



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



# Contents

What's new in Document 22.6	.4
Documents	.6
Download documents from the Links tab	. 6
Group items on the Review, Release, and Manage workflow registers	. 6
Download PDF files with or without annotations via bulk download	. 7
Registers Select all option	. 8
Viewer	.8
Viewer table of contents and document navigation	. 8
Submittals	.9
Disable deliverables in submittals	. 9
Forms	.9
Include section data for form types	. 9
Disable notification when user is made inactive	. 9
Administration	10
Remove existing number scheme	10
Manage users in document rules in bulk	10
Copy attributes from a reviewer to other reviewers	11
Address book	12
Manage roles and free form review teams in bulk	12
Global address book status	13
Lots	14
Bulk upload	14



# 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. <u>Read more</u>
- 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. <u>Read more</u>
- 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. <u>Read more</u>
- Registers Select all option The option to select all entries has been added to the Document register. <u>Read more</u>
- 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. <u>Read more</u>
- Submittals
  - Disable deliverables in submittals You can now upload and track documents directly to submittals rather than in deliverables. <u>Read more</u>
  - 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. <u>Read more</u>
  - 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. <u>Read</u> <u>more</u>
- Administration
  - **Remove an existing number scheme** You can now delete an autonumbering scheme that had been previously defined for a project. <u>Read more</u>



- 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. <u>Read more</u>
- 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. <u>Read more</u>
  - 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. <u>Read more</u>
- 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. <u>Read more</u>



# Documents

# **Download documents from the Links tab**

The Download icon has been added to the Links tab for Documents. The icon was added for the Document module only.

			DETAIL LINKS C	COMMENTS	FILE VIEWER
Mail (29)	Œ	$\Theta = \overline{\uparrow}$			
		Document No.	Title	Rev	Sts
Document (33)		00000000	Testing PH - Vendor	A	test1
Transmittal (4)		000000000000000000000000000000000000000	Testing long document number	A	IFI
Form (7)		00000000-TA-1027-1131	Testing processing attachments-11/20zasd	В	IFI
		00000000-TA-1027-1132	Testing processing attachments-11/20zasd	В	IFI
Gallery (58)		0000000LTA-1027-1124	Tacting proceeding attachmente-11/907acd	C.	101

To download a set of documents, select them, and then click the **Download** icon. The Select files to download dialog box opens. You can then select the files and indicate whether to download directly or download via queue.

#### Group items on the Review, Release, and Manage workflow registers

A grouping tool has been added to the Review, Release, and Manage workflow registers. 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 Sts column to the bar, the reviews are grouped by status.

	† Sts 🗙					
		Document No. ↑	Rev	Sts	Review status	Review history
			•	-	=	
Ŧ	Sts: IFC					
		<u>A-G-FP-0005</u>	D	IFC	~	G
Ŧ	Sts: IFR					
		<u>CN-632021-001-CN-632021-</u>	SD1	IFR	~	G
		TE-0001-625-PRD-DATA-OU	A	IFR	~	G
		TE-0001-625-PRD-DATA-OU	A	IFR	~	Ŀ
		TE-0001-625-PRD-DATA-OU	В	IFR	~	G
		TE-0001-629-SHP-DWG-OU	A	IFR	~	G
		TE-0001-630-SHP-DWG-OU	В	IFR	~	G

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

To use multiple groups, you can drag multiple column headings to the grouping tool. The items are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline



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

<b>†</b> s	Sts 🗙 🕇 Di	scipline 🗙				
		Document No. ↑	Rev	Sts	Review status	Review history
			-	-		
- Sts	IFC					
-	Discipline: AR	СН				
		<u>A-G-FP-0005</u>	D	IFC		Ŀ
⇒ Sts	: IFR					
-	Discipline: 8M	ILES				
		<u>CN-632021-001-CN-632021-</u>	SD1	IFR	Ψ	G
-	Discipline: CIV	-MD				
		TE-0001-625-PRD-DATA-OU	A	IFR	<b>.</b>	G
		TE-0001-625-PRD-DATA-OU	A	IFR	<b>.</b>	G
		TE-0001-625-PRD-DATA-OU	В	IFR	~	Ŀ
		TE-0001-629-SHP-DWG-OU	A	IFR	~	Ŀ
-	Discipline: STF	łU				
		TE-0001-630-SHP-DWG-OU	В	IFR	~	Ŀ

#### 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.

	Actio	ons 💌	+ •	Trans	mit 🔻	•	ē • 🕹				<b>C</b> =	
			9	P		Docur	nent No. 🏌	Rev	Sts	Document title	Disc	ipline
								_	_			-
					s	elect fil	es to download					×
111			<b>5</b>	P		oup by						
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111		9	<b>,</b>	P								
				P		Downloa	ad pdf files with Annotat	ions				
			5	P		Select a	II files					
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-			5	P			00000000-TA-1027	-1131.B.IFI.B.01 (2).png			75 KE	
				P		D	ocument No: 000000	00-TE-1027-1130	Rev: C	Sts: IFI	1 file	
-				P			104093-RG-ARC-00	3.A.IFI.pdf			306 KE	
1				P			ocument No: 000000	00-TE-1027-1130-000	Rev B	Sts: IFI	2 files	
1				B			07.001 - Document	Workflow Review Summa	ny - by Discipline 17-05	5-2016 - Conv.pdf	150 //	
-			<b>(4)</b>	B	-		or.cor - Document	WORNOW NEVIEW Summe	ry - by biscipline 17-0.	-2010 - Copy.put	100 KE	
-			4	8		Ľ	deepangoda road.	PNG			272 KE	
-			54 (1)	69								
			14	69								v
-				6		Total ite	ems: 4 Selected iter	ms: 4 Selected file size:	801 KB			
-				R		Direc	t Download O Down	nload via Queue				
-						*Title:			*Maximum Zip	Size		
-											1 GB 🌲	
												· •
III										Cancel	Downlo	ad

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.

ł					TRAINING01-SCHED-000017	Α	IFI
ł					TRAINING01-SCHED-000018	A	IFI
					TRAINING01-SCHED-000019	A	IFI
1					TRAINING01-SCHED-000020	A	IFI
-	-				TO UNIVERSI CONTO 200001		
	Items: 537	Selected	items: 0 \	view select	ed Clear selection Select all 53	37 items (1) <sup>;</sup>	

# 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.

							DETAIL	LINKS	COMMENTS	FILE VIEWER	REVIEW STATUS	TRANSMITTAL HISTORY	HISTORY
File nam	es: PDF - (0	00)A001.A	.IFI - Floor Plans.	pdf 👻									
Viewing	ools Mar	rkup	Measure										
٢	Ø Ø	Q	<b>≪V</b> Marquee	Q Loupe	Fit Page 🗸	1 🗃 🗇	() 1	/ 6   < Pres	vious Document	Next Document			
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9						Internet of 10 (1) Internet of the second second Internet of the second second Internet of the second se							



# **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.

Ξ	Ω New ∨ Doc	ument / Submittal 🗸											Ø 🕤
	T Filter/Sort										View. All		*
	Actions • 💿 • 📑	Transmit      Oreste Set							0	Clear at filters Man	ige columns 🚦 S	earch Submittals	Q
D	Drag a columh header and drop it here to group by that column												
			<u> </u>					Issued to					
	Submittal No. 🕇	Title	Documents	Status	Rev	Created by	Date created	Company	Name	Area	Discipline	Submittal cat	igory
				•							•		
	NEW_NODELIV-01	New document		DRAFT	A	Greg Harrison	05-27-22 01:47 PM	Tyler's Company	Tyler Test	ATR	ARCH		
	SUB-ELE-0001	Electrical Shop Drawings	2 🖸	OUTSTANDING	A	Greg Harrison	05-05-22 09:43 AM	Tyler's Company	Tyler Test	L2	ELEC		
	TE-001	Test submittal	1 🕫	OUTSTANDING	A	Greg Harrison	05-05-22 08:54 AM	Tyler's Company	Tyler Test	82			
	TE-002	Testing submittal		OUTSTANDING	A	Greg Harrison	05-05-22 00.57 AM	Tyler's Company	Tyler Test	82			

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.

•	Filter/Sort				
Acti	ions 🔹  🛨 🗸		3 -		
	Form Ref	Ъ	Excel	•	All items
			Selected Forms		Selected items
i 🗆	TEST002	00	n	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.



#### Administration

FONDER	AUTO FORWARD	NOTIFICATIONS	TASK STATUS	FORM OPTIONS	INTEGRATION	
ttaching forms						~
Attach form as Pl	DF document, when	processed as docume	nt			
<ul> <li>Never attach</li> </ul>	🖲 F	Prompt to attach	C	) Always attach		
				-		
Notify when	n recipients are made	inactive in Forms who	ere I am a recipient			
				-		
				_		
				_		
				-		
				_		
				-		
				_		

# **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	1 - Project	settings								
General									Cancel Save	
Disclaimer		Module	Trigger	Key prefix		_	Display format		Show Trigger	
Contrast Database		Document	AUTO	[FromCompID]-[Discipline]		$\otimes$	[FromCompID]-[Discipline]{###}			~
Contact Details		Mail		G				C		
Partners		Package		G				2		
Miscellaneous		Transmittal		G				62		
		Lots	OTUA	[Area]-[LotTypeid]-	ø	$\otimes$	[Area]-[LotTypeld]-(#####)	ø		
Mail		Forms		G				25		
Document		Defecta	OTUA	[INSPCOMPID]TEST		$\otimes$	[INSPCOMPID]TEST(###)			
Packages		Checklist	OTUA	[FromCompId]]ChecklistTypeId]-		$\otimes$	[FromCompld][ChecklistTypeld]-(#####)			
		Submittal	AUTO	[CompanyId]-[Area]		$\otimes$	[Companyid]-[Area]{###}			
TenderDocs		Submittal Deliverable		G				6		
Forms		Submittal Set	AUTO	[ID]-[ProjectNo]-		$\otimes$	[ID]-[ProjectNo]-(###)			
Lots										
Gallery										
Defects										
Auto Numbering										

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.





Administration «	П	Actions 🔻 🕀 🖽	$\otimes$	C Rule Type: Review Team    Search document rule Q	
Configuration tables		History ar	r		
Define/Maintain configuration tables	C	Add reviewers		Review coordinator	
Manage document rules	С	Remove reviewers		Greg Harrison (Houston Contracting)	^
Define/Maintain document	С	Replace reviewers	team	TS-01 title (Role)	
worknow rules		NSK		NSK-Review Coordinator (Role)	
Project calendar Define/Maintain working days		<u>SR-01</u>		Greg Harrison (Houston Contracting)	
		<u>TS-01</u>		Greg Harrison (Houston Contracting)	
		<u>TS-02</u>		Greg Harrison (Houston Contracting)	
		<u>TS-03</u>		Greg Harrison (Houston Contracting)	
		<u>TS-04</u>		Greg Harrison (Houston Contracting)	
		TS-Test		Greg Harrison (Houston Contracting)	

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**.

Add • Dis	Ireviewers ⊳lay: ● All users ○ Roles ○ Fre	ee form	review teams										×
Sel	ect contacts to allocate				Alloc	ated contacts, roles and free for	n review teams						
	ngineering Project Services	-	Search all contacts		Sea	arch allocated							
	Name			-		Name	Company	Due date	Sequence	Duration (Days)	Optional	Either	
	Adrian Hinkley							No secondo to dise					^
	Frank Jacobs							No records to unsp	-ay				
	George Robinson												
	Lalindra de Silva												
	TEMP2 Temp2												
	Test USer												
	tsf sds												

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**.

Replace Reviewers				×
Current reviewer:				
Reviewer name(company):				
Ben Ferguson (Built Environs)	•			
Reviewer company:		Reviewer name:		
Engineering Project Services	•	Adrian Hinkley		•
			Cancel	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**.

Remove Reviewers	×
Please select a reviewer to remove from the sel	ected rules
Ben Ferguson (Built Environs)	-
Ca	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**.



#### Address book

Breview team - TS-01										
	DETAI	LS	REVIEW/RELEASE DEFAULTS	REVIEW TEAM	HISTORY					
								[	Cancel Duplicat	e Save
*Document review coordinator:										
"Document review coordinator company:				*Document review coordinator:						
Houston Contracting			Ť	Greg Harrison						Ť
Total review duration in (inputted) days										
			13							
Display:   User   Roles   Free form review teams										
Select contacts to allocate		Allocate	d contacts, roles and free form review teams				Copy attributes			Clear allocated
Select a company		Sear	th							
□ Name	L.		Name	Company		Sequence	Duration (Days)	Optional	Either	
	-		DP	(Role)		1 \$	5 ‡			Θ ^
No records to display			A1 A1	A company		1 \$	1 \$		2	Θ
			Adrian Hinkley	Engineering Project Services		1 ‡	1 🗘			Θ
			Ben Ferguson	Built Environs		1 🌲	4 🗘			Θ
			Frank Jacobs	Engineering Project Services		1 🗘	1 \$			Θ
			George Robinson	Engineering Project Services		1 \$	1 \$			Θ
			Thanu Siva	JBL COMPANY		1 ‡	2 🌲		×	Θ
			Duptest Test	Houston Contracting		2 🛔	2 🛔			Θ
			DP	(Role)		з 靠	5 🗘			Θ
			Adrian Hinkley	Engineering Project Services		4 🗘	1 \$			Θ
			Frank Jacobs	Engineering Project Services		4 ‡	1 🌲			Θ
			George Robinson	Engineering Project Services		4 👙	1 ‡			Θ

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**.

Сору	attributes	F	×
To nex	tt N rows +	Enter row amount:	3 🖕
Select t	he attributes to copy.		_
$\checkmark$	Attribute	Value	
	Sequence	1	^
	Duration (Days)	4	
	Optional	No	
	Either	No	
			*
		Cancel	alv

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.



Manage Roles						$\times$
Roles						i i
Actions 🔻 🕀	) 🛞	æ				
Add users			Title		Display as contact group	
Remove users			00000001			-
Replace users			000000-CN	001		
U 000000-CIV-00	32		000000-CN	002		
0000-01-001			0000-01-00	1		
000-SUB-00 000-SUB-00				)	M	
4						÷ •
Users						
Company				Name		
			There ar	e no items in this project.		*
4						<u>۲</u>
					Close	Save

# **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.

≣ ຄ	New 🗸 Document / Con	tech $\sim$			~				• • • •				
▼ Filter/So	t							View: VR_LINK	•				
Actions *	💿 🕒 🗗 -	😮 🐘 🗗 🕐 🔹											
User type	Company ID	Company	Contact ID	Global Address Book Status	Security group	First name	Last name	Email	Phone				
	ace = ×			•									
	ACC	ADD	ABC	Unlinked	Consultant	ABC	80	wineigM@gmail.com	0356654877				
	ACC	ADC	ABC111111	Unlinked	Consultant	ABC	BC		0356654877				
	ACC	ADD	ANH	Unlinked	Consultant	adv	gh	vrineight@gmail.com	0356654877				
	ACC	ADD	681	Unlinked	Consultant	AS	81	vrineight@gmail.com	0356654877				
	ACC	ADD	ANC .	Unlinked	Consultant	AV	VC	vrineight@gmail.com	0356654877				
0 2	ACC	ACC	CAS	Unlinked	Consultant	CAS	AS	vrineight@gmail.com	0356654877				

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**.

	≡ l͡c New ∨ Doc	ument / Contac	cts $\checkmark$
	▼ Filter/Sort		
	Actions 👻 🕒 🕀	•	
	Send Login info		Company ๅ
	Set user preferences	Ξ×	
	Make inactive		ACC
C	Make restricted		ACC
С	Make external		ACC
C	Add to security group		ACC
С	Remove from security group		ACC
C	Import		ACC
С	Contact groups		ACC
C	Free form review teams		ACC
С	Roles		ACC
C	Manage tags		ACC
d	Re-link to Global Address Book		ACC
C	Delete		ACC
h	ACC		400

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.



				DETAILS	HISTO	RY	GROUPS					
Actions 👻 🛱											Cancel	ave
Company.			Department:					. 1	Type:			
ACC	÷ 🕀	00	AAA				*		CON			
Title:			First name:					L	Last name:			
Select a title		Ŧ	ABC						BC			
Contact ID:			Active directory name:									
ABC												
Tags:												
Select a tag												
Position:			Phone:					,	Mobile:			
			0356654877									
Fax:			Email:									
0214569874			vrineight@gmail.com									
External contact												
Preferred send method:												
Email												
Address 1:												
A11												
Address 2:												
BBB123656												
City	State:					Postcode:				Country		
AAA	SSSS					fgregre				Algeria		*
Remarke												
												6
Global Address Book status:												
Unlinked												
Make contact inactive Include inactive contact in	filters											
Make contact restricted												

# 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**.

Document / Lots 🗸										
• «	▼ Filter/Sort									
🖻 🛅 🖉 🔲 -		Acti	ions ▼ (+) ▼ (⊗ [‡] ▼							
Document			Lot No Single item Lot Type							
er New UI			Bulk items   New Lot							
			VR_2:06_0004 New Sub Lot							
2			VR_2206_DULK_L							
1092020 title			VR_2206_BULK_L							
FB-001			VR_2206_BULK_L							
IUX-001			VR_BULK_SUB_22							

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.