Document 24.11 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	26-NOV-2024	Initial Release
2.0	13-DEC-2024	Updated to add home page enhancement and remove a future Forms enhancement

Contents

What's new in Document 24.11

Web Release Notes

- **Documents**
    - **New bulk upload tools** – You can now copy and paste information or drag values in the Bulk upload dialog box to quickly populate metadata fields. These features work like the drag and copy and paste functions in a Microsoft Excel spreadsheet.
    - **Review type activation**– You can now select the type of review at review initiation. This is helpful with Bluebeam or Microsoft Office reviews, so you do not miss activating the correct integration. Read more
    - **Associate a review ID and title to a document workflow** – You can now assign a review ID and title to the document workflow to use for filtering or grouping documents in the Review register. Read more
    - **Activate Review dialog box custom workflow expansion** – When you activate a custom review workflow from the Activate Review dialog box, the dialog box now expands to show the workflow options. Previously, a separate window opened for these options. Read more
    - **Reactivate a completed reviewer** – When a reviewer has completed their review but then needs to go back to make additions or corrections, a review coordinator can now reactivate the reviewer. The review must still be in the same workflow step to reactivate the reviewer. Read more
    - **Reply to markups** – You can now reply to comments made in annotations in the PDF Viewer. The Add response icon now shows for markups in the Comments column of the document's Comments tab as it does for regular comments. You can click the icon to respond to the comment in the annotation.
- **Administration**
    - **Project visibility in folders** – You can now specify whether to allow other companies to have the same view of the folder content as the company that created the folder. Access is limited to the items that the company can already access. Read more
    - **Inactivate contacts assigned to key processes** – To assist the rapid off-boarding that is sometimes required on projects, you can now force the inactivation of a contact. This user remains in place on key processes and must be replaced or removed to ensure that these processes can be completed. Read more
    - **Contact group history** – The Edit contact group dialog box now includes a History tab, so you can see changes made to a contact group. The history includes when the contact group was added or deleted and edits to the group. Only events after the date of upgrade are shown in the History tab. Read more

- **Forms**
  - **Select sections and attachments for export** – When you export a form, you can now select the sections and attachments to be included in the export file. The ability to select what is included in the export is helpful when you do not want the reader of the export to see certain sections or attachments. For example, if you do not want a client to see an internal section, you could clear the check box for that section. Read more
- **Checklists**
  - **Manage roles in Checklist types** – Configuration of roles within the Checklist types configuration can now be done to align with the Checklist configuration provided within an opened checklist.
- **Lots**
  - **Provide access to lot items** – Companies can now see items that have been filed in the Lot, provided that that company has access to the item. This access gives you a unified view of the Lot contents.
- **Reports**
  - **Report for submittals with placeholders** – A new report (90.015) shows placeholders in submittals.
  - **Document Register reports Annotation type filter** – Annotation Type has been added as a filter condition for reports to align with viewer functionality.
  - **Last modified date on Forms reports** – The last modified date has been added to Forms reports to align with Forms registers.
- **Document Home page**
  - **Document Home page style update** – The Document Home page styling has been updated to align with InEight's refreshed branding. Read more

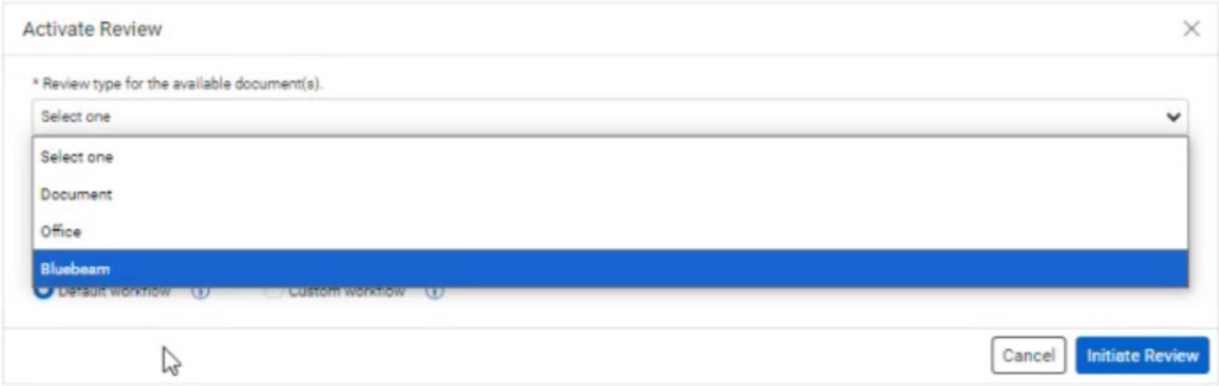
Mobile Release Notes

- **Viewer**
  - **Print from Viewer** – The print icon has been added to the Viewer toolbar so you can now print drawings and documents from the mobile Viewer.
- **Checklists**
  - **Confirm Yes, No, and N/A options in checklist** – When you select the Yes, No, or N/A options in a checklist, the confirmation button now shows in the checklist. Previously, a separate dialog box opened for confirmation.

Documents

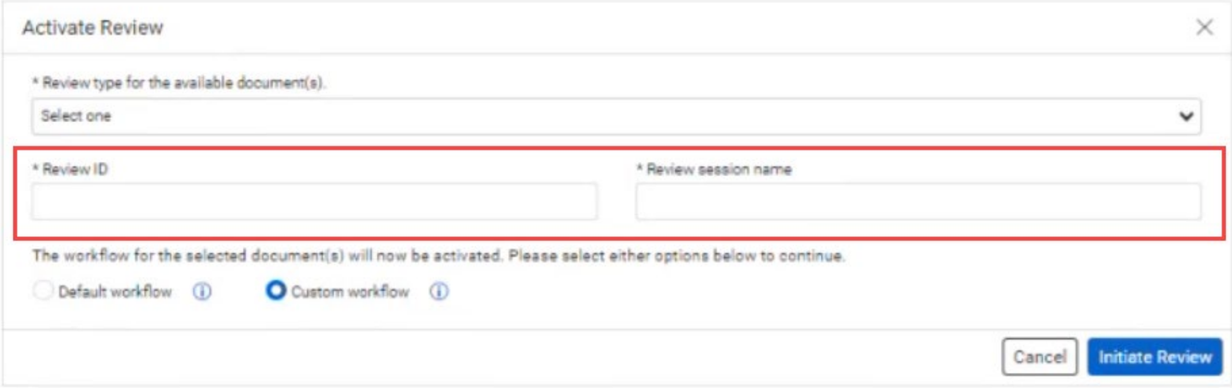
Review type activation

The Activate Review dialog box has been updated to include a list of the review types. If you have integrated with Bluebeam or Office, you can select the review type. If you have not integrated external reviews, the field defaults to Document.



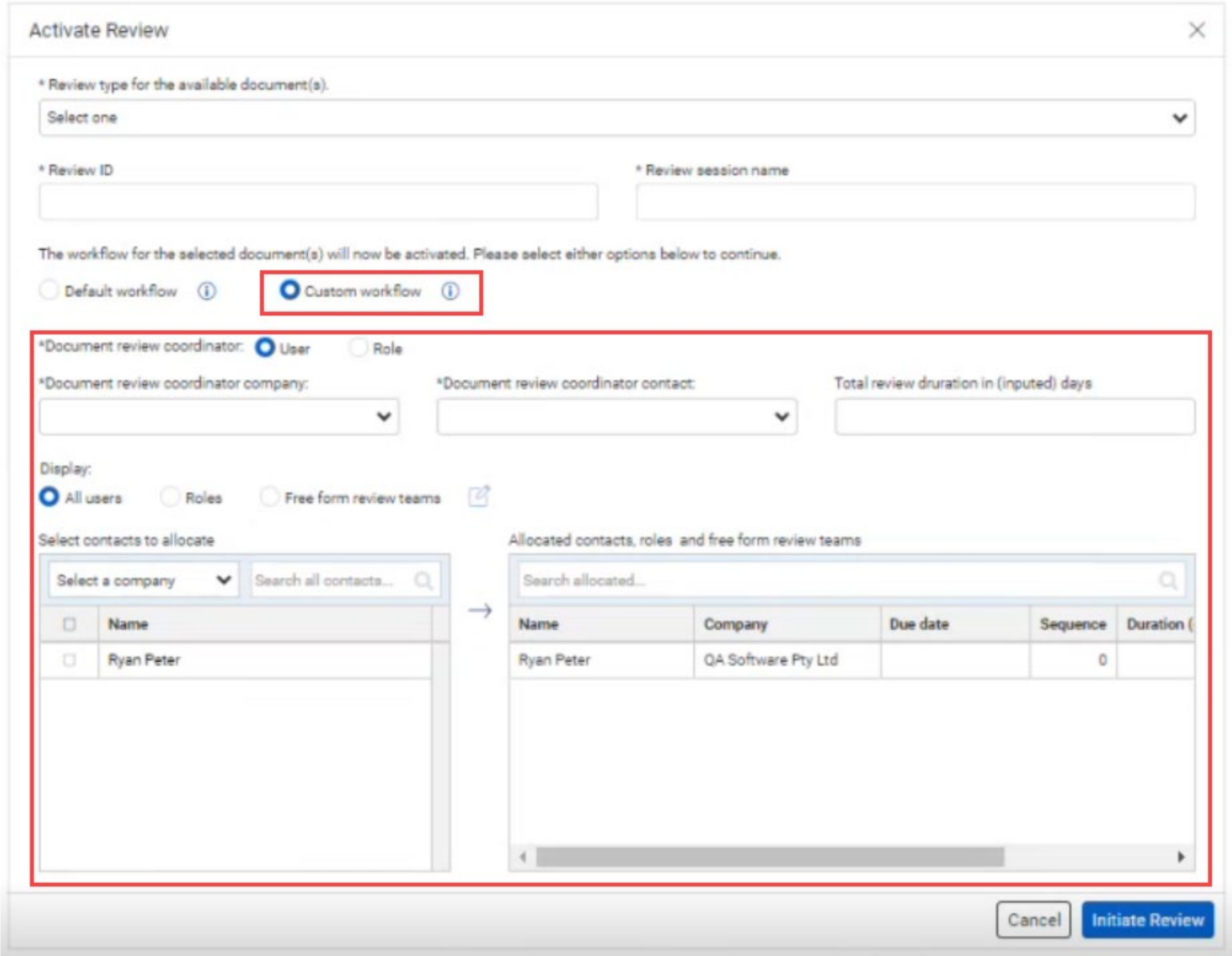
Associate a review ID to a document workflow

The Review ID and Review session name fields have been added to the Activate Review dialog box.



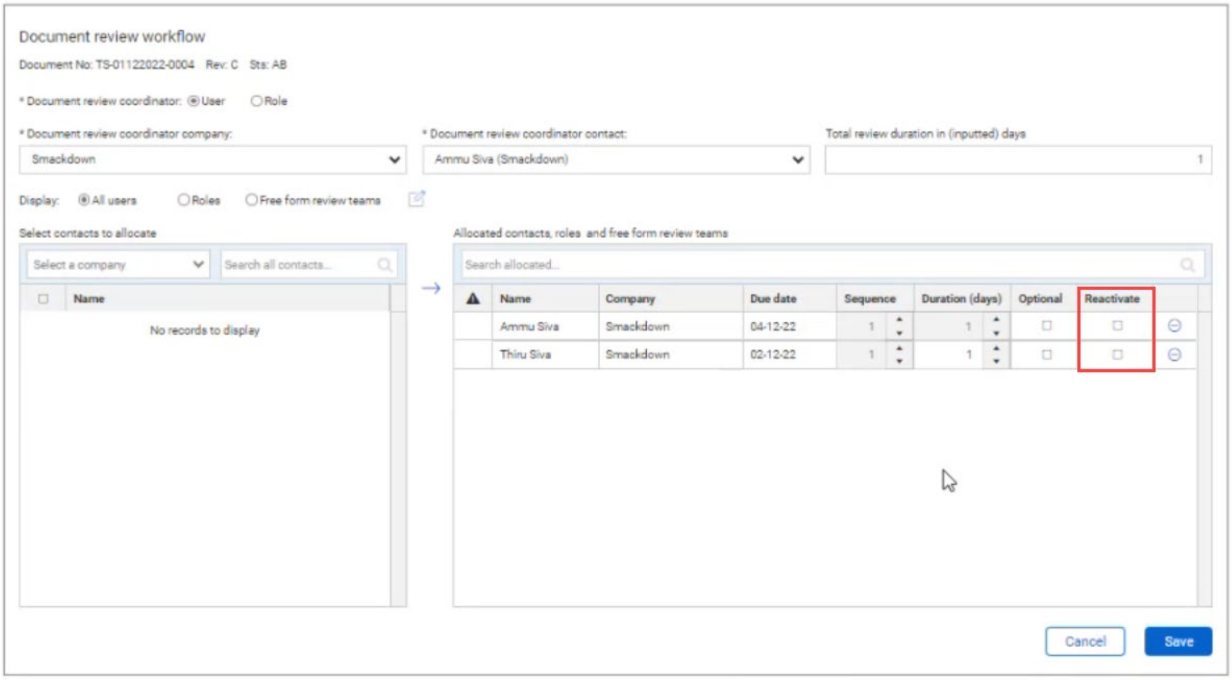
Columns have also been added to the Review register for filtering and grouping.

Activate Review dialog box custom workflow expansion



Reactivate a completed reviewer

The Reactivate check box has been added to the Allocated contacts section of the Document review workflow dialog box. To reactivate a reviewer, select the check box in the row for the reviewer.



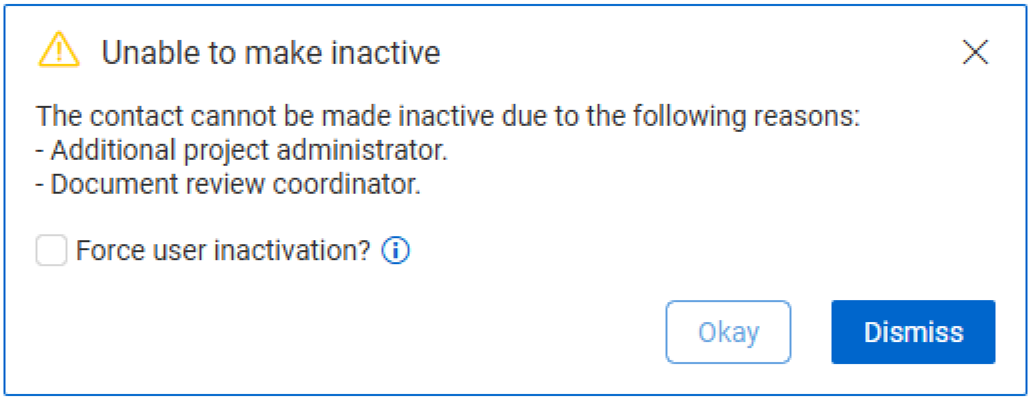
Administration

Project visibility in folders

Now, when the setting Allow project folder's content to be seen across companies (Project settings > Miscellaneous > **Other**) is selected, people working on the project can view the content in the folders created at the project level, regardless of whether they work for the company that created it.

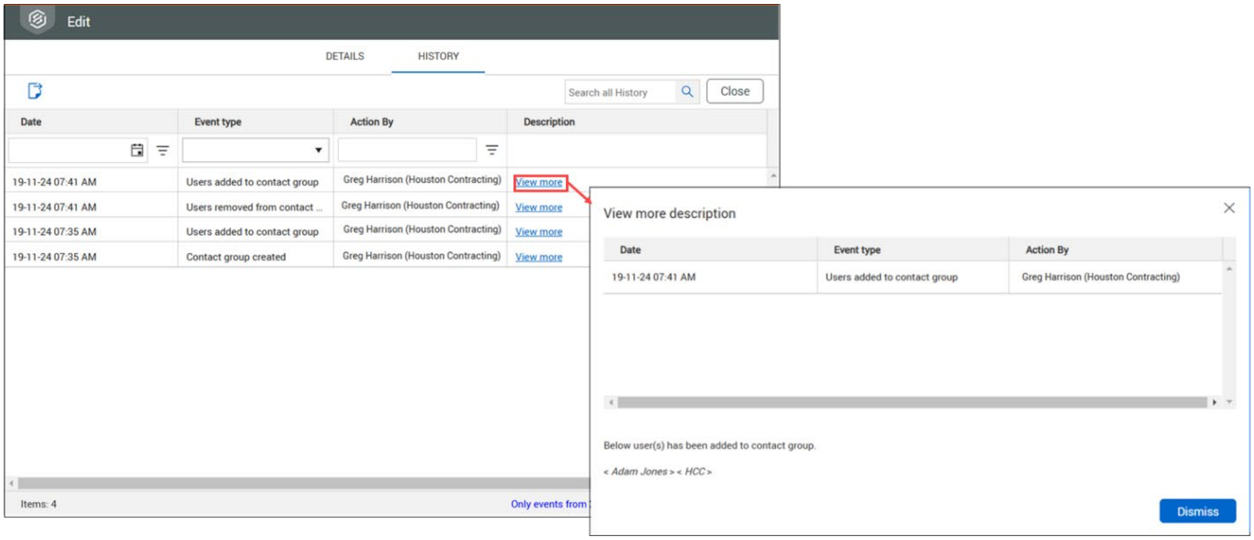
Inactivate contacts assigned to key processes

The Force user inactivation check box has been added to the dialog box shown when you try to make a contact inactive (Address book > Contacts >Actions > **Make inactive**) but cannot because the contact is a part of a key process, such as a project administrator or review coordinator. If you select the check box, the contact remains in the processes, but they must be replaced to be able to complete the processes.



Contact group history

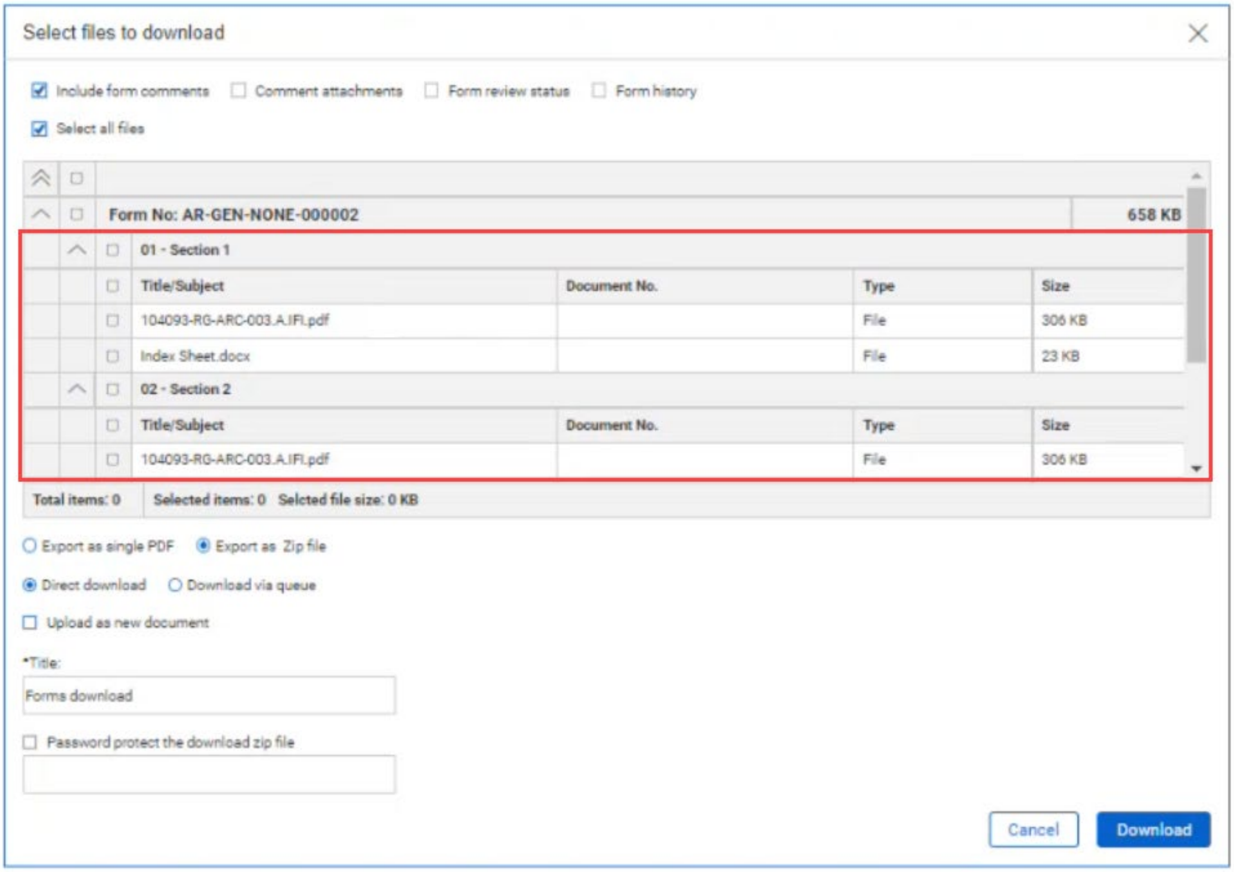
The History tab shows the date, event type, the name of the person who made the change, and a link to additional details.



Forms

Select sections and attachments for export

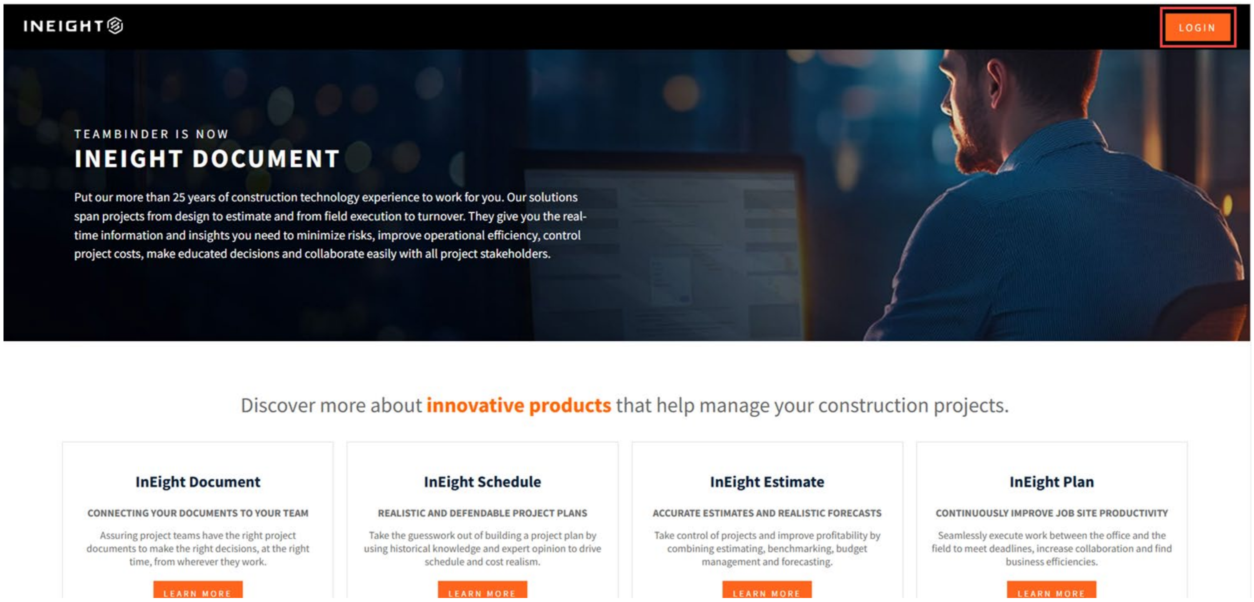
The Select files to download dialog box that shows when you export a form has been updated to show all sections and attachments. You can select all sections or attachments, or you can select only the items that you want to include in the export.



Document Home page

Document Home page style update

Click the **Login** button in the upper right corner of the home page to go to the Login page where you enter your Document credentials.


INEIGHT
LOGIN
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Put our more than 25 years of construction technology experience to work for you. Our solutions span projects from design to estimate and from field execution to turnover. They give you the real-time information and insights you need to minimize risks, improve operational efficiency, control project costs, make educated decisions and collaborate easily with all project stakeholders.
Discover more about innovative products that help manage your construction projects.
InEight Document
CONNECTING YOUR DOCUMENTS TO YOUR TEAM
Assuring project teams have the right project documents to make the right decisions, at the right time, from wherever they work.
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InEight Schedule
REALISTIC AND DEFENDABLE PROJECT PLANS
Take the guesswork out of building a project plan by using historical knowledge and expert opinion to drive schedule and cost realism.
LEARN MORE
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Take control of projects and improve profitability by combining estimating, benchmarking, budget management and forecasting.
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Seamlessly execute work between the office and the field to meet deadlines, increase collaboration and find business efficiencies.
LEARN MORE