Document 24.9 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	02-OCT-2024	Initial Release
2.0	07-NOV2024	Adds *Roles in reviews and workflows* and *Copy and paste markups* enhancements

Contents

What's new in Document 24.9

Web Release Notes

- **Documents**
    - **Send multiple documents for eSignature in a single envelope** – You can now include multiple documents in a single eSignature envelope, so you can avoid the expense of multiple envelopes. Previously, you could only select one document for an eSignature envelope. Read more
    - **Holding area history follows the document** – After a document is processed from the Holding area, the document history from the Holding area now shows for the document in the Document register.
    - **Last Received Transmittal columns added to Document registers** – New columns have been added to the Document register, so you can easily view last received transmittal information and details. Read more.
    - **Viewer autosave function** – You can now specify whether the PDF viewer automatically saves annotations as they are added to a document, so you do not have to save it manually. Read more
    - **Filter on data in linked items** – You can now filter annotations based on the data of linked items, such as mail, transmittals or forms. The Module column has been added to the File and sort panel for annotations in the PDF viewer, so you can select the module to use as a filter.
    - **Manage columns on the Comments tab** – You can now manage the columns in the Comments tab of a document, so you can select the columns shown and their order. Read more
    - **Close out comments in bulk –** Review coordinators can now mark all review comments as closed out with a single check box. Previously, you had to mark each comment as closed out. Read more
    - **Roles in reviews and workflows –** You can now delegate a review to a role instead of to an individual user to give you more flexibility when delegating reviews. You can also remove or replace roles when managing workflow. Read more
    - **Copy and paste markups –** You can now use the Ctrl-C and Ctrl-V keyboard shortcuts to copy and paste a markup. Copy and paste is supported in the same file or across files.
- **Administration**
    - **Communication matrix for checklists** – The Checklist module is now included in the communication matrix. You can use the communication matrix to control to which companies a specified company can send checklists.

- **Role history** – The Edit role dialog box now includes a history tab, so you can see changes made to a role that include when the role was added or deleted and edits to the role. Only events after the date of upgrade are shown in the History tab. Read more

- **Project Administration information from API** – You can now collect the project administrator information from project settings through a call to the Admin API. Previously, the only way to get this information was by entering it in the Project settings > **Miscellaneous** tab. For information about using API calls, contact your InEight representative.

- **Forms**
  - **Lot number on Forms register** – The Lot number column has been added to the Forms register, so youType equation here. can filter the register and see associated lot numbers. The Lot number field is populated automatically.
  - **Navigation assistance when opening forms** – Document now provides navigation assistance when opening forms by going directly to the current step where applicable. This assistance is only applicable when the form is a workflow form or in non-workflow forms when the user opening the form is defined only for a specific step.
- **Checklists**
  - **Dependent fields** – The Checklist builder now supports dependent fields.
  - **Hide duplicate items** – When there are multiple recipients for a checklist, you can now hide duplicates so only one instance shows in the Checklists register. Read more
  - **Create a mail item from a checklist** – The System Action response type in the Checklist builder has been updated to let you add a mail item from a checklist. Previously, you could only add forms as the System Action response type. Read more
  - **Lot number on Checklists register** – The Lot number column has been added to the Checklists register, so you can filter the register and see associated lot numbers. The Lot number field is populated automatically.
- **Gallery**
  - **Generate a hyperlink from the Gallery register** – You can now generate a document hyperlink for a gallery item to send to another user. The link takes the recipient directly to the gallery item. Read more
- **Reports**
  - **Annotation text in Comment reports** – Actual text from annotations now show in comment reports. Previously the reports referred you to the PDF.

Mobile Release Notes

- **Checklists**
    - **Mark up photo attachments** – You can now use the mobile app to mark up photos that are uploaded as attachments to a checklist. Simple markup tools have been added to the Details page for the attached photo. The markup tools let you add text and draw lines or shapes.

Documents

Send multiple documents for eSignature in a single envelope

Now, you can select multiple documents from the Documents register, and then select Actions > **Send for signature**. After receiving the envelope, the signees can sign each document.

History documents are created as new documents for each document in the envelope.

Last Received Transmittal columns added to Document register

The following columns are available in the column manager:

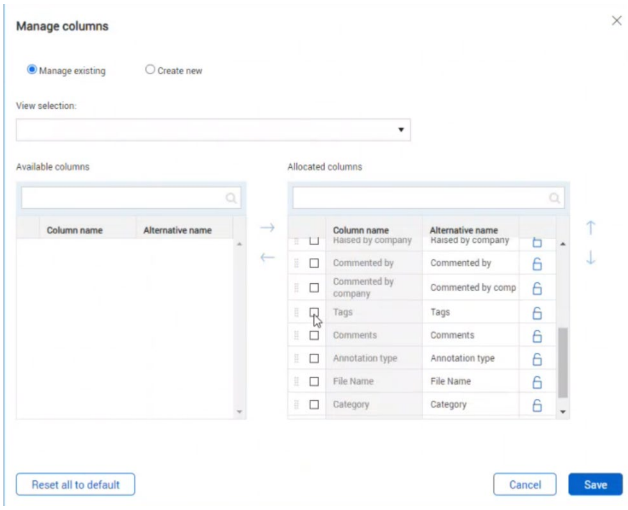
Last Received Transmittal No
Last Received Transmittal Reason
Last Received Transmittal Respond By Message
Last Received Transmittal Respond by Date
Last Received Transmittal Sender
Last Received Transmittal Sender Company
Last Received Transmittal Subject
Latest Transmittal No

Viewer autosave function

The new project setting, Settings > Project settings > Document > Comment > **Automatically save document markups** lets you specify whether annotations are automatically saved when using the PDF viewer.

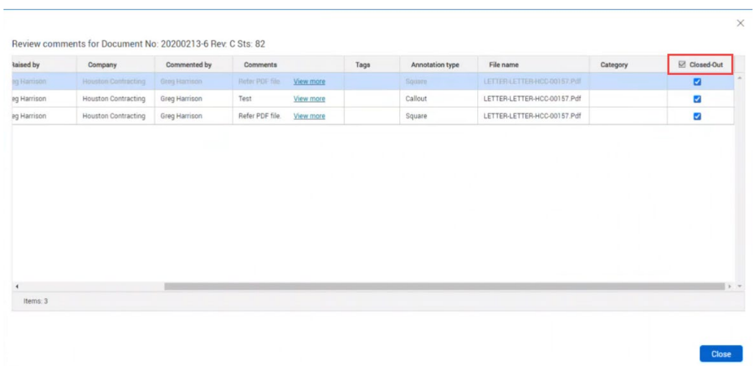
Manage columns on the Comments tab

To manage columns on the documents tab, expand the **Actions** menu, select **Views**, and then select **Manage columns**. The Manage columns dialog box opens, where you can manage the columns for an existing Comments tab view or create a new view.



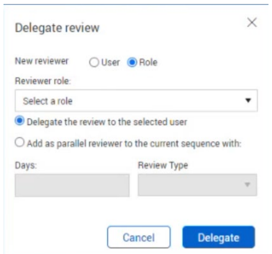
Close out comments in bulk

In the Review comments dialog box accessed from the Release page, a check box has been added to the Closed Out column header. You can select the check box to mark all comments.

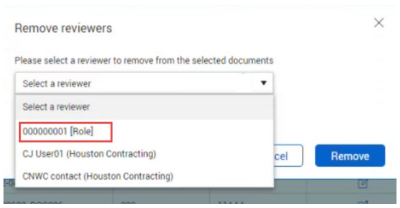


Roles in reviews and workflow

The Roles option has been added to the Delegate review dialog box. When you select the Roles option, you can then select the applicable role.



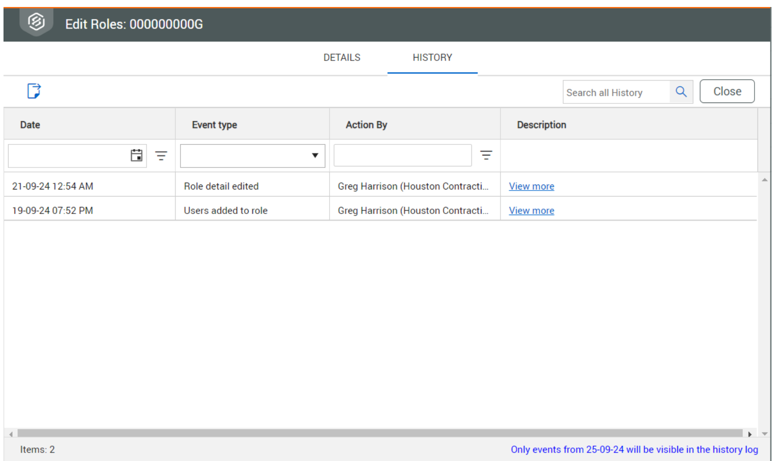
When you manage workflows from the Manage workflows register, roles now show in the selection list for removing or replacing reviewers.



Administration

Role history

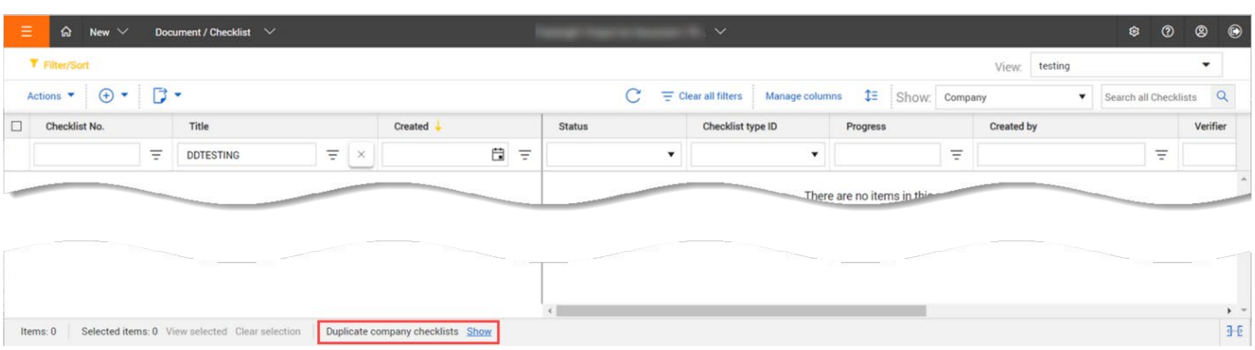
The History tab shows the date, event type, the name of the person who made the change, and a link to additional details.



Checklists

Hide duplicate items

The Show/Hide Duplicate company checklists button has been added to the bottom of the Checklists register when you are in the Company view. Click the button to switch between showing and hiding the duplicates.



Create a mail item from a checklist

When the mail action response type is used, the checklist user can select the mail type from a drop-down list to complete the checklist.

Gallery

Generate a document hyperlink from the Gallery register

The option Generate gallery hyperlink has been added to the Actions menu on the Gallery register. To create a hyperlink, select a gallery image, and then go to Actions > **Generate gallery hyperlink**. A dialog box that contains the hyperlink opens.