

Document 21.3 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-APR-2021	Initial publication

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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. [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](#)
- **Enhanced user interface** – The application's UI has been enhanced for the following modules to be consistent with other InEight applications.
 - Checklists
 - Gallery

Administration

Company history

To see company history, go to Contacts > **Companies**. In the list of companies, open a company, and then click the **History** tab.



Houston Contracting

DETAILS

OPTIONS

DOCUMENT ACCESS


UNREG NOTIFICATION

UPLOAD RULES





SINGLE SIGN-ON SETUP

HISTORY

Search all History



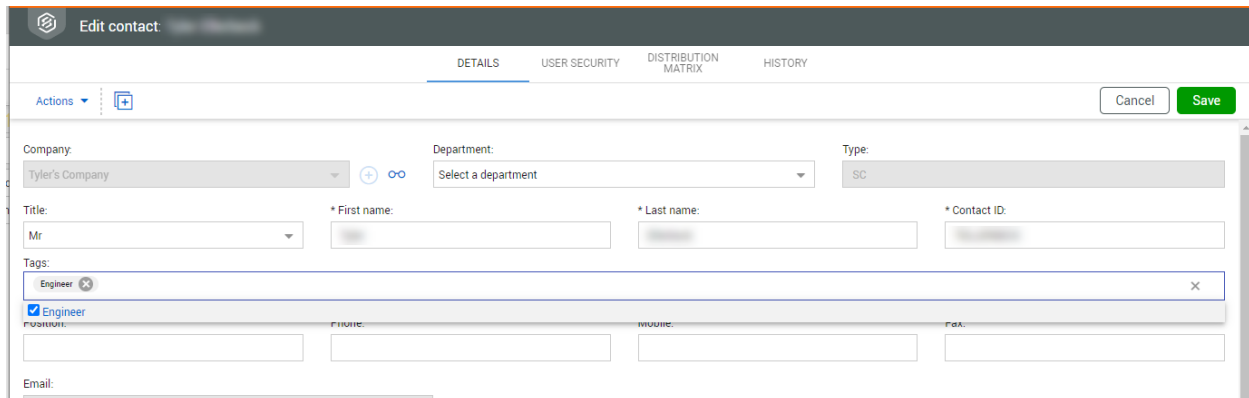
Close

Date	Event Type	Action By	Description
<div><div></div><div></div></div>	<div><div></div></div>	<div><div></div></div>	
05-04-21 02:38 PM	Changed Company Details	Greg Harrison (Houston Contracting)	<div>More Information ⓘ</div> <div><HCC> - <Houston Contracting> edited the following options.</div> <div>Changed <Provide users access to documents uploaded by their company> from <False></div>
24-02-21 12:05 AM	Changed Company Details	Greg Harrison (Houston Contracting)	<div>More Information ⓘ</div>
24-02-21 12:00 AM	Changed Company Details	Greg Harrison (Houston Contracting)	<div>More Information ⓘ</div>
04-01-21 07:06 PM	Changed Company Details	Greg Harrison (Houston Contracting)	<div>More Information ⓘ</div>

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 **Actions**. In the drop-down list, select **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.



Edit contact

DETAILS USER SECURITY DISTRIBUTION MATRIX HISTORY

Actions +

Cancel Save

Company: Tyler's Company Department: Select a department Type: SC

Title: Mr * First name: * Last name: * Contact ID:

Tags: Engineer

Engineer


First name: Last name: Contact ID:

Email:

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.

 Edit contact: Greg Harrison

DETAILS USER SECURITY DISTRIBUTION MATRIX **CONTACT GROUPS** HISTORY

Cancel Save

Contact groups

Search contact groups

<input type="checkbox"/>	Group ID	Title
<input type="checkbox"/>	ADMIN	Administration
<input type="checkbox"/>	CIVIL	Civil

Assigned contact groups [Clear allocated](#)

Search assigned contact groups


<input type="checkbox"/>	Group ID	Title
<input type="checkbox"/>	ADMIN	Administration

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Document rule history

To see document rule history, go to Settings > Admin > **Manage document rules**. In the list of rules, open a rule, and then click the **History** tab.

 Upload - CIV - Docs

DETAILS ALLOCATIONS HOLDING AREA FIELDS **HISTORY**

Search all History  Close

Date	Event Type	Action By	Description
07-04-21 03:53 AM	Document Rule Assigned (Company)	Greg Harrison (Houston Contract...	More Information 
07-04-21 03:52 AM	Upload Rule Created	Greg Harrison (Houston Contract...	More Information  Upload Rule < CIV - Docs > Created.

Items: 2

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Documents

Latest Transmittal No. field

If the Latest Transmittal No. column is not visible, you can manage columns to select it to be visible.

Information shown in the Latest Transmittal No. column depends on your permissions to see transmittals.

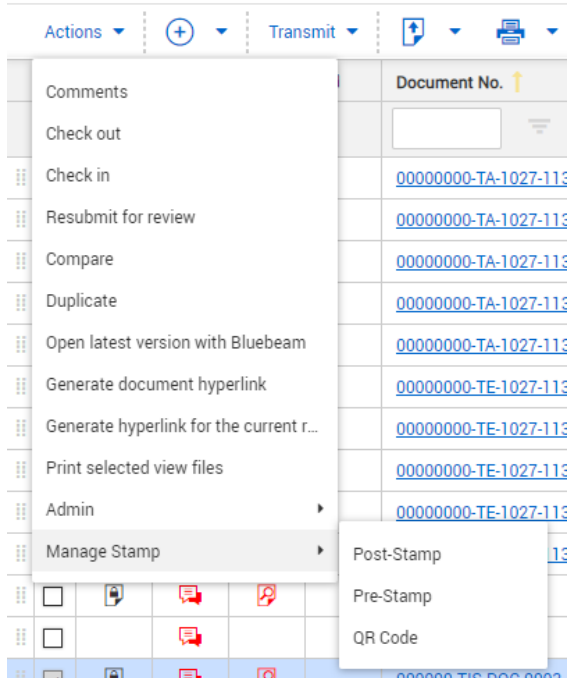
  

Document No. ↑	Rev	Sts	Latest Transmittal No	Document title	Discipline
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
111-GHA-DOC	C	IFI	TRAINING01-DES0243	111-GHA-DOC	ARCH
111-HV-0034	A	8MILE		111-HV-003	RDAD1
111-VVV1	K	KNCD1	TRAINING01-HCC-GHA-0157	111-333	MISC
111-VVV12	K	IFI	TRAINING01-HCC-GHA-0157	111-333	MISC
111-VVV12B	K	IFI	TRAINING01-HCC-GHA-0157	111-333	8MILES
111-VVV12MN	K	IFI	TRAINING01-HCC-GHA-0157	111-333	ARCH
111-VVV13	K	IFI	TRAINING01-HCC-GHA-0157	111-333	MISC
111-VVV4	K	IFI	TRAINING01-HCC-GHA-0157	111-333	MISC
11222	A	IFI		11222	ELEC

Manage QR codes

You can manually add a QR code to a document. Select a document, and then click **Actions**. 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.

