

Document 24.7 Enhanced UI 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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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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)

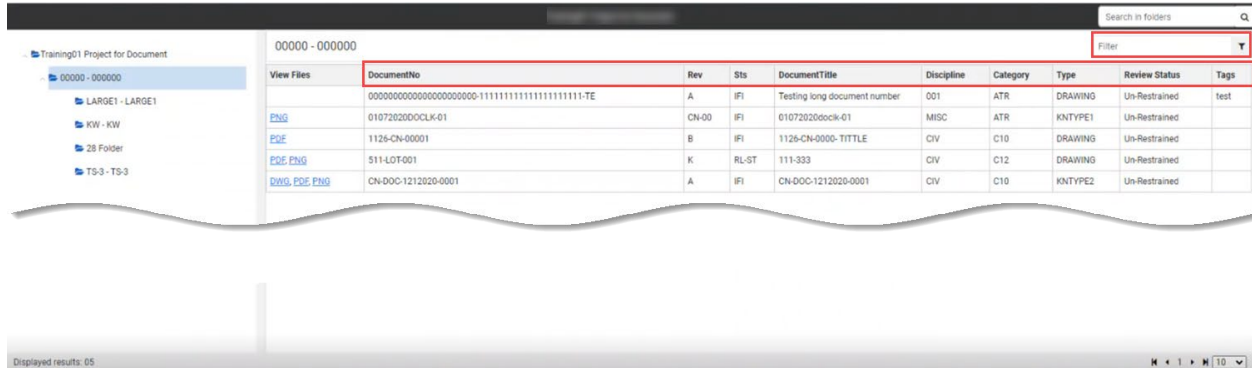
- **Table of Contents in Manage workflow, Review, and Release registers** – The table of contents has been made available in the left pane of the Manage workflow, Review, and Release registers and functions the same as the document register, where the current list of documents is available in the list.
- **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. [Read more](#)
- **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. [Read more](#)
 - **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. [Read more](#)
- **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. [Read more](#)
- **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. [Read more](#)
 - **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. [Read more](#)

- **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. [Read more](#)
 - **Checklist builder rich text** – The checklist builder now supports rich text in the field details, so you can format field text or add links. [Read more](#)
- **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

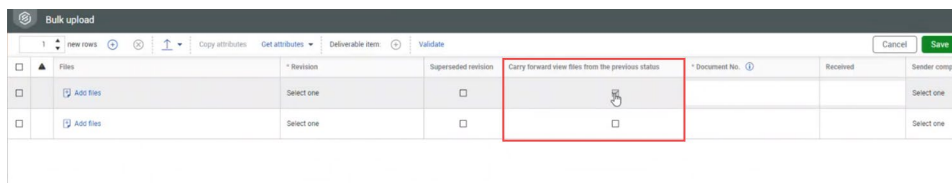
An HTML interface (index.html) has been added to the folder extract. When you open the index, a folder structure and a grid are shown.



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.

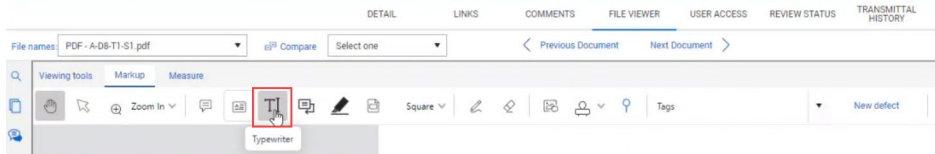


When the check box is selected, Document carries forward the same file when the status is changed. Existing files are not carried over if a new file has been attached to the document.

PDF Viewer

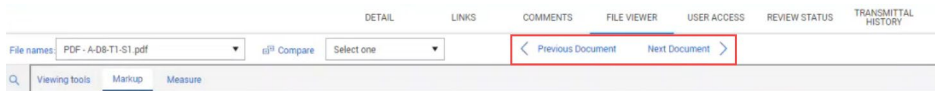
Typewriter annotation in PDF viewer

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.



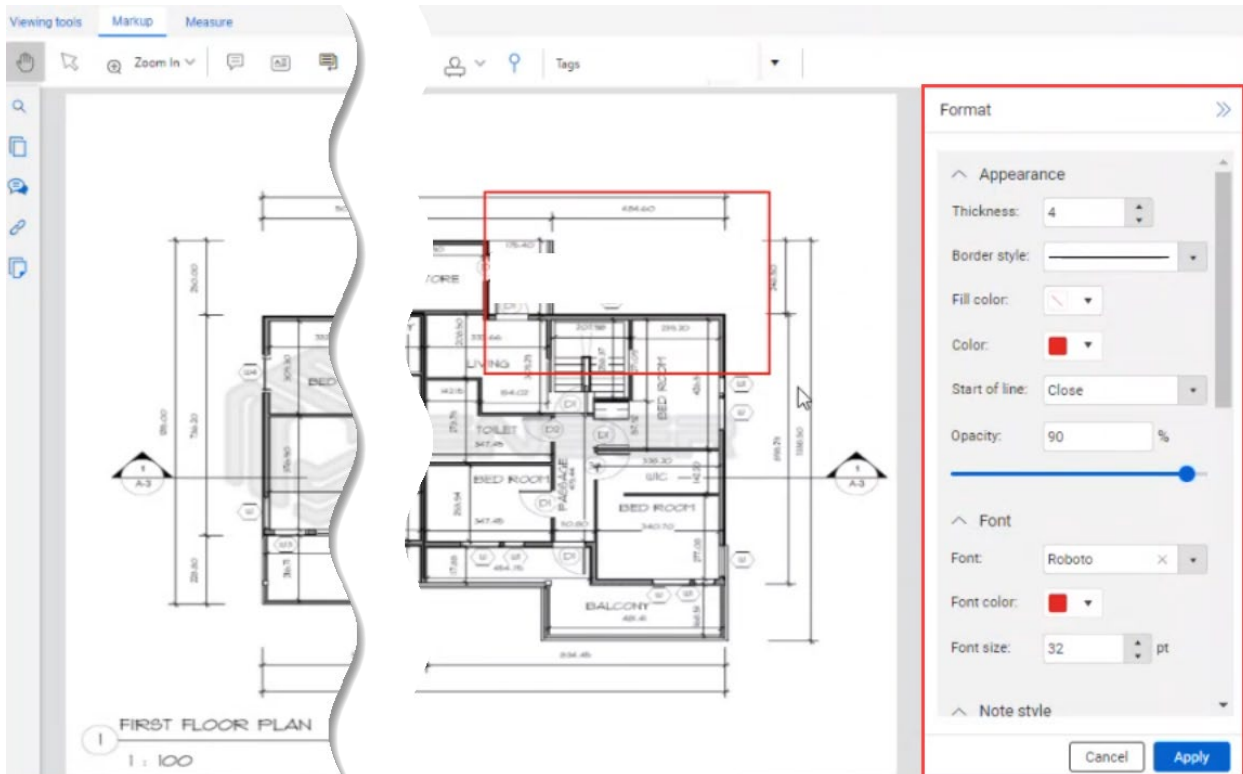
The text shows in the Comments & Annotations panel as comments.

PDF viewer Next and Previous buttons in top toolbar



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.

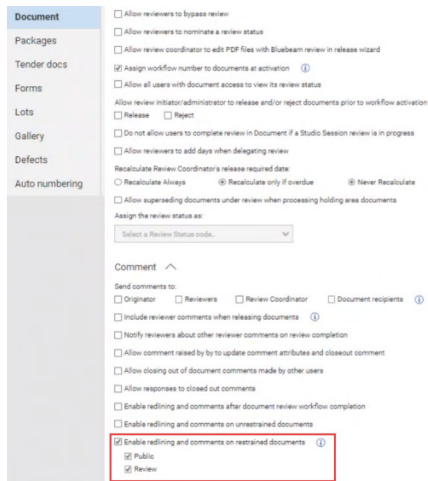


This panel remains visible while you are formatting. You can then click the **Apply** button to apply the formats and close the panel.

Administration

Public and private redlines and comments on restrained documents

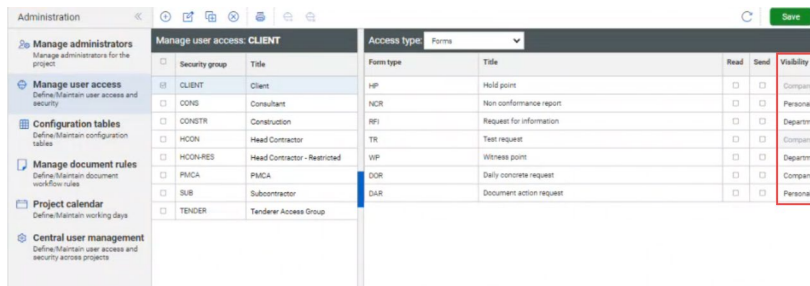
The Document project setting Enable redlining on restrained documents (Project settings > Document > **Comment**) has been adjusted to Enable redlining and comments on restrained documents. Public and Review options have been added, so you can specify who can comment.



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 a 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.



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.

The screenshot displays the InEight software interface for a form. At the top, there are tabs for 'DETAIL', 'LINKS', and 'HISTORY'. Below the tabs, there is a 'Status' dropdown menu set to 'Outstanding' and a 'Configure workflow' button. To the right are 'Cancel', 'Save', and 'Complete action' buttons. The form includes fields for 'Discipline', 'Area', and 'Location', each with a 'Select one...' dropdown. Below these are 'SUBMITFORM by' fields for 'Houston Contracting' and 'Greg Harrison', and a date field 'On: 24-07-24'. A section for attachments shows 'There are no attachments uploaded.' Below this is the '01 - Submittals' section, which contains a table with the following data:

Submittal No.	Status	Title	Revision	Type
00000000000000	Outstanding	000000000000	111	Design
0-0000005	75%	Testing numbering 1	111	Design

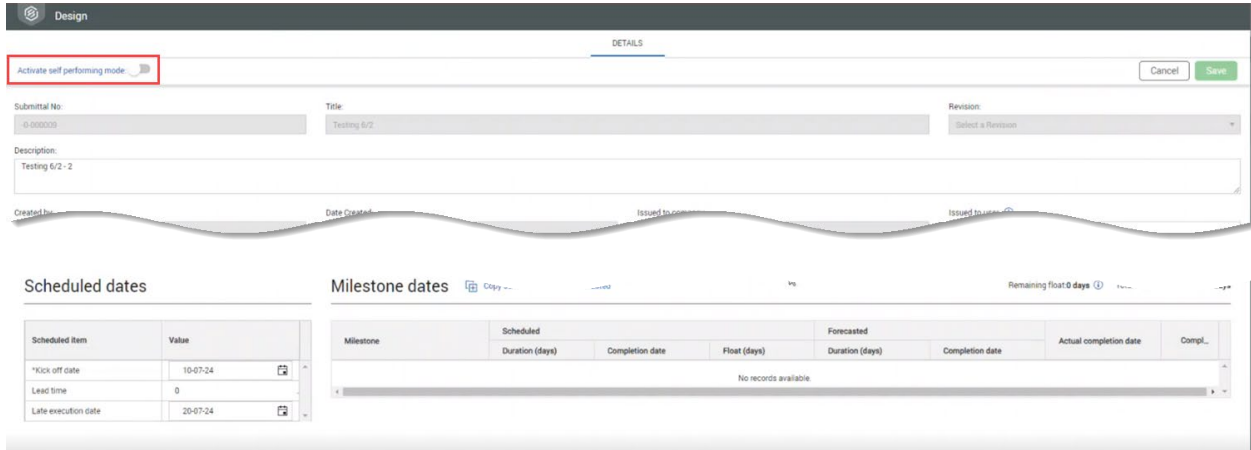
The 'Status' column in the submittals table is highlighted with a red box. Below the submittals table is the '02 - Body' section, which includes a 'Message' field.

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.

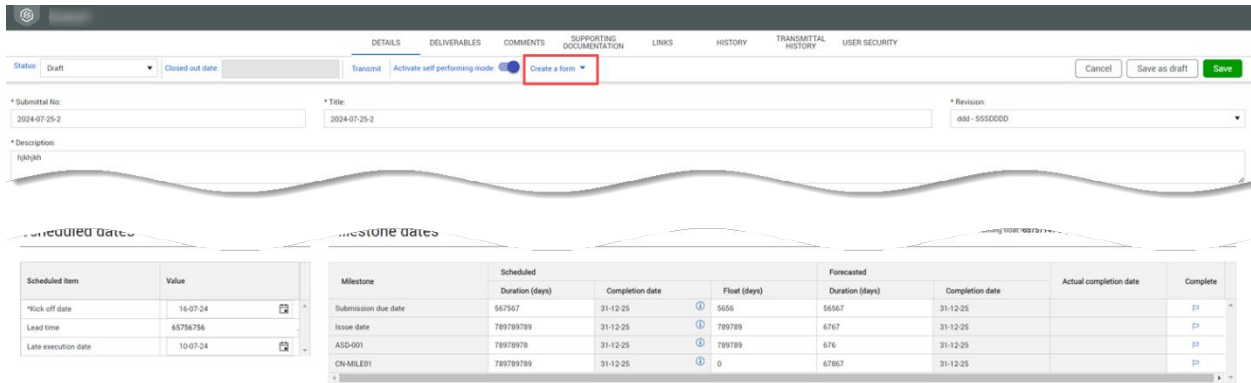
Submittals

Activate self-perform mode in bulk



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.



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.

Deliverables	Status	Date created	Rev	Created by	Issued to company	Issued to name	Area	Discipline	Submittal category
	DRAFT	25-07-24 08:50 AM	SSSDDDD	Greg Harrison			@#111	11	SC02
	DRAFT	25-07-24 08:52 AM	111	Greg Harrison			SP&FORM	23444	SC03
	DRAFT	25-07-24 08:49 AM		Greg Harrison	AR Company	ARZ ARZ	SCRIPT	11	SC02
	OUTSTANDING	23-07-24 11:52 PM	3	Greg Harrison			000	BMILES	SC05
	DRAFT	23-07-24 10:22 AM	SSSDDDD	Greg Harrison					
	SUBMISSIONCOMPL	24-07-24 12:41 PM	3	Greg Harrison	BMW	Henry Baker	AAA	BBBBBB	SC04
	OUTSTANDING	19-07-24 03:14 PM	SSSDDDD	Greg Harrison	BMW	Henry Baker	000	BMILES	SC03
	DRAFT	09-07-24 02:46 PM	SSSDDDD	Greg Harrison			SP&FORM	NKR DSC 01	SC02
	DRAFT	09-07-24 02:52 PM	SUBX	Greg Harrison	Houston Contracting	Greg Harrison	SCRIPT	NKR DSC 01	SC02
	OUTSTANDING	03-07-24 11:31 AM	3	Greg Harrison	BMW	Jhon Kelly	00 0 0	234442	SC03
	DRAFT	01-07-24 12:26 PM	SUBX	Greg Harrison			@#111	NKR DSC 01	SC03
	OUTSTANDING	28-06-24 04:33 PM	SUBX	Greg Harrison			@#111	23444	SC02
	OUTSTANDING	26-06-24 12:40 PM	SSSDDDD	Greg Harrison	AR Company	sapun form1	@#111	NKR DSC 01	SC04
	SUBMISSIONCOMPL	04-06-24 12:27 PM	3	Greg Harrison	BMW	Henry Baker	NSK-A1	NSK-D1	SC02
	DRAFT	03-06-24 01:33 PM	3	Greg Harrison	NSK#@5%	Sasali Khotwajedara	NSK-A1	NSK-D1	
	DRAFT	21-03-24 01:29 AM		Greg Harrison	Houston Contracting	ADMIN 001			

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 communicated to site team

Checked

Is the tree trunk diameter checked, marked and inspected by ENM (boundary fencing)?

The trunk diameter checked

Marked

Inspected

Is clearing boundaries barrier as per design/dwg?

Checked

Verification

Verified by

All users Roles

Role:

Verified on:

Result

Passed 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 

Type of text format:

Plain text	▼
Plain text	
Rich text	