



Document 21.5 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	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. <u>Read more</u>
- 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. <u>Read more</u>
- 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. <u>Read more</u>
- 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. <u>Read more</u>
- 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. <u>Read more</u>
- 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. <u>Read more</u>
 - **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.

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Main Menu	Total overdue		Allocated To Me Total overdue	1
FAVORITES			0 All tasks allocated	11
Training01 Project for Document TPAINI			0 To be completed today	1
SETTINGS		No statistics to display.	0 High priority	
Profile			0 Taska with status "NEW"	
All projects			0 Taska with status "IN PROCRESS"	
① About				ш
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Explore products >				41
Intlight learning and support >	⊖ 🐻 Trar	smittals	Image: Project description C	41
② inlight.com →	Total overdue	• Total overdue	synchronised events as well as open for the general public use, making it the state's leading facility for aquatic	I
		Total sent	sports.1122 111222121212121 gg bb	17
		Total received	-	
		Sent with an acknowledgement pending		
		To review		1
		Sent with a response outstanding		11
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	ා 🕤 වි	ages	Awaiting Action/Review	1
	Total overdue	Total overdue	0 Status Outstanding	
	-	Private tender	0 Status Closedost	
		Private tender Public tender	0 Forms to be issued	I

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.

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Mail		•	Documents	Total overdue	Allocated To Me 📼	Total overdue
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Persor	a		Vendor data	Total overdue 🕕	Personal Total overside Total overside	includes two 50-metric swimming pools and a 25-
-		New coal	Address book		Total sent Total sent Total sent	making it the state's leading facility for equatic
			Reports		0 Total received	

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

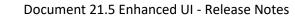
There is now a drop-down menu on the main navigation bar for quick links.

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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.

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





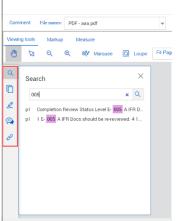
Viewer

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.



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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.



Forms

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Submittal No.	Title	Deliverables	Status	Rev	Created by	Date created	Company	Name	Area	Discipline	Submittal category	
			•			•			•	•	•	
TE-0001-6-9	West Lot Parking Garage 3rd Level	10	OUTSTANDING	0	Greg Harrison	10-06-21 01:22 AM	Tyler's Company		A3	CN-MD		
TE-0002-6-8	Shop drawings	1 🛛	OUTSTANDING	0	Greg Harrison	09-06-21 06:30 AM	Tyler's Company	and the second se	001	ADMN		
TE-0001-6-8	Shop Drawings - 2nd level	2 🕫	OUTSTANDING	0	Greg Harrison	09-06-21 06:09 AM	Tyler's Company		A31	ADMIN		
SE-CN-LAST-001	68-CN-last-001		DRAFT	12	Greg Harrison	09-06-21 02:28 AM	HVT		003	002		
0.000010	Submittal 6/8	2 😳	OUTSTANDING	0	Greg Harrison	09-06-21 12:09 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.

Save Complete Actio	n Print	Close	More •		5	Stat	hus O
Details Links	Comments	History					
						ID No: HCC-ID-000	0004
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Create Issue I Literns I soue No 11		Name Test Issue at 633	АМ	Select an Area	Issue Status		
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Create Issue 31.Items SSUE No 11 D By:	Houston Cort	Name Test Issue at 633 tracting	АМ		Issue Status	Change Project ID	6-21

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

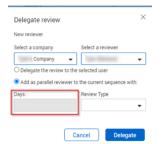
Delegate review - limit added days

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.



TRAINING	01 - Project settings
General	
Disclaimer	Carry forward document access for superseded documents from previous revisions
Contact Details	Enable upload of additional view files by review coordinator within the release wizard ()
Partners	Enable upload of additional view files by originator for restrained documents ()
Farmers	Carry forward links when documents are revised
Miscellaneous	After uploading a restrained document :
Mail	Prompt to start review O Prompt to transmit restrained documents
Document	Review/Release
Packages	Allow reviewers to bypass review
	Allow reviewers to nominate a review status
TenderDocs	Allow review coordinator to edit PDF files with Bluebeam review in release wizard
Forms	Allow all users with document access to view its review status
Lots	Do not allow users to complete review in Document if a Studio Session review is in progress
Gallery	Allow reviewers to add days when delegating review

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.

General	3						Search all History	۹	Close
Disclaimer	Date	Page Setting	Event Type		Action By	Description			
Contact Details	8		Ψ						
Partners			N	io reco	ords available.				
Viscellaneous									
Mail									
Document									
Packages									
FenderDocs									
Forms									
Lots									
Gallery									
Defects									
Auto Numbering									
Submittals									
History									

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**.