

Document 21.5 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	18-JUN-2021	Initial publication

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What's new in Document 21.5

- **Menu navigation:**
 - **Common navigation** – The common navigation used across all InEight cloud platform applications has been enhanced for ease of use. [Read more](#)
- **Viewer:**
 - **PDF enhancements** – The PDF viewer has a new look and feel along with improved markup and linking capabilities. Features include panes to search file text, view and manage comments, and view links. New linking functionality lets you drop a pin directly on the file to link to an existing item or create a new item from within the file. Annotations are now captured as standard comments against the document. [Read more](#)
- **Submittals:**
 - **New module** – The Submittals module lets you effectively manage the submittals process. It provides a centralized register to maintain reviews, statuses, communication, comments, and access for a project's submittals. Submittals are contractual documents that must be provided for external review or action, saving project man-hours and budget that might be spent on rework. [Read more](#)
- **Forms:**
 - **Create an issue in InEight Change** – You can now generate an issue in Change from a form and link the two items. This lets you create and track issues that result from processes in the Forms module. [Read more](#)
- **Documents:**
 - **Delegate review - limit added days** – You can now disable the ability to add days to the review duration when delegating a review to a parallel reviewer. This prevents issues with tracking an accurate due date caused by adding days. [Read more](#)
- **Administration:**
 - **History tracking** – There is now a full audit trail to track the changes made to the Configuration tables, Manage user access, Manage admins, and Project setting areas, similar to other areas in Document. [Read more](#)
- **Holding area:**
 - **Updates to reason for rejection** – To better define and report on rejections, this enhancement lets you track the reason for rejection as a configuration table and make it available as a field in the register. [Read more](#)
 - **Delete documents** – You can now delete documents from the holding area register. This is available only for documents that have not been transmitted.

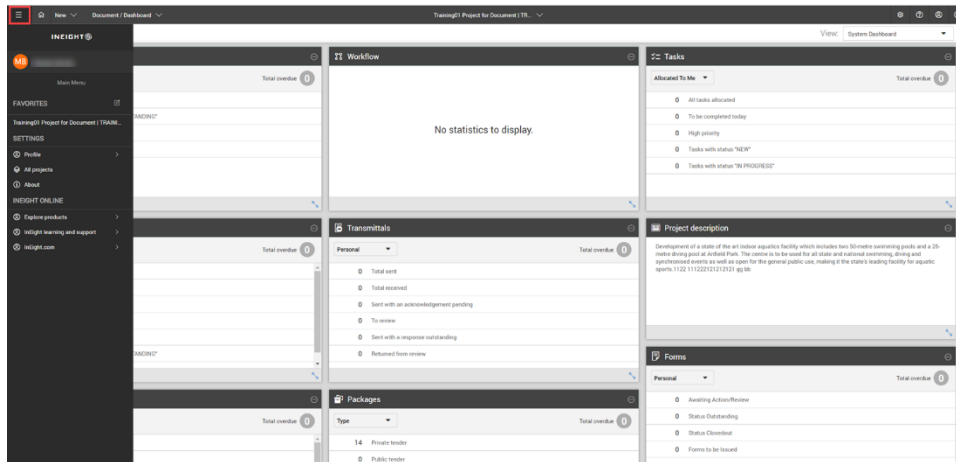
- **Packages:**
 - **Edit reason for issue** – This enhancement lets you update the Reason for issue after the package has been issued. You can change the Reason for issue field on the Sent packages register. You are also able to notify recipients that the field has changed.
- **Norwegian** – Document is now available in the Norwegian (Bokmål) language.

Menu navigation

Common navigation

The secondary navigation bar has been removed. New features on the main navigation bar have been added.

The Main menu on the far-left side contains organization and project information.

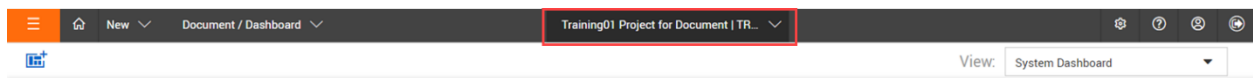


The Application and Module menus have been combined into a single menu. The Address book and Reports functions have moved from the secondary navigation bar to the Application/Module menu.



The holding area has been added under Documents in the menu navigation. You can still access the holding area through the Vendor data.

There is now a drop-down menu on the main navigation bar for quick links.



You can now sign out directly from the navigation bar without expanding the user profile menu by clicking the **Sign out** icon on the far-right side of the main navigation bar.



For more information about navigation, refer to the InEight Platform release notes.

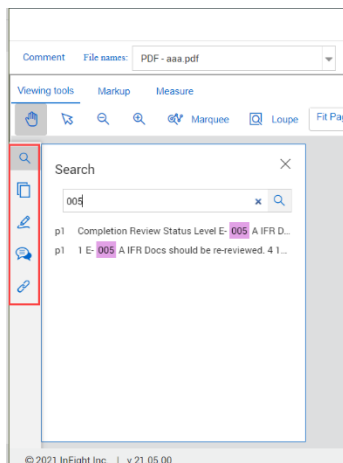
Viewer

PDF enhancements

The enhanced PDF viewer is available for new projects. If you want to use the new viewer for existing projects, contact your InEight representative.

The annotation feature has been improved to let you link an item at the annotation level. Previously, you could link an item to the PDF. Now when you mark up or annotate the PDF, you can click on the annotation and then link it to another item in Document, such as a form, mail, or another document.

A new search tools panel has been added to the PDF viewer. You can now search for text or get lists of thumbnails, annotations, comments, and links that have been added to the PDF.



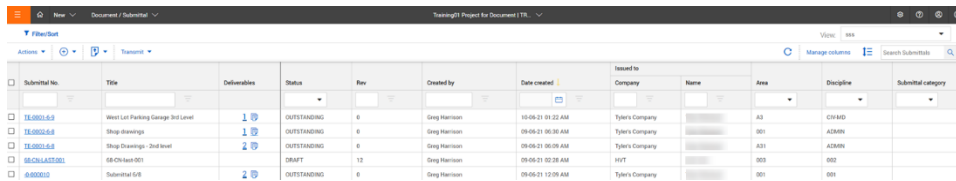
When working in the Markup tab, you can pick any area on the PDF and drop a pin. You can then link the pin to an item in Document or create a new item. To drop a pin, select the pin tool, and then click the location you want the pin. You can then click on the pin and link to another item in Document.



Submittals

Submittals are a key process on each project to track and review deliverables before starting construction. The submittals module lets you create and manage submittal dates, statuses, and reviews.

The Submittals register shows the submittals and their deliverables, status, revisions, and other information. From this register, you can add a submittal, export all items or selected items to a Microsoft Excel spreadsheet, or create a transmittal.



Submittal No.	Title	Deliverables	Status	Rev	Created by	Date created	Issued to Company	Name	Area	Discipline	Submittal category
16.0001-6.0	West/Lut Parking Garage 3rd Level	1	OUTSTANDING	0	Greg Harrison	09-06-21 01:22 AM	Tyler's Company		A3	CIVIL	
16.0001-6.0	Shop drawings	1	OUTSTANDING	0	Greg Harrison	09-06-21 01:26 AM	Tyler's Company		001	ADMIN	
16.0001-6.0	Shop drawings - Structural	2	OUTSTANDING	0	Greg Harrison	09-06-21 01:26 AM	Tyler's Company		A31	ADMIN	
06-01-01-001	06-01-01-001		DRAFT	12	Greg Harrison	09-06-21 02:28 AM	HVT		003	003	
06-0001-0	Submittal 0/0	2	OUTSTANDING	0	Greg Harrison	09-06-21 12:05 AM	Tyler's Company		001	001	

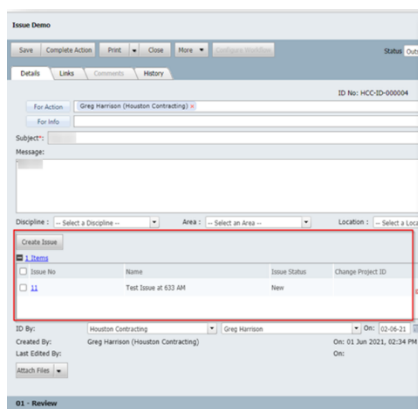
You can manage reviews from the Deliverables tab. You can add deliverable information, attach documents, and process or reject documents.

Forms

Create an issue in InEight Change

To implement this functionality, submit a request to enable it. Include the form type, project, and tenant ID in your request.

After the form type has been enabled, you can click the **Create Issue** button to create an issue in Change.



The screenshot shows the 'Issue Demo' form with a 'Create Issue' dialog box open. The dialog box has a 'Create Issue' button and a table with the following data:

Issue No.	Name	Issue Status	Change Project ID
11	Test Issue at 633 AM	New	

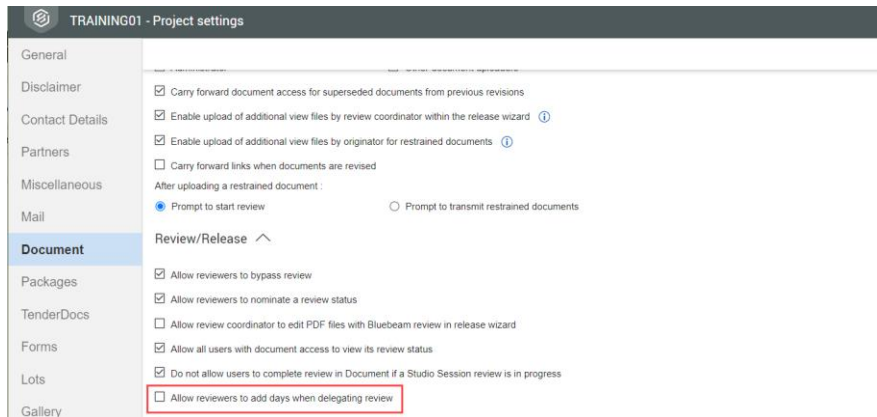
Below the table, there are fields for 'ID By', 'Created By', and 'Last Edited By', all set to 'Greg Harrison (Houston Contracting)'. The 'On' date is '01 Jun 2021, 02:34 PM'.

The Create a new issue dialog box opens, and you specify the issue name, issue date, and description. After saving, the issue can be viewed from the Change Issue log.

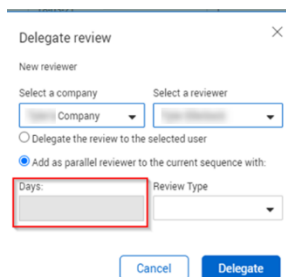
Documents

Delegate review - limit added days

A new setting, Allow reviewers to add days when delegating review, in Project settings > Document > **Review/Release**, lets you specify whether reviewers can add days to the review cycle when adding a parallel reviewer.



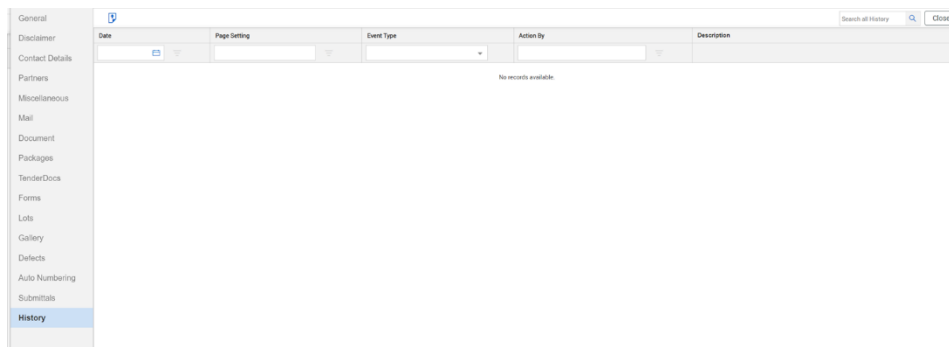
Select the box if you want to allow users to add days when delegating a review. When unselected, reviewers cannot add days to the overall current sequence when adding a parallel reviewer.



Administration

History tracking

The History tab was added to Project settings where you can see all changes that were made to the project settings. Fields include the date, page setting, event type, the person making the change and a description.



Similar pages for Manage admin, Configuration tables, and Manage user access have also been added.

- The manage admin history section is available to the primary admin only. To access the manage admins history go to Admin > Manage administrators > Actions > **History**.

- For Configuration tables, go to Admin > Configuration tables > Actions > > [select Field value] > **History**. The value of Field drop-down menu indicates the configuration table history shown.
- For Manage user access, go to Admin > Manage user access > Actions > **History**.

Holding area

Updates to reason for rejection

From the Application/Module menu, go to Vendor data > **Holding area**. You can reject documents by going to Action > **Reject**. The Reason field on the Reject Document dialog box now uses a drop-down list of reasons. When you select a reason, the Reason text field automatically populates. If you select Other as the Reason, the Reason text field is free text. The Reason and Reason text fields are required. Reasons for rejection are configured in Configuration tables > **Reason for Rejection**.