

# FileBound 8.1.1

New Features Guide



## Contents

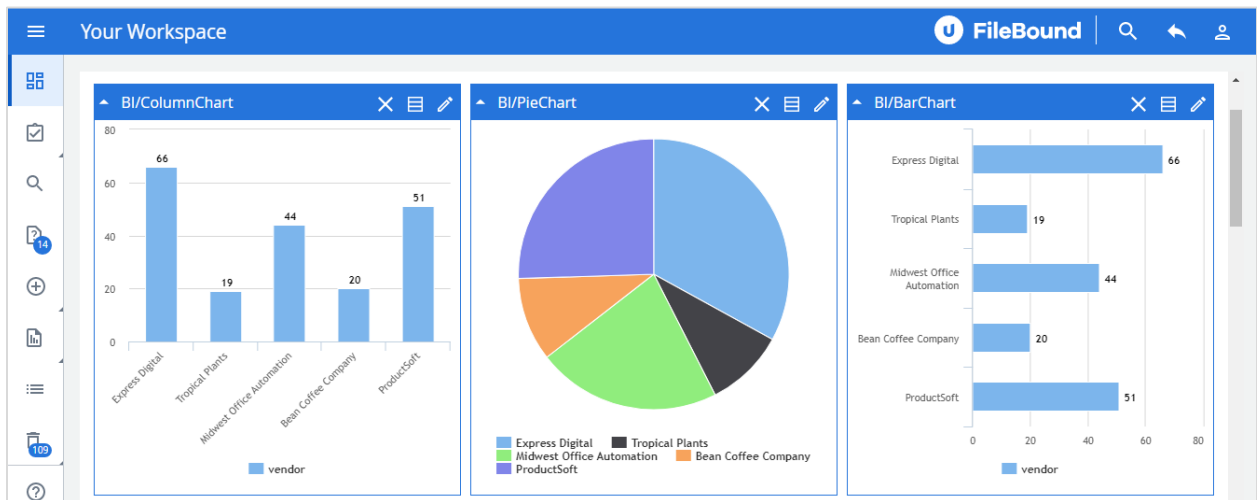
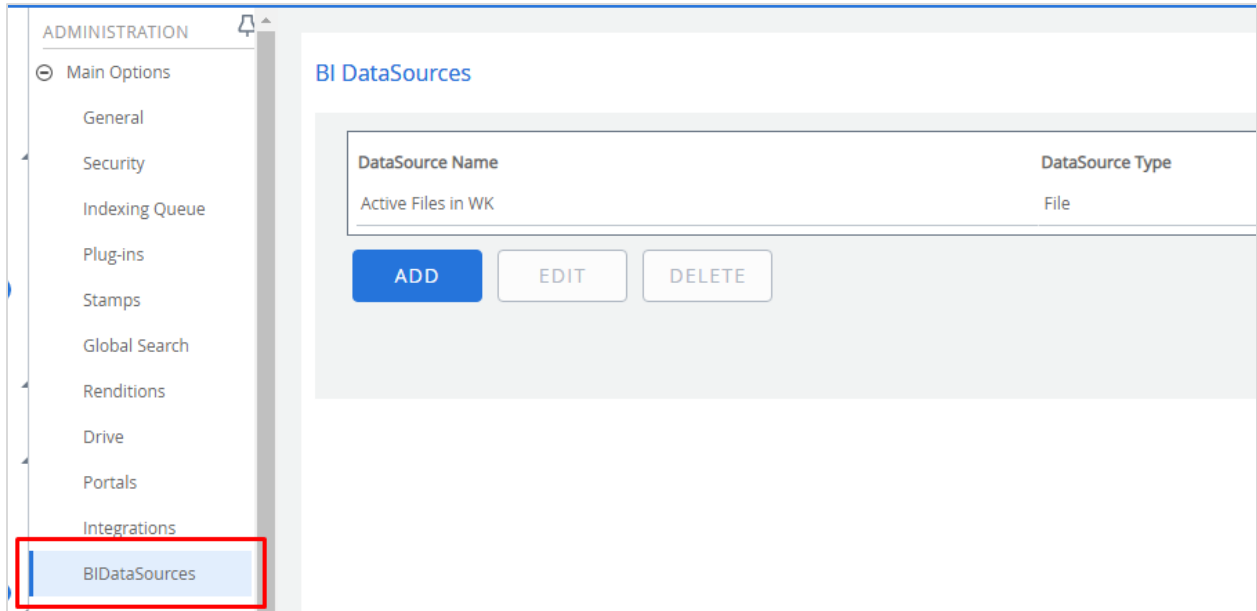
General Updates.....	3
Business intelligence reporting .....	3
Shortcut integration.....	4
Enhanced Global Search functionality .....	4
Updates to Forms.....	6
Refreshed look and feel in the Forms Designer.....	6
File.URL and Document.URL variables .....	6
Updates to Project Settings.....	7
YYYY-MM-DD date mask.....	7
Updates to Reports.....	7
Workflow Status Report - Route Path ID.....	7
Updates to the Web Viewer.....	8
View multiple assignments.....	8
Share files externally .....	8
Other Feature Updates .....	9



# General Updates

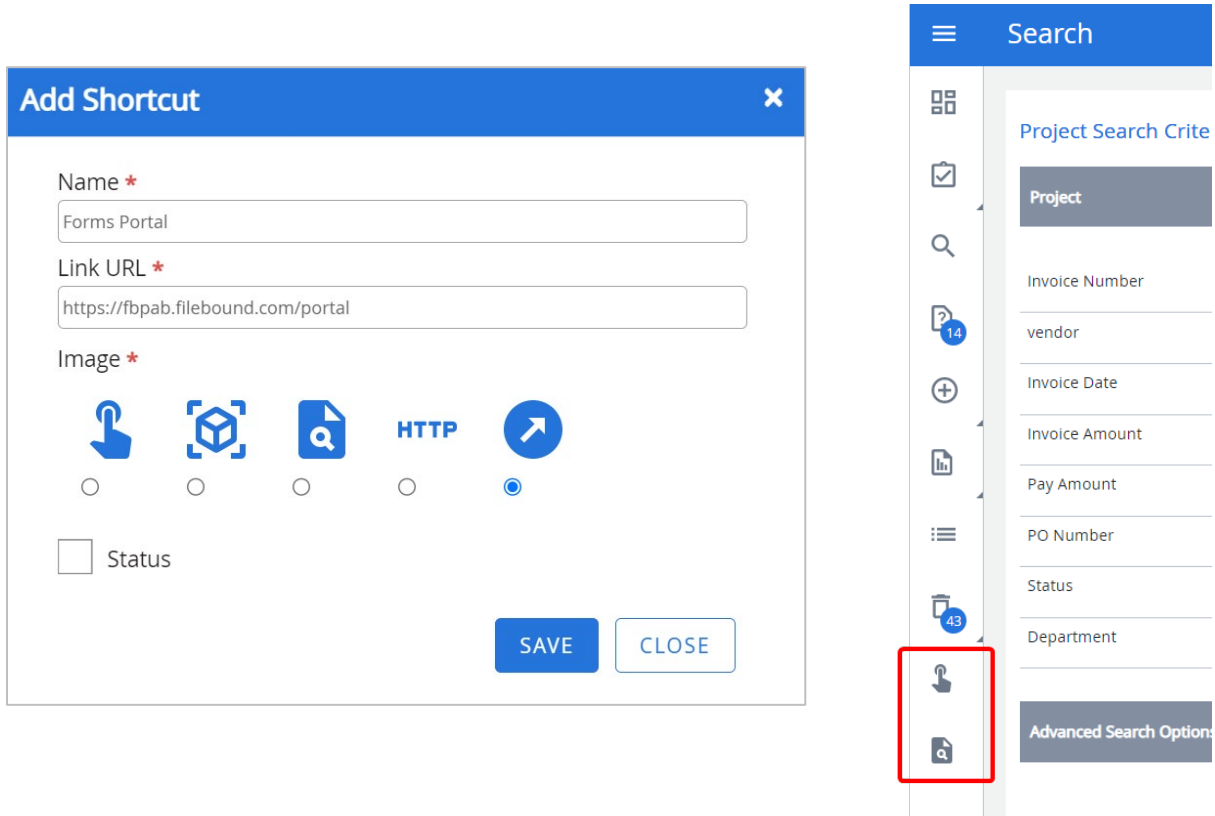
## Business intelligence reporting

Business intelligence reporting gives customers customizable insights into their FileBound data. Administrators can configure business intelligence data sources to define a subset of records in FileBound. These data sources can then be used by the new business intelligence widgets on the Workspace giving customers more control over the data they see.



## Shortcut integration

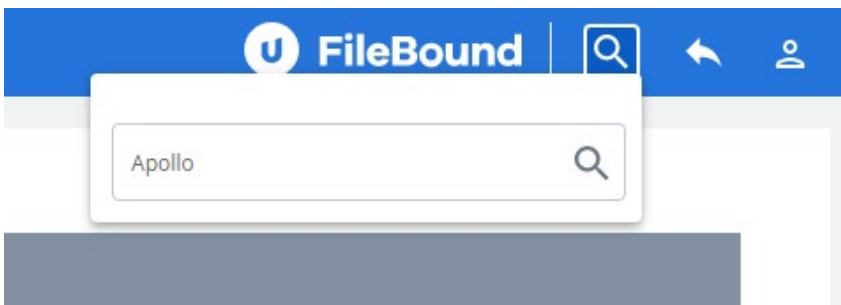
The System Administrator can now customize the Navigation Menu by adding up to three different shortcuts. Shortcuts will open a configured URL in a new browser tab allowing users to quickly access URLs from within FileBound.



## Enhanced Global Search functionality

Global Search allows you to search across all FileBound projects with one query. A System Administrator determines what content is searched during a global search by selecting an option in Main Options - Global Search.

Note: On-premise customers will need to use the Global Search Indexer to keep data for global search up to date.



The search results page is displayed matching the search criteria. Search results will either be a file or a document. A file result will look like this:



122 Results Found -- Displaying 1 - 25

PREVIOUS NEXT

Search: dutch AND qjc

CLEAR FILTERS

Project(s): 122

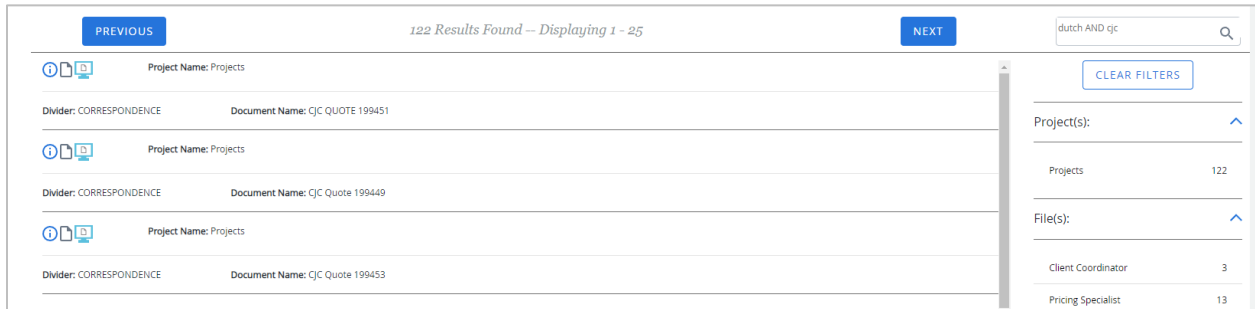
File(s):

- Client Coordinator: 3
- Pricing Specialist: 13
- Location: 122
- Vendor: 122

Document(s):

Project Name: Projects	Location: Dutch Valley PR Number: 0079499587 MfgID: 67 Closing Date: 2022-10-20	Project Number: CJC-0719-065A Vendor: CJC Pricing Specialist: Dutch Valley	Status: No Bid Part Number: 2520-6B-51 Client Coordinator: Dutch Valley	Solicitation Received Date: 2019-07-25 NSN: 3950015957596 Projectid: 201418	Solicitation Number: SPEBEE19T2230 Urgent: URGENT Customer Reference #: 0079499587
Project Name: Projects	Location: Dutch Valley PR Number: 0080741844 PO: Test Dave Projectid: 201420	Project Number: CJC-0719-067A Vendor: CJC Urgent: URGENT Customer Reference #: 0080741844	Status: Open Quote Part Number: 871B1207 MfgID: 67 Closing Date: 2019-08-02	Solicitation Received Date: 2019-07-26 NSN: 5310-01-662-1360 Pricing Specialist: Dutch Valley	Solicitation Number: SPE5E819T155X SO: Dave Testing Client Coordinator: Dutch Valley
Project Name: Projects	Location: Dutch Valley PR Number: 0080725032 MfgID: 67 Closing Date: 2019-08-02	Project Number: CJC-0719-068A Vendor: CJC Pricing Specialist: Dutch Valley	Status: Open Quote Part Number: 004C1162-1 Client Coordinator: Dutch Valley	Solicitation Received Date: 2019-07-26 NSN: 5307013920741 Projectid: 201421	Solicitation Number: SPE5E419T142L PO: Dave 2 Customer Reference #: 0080725032
Project Name: Projects	Location: Dutch Valley PR Number: 0079498246 Pricing Specialist: Dutch Valley	Project Number: CJC-0419-086B Vendor: CJC Client Coordinator: vda.akaadom@dutchvalley.com	Status: No Bid Part Number: 2560350-2 Projectid: 199271	Solicitation Received Date: 2019-06-27 NSN: 3030-00-073-6356 Customer Reference #: 0079498246	Solicitation Number: SPE7L519T4232 MfgID: 67 Closing Date: 2019-07-29

And a document result will look like this:



122 Results Found -- Displaying 1 - 25

PREVIOUS NEXT

Search: dutch AND qjc

CLEAR FILTERS

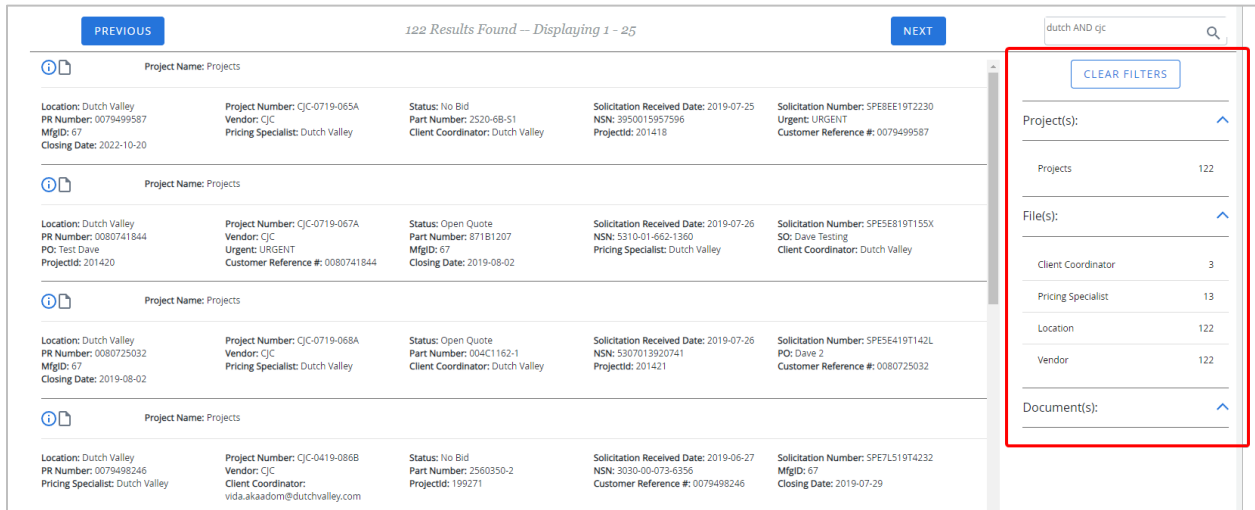
Project(s): 122

File(s):

- Client Coordinator: 3
- Pricing Specialist: 13

Project Name: Projects	Divider: CORRESPONDENCE	Document Name: CJC QUOTE 199451
Project Name: Projects	Divider: CORRESPONDENCE	Document Name: CJC Quote 199449
Project Name: Projects	Divider: CORRESPONDENCE	Document Name: CJC Quote 199453

Filters, on the right side of the global search results, can be used to make it easier to locate results in specific projects, files, or documents.



122 Results Found -- Displaying 1 - 25

PREVIOUS NEXT

Search: dutch AND qjc

CLEAR FILTERS

Project(s): 122

File(s):

- Client Coordinator: 3
- Pricing Specialist: 13
- Location: 122
- Vendor: 122

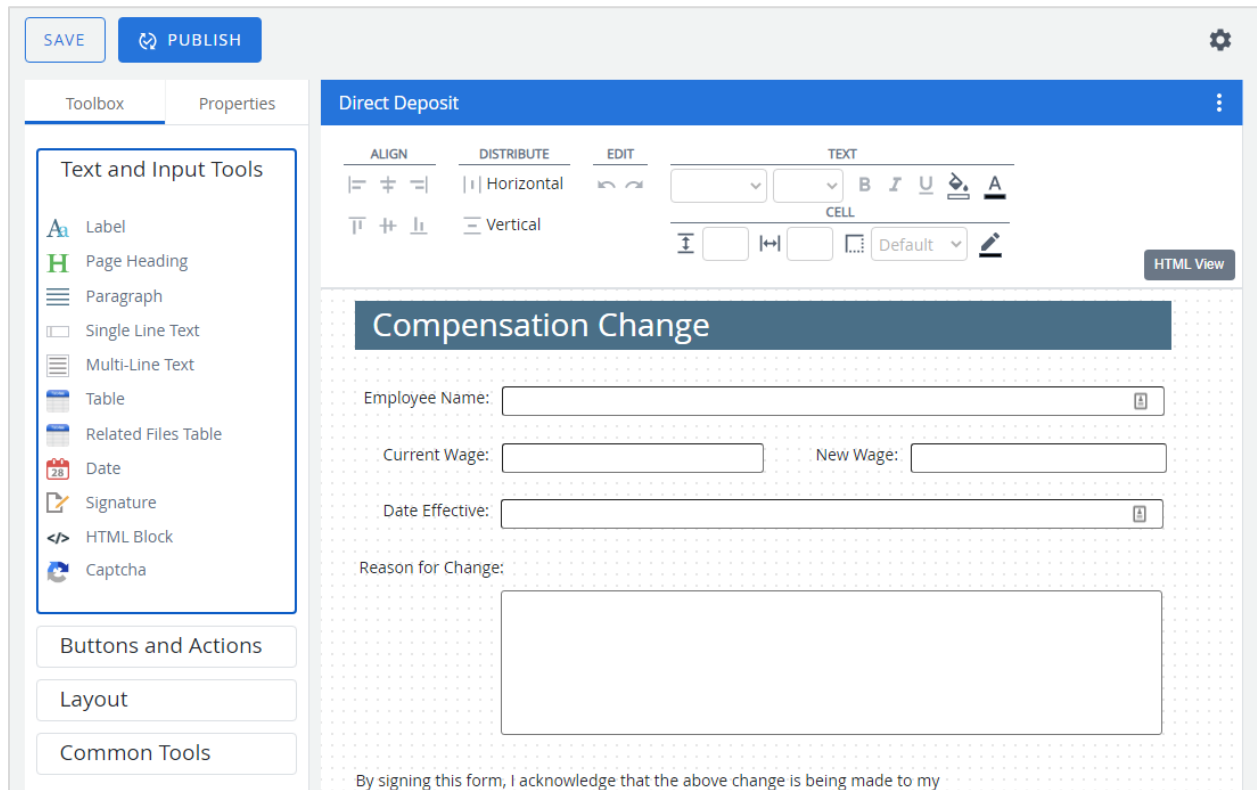
Document(s):



# Updates to Forms

## Refreshed look and feel in the Forms Designer

We've given the Forms Designer User Interface a fresh but familiar look. The new design updates the color scheme and iconography to be consistent for the end user. While we applied new styles, the user functionality is generally the same, making the transition to the new version easy for end users.



## File.URL and Document.URL variables

File.URL and Document.URL variables have been added in the Structured Forms Builder. Users can use these variables in forms to return URLs to view a file or document in the Web Viewer.



# Updates to Project Settings

## YYYY-MM-DD date mask

A new data mask has been added for date type index fields: YYYY-MM-DD

Edit Field: Invoice Date
✕

SAVE
CLOSE

**GENERAL**

**Field Name \***

**Type**

**Character Length (Min and Max)**

Min  Max

**Mask**

MM/DD/YY

MM/DD/YYYY

MM-DD-YY

MM-DD-YYYY

MON DD, YY

MON DD, YYYY

DD/MM/YY

DD/MM/YYYY

DD-MM-YY

DD-MM-YYYY

YYYY-MM-DD

**Default**

**Project Link**

# Updates to Reports

## Workflow Status Report - Route Path ID

A Route Path ID column has been added to the Workflow Status report. This column allows users to differentiate between re-routed or double routed items using the unique path ID.

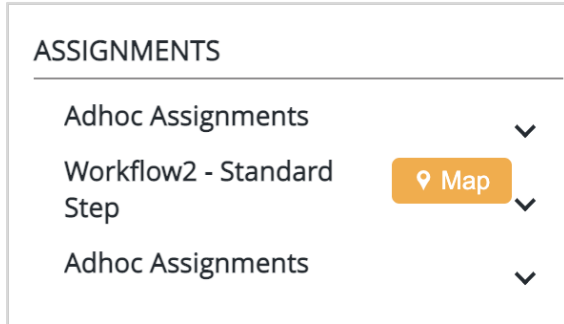
Workflow Status Report															Refresh   Edit Report   Options ▾											
															Found 15 Item(s)											
Custom...	Date	Vendor	Status	GL Co...	Numb...	Amount	Descri...	State	County	City	Option	Key V...	Separ...	Divider	Route ...	Step ...	Assign...	Assign...	Start ...	Due D...	Comp...	Comp...	Com...	Previous...	Comple...	Route ...
	654789	9/27/20...	ABM B...	A/E - SI...	15000		Florida	Collier	Naples				9/2/2022	DIV3	Route F...	Route t...	Brent P...	Enterpr...	9/23/20...					names ...		354
	654789	9/27/20...	ABM B...	A/E - SI...	15000		Florida	Collier	Naples				9/2/2022	DIV3	Route F...	Route t...	Blake G...	Enterpr...	9/23/20...							355
	654789	9/27/20...	ABM B...	A/E - SI...	15000		Florida	Collier	Naples				9/2/2022	DIV3	Route F...	Route t...	Brandos...	Enterpr...	9/23/20...							355
	0987	8/2/2019	Alfred J...	A/R - Pr...	100.0000								9/4/2022	DIV2	Route P...	Test	Blake G...	Blake G...	1/15/20...		2/25/20...			Blake G...		365
	98765	8/23/20...	Americ...	Unifor...									9/4/2022	DIV2	Route P...	Test	Blake G...	Blake G...	1/15/20...		4/19/20...				Reassign	366
	654789	9/27/20...	ABM B...	A/E - SI...	15000		Florida	Collier	Naples				9/2/2022	DIV3	Route P...	Test	Blake G...	Blake G...	1/15/20...							367
	0987	8/2/2019	Alfred J...	A/R - Pr...	100.0000								9/4/2022	DIV2	Route P...	User Lo...	Admini...	Admini...	10/26/2...		11/23/2...			Test Ro...	Reassign	468
					123		Arkansas						123	8	7	Ad-hoc Ro...	Shesha...	Admini...	11/2/20...		11/21/2...			Cancel	Cancel	470
	0987	8/2/2019	Alfred J...	A/R - Pr...	100.0000								9/4/2022	DIV2	Route P...	User Lo...	Brent P...	Admini...	10/26/2...		10/25/2...			Test Ro...	Reassign	468
	98765	8/23/20...	Americ...	Unifor...									9/4/2022	DIV2	Route P...	Test	Natalia ...	Natalia ...	1/15/20...		9/9/2022				Reassign	366
	0987	8/2/2019	Alfred J...	A/R - Pr...	100.0000								9/4/2022	DIV2	Route P...	Test	Blake G...	Blake G...	5/3/2022							546
	98765	8/23/20...	Americ...	Unifor...									9/4/2022	DIV2	Route P...	Test	Blake G...	Blake G...	5/3/2022							547
	654789	9/27/20...	ABM B...	A/E - SI...	15000		Florida	Collier	Naples				9/2/2022	DIV3	Route P...	User Lo...	Admini...	Blake G...	5/3/2022							548
					123		Arkansas						123	8	7	Route P...	User Lo...	Admini...	Blake G...	5/3/2022						549
	0987	8/2/2019	Alfred J...	A/R - Pr...	100.0000								9/4/2022	DIV2	Route P...	User Lo...	Project ...	Natalia ...	10/26/2...					Test Ro...	Reassign	468

7

## Updates to the Web Viewer

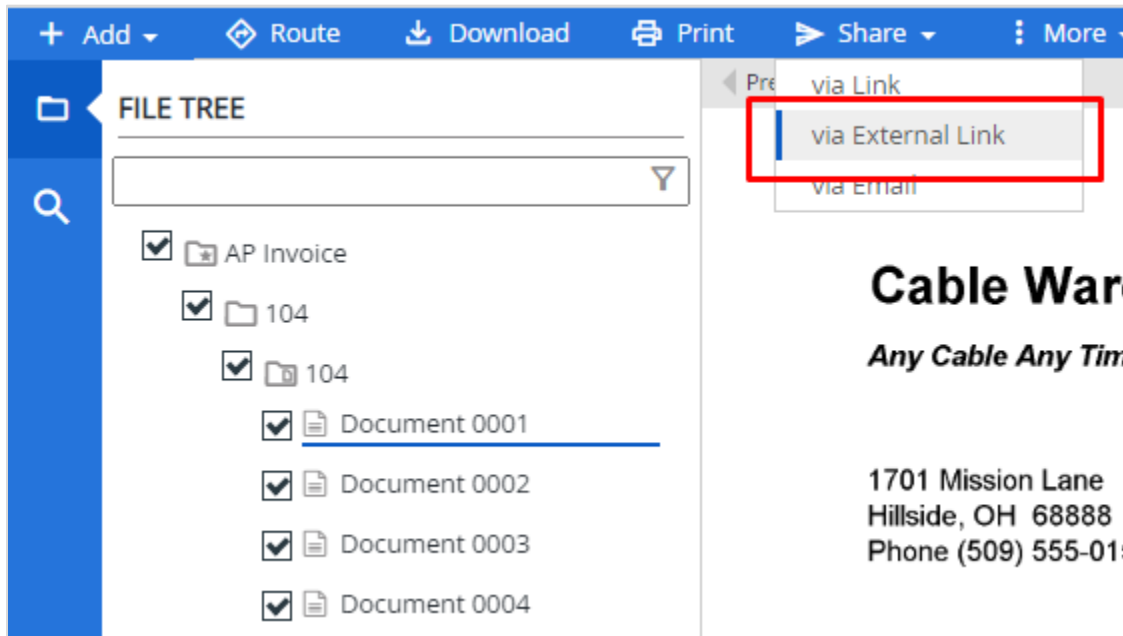
### View multiple assignments

Users can now view multiple assignments for the same document in the Assignments section of the Web Viewer. Assignments are sorted by oldest to newest.



### Share files externally

Users can now share entire files externally from the Web Viewer. When a file is shared, all documents within the file are shared.





## Other Feature Updates

### General

- Users can now include the character string "&#" in a password.

### Administration

- The ability to import users has been deprecated. This can be achieved using Importer Pro.

### Forms

- Eform Processes have been deprecated. Existing eform processes will still work; however, you will no longer be able to add a new eform process or edit an existing one.
- The Form Category link is now URL encoded.
- Added a visual status indicator for Form Link controls in the Forms Designer
- Added a new table type to the Forms Designer: Related Files table
- The undo/redo history in the Forms Designer is now cleared when HTML view is used.
- Added the option to configure a tooltip for single line text controls in the Forms Designer
- Updated the Forms Designer user interface styling to reflect global Upland Software design requirements
- Users are now able to make submission form controls read-only in the Forms Designer.
- Date fields in web forms that are mapped to an index field will now use the index field date mask.
- Added FILE.URL and DOCUMENT.URL variables in the Structured Form Builder



## Web Viewer

- Updated the message displayed in the dialog box that appears when opening the Advanced Line Items window
- Users are now prompted to save unsaved changes to HTML forms in the Web Viewer.
- Adding documents in between existing documents using drag-and-drop no longer changes the document sort order.
- The Advanced Line Item window now only displays index fields where the Display option is selected in index field configuration.
- Added support for drag-and-drop uploading in thumbnail view.
- Multiple assignments for the same document are now displayed in the Content Toolbar Assignments section.
- Document actions for adhoc routing are now displayed in the Journal.
- PDF documents can now be grouped with documents TIFF and JPEG formats.
- New pages can now be inserted into existing document groups.
- Added a 'Copy Link' option when sharing documents and files externally
- Multiple files or documents can now be shared externally.
- Added pagination to Related Documents Panel tabs
- Users are now able to group PDF documents with documents in TIFF, JPEG, and PNG formats.
- Users can now navigate directly to a document in a document group by using the document ID in the Web Viewer URL.
- Column sorting is now available in the Related Files and Related Documents panels.

## Windows Viewers

- Calculation fields are now read only and cannot be edited.
- When a user views a form from the Windows Viewer, it will now open in Microsoft Edge instead of Internet Explorer.

