

Document 22.2 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	15-FEB-2022	Initial publication
1.1	16-FEB-2022	Updates

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What's new in Document 22.2

- **Documents**
 - **Vendor data filters** – You can now filter the Documents register and holding area based on the metadata of a linked deliverable or purchased item. [Read more](#)
 - **Filter based on link type** – You can now filter documents based on a linked item type. [Read more](#)
 - **Download file prior to consolidation** – Some projects require the ability to download or export each document that contains all review comments and markups made during the review workflow but prior to the consolidation of the markups and comments and subsequent release of the document. [Read more](#)
 - **Download file with annotations** – When you download a document, you now have the option to download with or without markups. This option is available when you download a single document. [Read more](#)
 - **Change private comments to public** – Review coordinators and administrators can now change private comments to public after the document has been released. Previously, you had to choose which comments to publish with the document but would then have to open a ticket with InEight to change unpublished private comments to public. [Read more](#)
 - **Download documents in bulk from the Document Review page** – You can now download multiple documents from the Document Review page. Previously you had to download documents one at a time. [Read more](#)
 - **Apply review statuses in bulk during release** – Review coordinators can now apply review statuses in bulk when releasing documents. Previously, the review coordinator had to apply each review status individually. [Read more](#)
- **Viewer**
 - **Edit text in a text box annotation** - You can now edit text that you entered in the text box markup, so you can fix errors in annotations. Previously, if you made a mistake, you would have to delete the markup and add a new one.
- **Submittals**
 - **Group items on Submittals register** – You can now group the Submittals register by available register columns to help you quickly locate submittals. [Read more](#)
 - **Delete or cancel submittals** – You can now cancel in-progress submittals and delete draft submittals from the register. [Read more](#)
 - **Issue submittals in bulk** – You can now select multiple submittals from the register to issue in bulk. The issued-to company can also be assigned or defined in bulk. [Read more](#)
- **Packages**

- **Decline Addendum notification** – You can now omit documents from the addendum and remove the current indicator in the register. You can use this feature when new revisions to a document in a package does not require an update to the package or an addendum notification. [Read more](#)
- **Define filter to set flag** – You can now define a filter condition for linked items by user or company. If an item meets the condition, a flag is added to the package register entry. A new Flag column has been added to the Sent items and Draft registers. [Read more](#)
- **Vendor data**
 - **Link deliverable line items** – You can now link deliverable items from the document instead of having to link from the deliverable items. When you add a document in the Vendor data holding area, you now link to the deliverable from the holding area document.
- **Registers**
 - **Clear all filters option add to all registers** – You can now clear all filters on a register with a single action instead of clearing each filter individually. [Read more](#)

Documents

Vendor data filters

Although the metadata fields do not show in the Documents register you can enter them in the filter criteria.

The Module column has been added to the filters. Values for the module are Document, Purchased items, and Deliverable items. When you select Deliverable items or Purchased items as the module, the Column values update to the fields for the item. You can then enter a value representing the deliverable or purchased item. When you click **Apply**, all the items for the deliverable or purchased item are shown.

Filters ✕

Show : New Documents ▼

Filter by:

	Module	Column	Operator	Value (i)
+	Document ▼	Comment No.	Contains	01 ✕
+	AND Document ▼	Select one...	Is equal to	Select some items ▼ ✕
+	AND Document ▼	Select one...	Is equal to	Select some items ▼ ✕
+	AND Purchased items ▼	Select one...	Is equal to	Select some items ▼ ✕
+	AND Deliverable items ▼	Select one...	Is equal to	Select some items ▼ ✕
+	AND Document ▼	Select one...	Is equal to	Select some items ▼ ✕

Sort by: Column

+	Comment No. ▼	Ascending order	Descending order	✕
+	THEN Select one... ▼	Ascending order	Descending order	✕
+	THEN Select one... ▼	Ascending order	Descending order	✕

Reset
Apply

Filter based on link type

Link type has been added to the Column field in the document filters to let you enter link types, such as Mail, so you can filter on it.

Filter and sort

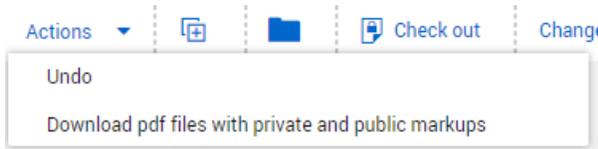
Show: All Documents that I can downlo...

Filter by:	Module	Column	Operator	Value
+	Document	Link type	Equals	Document
+ AND	Document	Select one...	Select one...	<input type="checkbox"/> Mail - Inbox
+ AND	Document	Select one...	Select one...	<input type="checkbox"/> Mail - Sent
+ AND	Document	Select one...	Select one...	<input checked="" type="checkbox"/> Document
+ AND	Document	Select one...	Select one...	<input type="checkbox"/> Transmittals
+ AND	Document	Select one...	Select one...	<input type="checkbox"/> Package - Inbox
+ AND	Document	Select one...	Select one...	<input type="checkbox"/> Package - Sent
+ AND	Document	Select one...	Select one...	<input type="checkbox"/> Forms

Sort by: Column

Download file prior to consolidation

To download with the review annotations from document details, expand the **Actions** menu, and then select **Download pdf files with private and public markups**.



The PDF and FDF files are provided in a zip file. Follow these steps to download the markups:

1. Extract the zip file.
2. Open the FDF file.
3. When prompted to select a file to merge with, select the PDF file in the zipped file.

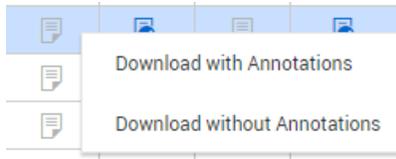
Document markups are then merged into the original PDF.

Note: This option is available in the PDF viewer only and is only supported with Adobe.

Download file with annotations

When you download an individual document from the register, you now have the option to download with or without markups. The ability to select this option in bulk downloads will be addressed in a future release.

To download a single document without markups from the register, click the **Download view files** icon in the PDF column, and then select **Download with Annotations**.



The PDF and FDF files are provided in a zip file. Follow these steps to download the markups:

1. Extract the zip file.
2. Open the FDF file.
3. When prompted to select a file to merge with, select the PDF file in the zipped file.

Document markups are then merged into the original PDF.

Note: This option is available in the PDF viewer only and is only supported with Adobe.

To download multiple files without markups, select the documents in the register, and then click **Download**.

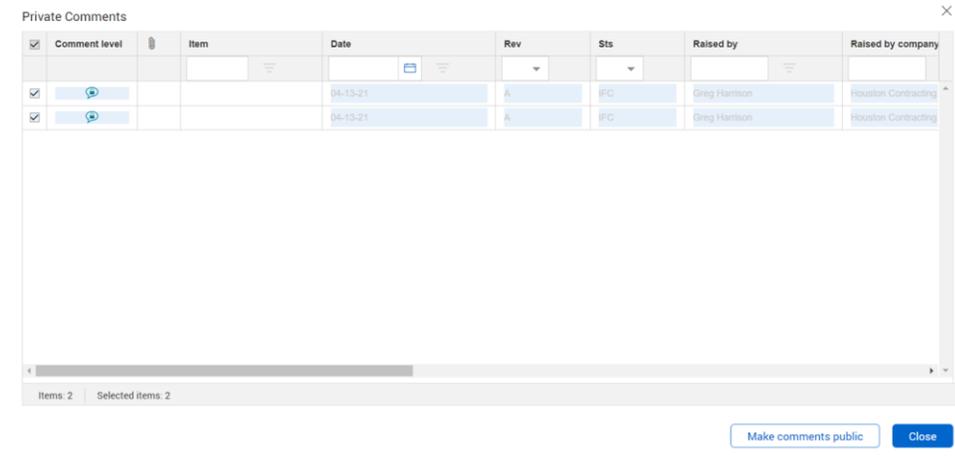
Change private comments to public

If you mistakenly chose to not publish a comment, you can now mark the unpublished private comments as public.

When you are on the Comments tab, you can expand the **Actions** menu, and then click **View private comments** to see a list of all comments that have not been published.

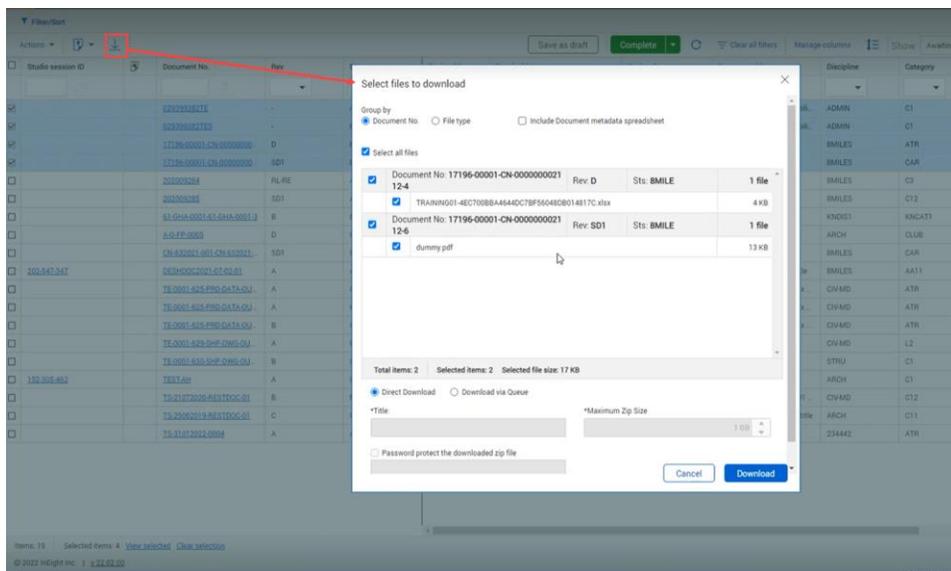
Item	Date	Rev	Sts	Raised by	Raised by company	
<input type="checkbox"/>	14	12-02-21	A	IFC	Greg Harrison	Houston Contracting
<input type="checkbox"/>	13	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	12	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	11	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	10	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	09	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	08	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	07	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	06	07-19-21			Greg Harrison	Houston Contracting
<input type="checkbox"/>	05	07-14-21			Greg Harrison	Houston Contracting

You can select the comments you want to make public, and then click **Make comments public**.



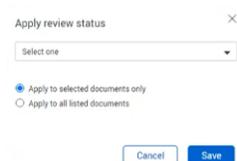
Download documents in bulk from the Document Review page

To download multiple documents, select the documents on the Review page, and then click the **Download** icon. The Select files to download page opens where you can select files and download.



Apply review statuses in bulk during release

When you want to approve multiple documents, you can now select them from the Document > **Release** page, and then click Actions > **Apply review status**. The Apply review status dialog box opens, and then you can select the status. You can apply the status to the selected documents only or to all documents in the view.



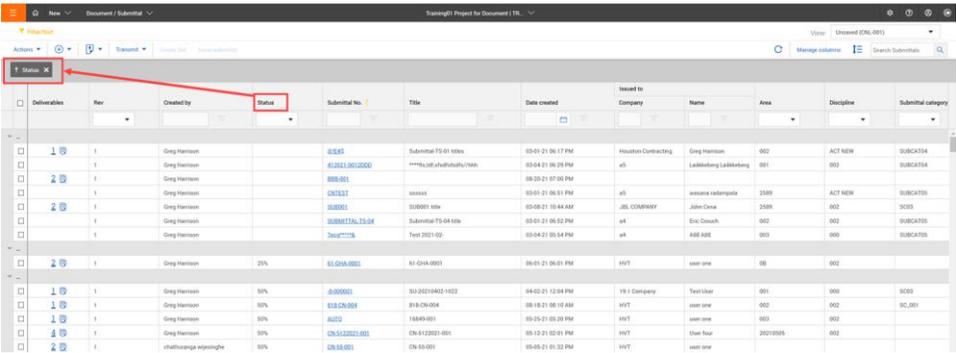
Submittals

Click **Save** to apply the status.

Submittals

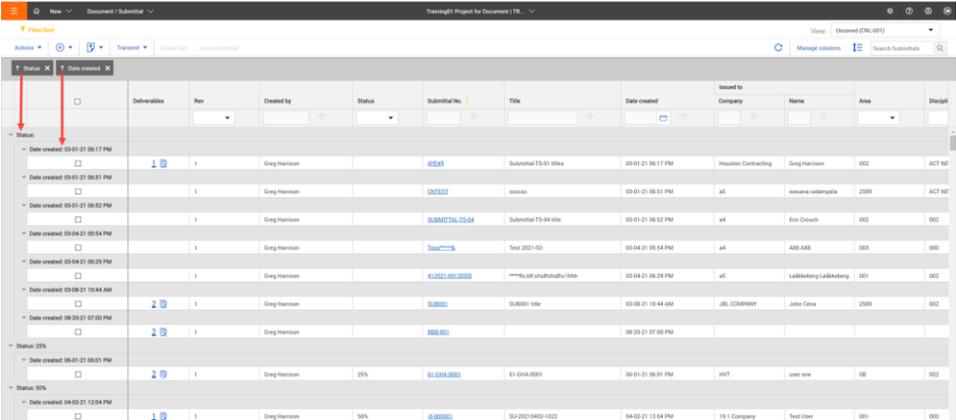
Group items on Submittals register

A grouping tool has been added to the Submittals register. The tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Status column to the bar, the submittals are grouped by status. In the image below, the submittals are grouped by status in ascending order. The submittals with no status come first, followed those with 25% complete and then those with 50% complete.



You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the submittal you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The submittals are grouped in the order the headings are placed in the tool. For example, if you were to add the Date created column to the scenario above, the submittals would be grouped by status and then creation date within the status.



Delete or cancel submittals

If you have mistakenly issued a submittal, you can now cancel it. When you cancel the submittal, the record is locked, and you cannot edit information or upload deliverables. To Cancel an issued submittal, select the submittal in the register and then expand the **Actions** menu and select **Cancel**.

When you cancel a submittal, you are prompted to specify whether the issued-to company is notified that the submittal has been canceled.

By default, the canceled submittal is omitted from the register. A filter condition, Show canceled submittal, has been added so you can show canceled submissions in the register.

You can also delete draft submittals. To delete a draft, select a submittal that is in draft status, and then expand the **Actions** menu and select **Delete**. The submittal is deleted from the register.

Issue submittals in bulk

To issue multiple submittals, select one or more submittals from the Submittals register, and then click **Issue submittals**.

Filter/Sort

Actions Transmit Create Set **Issue submittal**

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Submittal No.	Title	Deliverables	Status	Rev	Created by
<input checked="" type="checkbox"/>	000CWCHANDANA	000CWChandana		OUTSTANDING	23231	Greg Harrison
<input checked="" type="checkbox"/>	127-SUB-0001	127-SUB-0001		DRAFT		Greg Harrison
<input checked="" type="checkbox"/>	127-SUB-0001	127-SUB-0001		DRAFT		Greg Harrison

Packages

Decline addendum notification

The Ignore check box has been added to the Add documents dialog box. When you add revised documents to a package, you can select the Ignore check box when you want to ignore a revision. You can also specify whether to ignore the current revision only or all future revisions. When selected, the addendums are not sent, but the Addendum column of the register is updated, and the icon is no longer shown.

Add document ✕

Search criteria for Documents Show search

Search results Show documents in: Revised Hide results Show ignored

<input type="checkbox"/>	Document No. ↑	Contract No	Review Staus		Ignore	Future Revision
<input type="checkbox"/>	00000000-TE-1027-11...		Un-Restrained		<input checked="" type="checkbox"/>	Current revision
<input type="checkbox"/>	00000000-TE-1027-11...		Un-Restrained		<input type="checkbox"/>	Current revision
<input type="checkbox"/>	00000000-TE		Un-Restrained		<input type="checkbox"/>	All future revisions

Define filter to set flag

You can define alert flags from your Sent Items register from the Actions menu (Actions > Admin > **Define alert flags**).

Define filter ✕

Search criteria for: Forms ▼

Show: Personal ▼ All forms Awaiting action/review

Show cancelled forms

Filter by: Column Operator Value

Form Status ▼ Equals ▼ 01 - AM COM... ✕
 AND Select one... ▼ Select one... ▼ 01 - AM COMME... ✕
 02 - DT COMMEN... ✕
 03 - PE REVIEW -...
 04 - PV REVIEW -...
 05 - RMS REVIE...

You can then define a condition. If any of the documents or items linked to the documents in the package in the register meet the condition, a flag is added to the register. For example, you can set a condition for a form. If a document has a linked form that happened after the package is created, a flag is added to the register. You can then click on the flag to display the items that triggered the flag.

<input type="checkbox"/>		Type	Package ID	Title
<input type="checkbox"/>		Tender	127-0001	7202121-001
<input type="checkbox"/>		Standard	MK-666	MK-666

You can clear the flag by clicking **Clear alert flag**.

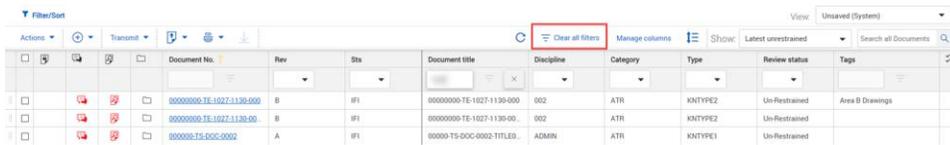
Flagged links for MK-444

Form (1)	Clear alert flag	
	Form Ref.	Subject
	HCC+0168	[Redacted]

Registers

Clear all filters option added to all registers

The Clear all filters button has been added to all registers. You can click this button to clear all filters that have been applied to the register to see all items.



Document No.	Rev	Sits	Document title	Discipline	Category	Type	Review status	Tags
00000000-TE-1027-1130-000	B	#F1	00000000-TE-1027-1130-000	002	ATR	XNTYPE2	Un-Restrained	Area B Drawings
00000000-TE-1027-1130-000	B	#F1	00000000-TE-1027-1130-000	002	ATR	XNTYPE2	Un-Restrained	
00000015-D0C-0002	A	#F1	00000015-D0C-0002-TITLES	ADMIN	ATR	XNTYPE1	Un-Restrained	