



# **Document 21.10 Enhanced 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	10-OCT-2021	Initial publication



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# What's new in Document 21.10

#### • Documents

- **Download more than 100 documents** A new bulk download option lets you download more than the previous limit of 100 documents. <u>Read more</u>
- Restore deleted view files and comments You can now restore deleted view files and comments to the Documents register. Previously, only the InEight technical team could restore them. <u>Read more</u>
- **Apply tags** A Tags field has been added to the Document details, so you can add tags against contacts like the Tags field in the Gallery. <u>Read more</u>
- OCR when document is uploaded You can now apply optical character recognition (OCR) to PDFs in Document. This eliminates the need for additional processes to be performed in outside applications. <u>Read more</u>
- Forms
  - Process attachments and forms as PDFs You can now publish completed forms as PDFs in the Documents register, so they can become official documents. <u>Read more</u>
  - Export comments You can now export comments from the Comments tab and from the Forms register. <u>Read more</u>
  - For Info users on Issued notification For info users now receive the Form Issued notification when a form is issued.
- Packages
  - Download documents from multiple packages You can now download all documents from multiple packages at one time. <u>Read more</u>
- Viewer
  - Annotation and comment improvements Individual annotations are created as comments and can be selected for release with the document. Previously, you could not see which specific annotations are being referenced on the file even though the annotations were listed as comments. <u>Read more</u>
- Submittals
  - Link documents to deliverables prior to issue The managing company can now either link to existing documents or upload new documents for deliverables before they send the submittal to the issued-to company. The issued-to company can then upload the files against the deliverables. <u>Read more</u>
  - Comments tab The comments tab has been added to the Submittals module. The tab shows both the deliverable document comments and the comments made against the Submittal only. You can also use this tab to create and manage comments. <u>Read more</u>



- Export cover sheet You can now add an official cover sheet with relevant information for a submittal during the submittal or upon completion of the submittal. This new function gives you the option to export one or more submittals to a PDF with associated documents, supporting documentation, comments, and linked items with a cover sheet that explains the contents. You can export the PDF as a zip file or a single PDF. <u>Read more</u>
- Create set You can now group submittals and create a set to view in a separate register. This lets the managing company view and organize a collection of submittals to export out of the system. <u>Read more</u>
- Lots
  - Status distribution Document can now notify users when a lot is in a specific status. Previously the only way to find out the status was in a report. <u>Read more</u>
- Admin
  - Include custom fields in change document security option For the security group option for controlling change documents details, custom fields are now shown as an option by default for selection instead of just the standard fields.
- Mail
  - Send roles for review You can now select a role when sending mail for review. Selecting a role lets you send mail to multiple people. <u>Read more</u>
- Notifications
  - Add notification prefix You can now add a prefix to the subject line of all notifications. This lets users who are actively working on multiple projects identify which project the notification came from. <u>Read more</u>
- Japanese Document is now available in Japanese.



# Document

#### **Download more than 100 documents**

Previously, the Documents register limited downloads to 100 documents. Now, the new Download via Queue option in the Select files to download dialog box lets you download documents by creating a zip file and adding them to a queue. This method can accommodate more than 100 files at a time. The Direct download option is not available when you have selected more than 100 files. Fields that specify the title and maximum zip size of the download queue also have been added to the Select files dialog box. You can also specify whether to require a password to the zip file and to include the document metadata spreadsheet in the download.

A new option on the Actions menu, Manage download queue, opens the Manage download queue page where you can see the download title, status, number of files and the documents. You can also download the documents from this page.

#### **Restore deleted view files and comments**

Document now creates a file that functions as a recycle bin where deleted documents are stored. To access the deleted documents, go to the module navigation, under documents select **Deleted items**.

Document / Dashboard		
Dashboard		
Mail	۲	
Documents	•	Register
Transmittals	۲	Review
Packages	•	Release
Defects	Þ	Manage workflow
Tasks	•	Deleted items
Published reports		
Lots		

The Manage deleted documents register opens. To restore a document, select Actions > **Restore**. The document and any comments are returned to the Documents register. If a document was deleted in the last 30 days, comments are included when restored. If a document was deleted more than 30 days ago, the user will be presented with the new document upload screen with the relevant metadata and the view file. This will be treated as a new document in the register and will not have any previous comments or other associations.





Restore can also be controlled via Security group setting. Under Security, Documents there is a new option **Restore Documents**.

Access type: Security - Module: Document	-	
Description	Allow	Available values
✓ Change Document Details		Documents I have uploaded
Delete Documents		Documents I have uploaded
Replace/Remove View Files		Documents I have uploaded
Transfer Document Ownership		Documents I have uploaded
Export Documents		Documents I have uploaded
Synchronise Documents		Documents I have uploaded
Apply Pre Stamp		
Apply Post Stamp		
Apply QR Code		
Manage Tags		
Add/Edit tags on Documents		Documents I have uploaded
Restore Documents	X	Documents I have uploaded

# Apply tags

You can select tags from the drop-down list or begin typing and select from the autocomplete suggestions.

Elect the ta	igs to add to the selected images	
PROF I	Aparoments A RO	•
ROOM 1		
Room 2		
Room 3		
Room 4		
Room 5		

Forms



You can add or remove the available tags on the project from the Document register Actions > Manage tags.

Tag	Only available for Administrators	Parent tag
00000	No	
Add new tag Tag name Only available fo	r administration	×
		Cancel Save
B1	No	

A security group has been added for managing tags in document details. Go to Settings > Admin > **Manage user access**, and then select a security group. Select **Security** as the Access type and **Document** as the Module. Select **Manage tags** to allow users to manage tags.

# OCR when document is uploaded

To enable the OCR process, go to Project settings>Document > Upload, and then select Enable OCR PDF's on document upload.

General	Cancel Save
Disclaimers	General 🔨
Contact details	Allow changing details of multiple documents
Partners	Allow deleting of transmitted documents
Missellenseur	Notify users about document deletion by default
Miscellaneous	Allow changing details on superseded revisions
Mail	Attaching 'restricted dosument access' documents to mail/forms:
Document	C Enable
Packages	Upload A
Tender docs	Minimum document No. length:
Forms	Extract document metadata from file
Lots	Enable OCR PDF's on document upload

# Forms

#### **Process attachments and forms as PDFs**

If a form has attachments, you can select **Process attachments as controlled documents** from the Actions menu on the Forms register.



Filter/Sort								
Actions • 🕂 •	0 🗗 🔹							
Admin	•	Iss						
Duplicate	, <del>.</del>							
Change Status To	•							
Generate Form Hyperlin	nk							
Generate Hyperlink for the current r								
Create Forms in Bulk	•							
Process attachments a	is controlled							

The Attach as PDF file dialog box opens and asks if you want to Attach the form as a PDF file.



When you click **Attach as PDF file**, you can then select the attachments and indicate whether to process each form as an individual document with attachments or process each attachment as a single document in the Documents module.

Pr	e select now you wish to pro-	cess them below. idual document with its attachmen	ts
Pri	ocess each form attachmen	t as a single document	A
/	For your review	Zip attachments	
	For your review.Po	If	

After you click **Process**, the Bulk upload screen opens, and then you can create the documents.

#### **Export comments**

The Comments tab now has an Export icon.





#### Packages

Click the icon to export the selected comments to a Microsoft Excel spreadsheet.

The Select files to download dialog box that is shown when exporting forms as a complete PDF has been updated to let you include comments. Select the Include form comments check box to include comments.

# Packages

### **Download documents from multiple packages**

The Package register toolbar has been updated to include a download option. One or more packages can be selected for download and a zip file is generated for the packages and their associated documents.

# Viewer

#### **Annotation and comment improvements**

This enhancement lets you launch the viewer from the release window and mark annotations for release. The annotations and comments panes have also been consolidated, and improved information and the ability to filter based on comment data have been added.

# **Submittals**

### Link documents to deliverables prior to issue

The linked documents serve as placeholders for the deliverables. The issued-to company can attach the actual deliverable file in the placeholder.

A new project setting (Settings > Project settings > **Submittals**), Allow submittal recipient to add new documents, lets you restrict the issued to company from adding new files that do not have a document placeholder. When selected, the Issued to company can add any files to the deliverable. When unselected, the issued-to company can only add files to the documents sent by the managing company. This can prevent the issued-to company from sending something other than what is expected.

When you link additional documents after the submittal is issued, a new dialog box asks you if you want to notify the issued to company of the added document.



If you click No, the links are sent without notification. If you click Yes, The Generate transmittal page opens, and you can format the notification before sending the links.



## **Comments tab**

The Comments tab shows the comment level, which can include multiple documents, along with an item number and a submittal comment number.

To add an additional comment, click the Add icon. The New comment dialog box opens.

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Submittal	ODd	cument					2000-2	1						۷
Comments														
Format	٠	в	I	ŭ	Ε	Ξ	=	II	ł≡	E	00		Ш,	
ailable to														
Company														۷
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ielect a com;	any					~	Select	a contact						۷
nd document Originator	commente	to eview coor	dinator	D	cument reci	pients								
💽 Attach fi	les J	Downle	ad all	<u>↓</u> Der	mload select	ed								
File n	me 0000	01.doc									1	15 KB	Θ	
													0	

You can then select who has access to the comment and attach files. After you save the comment, it is shown on the Comments register. The Closed-out column on the register lets you manually indicate whether the comment has been closed out.

You can add a response to a comment by clicking the comment icon in the Comments field. The response is saved on a separate line. The item number shows a suffix to note that it is a response to the comment.

#### **Export cover sheet**

You can export submittals from the Submittal register or the Set register. To export as a PDF, click the **Export** button, and then select Selected submittals > **PDF (Complete)**. You can then select whether to export as individual files or export as a single PDF.

The cover sheet shows the submittal or set number and then lists the submittals, deliverables, and documents in the PDFs. All the submittals, deliverables, and documents are attached after that.

-	-	HCC-031 - Submittal	InEight'		
Project number: Project title:	TRAINING01			DOCUMENT	
Date: Submittal No:	05 August 21 20002-1	021, 09:44:11 PM +11:00			
Submittals					
Submittal No.		Title		Status	
20002-1		Submittal Title A	OUTSTANDING		
Deliverables					
Deliverable number		Description		Status	
DEV001		dev001	RECEIVED		
DEV002		dev002	RECEIVED		
Documents					
Deliverable number		Document number	Title	Status	
DEV001		2021-08-17-01-2021-08-17-02-1	Admin functions based on users typ	Under Review	



#### **Create set**

A set is a grouping or package of submittals. You can now select multiple submittals and group them as a set. The set is available on a separate Set register in the Submittals module.

The Create Set button has been added to the Submittals register. To create a set, select the submittals you want to include, and then click the **Create Set** button.

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A	ctions -	⊕•[	🕽 🔹 Transmit 👻 Cre	eate Set								CI	Manage columns 1	Search Submittals				
									Issued to									
	Submittal No.		Title		Deliverables	Status	Rev	Created by	Date created	Company	Name	Area	Discipline	Submittal category				
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8	-0-000003		And in case of the local division of the loc		1.8			(magnetized	0.000		Stational Street	-	-	-				
	-0-000004		Institute I		1.0			and some strength	10000-0100	Statistic Contesting	Trap Parcel		-					
	-0-000005		Taxang contenents		1.8			The second se	1000 C 100 C 100	Sector Se	Tax Reserve		-					
	-0-000006		Transportance in the R		1.0			The part of the second	10-10-10-10-10-10	Conceptual Annual An	Taxa di Antonio	-						

The New Set dialog box opens. Document assigns a unique set ID, but you can edit it.

Set ID	
TRAINING01-000-20002-1	

To view the Set register, go to Submittals > **Sets**. The register shows the Set IDs and the submittals associated to them. Each submittal is on a separate line.

≡	û New ∨	Document / Submittals / Sets	· ~		-	•			Ø	٥	୭ ⊞
T	iher/Sort	View: System +									
Acti	ms • 👔 •					C Manage o	olumns 😫 Show:	Awaiting my review	• Sear	th Submittal	Q.
0	Set ID	Submittal No(s)	Deliverables	Initiated date	Initiated by	Overall due date	Current stage	Current stage due date	Time in cur	rent stage	Comme
				-		•	~			~	
	202-679-653	20002-1	2 🖲	20-07-2021	Frank Jacobs						Ţ
	202-679-653	20002-2		20-07-2021	Frank Jacobs						<b>1</b>
	202-352-186	30005-1	3 🕫	18-07-2021	Frank Jacobs						
	202-547-347	30005-2	20	17-07-2021	Frank Jacobs						<b>C</b>
	202-547-347	30005-3	50	17-07-2021	Frank Jacobs						

You can click the **Export** button to export the sets into a single PDF.

### Lots

### **Status distribution**

The Status distribution column has been added to the Manage lot types dialog box (Actions > Manage lot types). Click the **Edit** icon for a lot type to open the Status distribution dialog box.

/lanag	e lot types			×
۲	8 B			
	Lot Types	Title	Status Distribution	
	000-100-01	Area A Lots	ß	Â
	000-200-001	Area B Lot	đ	
	000-300-001	Area C Lots	đ	

You can then select a status and the contacts or roles to contact.



Status Distribution - 000-100-01 <sub>Status</sub>					>
OUTSTANDING	-				
* Display:  User  Contact groups					
Available Users		Selected Users		<u>Clear alloc</u>	cat
Tyler's Company - Search		Search			
Name Name		Name	Company		
				Θ	-
	v				
			Cancel	Sav	e

When the lot is in the specified status, the users or roles receive a notification of lot status change.

# Mail

#### Send roles for review

The option to select a role as the reviewer has been added to the Send for review dialog box.

_	*Reviewer: 🔿 Users 💿 Roles		
		-	
	Electrical Engineers	^	
	Civil Engineers		
	SP-334-001		
	GHA-CN00111		
	MITEST		
	HB-ROLE1		
		- //	
* Area		_	* Locatio
- Are:	Cancel	nd	Site - S

After you select the Role radio button, you can specify one role.

# **Notifications**

### Add notification prefix

The General tab in the Project settings (Settings > Project settings > **General**) now includes an option to add a prefix in the subject line to all notifications check box.





Notifications

When you select the Add a prefix in the subject line to all notifications check box, the prefix is automatically added to the subject line of all notifications. If there are customized notifications, the project prefix is not applied to those notifications.