



Document 23.4 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	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. <u>Read more</u>
 - **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. <u>Read more</u>
 - **Transmit set as a combined linked document** You can transmit a submittal set as a combined linked document. <u>Read more</u>
 - 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. <u>Read more</u>
 - 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. <u>Read more</u>
- 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. <u>Read more</u>
 - Manually run hyperlink batching You can now manually link documents that might have missed reference hyperlinking when the document was uploaded. <u>Read</u> <u>more</u>
 - 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.
 <u>Read more</u>
- 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. <u>Read more</u>



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



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.



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	NSK20230201-S003	and the second sec		2023-02-02							

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

1	🗧 🔹 Transmit Set 👻							
Drag	g a column header and drop	it here to group by that column						
	Set ID	Title	Date created	Status		Revision	Discipline	Description
					•	*		
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								8
					-			
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					1	item(s) selected		-
			2022-11-18					
							Create	
8		Plans and drawings	2022-05-23					TTO OCTOBER 1

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.

				Cancel Save
* Document No 🛈				
GHA-TRAINING01-001				
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Plans and drawings				e
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From				
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Review status	Date recorded		Date released	
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Submittals



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.

≡ ໑	New \checkmark Document / Submittal / Sets \checkmark
T Filter/	Sort
0+	Transmit Set 💌
Drag a colu	Combined linked document to group by that column
	Individual documents
Set ID	Title
	Ŧ

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.

🛆 Submittal Set	×
This submittal set does not have a combined linked d one now?	locument. Do you want to create
	No Yes

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.

			DETAI	LS SUBMITTALS D	SUPPORTING TRANSMITTAL DOCUMENTATION HISTORY	HISTORY LINKS	
•							
Submittal No.	Title	Status	Rev	Submittal manager company	Submittal manager name	Issued to company	Issued to name
					No records an	railable.	
							×
		s	earch criteria for Subm	nittals			Hide search
			Show cancelled submit	Itals			
			Filter by: Column	ine 🗸 👻	Select one	Select some items	
			AND Select o	ine▼	Select one	Select some items	
						Clear	earch
		s	earch results				Show results
						Cancel	Save



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**.

tions • 🛞 🗗 • 🕂 •	Activate review Link existing docum	eent 👻					cuments	Q Close
Views	Original document no.	Processed document no.	Submission status	Review Status/ Reason	Review history	Tit	sion	Sts
Process Holding area documents			•					
Reject Holding area documents	11-001	11-001	Pending Submission	Awaiting Review/Release	O	11)	RE.01	82
Request resubmittal	11-002	11-002	Pending Submission	Awaiting Review/Release	O	1	B.01	82
Review documents	00-413-TE-05	00-413-TE-05	Pending Submission	Awaiting Review/Release	٢	Te	11	IFC

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.

Document review coordinator company		* Document review coordinator contact:	
Select a company	-	Select a review coordinator	-

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.

	Manage download	queue				
1	8					C Cancel
	Time requested	Title	Status	No. of files	Expires	Download
	2023-03-31 02:50 PM	an contra	Completed	Z	2023-04-07 02:50 PM	1
	2023-03-22 04:06 PM	and a second sec	Completed	3	2023-03-29 04:06 PM	1
	2022-09-28 03:36 PM	discussion in the local discussion of the local discus	Completed	5	2022-10-05 03:36 PM	1
	2022-09-28 03:32 PM	and the second sec	Completed	Z	2022-10-05 03:32 PM	1
	2022-07-27 10:29 PM	(Real)	Completed	45	2022-08-03 10:29 PM	1
	2022-06-22 08:15 AM	feet frontian and	In progress	2		*
	2022-06-21 03:49 AM	the second se	Completed	124	2022-06-28 03:49 AM	4
	2022-06-21 03:47 AM	for an and the second s	Completed	124	2022-06-28 03:47 AM	4
	2022-06-21 03:44 AM	Transaction of the local division of the loc	Completed	51	2022-06-28 03:44 AM	1

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.

Manage lot type							
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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.



Document 23.4 Enhanced UI - Release Notes

۲	- Project	setting	js					
General	Project	t area:	Auto numbering 🔻					Cancel Save
Disclaimer		Modu	Auto numbering		Trigger	Key prefix	Jisplay format	Show Trigger
Contact Details		Docu	Download file name				Ľ	
Partners		Mail					۲	
Miscellaneous		Package			AUTO	[OrigCompID]-	gCompID]-{###}	
Mail		Trans	mittal		41170	handhar aid		
iviali		J Lots			AUTO	[LotSts]-[LotTypeld	رید (Lot lypeid) (####)	
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Gallery								,
Defects								
Project Configuration)		
Submittals								
History						(
User preferences						(

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.

Project area: Download file name •								Save
Area	Maintain original file name		Download file name format					
Mail	×							
Documents				[DocumentNo]-[/WFileCnt]				
Transmittals			[Area]-[Category]-[ContractNo]-[Discipline]-[FromCompID]-[From[]]-[DocumentNo]-[Type]-[FileName]-[FileSize]- [ProjectNo]-[VarFileCnt]		đ			
Comment Attachment				[ProjectNo]-[ContractNo]		C		
Publish Report	Publish Report			z				
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Forms	Forms						đ	
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Gallery	*Field selection:	*Field selection:		Static characters ()+		sizeKB}{FileSizeMB}-{ImageNo}-{ProjectNo}-{Title}-{UploadedBy}- ProjNo}{Version}	đ	
Submittal	Select a field					[SpecSecName]-[SubmittalNo]-[SpecSecNumber]-[SubmittalPackage]-[Type]- [{Revision]	ľ	
1					\otimes			•
				(Cancel Add			

The autonumbering features are in the Auto numbering project area.



Configuration tables Select all

Administration «	Actions	• 🕀 🕀 🎝		C Module: All				
20 Manage administrators	Module	All Field: Areas						
Manage administrators for the project		Area 🕇	TITLE	Sub Area				
Anage user access		<u>@#111</u>	1@#\$%^&*()					
Define/Maintain user access and		00.0.0	00.0.0	SARE01,SARE02				
security		000	000	SARE01				
Configuration tables Define/Maintain configuration		000000	0000	SARE01,SARE02				
tables		000005	000005	SARE01				
Manage document rules		001	TITLEID	SARE01,SARE02				
Define/Maintain document workflow rules		002	TITLE2	SARE01,SARE02				
Project calendar		003	Title					
Define/Maintain working days		004	004 title	SUBAREA4				
		<u>0A</u>	0A					
		08	08	SARE01,SARE02				
	and the second							
Area 3								
		<u>A311</u>	Area 331					
		<u>A4</u>	Area 4					
		A5	Area 5					
	e							
	Items: 36	4 Selected items: 0 View selected Clea	ar selection Select all 364 items ();					

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.

۲	- Project settings
General	
Disclaimer	General 🔨
Contact Details	☑ Allow changing details of multiple documents (j)
Miscellaneous	Allow deleting of transmitted documents O Notify users about document deletion by default
Mail	Allow changing details on superseded revisions Attaching 'restricted document access' documents to mail/forms:
Document	Enable Disable
Packages	Upload 🔨
TenderDocs	Minimum document No. Length :
Forms	4 🗘 🛈
Lots	Extract document metadata from file name Enable OCR PDPs on document upload
Gallery	Allow uploading of superseded document revisions by:
Defects	Administrator Other document uploaders Carry forward document access for superseded documents from previous revisions
Project Configuration	Enable upload of additional view files by review coordinator within the release wizard
Submittals	Carry forward links when documents are revised
History	Carry forward link to submittal when revised via document register. After uploading a restrained document :
User preferences	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

nactive Bluebea	m Studio Session Revi	ews - Upcor	ming to 90 Days of Ina	activity	
he following studio sessi fter 90 days, you may nev roject: TRAINING01 ate: 20 November 2	ions are approaching 90 days of in ed to complete the review in InEigl 2022	activity and requi ht Document and	re completion/ action. start a new session.		
Session ID & Title	Session created date	Number of day	s until 90 days without activity	Session created by user	Reviewers in session
80340343 - Project	14.01.2022	14		George Williams	Scott Harrison
overview					Eva Anderson
		the second			Reviewers yet to complete review
					John Smith
					Terry Jeffords
	Document No	Rev	Status	Title	Discipline
	TB-ADMIN-SPEC-TB07301	1	IQS	Ability to create and use User Profiles when creating new users	TB
	TB-ADMIN-SPEC-TB07302	1	IQS	Raised by to be able to Close-out comments	тв
	TB-ADMIN-SPEC-TB07303	2	IQS	Ability to attach existing Documents	тв
enerated by <u>InEight D</u> sclaimer: is email is an automated i	ocumenț © 2001 - 2023 InEig	h t Inc. Mease do not reply	to this mail as it is sent from an uni	monitored email account. If	

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

a ≣	New $ arsigma$ Document / Dashboard $ arsigma$			Tampi Tapi ta Sar	~	
สมี My St	atistics	Θ	88 Work	flow	Θ	≎: Tasks
Document	•	Total overdue			Total overdue	Allocated T
~ 26	To Review	25 Overdue	~ 26	To Review	26 Overdue 🐣	37
	1 Optional	1 Overdue		1 Optional	1 Overdue	0
	2 Either	2 Overdue		2 Either	2 Overdue	1
3	23 Mandatory	23 Overdue		23 Mandatory	23 Overdue	7
304	To Release	296 Overdue	304	To Release	296 Overdue	2
+999	Awaiting activation		595	All overdue reviews		
+999	Awaiting review where I am the Review Coordinator				×.	
1	Uploaded since last login					
			Jo Trans	smittals	Θ	🔲 Proje
			Personal	•	Total overdue +999	Test Test!!
			+999	Total sent		
		N	577	Total received		
	E-4	0	+999	Sent with an acknowledgement pending		
Check	dist	Θ	8	To review		
Company	•	Total overdue 410	+999	Sent with a response outstanding	+999 Overdue	