

Document 19.11

Release Notes



Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	03-DEC-2019	Initial publication
1.1	04-DEC-2019	Updated text input type screenshot in Checklist – Field options.

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Release summary

This release of Document includes improved configuration of forms, the ability to automatically update Vendor Data deliverable changes, Bluebeam Revu integration with Chrome and some new fields.

New features

There are no new features in this release.

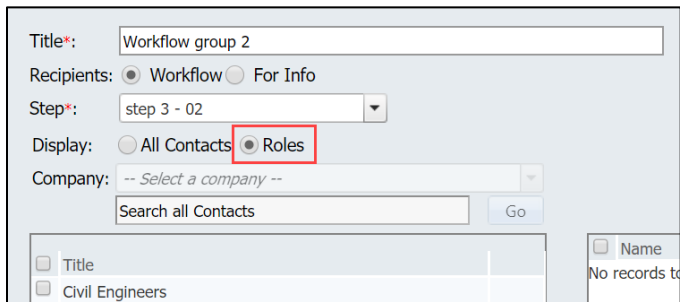
Improvements summary

- **Forms:**
 - **Role-based security in Forms** – The ability to leverage roles within Form review teams streamlines the process to add and remove users in assigned workflows and review teams. Project teams no longer have to search the system to make updates and can simply update the group as required. [Read more](#).
 - **Lock form initiator section** – This new setting lets project teams lock the initiator section down when not in the initiator step. This section of a form could previously be modified at any step of the workflow, which created a risk that information could be modified after it had been approved. [Read more](#).
 - **Form comment Closed-out status field** - This field provides the necessary visibility to those involved in a form to help understand what truly closed versus what is outstanding. Not having a **Closed-out** status field against the comment section in the form made it difficult to know if it had been actioned or completed, which caused issues with visibility of form comments and inefficiency. [Read more](#).
- **Documents – Bluebeam Revu integration Chrome compatibility** – The ability to open PDF files directly in Bluebeam Revu to edit them with Google Chrome is now available. It could previously only be leveraged with Internet Explorer. [Read more](#).
- **Vendor Data – Automatically update deliverable line item** – You are able to automate deliverable changes, which can affect statistics as associated documents are delivered and processed in the holding area. This enhancement reduced the steps necessary to update each line item. [Read more](#).
- **Checklist - Field Options** – The ability to enforce value types on text fields such as numeric or alpha characters and a time entry field is now available within Checklists. [Read more](#).

Forms

Role-based security in Forms

You can now select roles instead of just individuals when creating or editing a workflow group. This new **Roles** option is available in the **Configure Form Types** window, when you select **Add/Edit** under the Distribution column and add a new workflow group or select an existing one.

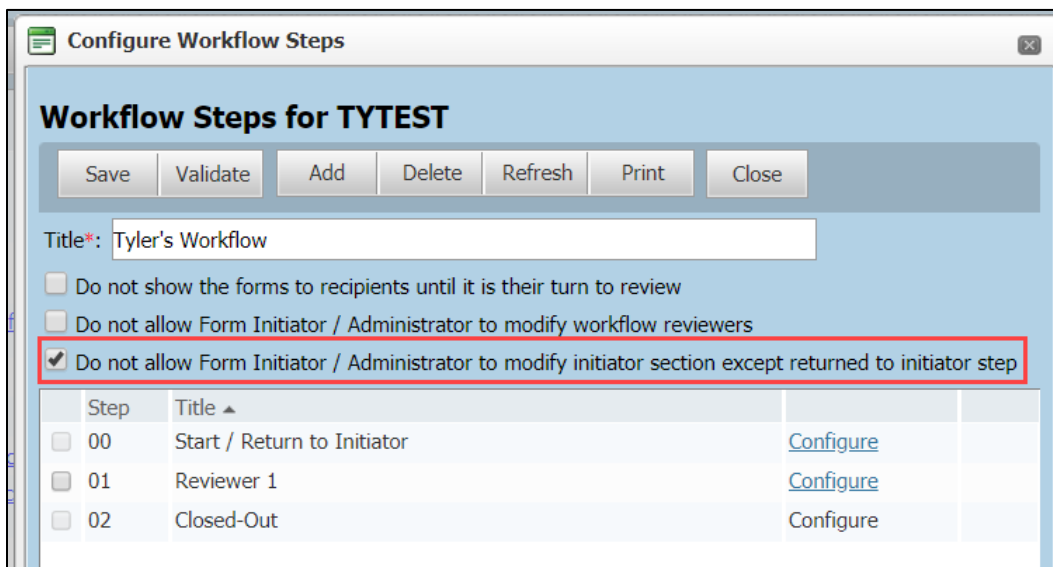


The screenshot shows a form titled 'Workflow group 2'. The 'Recipients' section has 'Workflow' selected. The 'Step' is 'step 3 - 02'. The 'Display' section has 'Roles' selected, which is highlighted with a red box. The 'Company' section shows '-- Select a company --' and a search bar with 'Search all Contacts' and a 'Go' button. Below the form, there are checkboxes for 'Title' and 'Civil Engineers'.

Lock form initiator section

When you configure workflow steps, there is a new **Do not allow Form Initiator / Administrator to modify initiator section except returned to initiator step** option to check. This option is available in the **Configure Form Types** window, when you select **Add/Edit** under the Workflow column.

NOTE: This option does not lock the initiator section when in the initiator step.

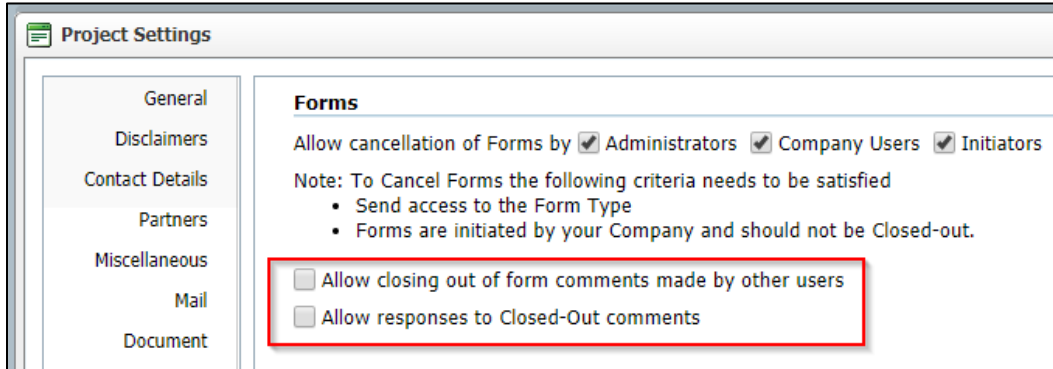


The screenshot shows the 'Configure Workflow Steps' window for 'Tyler's Workflow'. The window has buttons for 'Save', 'Validate', 'Add', 'Delete', 'Refresh', 'Print', and 'Close'. The 'Title' is 'Tyler's Workflow'. There are three checkboxes: 'Do not show the forms to recipients until it is their turn to review', 'Do not allow Form Initiator / Administrator to modify workflow reviewers', and 'Do not allow Form Initiator / Administrator to modify initiator section except returned to initiator step', which is checked and highlighted with a red box. Below the checkboxes is a table with columns 'Step', 'Title', and 'Configure'.

Step	Title	Configure
00	Start / Return to Initiator	Configure
01	Reviewer 1	Configure
02	Closed-Out	Configure

Form comment Closed-out status field

In **Project Settings**, there are two new options in the **Forms** tab to allow other users to close out form comments and respond to closed-out comments.



The screenshot shows the 'Project Settings' window with the 'Forms' tab selected. A red box highlights two new options: 'Allow closing out of form comments made by other users' and 'Allow responses to Closed-Out comments', both of which are currently unchecked.

Project Settings

Forms

Allow cancellation of Forms by ☒ Administrators ☒ Company Users ☒ Initiators

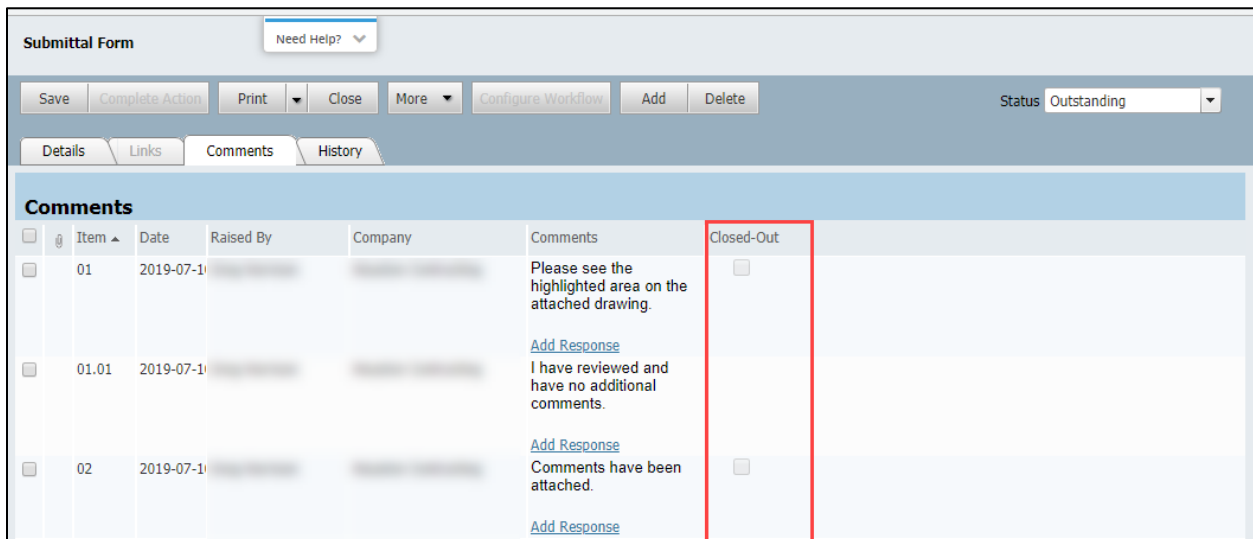
Note: To Cancel Forms the following criteria needs to be satisfied

- Send access to the Form Type
- Forms are initiated by your Company and should not be Closed-out.

☐ Allow closing out of form comments made by other users

☐ Allow responses to Closed-Out comments

When you open the **Comments** tab of a form, there is now a **Closed-Out** column with checkboxes that you can select, if that option has been enabled in Project Settings.



The screenshot shows the 'Submittal Form' window with the 'Comments' tab selected. A red box highlights the 'Closed-Out' column in the comments table, which contains checkboxes for each comment row.

Submittal Form Need Help?

Save Complete Action Print Close More Configure Workflow Add Delete Status Outstanding

Details Links Comments History

Comments

<input type="checkbox"/>	Item	Date	Raised By	Company	Comments	Closed-Out
<input type="checkbox"/>	01	2019-07-1			Please see the highlighted area on the attached drawing. Add Response	<input type="checkbox"/>
<input type="checkbox"/>	01.01	2019-07-1			I have reviewed and have no additional comments. Add Response	<input type="checkbox"/>
<input type="checkbox"/>	02	2019-07-1			Comments have been attached. Add Response	<input type="checkbox"/>

Documents

Bluebeam Revu integration Chrome compatibility

On projects where Bluebeam Revu integration is enabled, to open a document in Bluebeam Revu, you can right-click on any document in the list and select **Open Latest Version with Bluebeam** from the drop-down menu.

NOTE:

This option is only available in the Documents module. You need to have a suitable Click Once add-in installed in Chrome. Please contact InEight Support for assistance.

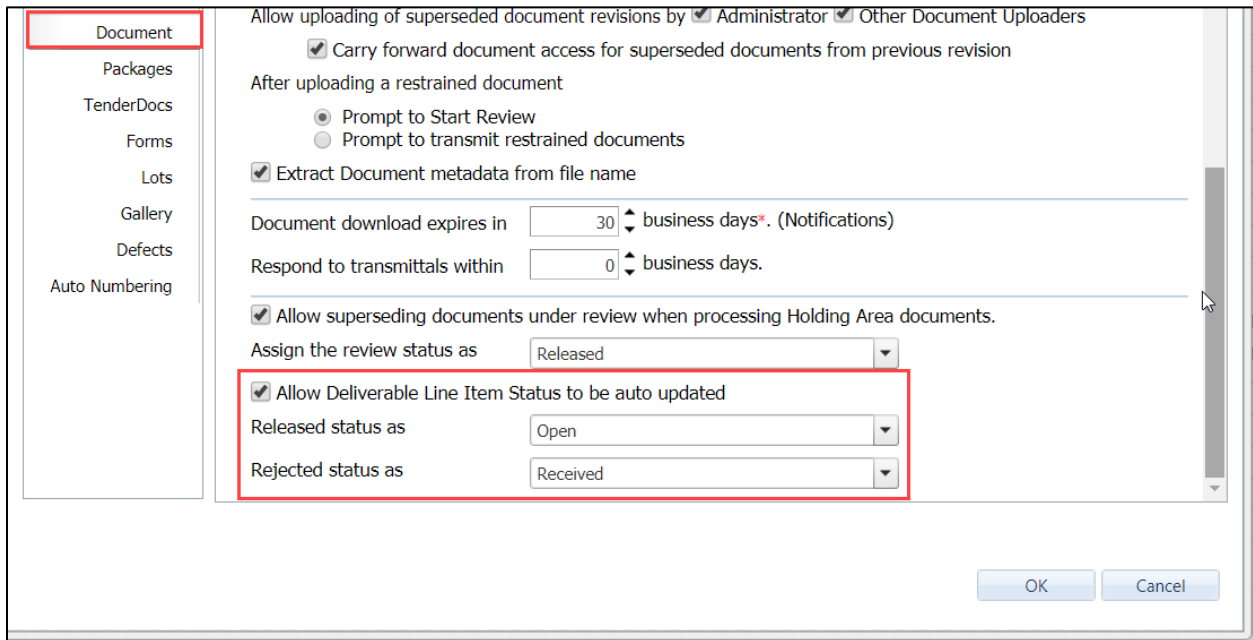
Document No.		Rev	Sts	Title	Disc	Review Stat
J2-001		A	8MILE	J2-001	8MILE	Released
S-GF-0012		B	IFI	Ground Floor		Restrained
MD-00123		J	PD	Level 990 sk		Used
QAS-ARCH-L1-002		B	IFI	Foyer Design		Restrained
TB-REL-521		C	IFI	Release 5.21		Restrained
TB-REL-520		C	IFI	Release 5.20	CIV	Un-Restrained
E-C-L-0002A		C	AB	High Voltage Electrical Outline Level 2A	ELEC	Released

- Generate Document Hyperlink
- View User Access
- View Current Review Status
- View Transmittal History
- Open Latest Version with Bluebeam

Vendor Data

Automatically update deliverable line item

In Project Settings, under the **Document** tab, there is a new option at the bottom to **Allow Deliverable Line Item Status to be auto updated**. You can also use the drop-down menus to set which review status code you want Release and Rejected statuses to be updated to.



Document

Packages

TenderDocs

Forms

Lots

Gallery

Defects

Auto Numbering

Allow uploading of superseded document revisions by ☒ Administrator ☒ Other Document Uploaders

☒ Carry forward document access for superseded documents from previous revision

After uploading a restrained document

☐ Prompt to Start Review

☐ Prompt to transmit restrained documents

☒ Extract Document metadata from file name

Document download expires in business days*. (Notifications)

Respond to transmittals within business days.

☒ Allow superseding documents under review when processing Holding Area documents.

Assign the review status as

☒ Allow Deliverable Line Item Status to be auto updated

Released status as

Rejected status as

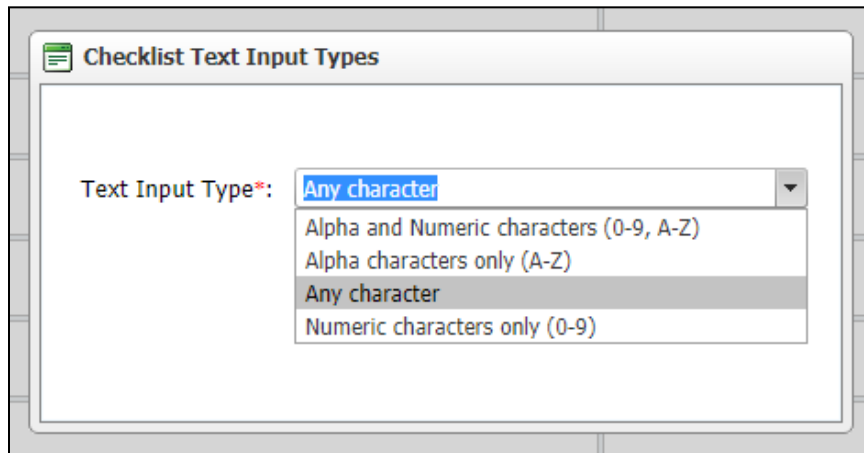
OK Cancel

Checklist

Field options

In the **Manage Checklist Type** window, when you add a new checklist type or edit an existing one, there are two field changes in Sections.

If the **Response Type** is set to **Text**, you can select **Configure** to set the **Text Input Type** to be alpha and/or numeric characters, or any character.



There is also a new response type called **Date Time**, which lets you add the time in addition to the date. When you use Date Time, the checklist shows two fields for date and time selection.

