Document 20.9 Classic UI

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	24-NOV-2020	Initial publication

Contents

What's new in Document 20.9

- **Forms:**
    - **Inactive user message** – When an inactive user is part of a Forms workflow, the system alerts you to remove or replace the inactive user from the workflow.
    - **Form reactivation settings** – A project setting has been added to control whether admins or initiators can reactivate lots. An additional security group setting has also been added to control whether users can reactivate forms. Read more.
    - **Workflow changes to forms in review** – This feature adds an option to push recent workflow changes to forms that are in progress. Previously, changes to workflows only applied to newly created forms. Read more.
    - **Text input** – The same text input functionality that is available in the Mail module is also included in Forms.
- **Lots:**
    - **Closed-out lot settings** – A project setting has been added to enable and disable the ability to add or remove lot items that have been closed out. Read more.
    - **Reactivate lots group setting** – A security group setting has been added to control whether users can reactivate lots. Read more.
- **Access:**
    - **Delegate user assignment** – Project administrators can now specify who can add users to a security group.
    - **Remove inactive users** – Document now removes inactive users from assigned roles.
- **Mail:**
    - **Read/Unread indicator –** The Unregistered box now shows items as read or unread, with the ability to mark them as well. Read more.
    - **Outgoing mail addresses** – A change has been made to outgoing mail for companies in projects without an email in address setup. Read more.
- **Documents:**
    - **Conflicts warning message** – If a Distribution rule is created that conflicts with defined Restricted Document Access rules, a warning message is shown.
    - **Prevent restricted document attachments** – An option has been added to prevent restricted documents from being attached to Forms and Mail.
    - **Restricted document access** – You must belong to all defined restricted access rules that a document meets to have access. Previously, if a document met the criteria of multiple restricted document access rules, you were only required to belong to one of the rules, regardless of meeting all the defined standards.
    - **Change details for specific revision** – A new project setting lets you change Document details for a specific revision instead of only the latest or all revisions. Read more.
- **Security**:
    - **TLS 1.0/1.1 support discontinued** – Beginning 31 December 2020, Document servers will not support TLS 1.0 or 1.1 and will only support versions 1.2 or above. Most web users are not impacted by this, but if you use XL-Upload, Outlook integration, or Document mobile, ensure you update to the latest version before this date. If you use

Document API with any custom applications, ensure those applications communicate with the server using TLS 1.2 or above.

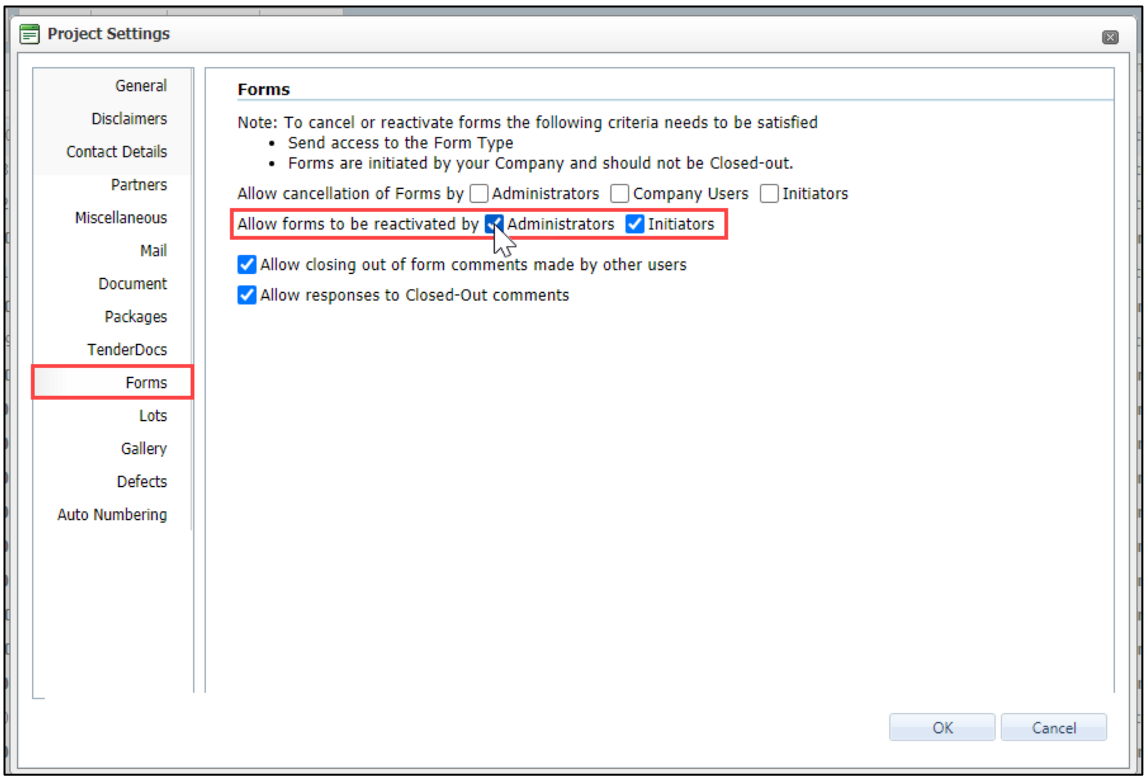
- **Getting Started**:
  - **SSO configuration** – A new tab in company details lets you define SSO information, instead of requesting InEight's technical team configure SSO for you. Read more.

Forms

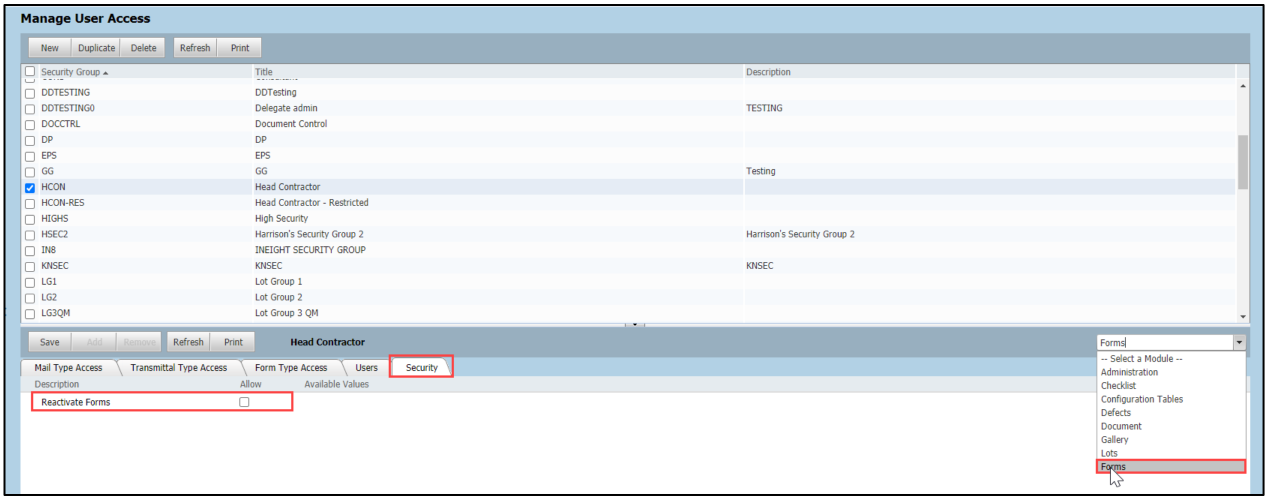
Form reactivation settings

In Project Settings > **Forms**, there are new options to allow forms to be reactivated by administrators and initiators.

NOTE:	This option is selected by default.

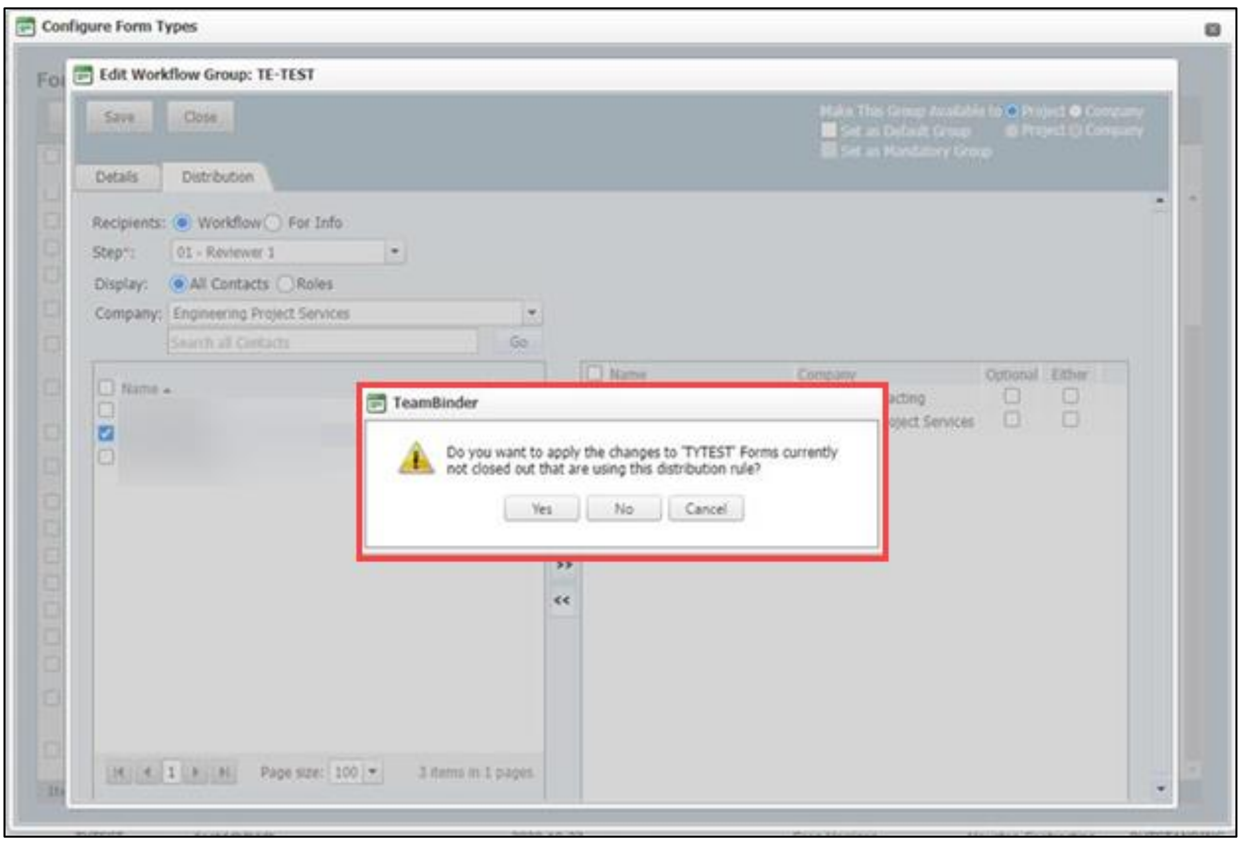


You can also allow specific security groups to reactivate forms. To allow the Reactivate Forms security option, go to Admin > **Manage User Access**, and then select a security group. At the bottom of the page, open the **Security** tab, and then select **Forms** from the drop-down list.



Workflow changes to forms in review

When you make a workflow change to an existing form, you are now shown a dialog box that asks if you want to apply the changes to the form.

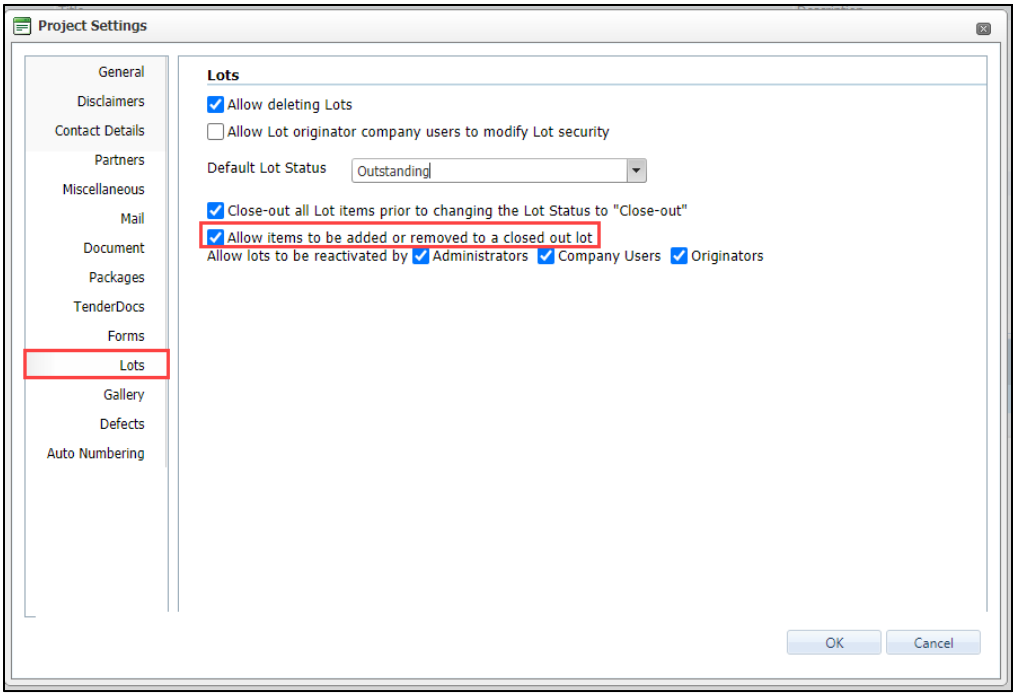


Lots

Closed-out lot settings

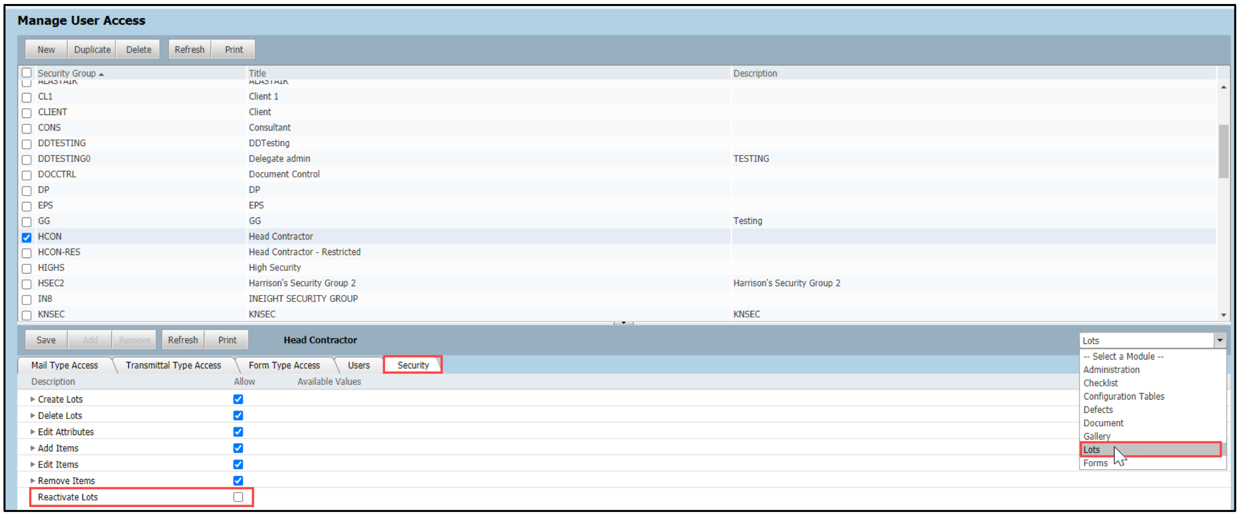
In Project Settings > **Lots**, there is a new option to allow items to be added or removed to a closed-out lot.

NOTE:	This option is selected by default.



Reactivate lots group setting

You can allow specific security groups to reactivate lots. To allow the Reactivate Lots security option, go to Admin > **Manage User Access**, and then select a security group. At the bottom of the page, open the **Security** tab, and then select **Lots** from the drop-down list.

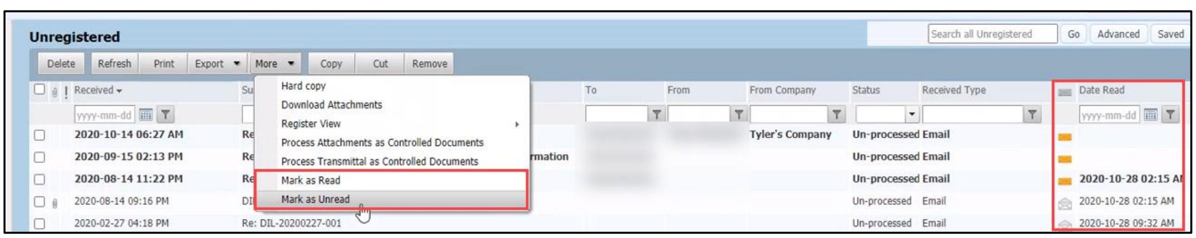


Mail

Read/Unread indicator

In Mail > **Unregistered**, there are new columns for Read/Unread status and Date Read. You can also change an item's read/unread status by selecting an item, and then selecting More > **Mark as Read** or **Mark as Unread**.

NOTE:	For existing items, any processed items show as read, and the Date Read column populates with the processed date. Unprocessed items show as unread.



Outgoing mail addresses

Previously, when you sent mail to external contacts or transmittals, Document sent them to the recipients by email instead of a Document notification. When you responded to the notification, the From address of the email was set according to the following criteria:

- If the company has an email in address, the email in address is set as the From address, so any replies are captured in unregistered mail.
- If the company does not have an email in address, the sender's personal email address is set as the From address, so any replies are sent to the sender.

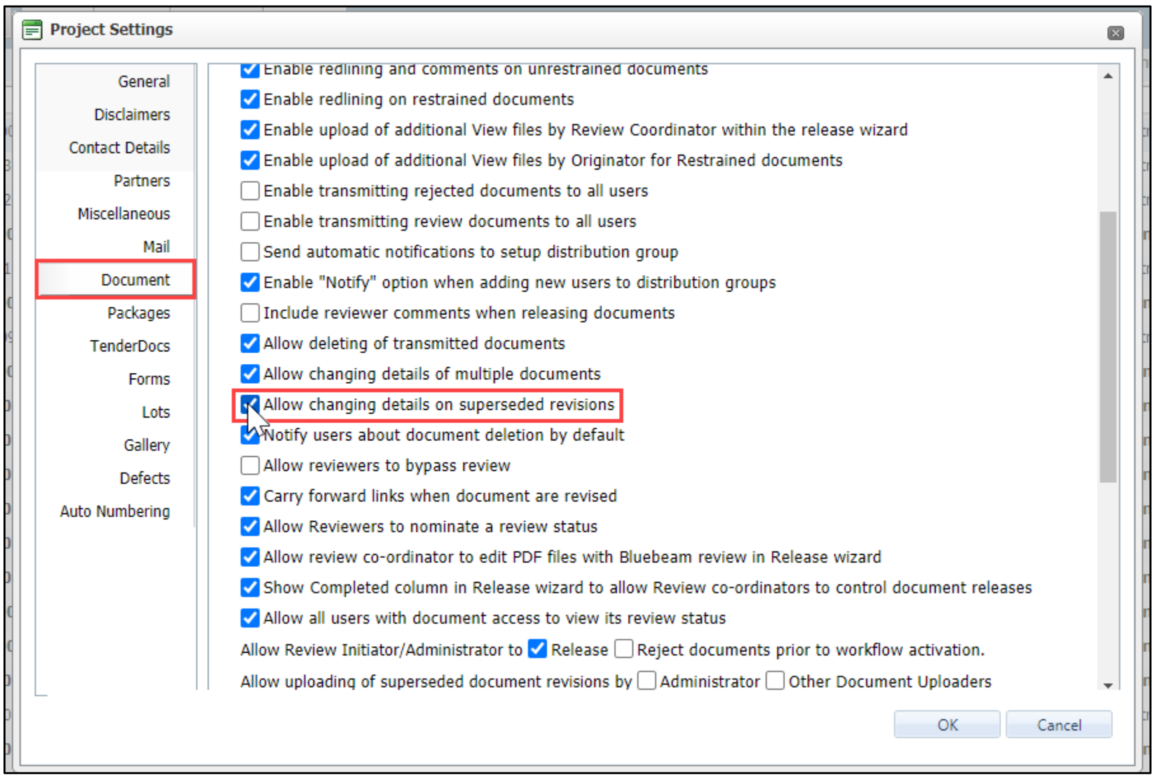
This caused email delivery issues in some cases, as most of the time, the From address was a client specific email address (e.g., name@clientdomain.com) and the Document server is not authorized to send mail on behalf of a client domain.

To prevent these delivery issues, the From address is now always set to a Document system address (e.g., system@doc.ineight.com or system@teambinder.com). To ensure replies are captured as before, the Reply-To address is sent to the email in address or the sender's personal email address.

Documents

Change details for specific revision

In Project Settings > **Documents**, there is a new option to allow changing details on superseded revisions.



Getting Started

SSO configuration

When editing your company, open the **Single Sign-On Setup** tab, and then enter your corporate domain and application ID. After setup, you can use the Login Using address as your SSO link.

NOTE:	After your first project is set up, any future projects just need the company ID and domain name to be populated.