Document 19.7

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	10-JUL-2019	Initial publication

Contents

Release summary

This release of Document adds review team roles and enhanced login authentication, in addition to other improvements to security, review and onboarding.

New features summary

- **Role-based security for Document review teams** – Roles let project teams update users in one location and have updates mirrored in the appropriate areas automatically. With constant turnover in project personnel, it becomes cumbersome to add and remove users in the assigned workflows and review teams. This feature removes a large amount of overhead to execute and maintain accurately. Read more.

- **Two Factor Authentication** – This feature lets you leverage Document to provide two factor authentication for user logins, which is critical to provide secure access to the product. Read more.

Improvements summary

- **Define fields for change document details –** This enhancement lets you define the fields that reviewers can modify using the Change document details function, enabling your team to add or correct information in a Document while they're thinking about it, ensuring more accurate information. In most cases, your team does not want project users to be able to modify all information related to a document, but it's sometimes advantageous to allow the editing of fields when relevant to an individual's job function. Read more.

- **Bulk Forward Transmittals** – You can identify and forward Transmittals in bulk to streamline the onboarding process. Currently, Transmittals can only be forwarded individually, which can be time consuming when required to provide access to new personnel on a project. Read more.

- **Forms comment security –** You can control comment security at a more detailed level, so team members can make internal comments that are not included in the final version while completing the review process on Project Forms. Read more.

- **Add contacts to Security Groups in bulk –** You can add users to security groups in bulk directly from the Contacts screen. This improvement helps streamline the process of managing security for a project, which can be time consuming for administrators. Read more.

- **Training Resources library** – Document user guides and previous release notes are available from the Help drop-down menu. Read more.

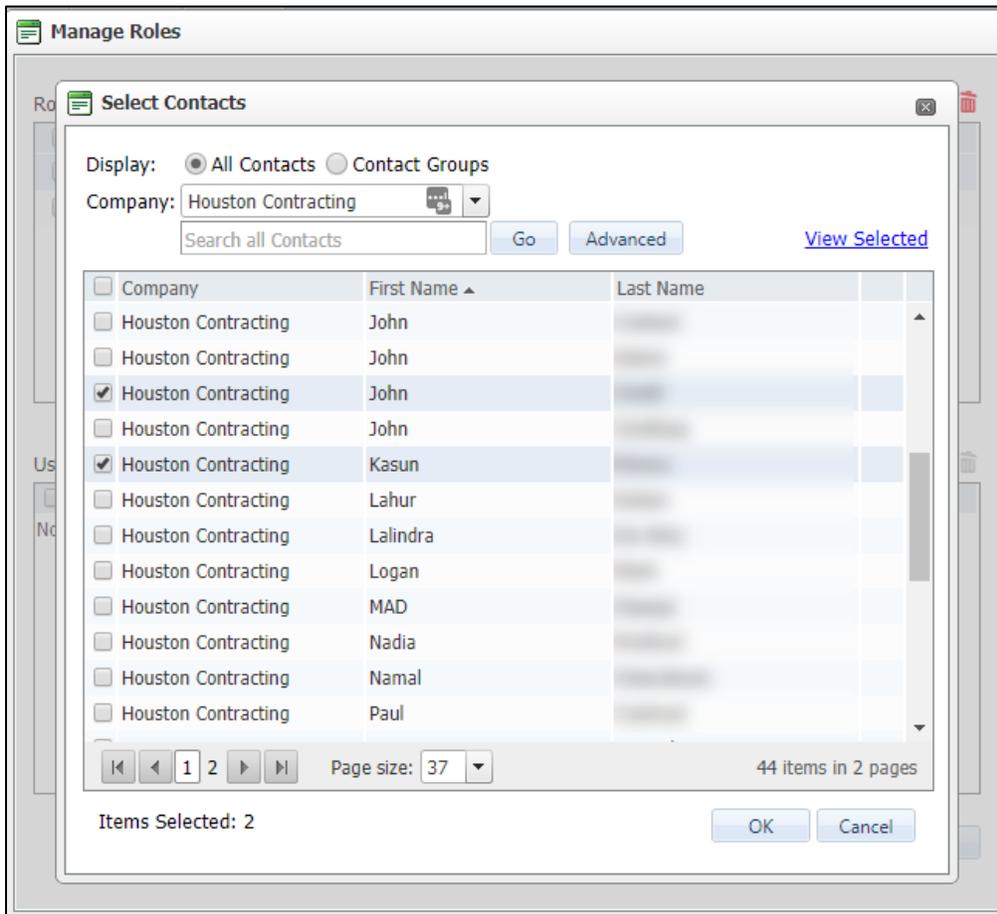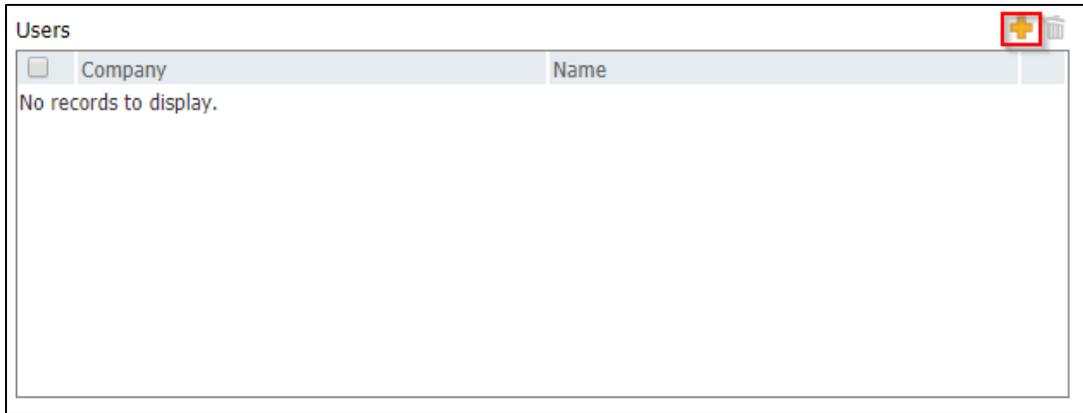# Role-based security for Document review teams

You can find **Roles** in the Contacts screen, under the **More** drop-down menu.
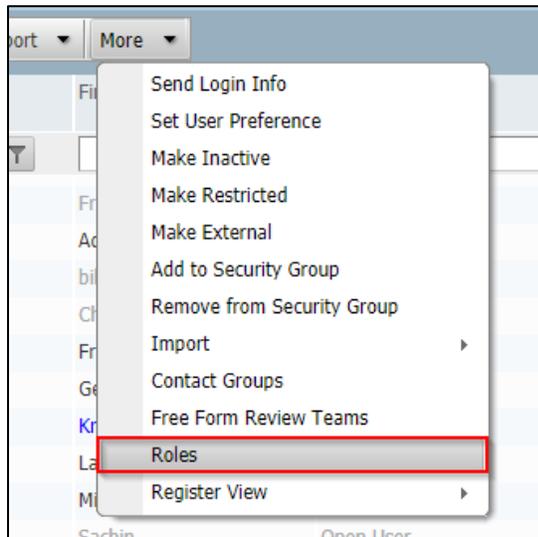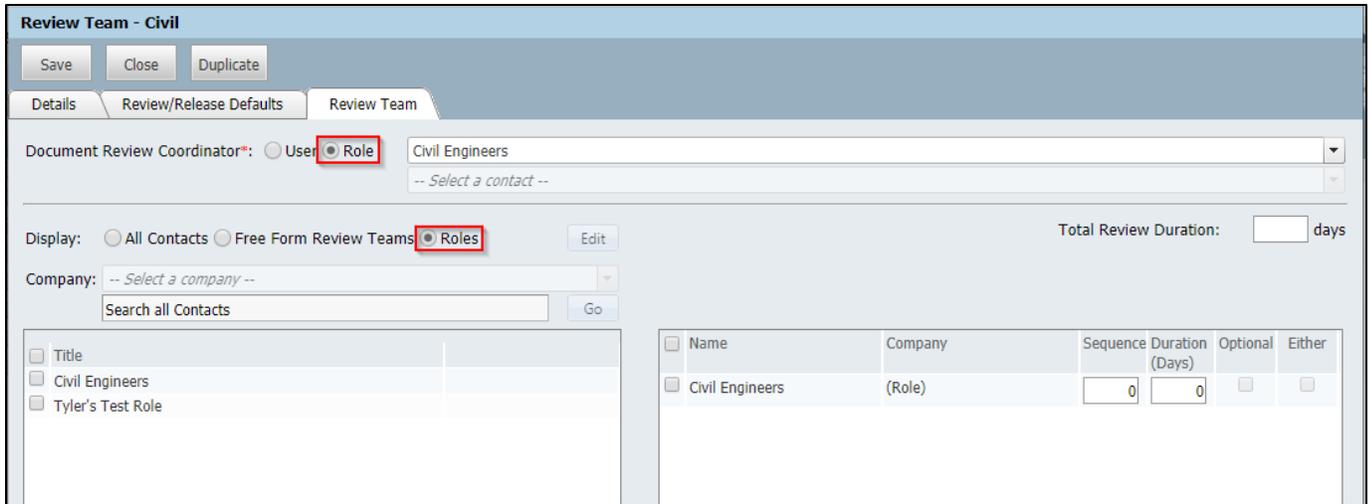

Use the **Roles** pane to add or delete roles.
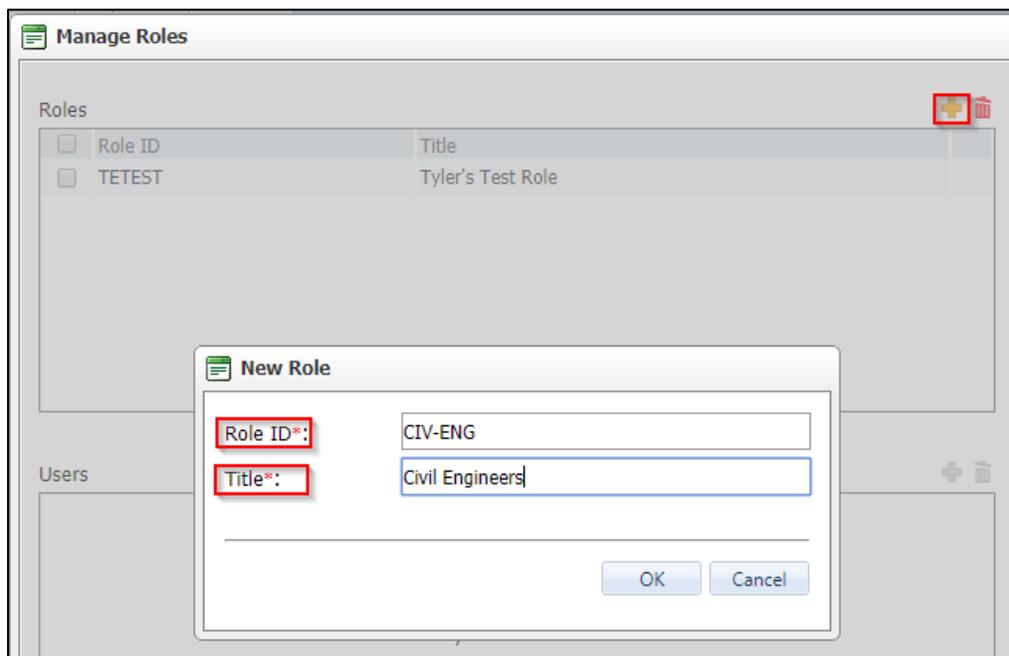
Use the **Users** pane to select the company and users to be added to a role.

From the Review Team rule in the **Review Team** tab, there is an additional option for **Roles** for both the Review Coordinator and Reviewers.
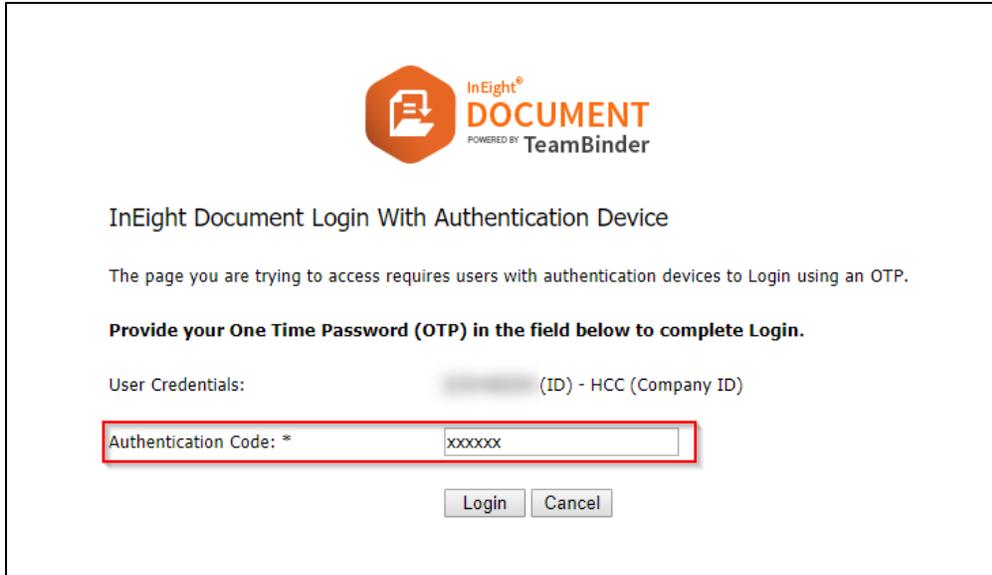
Two Factor Authentication

You can enable **Two Factor Authentication** from the **Settings** menu.

To scan the QR Code and set up your Document account, use the Microsoft Authenticator app.

When you next log in to Document, after entering your standard credentials, you must enter your code from Microsoft Authenticator in the two factor screen.
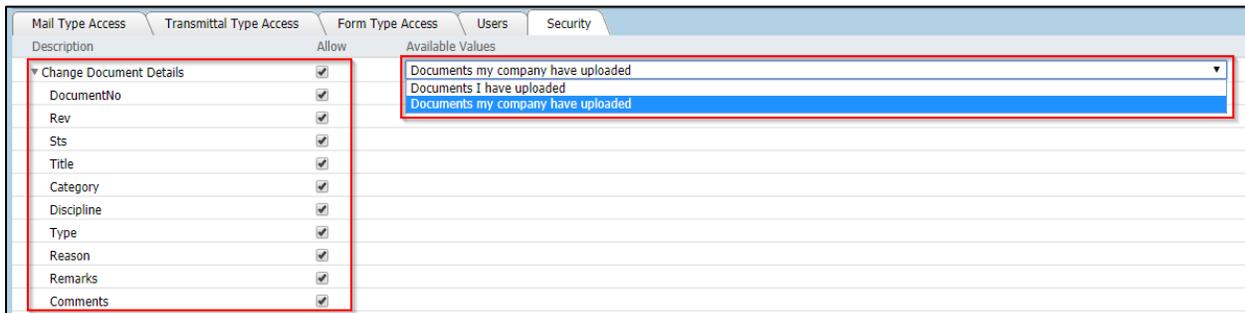
Define fields for change document details

You can define Change Document Details in the **Security** tab by selecting **Document** in the Module drop-down menu.

You can select fields that can be updated by security group users under **Change Document Details** and can select for which documents in the drop-down menu.
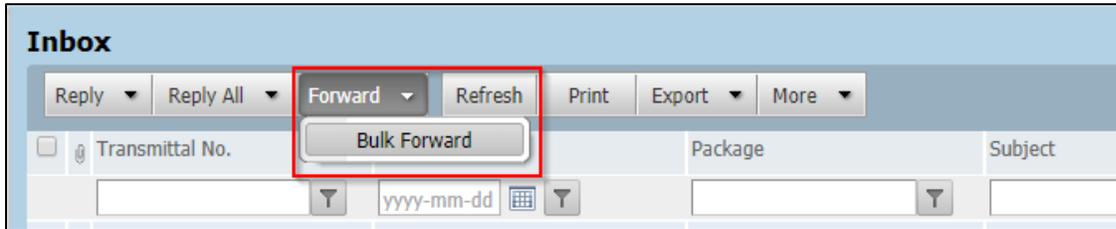

| NOTE:	The options only contain standard Document fields. Custom fields can be added upon request.

Bulk Forward Transmittals

The **Bulk Forward** option is located on the Transmittal Register under the **Forward** drop-down menu.

| NOTE:	To Bulk Forward the Transmittals, they must be the same type

Form comment security

Comment security options are in the **Comment accessible by** section. If applicable, you can also select users from the **Send Form Comments to** section.
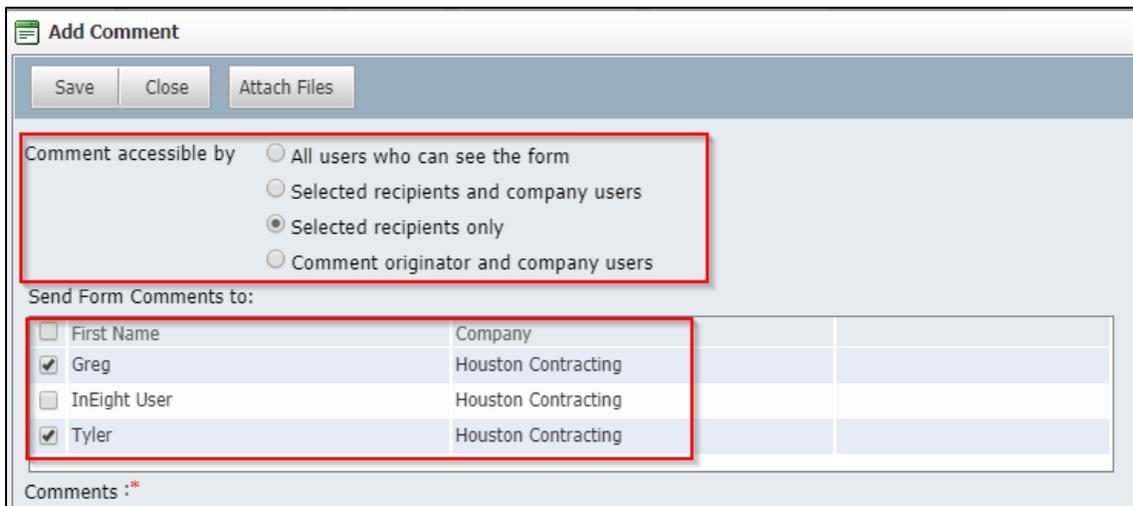
NOTE:	The comment originator and users from their company will always be able to view the comment.

Add contacts to Security Groups in bulk

You can find the **Add to Security Group** option on the Contacts screen in the **More** drop-down menu**.**
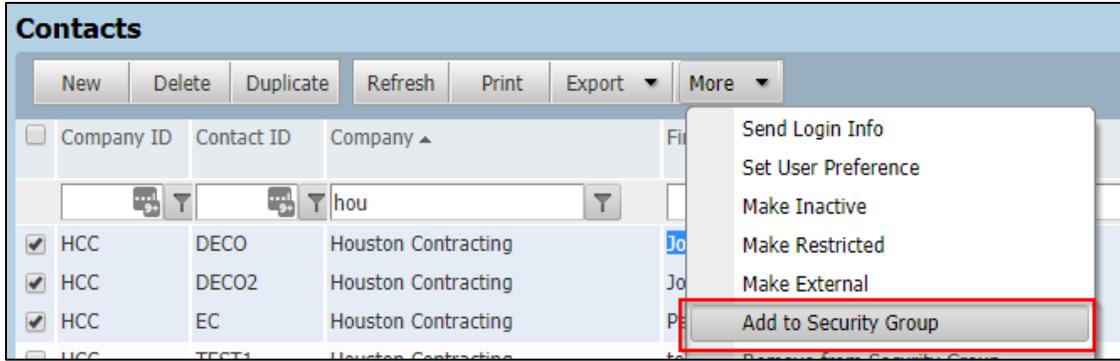
Training Resources library

You can find the **Training Resources** library under the **Help** drop-down menu.