

# FileBound 8.2

New Features Guide



# Contents

- Updates to Project Settings..... 3
- Updates to eSignature Integrations ..... 3
- Updates to Web Viewer..... 4
- Updates to Workflow..... 4
- Updates to Forms..... 6
- New Features in FileBound Connect 8.2..... 7
- New Features in Importer ..... 8
- Other Feature Updates ..... 9



# Updates to Project Settings

## Additional fields

You can now configure up to 100 additional index fields, allowing you to add even more information to your projects. These fields are non-searchable and can be text, number, date field, or option list types.

Additional fields are available on the File Entry page and in the viewers. You are also able to update an additional field using a workflow and map data from a form to an additional field.

**Note:** At this time, these fields will not appear in Connect, and Importer and Capture do not push to these fields.

Project: Account Payable Line Items Configuration: Fields/Divider/Separator

SAVE DISCARD

FIELDS DIVIDERS SEPARATORS

Number Name	Type	Key	Visual	Sort	Display	Assignments	Required
17	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Fields							
21	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24	Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Updates to eSignature Integrations

## DocuSign OAuth

We added support for OAuth authentication in the DocuSign integration.

**NOTE:** Beginning in September 2024, DocuSign is moving away from basic authentication. If you use DocuSign, you will need to reconfigure your DocuSign integration to use OAuth 2.0 authentication prior to this date.



## Updates to Web Viewer

### Ability to edit PDF documents

We now give you the ability to easily modify PDF documents right inside the Web Viewer. You can:

- Drag and drop a single PDF page into an existing PDF
- Rotate PDF pages
- Reorder PDF pages
- Delete PDF pages

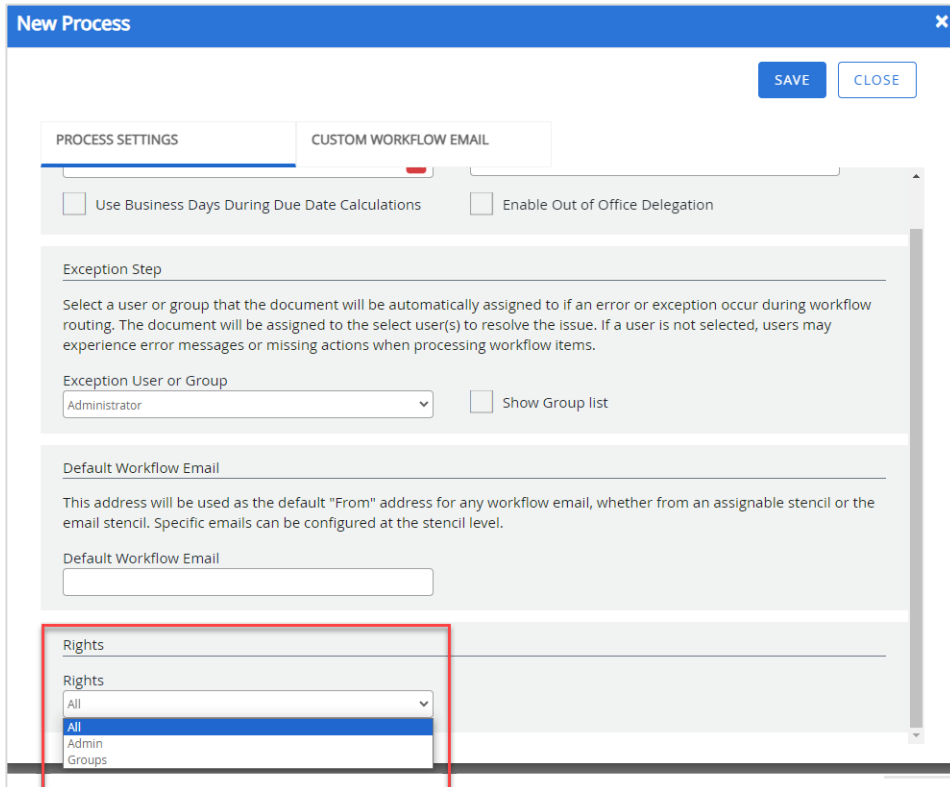
**Note:** In order to use these options, the “Display PDF documents in their Native format in the Web Viewer” setting must be disabled on the General tab in Project Settings.

## Updates to Workflow

### Group restriction

A “Rights” option has been added to the workflow Process Settings tab. This option gives you the ability to select which users can submit documents down the workflow process. You can select all users, administrators, or users that are part of a specific group.

This feature is useful when you use the child process stencil to move documents from one workflow process to another. You can prevent users from bypassing the first workflow process and sending documents down a child process.

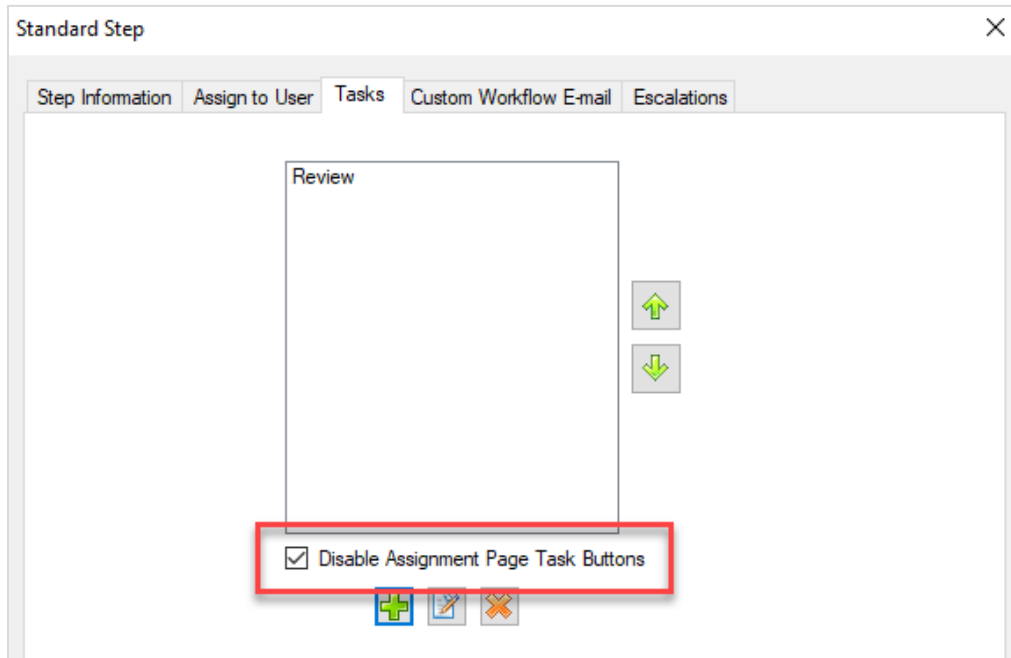


The screenshot shows the 'New Process' dialog box with the 'PROCESS SETTINGS' tab selected. The 'Exception Step' section is expanded, showing a dropdown menu for 'Exception User or Group' with 'Administrator' selected. Below this, the 'Rights' dropdown menu is highlighted with a red box, showing options: 'All', 'Admin', and 'Groups'. The 'Default Workflow Email' section is also visible, with a text input field.



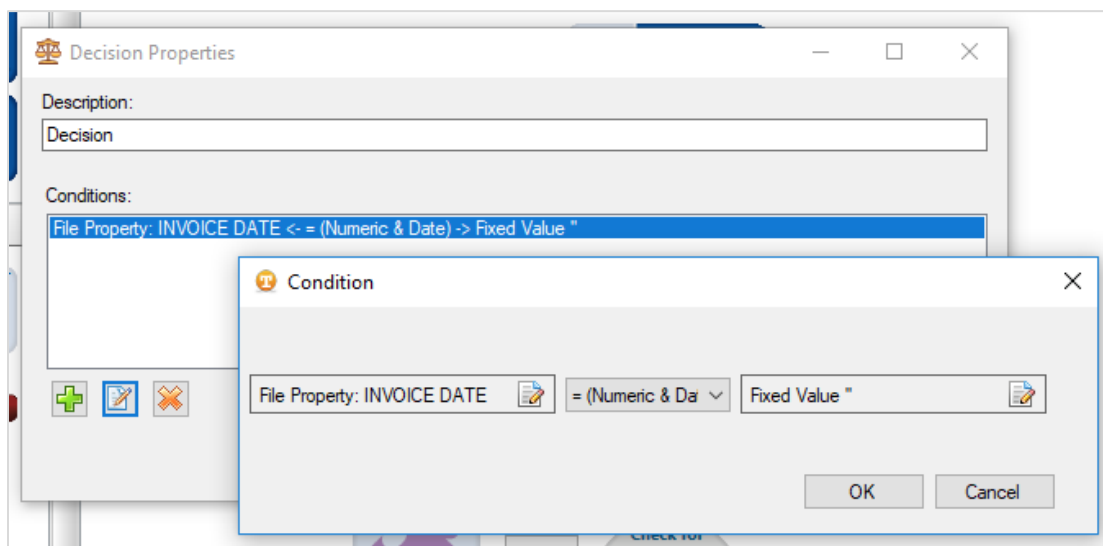
## Disable task buttons on Assignments page

An option has been added on the Task tab of standard steps that allows you to disable workflow task buttons on the Assignments page. When this option is selected, users will have to open a document in a viewer to see the workflow task buttons. This prevents users from advancing documents through workflow steps without viewing them.



## Evaluate on blank value for dates and numbers

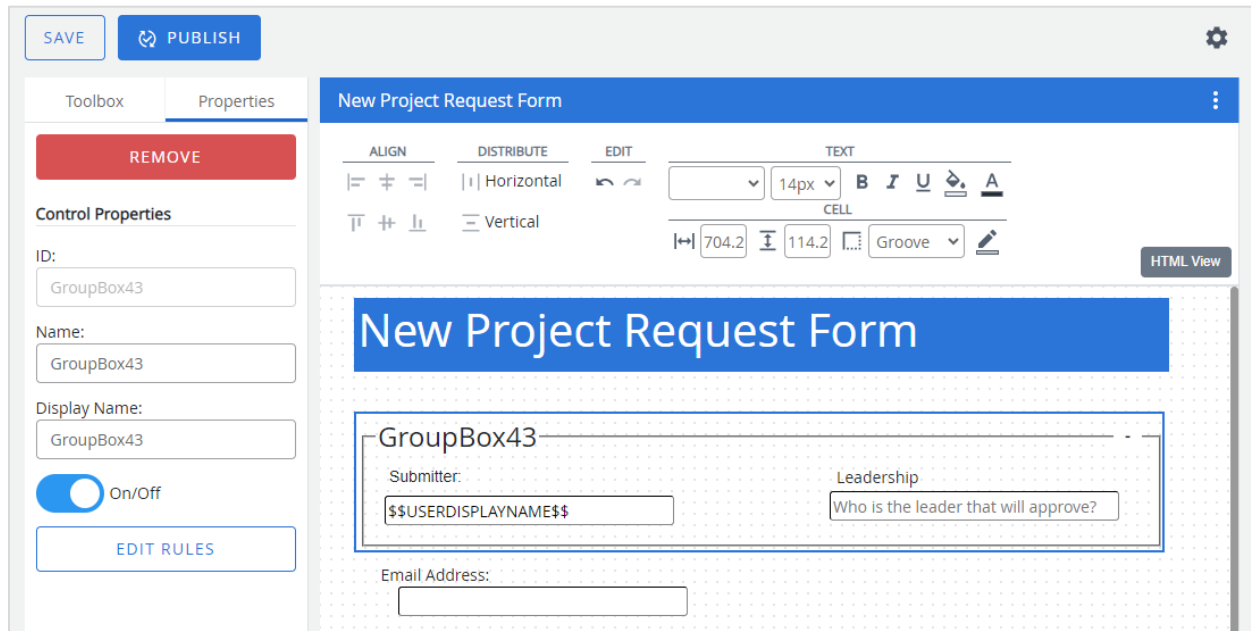
In the decision stencil, we've added the ability to evaluate a condition based on a blank value for numeric and date field types.



# Updates to Forms

## Group fields

A new GroupBox control has been added to the Forms Designer. Using this control, you can create a box and then move multiple controls into it to create a group. Once controls are grouped, you can create a single conditional rule that will be applied to the entire field grouping.



## New Features in FileBound Connect 8.2

With FileBound 8.2, we also made some changes to Connect to improve the experience and usability.

**Note:** Connect Version 8.2 is required for FileBound Version 8.2.

### SSO authentication

FileBound Drive, Microsoft Word, and the Excel Reporting Add-In have all been updated to work with SSO authentication. There is no longer a need for users to have multiple log ins to use these features.



## New Features in Importer

### Download Archives

The ability to download an archive has been moved from Server to Importer.

### Find and Update

Two new options have been added to the Upload to FileBound module when “Find and/or Update Existing Files” is selected:

- Update ALL found Files (No Document upload)
- Find and Update the same Fields

The first option gives you the ability to update the same value for all files, and the second option gives you the ability to find and update the same fields.

### Integration Platform

All functionality that existed in Integration Platform has been moved to Importer. New wizards have been added to export data from FileBound to a .csv file or to a SQL database.

### EmailTo

The Email Reader module has been updated to include an EmailTo mapping property. This property combines To recipients, CC recipients, and BCC recipients. You can map to this property using the Map Data to Files module.

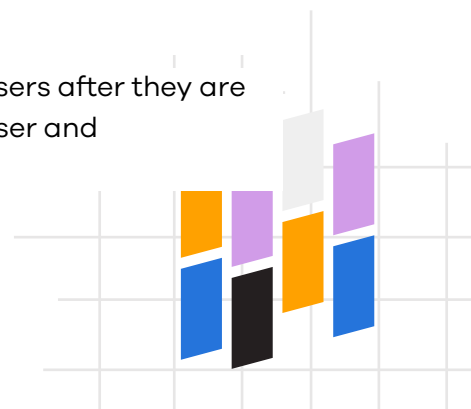
### Import Users

We’ve added 12 new options to the list of user properties available in the “Import Users from CSV File” module:

- Force Password Change
- Login Expires
- Has rights to access the system
- Clipboard Only
- Forms Only
- Hidden
- Start Screen
- User Time Zone
- Launch Viewer On Single Search Result
- Allow Only One Viewer Instance
- Send Summary Emails
- Disable Individual Assignment Notifications

With this update, user preferences no longer need to be set for single users after they are imported into FileBound. They can be defined in the CSV file for each user and automatically set when the CSV file is imported.

**Note:** A value of “1” in the CSV file will select a check box in FileBound.





## Other Feature Updates

### General

- Secure password requirements are now displayed when a user is forced to change their password

### Administration

- Removed the “Validate License” button from Main Options - General - Licensing Properties—licenses are automatically verified once a license code is applied
- Removed “Synchronize All Groups” and “Synchronize Administrators Only” buttons from the Active Directory section of Main Options - Security
- Removed the Double Entry option in project index field settings

### Forms

- The ‘Configure Validation’ option is now disabled in the Forms Designer when a date field is mapped
- A date format option has been added to field configuration for unmapped date fields in the Forms Designer
- Users are now able to delete rows from forms
- The FileBound logo on the Forms Portal can now be clicked to take you back to the main portal page
- Mapped calculation fields are now updated in view/edit forms that are created from submission forms
- A warning message is displayed when there is a form field mapped to a date field that has a mask applied
- Total rows in form tables will display in the same format as the configured column
- Subforms with file attachments can be submitted from the main form

### Reports

- Added a User Name column to the System Errors report.

### REST API

- Added support for line items search in the Files endpoint in REST API
- Added new Document Count endpoint to the REST API
- Added support for line items search in the Project endpoint in REST API



## Search

- Hidden projects are now available to project and system administrators on the Search page
- Increased the maximum export size from the Search page to 5,000 lines or 200 pages

## Web Viewer

- .txt files can now be grouped with other .txt files
- Added an external share action in the Document Journal
- The Document Journal now shows the name of the user that the assignment is routed to rather than the user that routed it
- Related files tabs now display different names when a project has multiple document relationships with the same project
- A related document opens immediately when it is clicked
- The Document Journal now displays seconds on timestamps
- Line breaks are reflected in the Document Journal, File Journal, and Workflow Comments
- Improved the loading time of line items

## Workflow

- Added a Published By column on the Workflow Revisions page
- E-Form and Custom Action stencils will now progress using the default separator/divider if it is required in the project
- Added the option to send a URL link to the anonymous form in the escalation email on the anonymous step configuration
- Users can now view assignments by workflow step name in the left pane of the Assignments page
- Users are now able to sort items on the Assignments page differently for workflows from the same project
- Removed EformProcess from the list of actions available in the Custom Action stencil

## Workspace

- A default set of nine preconfigured widgets will now be added for users with a blank Workspace
- Added a My Orphaned Documents widget to the Workspace—this allows you to manage documents that are abandoned over the course of a workflow and never assigned to a user



## Questions? We're here to help.

Our expert team is here to help you get the most out of FileBound. If you have any questions about the release or need assistance resolving any issues, please reach out to your Customer Success Manager, authorized FileBound reseller, or our Support team.

[filebound-support@uplandsoftware.com](mailto:filebound-support@uplandsoftware.com)

