Document 21.12 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	08-DEC-2021	Initial publication

Contents

What's new in Document 21.12

- **Documents**

  - **New Initiated by column** – The Initiated by column has been added to the Manage workflow register (Documents > **Manage workflow**). The column shows the name of the person who initiated the workflow.

  - **Use Change Document Details to update the document number to an existing number** – You can now update the Document number in the Change Document Details to one that is already existing in the register. You can change the document number as long as the revision and status combination is available. If versioning is enabled, it can be the same revision/status combination and it uses the uploaded date to order the versions. Read more

- **Forms**

  - **Ability to remove workflows** – You can now remove a workflow from a form. Previously, you had to contact your InEight representative to remove a workflow. Read more

- **Packages**

  - **Bulk action improvements** – You can now perform updates in bulk for packages. Improvements have been made to the Sent box and the Drafts area to let you perform actions on multiple packages. Read more

- **Viewer**

  - **Link tab updates** – You can now see how a link was added to a document from a new column in the Links tab. Read more

- **Admin**

  - **Distribution warning message improvement** – When you add a person to distribution rule and there is a conflicting restricted document access rule, the warning message now includes a link that lets you open the rule with the conflict.

- **XL Upload**

  - **XL Upload enhancements** – The XL Upload has been enhanced for increased efficiency. Read more

Documents

Use Change Document Details to update the document number to an existing number

This enhancement lets you make this update if the revision/status combination is available. If versioning is enabled, it can be the same revision/status combination, and it uses the uploaded date to order the versions.

Forms

Ability to remove workflows

The Workflow steps configuration in Configure form types (Forms > Actions > Admin > Configure form types > **Workflow**) now includes the Delete workflow check box. When checked, the workflow steps are removed from the form.

Packages

Bulk action improvements

From the Actions menu on the Sent items or Drafts register, select **Admin**. The options for Sent items are as follows:

- Change package details
- Add recipients
- Make recipients inactive. Making recipients inactive ensures that they do not receive any updates to the package. You cannot remove them from the package because the package has been sent out.
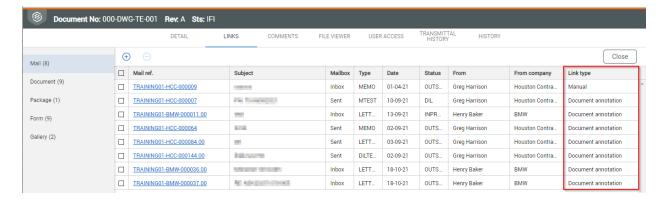
The options for drafts are as follows:

- Change package details
- Add recipients
- Remove recipients. Recipients can be removed because the drafts of the packages have not been sent yet.

Viewer

Link tab updates

The Link type column on the Links tab on the Documents page shows whether a link was added manually or from the file viewer annotation.

XL Upload

The following improvements have been made to XL Upload:

- XL Upload now runs as a process in the background, so you can continue with your other tasks.
- XL Upload now marks Holding area fields as mandatory at the time of validation.
- The Mandatory field error shows the fields that are missing information during validation.
- The upload prompt mimics what is defined in the web, based on the project settings for restrained and unrestrained documents.
- You can open documents for XL Upload, and they are automatically filtered to the documents that were just uploaded from XL Upload.