Document 21.7 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	02-SEP-2021	Initial publication

Contents

What’s new in Document 21.7

- **Submittals**
  - **Bulk import** – You can now import multiple submittals and deliverables through the web or Microsoft Excel import template. Read more
  - **Complete submission** – Previously, the issued-to company could progressively submit documents against the deliverables, but there was no mechanism to signal that they had completed the process. Now, this new option to complete the submission gives the managing company a clear indication that the issued-to company has completed submitting deliverables. Read more
  - **Deliverable documents** – Documents uploaded against deliverables no longer are forced into the holding area by default. Deliverable documents now go to either the document register or the holding area based on the defined project document rules.
  - **Milestone date configuration table** – A new configuration table has been added that lets you add new milestone dates which can also be added to submittal types. Read more
  - **Deliverable due date** – Scheduled, forecasted, and actual due dates are now available on the Details page for each deliverable. You can now track the due dates separately from the overall submittal milestone dates. Read more
  - **Milestone notifications** – You can now set reminders and overdue notifications for the submittal managers and issued-to users. The configuration includes options to configure the frequency and timing. Read more
  - **Reports** – Standard reports are available both at the submittal and deliverable levels.
  - **User Security tab** – The new User Security tab lets the managing company restrict access to each submittal. Permissions can either be granted to their entire company or for selected users or roles. Read more
- **Transmittals**
  - **Send roles for review** – You can now select a role when sending a transmittal for review. Selecting a role lets you send the transmittal to multiple people. Read more
- **Administration**
  - **Default user preferences** – You can now define default user preferences for a project that is inherited by newly created users. Read more
  - **Show roles as contact groups** – A new option to show roles as contact groups has been added. This lets you use roles as recipients on mail and transmittals. Read more
- **Lots**

- **History tab** – The History tab was added to the Lots module. You can now see the audit trail of the changes made to Lots.

- **Mail**
  - **Disable file attachments by mail type** – A new security group option lets you enable or disable file attachments per mail type by security group. Read more
- **Documents**
  - **Automatic document number linking** – Document now automatically scans an OCR PDF for document numbers and inserts a hyperlink that goes to that document. Read more
  - **Show vendor transmittals** – The transmittal history has been updated to include all vendor transmittal types.
  - **Remove vendor transmittal restriction** – The restriction that prevents documents from being included on a vendor transmittal type multiple times has been removed.
  - **Modify review coordinator due date** – An option has been added that lets you add extra days remaining from the document reviewers to the reviewer coordinator’s due date. Read more
  - **Allow roles in Bluebeam studio** – You can now select roles when using document reviews with the Bluebeam studio integration. Previously, the Roles option had been unavailable.
- **Packages**
  - **Add documents Custom fields** – Custom fields are now shown when adding documents to packages. When you add revised documents to a package, you now see custom fields in the Add documents dialog box search results.

Submittals

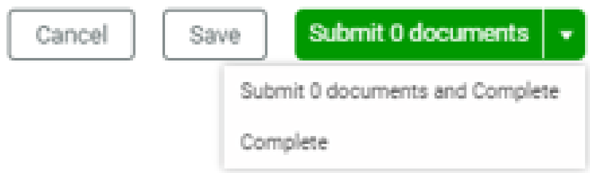
Bulk import

To import submittals and deliverables, click the **Import** icon. The Import Submittals dialog box opens, and you can then select **Submittals** or **Deliverables** from the Type drop-down menu. You then have the option to manually add deliverables or submittals or download an Excel import template. The import template lets you quickly enter submittals or deliverables information, and then you can upload the template to the Import Submittals dialog box.

You can combine submittals and deliverables in the Import Submittals dialog box. When you have entered all the import items, click **Validate**, and then **Save**. Each line creates a submittal or deliverable in the Submittals or Deliverables register.

Complete submissions

When a user at the issued-to company submits a deliverable, they can now choose to submit the document and complete or just complete the document when they click the **Submit documents** button.



The completion sends a notification to the managing company that provides a clear indication the issued-to company has completed the submission.

Milestone date configuration table

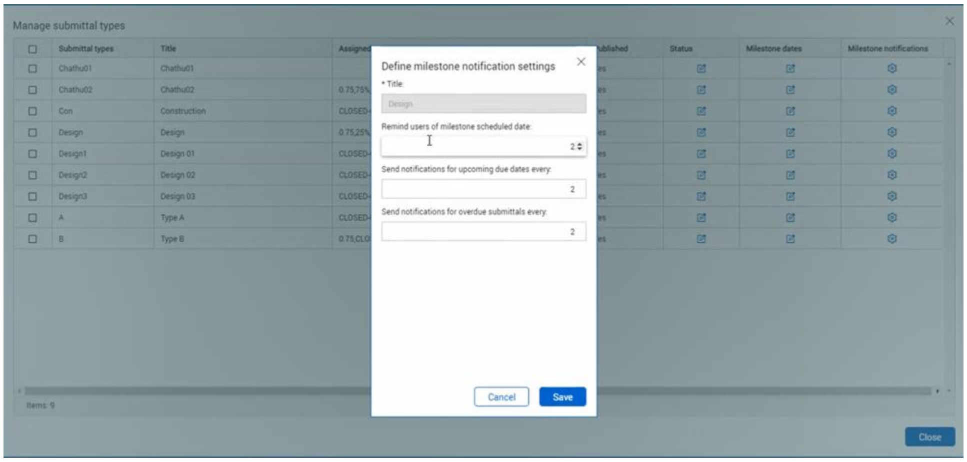
Go to Settings > Admin > **Configuration tables**, and then select the **Milestones** field. You can then add your own milestones.

Deliverable due date

The Deliverable dates section has been added to the deliverables Details page. You can use the section to enter the scheduled, forecasted, and actual due dates. These dates are for reference only.

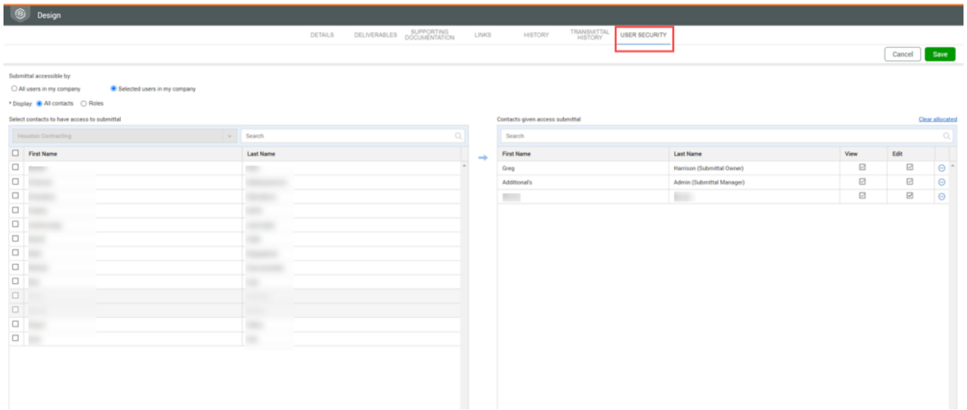
Milestone notifications

From the Submittals page, go to Actions > Admin **> Manage submittal types**. The Manage submittal types dialog box opens. A new column, Milestone notifications has been added. To configure milestone notifications, click the **Settings** icon in the Milestone notifications column for the submittal type. You can then use the Define milestones notification settings to configure the frequency to send notifications for upcoming and overdue submittals milestones.



User Security tab

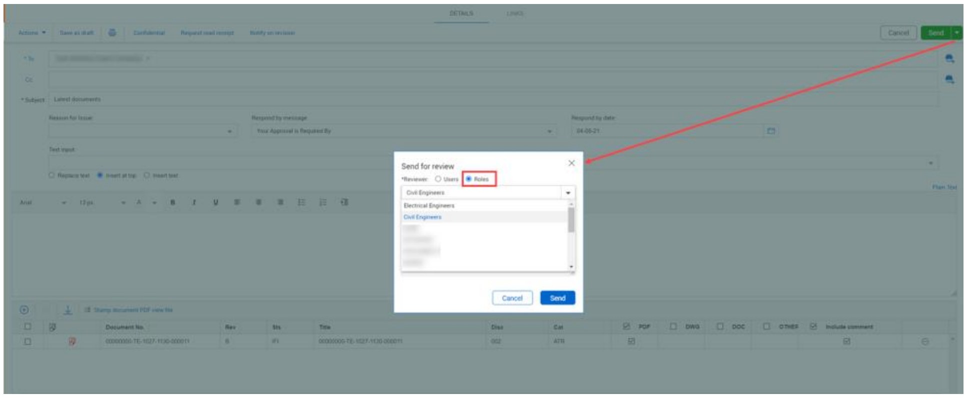
You can specify whether each submittal is accessible to all users in the managing company or selected users. If you choose selected users, you can then specify the users or roles.



Transmittals

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.

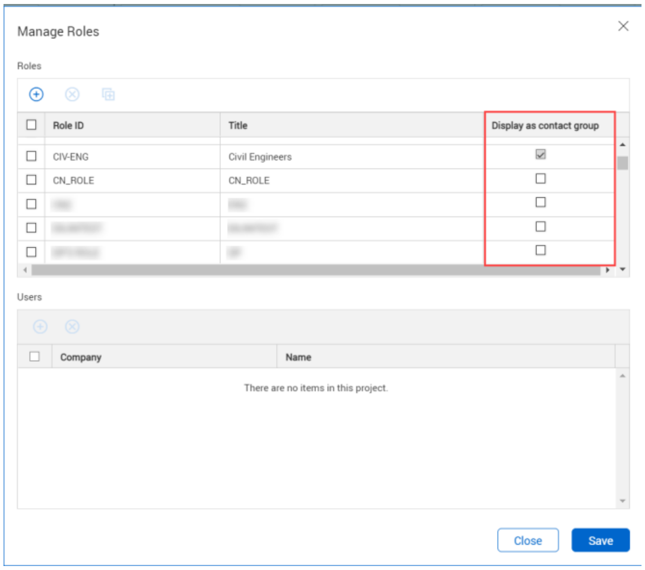
Administration

Default user preferences

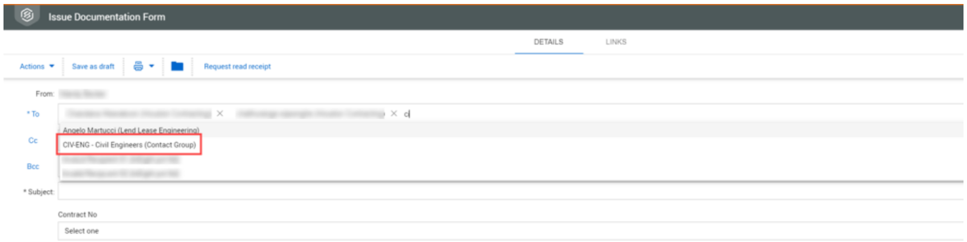
The User preferences tab has been added to the project settings. The user preference settings are now available for a project. When you add a new user, they inherit the settings. Setting the user preferences at a project level is particularly helpful with the notification settings. You can then control who gets particular notifications.

Show roles as contact groups

A contact group is used as a role-based distribution list you can use when you create mail or a transmittal. You can create a contact group from any role in your address book by selecting the new **Display as contract group** setting in the Manage roles dialog box (Contacts > Address book > Contacts > Actions > **Roles**).



After a contract group is created, it becomes available in the To field of a new transmittal or mail.



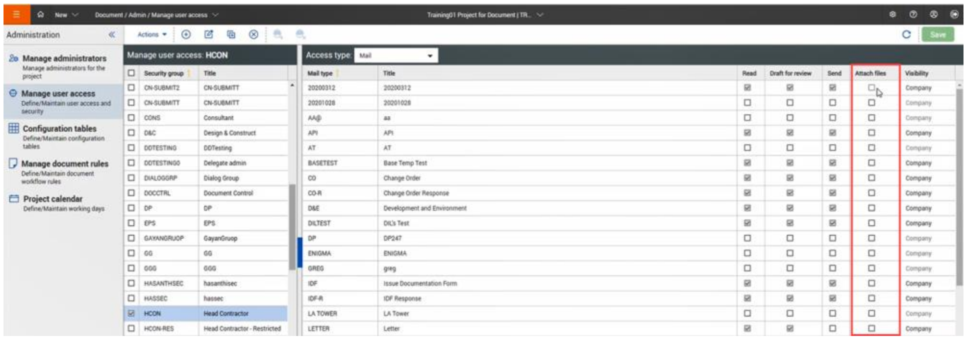
After the group is selected, the names of the people in that role populate the To field.

Mail

Disable file attachments by mail type

Although there are settings to control who can attach files at the module level and mail type level, you can now specify whether the users in a group for a mail type can add attachments.

To enable or disable the ability to attach files, go to Admin > **Manage user access** and then select a security group and the mail access type. The Attach files column lets you enable or disable the ability to attach files for each mail type.



When the Attach files check box is selected, the users in the security groups can attach files to the mail type. When it is not selected, the users in the security group cannot attach files, regardless of the settings at the module and mail type level.

Document

Automatic document number linking

When you upload a PDF with searchable text (OCR), Document searches for the text for document numbers that correspond to documents in the register. When it finds the matching text, it creates a hyperlink. Click the document number to go directly to the corresponding document.

Note: Contact your InEight representative to enable this feature.

Modify review coordinator due date

Previously when the review teams took less than the allotted time to finished, the time saved could not be added to the review coordinator's due date. Now, a new project setting, Recalculate Review Coordinator's release required date (Settings > Project Settings > Document > Review/Release > **Recalculate Review Coordinator's release required date**) lets you specify whether to recalculate the review coordinator's time. You can choose to recalculate always, recalculate only if overdue, or never recalculate.