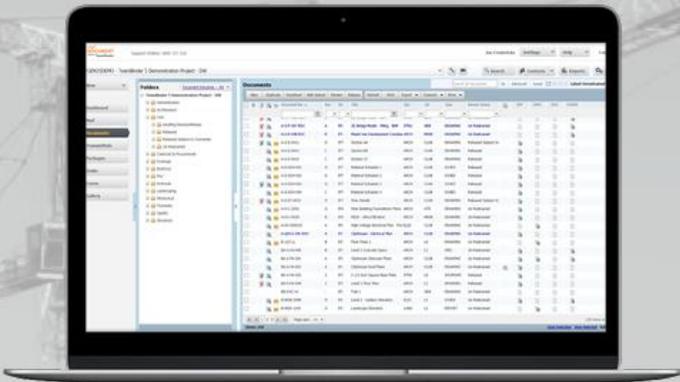


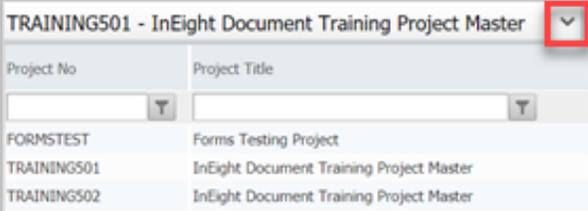
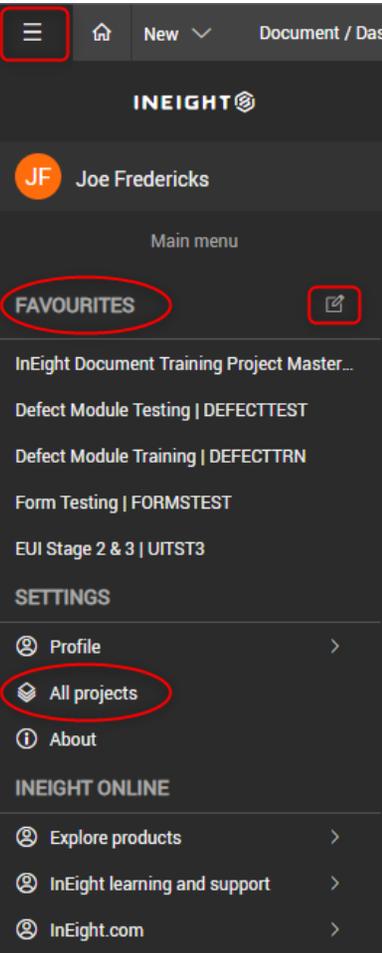
# INEIGHT DOCUMENT

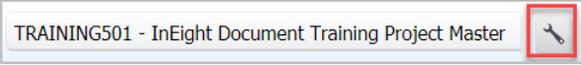
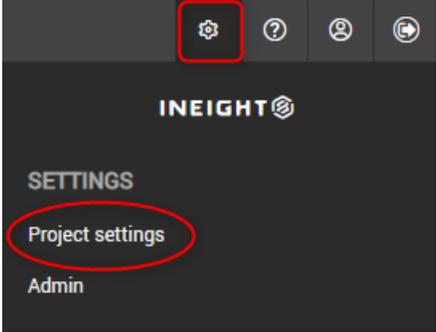
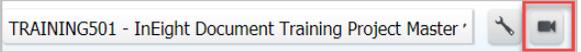
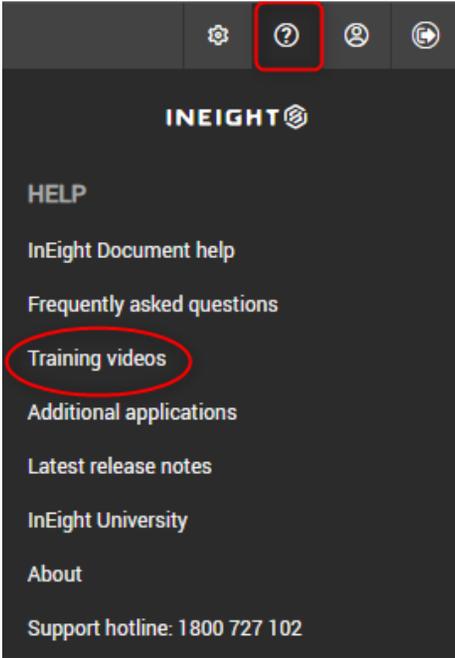
## Classic vs. Enhanced User Interface

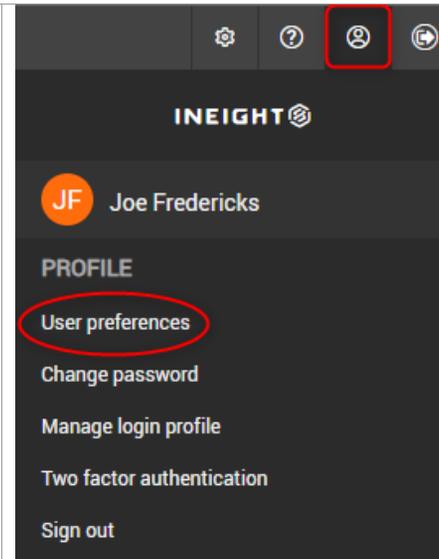
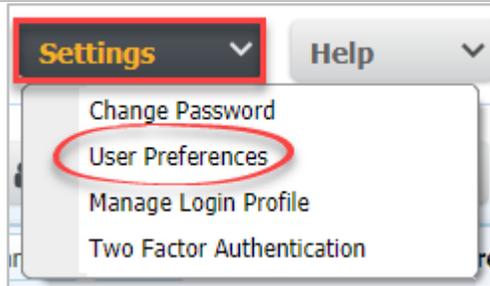


InEight<sup>®</sup>  
**DOCUMENT**  
POWERED BY **TeamBinder**

# 1. Dashboard

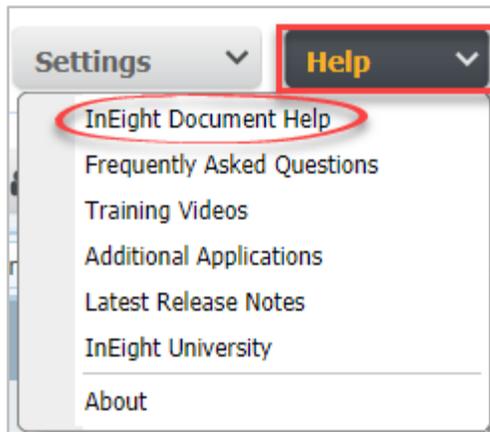
Icon / Function	Classic UI	New UI
<p><b>Change Project</b></p>	<p>Click the <b>arrow</b> next to the project name and select a project from the drop-down menu.</p> 	<p>Click the <b>“Hamburger” button</b> top left of screen and choose <b>“All Projects”</b> or edit button next to <b>“FAVOURITES”</b> to add Favourite Projects</p> 
<p><b>Project Settings</b></p>	<p>Click the <b>Settings icon</b> next to the project name to open the Project settings window.</p>	<p>Click the <b>Gear icon</b> in the top-right corner of the screen and select <b>Project settings</b>.</p>

		
<p><b>Training Videos</b></p>	<p>Click the <b>Video icon</b> next to the project name to access training videos.</p> 	<p>Click the <b>Help icon</b> in the top-right corner of the screen and select <b>Training videos</b>.</p> 
<p><b>User Preferences</b></p>	<p>Click <b>Settings</b> in the top-right corner of the screen and select <b>User Preferences</b>.</p>	<p>Click the <b>Profile icon</b> in the top-right corner of the screen and select <b>User Preferences</b>.</p>

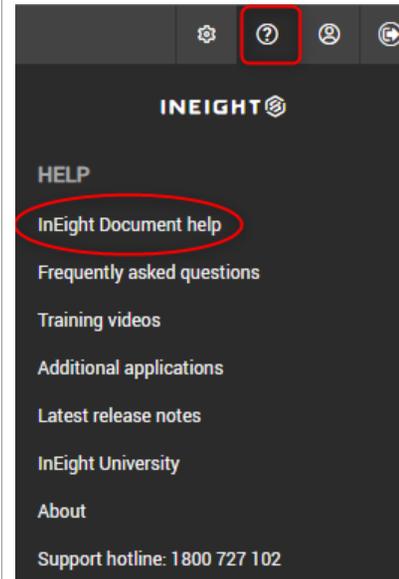


## Help

Click **Help** in the top-right corner of the screen and select **InEight Document Help**.



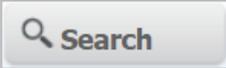
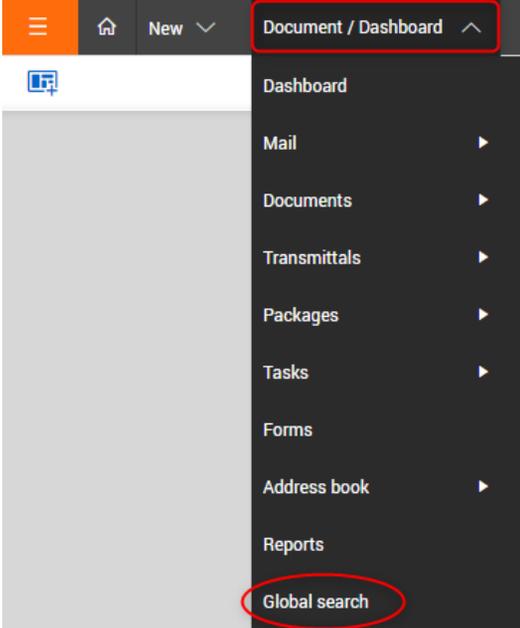
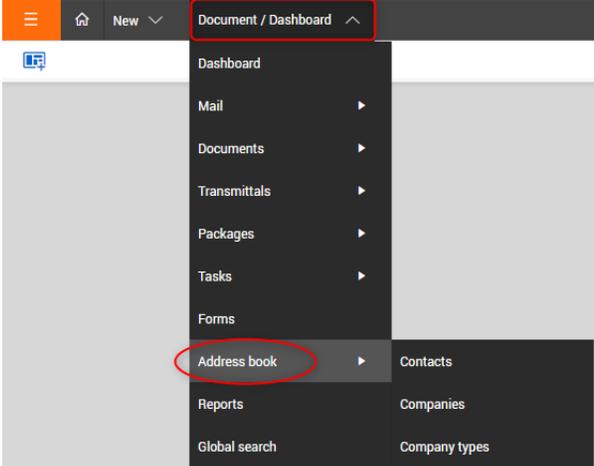
Click the **Help icon** in the top-right corner of the screen and select **InEight Document help**.

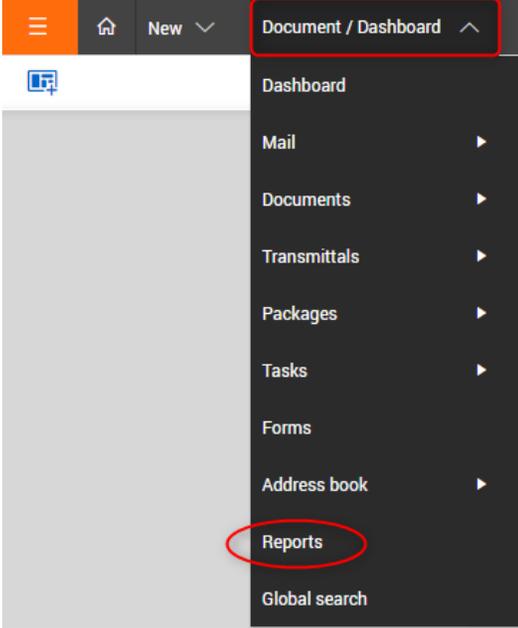
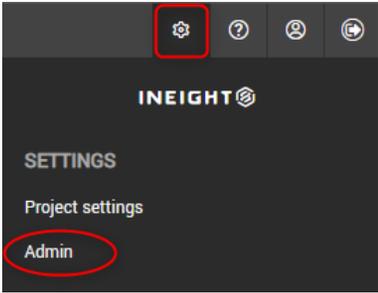


## Global Search

Click **Search** in the top-right corner of the screen.

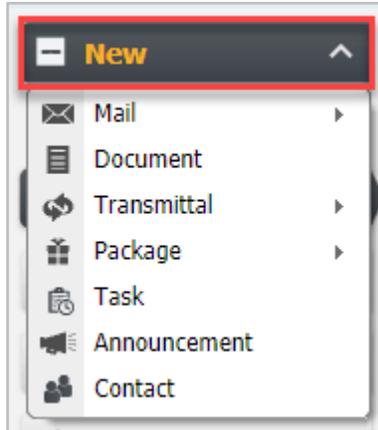
Click the **Magnifying glass icon** in the top-right corner of the screen.

		
<p><b>Address Book / Company Types</b></p>	<p>Click <b>Contacts</b> in the top-right corner of the screen.</p> 	<p>Click the <b>Address book</b> icon in the top-right corner of the screen.</p> 
<p><b>Reports</b></p>	<p>Click <b>Reports</b> in the top-right corner of the screen.</p> 	<p>Click the <b>Reports</b> icon in the top-right corner of the screen.</p>

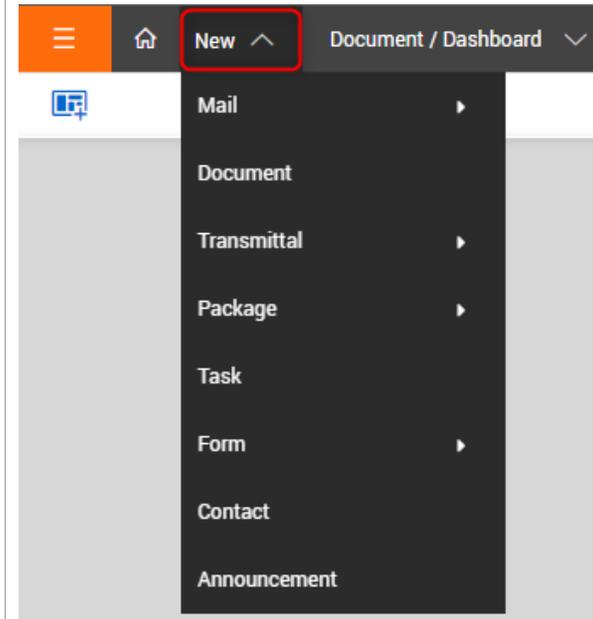
		
<b>Admin</b>	Click <b>Admin</b> in the top-right corner of the screen. 	Click the <b>Gear icon</b> in the top-right corner of the screen and select <b>Admin</b> . 

## New Item

Click New and select the item type from the drop-down menu.

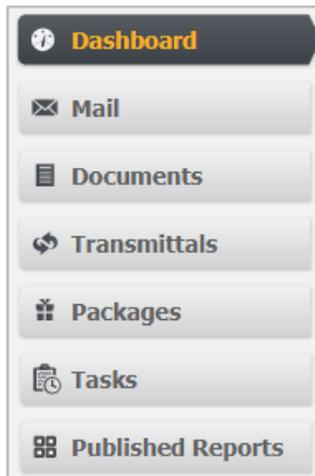


Click New and select the item type from the drop-down menu.

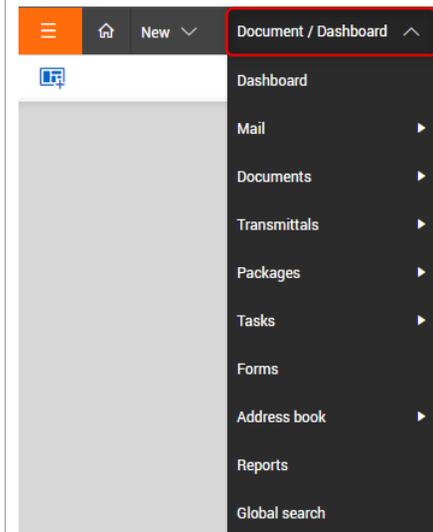


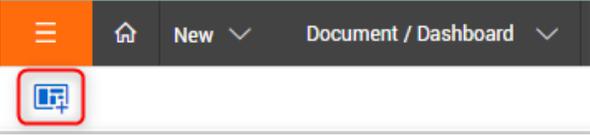
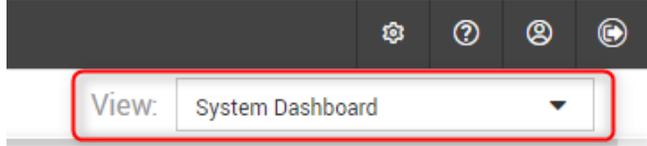
## Module Selection

Use the drop-down menu on the left side to select a module.

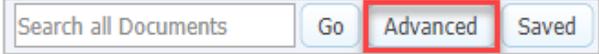
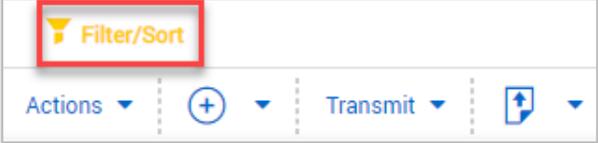
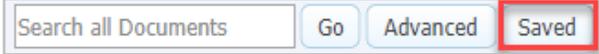
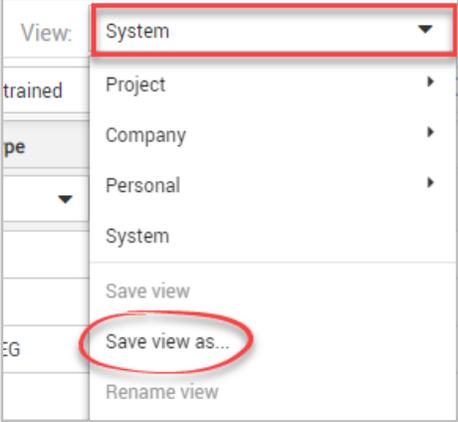
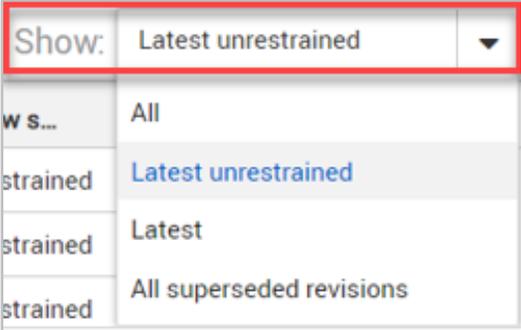


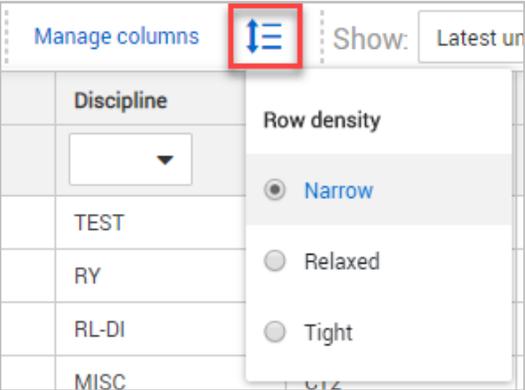
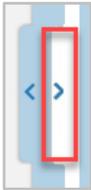
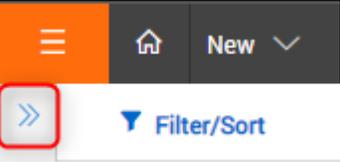
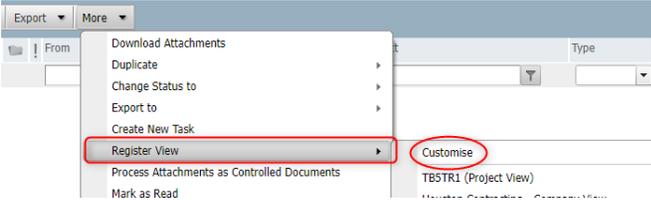
In the top-left corner of the screen, the current module is displayed. Click the current module to select another from a drop-down menu.

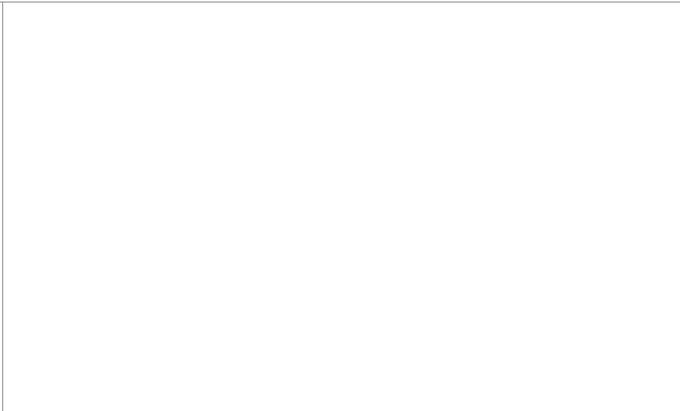
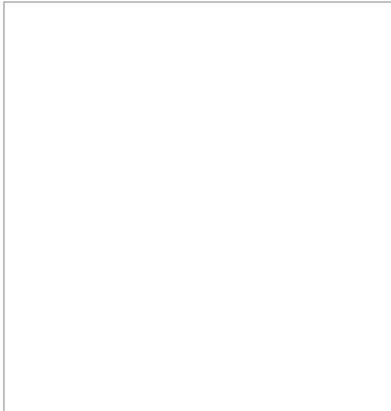


<p><b>Add Dashboard Tile</b></p>	<p>Not available in Classic.</p> <p>By default all widgets are displayed made available. It can be collapsed but not hidden.</p>	<p>In the top-left corner of the screen, click the icon to add Dashboard tile.</p> 
<p><b>Change / Create Dashboard view</b></p>	<p>Not available in Classic.</p>	<p>In the top-right corner of the screen, click <b>View</b> dropdown to select Dashboard view. Select <b>new view</b> to create new view.</p> 
<p><b>Quick Links</b></p>	<p><i>Not available</i></p>	<p>There is now a drop-down menu on the main navigation bar for quick links.</p> 

## 2. Register Features

Icon / Function	Classic UI	New UI
<p><b>Advanced Search</b></p>	<p>Click <b>Advanced</b> next to the quick search field.</p> 	<p>Click <b>Filter/Sort</b> in the top-left corner.</p> 
<p><b>Saved Searches</b></p>	<p>Click <b>Saved</b> next to the quick search field.</p> 	<p>Saved searches are now called Views. To save a search, click the drop-down menu next to the <b>View</b> field and select <b>Save view as</b>.</p> 
<p><b>Register Filter</b></p>	<p>Click the square icons to choose how to filter documents.</p> 	<p>To choose how to filter documents, click the <b>Show</b> drop-down menu and select an option.</p> 

<p><b>Row Density</b></p>	<p>This feature is not available in the classic UI.</p>	<p>Click the <b>Manage columns</b> icon to select the row density of the Register.</p> 
<p><b>Folders</b></p>	<p>Click the <b>Arrow icon</b> to expand project folders.</p> 	<p>Click the <b>Arrow icon</b> in the top-left corner of the screen to expand project folders.</p> 
<p><b>Customise Register View</b></p>		<p>Click <b>Manage columns</b> to select that will be made available in the register.</p>  <ol style="list-style-type: none"> <li>1. Tick to select column to add in the register.</li> <li>2. Click the arrow to add/remove column.</li> <li>3. Click the padlock icon to lock the column.</li> <li>4. Click up/down arrows to arrange order of the columns.</li> </ol>



**Manage columns**

Available columns 1

Column name	Alternative name
<input checked="" type="checkbox"/> Area	
<input type="checkbox"/> Date received	
<input type="checkbox"/> Date recorded	
<input type="checkbox"/> Date released	
<input type="checkbox"/> Deliverable	
<input type="checkbox"/> DeliverableC	
<input type="checkbox"/> Disciplines	
<input type="checkbox"/> DocTypeC	

Selected columns 3

Column name	Alternative name
<input type="checkbox"/> Checked out	Checked out
<input type="checkbox"/> Comments	Comments
<input type="checkbox"/> View files	View files
<input type="checkbox"/> Filed in folder	Filed in folder
<input type="checkbox"/> Document No.	Document No.
<input type="checkbox"/> Rev	Rev
<input type="checkbox"/> Sts	Sts

Buttons: 2 (Left arrow), 4 (Up/Down arrows), 3 (Close), **Reset all to default**, **Cancel**, **Apply**

**Clear Filter**

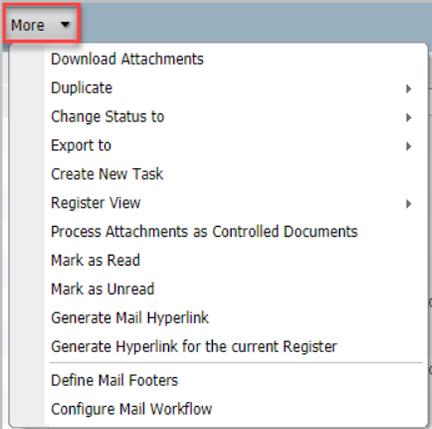
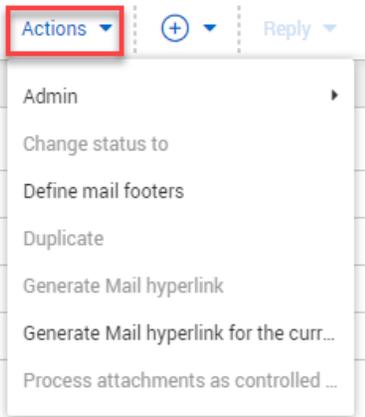
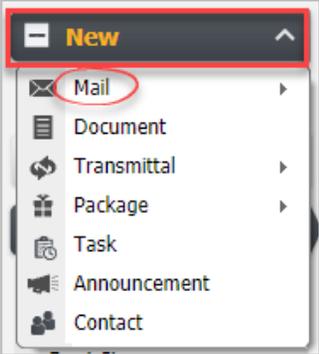
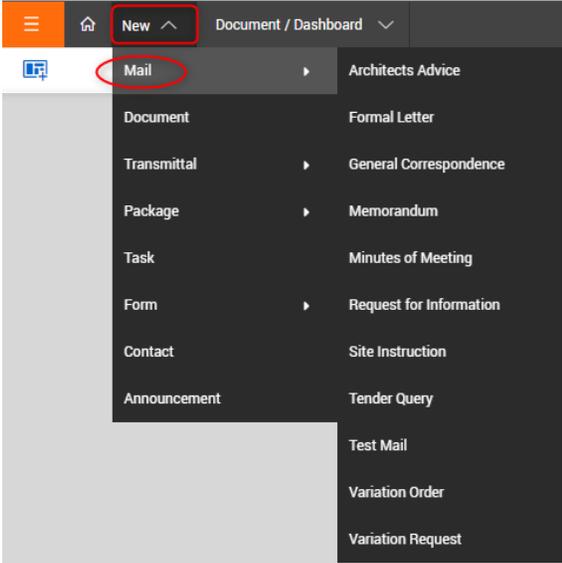
L1	SHOPDWG	Un-Restrained
object	MAN	Un-Restrained
acting L1	DRAWING	Un-Restrained

1709 items in 18 pages

[Clear Selection](#) [View Selected](#) **Selected: 0**

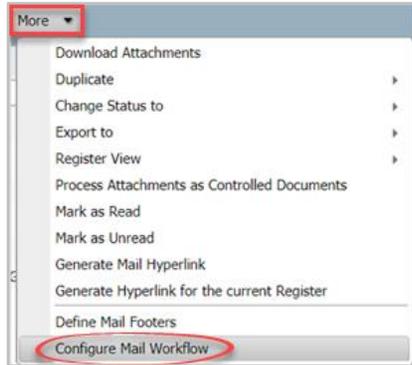
The Clear all filters button has been added to all registers. You can click this button to clear all filters that have been applied to the register to see all items.

### 3. Mail

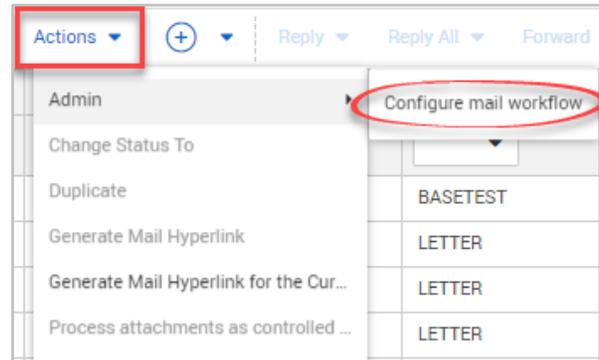
Icon / Function	Classic UI	New UI
<p><b>More Drop-Down Menu</b></p>	<p>Click <b>More</b> to select an option from the drop-down menu.</p> 	<p>Click <b>Actions</b> to select an option from the drop-down menu.</p> 
<p><b>New Mail Item</b></p>	<p>Click <b>New</b> and select <b>Mail</b>.</p> 	<p>In the top left corner of the screen, click <b>New</b> and select <b>Mail</b>.</p> 

### Configure Mail Workflow

Click **More** and select **Configure Mail Workflow**.

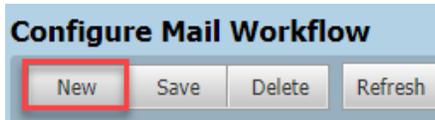


Click **Actions**. In the Admin tab, select **Configure mail workflow**.



### Create New Mail Type

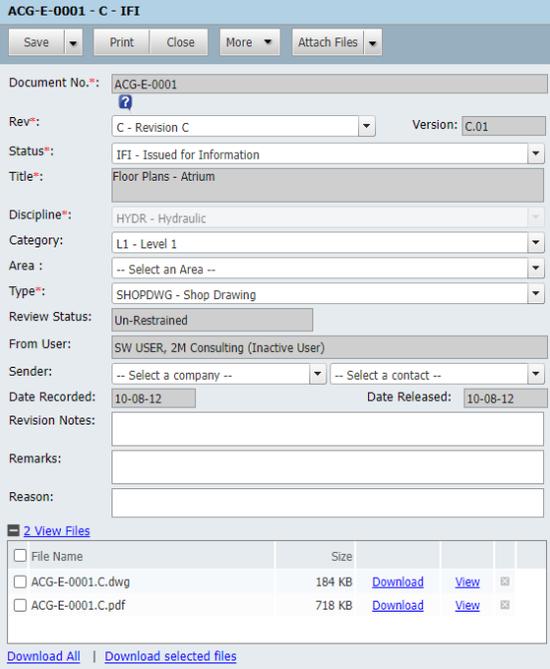
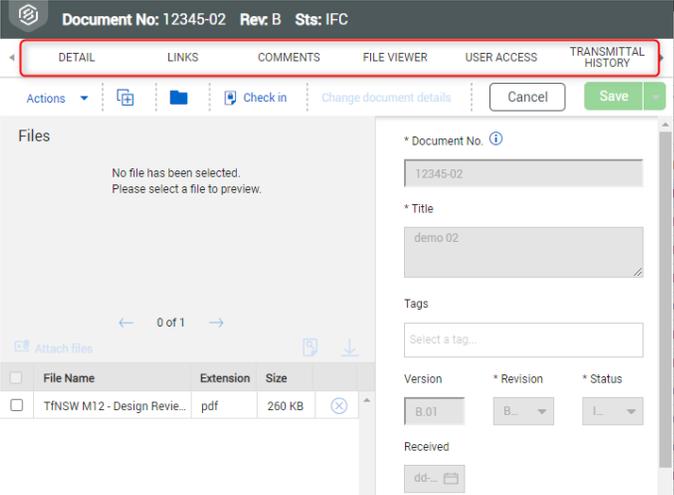
In the Configure Mail Workflow window, click **New**.

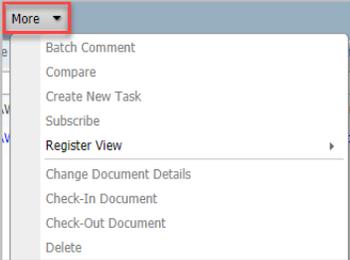
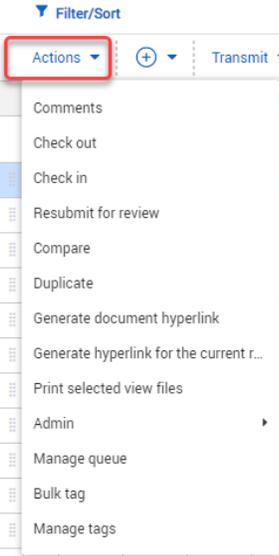


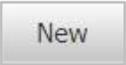
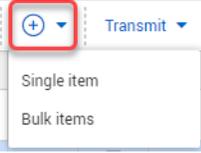
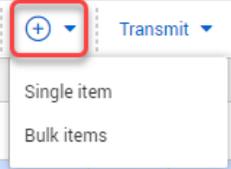
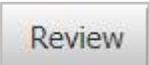
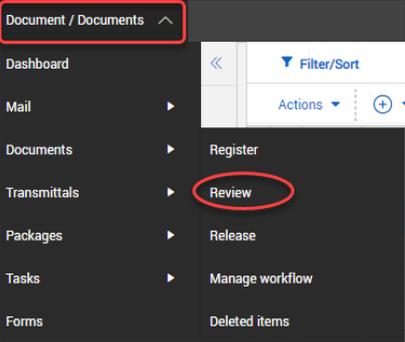
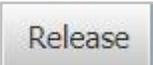
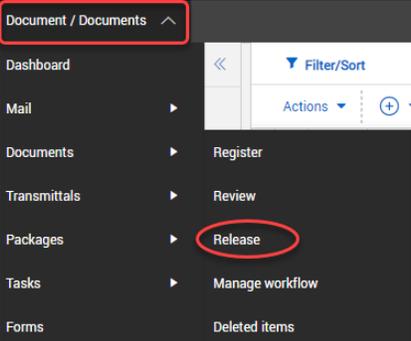
In the Configure Mail Workflow window, click the **plus (+)** icon.



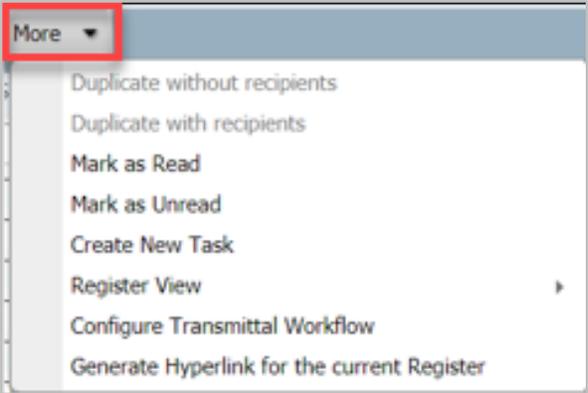
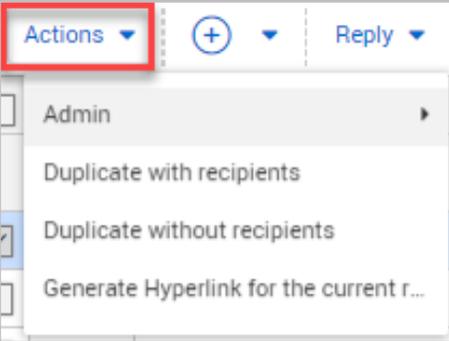
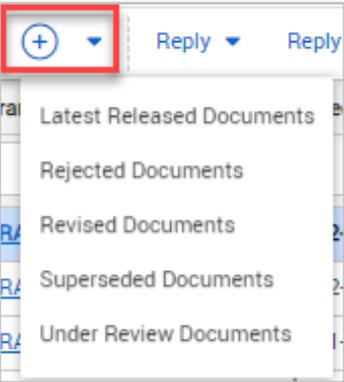
## 4. Document

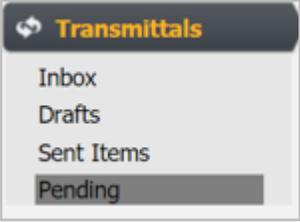
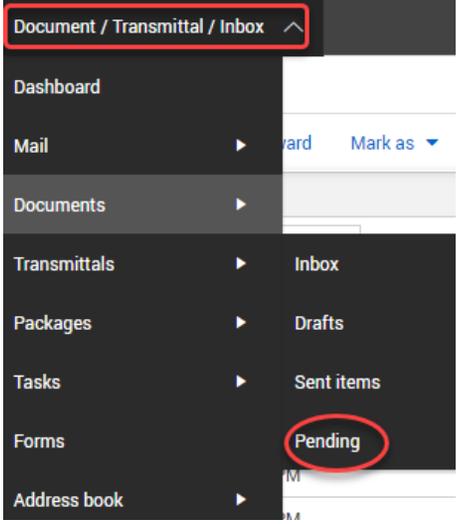
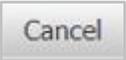
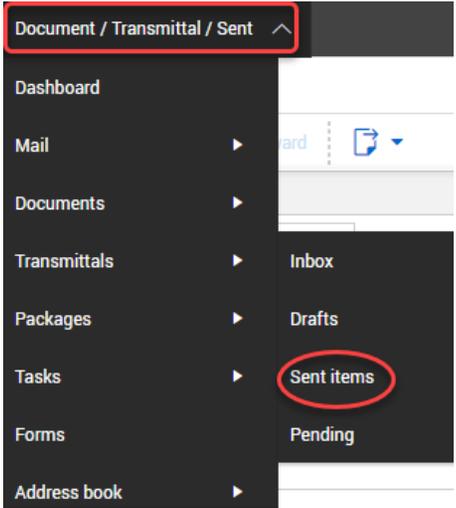
Icon / Function	Classic UI	New UI															
<b>Open Document Details</b>	<p>Double click on a document to open the document details.</p> 	<p>Click on the <b>Document Number</b> to open the document details.</p> 															
<b>Document Details Screen</b>	 <table border="1" data-bbox="506 1019 1056 1122"> <thead> <tr> <th>File Name</th> <th>Size</th> <th>Download</th> <th>View</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> ACG-E-0001.C.dwg</td> <td>184 KB</td> <td><a href="#">Download</a></td> <td><a href="#">View</a></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> ACG-E-0001.C.pdf</td> <td>718 KB</td> <td><a href="#">Download</a></td> <td><a href="#">View</a></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	File Name	Size	Download	View		<input type="checkbox"/> ACG-E-0001.C.dwg	184 KB	<a href="#">Download</a>	<a href="#">View</a>	<input type="checkbox"/>	<input type="checkbox"/> ACG-E-0001.C.pdf	718 KB	<a href="#">Download</a>	<a href="#">View</a>	<input type="checkbox"/>	<p>Within the Document details screen, different tabs are available on top of the screen such as:</p> <ul style="list-style-type: none"> <li>• <b>Links</b> – view a summary of links in a document.</li> <li>• <b>Comments</b> – displays the comments register where you can view/ add new comment to the document.</li> <li>• <b>File Viewer</b> – view document online via File Viewer</li> <li>• <b>User Access</b> – view user access to a document from within the document. (<i>Admin function only</i>)</li> <li>• <b>Transmittal History</b> - view document history from within the document.</li> <li>• <b>Review Status</b> - view document review status from within the document.</li> </ul> 
File Name	Size	Download	View														
<input type="checkbox"/> ACG-E-0001.C.dwg	184 KB	<a href="#">Download</a>	<a href="#">View</a>	<input type="checkbox"/>													
<input type="checkbox"/> ACG-E-0001.C.pdf	718 KB	<a href="#">Download</a>	<a href="#">View</a>	<input type="checkbox"/>													

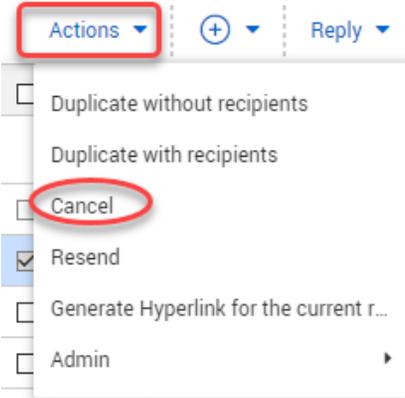
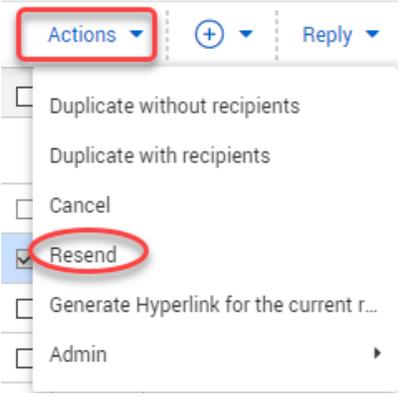
<p><b>File Viewer</b></p>	<p>Click the <b>File Viewer icon</b>.</p> 	<p>Click the <b>File Viewer icon</b> (updated icon).</p>  <p>The PDF viewer has a new look and feel along with improved markup and linking capabilities. Features include panes to search file text, view and manage comments, and view links. New linking functionality lets you drop a pin directly on the file to link to an existing item or create a new item from within the file. Annotations are now captured as standard comments against the document</p>
<p><b>More Drop Down</b></p>	<p>Select a document and click <b>More</b> to select an option from the drop-down menu.</p> 	<p>Select a document and click <b>Actions</b> to select an option from the drop-down menu.</p> 

<p><b>New Document</b></p>	<p><b>Click New.</b></p> 	<p><b>Click the plus (+) icon and select Single Item.</b></p> 
<p><b>Bulk Upload</b></p>	<p><b>Click Bulk Upload.</b></p> 	<p><b>Click the plus (+) icon and select Bulk Items.</b></p> 
<p><b>Documents for Review</b></p>	<p><b>Click Review.</b></p> 	<p><b>Click the Module menu. In the Documents tab, select Review.</b></p> 
<p><b>Documents for Release</b></p>	<p><b>Click Release.</b></p> 	<p><b>Click the Module menu. In the Documents tab, select Release.</b></p> 

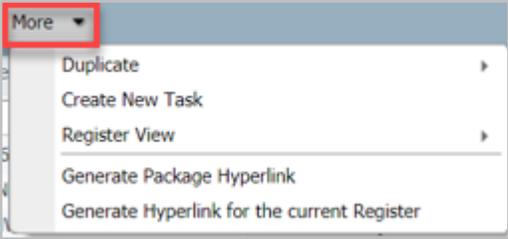
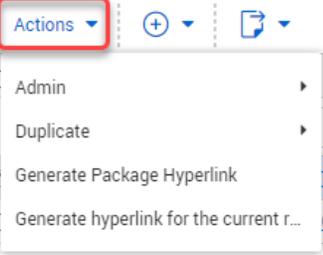
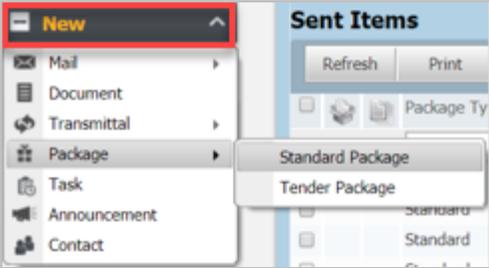
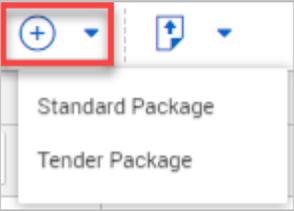
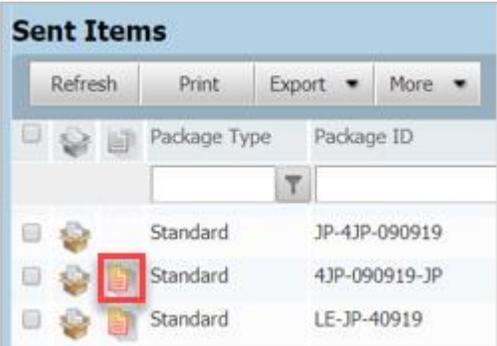
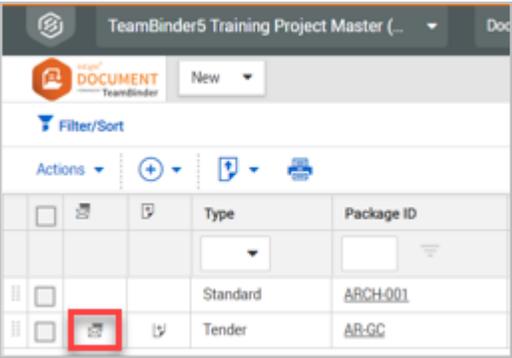
## 5. Transmittals

Icon / Function	Classic UI	New UI
<p><b>More Drop-Down Menu</b></p>	<p>Select a document then click <b>More</b> to select an option from the drop-down menu.</p> 	<p>Select a document and click <b>Actions</b> to select an option from the drop-down menu.</p> 
<p><b>New Transmittal</b></p>	<p>Click <b>New</b>.</p> 	<p>Click the <b>plus icon</b> and select an option from the drop-down menu.</p> 
<p><b>Pending Transmittals</b></p>	<p>On the Transmittals drop-down menu, click <b>Pending</b>.</p>	<p>Click the Module drop-down menu. In the Transmittals tab, select <b>Pending</b>.</p>

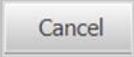
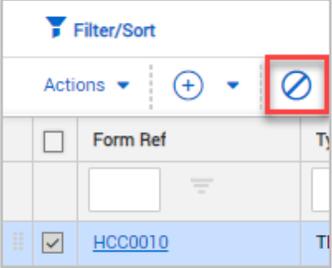
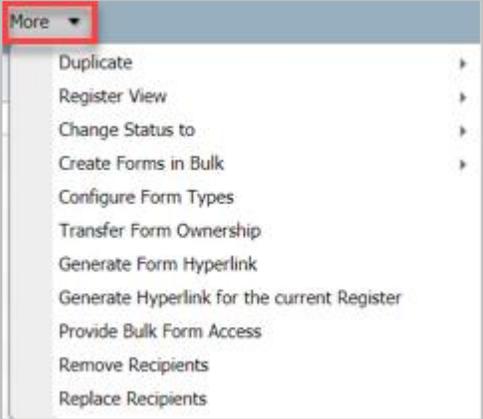
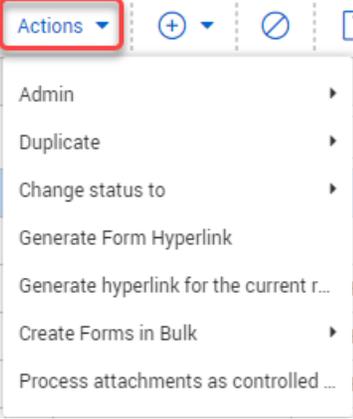
	 <p>A screenshot of a software interface showing a menu titled "Transmittals" with a back arrow icon. The menu items are "Inbox", "Drafts", "Sent Items", and "Pending". The "Pending" item is highlighted with a dark grey background.</p>	 <p>A screenshot of a software interface showing a dropdown menu titled "Document / Transmittal / Inbox". The menu items are "Dashboard", "Mail", "Documents", "Transmittals", "Packages", "Tasks", "Forms", and "Address book". The "Transmittals" item is expanded, showing sub-items: "Inbox", "Drafts", "Sent items", and "Pending". The "Pending" sub-item is circled in red.</p>
<p><b>Cancel Transmittal</b></p>	<p>Click <b>Cancel</b>.</p>  <p>A screenshot of a single button labeled "Cancel".</p>	<p>Click the <b>Module</b> drop-down menu. In the Transmittals tab, select <b>Sent Items</b>.</p>  <p>A screenshot of a software interface showing a dropdown menu titled "Document / Transmittal / Sent". The menu items are "Dashboard", "Mail", "Documents", "Transmittals", "Packages", "Tasks", "Forms", and "Address book". The "Transmittals" item is expanded, showing sub-items: "Inbox", "Drafts", "Sent items", and "Pending". The "Sent items" sub-item is circled in red.</p> <p>From the Sent Items Register, click <b>Actions</b> and select <b>Cancel</b>.</p>

		 <p>A screenshot of a software interface showing a dropdown menu. The 'Actions' button is highlighted with a red box. The menu items are: Duplicate without recipients, Duplicate with recipients, Cancel (circled in red), Resend (checked), Generate Hyperlink for the current r..., and Admin.</p>
<b>Resend Transmittal</b>	Click <b>Resend</b> . 	From the Sent Items Register, click <b>Actions</b> and select <b>Resend</b> .  <p>A screenshot of a software interface showing a dropdown menu. The 'Actions' button is highlighted with a red box. The menu items are: Duplicate without recipients, Duplicate with recipients, Cancel, Resend (checked and circled in red), Generate Hyperlink for the current r..., and Admin.</p>

## 6. Packages

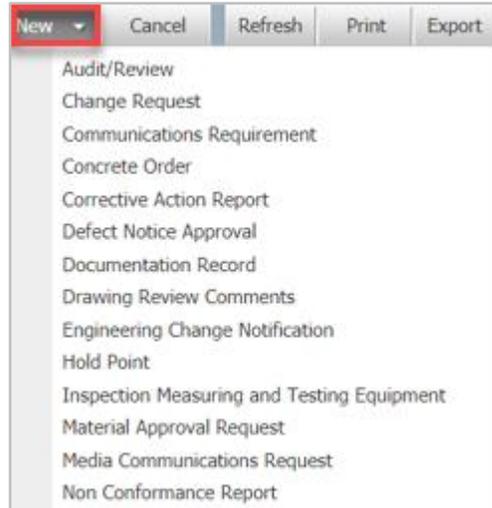
Icon / Function	Classic UI	New UI																																																						
<p><b>More Drop Down</b></p>	<p>Select a package and click <b>More</b> then select an option.</p> 	<p>Select a package and click <b>Actions</b> to select an option.</p> 																																																						
<p><b>New Package</b></p>	<p>Click <b>New</b>. In the Package tab, select an option.</p> 	<p>Click the <b>plus (+) icon</b> and select an option.</p> 																																																						
<p><b>Generate Addendum</b></p>	<p>Click the <b>notepad icon</b>.</p>  <table border="1" data-bbox="506 1084 1003 1430"> <thead> <tr> <th colspan="2">Sent Items</th> <th>Refresh</th> <th>Print</th> <th>Export</th> <th>More</th> </tr> <tr> <th>Package Type</th> <th>Package ID</th> <th colspan="4"></th> </tr> </thead> <tbody> <tr> <td>Standard</td> <td>JP-4JP-090919</td> <td colspan="4"></td> </tr> <tr> <td>Standard</td> <td>4JP-090919-JP</td> <td colspan="4"></td> </tr> <tr> <td>Standard</td> <td>LE-JP-40919</td> <td colspan="4"></td> </tr> </tbody> </table>	Sent Items		Refresh	Print	Export	More	Package Type	Package ID					Standard	JP-4JP-090919					Standard	4JP-090919-JP					Standard	LE-JP-40919					<p>Click the <b>envelope icon</b>.</p>  <table border="1" data-bbox="1184 1084 1696 1442"> <thead> <tr> <th colspan="2">TeamBinder5 Training Project Master (...)</th> <th>DOCUMENT</th> <th>New</th> </tr> <tr> <th colspan="4">Filter/Sort</th> </tr> <tr> <th>Actions</th> <th>+</th> <th>+</th> <th>+</th> </tr> <tr> <th>Type</th> <th>Package ID</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td>Standard</td> <td>ABCH001</td> <td colspan="2"></td> </tr> <tr> <td>Tender</td> <td>ABGC</td> <td colspan="2"></td> </tr> </tbody> </table>	TeamBinder5 Training Project Master (...)		DOCUMENT	New	Filter/Sort				Actions	+	+	+	Type	Package ID			Standard	ABCH001			Tender	ABGC		
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Type	Package ID																																																							
Standard	ABCH001																																																							
Tender	ABGC																																																							

## 7. Forms

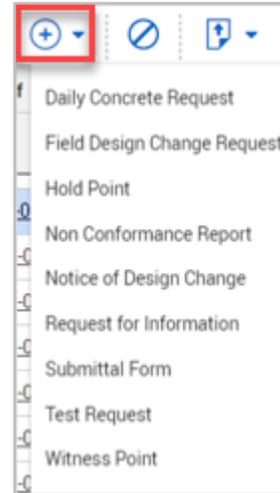
Icon / Function	Classic UI	New UI
<p><b>Cancel Form</b></p>	<p><b>Click Cancel.</b></p> 	<p><b>Select a form and press the Cancel icon.</b></p> 
<p><b>More Drop Down</b></p>	<p><b>Select a form and click More to select an option.</b></p> 	<p><b>Select a form and click Actions to select an option.</b></p> 

## New Form

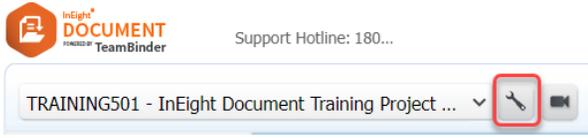
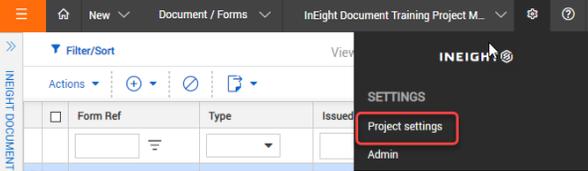
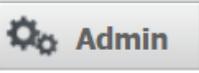
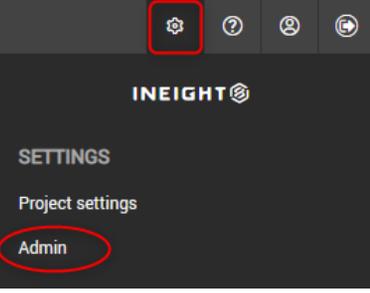
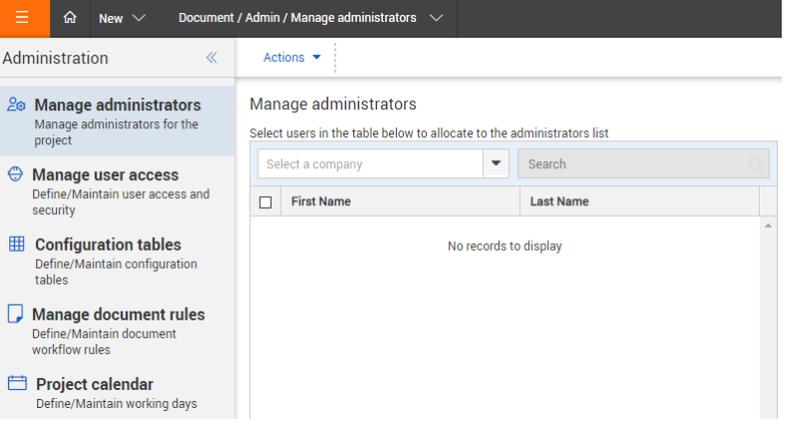
Click New and select the type of form.



Click the plus (+) icon and select form type.



## 8. Administration

Icon / Function	Classic UI	New UI
<b>Project Settings</b>	 <p>The Classic UI shows the InEight DOCUMENT logo and a support hotline. Below, a dropdown menu displays 'TRAINING501 - InEight Document Training Project ...' with a gear icon highlighted by a red box.</p>	 <p>The New UI shows a navigation bar with a gear icon highlighted by a red box. A settings menu is open, showing 'Project settings' and 'Admin' options, with 'Project settings' highlighted by a red box.</p>
<b>Admin</b>	<p>Click <b>Admin</b> in the top-right corner of the screen.</p>  <p>The Admin button is a grey rectangle with a gear icon and the text 'Admin'.</p>  <p>The Administration menu bar contains four items: 'Manage User Access', 'Configuration Tables', 'Manage Document Rules', and 'Project Calendar', each with a small icon and a brief description.</p>	<p>Click the <b>Gear icon</b> in the top-right corner of the screen and select <b>Admin</b>.</p>  <p>The New UI shows a settings menu with 'Project settings' and 'Admin' options. The 'Admin' option is highlighted by a red oval.</p> <p>Administrative functions are listed in the menu bar located in the left-hand side of the screen</p>  <p>The Manage administrators page shows a list of administrative functions on the left: 'Manage administrators', 'Manage user access', 'Configuration tables', 'Manage document rules', and 'Project calendar'. The main content area shows a search bar and a table with columns for 'First Name' and 'Last Name', currently displaying 'No records to display'.</p>

## Manage User Access

### Manage User Access

New Duplicate Delete Refresh Print More ▾

<input type="checkbox"/>	Security Group ▲	Title
<input type="checkbox"/>	000	Open User
<input type="checkbox"/>	ADMIN	Administrators
<input type="checkbox"/>	AUGUST	August Security Group
<input type="checkbox"/>	CA	Contract Administrators
<input type="checkbox"/>	CADM	Company Admin
<input type="checkbox"/>	CEO	Owner
<input type="checkbox"/>	CLIENT	Client
<input type="checkbox"/>	CLIENTUSER	Client User Access
<input type="checkbox"/>	COB	City of Brookland
<input type="checkbox"/>	CONS	Consultant
<input type="checkbox"/>	DC	Document Controller
<input type="checkbox"/>	DESIGNERS	Designer Group
<input type="checkbox"/>	EP	Elevated Users
<input type="checkbox"/>	EVGA	EVGA
<input type="checkbox"/>	FSSG	Fire Services Security Group
<input type="checkbox"/>	HCON	Head Contractor

Save Add Remove Refresh Print

Mail Type Access Transmittal Type Access Form Type Access Users Security

**Double-click** the security group to view/edit the default access level of each group. **Click the Access type** drop-down to manage security group's access level on Mail types, Transmittal types, Form types, modules and security.

Home New Document / Admin / Manage user access ▾

Actions +

### Manage user access: 000

Access type: Mail ▾

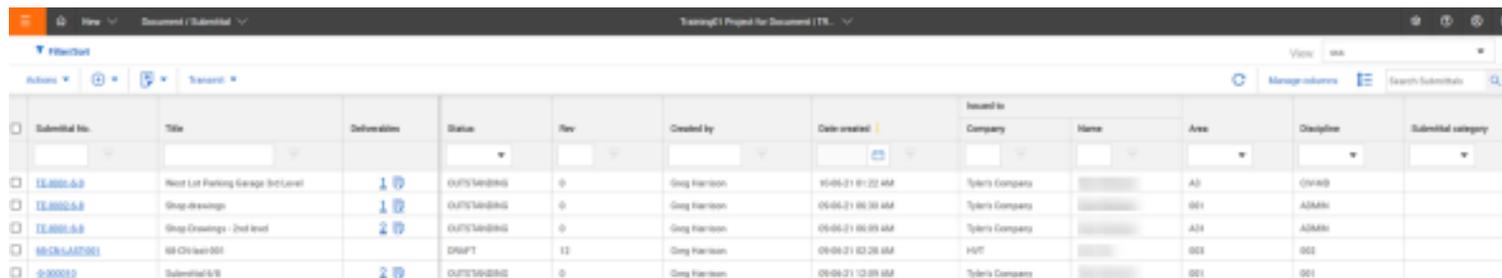
<input type="checkbox"/>	Security group ↑	Title	Mail type ↑	Title
<input type="checkbox"/>	000	Open User	AA	Architects Advice
<input type="checkbox"/>	ADMIN	Administrators	LET	Formal Letter
<input type="checkbox"/>	ALPINE	Alpine	LET-DR	Formal Letter Draft
<input type="checkbox"/>	CONS	Consultant	MEM	Memorandum
<input type="checkbox"/>	HC	Head Contractor	MOM	Minutes of Meeting
<input type="checkbox"/>	HC-R	Head Contractor Restricted	NOD	Notice of Delay
<input type="checkbox"/>	HC-R-L	Head Contractor Restricted For	RFI	Request for Information
<input type="checkbox"/>	OHS	Occupational Health & Safety	RFI-R	Request for Information Response
<input type="checkbox"/>	RL SEC	RL Sec Group	SDNR	Submittal Document Number Request
<input type="checkbox"/>	SREVIEW	Site Review	SI	Site Instruction
<input type="checkbox"/>	SUB	Sub Contractor	TN	Tender Query
<input type="checkbox"/>	TEST123	Test123	VAO	Variation Order
<input type="checkbox"/>	TEST123456	TEST123456	VAR	Variation Request
<input type="checkbox"/>	TESTUSH	TESTUSH		

## 9. New Modules

### Submittals module

The Submittals module lets you effectively manage the submittals process. It provides a centralized register to maintain reviews, statuses, communication, comments, and access for a project's submittals. Submittals are contractual documents that must be provided for external review or action, saving project man-hours and budget that might be spent on rework.

The Submittals register shows the submittals and their deliverables, status, revisions, and other information. From this register, you can add a submittal, export all items or selected items to a Microsoft Excel spreadsheet, or create a transmittal.



The screenshot displays the Submittals module interface. At the top, there is a navigation bar with 'New', 'Document / Submittal', and 'Training(1) Project for Document | TR...'. Below this is a filter bar with 'Filter On' and 'View: list'. The main area contains a table with the following columns: Submittal No., Title, Deliverables, Status, Rev, Created by, Date created, Issued to (Company, Name, Area), Discipline, and Submittal category. The table lists several submittals, including 'New Lot Parking Garage 3rd Level', 'Shop drawings', 'Shop Drawings - 2nd level', '88 CIVIAN 001', and 'Submittal 6/8'.

Submittal No.	Title	Deliverables	Status	Rev	Created by	Date created	Issued to	Company	Name	Area	Discipline	Submittal category
TL8001.0.0	New Lot Parking Garage 3rd Level	1	OUTSTANDING	0	Greg Harrison	10-09-21 8:22 AM	Tyler's Company			AD	OVMS	
TL8002.0.0	Shop drawings	1	OUTSTANDING	0	Greg Harrison	09-09-21 06:30 AM	Tyler's Company			001	ADMIN	
TL8003.0.0	Shop Drawings - 2nd level	2	OUTSTANDING	0	Greg Harrison	09-09-21 06:09 AM	Tyler's Company			AD1	ADMIN	
88-CIVIAN-001	88 CIVIAN 001		DRAFT	11	Greg Harrison	09-09-21 02:28 AM	HST			003	003	
0-000010	Submittal 6/8	1	OUTSTANDING	0	Greg Harrison	09-09-21 12:09 AM	Tyler's Company			001	001	

## 10. InEight Document Enhanced UI Releases

Refer to this link to read through release notes of Enhanced UI and its additional features.

[https://learn.ineight.com/Document\\_Enhanced/Content/Categories/ReleaseNotesStartPage.htm?tocpath=Release%20Notes%7C](https://learn.ineight.com/Document_Enhanced/Content/Categories/ReleaseNotesStartPage.htm?tocpath=Release%20Notes%7C) 0