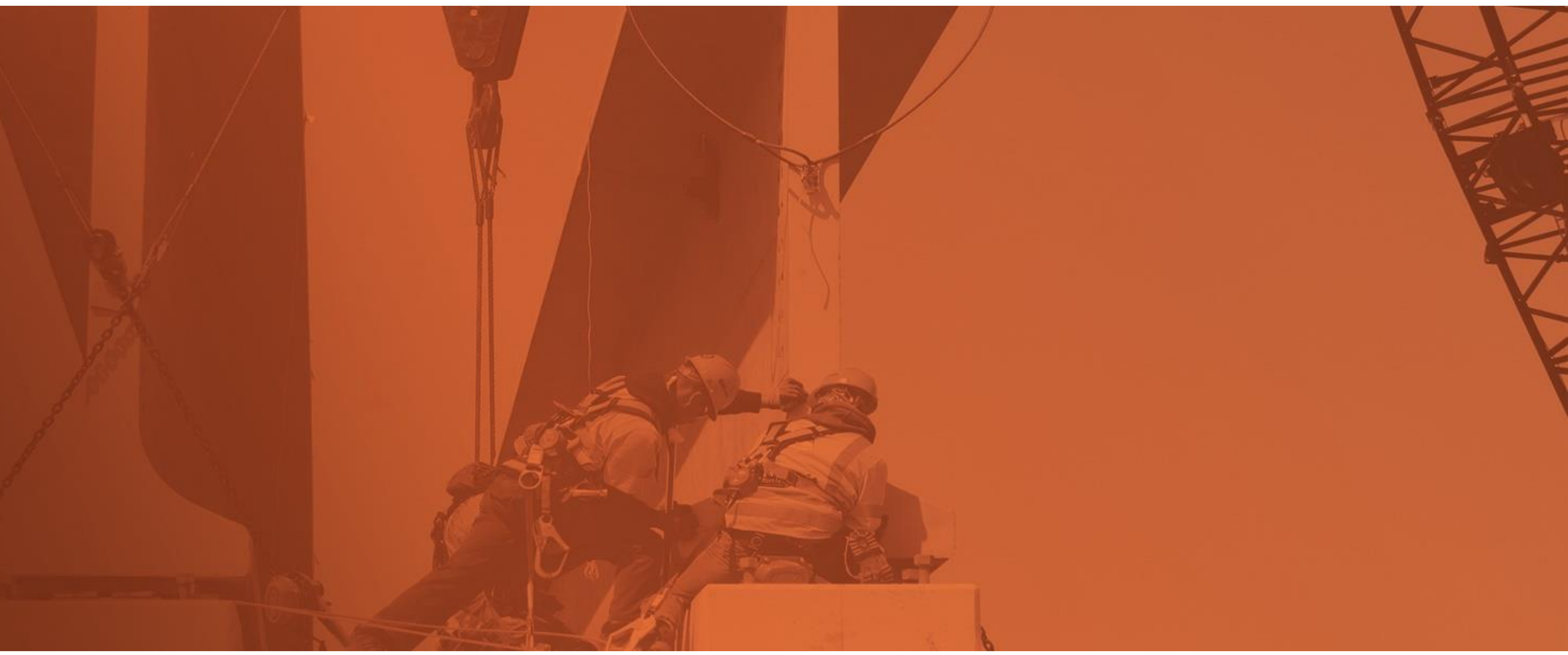


Document 21.3 Classic UI

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	08-APR-2021	Initial publication

Contents

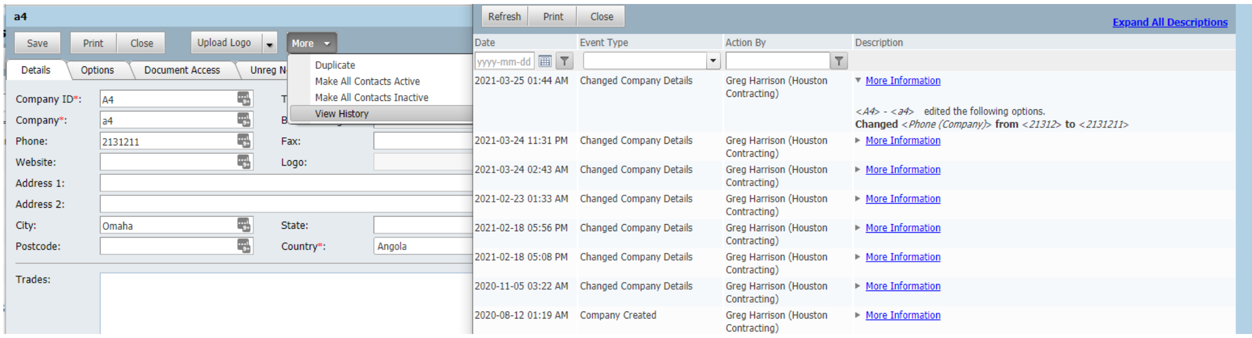
What’s new in Document 21.3

- **Administration**:
    - **Company history** – There is now a complete history log for the Company register. A full audit log captures any newly created companies, modifications, deletions, and other functions, and is available from the toolbar menu. Read more
    - **Contact Tag field** – Tags are now available for use in the contact page. The tag field provides the same functionality that is used in the Gallery module. Read more
    - **Contact groups tab** – In the contact page, a new tab has been added to show the contact groups the user belongs to. This tab also lets you easily manage contact groups. Read more
    - **Document rule history** – There is now a complete history log for the project Document rules. A full audit log captures any newly created rules, modifications, deletions, and other functions, and is available from the toolbar menu. Read more
- **Documents**:
    - **Latest Transmittal No. field** – A new Latest Transmittal No. field is available in the Document register. This field provides visibility into the latest transmittal the Document has been sent on. It only shows items based on the access of the logged-in user. Read more
    - **Manage QR codes** – An option has been implemented to manually manage the QR stamp for Documents from the register. Read more
- **XL Upload**:
    - **Add and split files** – You can split single PDFs into separate pages and upload them as individual documents in XL Upload. Read more

Administration

Company history

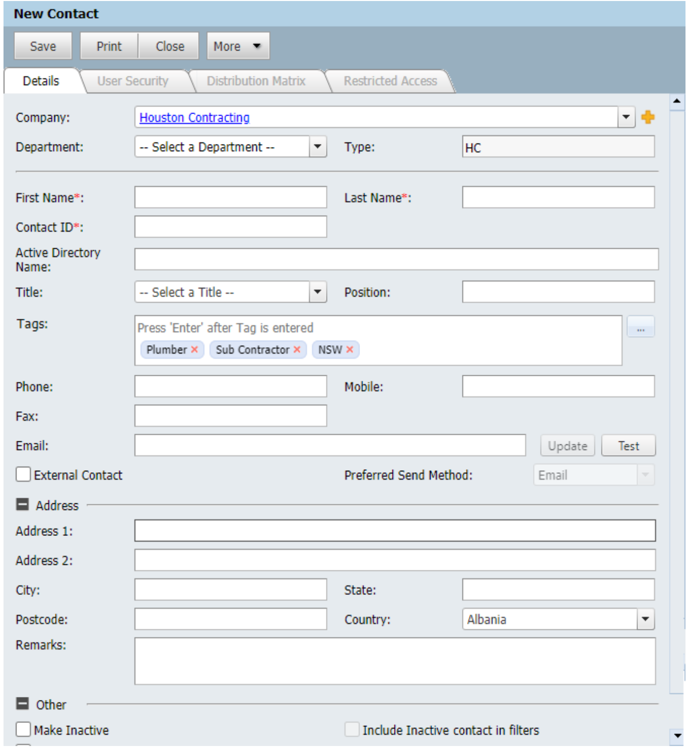
To see company history, go to Contacts > **Companies**. In the list of companies, select a company, and then click the **More** button. In the drop-down list, select **View History**.



You can also see the history of all companies in the list. To see the full history, make sure you have no company selected, and then click **More**. In the drop-down list, select **View History**.

Contact Tag field

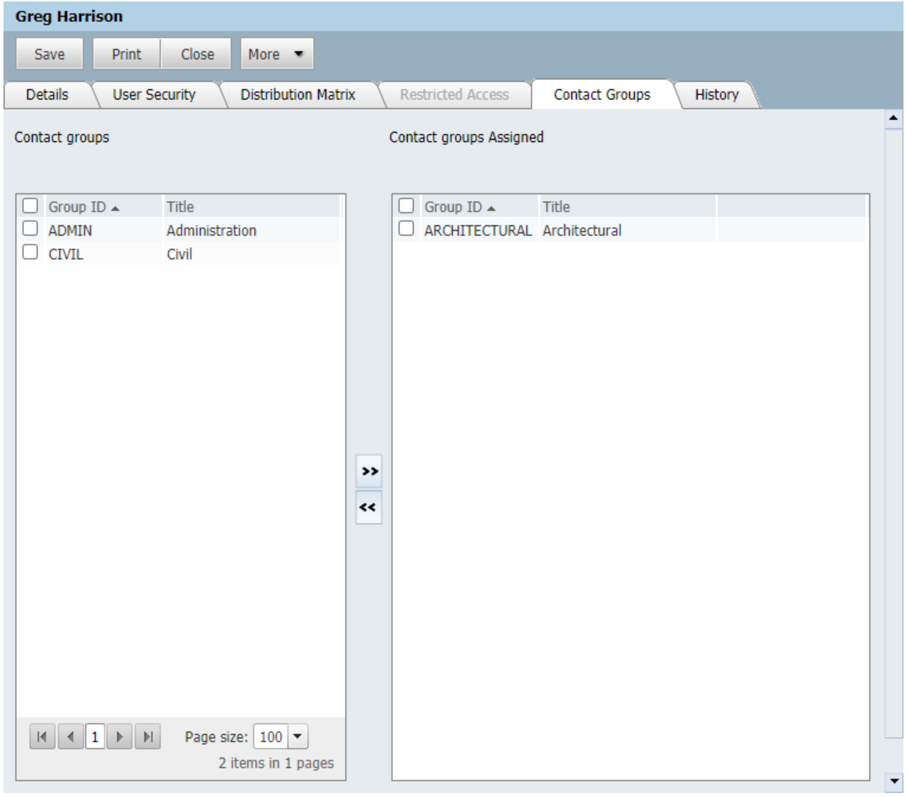
Tags give you additional criteria to classify contacts. In Contacts > **Contacts**, select a contact ID. In the Edit contact dialog box, there is a new Tags field. Click in the field to select a tag, and then enter text to search for a tag, or create a new tag based on your entered text.



Contact groups tab

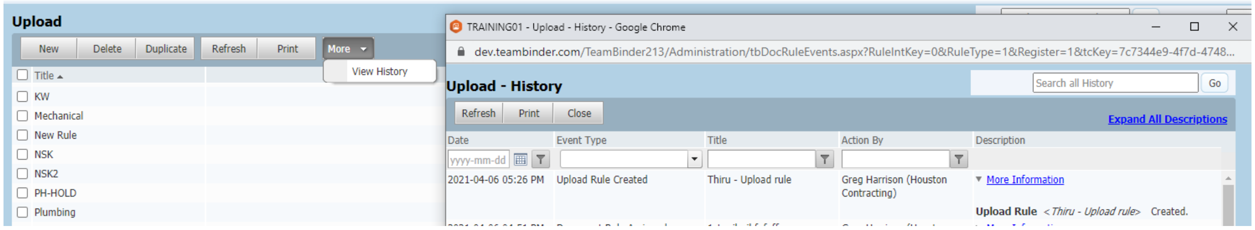
In Contacts > **Contacts**, when you select a contact ID, you can now see which groups the contact belongs to in the Contact groups tab.

You can also assign the contact to groups in the tab. Select groups on the left side of the tab, and then click the right arrow to assign the contact to the selected groups.



Document rule history

To see document rule history, go to Settings > Admin > **Manage Document Rules**. In the list of rules, select a rule, and then click the **More** button. In the drop-down list, select **View history**.



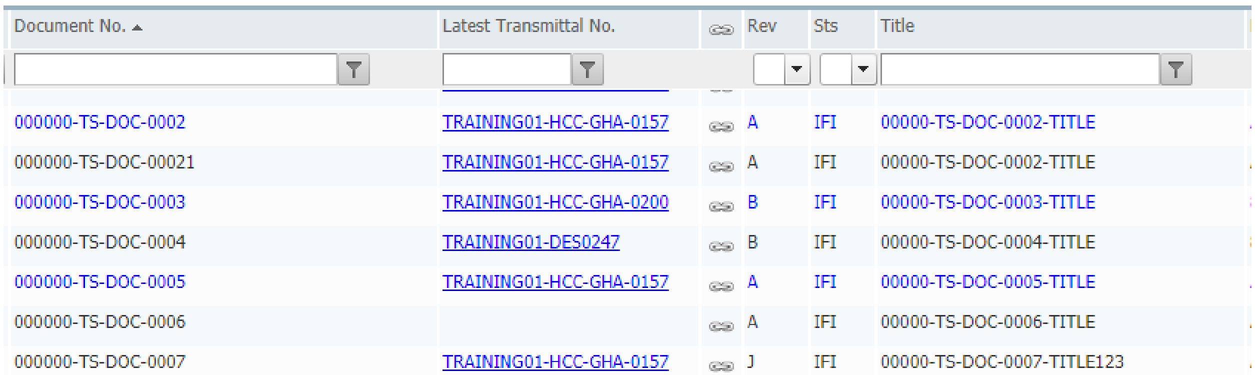
You can also see the history of all rules in the list. To see the full history, make sure you have no rule selected, and then click **More**. In the drop-down list, select **View History**.

Documents

Latest Transmittal No. field

If the Latest Transmittal No. column is not visible, you can customize your view to select it to be visible.

You must have permission to transmittals to see the Latest Transmittal No column in the Documents register.

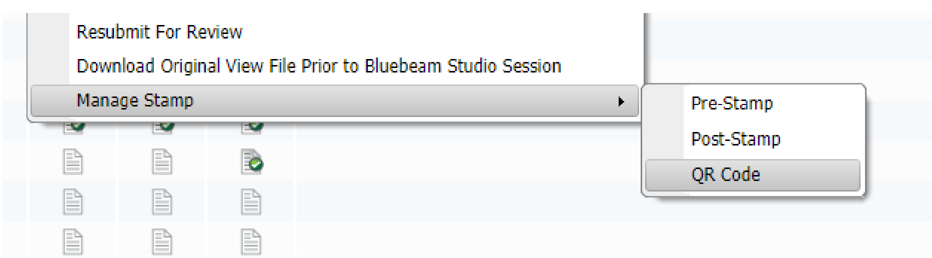


Document No.	Latest Transmittal No.		Rev	Sts	Title
000000-TS-DOC-0002	TRAINING01-HCC-GHA-0157		A	IFI	00000-TS-DOC-0002-TITLE
000000-TS-DOC-00021	TRAINING01-HCC-GHA-0157		A	IFI	00000-TS-DOC-0002-TITLE
000000-TS-DOC-0003	TRAINING01-HCC-GHA-0200		B	IFI	00000-TS-DOC-0003-TITLE
000000-TS-DOC-0004	TRAINING01-DES0247		B	IFI	00000-TS-DOC-0004-TITLE
000000-TS-DOC-0005	TRAINING01-HCC-GHA-0157		A	IFI	00000-TS-DOC-0005-TITLE
000000-TS-DOC-0006			A	IFI	00000-TS-DOC-0006-TITLE
000000-TS-DOC-0007	TRAINING01-HCC-GHA-0157		J	IFI	00000-TS-DOC-0007-TITLE123

Manage QR codes

You can manually add a QR code to a document. Select a document, and then click **More**. In the drop-down list, select Manage Stamp > **QR Code**.

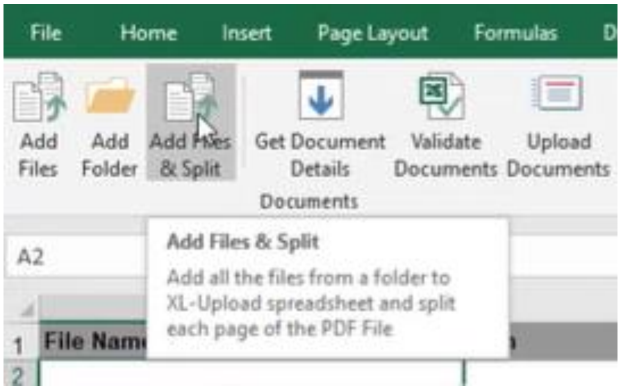
NOTE:	This option is only available for projects that have QR codes enabled.



XL Upload

Add and split files

You can add and split files with the Add Files & Split button in the XL-Upload toolbar menu in Microsoft Excel.


File
Home
Insert
Page Layout
Formulas
Add Files
Add Folder
Add Files & Split
Get Document Details
Validate Documents
Upload Documents
Documents
Add Files & Split
Add all the files from a folder to XL-Upload spreadsheet and split each page of the PDF File
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