INEIGHT

Document 24.3 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	18-MAR-2024	Initial Release
2.0	25-MAR-2024	Adds mobile enhancements

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What's new in Document 24.3

Web Release Notes

- **Documents**
    - **eSignature integration with DocuSign** – You can now send PDF or Microsoft Word files directly to DocuSign for electronic signatures. Your company must have a DocuSign account to use this feature. Read more
    - **Include external companies in collaborative reviews** – External companies can now participate in collaborative reviews in Microsoft Office 365. Previously, you could only send collaborative reviews to people within your company. You can also request that the validation for internal companies is turned off. Read more
    - **Macro-enabled files in collaborative reviews** – You can now send macro-enabled Microsoft Office files (.docm and .xlsm files) for collaborative reviews in Office 365. Previously, macro-enabled files were not supported.
- **Viewer**
    - **Callout annotation** – The callout annotation has been added to the PDF viewer. Read more
    - **Carry forward links in annotations** – Annotation links are now included when you choose to carry forward associated links in a document revision, with the exclusion of Defect links. If the setting Carry forward links is enabled (Project settings > Document > **Upload**) when documents are revised, links created in annotations are carried forward in the next revision. Previously, only links from the links tab were included.
    - **Enable loading of macro-enabled file types** – You can now view macro-enabled Microsoft Office files (.docm and .xlsm) in the PDF viewer. Previously, macro-enabled file types could not be loaded.
    - **Additional Save prompts –** Save prompts are now shown when windows are closed or when closing the viewer tab to ensure that you save all markups. Read more
- **Transmittals**
    - **Transmittal attachments preview** – You can now open a transmittal attachment preview in a new window, so you can view the pages before you download it. Read more
    - **Default maximum size of attachments** - To improve management of attachments, the default maximum size of attachments has been reduced to 50MB. Any attachment exceeding this size will be automatically provided as a link.

- **Packages**
    - **Package attachments preview** – You can now open a package attachment preview in a new window, so you can view the pages before you download it. Read more
    - **Package history –** An audit history of actions is now included in both the tender and standard packages, allowing you to view key actions that have taken place against the package.
    - **Default maximum size of attachments** – To improve management of attachments, the default maximum size of attachments has been reduced to 50MB. Any attachment exceeding the maximum size is automatically provided as a link.
- **Contacts**
    - **External contact permission checking** – When checking user permissions for sending mail, transmittals, or forms, to ensure the correct access, Document now checks whether the external contact is a user first. Previously, Document checked to see if a contact was an external contact first.
- **Reports**
    - **Sign in details included in 02.020 - Session History Details** – An update to the report lets you see how a user has signed into InEight Document and whether it is through XL Upload, the web interface, or the mobile application. This provides enhanced reporting functionality for user management.
- **Mail**
    - **External processing support through customization** – Users who are cc'd now are included on responses from external contacts when responding to Document mail from outside the system. Contact your product or project delivery representative for more information.
    - **Default maximum size of attachments** – To improve management of attachments, the default maximum size of attachments has been reduced to 50MB. Any attachment exceeding the maximum size is automatically provided as a link.
- **Exports**
    - **Export Mail and Forms data in an expanded view** – When exporting data from the Mail or Forms module, you now have the option to export data in an expanded view. The expanded view shows dynamic tables, which are included in the form or mail type selected. Read more

- **General**
    - **Multi-select fields –** To improve the user experience, when multi-select fields are used, selected values show at the top of the list. Both lists are shown alphabetically.
    - **Additional applications link** – The Additional applications link (Help > **Additional applications**) has been updated to go to the learn.ineight.com Links and Downloads section of the Resources page for the Document Enhanced UI.
    - **Email address domain** – New email addresses are now in the doc.ineight.com domain. Existing email addresses are retained and supported.
    - **GetMailDetails API** – The GetMailDetails API now includes the mail priority information.
    - **Audit history code and title**– Wherever history log data is captured, the code or title for data is now shown instead of the internal code to make the information consumable.

Mobile Release Notes

- **Forms**
    - **Identify parallel reviewers**– The Forms module now identifies parallel reviewers when you save a form while other users are working in it at the same time. Read more
- **Documents**
    - **Compare files** – You can now compare files using the mobile PDF viewer. Read more
    - **Revisions tab** – The new Revisions tab shows all revisions associated to a document. Read more
    - **Project customization support** – Customizations that were applied to the web project are now available on the mobile app.
    - **Callout annotation** – The callout annotation has been added to the mobile PDF viewer. Read more
- **General**
    - **Foxit version 9.0 support** – The PDF viewer now supports Foxit version 9.0.
    - **Open registers from widget tile headings** – You can now click a widget tile heading in the mobile app dashboard to open the corresponding register. Read more
    - **Open links in mobile app by default** – You can now open links in the app without responding to a prompt first. Previously, you had to be prompted to open a link in the app or browser.

- **Gallery performance –** The mobile app no longer stops responding when you view and upload gallery items.

Documents

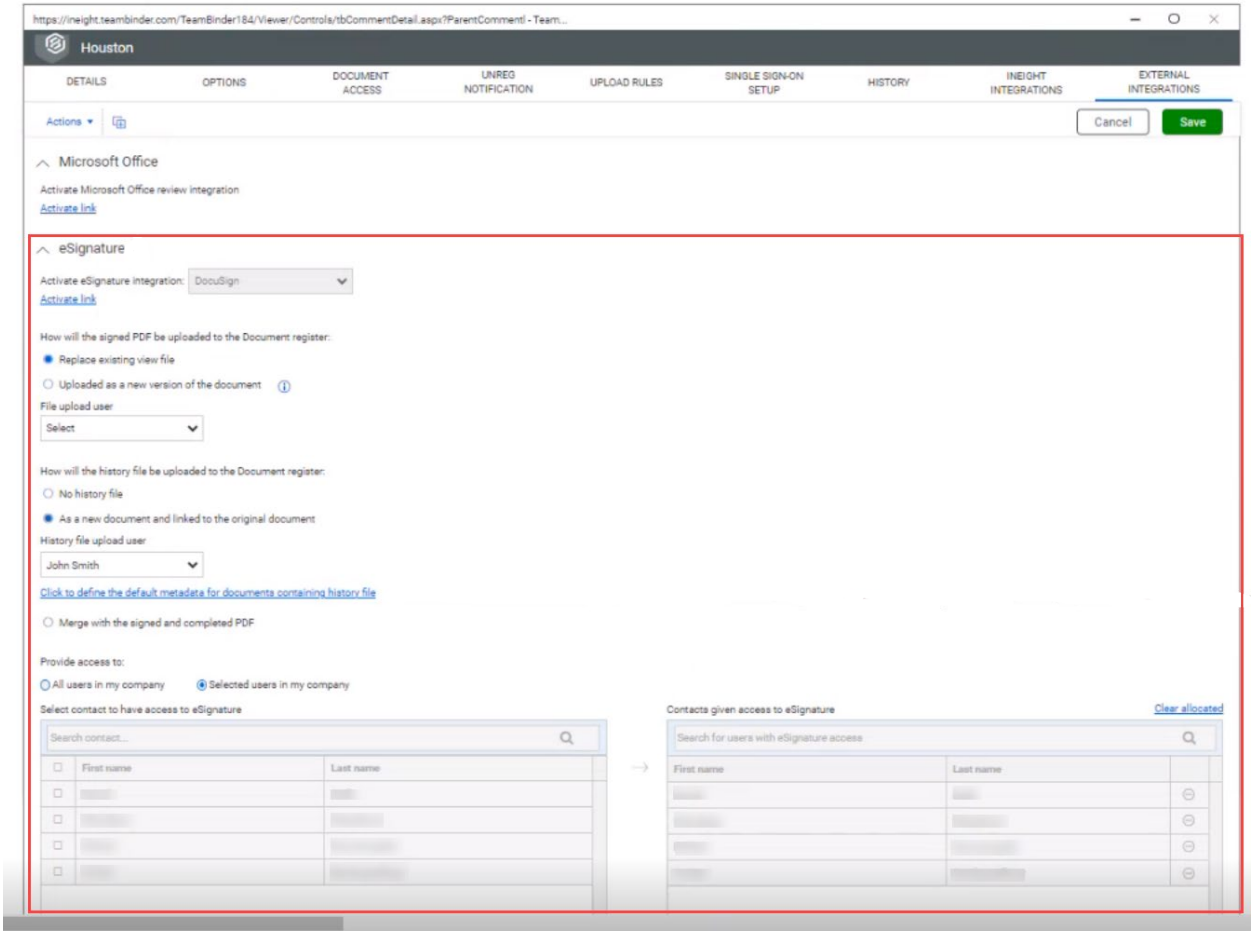
eSignature integration with DocuSign

The document must be unrestrained, and only one file type can exist in the document. eSignature functions are not associated to document workflow.

Before using DocuSign eSignature integrations, you must complete the applicable configuration in DocuSign.

Document configuration

DocuSign integration in Document is configured at the company level. The eSignature section has been added to the External integrations tab of the Companies configuration page, where you activate the DocuSign integration.



Before you implement DocuSign integration, consider the following configuration areas:

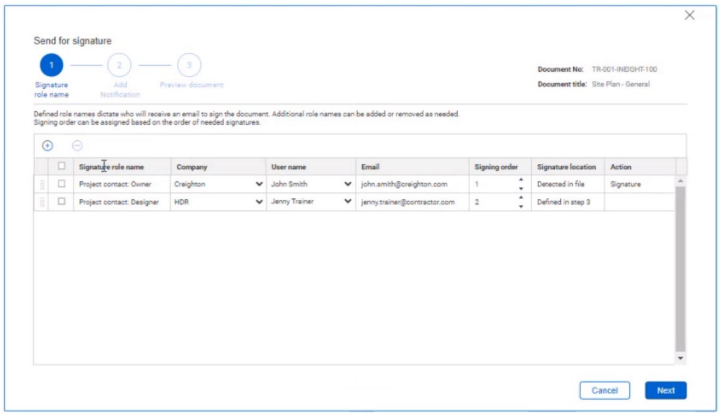
- How the signed PDF is uploaded to the Document register after all signatures are collected. You can indicate whether to replace the existing document or upload the signed document as a revision.

- How the history file is uploaded to the Document register. You can indicate whether you want a signature history file to be uploaded and if so, the name of the person who uploads the history file and whether it is a separate document or merged with the completed file. If you upload the history as a new file, you can also define the default attributes.
- Who can send documents to eSignature. You can give access to DocuSign to the entire company or to selected users to help you manage envelope costs.

Send a document for eSignature

You can send a document to DocuSign from the register or from the document itself. The option Send for signature has been added to the Actions menu on the Documents register and in the document.

When you click **Send for signature**, a wizard opens to assist you in setting up signers and adding a message to the email notification that DocuSign sends. If roles have been defined prior to upload, they will be detected and displayed in the wizard.



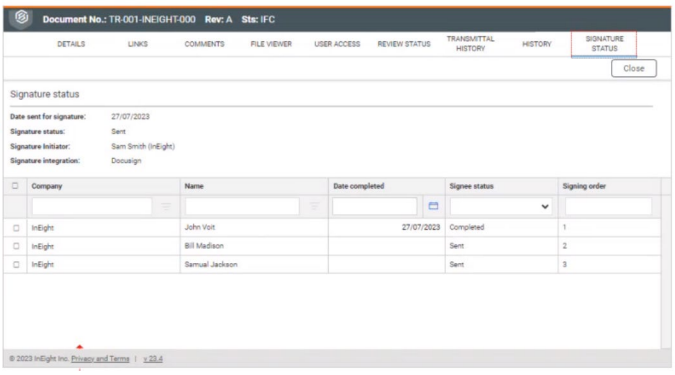
After all steps in the wizard are completed and the document has been sent, DocuSign then sends emails to the signees according to the signing order specified in the wizard.

DocuSign returns the signed document, and then Document uploads it to the register according to the eSignature configuration. Document also sends a notification that includes a link to the document.

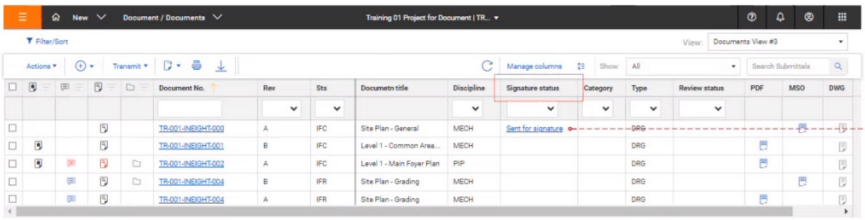
Signature status

You can track the status in the document or in the Document register.

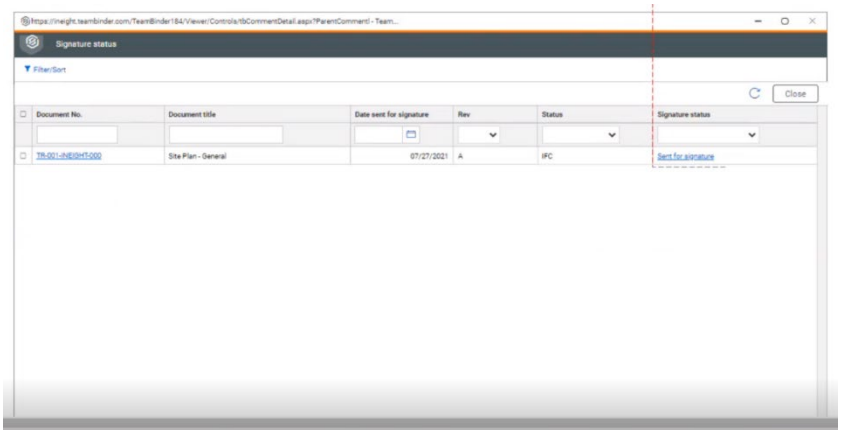
The Signature status tab has been added to the document record. The column is visible when integration is enabled.



The Signature status column has been added to the Document register. The column shows the status of the item. You can click the item to go to the Signature status tab for more information.



You can also view the statuses of all items that have been sent to DocuSign. The View signature status option has been added to the Action menu on the Document register. When you select **View signature status**, a dialog box shows the documents that have been sent for eSignature and their statuses.



Include external companies in collaborative reviews

If you have requested the validation to be turned off, Document no longer validates that collaborators are from the same company. You must ensure that the external companies can access your OneDrive location, so they can access the files. You must ensure that access is addressed with your IT team prior to enabling the function through InEight.

If you want to allow external companies to access collaborative reviews, contact your InEight representative.

Viewer

Callout annotation

The callout annotation includes an arrow and a text box, so you can add text and point to an area of the document. You can right-click the callout to access the callout properties, where you can adjust the appearance and font of the text box.

The Callout icon has been added to the PDF Viewer toolbar.

Additional Save prompts

More improvements have been made to ensure a user does not navigate away from the viewer with unsaved markups, which includes closing the details page (browser page) or closing the page from the viewer option. A prompt shows if unsaved markups are detected.

Transmittals

Transmittal attachments preview

The Attachments tab now includes the File viewer icon. Click the icon to open the attachment in a viewer. The viewer has the viewing and download functionality of the PDF viewer, but it does not have markup tools.

Packages

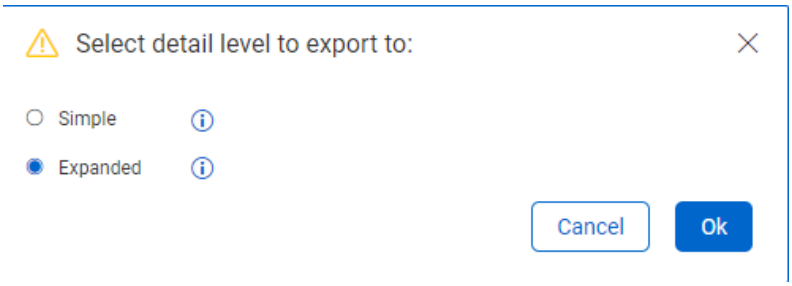
Package attachments preview

The Attachments tab now includes the File viewer icon. Click the icon to open the attachment in a viewer. The viewer has the viewing and download functionality of the PDF viewer, but it does not have markup tools.

Exports

Export Mail and Forms data in an expanded view

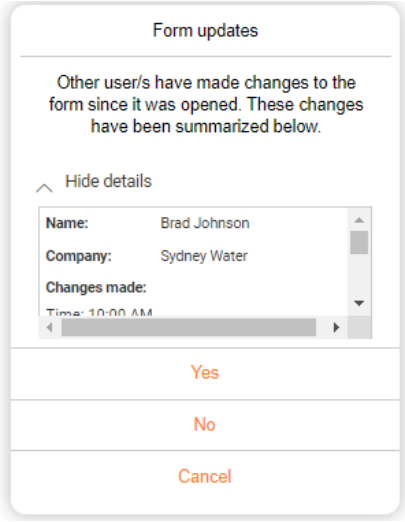
Additional options are provided now when selecting a mail or form type that includes dynamic table data. Users will be prompted to select either a simple view that matches the register set up or an expanding view that includes table data in the selected mail or form type.



Mobile forms

Identify parallel reviewers

The list of comments shows the name of the person who made comments, the company, and detailed comment information.

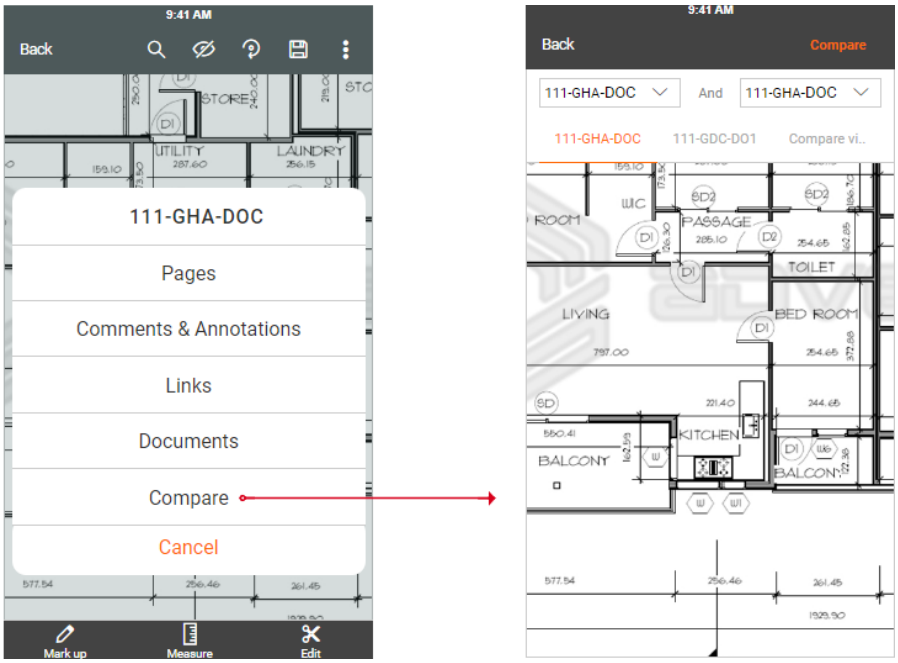


The list of comments also can help you see comments that you might potentially miss when you close the form.

Mobile documents

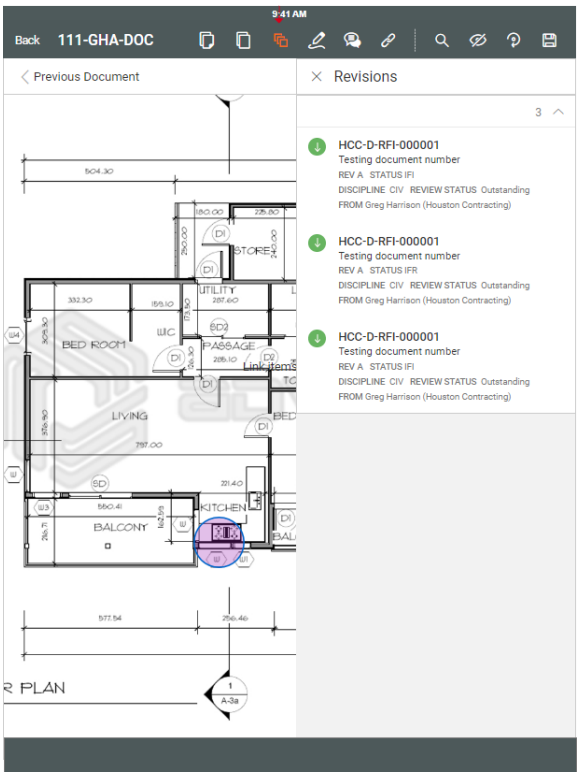
Compare files

The compare function lets you compare revisions without returning to the documents register. You can now select a previous document version for comparison. The document selected is overlaid on top of the original file.



Revisions tab

The revisions show as a list.



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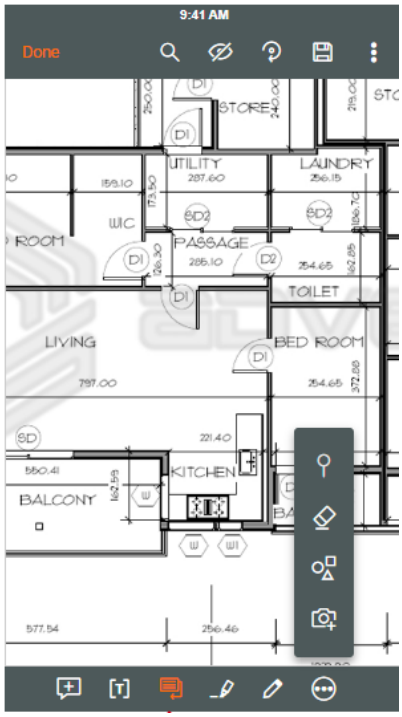
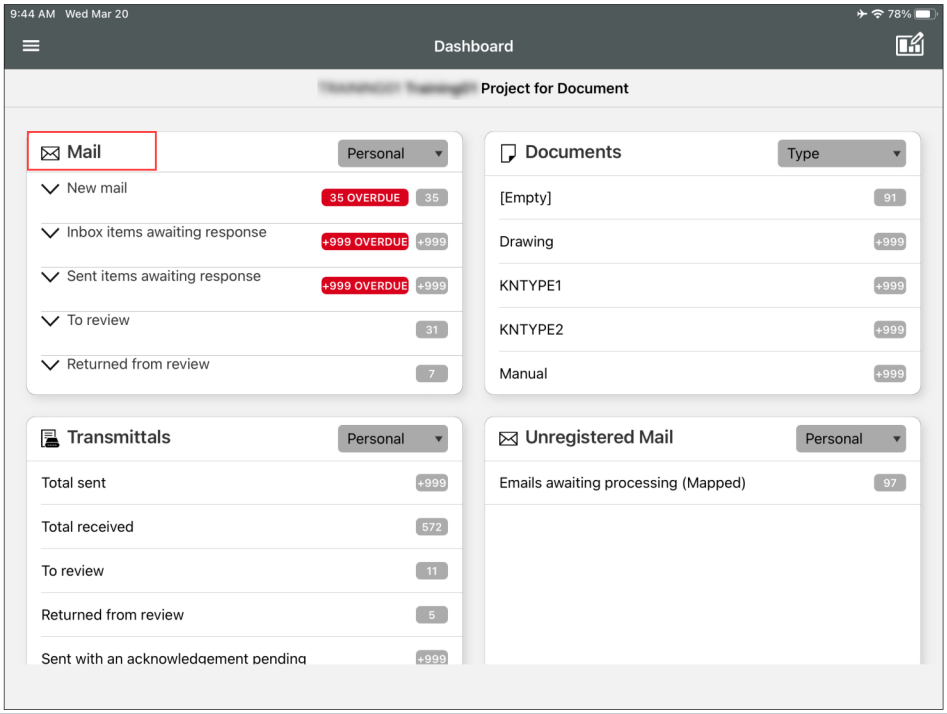


Mobile general

Open registers from widget tile headings