

Document 21.10 Enhanced UI

Release Notes



InEight®
DOCUMENT



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. [Read more](#)
 - **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. [Read more](#)
 - **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. [Read more](#)
 - **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. [Read more](#)
- **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. [Read more](#)
 - **Export comments** – You can now export comments from the Comments tab and from the Forms register. [Read more](#)
 - **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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)
 - **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. [Read more](#)

- **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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)
- **Japanese** – Document is now available in Japanese.

Document

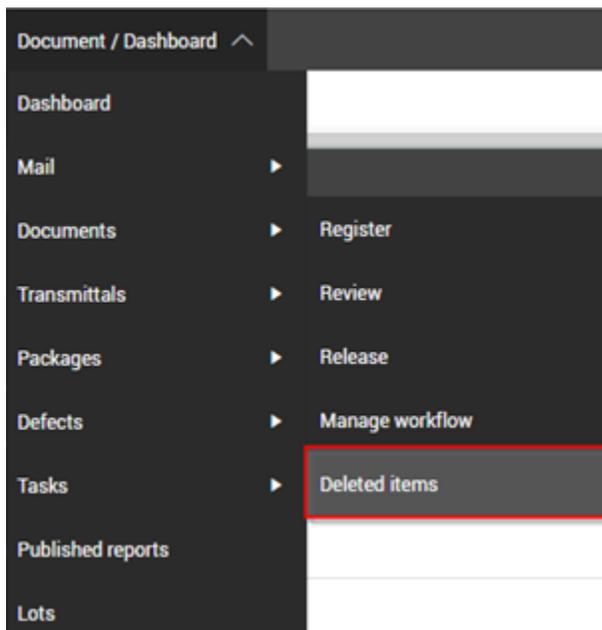
Download more than 100 documents

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

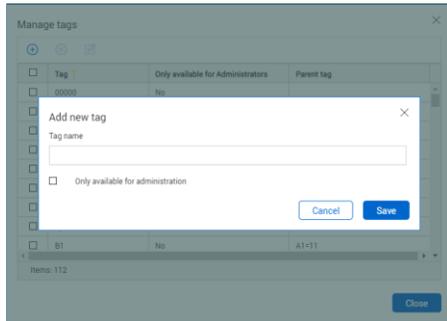
Document now creates a file that functions as a recycle bin where deleted documents are stored. To access the deleted documents, go to the module navigation, under documents select **Deleted items**.



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.

Forms

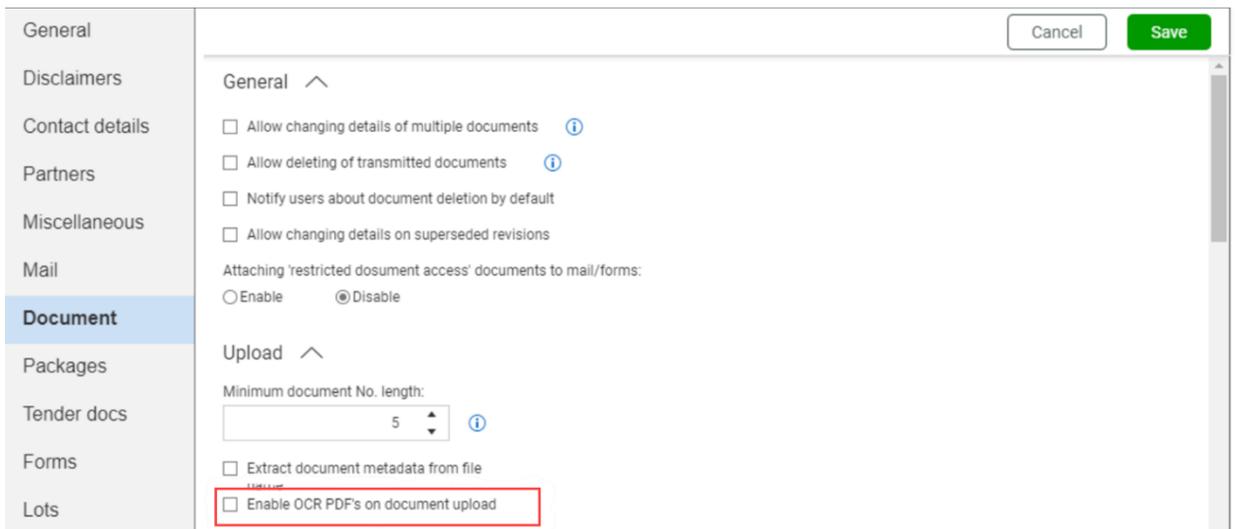
You can add or remove the available tags on the project from the Document register Actions > **Manage tags**.



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

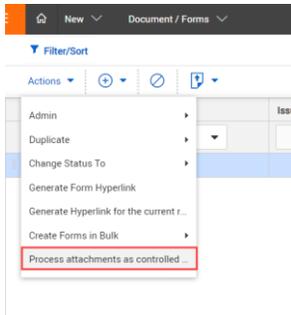
To enable the OCR process, go to Project settings>Document > **Upload**, and then select **Enable OCR PDF's on document upload**.



Forms

Process attachments and forms as PDFs

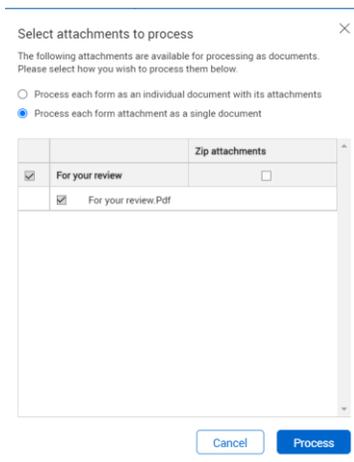
If a form has attachments, you can select **Process attachments as controlled documents** from the Actions menu on the Forms register.



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



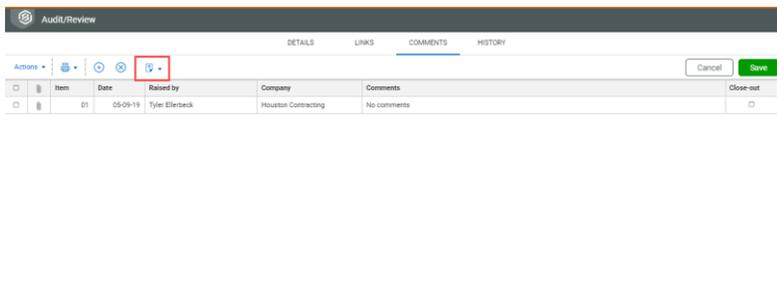
When you click **Attach as PDF file**, you can then select the attachments and indicate whether to process each form as an individual document with attachments or process each attachment as a single document in the Documents module.



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.



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.

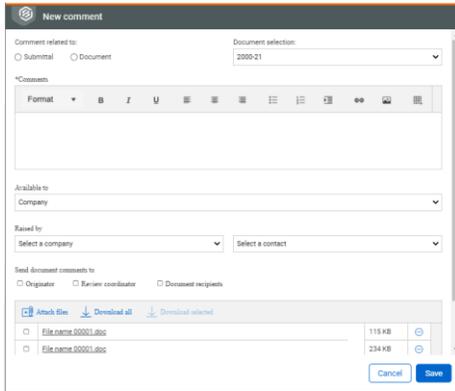


If you click No, the links are sent without notification. If you click Yes, The Generate transmittal page opens, and you can format the notification before sending the links.

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.



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.

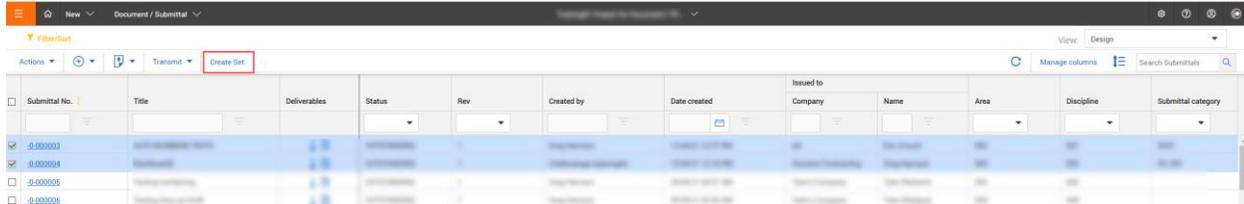
Project: HCC-031 - Submittal			
Project number:	TRAINING01		
Project title:	[Redacted]		
Date:	05 August 2021, 09:44:11 PM +1:00		
Submittal No:	2002-1		
Submittals			
Submittal No.	Title	Status	
2002-1	Submittal Title A	OUTSTANDING	
Deliverables			
Deliverable number	Description	Status	
DEV001	dev001	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
DEV002	2021-08-17-01-2021-08-17-03-1	Specification of item 4858	Under Review

Lots

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.



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



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.

Set ID	Submittal No(s)	Deliverables	Initiated date	Initiated by	Overall due date	Current stage	Current stage due date	Time in current stage	Comment
202-673-653	20002.1	2	20-07-2021	Frank Jacobs					
202-673-653	20002.2		20-07-2021	Frank Jacobs					
202-352-186	30003.1	3	18-07-2021	Frank Jacobs					
202-547-347	30003.2	2	17-07-2021	Frank Jacobs					
202-547-347	30003.3	5	17-07-2021	Frank Jacobs					

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

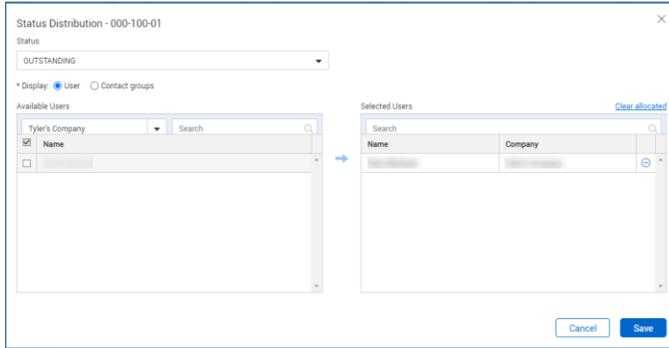
Lots

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.

Lot Types	Title	Status Distribution
000-100-001	Area A Lots	
000-200-001	Area B Lot	
000-300-001	Area C Lots	

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

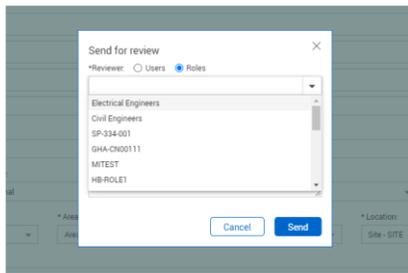


When the lot is in the specified status, the users or roles receive a notification of lot status change.

Mail

Send roles for review

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

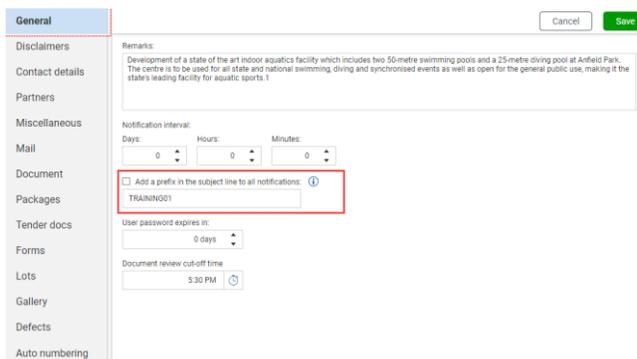


After you select the Role radio button, you can specify one role.

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.



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.