

Document 23.6 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	29-JUN-2023	Initial publication
2.0	17-JUL-2023	Updated

Contents

What’s new in Document 23.6	4
Registers	6
Pagination added to registers	6
Documents	7
Group workflow documents by tag number	7
PDF Viewer	8
Publish text box annotations to comments	8
Administration	8
Make values in configuration tables inactive in bulk	8
Forms	9
Add existing fields to new forms in Form builder	9
Minimize Attachments section of a form.....	9
Lots	10
Link to revisions.....	10
Add roles to Lots security.....	10
Submittals	10
Issued-to company link from Document register.....	10
Submittals self-perform mode	10
Mail	11
Control mandatory fields by mail type.....	11

What's new in Document 23.6

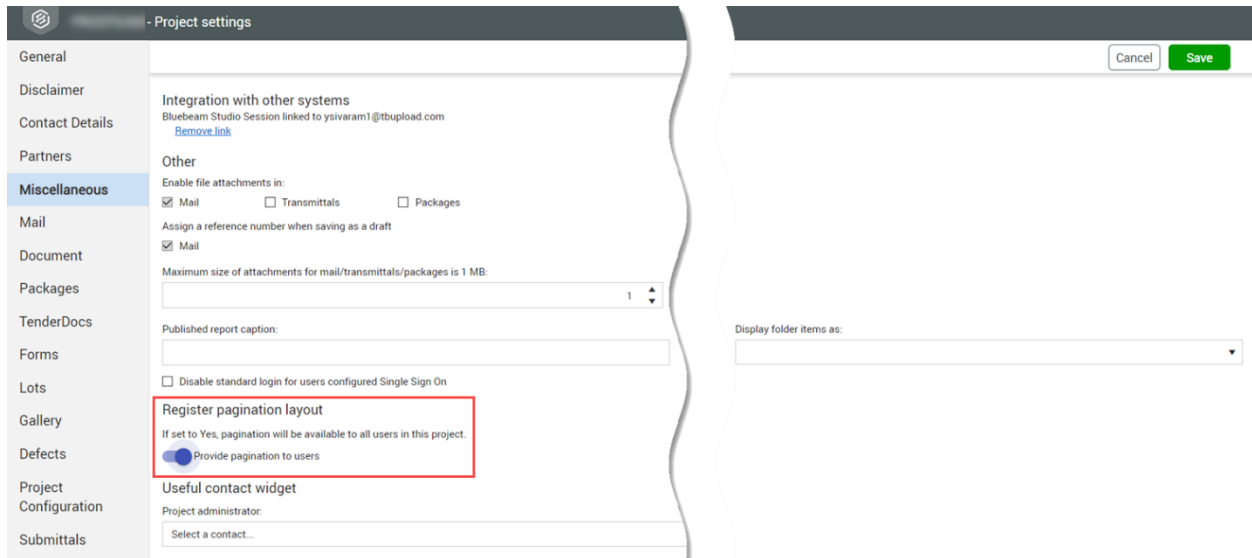
- **Registers**
 - **Pagination added to registers** – You can now change the view of a register from a detailed view, which offers infinite scrolling, to a simple view, which offers pagination. [Read more](#)
- **Documents**
 - **Group workflow documents by tag number** – Document workflow now supports tags. Tags can be generated automatically or applied manually. You can use the tag number to filter and search the Review or Release register for documents going through workflow at the same time. The generated tags can be helpful when there is no commonality in the workflow documents. [Read more](#)
- **PDF Viewer**
 - **Publish text box annotations to comments** – When you use the text box annotation in a PDF, the text is now shown in the annotation pane instead of the reference Refer to PDF file. [Read more](#)
 - **Prompt to save markups** – Document now prompts you to save after you make markups and change tabs.
- **Administration**
 - **Change of administrator prompt** – When you change the administrator company for a project, you can now transfer the ownership of the existing security groups to the new administrating company. The Manage Administrator dialog gives you the option to transfer ownership of the existing security groups to the new administrating company.
 - **Make values in configuration tables inactive in bulk** – You can now make multiple values in a configuration table inactive in a single action. Previously you had to open each value and deactivate them. [Read more](#)
- **Review and Release**
 - **Review and Release area tags** – The Tags column has been added to the Review and Release registers. You can now use tags to organize and search for documents in the Review and Release pages.
- **Contacts**
 - **New Roles tab** – The Roles tab has been added to Contacts, so you can see the roles that the contact belongs to. To access the Roles tab, click a contact to open the Details page, and then click the **Roles** tab.
- **Forms**
 - **Add existing fields to new forms in Form builder** – You can now use existing fields from other forms when you build a new form. [Read more](#)

- **Minimize attachments section of a form** – The Attachments section in a form is now collapsible, letting you see more of the form when you have many attachments. [Read more](#)
- **Autonumbering validation** – You can no longer delete a field from the form builder if it is part of an autonumbering scheme.
- **Lots**
 - **Link to revisions** – When revisions against a lot are updated, there is now an indicator showing that there are updated documents. Also, a simplified process for updating against the lot has been added. [Read more](#)
 - **Add roles to Lots security** – You can now configure lot type security for roles to give you more options when giving access to lot types. [Read more](#)
- **Submittals**
 - **Issued-to company link from Document register** – Users at the issued-to company can now link to a document that is in the Document register. [Read more](#)
 - **Submittals self-perform mode** – You can now self-perform submittal tasks on draft submittals for internal teams or on behalf of a subcontractor. Self-perform mode lets the managing company move the submittal out of draft state and close it out without having to issue the submittal. [Read more](#)
- **Mail**
 - **Control mandatory fields by mail type** – You can now control mandatory fields by mail type to provide flexibility when requiring fields. Previously, mandatory fields were mandatory for all mail types. [Read more](#)
- **Global address book**
 - **Visibility of linked projects** – A new report that shows all projects that a contact belongs to has been added to the reports. The Global Address Book Details report has now been added to the Address book. You must run the report on a project.
- **Vendor data**
 - **Add Contract Manager and Resubmittal turnaround time fields to search** – The Contract Manager and Resubmittal turnaround time fields have been added to the search filters on the Vendor Data register.
- **Gallery**
 - **Gallery folders** – Standard folders have been added to the Gallery. Folders let you store images so that they are easily accessed using the left side navigation.

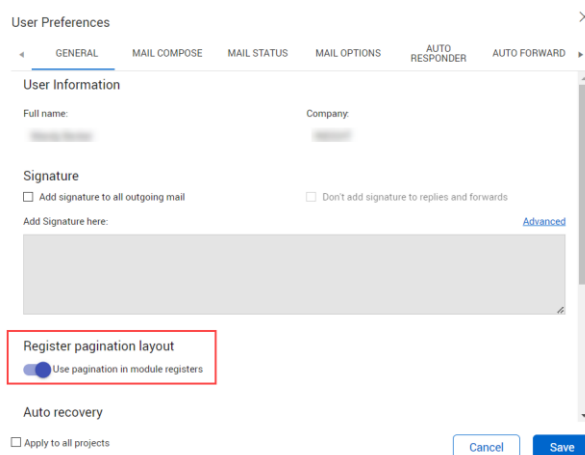
Registers

Pagination added to registers

The ability to paginate registers is enabled at the project and user preferences levels. The project administrator can set the **Provide pagination to users** toggle in the Miscellaneous project settings to **Yes** to make pagination available to all users in the project.



After pagination is enabled for a project, you can activate pagination as a user preference. Click the **Profile** icon, and then select **User preferences**. You can then set the **Use pagination in module registers** toggle to **Yes**.



A toggle to turn pagination on and turn virtual scrolling off has been added to the bottom right toolbar of registers. The page automatically opens with virtual scrolling.

Submittal No.	Title	Deliverables	Set ID	Status	Rev	Date created	Issued to company	Issued to name	Area	Discipline
INEIGHT-ELEC-00010		1	TE-ELE-00001	RESUBMITTALREQUI...	1	06-01-23 05:10 PM	Electrical Contractor...		CAR	ELEC
INEIGHT-ELEC-00009		1	Ele-000001	OUTSTANDING	1	06-01-23 04:40 PM	Electrical Contractor...		ATR	ELEC
INEIGHT-STRU-00002		1	ELE-0001-TE	RESUBMITTALREQUI...	1	04-13-23 01:11 PM	Electrical Contractor...		ATR	STRU
INEIGHT-ADMIN-00002		2		RESUBMITTALREQUI...	1	05-10-22 12:58 PM	Electrical Contractor...		MAIN	ADMIN
AUTO				DRAFT	1	05-10-22 11:11 AM	Electrical Contractor...		MAIN	ADMIN
INEIGHT-ELEC-00005		1	ELE-0001-01	RESUBMITTALREQUI...	1	05-09-22 04:10 PM	Electrical Contractor...		L2	ELEC
INEIGHT-ELEC-00004		1	TE-000123	RESUBMITTALREQUI...	1	02-15-22 07:15 AM	Electrical Contractor...		L2	ELEC

After you click the icon to change to the paginated view, you can enter the number of items shown per page in the Items per page field. You can then use the arrows on the bottom of the page to advance to the next page or go back to the previous page. The Items field shows the total number of items in the register.

Submittal No.	Title	Deliverables	Set ID	Status	Rev	Date created	Issued to company	Issued to name	Area	Discipline
INEIGHT-ELEC-00010		1	TE-ELE-00001	RESUBMITTALREQUI...	1	06-01-23 05:10 PM	Electrical Contractor...		CAR	ELEC
INEIGHT-ELEC-00009		1	Ele-000001	OUTSTANDING	1	06-01-23 04:40 PM	Electrical Contractor...		ATR	ELEC
INEIGHT-STRU-00001		1	RMK_Set_0001	RESUBMITTALREQUI...	1	06-14-22 12:16 PM	Electrical Contractor...		L0	STRU
INEIGHT-ELEC-00005	awings	1	RMK_Set_0001	RESUBMITTALREQUI...	1	05-16-22 04:08 PM	Electrical Contractor...		L2	ELEC
INEIGHT-ADMIN-00002		2		RESUBMITTALREQUI...	1	05-10-22 12:58 PM	Electrical Contractor...		MAIN	ADMIN
AUTO				DRAFT	1	05-10-22 11:11 AM	Electrical Contractor...		MAIN	ADMIN
INEIGHT-ELEC-00001		1	TE-3000	RESUBMITTALREQUI...	1	12-14-21 04:01 PM	Electrical Contractor...		CAR	ELEC
TE-0001-1214		1		RESUBMITTALREQUI...	1	12-14-21 04:01 PM	Electrical Contractor...		CAR	ELEC
TE-0001-128		1		DRAFT	1	12-08-21 01:44 PM	Electrical Contractor...		MAIN	PLU

You can click the icon in the bottom toolbar to return to virtual scrolling with no pagination.

Documents

Group workflow documents by tag number

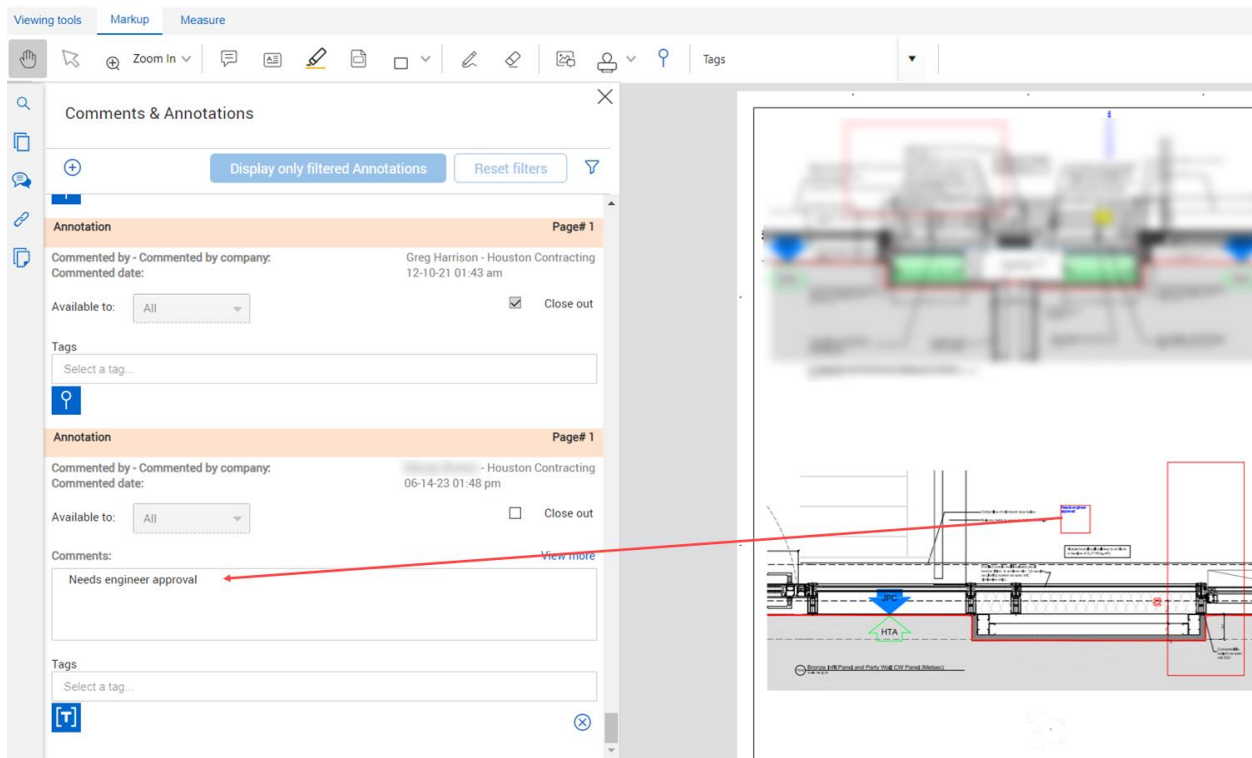
When you activate workflow for documents that have the same review team, Document now automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Document register. They also show in the new Tags column on the Review and Release registers for you to use to filter the register to quickly find all documents in the workflow. Documents in the automatic review process are also assigned an auto numbered tag.

You can also add tags manually by expanding the **Actions** menu and selecting **Manage tags**. To manually add tags in bulk, select multiple items in the Workflow register, expand the **Actions** menu and then select **Bulk tag**.

PDF Viewer

Publish text box annotations to comments

When you use the text box markup tool in the viewer to add an annotation to a document, the comment now shows in the Comments field in the Annotations section of the Comments & Annotations panel.



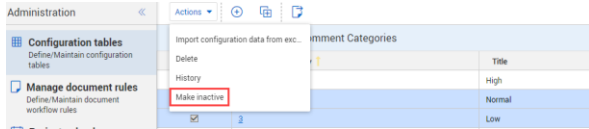
The text also shows on the Comments tab.

Actions	Site	Raised by	Raised by company	Commented by	Commented by company	Tags	Comments	Annotation type	File Name	Paragraph/Section
	BMLE		Houston Contracting		Houston Contracting		Needs engin... View issue	Textbox	(00)4001.A.IF1- Floor Plans.pdf	

Administration

Make values in configuration tables inactive in bulk

Now, you can select multiple items in a configuration table, and then go to the Actions menu and select **Make inactive**.



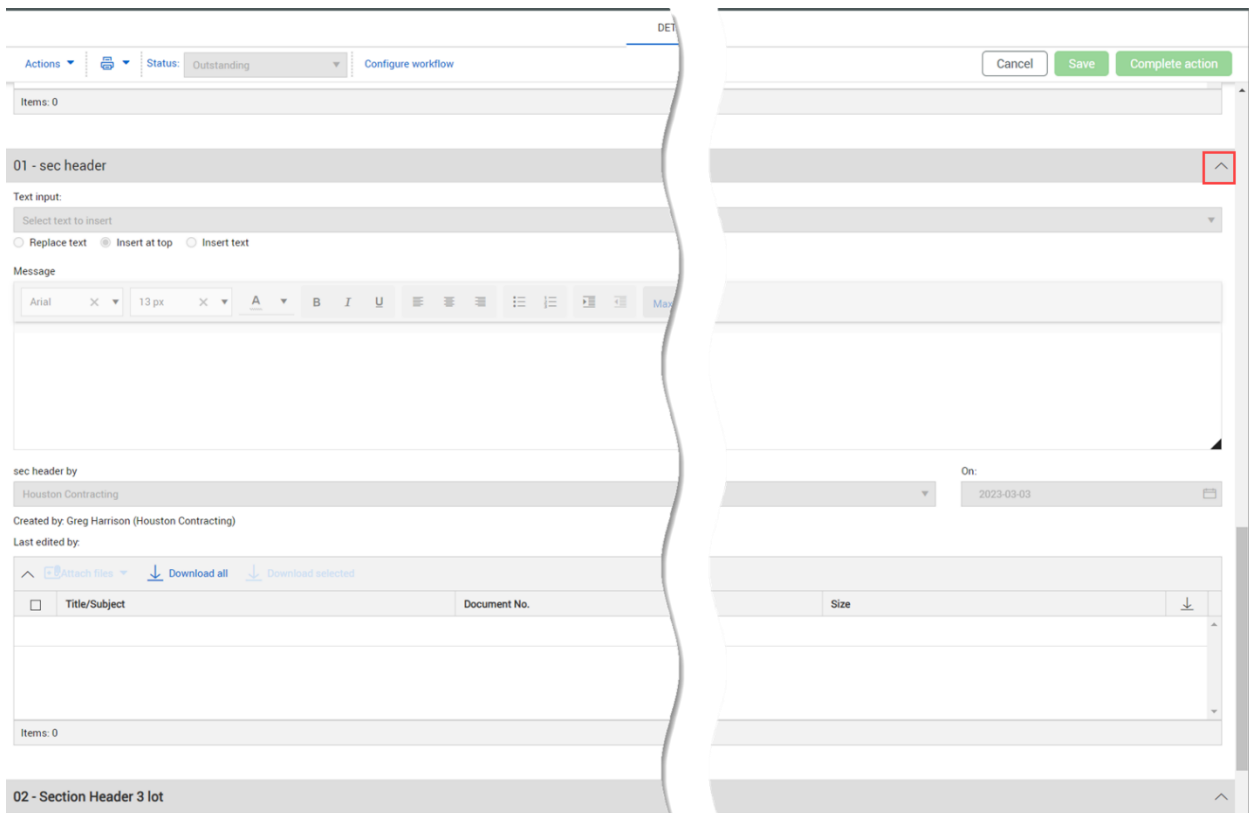
Forms

Add existing fields to new forms in Form builder

Previously when you created a form, you had to create all fields as new fields, even if they existed on other forms. Now when you create a field on a form. The New Field and Existing Field radio buttons have been added to the form builder. When you select the Existing Field button, you can then select the form type and field, instead of re-creating it.

Minimize Attachments section of a form

The form opens with the attachments section expanded. You can click the **arrow** icon in the section heading to collapse it.



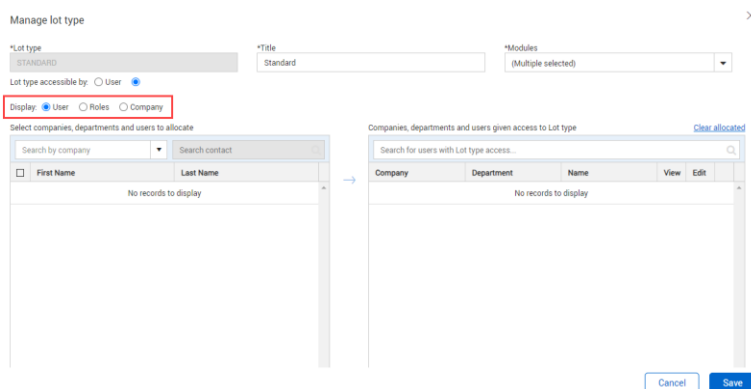
Lots

Link to revisions

When a new revision to a document is available, the Click to add revised documents icon shows for the Lot in the Lots register. Click the icon to see a list of revisions for the lot. You can then select one or more revisions to link to the lot.

Add roles to Lots security

The Roles radio button has been added to the Manage lot type dialog box.



Submittals

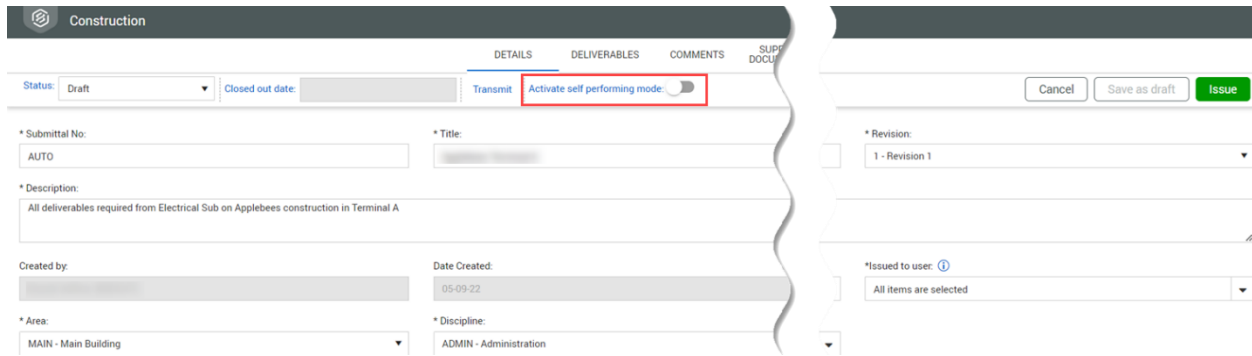
Issued-to company link from Document register

An issued-to company can use the Documents register to view documents they have been given access to. Now when a document required for the submittal is already in the Documents register, a user at the issued to company can link to the document instead of uploading it from their desktop.

The Link existing document drop-down menu has been added to the issued to company's Documents or Deliverables page.

Submittals self-perform mode

To use self-perform mode, the submittal manager must switch the **Activate self-performing mode** toggle in a draft submittal to *On*. A confirmation box asks to confirm that submittal managers can move the submittal out of draft status without issuing it.



You can then change the status of the submittal to a status other than *Draft* and save it without having to issue it.

Mail

Control mandatory fields by mail type

Now you can specify the mail types that require a field. To specify if a field is mandatory, expand the **Actions** menu on the Mail Inbox register, and then select Admin > **Configure mail workflow**. The Mandatory field column has been added to the Configure Mail Workflow dialog box. You can click the edit option for a mail type, and then select the fields that are mandatory.

