

Document 23.4 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-DEC-2022	Initial publication

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What's new in Document 23.4

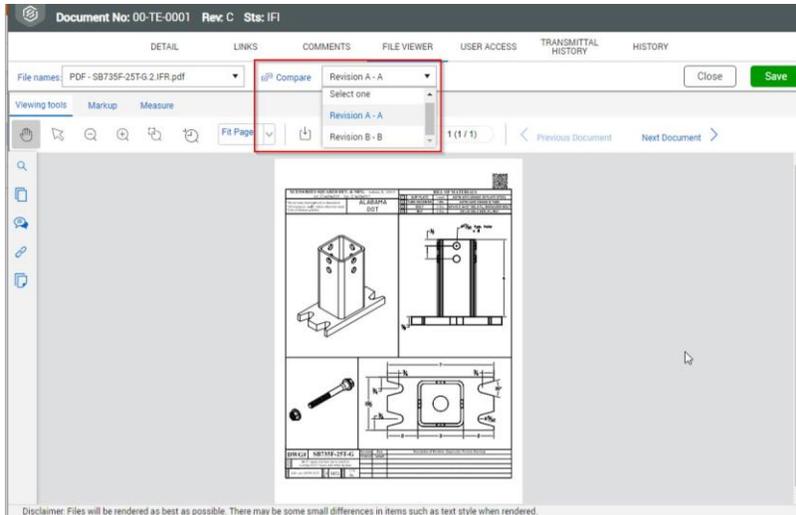
- **PDF Viewer**
 - **Compare files** – You can now compare a file in the PDF Viewer to a revision without returning to the Documents register. When you have a file open in the PDF viewer, you can now select a previous document revision for comparison. [Read more](#)
 - **Highlight annotations** – You can now click an annotation in a document in the PDF viewer, and it is highlighted in the Comments & Annotations slide-out panel, so you can quickly see the applicable comments.
- **Submittals**
 - **Create a set as a new document** – You can now create a new PDF and export it in a single action, so you do not have to create the PDF and then upload it as a document. [Read more](#)
 - **Transmit set as a combined linked document** – You can transmit a submittal set as a combined linked document. [Read more](#)
 - **Add or delete submittals in a set** – You can now add or delete submittals in a set, so you can change the submittals after the set has been created. Previously, you would have to know all the submittals in the set when you created it and could not modify it later. [Read more](#)
 - **Open the Review or Release register from a Submittal** – You can now access the Review or Release register directly from the Submittals Deliverables or Documents page. [Read more](#)
- **Documents**
 - **Update review coordinator in bulk** – You can now replace the review coordinator for multiple documents in a single action instead of replacing them individually. [Read more](#)
 - **Manually run hyperlink batching** – You can now manually link documents that might have missed reference hyperlinking when the document was uploaded. [Read more](#)
 - **Expired downloads** – The download queue now shows when an item in the queue expires. Previously, you would have to click on the files to see if they have expired. [Read more](#)
- **Lots**
 - **Update lot access in bulk** – You can now update the security for multiple lots in bulk. When managing a lot type and you add a new user to a lot type, Document now lets you update the access to all lots of that type. [Read more](#)

- **Administration**
 - **Define naming convention for downloaded files** – You can now configure the naming convention for files that are downloaded. The naming convention is applied to the documents in the zip file that is downloaded. The option to configure the naming conventions is in the project settings. [Read more](#)
 - **Configuration tables Select all** – You can now click **Select all items** at the bottom of the Configuration tables page (Settings >Admin > **Configuration tables**) to select all items in a configuration table. [Read more](#)
 - **Carry forward submittal references** – You can now specify whether Document can carry forward a submittal reference when creating new versions of a document outside of the submittal. [Read more](#)
- **Bluebeam integration**
 - **Inactive session notification** – Document now sends a notification when a Bluebeam Studio session is approaching 90 days of inactivity. The notification gives you time to take action, so the documents are not removed from the session. [Read more](#)
- **Form builder**
 - **Suppress form fields in PDFs** – When you suppress the Discipline, Area, or Location fields in a form, those fields are now suppressed in the PDFs export of the form.
- **Dashboard**
 - **Workflow and My statistics enhancements** – You can now filter and drill down on the To review line of the Workflow and My statistics tiles on the document dashboard. [Read more](#)

PDF viewer

Compare files

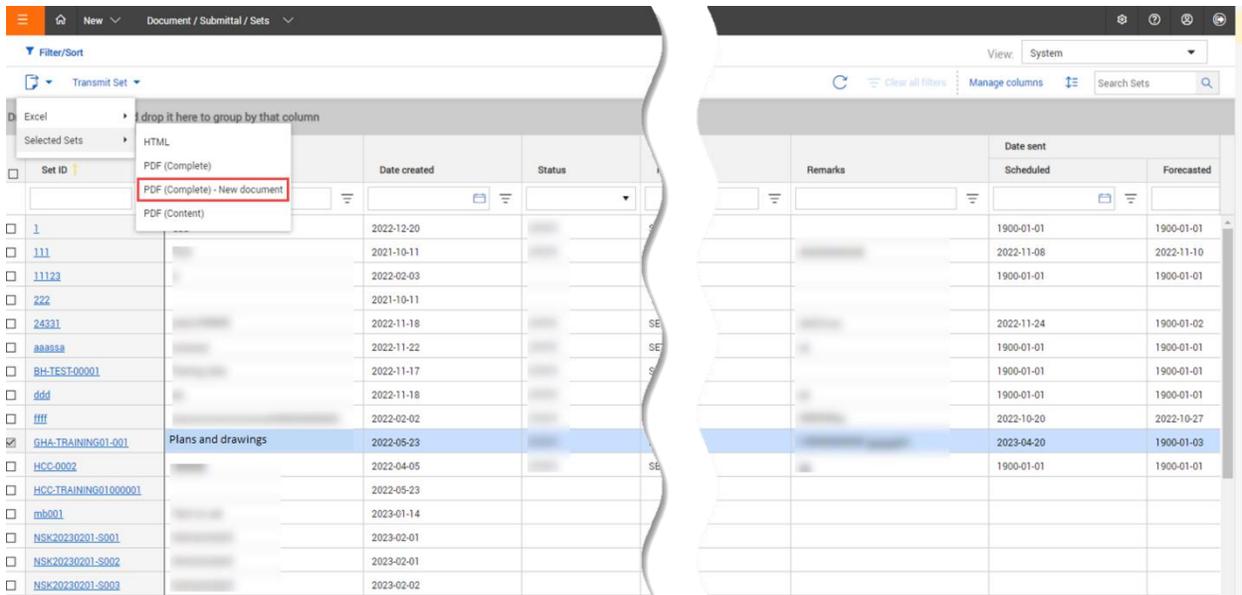
Previously, when you were viewing a file and wanted to compare it to a previous revision, you would have to go back to the register to open the compare function. Now, when you have a PDF file open in the viewer, you can select a previous revision from the Compare drop-down menu to open the compare function.



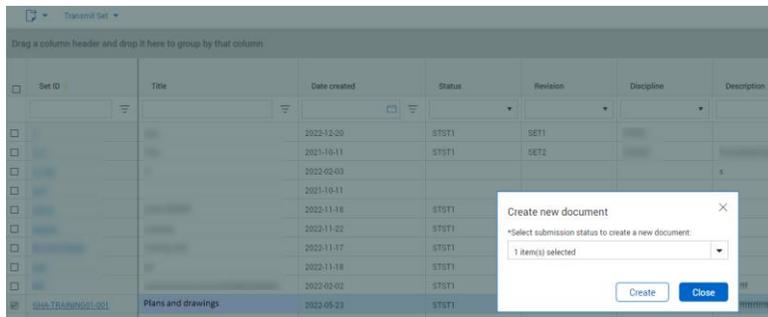
Submittals

Create a set as a new document

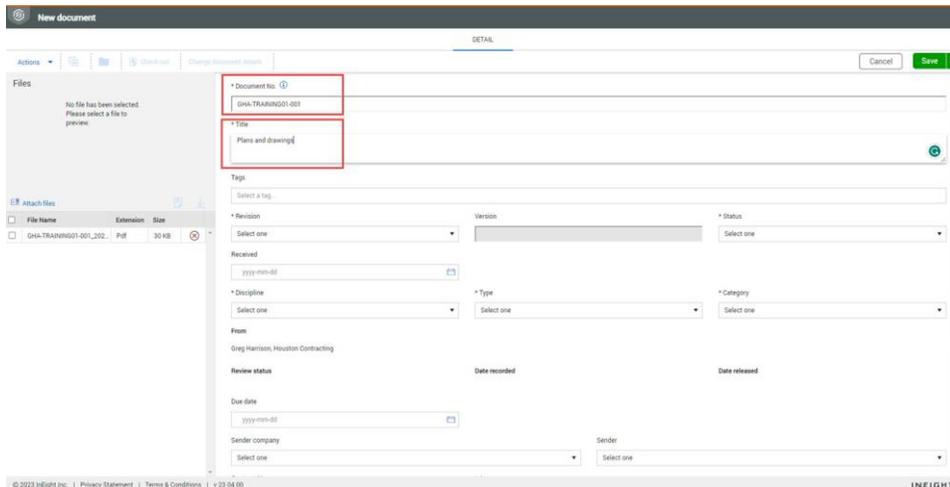
The option PDF (Complete) – New document has been added to the Export drop-down menu.



When selected, you are prompted to select which documents to include based on status, and then Document creates a PDF of the selected set.



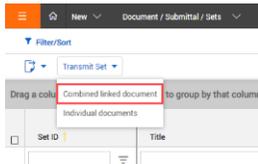
When the document is created, the New document Detail page opens. The set ID populates the Document No. field, and the title of the Set populates the Title field. You then enter the rest of the detail information, and then save the document.



After the document is saved, it is automatically linked to the set and is shown on the Links tab for the set.

Transmit set as a combined linked document

The Combined link document option has been added to the Transmit set menu.



When a combined link document already exists for the set, the Transmit Details page opens with the linked document already selected. When a combined linked document does not exist for the set, Document prompts you to create it.

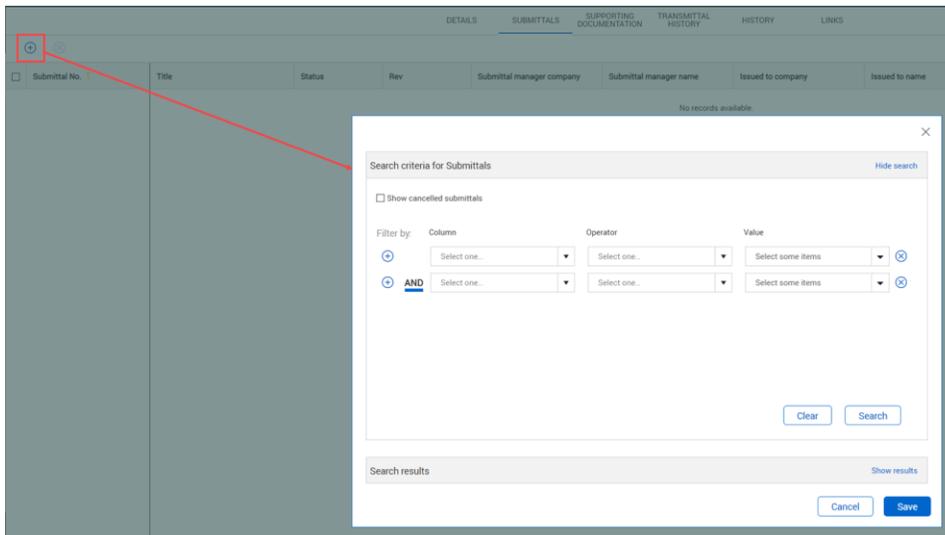


You can then follow the steps to create a linked document.

When a due date is assigned to the submittal set, Document uses that date to populate the Respond by date in the transmittal details.

Add or delete submittals in a set

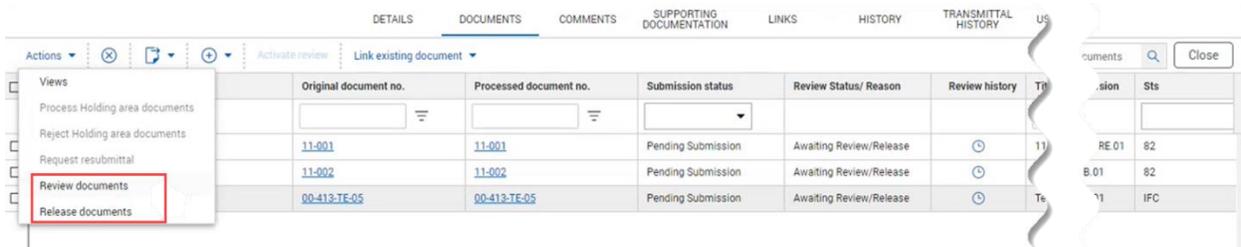
Now, when you go to the Submittals tab in the set, you can use the **Add** or **Delete** icons to add or delete submittals from a set. When you add a submittal a dialog box opens, and then you can search for a submittal and add it to the set.



Open the Review or Release register from a submittal

When a document on the submittal Documents or Deliverables page (depending on whether deliverables are disabled for the project) has a review status of *Awaiting Review/Release*, you can now go to the Review or Release register without exiting Submittals.

To go to the Review or Release register, expand the **Actions** menu, and then select **Review documents** or **Release documents**.

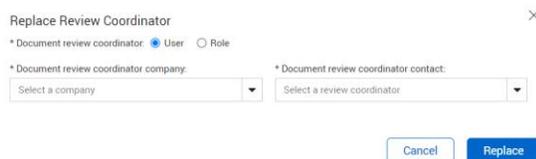


The Review or Release register opens with a filtered view that shows the documents in your review or release queue, so you do not have to search for them.

Documents

Update review coordinator in bulk

You can now select multiple documents from the documents Workflow page (Documents > **Manage Workflow**) and then select **Replace review coordinator** from the Actions menu. The Replace Review Coordinator dialog box opens.



You can then select whether a user or role is the review coordinator along with the document review coordinator contact or role.

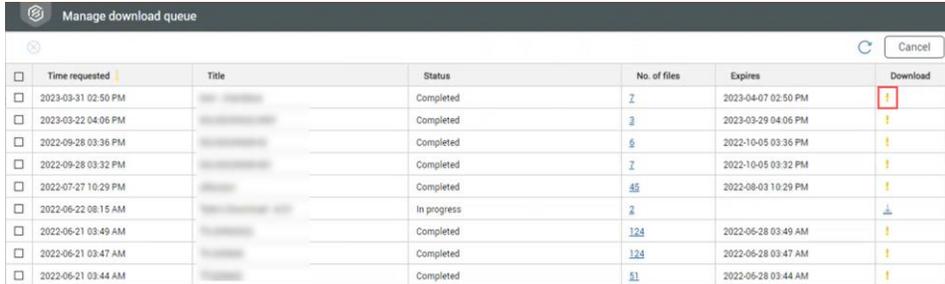
Manually run hyperlink batching

Previously, if a document had references that were not hyperlinked, the references could not be added later. Now, you can run the hyperlinking process manually to ensure all references in a document are hyperlinked.

To run the hyperlinking process, select one or more documents in the Documents register, and then select **Bulk link PDFs** from the Actions menu. A notification shows that the request has been submitted successfully. The document hyperlinking process runs in the background.

Expired downloads

Now, a yellow exclamation point shows in the Download column on the Manage download queues page to indicate the download has expired.



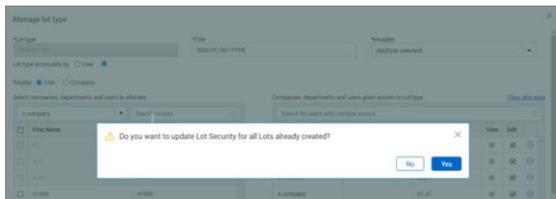
<input type="checkbox"/>	Time requested	Title	Status	No. of files	Expires	Download
<input type="checkbox"/>	2023-03-31 02:50 PM	[blurred]	Completed	7	2023-04-07 02:50 PM	
<input type="checkbox"/>	2023-03-22 04:06 PM	[blurred]	Completed	3	2023-03-29 04:06 PM	
<input type="checkbox"/>	2022-09-28 03:36 PM	[blurred]	Completed	6	2022-10-05 03:36 PM	
<input type="checkbox"/>	2022-09-28 03:32 PM	[blurred]	Completed	7	2022-10-05 03:32 PM	
<input type="checkbox"/>	2022-07-27 10:29 PM	[blurred]	Completed	45	2022-08-03 10:29 PM	
<input type="checkbox"/>	2022-06-22 08:15 AM	[blurred]	In progress	2		
<input type="checkbox"/>	2022-06-21 03:49 AM	[blurred]	Completed	124	2022-06-28 03:49 AM	
<input type="checkbox"/>	2022-06-21 03:47 AM	[blurred]	Completed	124	2022-06-28 03:47 AM	
<input type="checkbox"/>	2022-06-21 03:44 AM	[blurred]	Completed	51	2022-06-28 03:44 AM	

If a download has expired, you cannot download the documents to your workstation, and the documents must be downloaded to the queue again.

Lots

Update lot access in bulk

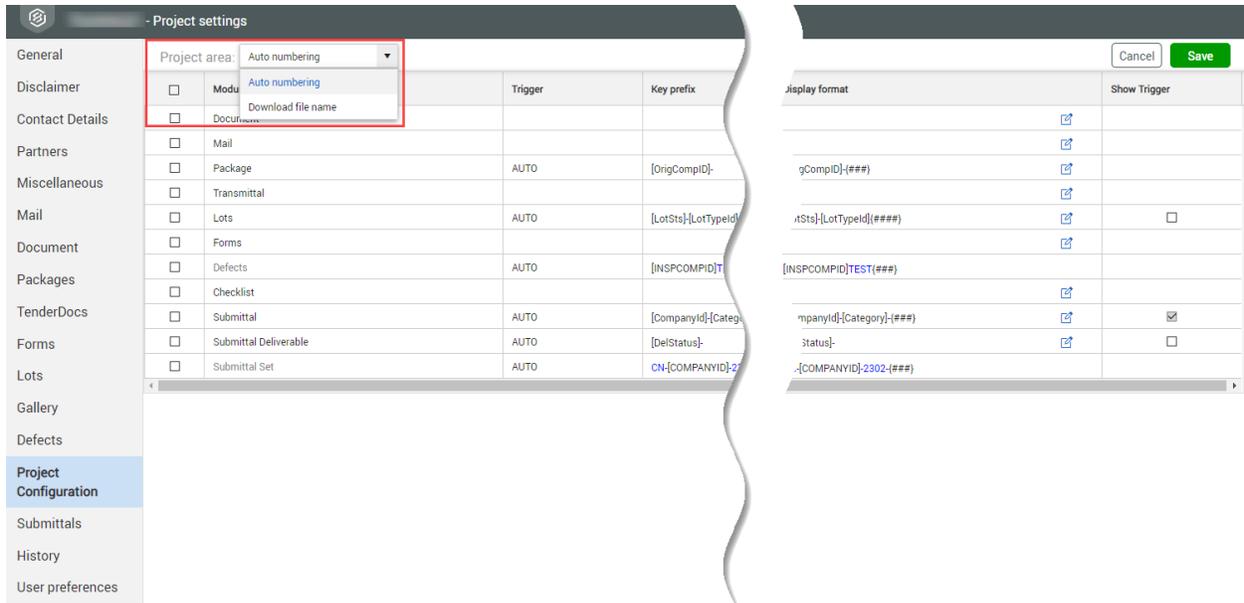
When you add a user to a lot type (Actions > **Manage lot types**) and then click **Save**, Document now asks if you want to update lot security for already created lots. If you click **Yes**, the user is given access to all existing and new lots of that type. If you click **No**, the user is given access to only new lots created of that lot type.



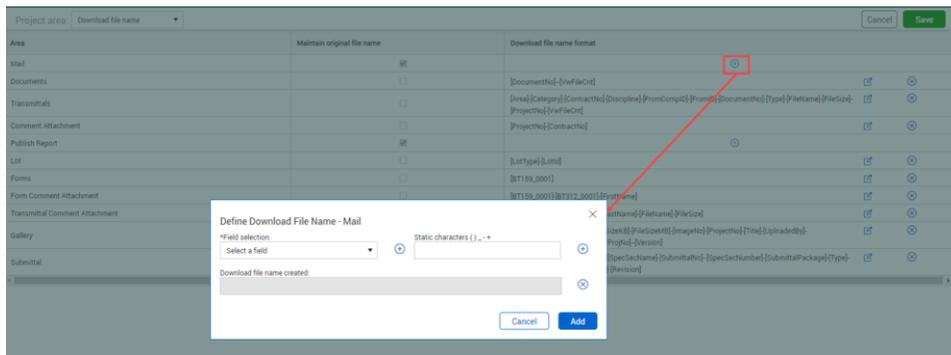
Administration

Define naming conventions for downloaded files

The Autonumbering tab in Project settings has been changed to the Project Configuration tab. The Project area drop-down menu has been added, so you can switch between autonumbering and download file name conventions.



When Download file name is selected as the project area, you can choose to maintain the original file name or to set up a file name format. To set up a file name format, click the **Add** icon. The Define Download File Name dialog box opens. You can then select the fields, such as File name or Discipline, and the static characters to use as the download file name.



The autonumbering features are in the Auto numbering project area.

Configuration tables Select all

Area	TITLE	Sub Area
@#111	!@#%&'()*	
00.0.0	00.0.0	SARE01,SARE02
000	000	SARE01
000000	0000	SARE01,SARE02
000005	000005	SARE01
001	TITLE1D	SARE01,SARE02
002	TITLE2	SARE01,SARE02
003	Title	
004	004 title	SUBAREA4
0A	0A	
0B	0B	SARE01,SARE02
	Area 3	
A311	Area 331	
A4	Area 4	
A5	Area 5	

You can use the selection check box at the top of the grid to select the first 100 items.

Carry forward submittal reference

The Document project settings has a new check box, Carry forward link to submittal when revised via document register.

Project settings

- General
- Disclaimer
- Contact Details
- Partners
- Miscellaneous
- Mail
- Document**
- Packages
- TenderDocs
- Forms
- Lots
- Gallery
- Defects
- Project Configuration
- Submittals
- History
- User preferences

General

- Allow changing details of multiple documents
- Allow deleting of transmitted documents
- Notify users about document deletion by default
- Allow changing details on superseded revisions

Attaching 'restricted document access' documents to mail/forms:

Enable Disable

Upload

Minimum document No. Length: 4

- Extract document metadata from file name
- Enable OCR PDFs on document upload

Allow uploading of superseded document revisions by:

- Administrator Other document uploaders
- Carry forward document access for superseded documents from previous revisions
- Enable upload of additional view files by review coordinator within the release wizard
- Enable upload of additional view files by originator for restrained documents
- Carry forward links when documents are revised
- Carry forward link to submittal when revised via document register.

AFTER uploading a restrained document:

- Prompt to start review
- Prompt to transmit restrained documents

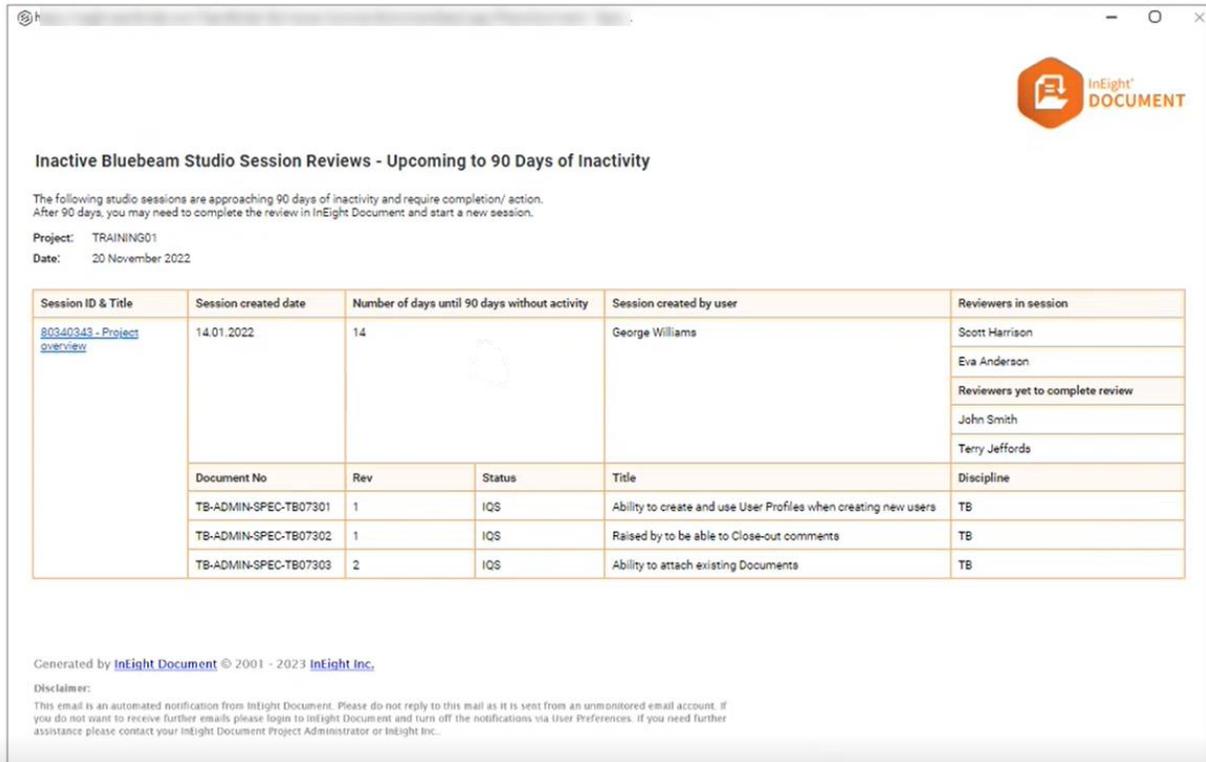
When the check box is selected, and you revise a document from the Document register, the document shows as revised in any submittal that includes the document.

Bluebeam integration

Inactive session notification

The notification includes information about the session, the creation date, how many days it has until it goes 90 days without activity, and the reviewers in the session.

Notification



InEight DOCUMENT

Inactive Bluebeam Studio Session Reviews - Upcoming to 90 Days of Inactivity

The following studio sessions are approaching 90 days of inactivity and require completion/ action. After 90 days, you may need to complete the review in InEight Document and start a new session.

Project: TRAINING01
Date: 20 November 2022

Session ID & Title	Session created date	Number of days until 90 days without activity	Session created by user	Reviewers in session
80340343 - Project overview	14.01.2022	14	George Williams	Scott Harrison Eva Anderson
				Reviewers yet to complete review
				John Smith Terry Jeffords
	Document No	Rev	Status	Title
	TB-ADMIN-SPEC-TB07301	1	IQS	Ability to create and use User Profiles when creating new users
	TB-ADMIN-SPEC-TB07302	1	IQS	Raised by to be able to Close-out comments
	TB-ADMIN-SPEC-TB07303	2	IQS	Ability to attach existing Documents
				Discipline
				TB TB TB

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Dashboard

Workflow and My statistics enhancements

You can now expand the To review line of the Workflow and My statistics tiles to see how many reviews assigned to you are optional, mandatory, or either.

Dashboard interface showing various metrics and task lists.

My Statistics (Document): Total overdue **322**

26	To Review	26 Overdue
1	Optional	1 Overdue
2	Either	2 Overdue
23	Mandatory	23 Overdue
304	To Release	296 Overdue
+999	Awaiting activation	
+999	Awaiting review where I am the Review Coordinator	
1	Uploaded since last login	

Workflow (Document): Total overdue **322**

26	To Review	26 Overdue
1	Optional	1 Overdue
2	Either	2 Overdue
23	Mandatory	23 Overdue
304	To Release	296 Overdue
595	All overdue reviews	

Transmittals (Personal): Total overdue **+999**

+999	Total sent	
577	Total received	
+999	Sent with an acknowledgement pending	
8	To review	
+999	Sent with a response outstanding	+999 Overdue

Checklist (Company): Total overdue **410**