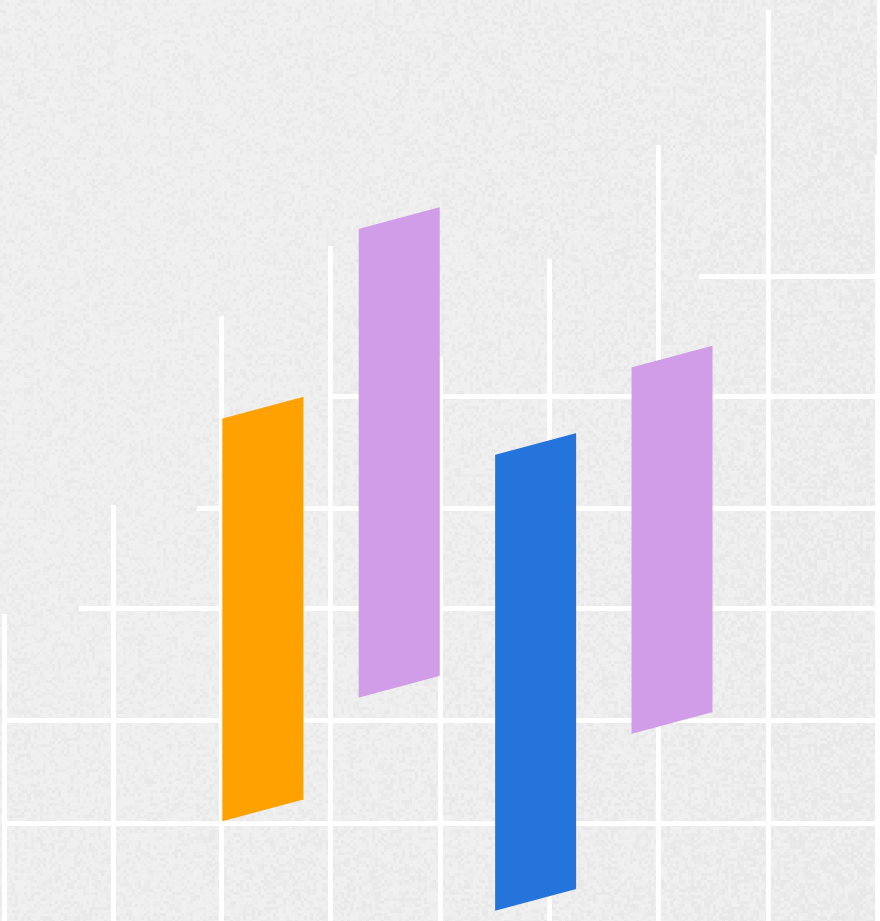
# FileBound 8.0

New Features Guide



FileBound

FileBound

# Contents


General Updates ..... 3

Updates to Project Settings ..... 4

Updates to E-signature Integrations ..... 9

Updates to Web Viewer ..... 9

Updates to Workflow ..... 9

Updates to Forms ..... 12

New Features in FileBound Connect 7.0 ..... 15

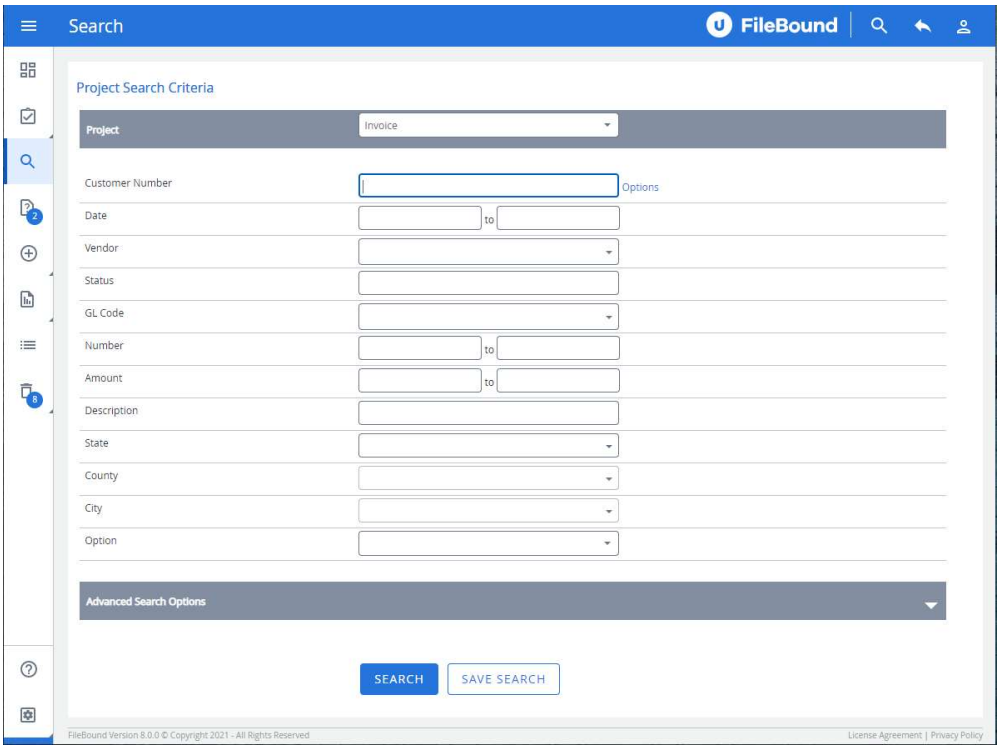
New Features in Importer ..... 16

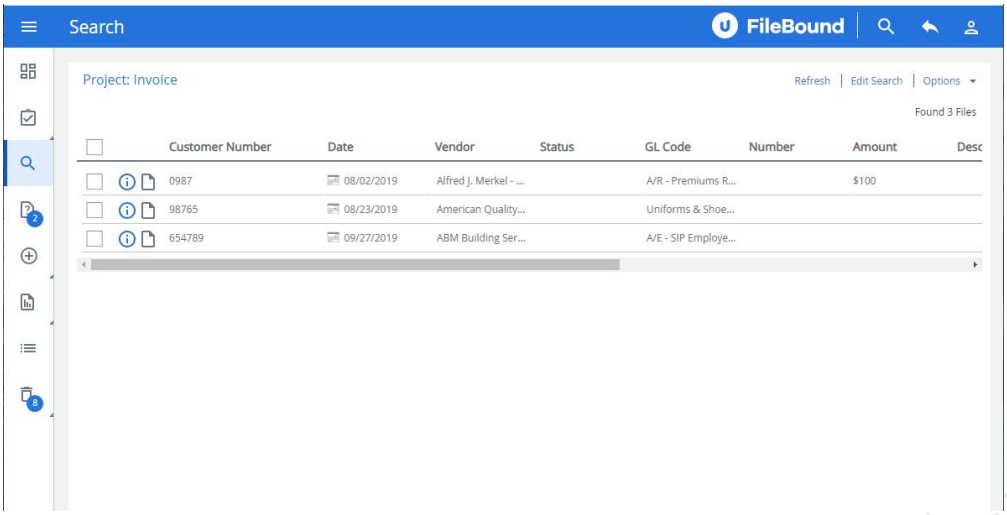
Other Feature Updates ..... 17

# General Updates

## Refreshed look and feel in the User Interface

We've given the 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.



## Localization

Along with the User Interface changes, FileBound will now use the browser's language to present the end-user areas of the User Interface in English, French, German, Spanish, and Italian.

## Added upload option to File Details page

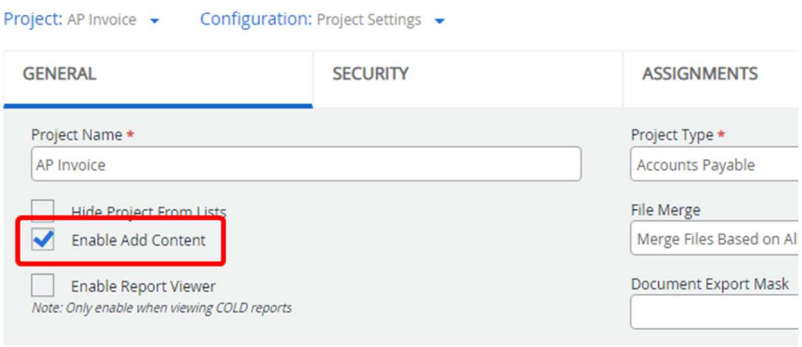
Users can now upload documents directly to the File Details page. In the previous version, users were able to scan documents to add them to the File Details page. This update allows the user to upload documents faster without opening the viewer.

- **The feature in action**
  When a search has a single result, it automatically opens the File Details page. Users are now able to upload new documents directly to this file without opening the viewer.

# Updates to Project Settings

## Enable add content

The Add Content page allows users to add a new file to a project. eForms allow administrators to create custom pages for starting a process, but users can be confused and use the Add Content page instead of the form. With this new option, Administrators can control how users add new files and require them to use forms instead of the Add Content page. When this setting is disabled, FileBound will remove the project from add content list. This option is selected by default.



## Document export mask

Admins can configure the naming convention used when exporting documents using replaceable variables. The following variables can be used:

| Variable | Displays |
|---|---|
| $$Field1$$ - $$Field20$$ or $$F1$$ - $$F20$$ | The value stored for index field 1 -20. |
| $$DIVIDER$$ or $$DIV$$ | The name of the divider that the document is stored in within FileBound. |
| $$SEPARATOR$$ or $$SEP$$ | The name of the separator that the document is stored in within FileBound. |
| $$DOCUMENTID$$ | The DocumentID for the exported document. |
| $$DOCUMENTNAME$$ | The name of the page that has been assigned to the exported document. By default, the page is named "Page 000x" where the page number is incremented by 1 each time a new page is added to the divider. If the default naming is used and a specific name has not been provided, the Name property returns a blank value. |
| $$FILEID$$ | The FileID for the file containing the exported document. |

## Separator required

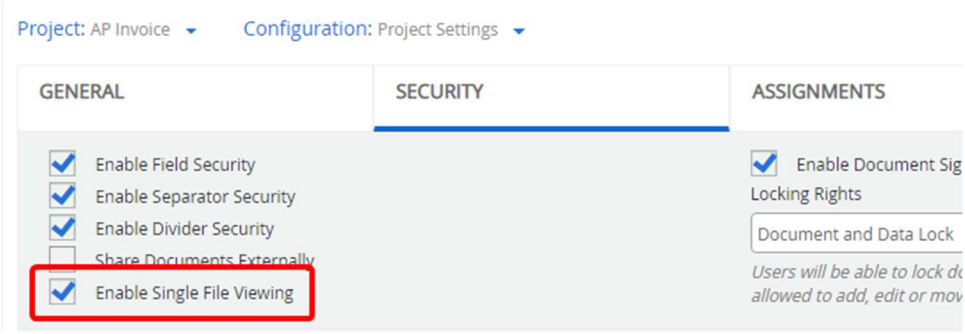
When saving a document, the user will be required to select a separator. This improves the data structure of the system by ensuring a consistent metadata structure is being applied.

## Divider required

When saving a document, the user will be required to select a divider. This improves the data structure of the system by ensuring a consistent metadata structure is being applied.

## Single file viewing

Web Viewer will open a new window/tab for each file instead of loading multiple files into the File Tree. This may impact your ability to drag and drop documents between files in the Web Viewer.




- **The feature in action**
  In some instances where sensitive data is present, administrators may want to prevent users from opening the documents for two different people in the same viewer window and having a user mix up their information. This setting forces web viewer to open each file in its own tab instead of opening multiple files in the same view.

## Search format

This update gives users the ability to toggle different default search behavior. The default behavior can be overridden on the search page using the options link or the wildcard characters.

- **Default:** Search Text + "%"
  The default search behavior, which searches using a wildcard at the end of the text.
- **Exact:** Search Text + "~"
  This makes the default search behavior an exact match search, useful for numerical key fields like an employee id.
- **Contains:** %" + Search Text + "%"
  This makes the default search behavior a contains search, meaning it will search anywhere in the field for the Search Text instead of just the beginning.

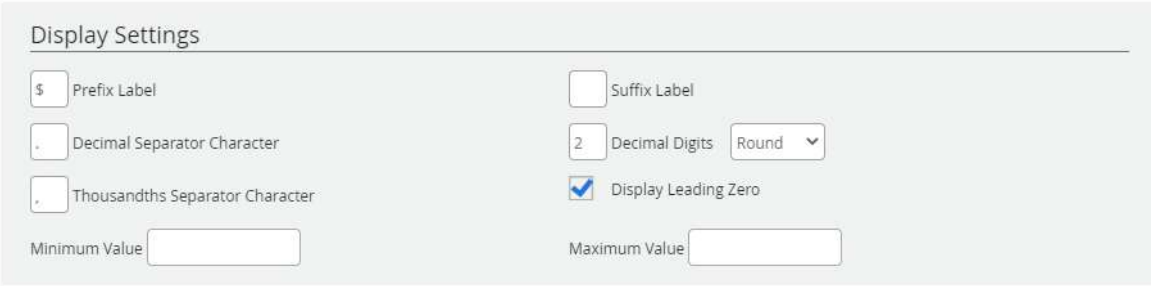
## Numeric Fields

In this release, we've rewritten everything about how number fields work in FileBound. On the backend, we've rearranged the data structure so that numbers are stored as numbers in the database, opening an entirely new level of configurability for this field type.

### Configurable numeric fields

We've added a whole new section of configuration options for number fields. With these new settings, you can add a label character before and/or after the number using the prefix and suffix labels. You can specify if a thousandth separator is used and which character is displayed, as well as the decimal character and if a leading zero is displayed. You can now also specify to display up to four significant (decimal) digits and whether they are displayed by truncating or using common rounding principals. Finally, you can specify the minimum and maximum value, which is evaluated numerically instead of based on the count of digits. This means you can prevent users from entering negative values.

**Note:** numeric fields will only support numbers up to 15 digits and 4 decimal digits. Numeric fields should not be used for numeric sequencing data such as long account numbers or telephone numbers. This type of data should use the "text" field type.

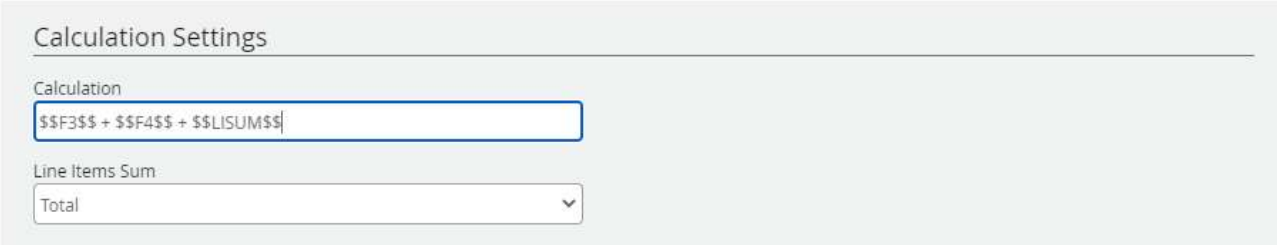



- **The features in action:**
  - Prefix Label: The "$" dollar sign is used before the number for US Currency
  - Suffix Label: The Currency symbol for Euros "€" is placed after the number in Germany/France
  - Decimal Separator: A period "." is used in the US for numbers with a decimal value such as 1.24. In Germany/France, a "," is used instead: 1,24.
  - Thousandths Separator: A comma "," is used in the US to group large numbers into sets of three digits, but a period "." is used in Germany/France.
  - Decimal Digits: most currency values are rounded to 2 digits, so .494 cents is rounded down to .49, but .495 cents is rounded up to .50. Non-currency values in some industries might just be truncated to 3 digits, so .4944 or .4945 are both displayed as .494

## Numeric field calculations

We've added the ability to populate a numeric field using a live calculation. This allows users to use the replaceable field variables and basic mathematical operators to calculate a field. $$F1$$-$$F20$$ are supported as well as addition ("+"), subtraction ("-"), multiplication ("*") and division ("/") as well as order of operations via parenthesis "(","(". Non-numerical data is ignored. You can also include the sum of one of the related file (line item) fields by selecting the appropriate field in the Line Items Sum drop down and using $$LISUM$$ in your calculation expression.

When a calculation is configured for a field, the field is automatically set to read only in the User Interface.

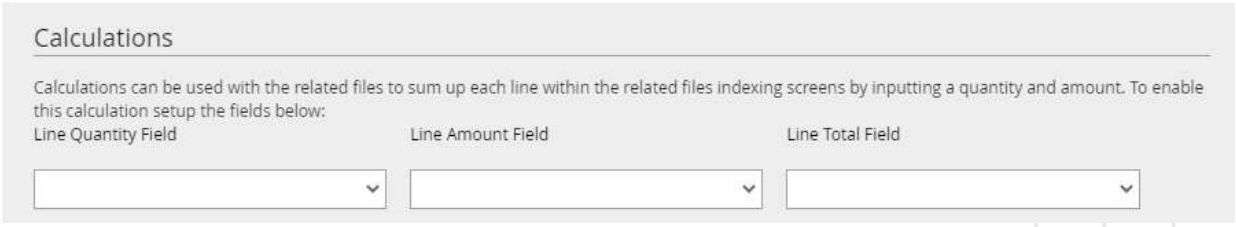



- **The feature in action:**

  An Accounts Payable implementation may have a subtotal, shipping, and tax field. The subtotal is usually the total of the line items of the invoice. The invoice amount is the total of the line items plus the shipping cost and tax. Using a calculation field, FileBound can automatically calculate the invoice total by combining the other three fields.

  **Note:** Calculations will replace the quantity, amount, and line total selections that were previously configured in Related Files The previously configured values will be converted as the Line Quantity Field * Line Amount Field on the selected Line Total Field in the related project. You should review the configuration of your accounts payable projects following this release as there are likely several workflow optimizations that will now be possible.

  *1: This Configuration section is moved to the index field in Version 8.*



# Updates to E-signature Integrations

## New integration for HelloSign

We've added a built-in integration to send documents to the HelloSign e-signature platform from the Web Viewer using workflow. A separate account with HelloSign is required. When enabled, users are able to initiate HelloSign signature requests from the document viewer.

# Updates to Web Viewer

## Drag-and-drop file creation

Adding documents with drag-and-drop into the viewer now opens the file creation screen, which will guide users through the process of creating a new file and adding the appropriate index information before documents are added. This improves the data structure of the system by ensuring a consistent metadata structure is being applied and documents are not lost to empty/blank files.

## Document grouping

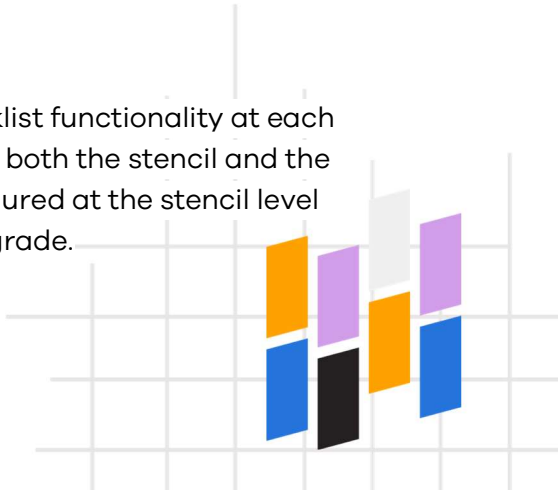
Users are now able to group single page TIFF-formatted documents into a document group in the Web Viewer. This will display multiple pages as a single document node in the file tree. Additional pages will be visible in thumbnail view in the document pane. This improves the user experience of finding/viewing distinct documents in the file tree. Document Grouping is not enabled by default and must be enabled for the entire site.

**Note:** When enabled, this setting will automatically group documents that were previously added to FileBound via the indexing queue, as long as they were also indexed into one file and divider. Pages that were split inside of the file may no longer be displayed as a grouped document. The grouped settings were applied by the indexing queue beginning in version 7.0—documents added in previous version will not be grouped. Prior to implementing this setting, review and test projects that made significant use of the indexing queue. Please engage Professional Services to assist in the removal of previously established document groupings.

# Updates to Workflow

## Checklists configured in connections

To simplify checklist configuration, we've consolidated the checklist functionality at each connection rather than allowing users to configure checklists for both the stencil and the outgoing connection. Checklist items that were previously configured at the stencil level have been duplicated to each task connection as part of the upgrade.



## User lookup term

We've added a new term to the workflow configuration called "user lookup". This allows you to configure a workflow to assign the appropriate user by comparing the routed document's index information to the user fields.

- **The feature in action:**
  In an approval workflow, you want to automatically assign a user based on the department and location. Using this stencil, you can tell the workflow to compare these index fields to the user fields that contain this information to assign the approval. Approvals can be assigned to the first user found that matches the criteria or to all the users found.

## Error Report logs when assignable steps use the default user

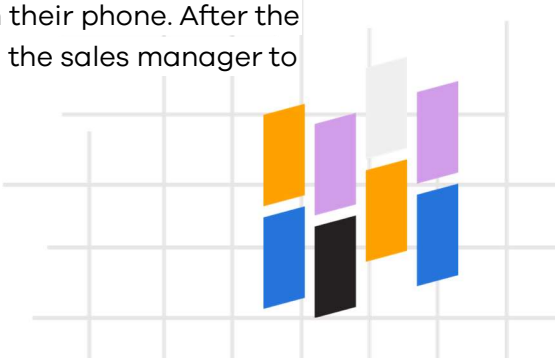
The assignable step makes it easier to build complex workflows. When the user isn't matched correctly, they can be difficult to troubleshoot. We've made it easier to track down what is happening in workflow by adding new logging for assignable step actions that are assigned to the default user. In addition to logging when the default user is selected, workflow will also track the results of the configuration that didn't match to specific users.

## Add anonymous form stencil

The anonymous stencil gives you the ability to assign a web form to be completed by an external user as part of a workflow process. An anonymous session is started from a web portal form when the authentication method is set to "anonymous". The form information is stored for that user and can be used to populate information on the assigned form in the workflow process.

The anonymous stencil is used to interact with users via the form portal. This supports several different use cases such as: completing additional forms, presenting the user with a confirmation page, routing users to different forms based on their responses, populating internal information to the external session or asking for users to upload additional supporting documentation or a red-lined contract via a secure portal that also triggers the workflow to move appropriately.

- **The feature in action:**
  A potential customer fills out and then submits a sales inquiry form from your website. The form is assigned to a sales manager to review the request. With an anonymous stencil, the workflow can now include a step where the customer is sent an email with a quote document attached. The customer clicks on a link in the email and can upload the signed document from the camera on their phone. After the customer submits the form, a workflow task is assigned to the sales manager to notify them that the quote is complete.



## Cancel action is logged in workflow status report

When workflow tasks are cancelled by administrators, the completed action will be updated to indicate that a task was cancelled, making it easier to track who and when tasks were removed from workflow.

**Note:** The cancelled action will not be logged prior for items cancelled prior to version 8.0.

## Workflow status report

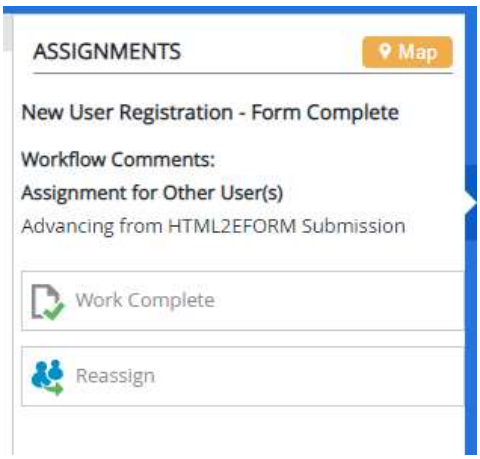
We now log the task button used to start a step and complete a step. On the workflow status report, users will see two new columns: "Previous Step Action," and "Completed Action". Previous Step Action is the task button that the user clicked on before the step was started or the "Arrival Action." Completed Action is the task button that the user clicked on the complete the step. The Completed Action will be blank if the step hasn't been completed.

**Note:** The Completed Action column will not be populated for work items completed prior to version 8.0. The Previous Step Action will not be populated for work items completed prior to version 7.5.

## Workflow assignment management

Users with this right can now update the due date of assignments from the assignments page. The due date functionality was previously only allowed by system administrators. This makes it easier for assignment managers to navigate workflow processes.

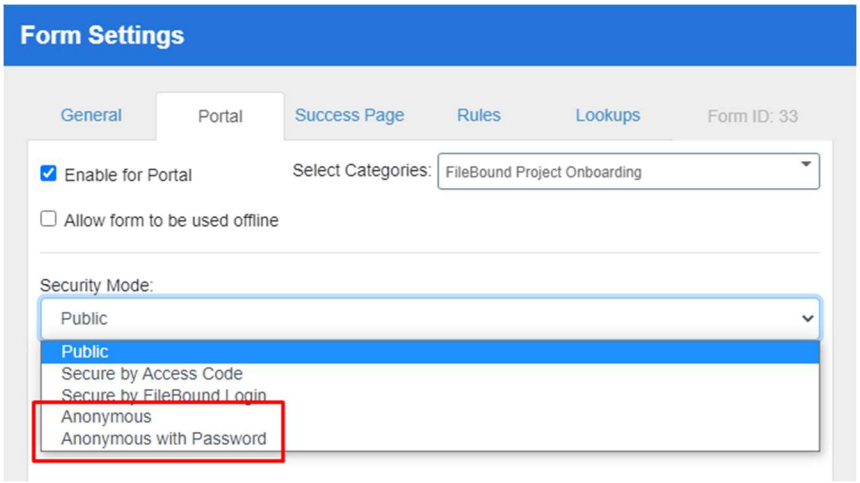
Users with this right can view and complete workflow assignments for documents directly in the Web Viewer. This makes it easier to manage workflow tasks of other users. When a user opens a routed item in viewer with workflow activity that is NOT assigned to their own user, the assignments panel indicates: "Assignments for Other User(s)".



# Updates to Forms

## Anonymous form

We've added two new authentication methods for the Forms portal: "Anonymous" and "Anonymous with Password". When enabled, users will be prompted to enter their email address and if enabled, a password to begin a new anonymous form session. This creates a temporary user account for the form and email address/password. This gives FileBound the ability to securely recall the information they have entered on the form and send it back to them later in a workflow process. This could include the next form in a series of forms, a packet of forms that are submitted at the same time, or even a new form that is generated hours or days later as part of a larger workflow process. Along with the workflow functionality, an "Anonymous Portal" form creates a much more robust experience for interacting with users outside of the parent organization.

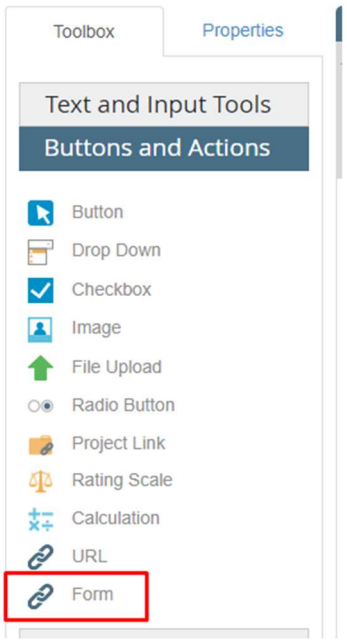



## Form link

When a form has been enabled for the portal with the anonymous authentication method, a new type of object can be added to forms called a "form link". This object allows you to create a custom menu of additional forms that must be completed before the parent form can be submitted. When a form link exists, the linked form must be opened and completed or the user will not be able to submit the parent form. The form link can be configured to display the status of the linked form.

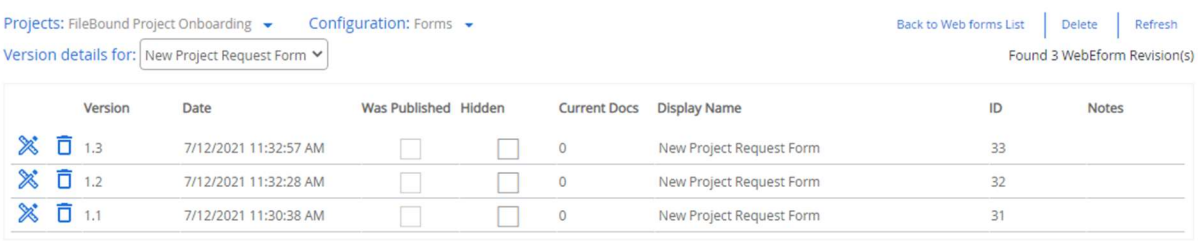
Linked forms can also have one of two new submission types: "Save Draft - Done," and "Save Draft - In-Progress." The Save Draft - In-Progress option saves a user's current work but does not enforce form validations and returns the user to the parent form with the linked form status of in-progress. The Save Draft -Complete option saves a user's work, enforces all form validations, and returns the user to the parent form with the linked for status of complete. This also enables the user to complete the submission of the final form.

Linked forms must use the Save-Complete option for the save button instead of the standard save button type. This ensures the session behavior links the parent and child forms together. Forms can be configured with either the parent/child multi-form relationship, or they can be chained together so that Form A routes the user to Form B when completed. Both options are supported with the anonymous form authentication method.



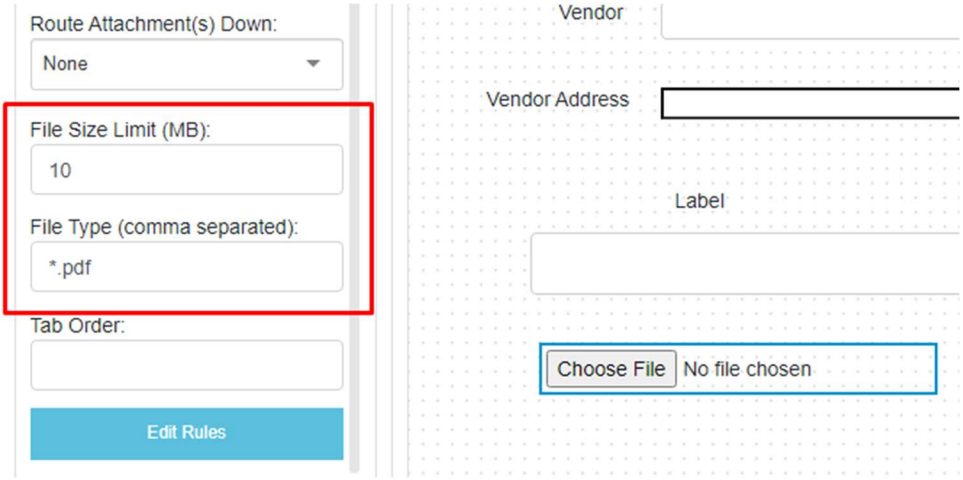

## Form versioning

With FileBound 8.0, we've made it easier than ever to manage web forms by automatically retaining the versioning history as users make changes to the form over time. As a form evolves over time, FileBound retains the complete history of changes made to the form automatically. When all the changes are completed, the user can then publish that version of the form to make it live. Like workflow versioning, forms that are generated in a particular version of a form are retained in that version. This means that documents are not updated as form changes are made, and the legal retention requirements of older documents are not impacted by new versions of the form.



## Option to limit uploaded document size and type

There is now an option to limit the file extension types and the maximum file size that is allowed to be uploaded via the File Upload control on a form. An error will occur when a user tries to upload documents that do not match the allowed extension types or exceed the size limit . Multiple file types can be configured for a single file upload.



# New Features in FileBound Connect 7.0

With FileBound 8.0, we also made some changes to Connect to improve the experience and usability.

**Note:** Connect Version 7.0 is required for FileBound Version 8.0

## Web form menu added to main UI

Access forms for a project on the Forms Menu right from the Connect user interface. Open a new form for a project and create a new file using the form. Pre-populate mapped field values when adding a form to an existing file.

## Bulk document export

After completing an index search and selecting files, users will be able to download the entire contents of a file using the document export screen. This will download all documents from the selected files to the configurable export folder on the local computer in a zipped file.

**Note:** This is limited to 1,000 documents in one export action.

## Generate structured Word forms from FileBound Drive

From FileBound Drive, users can now select the option to generate a structured form directly to the opened file. Users can generate the template document and then open it and edit it locally while changes are automatically saved back to FileBound.

## Open viewer to selected divider or separator

From the search results screen, if a user selected a particular divider or separator to search, the viewer will open automatically to that location in the file.

# New Features in Importer

## Active Directory user sync module

Administrators can now select which Active Directory groups to sync using an Importer configuration. This module also gives users the ability to create custom mappings between the Active Directory fields and the FileBound user fields. The module can be run as a scheduled windows task to give administrators more control over when and what to import from Active Directory.

## CSV user update/import module

Administrators can now import and update users from a CSV file using the importer module. Administrator can map CSV columns for each of the User Fields. Users are automatically created or updated based on matching the mapped username. Password mappings are ignored for pre-existing users. Users can be added to multiple groups by duplicating the user row and designating different groups names for each row. Users cannot be removed from groups using this module.

## Upland InterFAX fax import module

Automatically import faxes received by an InterFAX account. Fax metadata can be mapped directly to FileBound files.

# Other Feature Updates

## General

- Improved usability of divider/separator selection menus in the primary UI

## Administration

- Added notes to the SAML Configuration section of the Main Options - Security tab
- Added support of the pipe (|) symbol as an OR parameter for $$USERCUSTOM$$ variables in File Security
- Added columns for Custom1 - Custom6 to the user export
- Added Connect integrations to the Integrations tab in Main Options for centralized Connect port/integration settings

## API

- Added User Picklists object to REST API
- Added support for Parent Stencil level checklist object to REST API
- Added support for Task Checklist object to REST API
- Added File Comments endpoint to REST API
- Add Document Comments endpoint to REST API

## Assignments

- Users can now search by project for ad-hoc assignments

## eSignature integrations

- Added the ability to select an email or signing group when configuring the DocuSign stencil in the Workflow Designer
- Added the ability to retrieve integration-driven signature information

## Forms

- Added a “Fit to Contents” option for multi-line text controls in the Forms Designer—when this option is selected, the height of the text field will adjust to fit the contents
- $$DATE$$, $$USER$$, and $$USERID$$ can now be used as replaceable text variables for the default value on single line and multi-line text controls
- Added an option in Form Settings to allow or prevent the submission of a form by pressing the enter key
- Added an option to clear date fields
- Added an “any response” option for project link fields when creating conditional rules in the Forms Designer
- Divider drop-down lists in the Forms Designer are now filtered based on the selected separator

## Index fields

- Modified project link fields to return the most relevant results. When searching in a project link field, results are displayed from the key field and then the visual field in the following order: exact match, starts with, and contains. Only the first 50 results will be displayed. See Project Link index fields for more information.
- When a lookup has been configured into a drop-down, lookup values will now take precedence over pre-configured/option list values.
- The last searched value for project link fields is now retained on the search results grid and in the Windows Viewer line items panel, which is consistent with other screens.

## Indexing Viewer

- Disabled multi-key search in the Indexing Viewer

## Mobile

- Improved the experience of loading additional pages for multi-page PDF documents

## Reports

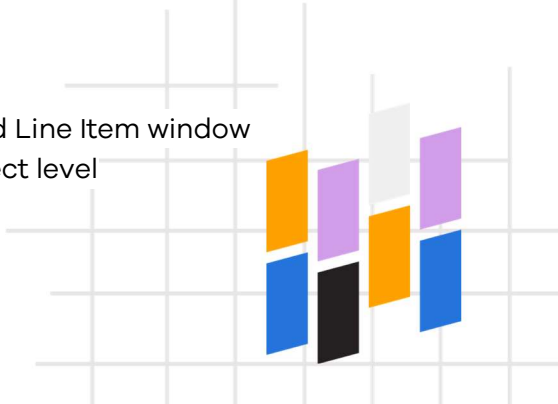
- Added Previous Value and New Value columns to the Activity Audit Log report. This creates a detailed audit trail for changes made in the Administration menus.

## Search

- Users can now search for an underscore character using a [ _ ]. An underscore without the square brackets is used as a single wildcard character.
- When a user doesn't have rights to a related files project, Search will now load and not include the additional related files fields, rather than displaying an error.

## Web Viewer

- Improved upload speed of multiple documents by adding additional compression during upload process
- Added visual indicator of progress as Web Viewer processes multi-page documents uploaded to viewer
- Added a horizontal scroll bar to the Related Documents and Related Files panels
- Column widths are now saved after they have been resized in the Related Documents and Related Files panels
- Added support for saving edited XLSM files
- Added the ability to clear out date index fields
- Redesigned the Advanced Line Item window
- Added support for cascading index fields in the Advanced Line Item window
- Added support for popup plug-ins configured at the project level



- Implemented virtual infinite scrolling in the File Tree
- Added a reset button to Settings to reset user-modified menu sizes back to default sizes
- Searches in the Advanced Indexing Window GL description field are now "like" searches and wildcard searches are allowed
- Improved usability of divider/separator selection menus
- Implemented search capabilities for cascade fields
- Implemented search capabilities for option list fields on the File Search
- Prioritized document loading ahead of other panels to improve the user experience of loading the Web Viewer

## Viewers

- Updated highlighting in the Windows Viewer File Tree to a more noticeable color
- Updated the Web Viewer Advanced Indexing window so that tabbing from the last field navigates to Add rather than Save
- Implemented auto-save for document rotations in the Web Viewer
- Web Viewer File Details are now automatically refreshed to reflect changes to index information resulting from a workflow.
- Revision descriptions can now be edited in the Web Viewer Revision panel.
- Users can now view and edit document revisions listed in Web Viewer.
- The Web Viewer now retrieves assignments from the same document queue when pulling the next available queue assignment.
- Changed the Full Text Search page highlighting in the Web Viewer to only highlight pages that match the search criteria. Previously, it repeated the search for individual words across all pages. This will reduce false matches.
- eForm data field names in Web Viewer view/edit forms are no longer case sensitive.
- When exporting a document from the Windows Viewer with an annotation that has not been saved, the annotation now shows on the document.
- External document links opened from the Windows Viewer now open in a browser.
- When opening multiple items from the Search Results page in the Web Viewer with the results sorted by a date field, the Web Viewer will now sort dates chronologically instead of alphabetically.
- When interactive revisions are enabled, the viewers will now prompt the user to enter a description for the revision when a document is replaced.
- Addressed duplicative loading code to Improve the loading speed of Related Files and Related Documents panels in the Web Viewer

## Workflow

- Added a success and failure route option to the E-sign stencil. Complete but unsigned eSignature statuses will follow the failure routing
- When configuring conditions for Decision stencils, the "In" operator now only shows when the left or right side of the condition is a list.