INEIGHT®

Document 24.7 Enhanced UI

HEALTH

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 | 04-JUN-2024 | Initial Release |
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| | | |



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What's new in Document 24.7

Web Release Notes

- Documents
 - Enhanced navigation and search in folder export The Document register export now includes an interactive interface that lets you navigate to files, search for files, and filter files based on metadata. <u>Read more</u>
 - **eSignature parallel sequence signees** You can now have multiple signees in the same position in the signing order. The signees at the next step receive notification after all the signees at the previous step have signed.
 - Manage columns in Holding area You can now manage columns on the Document processing page in the Document Holding area. You can now drag and drop columns in the grid. The columns remain in the new arrangement after closing and reopening the Holding area document processing page.
 - Carry forward bulk upload view files When you upload documents in bulk, you can now specify whether to carry forward files when the status is changed. <u>Read more</u>
 - Bluebeam Studio Session support for digitally signed files Previously, if the PDF file was digitally signed, it could not be sent for Bluebeam Studio Session review. Now, if required, a project option can be activated upon request to automatically flatten the PDF, and then send it for Bluebeam Studio Session review. To request this feature, contact your InEight representative.
 - Microsoft Office integration retain access for reviewers Previous reviewers and the review coordinator now retain access to a document following the completion of their MS Office review.

• PDF Viewer

- **User data in stamps** User data, such as username and date, are now shown in the dynamic stamps in the PDF viewer. Previously, generic text was shown.
- Publish Text in markups to the Comments tab Text added to any markup, including notes and shapes, now shows in the PDF viewer Comments tab. Previously, the comments referred you to the PDF.
- Typewriter annotation in PDF viewer The Typewriter annotation has been added to the PDF viewer. This markup lets you enter text without a text box. <u>Read more</u>
- PDF viewer Next and Previous buttons in top toolbar The Previous Document and Next Document buttons have been moved into the top toolbar, so they are easily available. These buttons are also now available in the viewer on the Manage workflow, Review, and Release registers. <u>Read more</u>



- Table of Contents in Manage workflow, Review, and Release registers The table of contents has been made available in the left pane of the Manage workflow, Review, and Release registers and functions the same as the document register, where the current list of documents is available in the list.
- Slide-out panel added for font and line style updates The font and line style tools are now in an easily accessible slide-out panel, so you can quickly access the formatting tools. <u>Read more</u>

Administration

- Public and private redlines and comments on restrained documents You can now configure whether any user or reviewer can comment or redline documents while the documents are in review. New Document project settings let you control whether comments and redlines can be added to review documents and who can add them. <u>Read more</u>
- Forms and Packages communication matrix for eSignatures The Forms and Packages modules are now included in the communication matrix. You can use the communication matrix to control to which companies, a specified company, can send eSignature documents, forms, and packages.
- Control access of forms on personal or company levels The user access for forms (Admin > Manage user Access > Forms) can now be specified on a personal, department or company level for each form type. <u>Read more</u>
- Forms
- Duplicate a form as a new revision You can now duplicate a form as a new revision from the Details page. Previously, you could duplicate a form only as a new form. Now, the Duplicate action in the Actions menu has options for New Revision and New Form.
- Submittals section Forms now have the option to add a Submittal section. Any linked submittals added are shown, and the status can be managed by users with applicable access. <u>Read more</u>
- Submittals
- Activate self-perform mode in bulk The Activate self performing mode toggle has been added to the top of the Change Submittal details page (Actions > Admin > Change submittal details), so you can enable or disable self-perform mode for multiple submittals that are in the *Draft* state. <u>Read more</u>
- Create form from submittals You can now create forms from either the submittal Details page or the submittal register. Forms created from the register can be linked to multiple submittals. Forms created from the submittal details are automatically linked. <u>Read more</u>



- Checklists
- Assign checklists to roles You can now issue a checklist to a role instead of to an individual user or contact group to give you more flexibility when assigning checklists. You can also define a role as a verifier. <u>Read more</u>
- **Checklist builder rich text** The checklist builder now supports rich text in the field details, so you can format field text or add links. <u>Read more</u>
- Dashboard
- New transmittal statistics The Received with an acknowledgement pending, Received with a response outstanding, and Total responded statistics have been added to the Transmittals widget tile.
- Reports
- **Document register by file name report** The 04.250 Document register by file name report has been added. The report includes the standard document report data with an additional column for the file name.
- API
- List canceled mail or transmittals through an API You can now use APIs to list canceled mail or transmittals items.
- Forms and packages support in communication matrix updates The Forms and Packages APIs now support the communication matrix .
- **Document comments close-out** You can now close out Document comments using the API.



Documents

Enhanced navigation and search in folder export

An HTML interface (index.html) has been added to the folder extract. When you open the index, a folder structure and a grid are shown.

| Training01 Project for Document | 00000 - 00000 | 00 | | | | | | F | Filter | _ |
|---------------------------------|---------------|--|-------|-------|------------------------------|------------|----------|---------|---------------|------|
| a 00000 - 000000 | View Files | DocumentNo | Rev | Sts | DocumentTitle | Discipline | Category | Туре | Review Status | Tag |
| LARGE1 - LARGE1 | | 000000000000000000000-1111111111111111 | A | IFI | Testing long document number | 001 | ATR | DRAWING | Un-Restrained | test |
| E KW - KW | PNG | 01072020DOCLK-01 | CN-00 | IFI | 01072020doclk-01 | MISC | ATR | KNTYPE1 | Un-Restrained | |
| 28 Folder | PDF | 1126-CN-00001 | В | IFI | 1126-CN-0000- TITTLE | CIV | C10 | DRAWING | Un-Restrained | |
| | PDE PNG | 511-L0T-001 | к | RL-ST | 111-333 | CIV | C12 | DRAWING | Un-Restrained | |
| 늘 TS-3 - TS-3 | DWG, PDF, PNG | CN-DOC-1212020-0001 | A | IFI | CN-DOC-1212020-0001 | CIV | C10 | KNTYPE2 | Un-Restrained | |
| | | | _ | - | | - | - | - | | |
| | | | | | | | | | | _ |

The grid shows the files in a folder along with document metadata. You can use the folder structure in the left navigation pane to go to a folder, or you can use the search feature and filter by metadata to help you locate what you are looking for. You can then click the link in the View Files column to open the file.

Carry forward bulk upload view files

The Carry forward view files from the previous status check box has been added to the Bulk upload dialog box for each document.

| 1 🛟 new rows 💿 🛞 🕂 + Copy attributes Get attributes - Defiverable item: 💿 Validate Cancel Save | | | | | | | | | |
|--|-------------|------------|---------------------|---|--------------------|----------|-------------|--|--|
| * | Files | * Revision | Superseded revision | Carry forward view files from the previous status | * Document No. (1) | Received | Sender comp | | |
| | 🔁 Add files | Select one | | ³ | | | Select one | | |
| | Add files | Select one | | | | | Select one | | |

When the check box is selected, Document carries forward the same file when the status is changed. Existing files are not carried over if a new file has been attached to the document.

PDF Viewer

Typewriter annotation in PDF viewer

To use the Typewriter annotation, click the **Typewriter** icon in the Markup toolbar. You can then start typing in your document. The text shows without a text box.



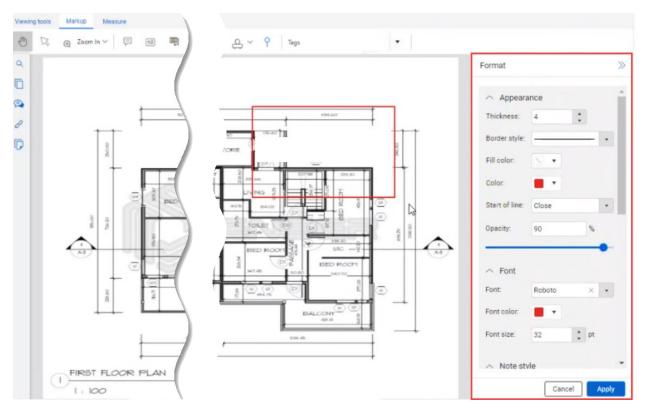
| | | | | DETAI | L | LINKS | COMMEN | VTS | FILE VIEWER | USER ACCESS | REVIEW STATUS | TRANSMITTAL HISTORY |
|-------|----------------------------|-------|------------------------|------------|----------|-------|---------|------------|-------------|-------------|---------------|------------------------|
| Filen | ames: PDF - A-D8-T1-S1.pdf | • | ම ^ම Compare | Select one | • | | < Previ | ous Docume | nt Next I | ocument > | | |
| ۹ | Viewing tools Markup Me | asure | | | | | | | | | | |
| 0 | 🖑 🕞 🕀 Zoom In 🗸 | Ţ. | ŢĮ Ę | | Square 🗸 | l | | <u>e</u> ~ | 9 Tags | | • | New defect |
| 9 | | Ţ | ypewriter | | | | | | | | | |

The text shows in the Comments & Annotations panel as comments.

PDF viewer Next and Previous buttons in top toolbar

| | DETAIL | LINKS | COMMENTS | FILE VIEWER | USER ACCESS | REVIEW STATUS | TRANSMITTAL HISTORY |
|----------------------------------|------------|-------|----------------|--------------|-------------|---------------|------------------------|
| File names: PDF - A-D8-T1-S1.pdf | Select one | • | < Previous Doc | ument Next D | ocument > | | |
| Q Viewing tools Markup Measure | | | | | | | |

Slide-out panel added for font and line style updates



When you click an annotation, such as a shape or text, a slide-out panel with the formatting tools opens.

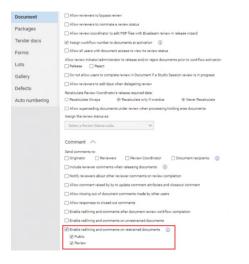
This panel remains visible while you are formatting. You can then click the **Apply** button to apply the formats and close the panel.



Administration

Public and private redlines and comments on restrained documents

The Document project setting Enable redlining on restrained documents (Project settings > Document > **Comment**) has been adjusted to Enable redlining and comments on restrained documents. Public and Review options have been added, so you can specify who can comment.



When the setting Enable redlining and comments on restrained documents setting is selected, you can choose whether users with document access or only reviewers can make annotations or comments. When the *Public* option is selected, comments and redlines can be made by any user with access to the document while it is in review. When the *Review* option is selected, only users involved in the document review can comment.

Control access of forms on personal or company levels

The Visibility column has been added to the Form security. You can set the form access for a security group to Personal, Department, or Company at a form type level.

| 20 Manage administrators | Mar | nage user acces | S: CLIENT | Access type: For | •••••••••••••••••••••••••••••••••••••• | | | |
|--|-----|-----------------|------------------------------|------------------|--|------|------|------------|
| Manage administrators for the project | | Security group | Title | Form type | Title | Read | Send | Visibility |
| Manage user access | 6 | CLIENT | Client | HP | Hold point | | | Company |
| Define/Maintain user access and security | | CONS | Consultant | NCR | Non conformance report | | | Personal |
| Configuration tables | | CONSTR | Construction | RFI | Request for information | | | Departm |
| Define/Maintain configuration tables | | HCON | Head Contractor | TR | Test request | | | Company |
| Manage document rules | | HCON-RES | Head Contractor - Restricted | WP | Witness point | | | Departm |
| Define/Maintain document workflow rules | | PMCA | PMCA | DOR | Daily concrete request | | | Company |
| | | SUB | Subcontractor | DAR | Document action request | | | Personal |
| Project calendar Define/Maintain working days | | TENDER | Tenderer Access Group | | | | | |
| | | TENDER | Tenderer Access Group | | | | | |



Forms

Submittals section

The new Submittals section can be added to forms by request. To link a submittal, click the **Add** icon in the Submittals section, and then select from a list of submittals. The selected submittals show in the Submittals section. The links to the submittals show in the Links tab.

| Actions | Configure workflow Area: Select one | | | | Cancel | Save Co | |
|--|---|--|--------------------|-----------|----------------|---------|---------------|
| | | | | | Cancer | Save Co | omplete activ |
| Select one | Select one | | Loc | ation: | | | |
| | | | ▼ S4 | elect one | | | |
| BMLTFORM by | | | | | On: | | |
| Houston Contracting | • | Greg Harrison | | | • 24- | 07-24 | Ē |
| eated by: Greg Harrison (Houston Contracting) st edited by: | | On: 24 July 2024 On: | 4, 03:06 AM +05:30 | | | | |
| ∧ 🕑 Attach files • \downarrow Download all \downarrow Do | ownload selected | | | | | | |
| | | | | | | | ±Θ |
| | Document No. | Type There are no attachments uploaded | | Size | | | |
| tems: 0 | | | 1. | Size | | | |
| tems: 0 - Submittals | | | | Size | | | date status |
| tems: 0 I - Submittals ① ③ | | | | Size | Туре | | |
| tems: 0 1 - Submittals | | There are no attachments uploaded | | | Type Design | | |

If you have the applicable access, you can also manage the submittal status from the form by selecting a status from the Status column drop-down list.

To request the Submittals section in forms, contact your InEight representative.



Submittals

Activate self-perform mode in bulk

| | | | | | | DETAILS | | | | | |
|----------------------------|----------|---|------|-----------------|-----------|----------------|--------------------|-------------------------------|-------------------|------------------------------------|--------|
| rate self performing mode: | ,» | | | | | | | | | | Cancel |
| sittal No: | | | Titl | tle: | | | | | Revision: | | |
| 000009 | | | | Testing 6/2 | | | | | Select a Revision | | |
| iption: ting 6/2 - 2 | | | | | | | | | | | |
| | | | | | | | | | | | |
| dbe | | | Dat | ate Created | | Issued to come | | | Issued to user | | |
| dhe | | | Da | ate Created | | Issued to com | | | Issued to use | | |
| | ?S | | | Milestone dates | (g) CON | Issued to com | In | | | uning float 0 days (1) - 10 | |
| icheduled date | | _ | | Milestone dates | E Con | | ła | Forecasted | | | |
| cheduled date | es value | | | | | | iv Float (days) | 1 100 100 100 | | Actual completion date | Compl |
| cheduled date | | ä | | Milestone dates | Scheduled | | Float (days) | Forecasted Duration (days) | Rema | | Compl |
| | Value | 6 | | Milestone dates | Scheduled | | | Forecasted Duration (days) | Rema | | Compl |

Create form from submittals

The Create a form button has been added to the Submittals Details page. To create a form from the submittal, click the **Create a Form** button, and then select the form type. After the form is saved, it is automatically linked to the submittal.

| | | | DETAILS DELIV | ERABLES COMMENTS DO | SUPPORTING CUMENTATION LINKS | HISTORY | ANSMITTAL USER SECURITY | | | |
|--|-------------------|---|----------------------------------|--|---------------------------------|-------------------------|--|-----------------------------|------------------------|----------|
| Ursi Draft | Closed out date: | | Transmit Activate self per | forming mode: Create a form | • | | | | Cancel Save a | as draft |
| omittal No: | | | * Title: | | | | | * Revision | | |
| 24-07-25-2 | | | 2024-07-25-2 | | | | | ddd - SSSDDDD | | |
| | | | | | | | | | | |
| ວາາອັດປາຍັດ ບໍລິແຮ | - | | estone dates | | | | | -nerg Total 40 | 57577 | |
| | Value | | Miestone | Scheduled | Completion date | Elast (dava) | Forecasted Deration (deed) | | Actual completion date | Complete |
| icheduled item | | 8 | | Scheduled Duration (days) 567567 | Completion date 31-12-25 | Float (dayn) () 5555 | Forecasted Duration (days) 55577 | Completion date 31-12.25 | | Complete |
| Scheduled item | Value | | Milestone | Duration (days) | | | Duration (days) | Completion date | | |
| Scheduled litem Wick off date Lead time Late execution date | Value 16-07-24 | | Milestone Submission due date | Duration (days) 567567 | 31-12-25 | ③ 5656 | Duration (days) 56567 | Completion date 31-12-25 | | P |

The Create a form option has been added to the Actions menu on the Submittals register. To create a form from the register, select one or more submittals, expand the Actions menu, and then click **Create a form**. You can then select the form type. The form is created, and the form is linked in each of the submittals.



| ≡ © | New 💛 | Document / Sub | mittal 🗸 | | | | | | | ~ | | | | | | © © © |
|---------------|------------------|----------------|----------------------|-------|--------------|------------------|-------------------|------------|---------|---------------|---|---------------------|---------------------|---------------------------|-----------------------|--------------------|
| Y Filter/Sor | et | | | | | | | | | | | | | | View: Unsaved (C-L-00 | 1) 💌 |
| Actions * | • • | 🕞 🔹 🛛 Tran | smit 🝷 Create Set | Issue | submittal | | | | | | | | С | \Xi Clear all filters 🛛 🛚 | lanage columns \$∃ s | earch Submittals |
| Admin | | • p it here to | group by that column | | | | | | | | | | | | | |
| Import Subm | nittals from Exc | el | | | | | | | | | | | | | | |
| Create a form | m | • 001 | | | Deliverables | Status | Date created | | Rev | Created by | | Issued to company | Issued to name | Area | Discipline | Submittal category |
| | | = Audit/Revie | w | Ŧ | | | | B = | | | Ŧ | | 7 7 | | • | 5 |
| 2024-07-2 | 5-2 | | | | | DRAFT | 25-07-24 08:50 AM | | SSSDDDD | Greg Harrison | | | | @#111 | 11 | SC02 |
| 2024-07-2 | 5-3 | | | | | DRAFT | 25-07-24 08:52 AM | | 111 | Greg Harrison | | | | SP&FORM | 23444 | SC03 |
| AUTO | | | | | | DRAFT | 25-07-24 08:49 AM | | | Greg Harrison | | AR Company | AR2 AR2 | SCRIPT | 11 | SC02 |
| HCC-8MILE | ES-001 | | | | 10 | OUTSTANDING | 23-07-24 11:52 PM | | 3 | Greg Harrison | | | | 000 | 8MILES | SC05 |
| AUTO | | | | | 10 | DRAFT | 23-07-24 10:22 AM | | SSSDDDD | Greg Harrison | | | | | | |
| NSK20240 | 0724-005 | | | | 1 | SUBMISSIONCOMPL | 24-07-24 12:41 PM | | 3 | Greg Harrison | | BMW | Henry Baker | AAA | BBBBBB | SC04 |
| NSK20240 | 0719-002 | | | | 10 | OUTSTANDING | 19-07-24 03:14 PM | | SSSDDDD | Greg Harrison | | BMW | Henry Baker | 000 | 8MILES | SC03 |
| 1234 | | | | | | DRAFT | 09-07-24 02:46 PM | | SSSDDDD | Greg Harrison | | | | SP&FORM | NKR DSC 01 | SC02 |
| 123455 | | | | | | DRAFT | 09-07-24 02:52 PM | | SUBX | Greg Harrison | | Houston Contracting | Greg Harrison | SCRIPT | NKR DSC 01 | SC02 |
| NSK20240 | 0703-001 | | | | 10 | OUTSTANDING | 03-07-24 11:31 AM | | 3 | Greg Harrison | | BMW | Jhon Kelly | 00.0.0 | 234442 | SC03 |
| AUTO | | | | | | DRAFT | 01-07-24 12:26 PM | | SUBX | Greg Harrison | | | | @#111 | NKR DSC 01 | SC03 |
| 12345 | | | | | 1 🖸 | OUTSTANDING | 28-06-24 04:33 PM | | SUBX | Greg Harrison | | | | @#111 | 23444 | SC02 |
| 3000X | | | | | 10 | OUTSTANDING | 26-06-24 12:40 PM | | SSSDDDD | Greg Harrison | | AR Company | supun form1 | @#111 | NKR DSC 01 | SC04 |
| NSK20240 | 0604-001 | | | | 1 🔘 | SUBMISSIONCOMPL_ | 04-06-24 12:27 PM | | 3 | Greg Harrison | | BMW | Henry Baker | NSK-A1 | NSK-D1 | SC02 |
| NSK20240 | 0603-002 | | | | | DRAFT | 03-06-24 01:53 PM | | 3 | Greg Harrison | | NSK@#\$% | Sanali Kotuwegedara | NSK-A1 | NSK-D1 | |
| NSK20240 | 0320-004 | | | | 10 | DRAFT | 21-03-24 01:29 AM | | | Greg Harrison | | Houston Contracting | ADMIN G01 | | | |

Checklists

Assign checklists to roles

The Roles option has been added to the Select recipients dialog box for the For action.

The Verified by field has been added to the Verification section of checklists. This field lets you indicate whether a specific user or users in a role can verify the checklist.

| Material | | | | | |
|--|--|--------------------|----------|---|--|
| Ensure ERSED plan has been developed and co | mmunicated to alte team | | | | |
| Is the treee trunks diameter checked, marked a Tree trunks diameter checked Marked Inspected | nd inspected by ENM (boundary fencing) | 2 | | | |
| Is clearing boundaries' barrier as per design dw | 97 | | | | |
| Verification | | | | | |
| Venfied by | | | | | |
| Role | Verified on Date picker | Result O Passed | O Failed | • | |
| Comments | | | | | |
| | | | | | |
| | | | | | |

When *Roles* is selected, the Role field shows, and you can select the applicable role. When *All users* is selected, you can select the user company and user name.

Checklist builder rich text

The Type of text format field has been added to the Field details – Text area configuration table, where you can choose between Rich text and Plain text.



| < Field details - Text area |
|-----------------------------------|
| Details are automatically applied |
| Details |
| *Question text: |
| |
| Supporting text (i) |
| |
| |
| |
| Type of text format: |
| Plain text 🔹 |
| Plain text |
| Rich text |
| |