Window of another file is still open.

New Features:

1. XML Based Interface with Ebix's "WinBEAT" application enabled.
2. XML Based Interface to Import Files into organiseit enabled. Third-Party applications can now push documents into organiseit by generating and XML and specifying the details of the document into the XML.

-----**V3.3.4**-----

Bug Fixed:

1. Audit Entries (for file creation) not generated randomly when files are dropped into organiseit.
2. Unable to create SSIS Package when setting up the Pulls with third-party application due to table names in organiseit appearing in mixed cases.
3. organiseit not rolling back data in event of errors.

New Features:

1. Files sent from Word, Excel and Outlook will have the numbers preceding the filenames instead of succeeding. So the users don't have to rename the files if they fail to drop them in organiseit.

-----**V3.3.3**-----

Bug Fixed:

1. Deletion of files from a non-organiseit Work directory on user's hard-drive.
2. Unable to save modified File Description or Attach New Keywords to a new file once the User has Opened and Closed a file from organiseit.

3. Property Window appears only once even when multiple files are sent from Outlook using organiseit Office-Addin.

New Features:

1. XML based interface for Figtree Application.

-----**V3.3.2**-----

Bug Fixed:

1. Time-Out Error while Purging.

New Features:

1. SQL 2008 Support
2. De-Link Operation can be now carried out on Search Results
3. Users can now configure whether they want to extract the files by File Name or by File ID
4. Users can configure the default path to extract files out of organiseit for viewing and editing.
5. Import Wizard enhanced to support creation of SSIS Packages on SQL 2008
6. Support for Silent Installation of Client Components

-----**V3.3.1**-----

Bug Fixed:

1. Find & Replace did not allow Space Character as a replacement Character.

New Features:

1. New Push Interface (Rule Based Interface)
2. Re-Starting of Monitoring Service Daily at a Scheduled Time. The monitoring service is unable to monitor network folders after network disruption as Windows OS loses the information. A new feature has been introduced that will restart the service daily at a scheduled time (default being 23.55 Hrs) so that in an event of Network Disruption the processing will be delayed at the most by a day.

-----**V3.2.1**-----

Bug Fixed:

1. Error while changing the view (From Grid View to Tree View) when files are opened by a user while in Grid View.
2. "Invalid Procedure Call" Error.
3. "File Not Found" or "Permission Denied File" Error when the User tries to save changes to a file opened from organiseit or when a User tries to bring in a New File from Paperport.
4. PDF Printer prints blank pages.
5. Import Wizard Modified to create SQL 2000 type Packages on SQL 2005 as SQL 2005 Workgroup Edition does not have a full support for SSIS.

6. Restart Time added to Monitoring Service. This feature will automatically restart the service once a day at the scheduled time. The restart will cause the service to start monitoring the network folders, if any, that are configured. Earlier a network failure would break the monitoring of folders and a restart of the service was required.
7. "Session Killed" message appearing when a User tries to Login.
8. When the Web Service is not available the User will get an error while trying to login into the Main Module but the Program does not terminate or allow the User to re-login till the User kills the Process from the Task Manager.
9. When the organiseit PDF Printer prepares a PDF document sends the control to the Main Module the focus does not come on the application, the user has to manually maximize the window from the Task Bar.
10. While in Grid View the System used to allow creation of files under a Site.
11. Error when a User closes a file opened from organiseit and re-opens it immediately.
12. In Tree View the System allowed moving files that are Locked Using the "Drag and Drop" method.
13. While in Grid View, invoking for HereToThere does not open the Search Screen.
14. Error while trying to Delete Folder using the Search Actions.
15. Error while Purging Files and Folders
16. In Grid View the System allowed creation of Filing Cabinet under another Filing Cabinet.
17. In Grid view adhoc errors while trying to create folders.
18. In Grid View the System allowed creation of Folder under a Site.
19. Error while trying to Insert Template that are deleted.
20. New Templates that are created are not visible till the User logs out and logs back in.
21. Menu items not getting enabled when the focus is moved from Folder to a File and vice versa. One had to refresh the parent folder.
22. Audit Entries for Copy and "Restore from Recycle Bin" actions not correct.
23. Error while switching views after the User's permissions have been changed while the User is still logged on.
24. In certain situations the User is allowed to view the Property of file and folder even though the user does not have the rights for the same.
25. In Grid View the System did not allow changing the name of the folder after navigating to it through Quick Find function.
26. In certain situation the Toolbar button to create New File/Folder gets disabled even though the user has rights to create files and folder.
27. In certain situations while adding files to organiseit a second instance of the application opens up.

Operating Systems Supported:

Servers: Windows 2000 (SP4), Windows 2003 (32 bit and 64 Bit), Windows 2008 (32 bit and 64 bit)

Workstations: XP Professional (SP2 and above), Windows Vista Business, Windows Vista Premium, Windows 2000 Professional (SP4)

Terminal Services – Windows 2000 Server, Windows 2003 Server (32 bit and 64 bit)
organiseit is now 64 bit compliant (x64 Edition)

Microsoft SQL Server Editions Supported:

SQL 2000, SP4 — Enterprise, Standard, Personal, Desktop

SQL 2005 SP2 — Enterprise, Standard, Workgroup

New Features:

1. Installation Made Simpler with default values
2. User can now carry out actions such as — Cut & Paste, Copy & Paste, Send-To, Delete, Search (including Search from Here), Save As, Insert Template from the Grid View.
3. The User now has option to sort the folders and files on either Date or Names.
4. Check-Out, Check-In feature. This feature will allow users to edit documents stored in organiseit in an off-line mode and then save the modified document back into organiseit.

-----V3.1.1-----

Bug Fixed:

1. Error fixed while loading list view/grid when the creation dates is missing.
2. Search Facility on Dates.
3. "Invalid Procedure Call" Error.
4. When a new file is added to organiseit database it retains the file extension in the name and when it is exported out of the database, the extension now appears twice.
5. Mouse Pointer set on list view while inserting file through Buttons in Office Application or through the Send To option.
6. Log file path displayed in message while creating log file. (Audit log / Search Action error log)
7. Permission Denied error while trying to add files into organiseit.
8. Nothing options replaced with "cancel" button in next step wizard window in administration module.
9. Changes made to make application 64-bit OS compliant (reading values from registry during login).
10. On terminal services when the users try to attach a keyword to a document when it is brought into the database the keyword does not get attached.
11. Sorting of files in list view.
12. Access Denied or Permission Denied when opening files from organiseit.

13. Unable to open files having special characters. (From v3.1.1 organiseit restricts user from naming files using special characters - \ / : * ? " < > |

Operating Systems Supported:

Servers: Windows 2000 (SP4), Windows 2003 (32 bit and 64 Bit)

Workstations: XP Professional (SP2 and above), Windows Vista Business, Windows Vista Premium, Windows 2000 Professional (SP4)

Terminal Services – Windows 2000 Server, Windows 2003 Server (32 bit and 64 bit)
organiseit is now 64 bit compliant (x64 Edition)

1 organiseit Main Module:

1.1 Facility to Scan Documents – right click on the folder in organiseit into which you would like to scan the document, you will have options called "Select Source" and "Acquire". Any user who has the rights to add a file into folder in organiseit would see this option.

1.1.1. Select Source – would allow the user to select a scanner and

1.1.2. Acquire – would allow the user to scan a document into that organiseit folder.

1.2 Purge Facility – Will allow organiseit support staff to purge the dead documents out of organiseit database thereby freeing up the space in the database.

1.3 Grid View – This will allow the user also to work on a view which is different from the classical tree view. Click on the tool bar View → Grid View. You can also set this view as default view so that next time the user logs onto the organiseit, he/she would see the grid view instead of the tree view. To make a view a Default view click on the Toolbar View → Set Default View.

This view has two panes. The upper pane will show the parent folders and the lower pane will show the sub-folders and the files in the folder. To go to the next level in the folder hierarchy click on the Site/Cabinet/Folder in the lower pane and it will bring up the next level in the lower pane.

The quick find function is faster in this view and overcomes the refreshing issue that the tree view has. When a quick find is done on a folder, all the folders that match the criteria is listed in the top pane. Along with the folder name the path of that folder is also listed to enable the user to visualize where actually the folder lies in the hierarchy.

The users will be able to scan files, open files, change properties of files and folder from this view.

1.4 Search Features:

1.4.1. Search from Here: By default organiseit searches for a file or a folder in the complete database, at times the user is aware on which portion of the hierarchy he/she wants to search from. Under such circumstances, the user can right-click on the folder under which it wants organiseit to search and use the "Search from Here" option. Once this option is selected the search will be then done on the files and folders under the selected folder.

1.4.2. The Search has now Advanced Search:

1.4.2.1. Search files created by a user on certain date ranges

- 1.4.2.2. Search for empty folders
- 1.4.2.3. Search for files uploaded by user
- 1.4.2.4. Show whether keywords are attached to files (to enable the user to find out files that are not tagged)
- 1.4.2.5. Search for a specific file types like – DOC, PDF, MSG, JPEG files etc
- 1.4.3. Search actions
 - 1.4.3.1. Carry out bulk actions on the search results i.e., when a users searches for a file or a folder on a specific condition and the system returns with a list of files and folders matching that criteria then the user can carry out certain set of actions on this list. The actions that can be carried out are:
 - 1.4.3.1.1. Change Description (of files and folders)
 - 1.4.3.1.2. Delete (files and folders)
 - 1.4.3.1.3. Attach new keyword (to files and folders)
 - 1.4.3.1.4. Detach keyword (from files and folders)
 - 1.4.3.1.5. Change folder colour (of folders)
 - 1.4.3.1.6. Find and Replace(to files and folders)
- 1.4.4. Search within search – This feature facilitates user to search file(s)/folder(s) by Name/Keyword/Date within searched result.
- 1.5 Generates a report for the Audit Log in an Excel file. The machine on which this report will be generated should have Excel installed on it.
- 1.6 Bulk Moving of Folders – When setting up a new organiseit site, a typical scenario will be that the database will have two filing cabinets, one which has the new data with the AtoZ list and the other which has the old documents that the user has created/scanned till date. Now if the users would like to move the old files to the respective client folders in the filing cabinet then they use the Bulk Move Feature. This feature will only be available if a user logs in as “admin”.
- 1.7 In the previous version whenever a document is opened the user use to see a file number when you open a word document it appears as 100.doc etc. In the new version the user will be able to see the document as it is named in organiseit. Say the document is named as “20080301 RNL Letter” then it will show up as “20080301 RNL Letter” instead of 100.doc.
- 1.8 Bulk Find and Replace: - helps to change the file or folder name in bulk. For example, files or folders having the common letters (say “T/B/A”) in their name can be replaced by (“TBA”) using this feature.
- 1.9 Special characters are restricted in file description and folder name.

2 Push Technology

- 2.1 Organiseit can now interface with third-party applications that can send XML files to organiseit.

3 Data file Monitoring

- 3.1 Organiseit can now allow users to configure certain folders on their hard drive to be monitored in a way that any document that gets dropped into that folder will automatically be grabbed by organiseit and stored in a mapped folder in organiseit. The configuration module does the mapping.

4 Enhancements for SQL 2005

- 4.1 The Pull technology is enhanced to run in the optimized manner in SQL 2005.

5 Administration Module

- 5.1 Enhancement in Company Maintenance screen – while creating new companies/database.
- 5.2 View Audit log by each user for a given date range
- 5.3 In the current version, under some circumstances organiseit stays minimized and the user is not able to maximize it and hence unable to work in organiseit. For this we have provided with a “Reset User Profile” in the User Screen that will reset his profile and the user will then be able to re-login back into organiseit.
- 5.4 ‘Reset Profile’ feature given in administration module changed to ‘Reset User Profile’.

6 New Improved PDF Printer

- 6.1 Organiseit has new a PDF Printer which works faster and the size of the PDF documents is smaller compared to earlier version. You can create both coloured and black and white PDF documents using the PDF Printer.
- 6.2 The PDF documents that are now created using this PDF Printer is a text searchable PDF i.e., you can open the PDF Documents and search on a specific text within the PDF Document.

7 Improved Button functionality in Word and Excel

- 7.1 The new functionality will allow you to push any type of Word File into organiseit, even if the original file or the template on which the file is based is a Read-Only Files.

8 New “Send To organiseit” shortcut

- 8.1 Now you don’t have to place the “organiseit” shortcut in the Windows → “Send To” folder. The new version will have a new shortcut installed so that whenever a user right clicks on a document on their hard drive they will see a shortcut called “Send to organiseit”. With this option now available it will not be required to create a shortcut in the Send To Folders for each user.

9 New Scanning Module

- 9.1 This module has a desktop feature – a Temporary Workarea for Scanned Documents.
- 9.2 It will allow users to scan documents and store it on the desktop and then Stack, Unstack documents.

9.3 It will also allow user to send a document stored on this desktop to be sent to organiseit database.

10 De-Link imported folders feature in properties window.

This feature is introduced to de-link imported folder.

11 Import Wizard – SQL 2005 compatible