

FileBound 8.1

New Features Guide



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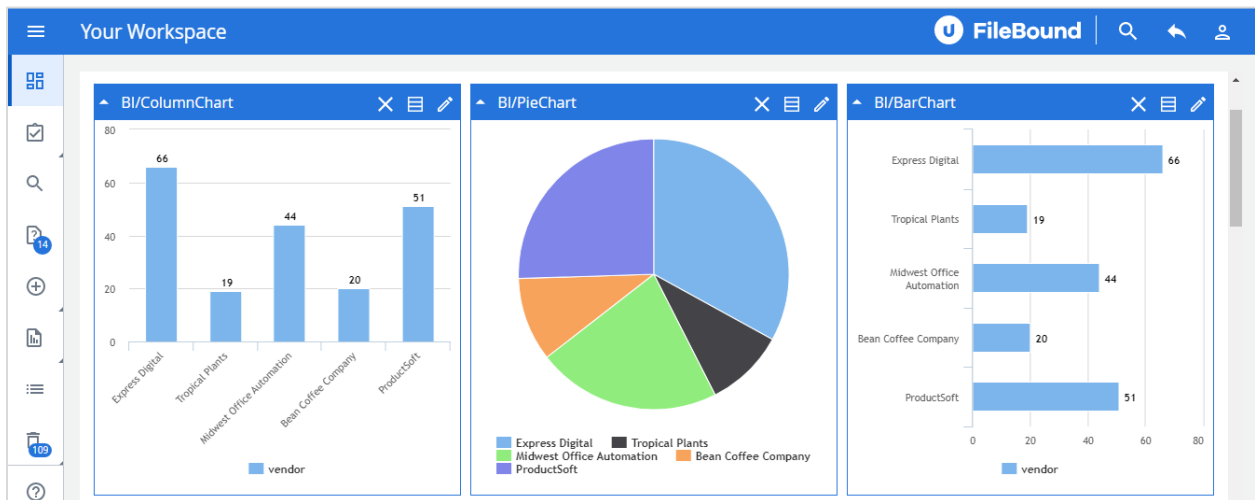
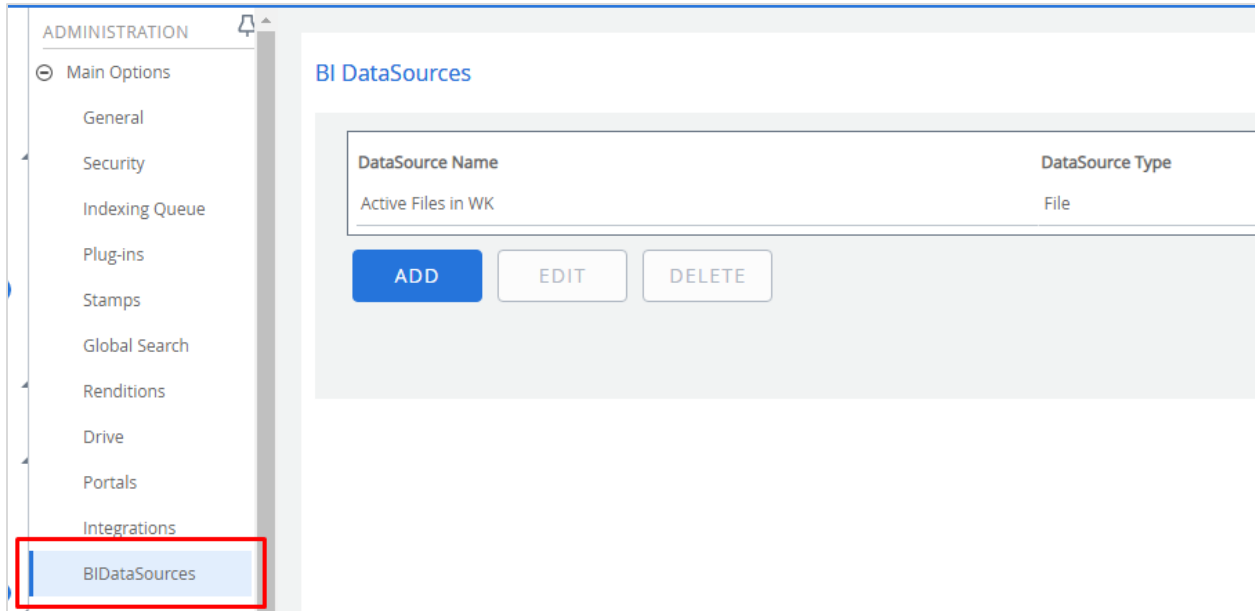
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General Updates

Business Intelligence Reporting

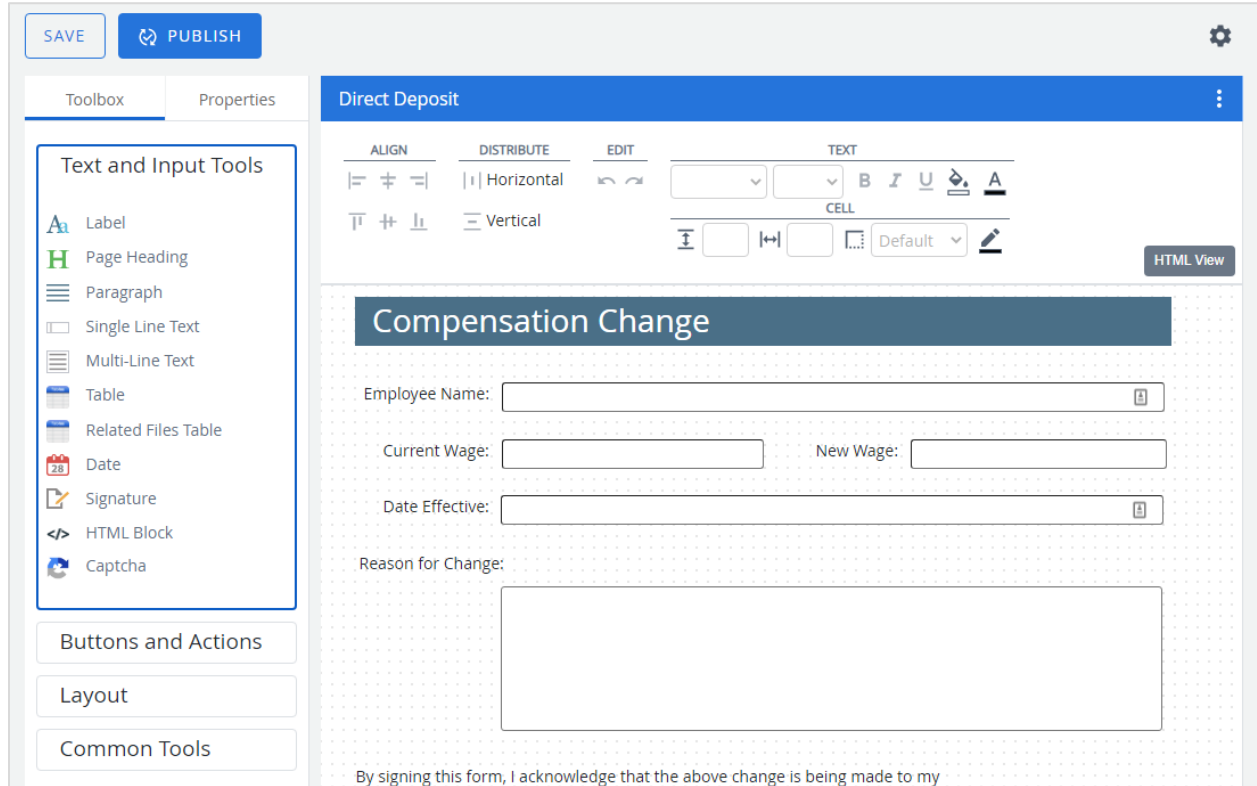
Business intelligence reporting gives customers customizable insights into their FileBound data. Administrators can configure business intelligence data sources to define a subset of records in FileBound. These data sources can then be used by the new business intelligence widgets on the Workspace giving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



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

Date Field

Character Length (Min and Max)

Min Max

Default

Project Link

Cascade By City ID

Mask

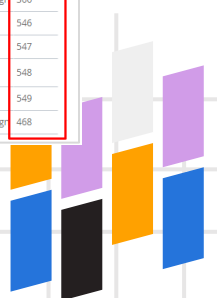
- MM/DD/YY
- MM/DD/YYYY
- MM-DD-YY
- MM-DD-YYYY
- MON DD, YY
- MON DD, YYYY
- DD/MM/YY
- DD/MM/YYYY
- DD-MM-YY
- DD-MM-YYYY
- YYYY-MM-DD

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.

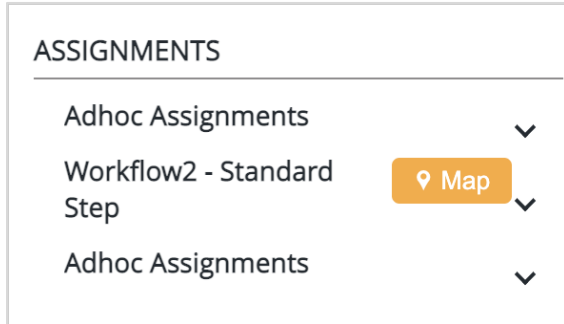
Workflow Status Report															Refresh Edit Report Options											
															Found 15 Item(s)											
Custom...	Date	Vendor	Status	GL Co...	Numb...	Amount	Descri...	State	County	City	Option	Key V...	Separ...	Divider	Route ...	Step ...	Assign...	Assign...	Start ...	Due D...	Comp...	Comp...	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
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	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



Updates to the Web Viewer

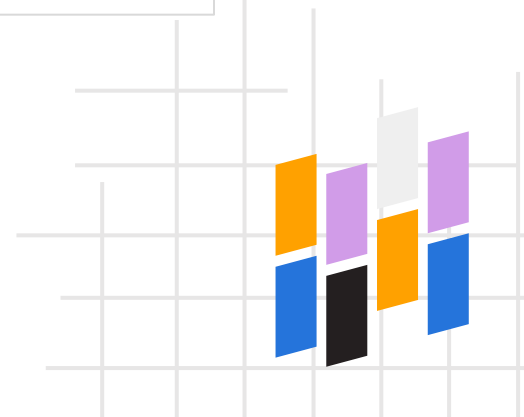
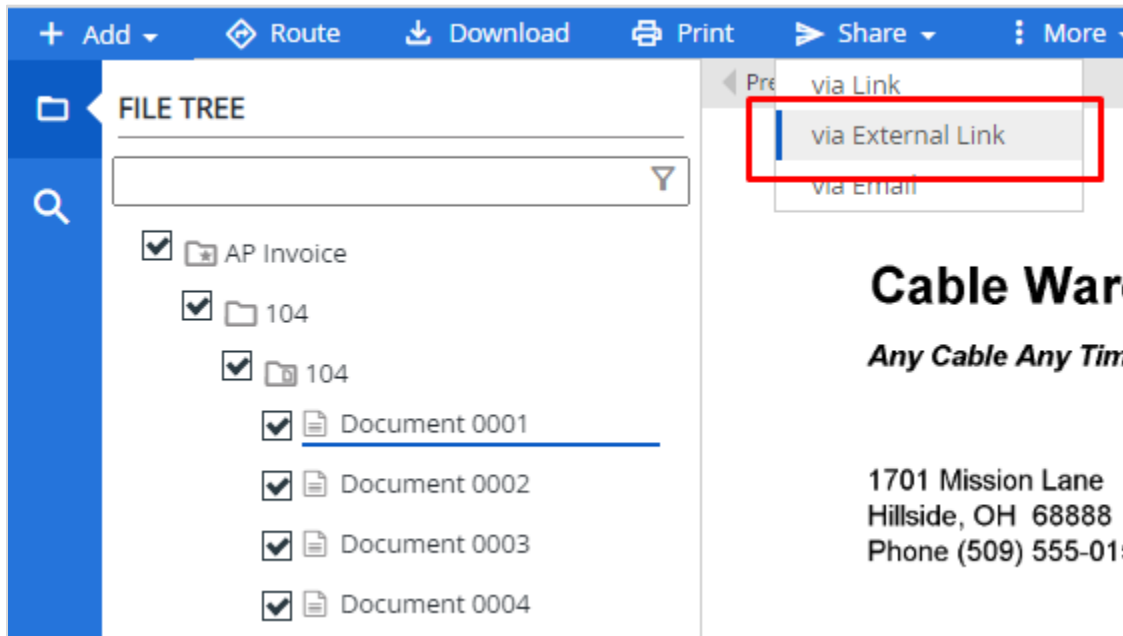
View multiple assignments

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

Search

- Enhanced Global Search functionality



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.

