BundlePro V3.2

New Features and Updates - Feb 2024

Fileman / BundlePro

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Overview

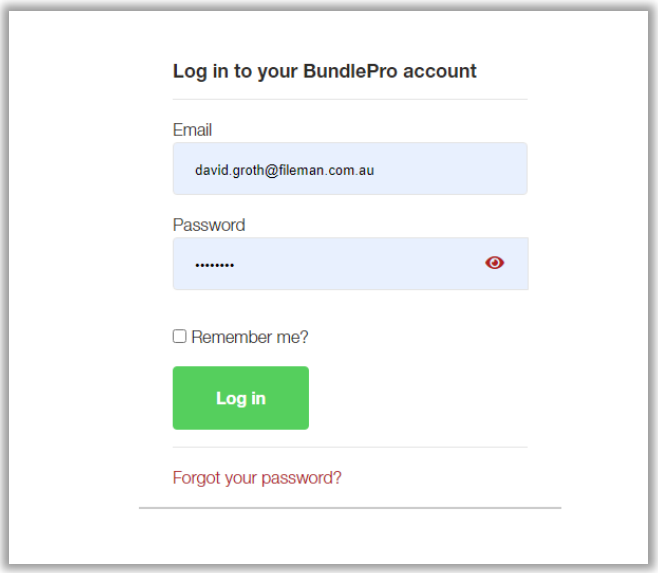
BundlePro V3.2 Has been updated to include many new features and improved functionality. This document will highlight all major changes from previous versions.

There is also a lot more minor new features that are not listed in this document, such as loading spinners when waiting for pages to load, improved UI environments and faster loading of certain tasks.

Log-in Style

Reformatted Style of Login Popup

The login pop up window has been restyled. Users can now also see their password with the new eye toggle.



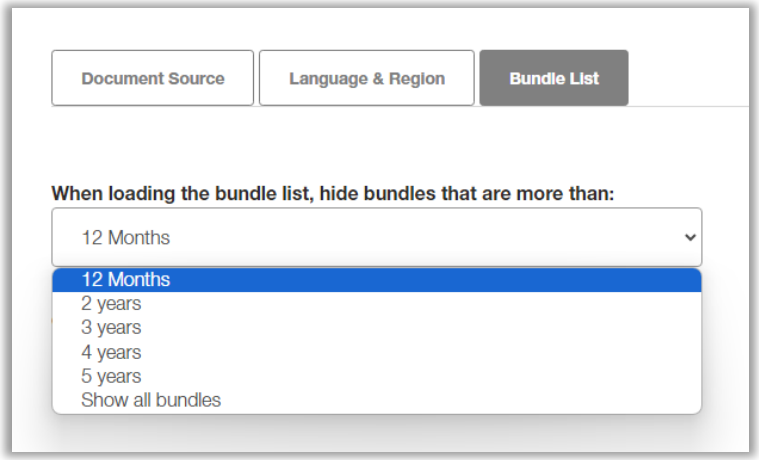
Bundle List

New ‘Limit of Bundles’ Shown Feature

New limit of visible bundles in ‘bundle list’. The admin can set limits on how many bundle will be displayed.

Changing the 'Limit of Bundles' Setting

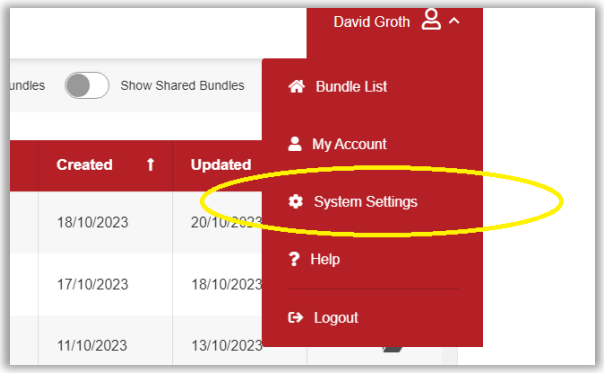
The new setting is located in the new '**System Settings**' window (see further in this document). The text displayed will not appear if the bundles listed do not pass the set date. The default setting for this option is set to 'Show All Bundles'.



New 'System Settings'

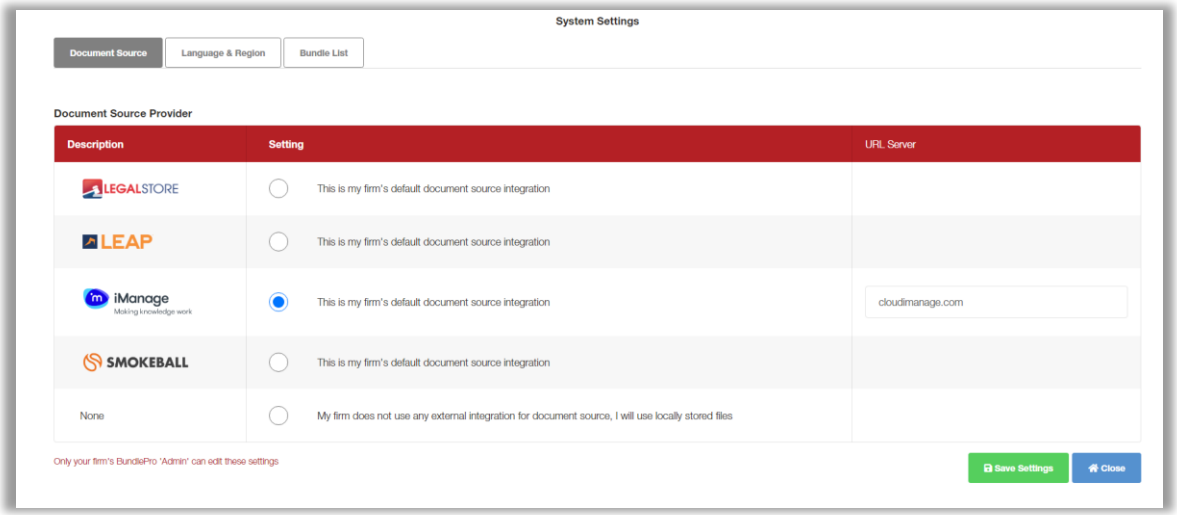
The System settings window. Access to change Document source, Language & region & Bundle List limits. All these setting can only be changed by the 'Admin' of the firm. Document source is set here at the firm level, whereas if there is a job using another source, then that job will default to the correct source without affecting the firm level source.

Accessing ‘System Settings’ from Main menu dropdown



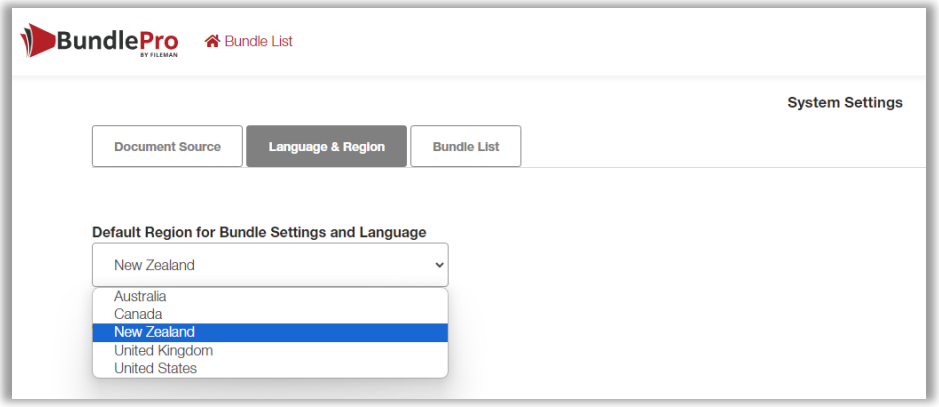
Third Party Integration Settings

Here, the ‘Admin’ can preset their third-party integration. By default, for now, the system will be set to LEAP.

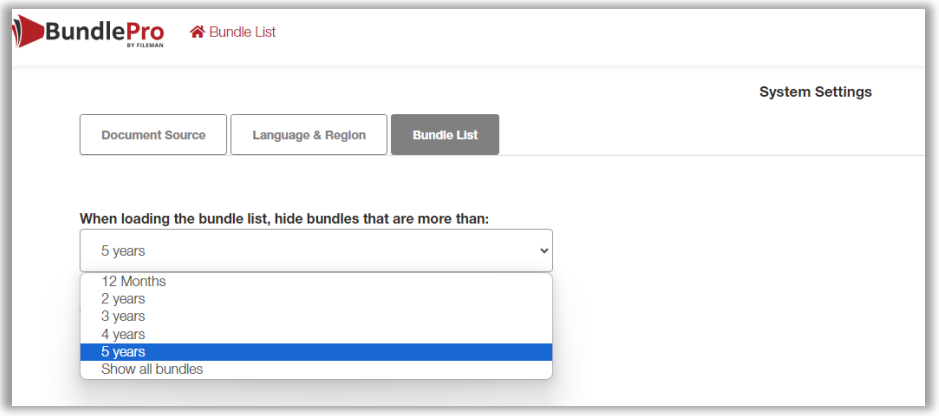


Language and Region Settings

The setting here will determine what index settings are shown when creating a new bundle. For example, New Zealand has different index styles and settings than Australia and the United Kingdom.

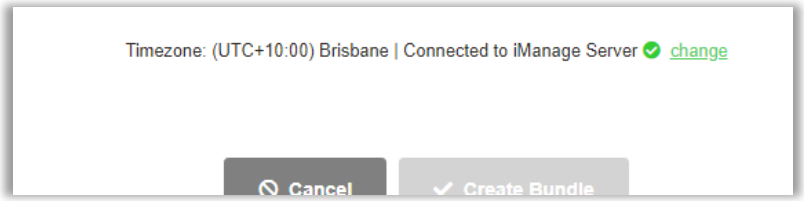


Changing the 'Limit of Bundles' Setting



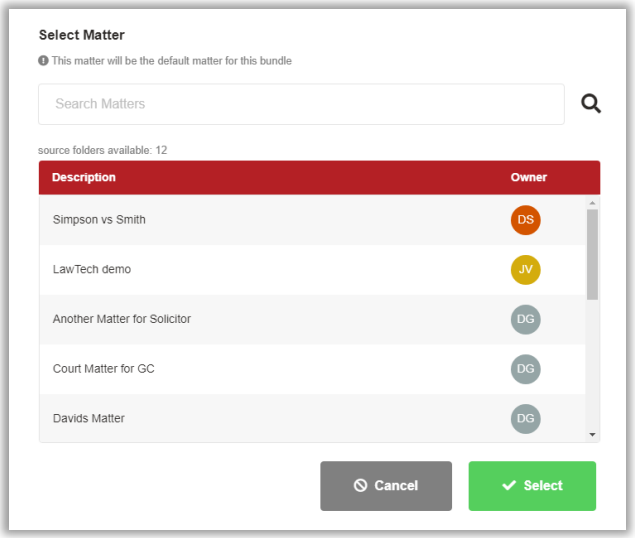
Create Bundle

The 'Create Bundle' pop up for has been reformatted to allow a more cleaner user interface. It now also includes more descriptive text showing the user if connect to a third party, or if they desire to change any settings. The new design also lets the user create a new bundle without using a Third-Party matter.



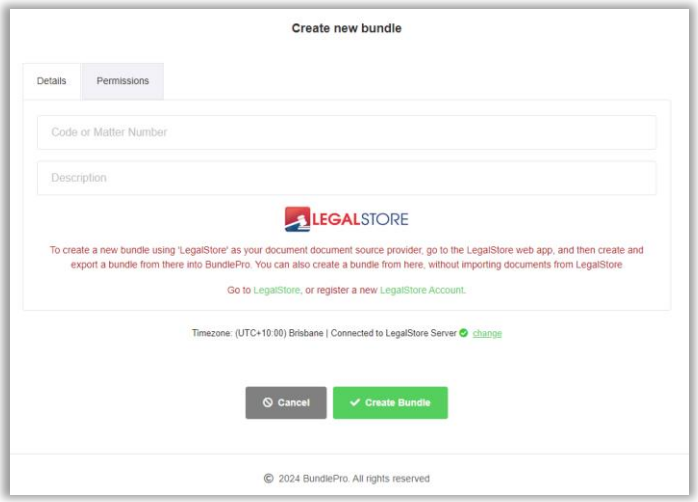
'Select matter'

The select matter pop up now includes the user that created the original matter from the third-party integration (where available).



Legalstore create bundle

In the create bundle pop-up, if your Third-Party provider is set to ‘Legalstore’ then the user is advised to go to Legalstore to create their bundle.



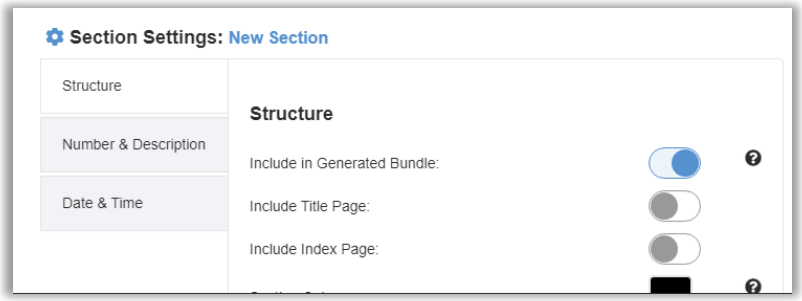
New ‘Workspace’ features

Changes to ‘Section’ settings

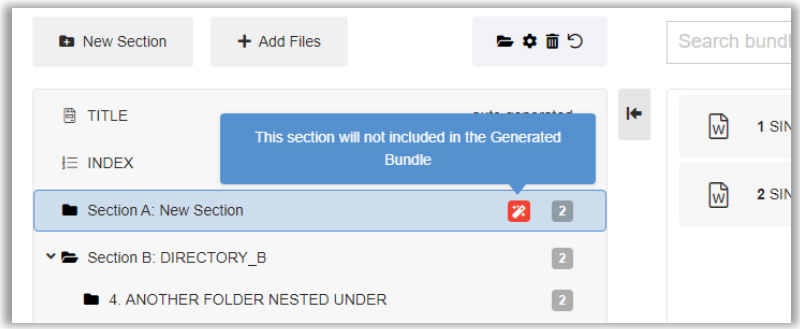
The pop up for section settings has been reformatted to allow a more cleaner user interface. Specific tasks are now categorized into tabs.

Include in Generated Bundle

New toggle to set if the ‘Section’ will be included in the final generated bundle or omitted.

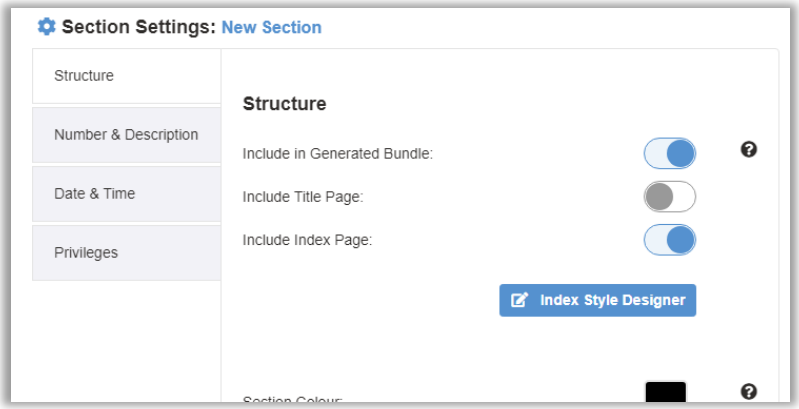


A new icon will be shown on the workspace if the section is not included.



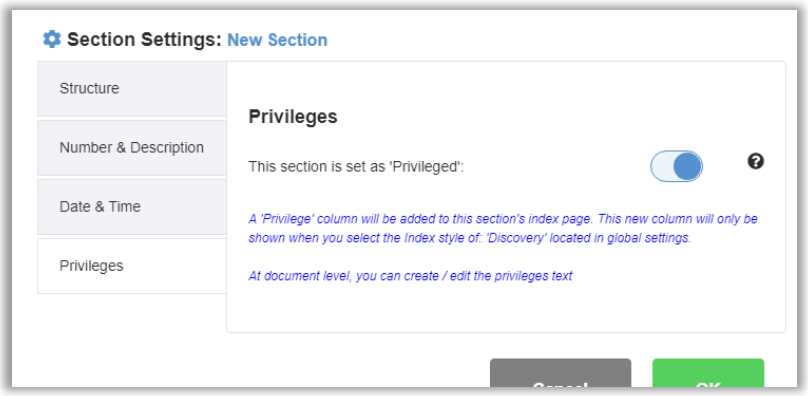
New ‘Index Style Designer’

New styling designer to allow user to format, Font sizes, Font Colours, Background Colours, Column Widths and Renaming of Column titles. (see more further in this document)

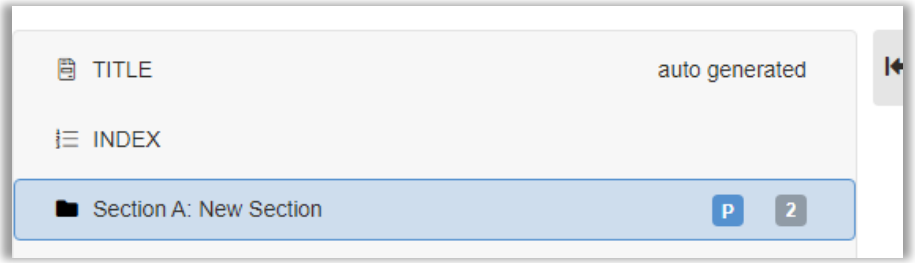


New ‘Privileges’ setting

New ‘Privileges’ will enable the privileges text box setting located in the individual document settings pop-up. This setting will only be shown if the country is set to New Zealand in ‘System Settings’. (see more regarding New Zealand settings further in this document)



If Privileges are on, then a new icon will appear against the Section in the workspace.



Changes to ‘Bundle Settings’

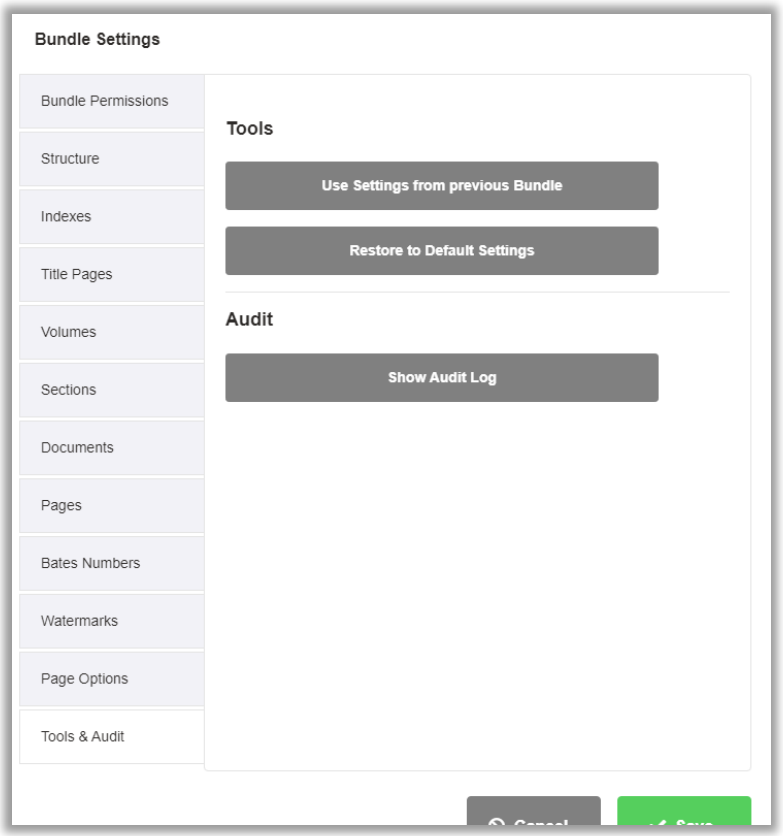
The pop up for bundle settings has been reformatted to allow a more cleaner user interface. Specific tasks are categorized into tabs, including the new ‘Tools’ tab.

New Description header of index styles

Upon selecting an index style, a new descriptive header will show the user the default style that will be applied upon saving.

New ‘Tools’ tab

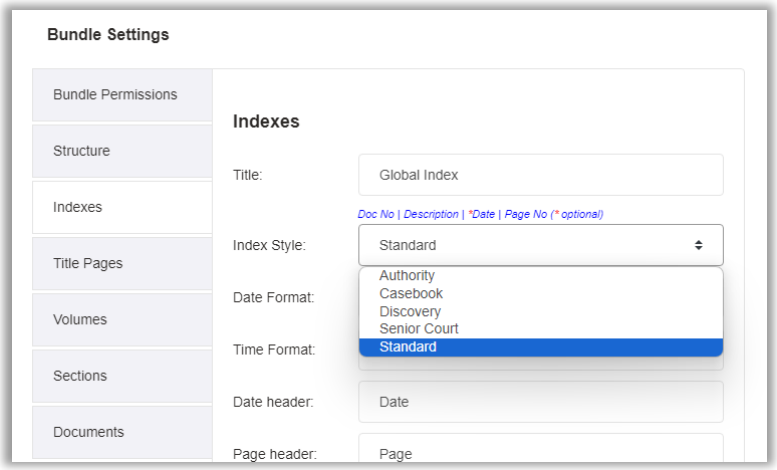
Tools have been moved to their own tab in the pop up, for a cleaner and a more user-friendly interface.



New Zealand Indexes

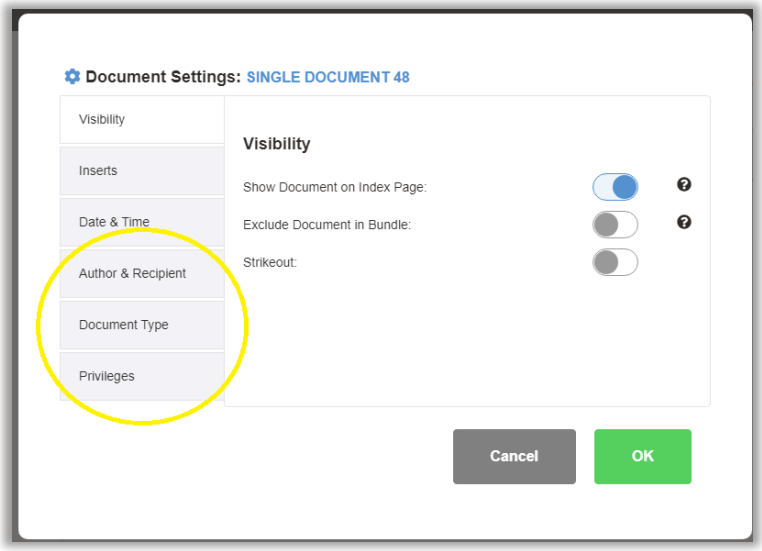
New ‘New Zealand’ Indexes

New NZ styles index. Some renaming of styles, and new formatting of indexes.

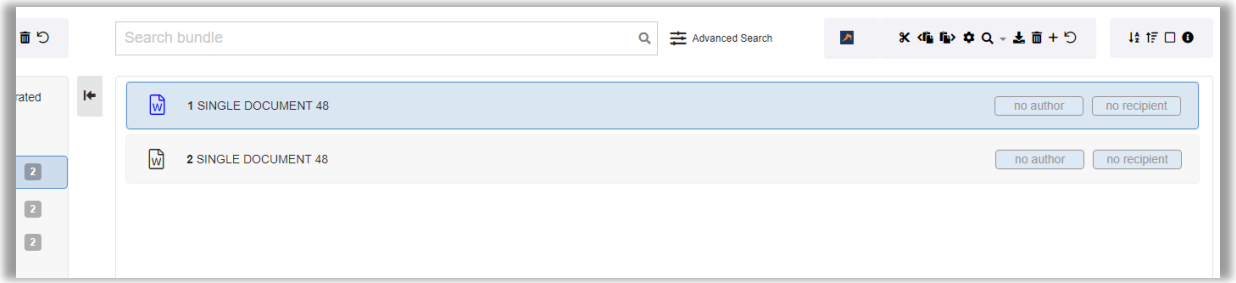


New Zealand 'Discovery' Index Settings in Document Settings

The discovery index includes new features. Namely: new tabs of 'Author & Recipient', 'Document Type' and 'Privileges'. These settings are accessed when the index design is set to 'Discovery'.

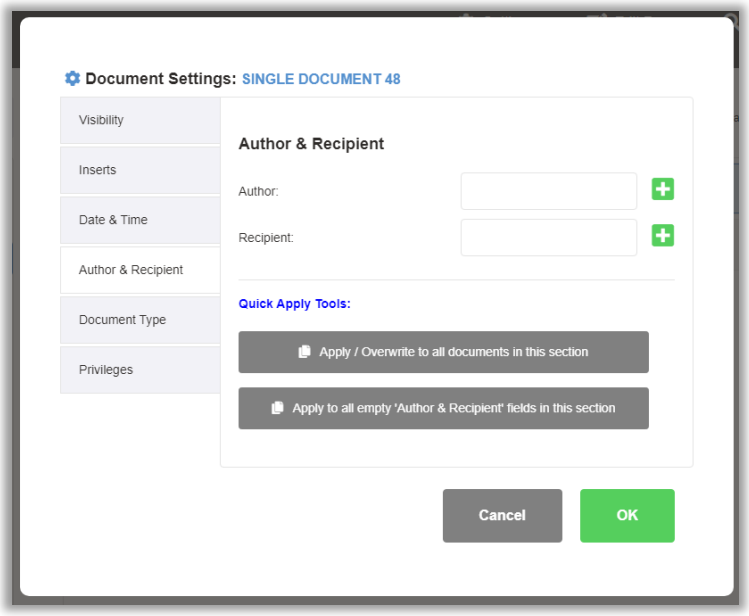


Some of new NZ features will also appear in the document list when enabled.



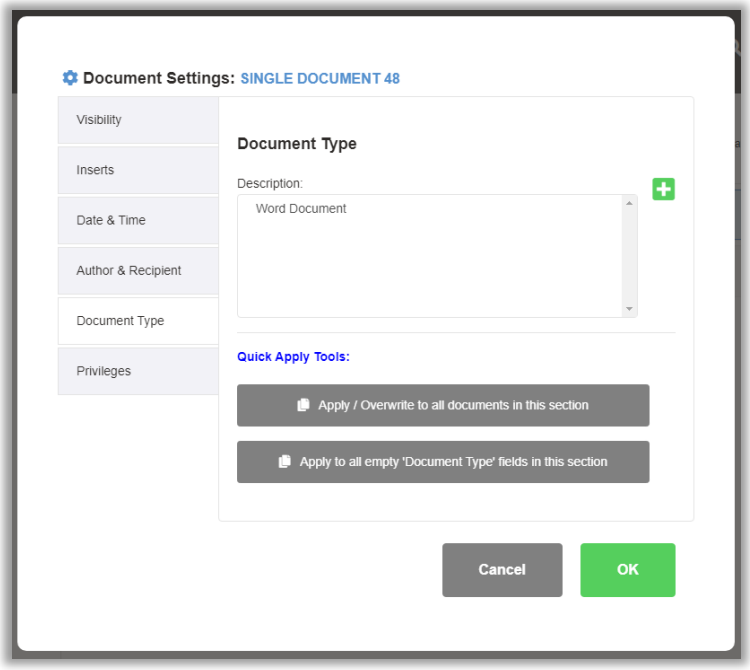
Author & Recipient

These new text fields are for the NZ Discovery index style. A user can add pre-set data for the '+' (plus) button / or enter their own text. (see further in the document regarding picking list feature)



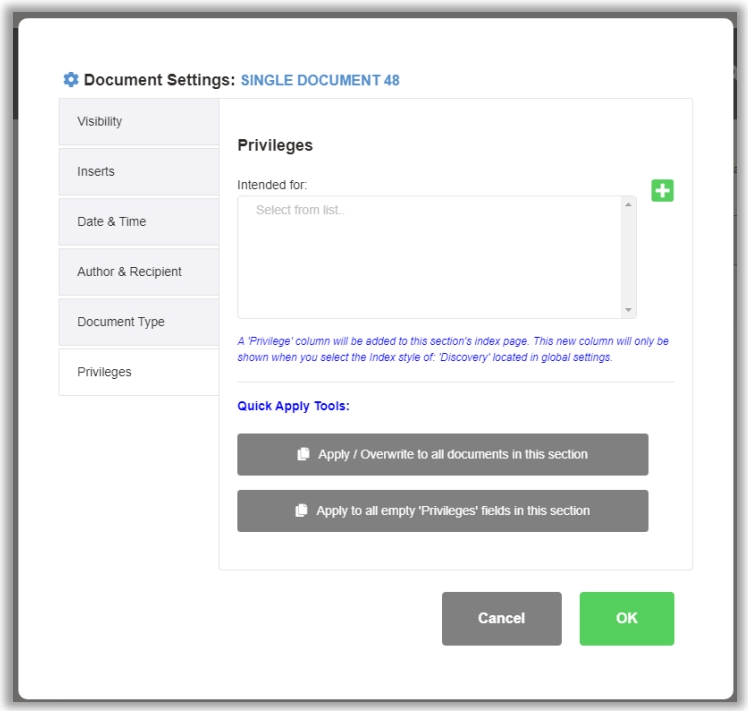
Document Type

This new text fields are for the NZ Discovery index style. A user can add pre-set data for the '+' (plus) button / or enter their own text. (see further in the document regarding picking list feature)



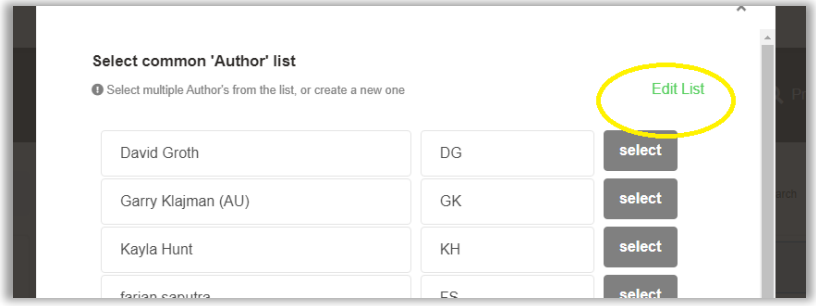
Privileges

These new text fields are for the NZ Discovery index style. A user can add pre-set data for the '+' (plus) button / or enter their own text. (see further in the document regarding picking list feature) To enable this feature, the privileges option must be turned on in the section settings.



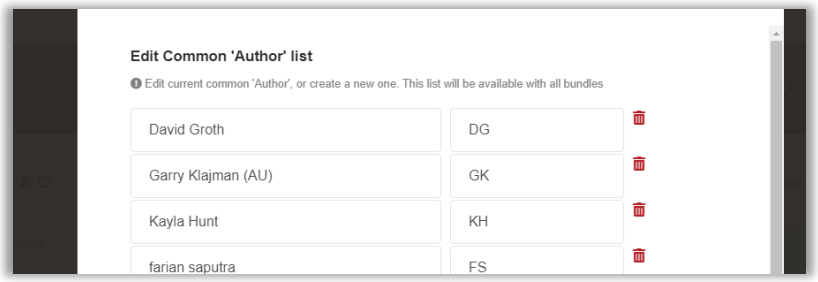
Picking List

A generic style 'Picking list' for the last 3 settings is shown here. This 'picking list' has ability for a user to add more shared values at a firm level. The data in the picking list is available to use on every bundle created.



Picking List Edit

Clicking on the 'Edit List' in the Picking List will take the user to the edit list pop-up, where the user can add new items or delete items.


Edit Common 'Author' list
Edit current common 'Author', or create a new one. This list will be available with all bundles
David Groth
DG
Garry Klajman (AU)
GK
Kayla Hunt
KH
farian saputra
FS

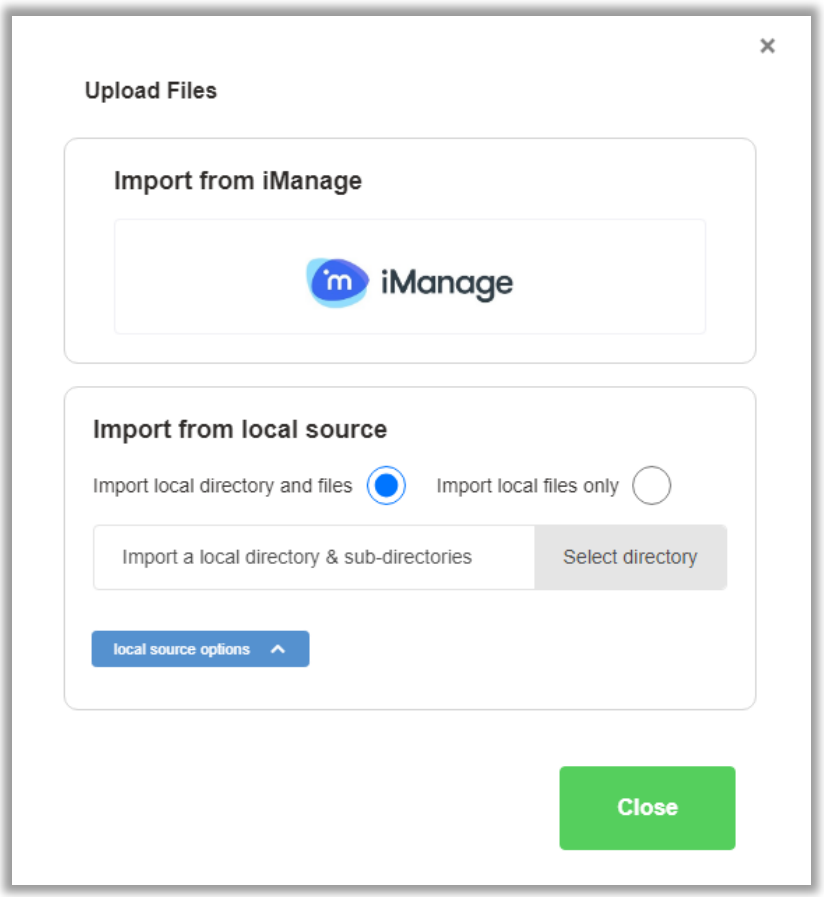
‘Uploading Directories’ and ‘Sub folders’ form a local source

In the workspace, the user can now upload directories and sub-directories to their bundle. They have the option to now choose if just from a directory or files only.

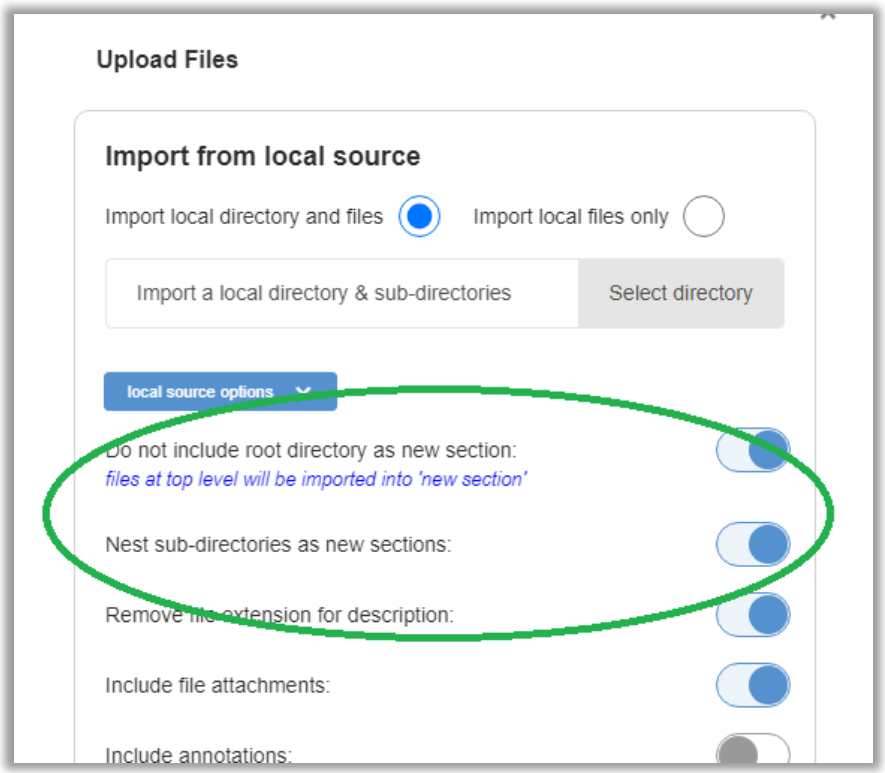
Under directory importing options, the user has the choice to either import all documents inside the directory with / or without, the root directory being included. All sub-directories will be created as sub-sections inside the bundle, along with the files associated with the directories.

The interface has also been cleaned up, with all options for local imports now located under the ‘local source options’ toggle.

New Import files Pop-Up



New Import Directories has new options to import with / or without the root directory, along with the option to nest the sub-directories or keep at same level without the section being created in BundlePro.

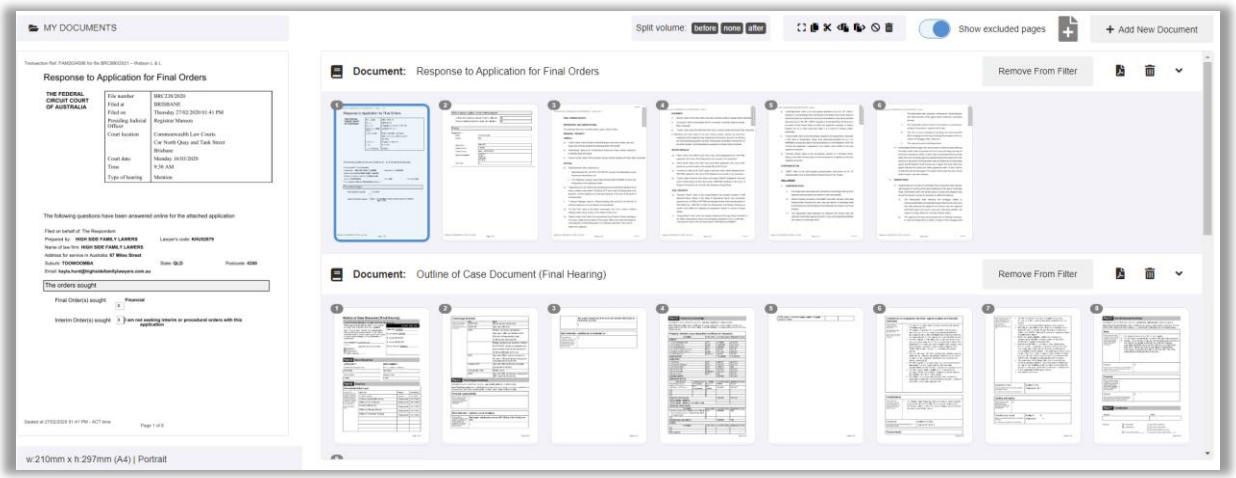


Edit Pages

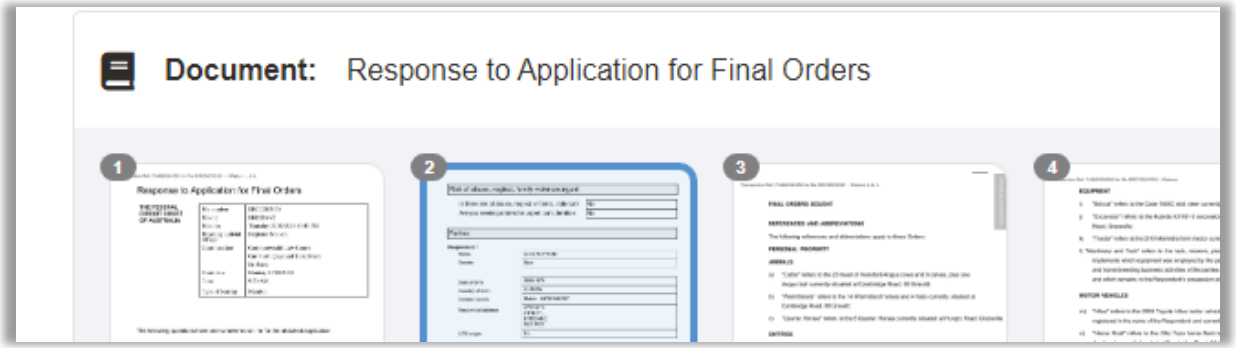
Some changes made to edit pages upon requests from customers.

Page Numbers in edit pages

Each document page now shows a page number. The page number is updated is you move the pages around.



Page numbering on each page

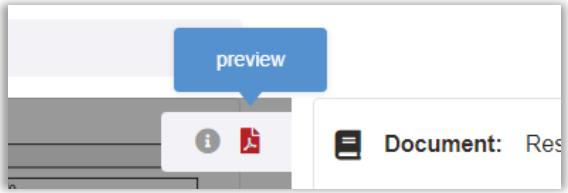


Back button to workspace in edit pages

The back button now returns to the correct place & section in the workspace.

Back button to Edit Pages from Preview Page

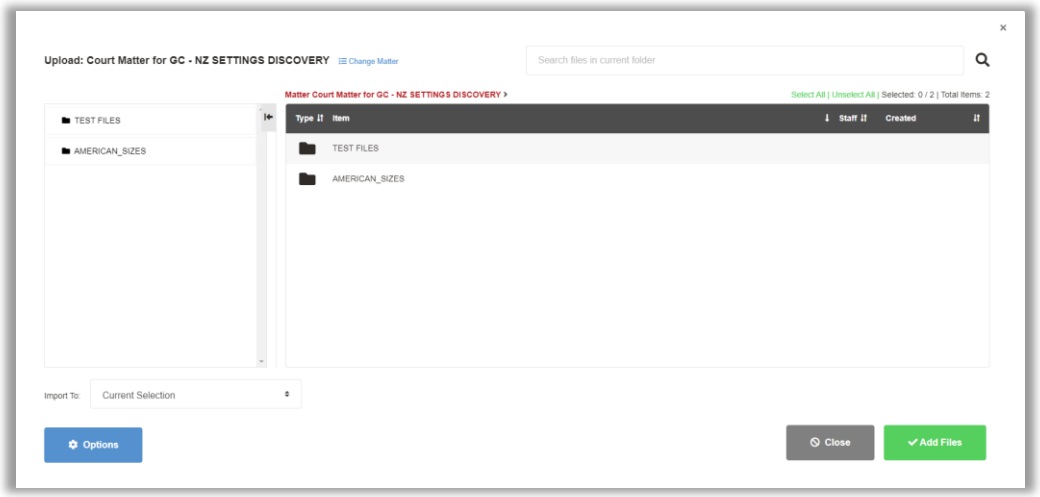
The back button now returns to the correct place in Edit pages.



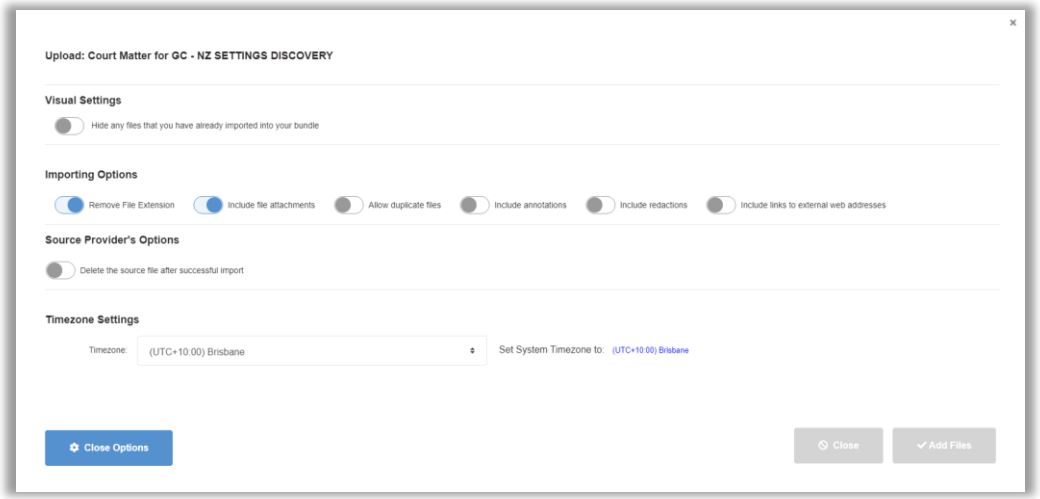
Importing third-party files (LEAP and iManage) changes

When importing third-party files from the workspace, the Import files pop-up window has now been cleaned up and due to more options being available, all options have now been moved to a full view page when clicking on the 'Options' button.

Redesigned Import files from third-party document source pop-up



Redesigned options view in pop-up

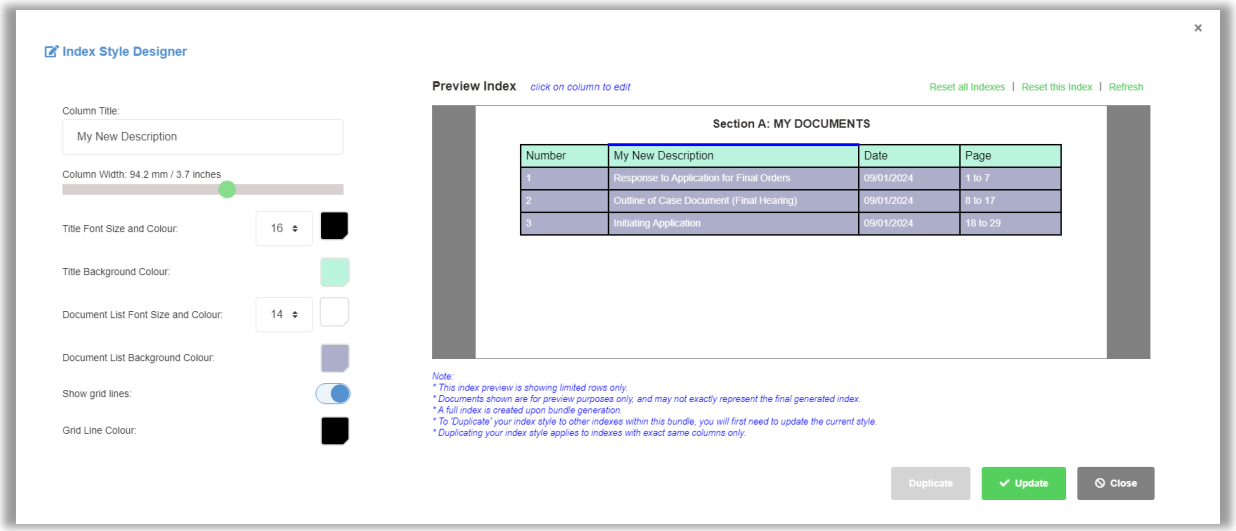


New Source provider option to delete files from source when importing into Bundle

Note: currently this option only applies to iManage and Smokeball

Index Style Designer

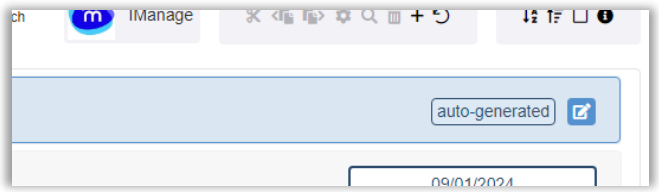
In the workspace, the user can now reformat the style of the index in the generated bundle.



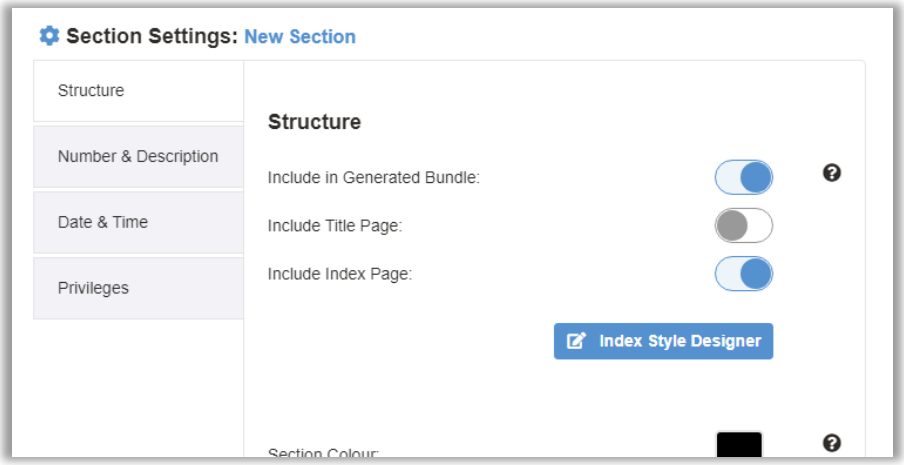
How to open

Access button to the 'Index Style Designer' tool is located in the section settings, under 'Include Index' option. There is also an icon button if an index is activated at section level.

When turning on 'Include Index' at section settings the Index row will have a new icon button showing to take the user to the 'Index Style designer' tool



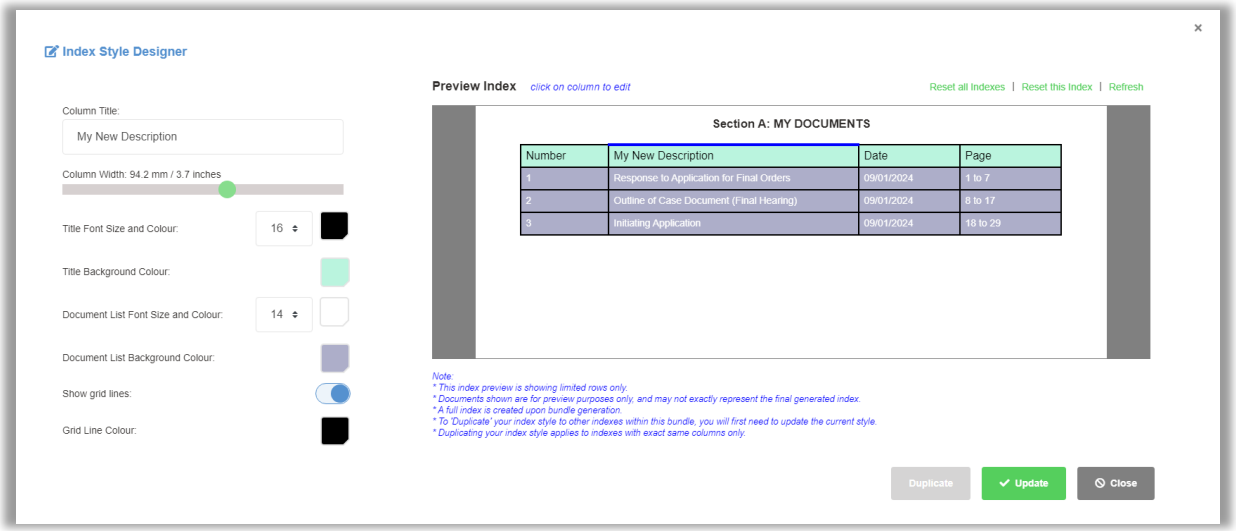
The Index style designer tool can also be accessed in the section settings when the Include Index is turned on



Changing the default Index Style

The new tool features the ability to change:

- Column Titles (click on the column to edit).
- Column widths (click on the column to edit).
- Title Background Colour
- Title Font Sizes and Font Colours.
- Document List Font Sizes and Font Colours.
- Document List Background Colour.
- Show Grid toggle.
- Grid colour.



Limitations

The 'Index Style Designer' is only available at section level, and not at a global Index Level, since each section can be customized to an individual index style, and some index designs can have more columns or fewer depending on the style chosen in bundle settings.

Duplicate Feature

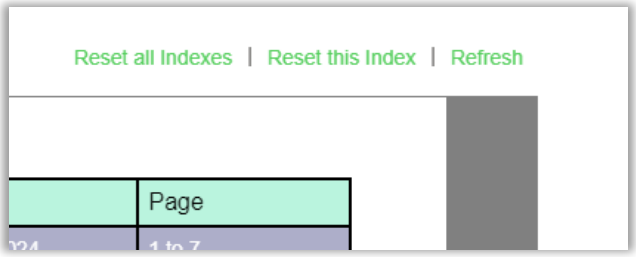
Considering the limitations outlined above, the user can '**Duplicate'** their design and apply it to all other indexes within the bundle, where the index style matches the same column count and column titles. The 'Duplicate' feature applies the design to each section even if the 'show index' option for that section is turned off.

Output of Indexes

The generated bundle will apply the new styling. Even if the user turns off the indexes at section level, the designs are not lost and will still be applied to the Global Index.

Resetting / deleting Index Styles

The design tool has the option to reset either ‘All’ styles applied to all the indexes that the user has created, or just the one they are working on.



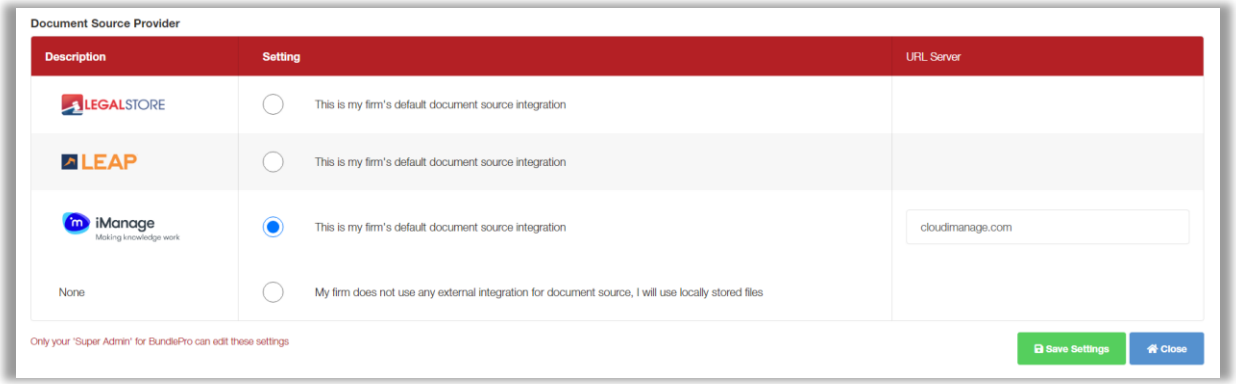
iManage third party Integration

It is assumed the user will have a valid iManage account and has setup their iManage matters correctly and with correct security access for their folders and documents.

For full instructions, see document “Using BundlePro and iManage”.

Activating iManage in BundlePro

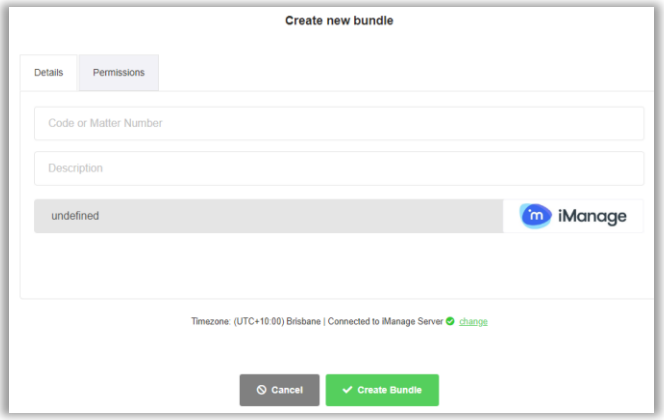
Just like BundlePro’s LEAP integration, iManage as a document source provider, has now been integrated. This integration is set in ‘System Settings’ and can only be access/changed by Admin in the firm.



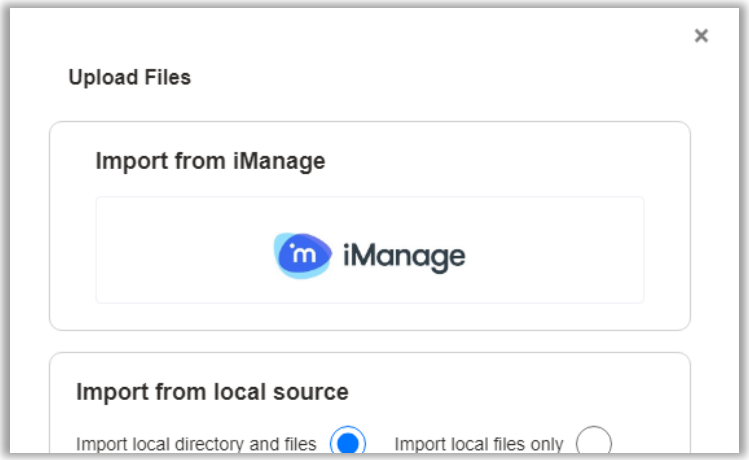
Create a Bundle

iManage replaces LEAP where needed when iManage is set as the default third-party document source provider.

Selecting iManage when creating a new bundle

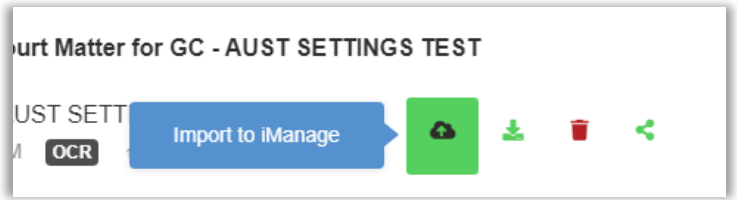


Selecting iManage documents in the workspace



Importing generated bundles to iManage

Just like BundlePro's LEAP integration, you can import your generated bundle back into iManage. The import will create a new folder in iManage called "BundlePro Generated Bundles". Here the imported file will be renamed with the imported date added to the original matter name.

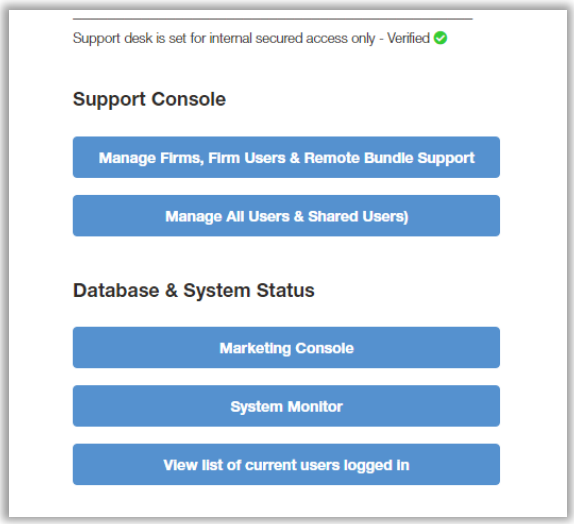


Smokeball third party Integration

Even though, in basic format smokeball is working with BundlePro, it will be hidden in this 3.2 release. As we are waiting on further development and changes in the API's.

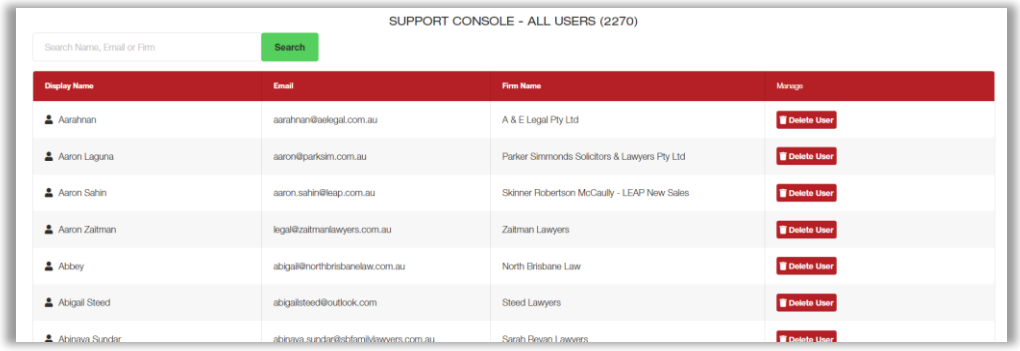
Support Console new features

New renaming of support console menu, with added new button to 'Manage All Users & Shared Users' page.

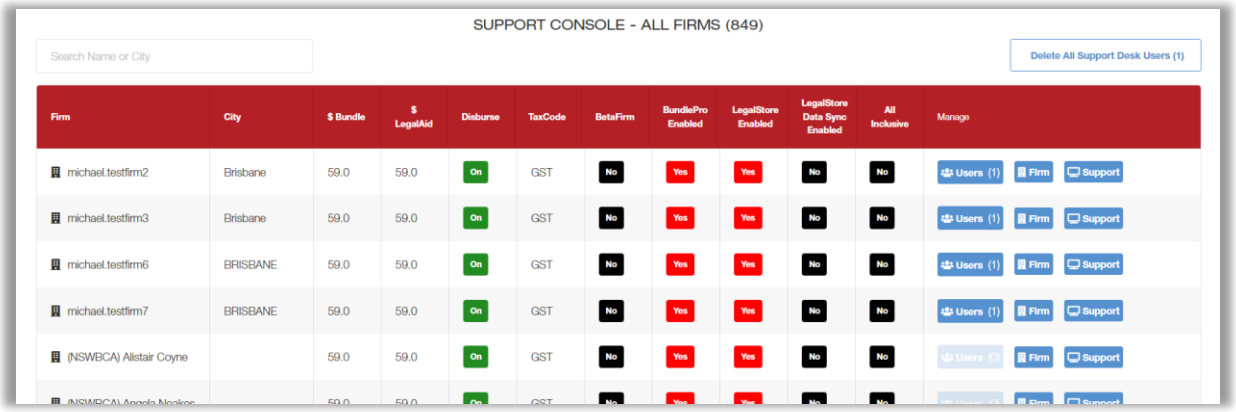


Manage All Users & Shared Users' page

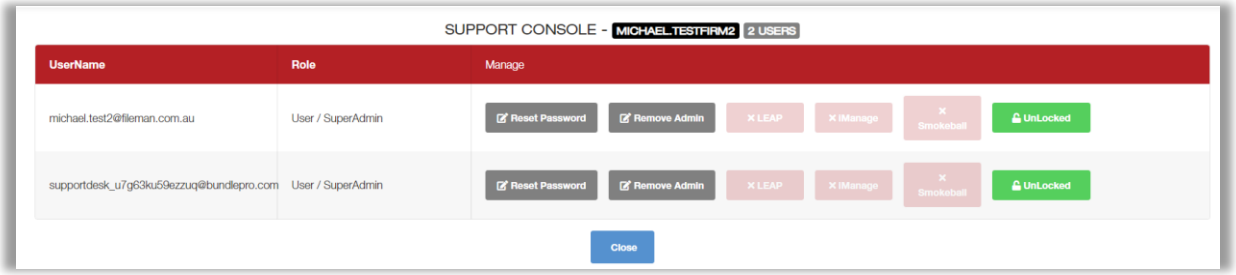
All users can now be managed from this new page, including all shared users that are not a user linked to a firm. Support desk can now deleted shared users.



Legalstore added to main support console page



Added ‘unlink’ buttons iManage and Smokeball to users page



Bug fixes and Issues resolved for 3.2 release

The following list has been imported from Azure Development Ops tasks workboard ***for BundlePro only***. And only shows resolved bub fixes and issues resolved form previous testing.

ID	Issue Title	Assigned To	State	Area Path
614	Fix saving spinner alignment on doc settings modal when saving multiple items	David Groth	Resolved	Fileman\Bundle
241	Volume Split via Page Number	David Groth	Resolved	Fileman\Bundle
298	Edit Page Preview	David Groth	Resolved	Fileman\Bundle
419	Page Numbering and searching in Edit Pages	David Groth	Resolved	Fileman\Bundle
336	Support Console Update	David Groth	Resolved	Fileman\Bundle
244	Double click date column	David Groth	Resolved	Fileman\Bundle
233	Bulk Folder Import from Local Directory	David Groth	Resolved	Fileman\Bundle
539	Apply/overwrite to all documents in section not working	David Groth	Resolved	Fileman\Bundle
540	Apply to all empty document type fields not working	David Groth	Resolved	Fileman\Bundle
542	Sometimes 'Show Document on Index Page' turns off when opening the document settings	David Groth	Resolved	Fileman\Bundle
464	Integrate new method for Smokeball login for BP / Using new firm level API token	David Groth	Active	Fileman\Bundle
535	Author disappears when closing picking list	David Groth	Resolved	Fileman\Bundle
538	Document type not adding to section	David Groth	Resolved	Fileman\Bundle
547	Edit Index Layout: document list background colour only changes the first document	David Groth	Resolved	Fileman\Bundle
545	Changing Countries affects current bundles	David Groth	Closed	Fileman\Bundle
536	Cannot add/edit picking list for Author (missing textbox)	David Groth	Resolved	Fileman\Bundle
537	Caps Lock and Password Visible toggle at login	David Groth	Resolved	Fileman\Bundle
522	setup POC Bundle for iManage	David Groth	Resolved	Fileman\LegalStore
548	NZ Index Bugs	David Groth	Resolved	Fileman\Bundle
546	Global/Section Index preview does not look same as generated index layout	David Groth	Resolved	Fileman\Bundle
544	From File Name document option not working across any indexes, not showing in workspace OR the generated bundle - screenshots below	David Groth	Resolved	Fileman\Bundle
543	Document date column options in section settings are too wide/misaligned	David Groth	Resolved	Fileman\Bundle

541	Edit Index layout	David Groth	Resolved	Fileman\Bundle
389	Upload Directories and Subdirectories with file structure from local PC	David Groth	Resolved	Fileman\Bundle
534	Bug with Directory Upload where nested directory with same name is putting files to one section only	David Groth	Resolved	Fileman\Bundle
529	BundlePro button in the System Monitor page is not working and throwing the attached error in UK	David Groth	Resolved	Fileman\Bundle
370	the user profile in Auth Server is messed up	David Groth	Resolved	Fileman\LegalStore
359	Back to Workspace from elsewhere, return to correct highlighted document(s) and section	David Groth	Resolved	Fileman\Bundle
358	Preview window back to Workspace goes to the first section, and not back to the correct Section	David Groth	Resolved	Fileman\Bundle
357	(NZ Indexes) Select Multi Doc and apply Author/Recipient to only those docs selected	David Groth	Resolved	Fileman\Bundle
360	(NZ Indexes) Column width adjustments	David Groth	Resolved	Fileman\Bundle
356	(NZ Indexes) New extra 'Picking List' feature in Discovery Index	David Groth	Resolved	Fileman\Bundle
364	Apply 'DocType' fields to multiple (same as author tab)	David Groth	Resolved	Fileman\Bundle
361	NZ Index Style to default set to Standard	David Groth	Resolved	Fileman\Bundle
363	Rework Integration setting attached to each bundle instead of at Firm level	David Groth	Resolved	Fileman\Bundle
362	(NZ Indexes) New Employment Casebooks	David Groth	Active	Fileman\Bundle
344	Error with pagination for NZ (200014 NZ Bug Bundle)	David Groth	Resolved	Fileman\Bundle
345	Bundle failing to generate with NZ settings but turning off 'Show Document Number'	David Groth	Resolved	Fileman\Bundle
206	Exclude Volume title page and index from page count not working	David Groth	Resolved	Fileman\Bundle
213	Index Font Issue - See Image	David Groth	Resolved	Fileman\Bundle
182	Using tab numbering creates a column on the index, but removes the page number column - is this correct?	David Groth	Resolved	Fileman\Bundle
186	Turned off 'Use Tab Numbering' in global settings but column on the index is still there	David Groth	Resolved	Fileman\Bundle
187	Added in an image watermark and now trying to delete, but it will not delete.	David Groth	Resolved	Fileman\Bundle

205	Restart page numbers for volumes not working unless Volume Index is Turned on	David Groth	Resolved	Fileman\Bundle