

Document 23.8 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-AUG-2023	Initial publication

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What's new in Document 23.8

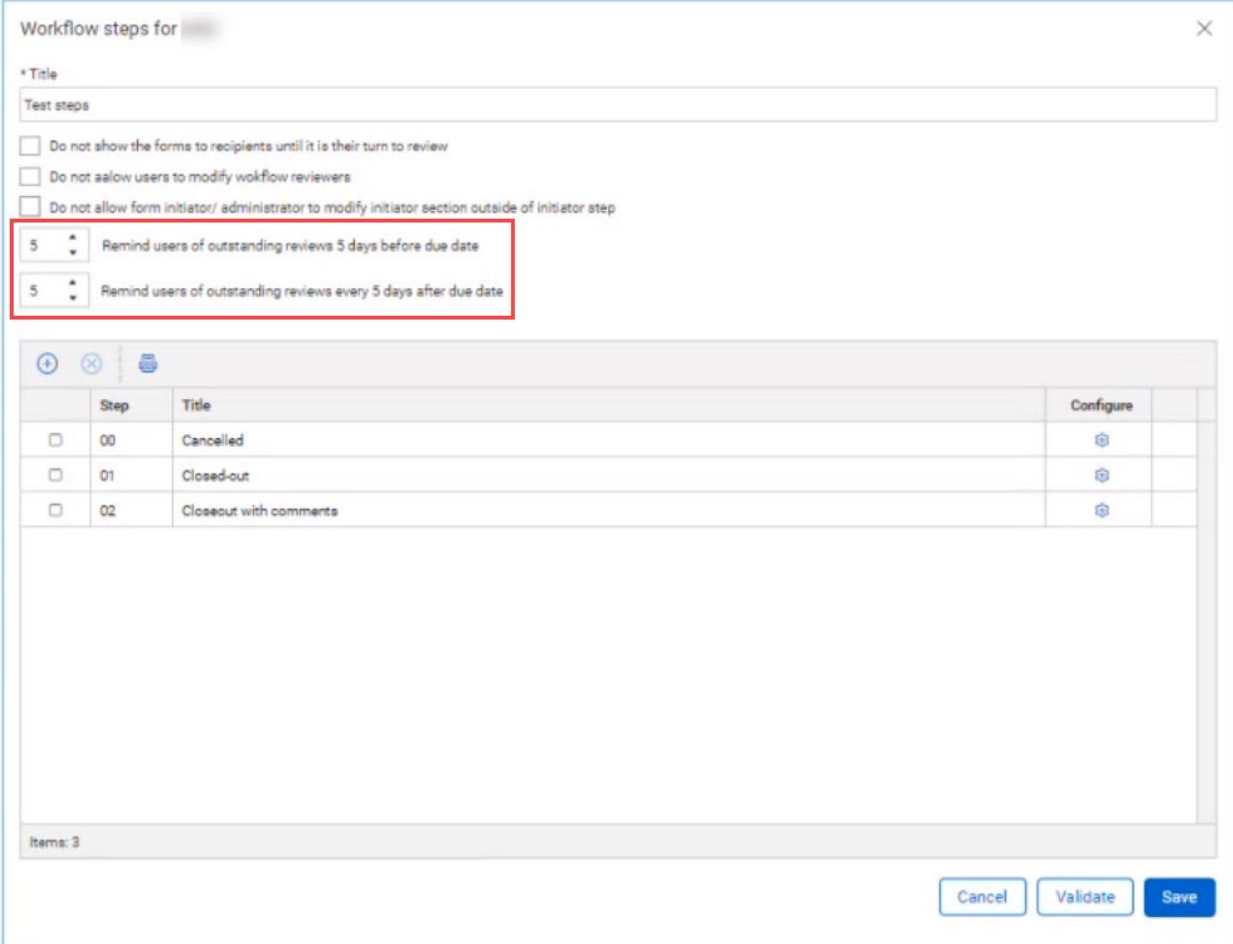
- **Forms**
 - **Notifications improvements** – You can now manage the timing and frequency of notifications of forms by form type, so you can remind reviewers of upcoming or missed deadlines at times that are appropriate for the workflow. [Read more](#)
- **Submittals**
 - **Indicators for newly submitted documents** – An indicator now shows for newly submitted documents in the Submittals register and Deliverables tab, so you can quickly see documents submitted by the issued to company that have not yet been reviewed. The indicator is also shown for individual documents in the Documents subtab, so that when there are multiple documents in a deliverable or submittal, you can see the ones that need to be reviewed. [Read more](#)
- **Documents**
 - **Improvements to download with annotations** – Document's download process has been improved to remove the FDF file. Annotations are now included in the downloaded PDF if selected.
- **Lots**
 - **Use roles in status distribution** – You can now notify a predetermined set of people of lot status based on roles. The addition of Status Distribution Roles to select users adds flexibility when you configure lot status distribution. The Roles Radio button has been added to the Status distribution dialog box used when managing lot types.
- **Address book**
 - **Filter by active directory name** – You can now filter address book contacts by Active directory name, so you can quickly find contacts.
- **Transmittals**
 - **Canceled transmittal watermark** – The watermark for a canceled transmittal now shows in the background across the entire page instead of just at the top to make it more visible.
 - **Processing Indicator** – An indicator that shows when large processes are taking place has been added to the Transmittals register. The processing icon is displayed when the item has been queued in the background. A check mark icon also shows when the process has been completed successfully. An exclamation point shows when the process was unsuccessful.
- **Reports**
 - **Disable scheduled reports** – Administrators can now disable scheduled reports when the original user who scheduled the report is no longer with the company. [Read more](#)

- **Hyperlinked customized reports** – The reference number hyperlink is now retained when you customize a standard report, so you can quickly open the report document.
- **Cancellation information in Transmittal reports** – The Cancelled Date, Cancelled by User, and Cancelled reason fields to have been added to Transmittal report, so you can search or filter based on cancellation information.
- Tag support – The Tag field has been added to workflow reports, so you can filter on the Tag field.
- Mail review reports - You can now filter Mail review reports for in progress or completed reviews.
- **Mail**
 - **Processing Indicator** – An indicator that shows when large processes are taking place has been added to the Sent mail register. The processing icon is displayed when the item has been queued in the background. A check mark icon also shows when the process has been completed successfully. An exclamation point shows when the process was unsuccessful.
- **Gallery**
 - **Smart folders** – Smart folders have been added to the Gallery, so you can automatically file gallery images into folders based upon set filter criteria.
- **Getting started**
 - **Enforce two-factor authentication at the company and project levels** – You can now configure two-factor authentication as a project or company setting instead of having individuals opt in or having InEight customize your environment. [Read more](#)
- **Customization support**
 - **Comment interfaces** – You can now control the fields that are present or required at either a comment or comment response level, so you can present different fields as needed. The control of mandatory fields for comments and comment responses is now split in the configuration tables. Contact InEight customer support at support@ineight.com for information about configuring different fields for each type.
- **Global search**
 - **Advanced Search Functions** – You can now use advanced search functions in addition to text search of the global search function. The advanced search function lets you enter part of the search string and an asterisk to match multiple characters, so you can save keystrokes and search for similar items.

Forms

Notifications improvements

The Remind users of outstanding reviews n days before due date and Remind users of outstanding reviews n days after due date fields have been added to the workflow forms.



Workflow steps for [redacted]

* Title
Test steps

Do not show the forms to recipients until it is their turn to review

Do not allow users to modify workflow reviewers

Do not allow form initiator/ administrator to modify initiator section outside of initiator step

5 Remind users of outstanding reviews 5 days before due date

5 Remind users of outstanding reviews every 5 days after due date

Step	Title	Configure
<input type="checkbox"/> 00	Cancelled	
<input type="checkbox"/> 01	Closed-out	
<input type="checkbox"/> 02	Closeout with comments	

Items: 3

Cancel Validate Save

Submittals

Indicators for newly submitted documents

After you have reviewed the document, you can click the indicator and then select **Remove indicator** to delete it.

	Submittal No.	Title	Deliverables	Status	Rev	Created by	Date created	Issued to			Discip
								Company	Name	Area	
<input type="checkbox"/>	20002-1	Submittal title A	2	SUBMISSION CO.		Fred Jacobs		Houston Contracting	Greg Harrison		
<input type="checkbox"/>	20002-2	Fire suppression		CLOSED OUT		Fred Jacobs		Houston Contracting	Greg Harrison		
<input type="checkbox"/>		Pipes	3	CLOSED OUT		Fred Jacobs		Houston Contracting	Greg Harrison		
<input type="checkbox"/>		Tools for pipes	2	SUBMISSION CO.		Fred Jacobs		Houston Contracting	Greg Harrison		

Documents

Reports

Disable scheduled reports

The Enable/Disable scheduled reports option has been added to Administration > **Manage user Access**, Security Access type for the Reports module. When the Allow check box is selected, the administrator can choose whether the access is for reports created by themselves or by the company.

Security gr...	Title	Description	Allow	Available values
<input checked="" type="checkbox"/>	CLIENT	Client	<input checked="" type="checkbox"/>	Reports scheduled by me
				Reports scheduled by me
				Reports scheduled by my company

The Enable and Disable buttons have been added to the Scheduled tab of the Standard reports. These buttons are shown only when the user has been given the applicable security access.

Report No.	Title	Created Date	Created by	Start Date
<input checked="" type="checkbox"/> 02.015	Administration Notifications History - by Notificati...	15-08-23 01:28 PM	undefined	16-08-23 03:28 PM

Getting started

Enforce two-factor authentication at the company and project levels

You can configure two-factor authorization for a project on the Miscellaneous settings page. Select the **Enforce two-factor authentication for all project users** check box.

To set two-factor authorization for a company, go to Address book > **Companies**, select your company, and then go to the Options tab. Select the **Enforce two-factor authentication for all company users** check box.