

Document Enhanced UI 26.3 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	19-MAR-2026	Initial Release

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What's new in Document 26.3

Web Release Notes

- **Documents**
 - **Document summaries** – Document can now use AI to summarize files on demand. The summary includes key information that is in the file, such as the type of file, who uploaded it, and the purpose of the document. [Read more](#)
 - **Preview linked items when hovering over an annotation** – When you hover over an annotation in the viewer, hover text shows a preview of linked items. The preview lets you quickly see any linked RFIs, defects, or other items that might have been raised because of the annotation. [Read more](#)
 - **Viewer context menu organization** – The context menu in the PDF viewer has been reorganized to be more organized, shorter, and easier to use. [Read more](#)
 - **Manage columns in enhanced bulk upload** – You can now adjust the column width and change the column position in the Enhanced bulk upload dialog box, so the information you want to see is featured prominently. [Read more](#)
 - **Filter documents based on comment or annotations data** – You can now filter documents in the register based on comments or annotations against the document or the comment's status. [Read more](#)
 - **Release Comments register pagination** – You can now switch between pagination and virtual scrolling on the Release register. [Read more](#)
- **Administration**
 - **Update contact details in Central user management** – You can now use Central user management to update contact information, such as the email address or last name. [Read more](#)
 - **Send credentials to a user from Central user management** – Central user management now lets you send a welcome notice with sign-in credentials to a selected user. [Read more](#)
- **Submittals**
 - **Automatically generate submittals from a specification** – You can now generate submittals from a specification. Previously, you had to search the specification and manually enter the submittals. Now, you can upload the specification, and then Document uses AI to find the submittals and create them automatically. [Read more](#)
 - **Enhanced import functions** – The Submittals import now supports enhanced bulk upload functions to give you more flexibility when entering import data. The enhanced import interface is like a Microsoft Excel spreadsheet, where you

can use features such as copy and paste or dragging values to quickly enter submittal data on the Import submittals page.

- **Comments tab pagination** – You can now switch between pagination and virtual scrolling on the Comments tab. [Read more](#)
- **Checklists**
 - **Include hyperlinks in checklists through the Reference file control section** – You can now add a predefined hyperlink to a reference type in the checklist builder, letting you embed a common link to procedures or process maintained outside of Document. Previously, the user could only attach a file as a reference. [Read more](#)
 - **Make a Lots section mandatory in Checklist builder** – You can now make the Lots section of a checklist mandatory based on the checklist type. [Read more](#)
 - **Default verifier for a section** – When there is only one user or role specified as the verifier for a checklist type, the checklist Verification section now defaults to that verifier.
- **Forms**
 - **For Info users and roles can view entire form** – Users added as *For Info* for a form section, can now view the entire form. This visibility gives the form user context for acting on their section. Previously, they could only see the section they were added to. Form users can now view the entire form but they receive a notification only for the step they are added to.
- **Packages**
 - **Create contacts from a package** – The Add new contact option is now available when you create a package, so you can send the package to someone who is not yet in the Document address book. [Read more](#)
- **Transmittals**
 - **Download files with annotations only when comments are included** – Transmittal recipients can now download only files with annotations when the Include comments check box is selected. When the Include comments check box is not selected, the transmittal does not show the option to download with annotations.
- **Reports**
 - **Submittal reports new fields** – The Description, Alt reference number, and Schedule activity ID fields have been added to the Details by Submittal number report (90.001) and the Details by Deliverable number report (90.005).
- **General**
 - **Disable double-click to open items from registers** – The ability to double-click to open items has been disabled to ensure that the selection of items is not lost

when opening additional items. Now items are only opened by clicking the hyperlinks for individual items.

Mobile Release Notes

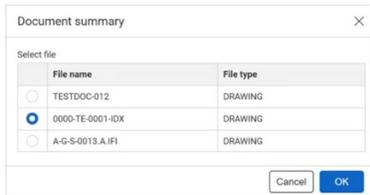
- **Mobile app**
 - **Download or update all items** – Registers in the mobile app now include a Select all button, so you can quickly download or update all items in the register. [Read more](#)
 - **Download percent complete** – The download progress now shows at the top of the page when you when you reopen the mobile app. [Read more](#)

Web release notes

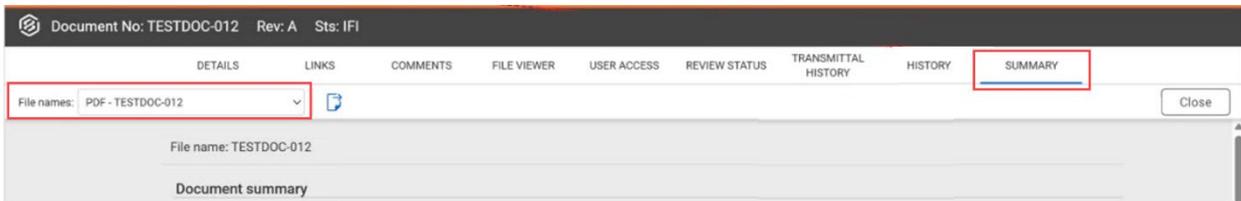
Documents

Document summaries

The Document summary option has been added to the Actions menu on the Documents register and to the tool bar on the document Details page. To generate a summary, select **Document summary**. You can then select the file you want to summarize.



Document then uses AI to review the file and create a summary. A summary for the file is added to the new Summary tab.



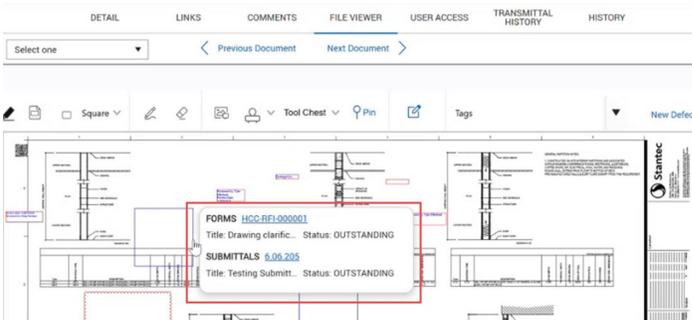
If you have generated summaries for multiple files, you can use the File names drop-down menu to select a file summary.

You can export the summary as needed.

Contact InEight to activate the document summary feature.

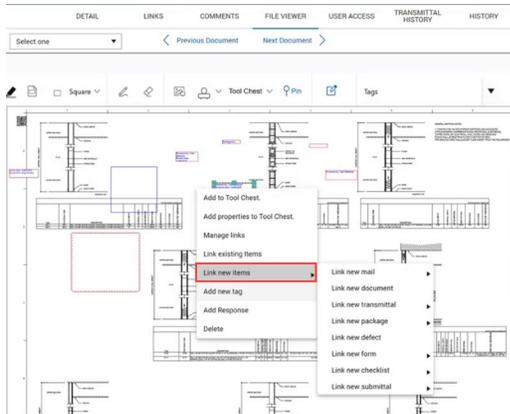
Preview linked items when hovering over an annotation

The preview shows the type of item linked, such as a form, and a hyperlink to the item. This lets you quickly see where an annotation might be impacted and by what.



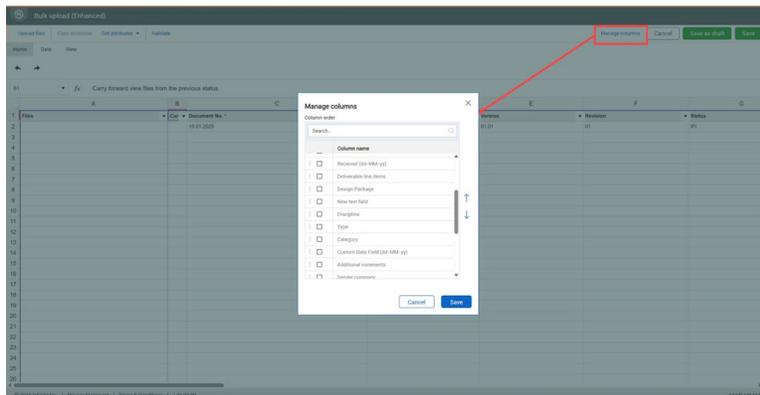
Viewer context menu organization

When you right-click an annotation in the PDF viewer, the context menu is now shorter and more fluid, taking up less visual space. The options to link new items have been condensed into submenus.



Manage columns in enhanced bulk upload

The Manage columns button has been added to the top of the Bulk upload (Enhanced) dialog box, so you can set up a custom bulk upload page to suit the way you work.



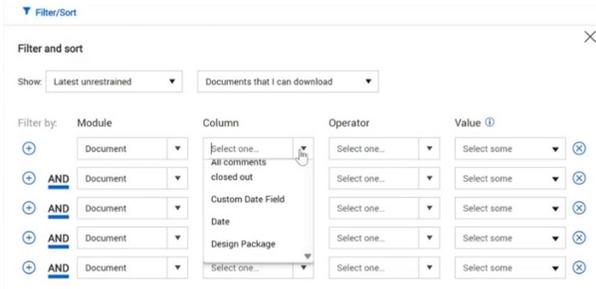
To change the column position, select it and then click the up or down arrows to move the column.

You can drag a column header to make the column wider or narrower.

The new column arrangement is preserved if you leave the page and return later.

Filter documents in the Documents register on comment or annotations data

Additional filter conditions have been provided so that projects can run filtering on comment information. This lets you search for documents with specific comments or annotations and whether the comments or annotations are open.



The new All comments closed out value shows you all documents with comments that are all closed out or documents with outstanding comments.

The new Has annotations value shows you all documents with or without annotations.

The new Has comments value shows you all documents with or without comments.

Release Comments register pagination

The pagination icon has been added to the bottom right of the Comments register used by the review coordinator. When you use pagination, the register shows entire comments without having to open each comment to validate them.

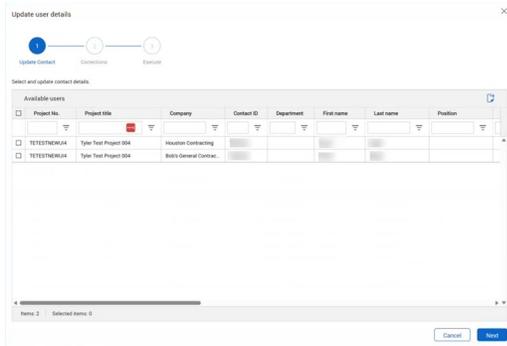


The icon shows when pagination is enabled in the project settings (Project settings > Miscellaneous > **Register pagination layout**) and in your user preferences (User preferences > General > **Register pagination layout**).

Administration

Update contact details in Central user management

Use the Search contacts feature to find a specific user, and then select Actions > **Update user details**. The Update user details dialog box opens.

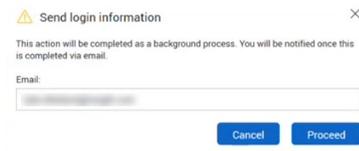


You can then update the contact's user detail information and apply the information across multiple projects.

Send credentials to a user from Central user management

When a user requests their sign-in information, you can use Central user management to send the credentials immediately.

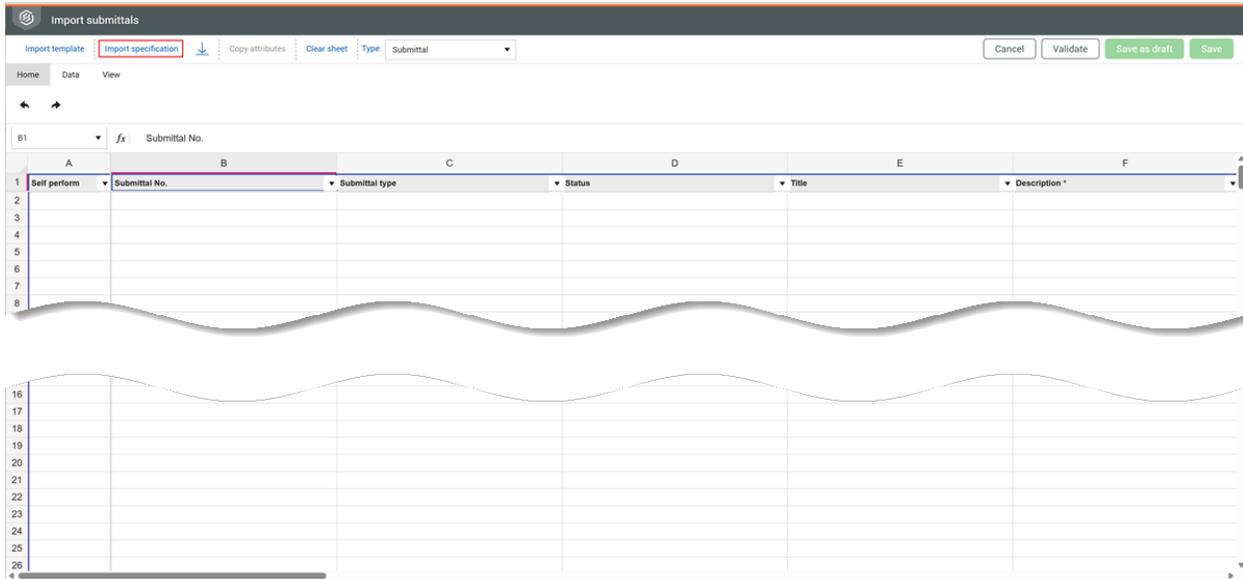
Use the Search contacts feature to find the contact, and then select Actions > **Send login information**. The Send Login information dialog box opens. You can then verify the email address and send the credentials.



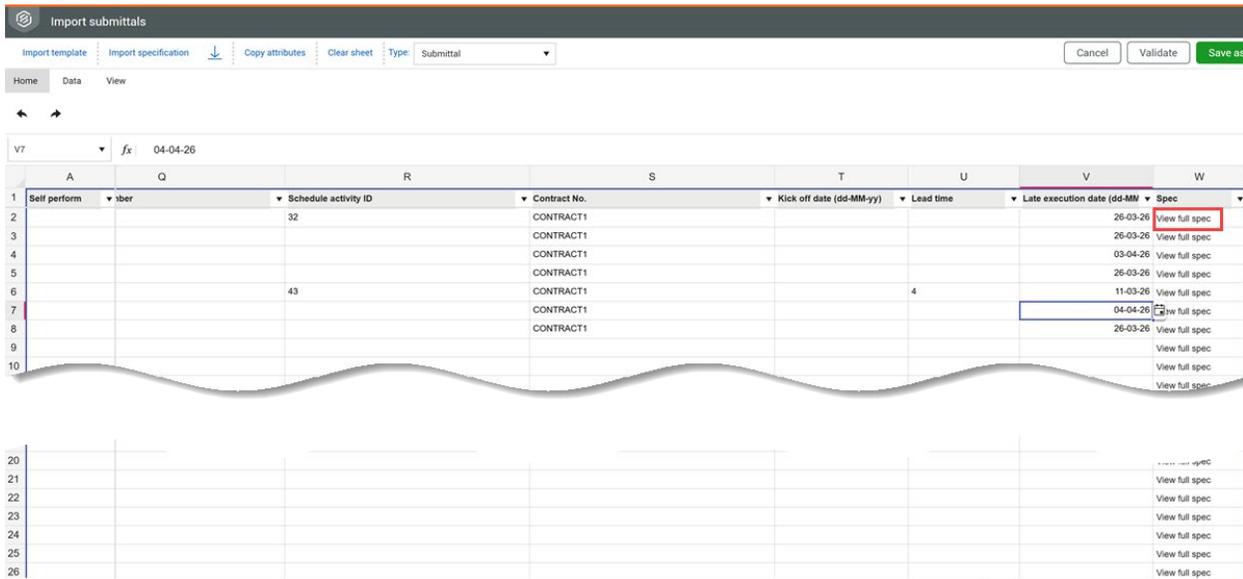
Submittals

Automatically generate submittals from a specification

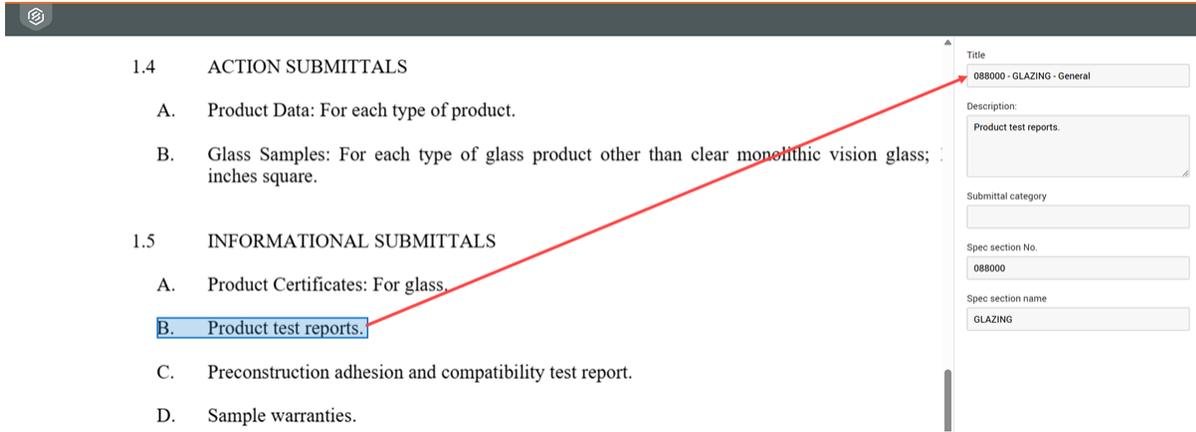
The submittal import function has been enhanced to support importing specifications making it easier to read through a specification. The import can assist in reading through a specification, suggesting the submittals to be created, and allowing validation of this information. The Import specification button has been added to the Import Submittals dialog box.



To upload the specification, click **Import specification**. A dialog box opens, where you can upload the specification to Document. Upon uploading, Document uses AI to search the specification for submittals and populates the grid in the Import Submittals dialog box with the results. The View spec option lets you view where the submittal was extracted from the specification.



To view the submittals, click **View full spec**. The specification opens in a slide-out panel. You can then scroll to view each item identified as a submittal. Click the submittal item to see associated data.



1.4 ACTION SUBMITTALS

- A. Product Data: For each type of product.
- B. Glass Samples: For each type of glass product other than clear monolithic vision glass; 1/8 inches square.

1.5 INFORMATIONAL SUBMITTALS

- A. Product Certificates: For glass.
- B. Product test reports.**
- C. Preconstruction adhesion and compatibility test report.
- D. Sample warranties.

Title: 088000 - GLAZING - General

Description: Product test reports.

Submittal category:

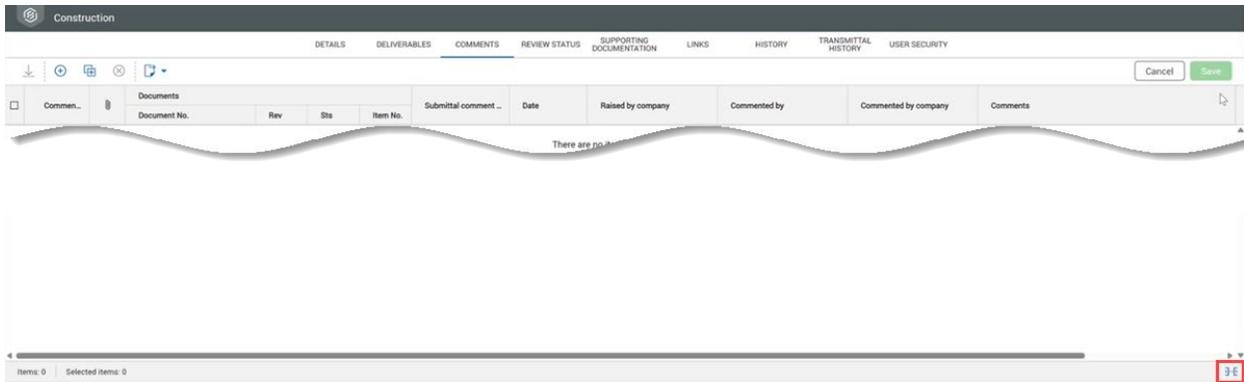
Spec section No.: 088000

Spec section name: GLAZING

You can then validate and save the items as you would with other imported items to add them to the Submittals register.

Comments tab pagination

The Pagination icon has been added to the bottom right of the Comments tab.



Construction

DETAILS DELIVERABLES COMMENTS REVIEW STATUS SUPPORTING DOCUMENTATION LINKS HISTORY TRANSMITTAL HISTORY USER SECURITY

Cancel Save

Document No.	Rev	Sta	Item No.	Submittal comment ...	Date	Raised by company	Commented by	Commented by company	Comments
There are no items in this list.									

Items: 0 Selected items: 0

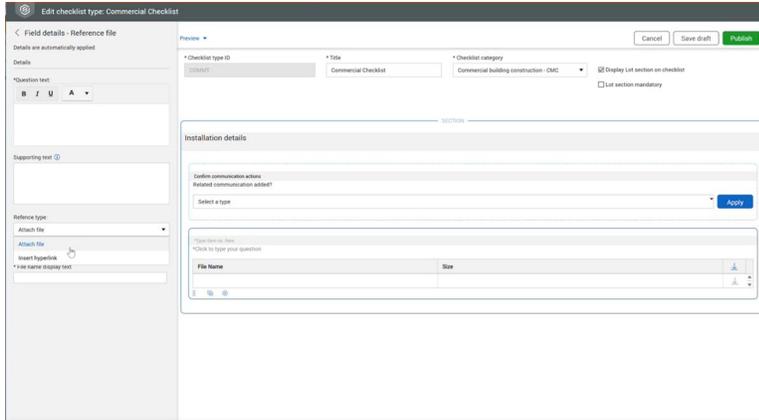
The icon shows when pagination is enabled in the project settings (Project settings > Miscellaneous > **Register pagination layout**) and in your user preferences (User preferences > General > **Register pagination layout**).

Checklist

Include hyperlinks in checklists through the Reference file control section

When you add a Reference file in the Checklist builder, you can now choose whether to provide a hyperlink to the reference or attach a file, letting you direct the checklist user to a web-based procedure rather than having to reattach an updated file.

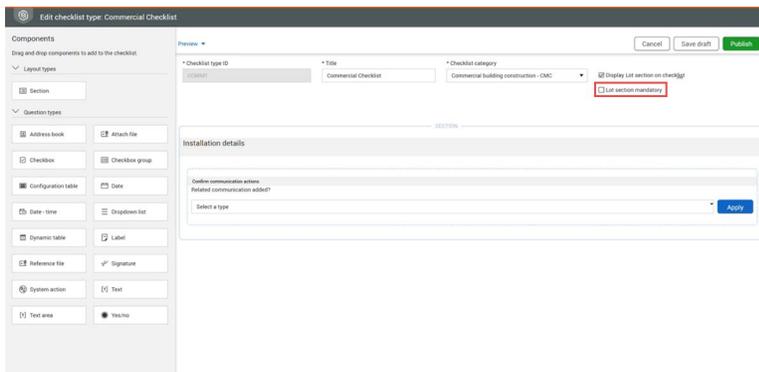
The Reference type field has been added to the details for the Reference file. You can select *Attach file* or *Insert hyperlink*.



When you select *Insert hyperlink*, you can then provide the URL in the reference field.

Make a Lots section mandatory in Checklist builder

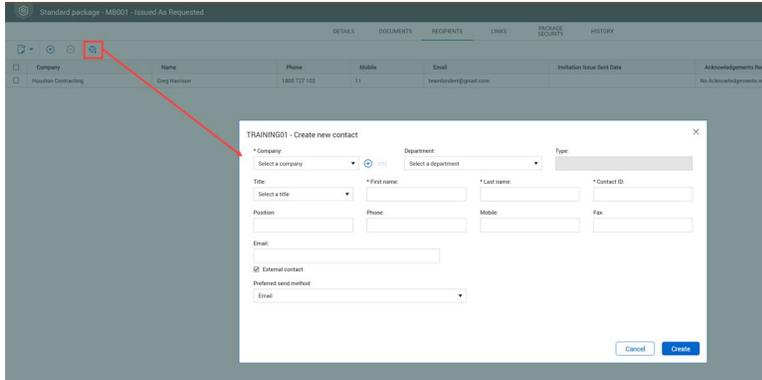
The Display Lot section mandatory check box has been added to the Checklist builder. When the Display Lot section on checklist check box is selected, you can select the **Lot section mandatory** check box to make the Lot section required. The checklist user must then link a lot to that section as a requirement to issue the check list, so you can make sure specific checklist types carry this information.



Packages

Create contacts from a package

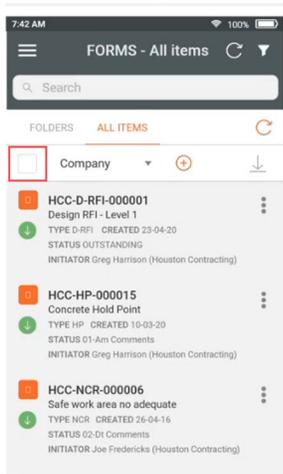
The Create new contact icon has been added to the toolbar on the package Recipients page for packages that have not been closed. Click the icon to open the Create new contact dialog box.



Mobile Release Notes

Mobile app

Download or update all items



Download percent complete

