

Document 22.6 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	17-JUN-2022	Initial publication
2.0	22-JUL-2022	Final version

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What's new in Document 22.6

- **Documents**
 - **Download documents from the Links tab** – You can now download documents directly from the Links tab. Previously you had to open the document. [Read more](#)
 - **Group items on the Review, Release, and Manage workflow registers** – You can now group the Review, Release and Manage workflow registers by available register columns to help you quickly identify the items you need. [Read more](#)
 - **Download PDF files included in annotations via bulk download** – You can now include PDF files with annotations when you use the bulk download function on the Documents register. [Read more](#)
 - **Registers Select all option** – The option to select all entries has been added to the Document register. [Read more](#)
- **Viewer**
 - **Markup filtering** – When you filter annotations, the filtering is now applied to the markups in the viewer. Only the annotations that meet the filter criteria are shown in the viewer. Previously, the filter was applied only to the Comments and Annotations pane.
 - **Viewer table of contents and document navigation** – A table of contents and Previous and Next buttons have been added to the PDF viewer. These enhancements let you go to another document without having to open another tab and reopen the register. [Read more](#)
- **Submittals**
 - **Disable deliverables in submittals** – You can now upload and track documents directly to submittals rather than in deliverables. [Read more](#)
 - **Remove transmittal restrictions from submittals** – You can now transmit the submittal at any time. Previously you could only transmit the submittal when the submittal was closed out.
- **Forms**
 - **Include section data for form types** – You can now apply a filter when exporting forms in bulk. When using the filter, the export includes the section data for each form. [Read more](#)
 - **Disable notification when user is made inactive** – You can now disable notifications when recipients are made inactive on forms where you are also a recipient. [Read more](#)
- **Administration**
 - **Remove an existing number scheme** – You can now delete an autonumbering scheme that had been previously defined for a project. [Read more](#)

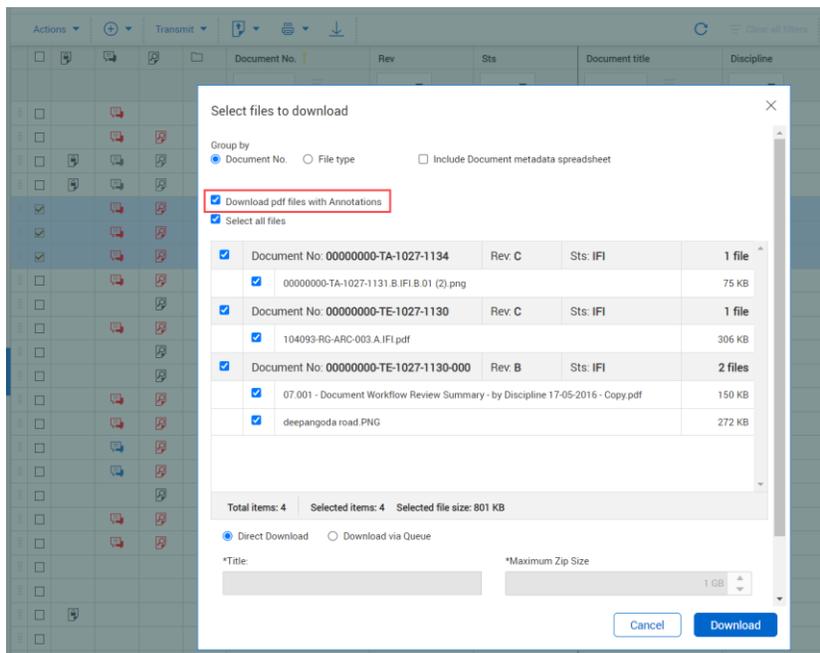
- **Manage users in document rules in bulk** – You can now add, remove, or replace users in document rules and free-form review teams in bulk. [Read more](#)
- **Copy attributes from a reviewer to other reviewers** – You can now copy attributes to other reviewers in a review team to save time after adding reviewers on the Review Team tab. [Read more](#)
- **Address book**
 - **Manage roles in bulk** – You can now add, remove, or replace users in roles or free form review teams in bulk in the contacts address book. [Read more](#)
 - **Global address book status** - You can now verify the global address book status of a contact or company in the address book and relink it if needed. Sometimes updating an entry in the Address book in a project can break the link to the global address book. Now, if the contact or company is unlinked from the global address book, you can relink it. [Read more](#)
- **Transmittals**
 - **Download files with annotations** – You can now download PDF files included in transmittals with annotations. The option to download with or without annotations has been added to the Download all and Download selected menus on the Transmittal download page.
- **Lots**
 - **Folder structure has been added to the Lots register** – Standard smart and dynamic folders have been added to the Lots register.
 - **Bulk upload** – You can now add lots in bulk to the Lots register. You can upload via web or Microsoft Excel template. [Read more](#)

column to the scenario above, the items would be grouped by status and then discipline within the status.

	Document No.	Rev	Sts	Review status	Review history
Sts: IFC					
Discipline: ARCH					
<input type="checkbox"/>	A-G-FP-0005	D	IFC		
Sts: IFR					
Discipline: 8MILES					
<input type="checkbox"/>	CN-632021-001-CN-632021-...	SD1	IFR		
Discipline: CIV-MD					
<input type="checkbox"/>	TE-0001-625-PRD-DATA-OU...	A	IFR		
<input type="checkbox"/>	TE-0001-625-PRD-DATA-OU...	A	IFR		
<input type="checkbox"/>	TE-0001-625-PRD-DATA-OU...	B	IFR		
<input type="checkbox"/>	TE-0001-629-SHP-DWG-OU...	A	IFR		
Discipline: STRU					
<input type="checkbox"/>	TE-0001-630-SHP-DWG-OU...	B	IFR		

Download PDF files with or without annotations via bulk download

The Download pdf files with Annotations check box has been added to the Bulk download page.



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

Viewer

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.

Registers Select all option

When there are 1000 or fewer entries in the register, you can click **Select all items** at the bottom of the page to select all entries. The button is disabled when there are more than 1000 entries.

<input type="checkbox"/>				TRAINING01-SCHED-000017	A	IFI
<input type="checkbox"/>				TRAINING01-SCHED-000018	A	IFI
<input type="checkbox"/>				TRAINING01-SCHED-000019	A	IFI
<input type="checkbox"/>				TRAINING01-SCHED-000020	A	IFI
<input type="checkbox"/>				TRAINING01-SCHED-000021	A	IFI

Items: 537 | Selected items: 0 | [View selected](#) | [Clear selection](#) | [Select all 537 items](#) ⓘ

Viewer

Viewer table of contents and document navigation

The Table of contents has been added to the left side toolbar in the PDF viewer. When you click the **Table of contents** icon, a list of all documents in the register is shown. You can then select a document from the list and open it in the current window instead of going back to the Documents register to open it.

The Previous Document and Next Document buttons have been added to the top toolbar, so you can open the next or previous documents in the register from the viewer.



Submittals

Disable deliverables in submittals

The Disable deliverables check box has been added to the Submittals tab in Project settings. When you select the **Disable deliverables** check box, documents are uploaded and tracked directly against submittals.

The layouts of the Submittals register and other tabs in the Submittals modules vary based on whether the project settings have deliverables enabled or disabled. When deliverables are disabled, the register shows a Documents column, and documents are associated directly to the submittal.

Submittal No.	Title	Documents	Status	Rev	Created by	Date created	Issued to Company	Name	Area	Discipline	Submittal category
NEW_DOCUMENT	New document		DRAFT	A	Greg Harrison	05-27-22 01:47 PM	Tyler's Company	Tyler Test	476	ARCH	
SUBMIT001	Electrical Shop Drawings	2	OUTSTANDING	A	Greg Harrison	05-05-22 09:43 AM	Tyler's Company	Tyler Test	1.0	ELEC	
TEST001	Test submittal	1	OUTSTANDING	A	Greg Harrison	05-05-22 08:54 AM	Tyler's Company	Tyler Test	02		
TEST002	Testing submittal		OUTSTANDING	A	Greg Harrison	05-05-22 08:57 AM	Tyler's Company	Tyler Test	02		

When you open a submittal, the Documents tab replaces the Deliverables tab. You can use the Documents tab to link documents to the submittal.

Forms

Include section data for form types

If a specific form type has been selected in the Type drop-down list on the register, the Export process exports the section data. Only one form type at a time can be exported in this manner.

Form Ref	Type	Created
TEST002	001	04-19-22 02:56 AM

Disable notification when user is made inactive

The Notify when recipients are made inactive in forms where I am a recipient check box has been added to User preferences > **Form options**. If you do not want to receive these notifications, deselect the check box.

User Preferences

[HOME](#)
[AUTO FORWARD](#)
[NOTIFICATIONS](#)
[TASK STATUS](#)
[FORM OPTIONS](#)
[INTEGRATION](#)

Attaching forms

Attach form as PDF document, when processed as document

Never attach
 Prompt to attach
 Always attach

Notify when recipients are made inactive in Forms where I am a recipient

Apply to all projects

Administration

Remove existing number scheme

The Auto Numbering settings (Project settings > **Auto Numbering**) now include the Delete icon in the Key prefix column for each module.

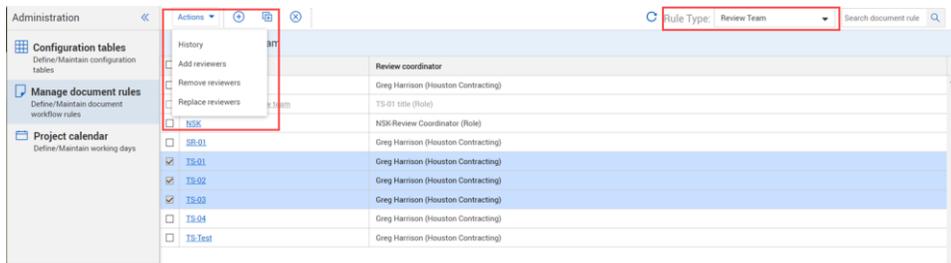
TRAINING01 - Project settings

Module	Trigger	Key prefix	Display format	Show Trigger
<input type="checkbox"/> Document	AUTO	[FromCompID][Discipline]	[FromCompID][Discipline]###	<input type="checkbox"/>
<input type="checkbox"/> Mail				<input type="checkbox"/>
<input type="checkbox"/> Package				<input type="checkbox"/>
<input type="checkbox"/> Transmittal				<input type="checkbox"/>
<input type="checkbox"/> Lots	AUTO	[Area][LotType]-	[Area][LotType]#####	<input type="checkbox"/>
<input type="checkbox"/> Forms				<input type="checkbox"/>
<input type="checkbox"/> Defects	AUTO	[NSPCOMPID]TEST	[NSPCOMPID]TEST###	<input type="checkbox"/>
<input type="checkbox"/> Checklist	AUTO	[FromCompID]ChecklistTypeID-	[FromCompID]ChecklistTypeID#####	<input type="checkbox"/>
<input type="checkbox"/> Submittal	AUTO	[CompanyID][Area]	[CompanyID][Area]###	<input type="checkbox"/>
<input type="checkbox"/> Submittal Deliverable				<input type="checkbox"/>
<input type="checkbox"/> Submittal Set	AUTO	[ID][ProjectNo]-	[ID][ProjectNo]###	<input type="checkbox"/>

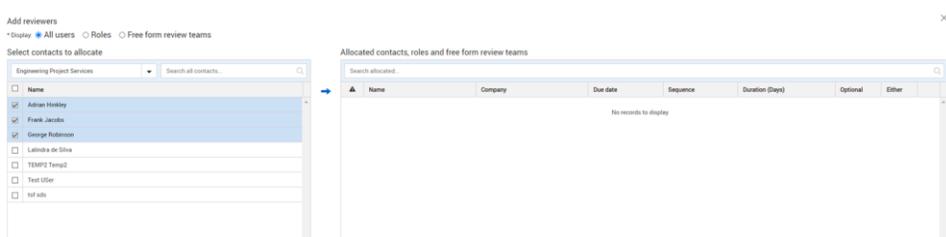
To remove the existing number scheme, click the icon, and then confirm by clicking **Delete** in the confirmation box. After the numbering scheme is deleted, the suffix restarts from 0.

Manage users in document rules in bulk

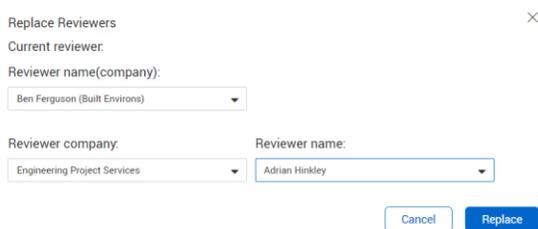
You can now select multiple teams on the Review team Rule Type page (Settings > Admin > Manage document rules > **Review team**) and then go to the Actions menu to add, remove, or replace reviewers to the review teams.



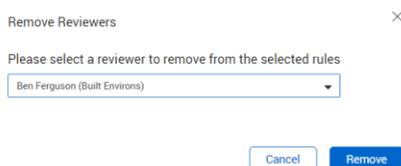
When adding reviewers, select **Users, Roles, or Free form review team** and a company to see applicable values. A list of applicable users, roles, or teams is shown, and you can then select one or more. You can also specify the sequence and the duration or whether the reviewer is optional or either. Click **Save**.



To replace reviewers, select **Replace reviewers**. The Replace Reviewers dialog box opens. Select the reviewer to be replaced, and then select the reviewer company and reviewer name of the replacement. Click **Replace**.

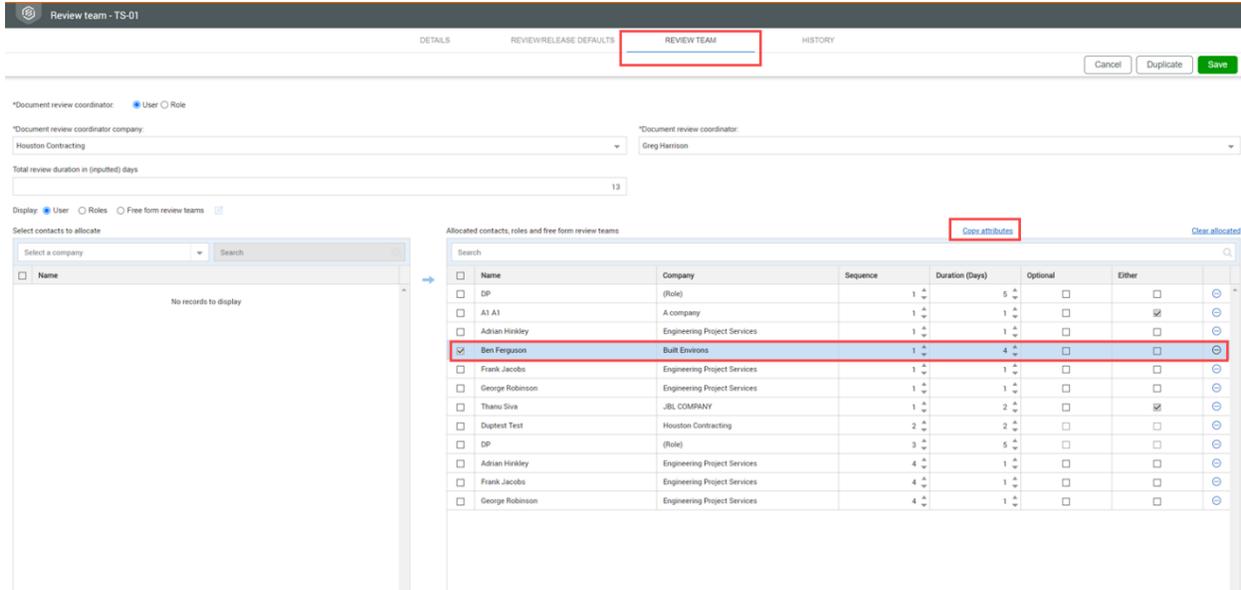


To remove reviewers, select **Remove reviewers**. The Remove Reviewers dialog box opens, and you can select the name of the reviewer to remove from the rules. Click **Remove**.

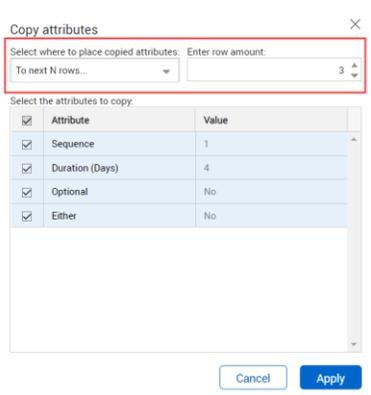


Copy attributes from a reviewer to other reviewers

After you add reviewers, you can save time defining their attributes by copying the attributes of another reviewer on the team and applying them to the new members. To copy attributes, open the review team and then go to the Review team tab. You can then select the name of the reviewer whose attributes you want to copy, and then click **Copy attributes**.



The Copy Attributes dialog box opens. You can then select where to place the copied attributes and the number of rows. Select the attributes you want to copy and then click **Apply**.



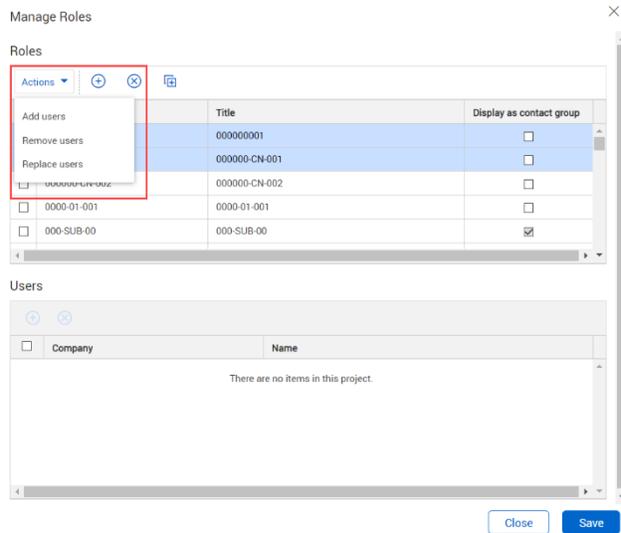
The attributes are copied from the selected reviewer.

Address book

Manage roles and free form review teams in bulk

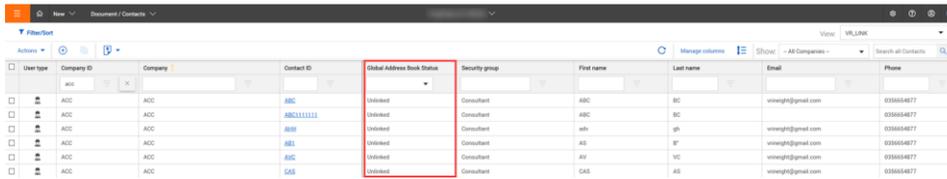
From the Actions menu in the address book, select **Roles** or **Free form review teams**. The Manage Roles dialog box open where you can select one or more roles or free form teams.

From the Actions menu in the dialog box, you can add, remove, or replace users or reviewers.

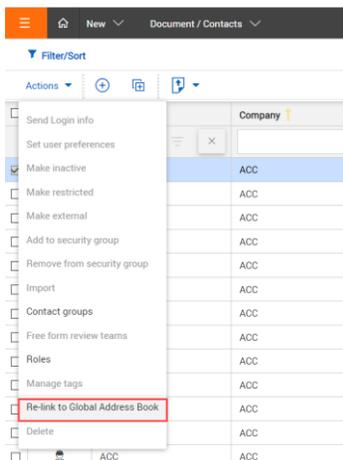


Global address book status

The Global address status column has been added to the Address book register for contacts and companies, so you can see quickly if the entry is linked to or unlinked from the global address book.



If the entry is unlinked and you want to relink it, you can select it, open the **Actions** menu, and then select **Re-link to Global Address Book**.



The Global Address Book status field has also been added to the Contact details page. The field is for information only. If you want to relink the status, you must do it from the Address book register.

Lots

Bulk upload

The Bulk items option has been added to the Add function on the Lots register. To add lots in bulk, click the **Add** icon, and then select **Bulk items**. You then choose to add either **New Lot** or **New Sub-Lot**.

The Import Lots page opens. You can enter the lots on the page, and then click **Save**.

You can also import lots in bulk from a Microsoft Excel file. To import lots, click the **Download template** icon to import the template.

Add the lots or sublots to the template file, and then click **Import template** to import it.