

Document Enhanced UI 25.7 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 | 25-JUL-2025 | Initial Release |
| 2.0 | 04-AUG-2025 | Added information about the Enable central user management project setting. |
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What's new in Document 25.7

Web release notes

- **Administration**
 - **Central user management function** – A new central administration feature lets you manage users across projects in bulk. You can use Central user management to add contacts, make contacts inactive, and search for contacts across projects. You can log into the central administration from one project and then perform administrative actions across multiple projects in bulk. [Read more](#)
 - **Security group for check in and check out on Documents register** – You can now control who can check in or check out documents from the Documents register. To check in or check out documents, the new security group option Manage user access > Security > Document > **Check in/Check out** must be enabled.
 - **Mark service accounts as API only** – You can now mark a service account as API only. The API only option has been added to the Service account setting in the contact details. When selected, the account cannot sign in via the web browser or mobile application and can only sign in and access Document via APIs.
- **Getting started**
 - **Change language after signing in** – The User preferences menu options now include the Language drop-down menu, so you can change your language preference without having to sign out and sign back in. Previously, you could only change the language preference on the Sign-in page.
- **Documents**
 - **Save properties as a tool chest item** – You can now save multiple frequently used markup properties as a single entity and store it in the tool chest, so you do not have to apply each property individually. [Read more](#)
 - **Change document details with enhanced bulk upload** – When enhanced bulk upload is enabled, the Change document detail function defaults to using enhanced bulk upload tools. [Read more](#)
 - **Additional time recorded information in review registers** – The Date Recorded field in the document workflow registers has been updated to include the time.
- **Mail**
 - **Create an issue in InEight Change** – The Create issue icon has been added to the Mail Details page, so you can quickly add the mail item to a Change issue without leaving Document. The issue integration with Change can now be enabled for the Mail module by mail type. When enabled, the create issue button is available on the mail screen. [Read more](#)

- **Forms**

- **Support for dynamic tables** – The form builder now supports dynamic tables. Previously, dynamic tables were only supported as a customization. The Dynamic table control has been added to the form builder components. You can drag and drop the control into the form, adjust widths, and apply the table to your form.
- **Include or exclude linked items in exports** – When you export a form as PDF (complete), you now have the option to include or exclude form links. Previously, links were included by default in the generated PDF. [Read more](#)
- **Comments tab shown after saving** – The Comments tab now shows immediately after you save a form, so you can add comments prior to the form being issued.
- **Sign forms from the web application** – You can now sign forms in the Signature control field from the web application. Previously, signing was only supported on the mobile application.
- **Show Uploaded by and Uploaded date in forms Attachment sections** – New columns Uploaded by and Uploaded date have been added to the Attachment section of the form details.
- **Custom fields in form notifications** – A new customization lets you use custom fields in form notifications. For more information, contact your InEight representative.
- **Move Area, Discipline, and Location fields in Form builder** – You can now rearrange the Area, Discipline, and Location fields in the Initiator section of a form.

- **Checklists**

- **Duplicate checklist types** – You can now duplicate a checklist type in the Manage checklist types dialog box, so you can quickly use an existing checklist type as a template when creating a new one. [Read more](#)

- **Submittals**

- **Prompt to complete milestone dates** – When you close out a submittal and all the submittal milestone dates have not yet been completed, you are now prompted to complete these milestones. Previously, you had to close out all milestones on the Details page before you could close out the submittal. [Read more](#)
- **Bulk upload for submittals documents** – You can now use standard and enhanced bulk upload when uploading documents to the submittals Documents page.

- **Form ID in submittal details** – The Form ref no field has been added to the Submittals Details page, so you can see the reference number for forms linked through the submittal section of the form.
- **Submittal workflow widget tile** – A new tile that shows counts for your reviews in the submittal workflow is now available for you to add to your dashboard. Also, the existing Submittals widget has been updated to include a filter for showing submittal counts based on status or workflow status. [Read more](#)
- **Lots**
 - **Force Close-out status for items in lots** – A new setting, Module status must be closed prior to allowing item status to be changed at closeout, has been added to Project settings > **Lots**. When the setting is enabled, all items in a module must be closed before you can close a lot. For example, if you have mail in the lot, all mail items must be closed before you can close the lot.
- **Reports**
 - **New report for tracking download volume** – A new report shows report download volumes per person over a set number to help you identify suspicious activity.
- **InEight Document modules**
 - **Format painter for rich text** – A format painter has been added to text editors that support rich text. The format painter lets you quickly copy formatting, such as font, size, and boldface, and apply it to other text, so you do not have to apply each format individually. [Read more](#)
 - **Clear recipients in recipients lists** – When managing a recipients list, you can now clear recipients in bulk for each section. [Read more](#)

Mobile release notes

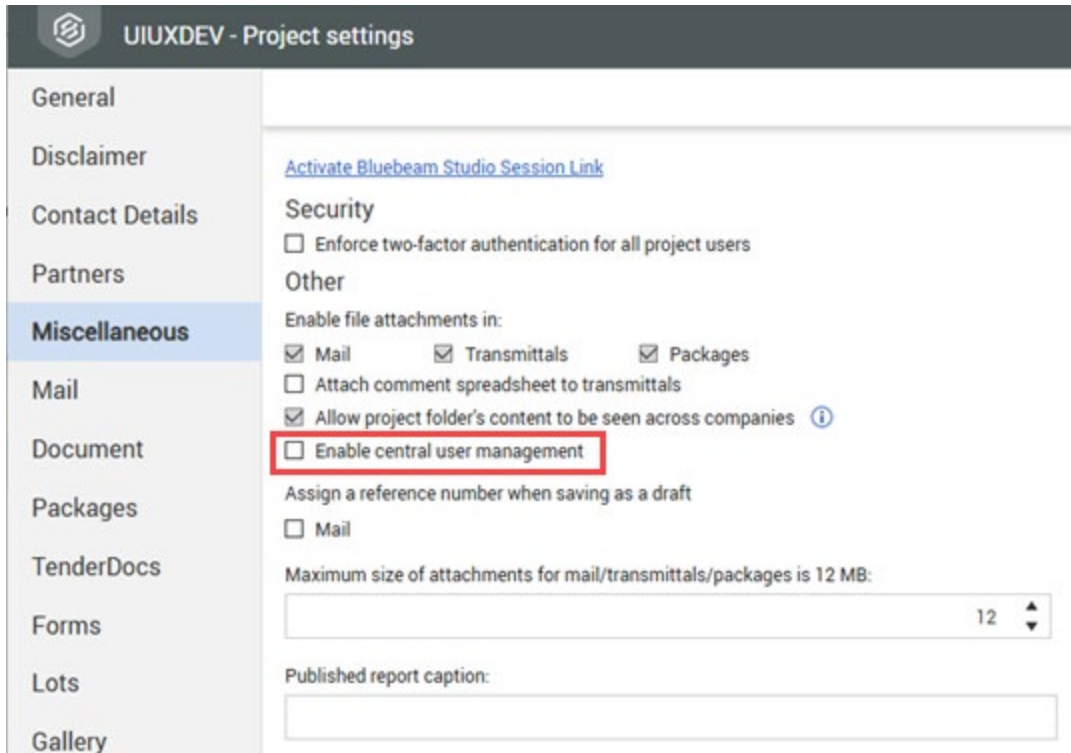
- **Lots**
 - **Create new items from lots** – The Lots page now includes the Add button, so you can add a new item, such as mail, defects, or forms, to a lot.
- **Mobile application**
 - **Update to dynamic table interactions** – Updates to the table interaction on both iOS and Android lets users work within dynamic tables, so you do not need to open an additional dialog box.
 - **Multiple language support** – Language translations are supported on the mobile app. You can now select the language on the app when you sign in or from your mobile user preferences.

Web release notes

Administration

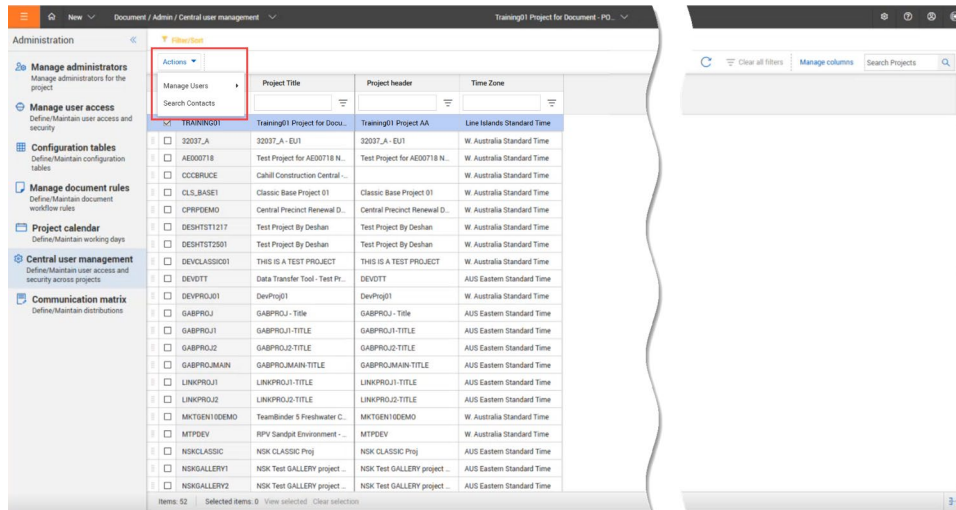
Central user management function

A new setting, Project > Miscellaneous > **Enable central user management**, lets you specify whether central administration actions are accessible from the project. If this option is not enabled for a project, the Central User Management function does not show as an Administration option, but changes can still be applied to that project.



The screenshot shows the 'UIUXDEV - Project settings' interface. On the left is a sidebar with navigation links: General, Disclaimer, Contact Details, Partners, Miscellaneous (selected), Mail, Document, Packages, TenderDocs, Forms, Lots, and Gallery. The main content area is titled 'Miscellaneous' and contains several settings. A link 'Activate Bluebeam Studio Session Link' is at the top. Under the 'Security' section, there is a checkbox for 'Enforce two-factor authentication for all project users' which is unchecked. Under the 'Other' section, there is a heading 'Enable file attachments in:' followed by three checked checkboxes: 'Mail', 'Transmittals', and 'Packages'. Below these are two more checkboxes: 'Attach comment spreadsheet to transmittals' (unchecked) and 'Allow project folder's content to be seen across companies' (checked with an info icon). The checkbox 'Enable central user management' is highlighted with a red rectangular box and is currently unchecked. Below this, there is a section for 'Assign a reference number when saving as a draft' with an unchecked 'Mail' checkbox. Further down, a label states 'Maximum size of attachments for mail/transmittals/packages is 12 MB:' followed by a numeric input field containing '12'. At the bottom, there is a label 'Published report caption:' followed by an empty text input field.

After central user management is enabled for a project, you can access Central user administration functions through Admin > **Central user management**. The page shows a list of all projects you have access to. You can search and select the applicable projects and then go to the **Actions** menu to select the action.



When you select an action, the applicable dialog box opens. Actions include the following:

- Add users, which lets you add contacts to multiple projects
- Search contacts, which lets you search for users and then manage their security groups, add them or remove them as an administrator, or make them inactive

To add contacts, select the applicable projects, and then go to Actions > Manage Users > **Add contacts**. The Add contacts wizard opens, where you can add the contacts.

To search for users, select the applicable projects, and then go to Actions > **Search Contacts**. The Search Contacts wizard opens. You can then enter search criteria to find contacts. From the search results, you can select users and then perform actions, such as making them inactive or managing their security groups.

Document validates any selections made in the dialog and lets you take corrective action. After you click **Add** or **Save**, the action is applied to the selected projects.

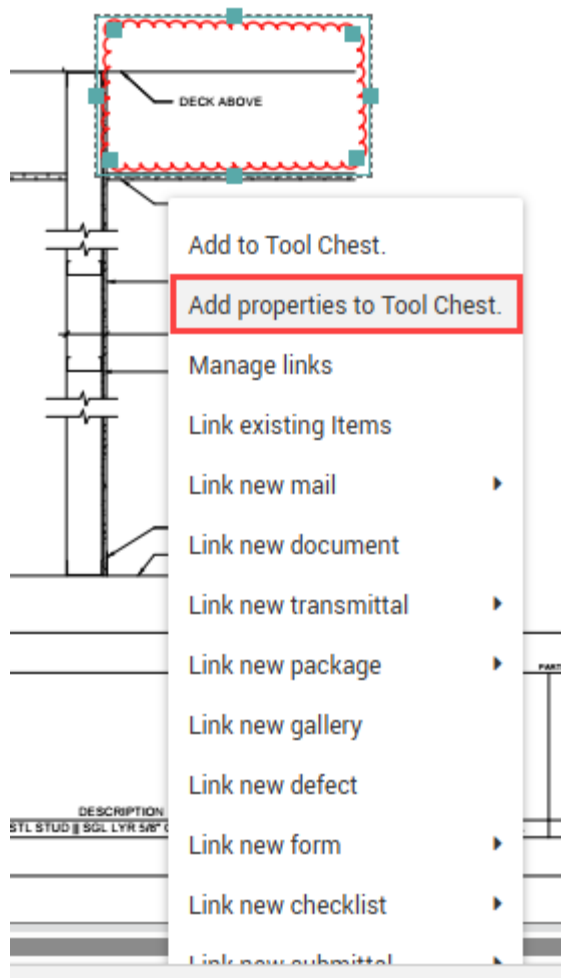
Note: As these actions can take place for many projects and users at the same time, the process will run in the background, and you will be notified of any errors.

You also have the option to export the list of users from any results page.

Documents

Save properties as a tool chest item

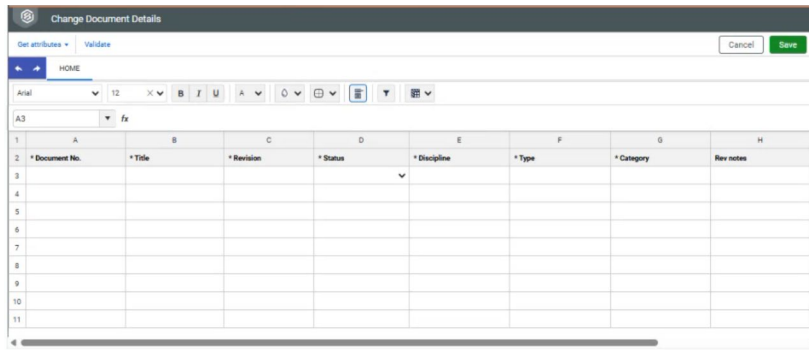
When you right-click an annotation, the option Add properties to Tool Chest shows. You can then select multiple properties, such as line thickness, color, fill color, opacity, and font information to save as a tool chest item.



For example, if you frequently mark up a document using a dark blue shape with a 2 pt. thickness, and a light blue fill, you can select the properties and save them to the tool chest. When you mark up a document, you can then quickly pick this tool chest item with the saved properties, rather than changing your defaults or editing the standard markup type each time.

Change document details with enhanced bulk upload

To change document details from the Documents register, go to Actions > Admin > **Change document details**. When enhanced bulk upload is enabled, the bulk upload interface opens.





























The interface lets you enter change data, so you can easily manage the process for multiple documents.

Mail

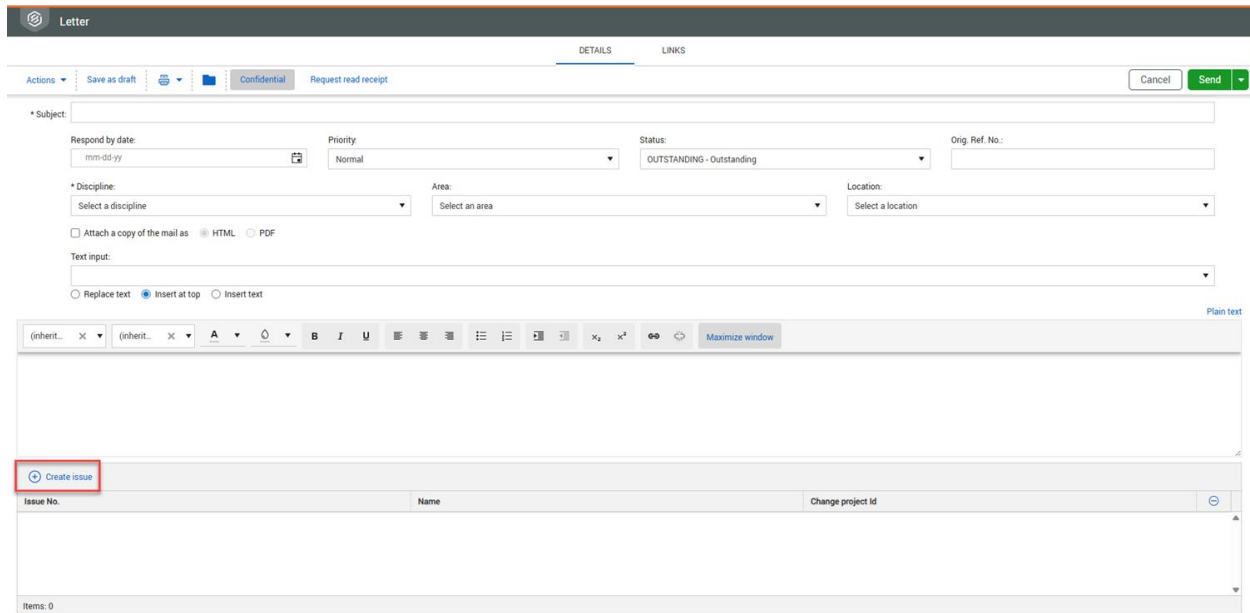
Create an issue in InEight Change

If the issue integration is set up for a project, it can also be enabled for the mail module by mail type. This can be enabled through Actions > Admin > Configure mail workflow > **Enable Issue Creation**.

Configure Mail Workflow ×

| Fwd Type | Reply Type | Enable File Attach... | Mandatory Recipi... | Default Text Input | Mandatory Field | Allow Single Mail ... | Available in Tende... | Enable Issue Creation | Attribute Values |
|----------|------------|-------------------------------------|---|--------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------|
| CA/MEMO | LETTER | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| ANY | ANY | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Define Attribute Val... |
| MEMO | MEMO | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| N/A | N/A | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| ANY | RFI-R | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| ANY | RFI-R | <input checked="" type="checkbox"/> |  | Select one |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| N/A | N/A | <input checked="" type="checkbox"/> |  | Select one |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| ANY | ANY | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| TC-R | TC-R | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| N/A | N/A | <input checked="" type="checkbox"/> |  | Select one |  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| ANY | ANY | <input checked="" type="checkbox"/> |  | Select one |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| LETTER | VO | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |
| ANY | ANY | <input checked="" type="checkbox"/> |  | Select one |  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Define Attribute Val... |

When Document is integrated with Change, you can click the **Create issue** icon in Mail details to add an issue.

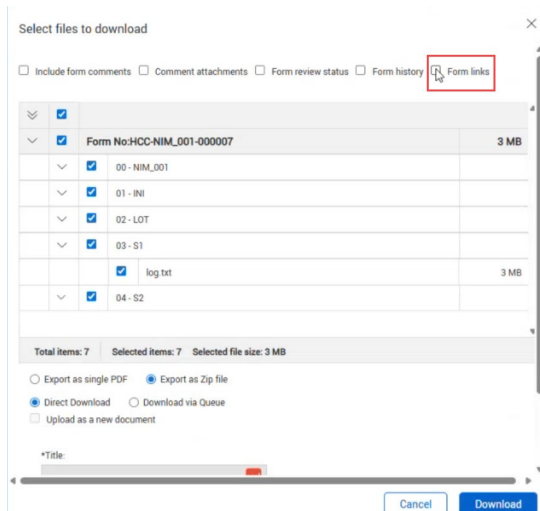


The Create a new issue dialog box opens, where you can enter an issue name, date, and a description. You can then click **Save** to add the issue in Change. The mail item is not sent until the issue is created and the linked issue is saved against the mail item.

Forms

Include or exclude linked items in exports

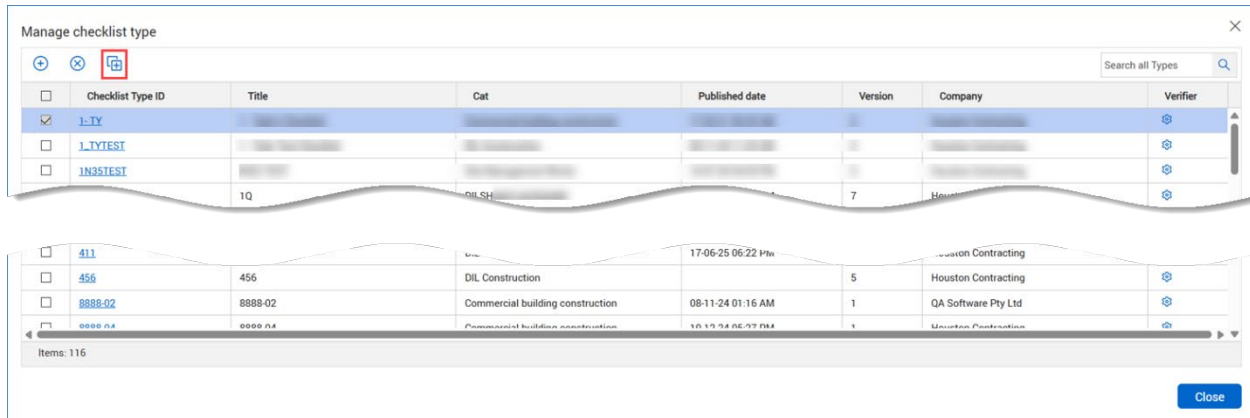
Now, when you export a form as a complete PDF, the Select files to download dialog box includes the Form links check box. When you select the check box, the exported form includes links.



Checklists

Duplicate checklist types

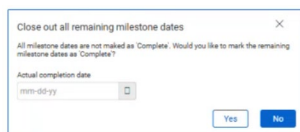
The Duplicate icon has been added to the Manage checklist type dialog box. To duplicate a checklist type, select a checklist type, and then click the **Duplicate** icon. You can then edit it as needed to create a new checklist type.



Submittals

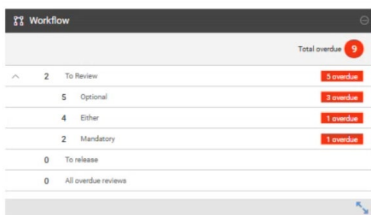
Prompt to complete milestone dates

Now, when there are milestones on a submittal that are not completed and you try to close out the submittal, Document prompts you to close out all remaining milestone dates and lets you select the actual completion date.

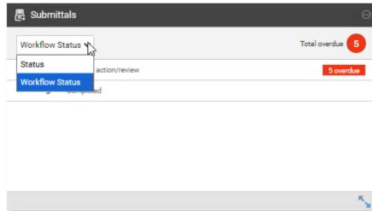


Submittal workflow widget tile

The submittal Workflow tile shows the total number of items to review, which are labeled Optional, Either, and Mandatory review items. The tile also shows the total number of overdue reviews.



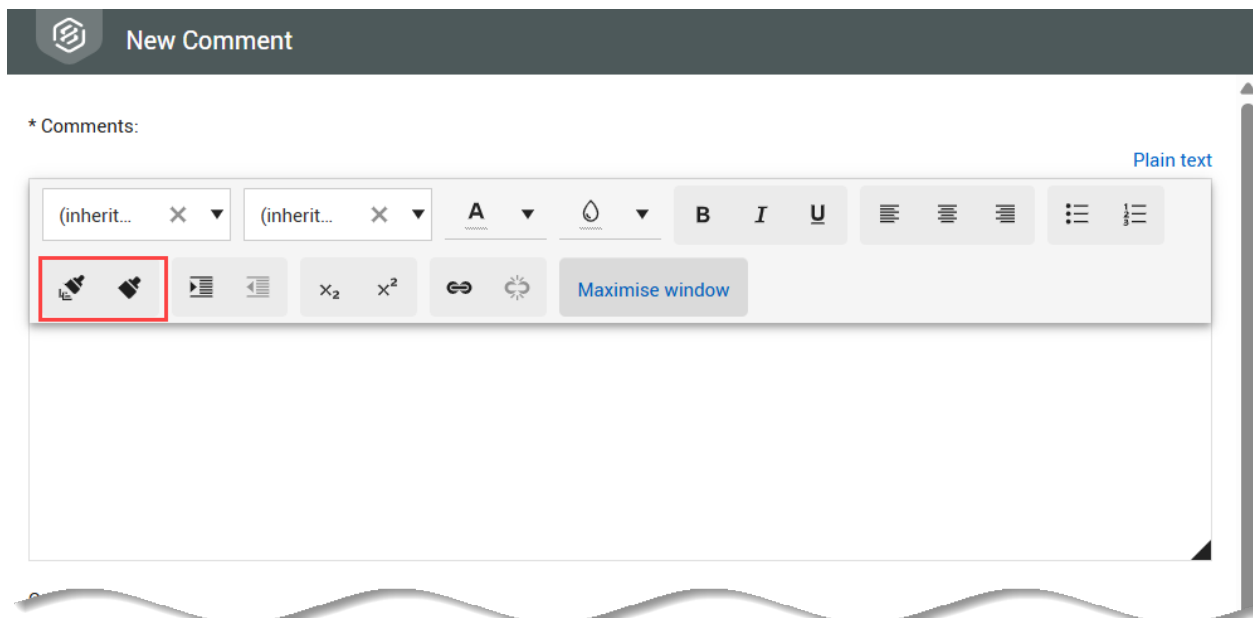
The existing Submittals tile now includes a drop-down menu that lets you choose to view submittals by status or workflow status.



InEight Document Modules

Format painter for rich text

Format painter icons for copying and applying formats have been added to text boxes that support rich text.



Note: This feature is not supported for forms and checklists.

To use the Format painter, add and format text, and then click the **Copy format** icon. You can then select other text and then click the **Apply format** icon to apply the text formatting.

Clear recipients in recipients lists

The Remove recipients icon has been added to the Allocated sections in the Select recipients dialog box. You can click the icon to remove all recipients in that section.

Select recipients

* Display: ☒ All users ☐ Contact groups

Select contacts to allocate:

Houston Contracting ▼ Search



| <input type="checkbox"/> | Name | Allocated |
|--------------------------|------------------|-----------|
| <input type="checkbox"/> | Ben Hopgood | To |
| <input type="checkbox"/> | Client Solutions | Cc |
| <input type="checkbox"/> | Greg Harrison | |
| <input type="checkbox"/> | Konrad Korzen | Bcc |
| <input type="checkbox"/> | Lisa Estilo-HCC | |
| <input type="checkbox"/> | Moayad AbuSultan | |
| <input type="checkbox"/> | Project Delivery | Cc |
| <input type="checkbox"/> | Tyson doyle | |
| <input type="checkbox"/> | Zara Riley | |

→ To

Allocated: [Clear allocated](#)




Search

Recipients added to: To

| Name | Email | HC |  |
|-----------------------------------|--------------------------|--------------------------|---|
| Ben Hopgood (Houston Contracting) | <input type="checkbox"/> | <input type="checkbox"/> |  |



→ Cc

Recipients added to: Cc

| Name | Email | HC |  |
|--|--------------------------|--------------------------|---|
| Client Solutions (Houston Contracting) | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Project Delivery (Houston Contracting) | <input type="checkbox"/> | <input type="checkbox"/> |  |

→ Bcc

Recipients added to: Bcc

| Name | Email | HC |  |
|-------------------------------------|--------------------------|--------------------------|---|
| Konrad Korzen (Houston Contracting) | <input type="checkbox"/> | <input type="checkbox"/> |  |

Cancel

Save