

Document Enhanced UI 26.5 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	21-MAY-2026	Initial Release

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What's new in Document 26.5

Web Release Notes

- **Documents**
 - **Prevent schedule date changes for existing reviewers** – You can now prevent changes to the schedule completion date for existing reviews when the workflow is updated with new reviewers. [Read more](#)
 - **Hide annotations in the PDF viewer** – You can now hide all annotations in the PDF viewer, so with a single click you can view a clean page without markups. [Read more](#)
- **Office Online integration**
 - **Publish Office Online document as a new status** – When publishing a document from Office Online, you now have the option to publish the document as a new status, so you do not have to change the revision to publish document updates. [Read more](#)
- **Administration**
 - **Set register pagination and mail footer user preferences at the project level** – You can now set the user preferences for the pagination option for registers and the mail footer at the project level for all users. [Read more](#)
 - **Reset two-factor authentication** – Administrators can now reset two-factor authentication, so they can assist users when there are authentication issues. Resetting two-factor authorization is not enabled by default. For more information, contact your InEight representative.
 - **Exclude attachment summary file** – You can now specify whether to include or exclude the summary file that is automatically generated for when you add an attachment to a form or mail. [Read more](#)
- **Submittals**
 - **Submittal status in notifications** – After a submittal has been issued to the issuing company, the submittal status now shows as *Outstanding* in the notification. Previously, the submittal status showed as *Draft*.
 - **Bulk download from Documents page for managing company** – The bulk download feature is now available to the managing company on their Documents page. Previously, you had to download each document individually. [Read more](#)
 - **Manage new submissions manually** – A new project setting lets you specify whether to have Document automatically remove the new submission indicator or to remove it manually. [Read more](#)

- **Checklists**
 - **Define checklist distribution** – You can now define distribution groups for checklists. [Read more](#)
 - **Add dynamic sections to a checklist** – Checklist sections can now be configured to be duplicated so that multiple users can complete them. The Dynamic section type has been added to the Checklist builder, which lets checklist users duplicate a section. [Read more](#)

- **Forms**
 - **Form type history** – The History tab has been added to the Configure Form Types dialog box, so you can track changes to workflows, distribution, and statuses for the form type.
 - **Submittal section in the Form builder supported in all sections** – You can now place the Submittal section in any part of a form when using the Form builder. Previously, you could only place the Submittal section in the Initiator section.
 - **Send close-out notification for each form** – You can now request that close-out notifications be sent at the point of closure instead of in the daily summary notification. For more information, contact your InEight project delivery team.
 - **Rich text in the Form builder Label control** – The Label control type in the Form builder now supports rich text.
 - **Duplicate form type** – You can now duplicate a form type. The duplicate copies all the controls and formatting of the form type to be published in the Form builder. [Read more](#)

- **Mail**
 - **Bulk selection for send method** – When you select mail recipients, you can now bulk select whether the recipients receive email and hard copies.

- **Packages**
 - **Package PDF viewer navigation** – The PDF viewer within the package now includes Previous and Next buttons.

- **Transmittals**
 - **Document details link in Transmittals** – When you access the download section of a transmittal, the Transmittal download dialog box now includes a link to the document's Details page in the Document No. field.

- **Reports**
 - **Authentication data Session history report** – The Session history report (02.020) now includes a column indicating whether users have two-factor authentication enabled, providing additional security visibility for stakeholders.

- **Review Comments report comment type filters** – The Review Comments – by Document report (07.020) now has filters to include text comments, annotation comments, or both. Previously, only text comments were included. [Read more](#)
- **General**
 - **Updated Sign-in page** – The Sign-in page has been updated to align with the standards of the user interface. [Read more](#)
 - **Multiselect fields in dynamic folders** – Multiselect fields are now available when you set up a dynamic folder.
 - **Assign folder access based on company** – You can now specify which companies have access to a folder. Previously, you could only give folder access to your company and had to use the Project access, which gives access to all companies. [Read more](#)
 - **Details tab item count** – When you are on a Details page, badges on the Documents, Attachments, and Comments tabs now show the item count. [Read more](#)
- **APIs**
 - **New Document calls** – The Replace view file and Resubmit for review calls are now available in the APIs.

Web release notes

Documents

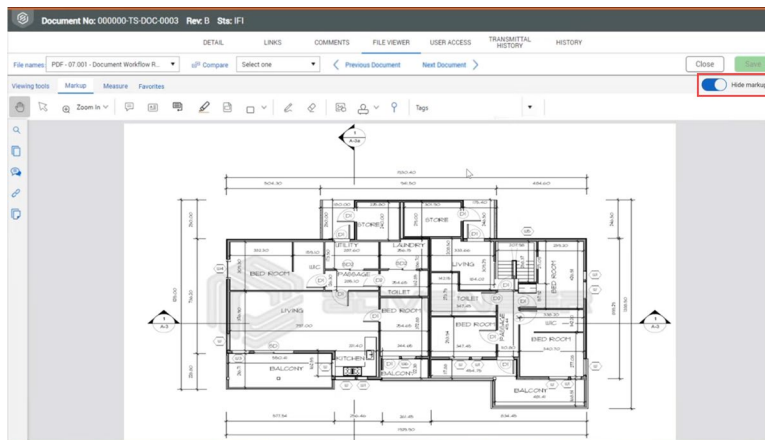
Prevent schedule date changes for existing reviewers

The setting Review scheduled completion date cannot be changed has been added to Project settings > Document > **Review/Release**. When the setting is enabled, you cannot change the scheduled completion date of reviews that are already in progress.

When reviewers are added to review, you cannot give that reviewer more time than what remains in the total review time. Doing so could result in a reviewer being added after the scheduled completion date and the review being immediately overdue.

Hide annotations in the PDF viewer

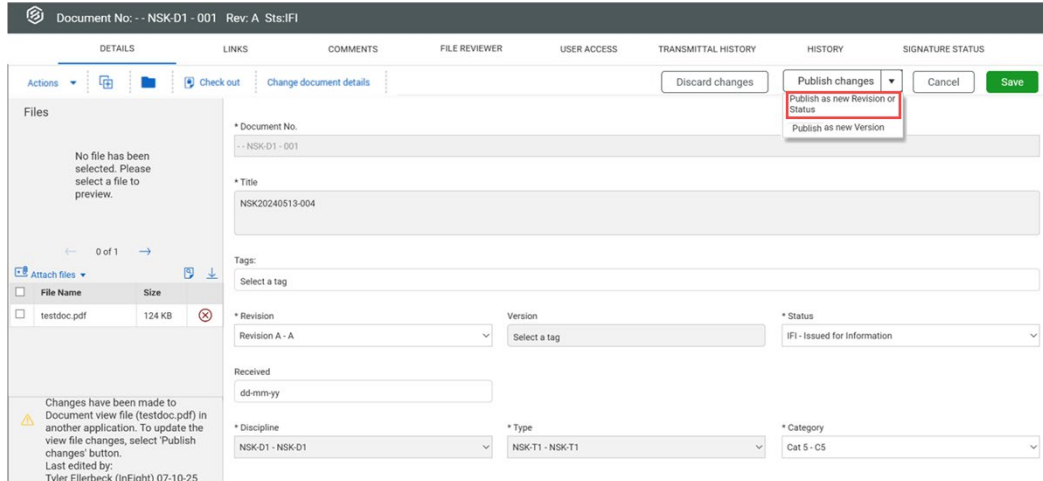
The Hide markups toggle has been added to the Markup tab of the PDF viewer. Set the toggle to *On* to hide all markups in the document.



Office Online integration

Publish Office Online document as a new status

The option Publish as new Revision or Status has been added to the Publish changes dialog box on the document's Details page. You can select **Publish as a new Revision or Status**, and then select the revision or status from the Status field.



Administration

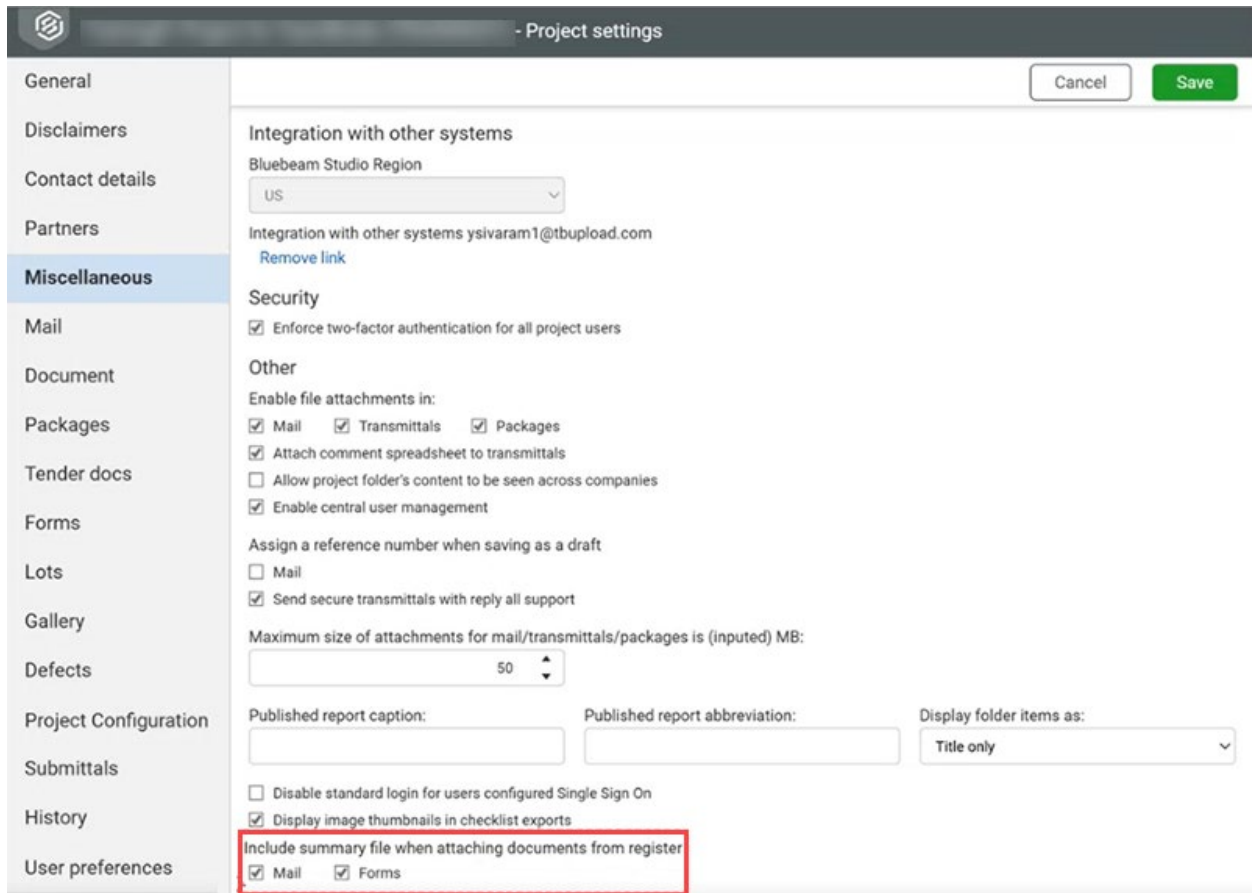
Set register pagination and mail footer user preference at the project level

The Provide pagination to users toggle has been added to Project settings > **User preferences**. This option shows when pagination is enabled in (Project settings > Miscellaneous > **Provide pagination to users**). After the setting is enabled at the project level, users can go to their user preferences and change the default setting.

The Preferred mail footer field has been added to Project settings > User preferences > **Mail**. You can add a mail footer at the project level, and then users can modify the footer in their own user preferences.

Exclude attachment summary file

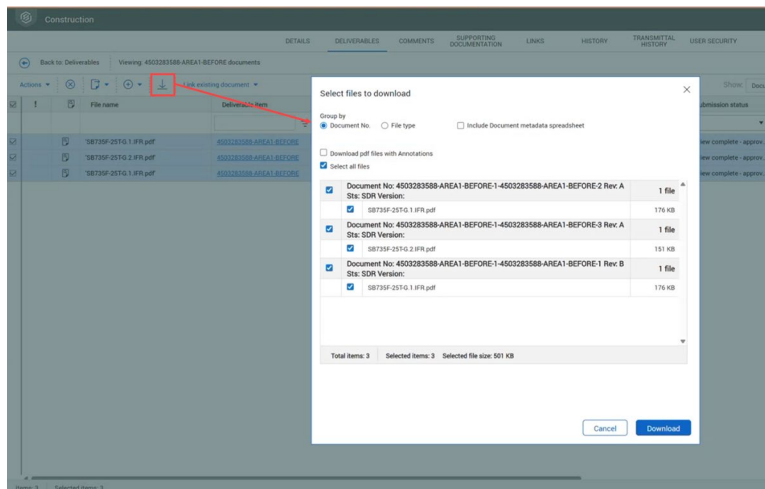
The setting Include summary file when attaching documents from the register has been added to Project Settings > **Miscellaneous**. You can select for both mail and forms whether to include or exclude the summary file.



Submittals

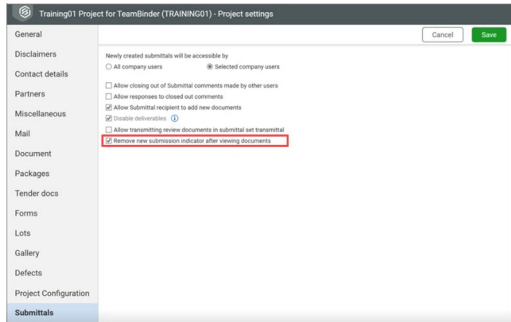
Bulk download from Documents page for managing company

The Download icon has been added to the managing company's Documents page. Click the **Download** icon to open the Select files to download dialog box. You can then select one or more files to download.



Manage new submissions manually

Previously, Document automatically removed the indicator when you opened a document making it difficult to keep track of newly submitted documents that might need further action. Now, the new project setting Submittals > **Remove new submissions indicator after viewing** lets you choose whether the indicator is automatically removed after viewing documents for the project.

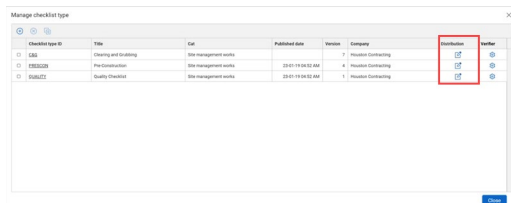


When the setting is disabled, you must manually remove the new submission indicator from documents.

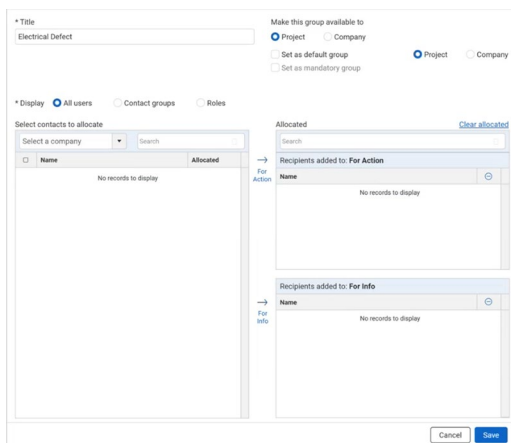
Checklists

Define checklist distribution

The Distribution section has been added to the Manage checklist type dialog box.

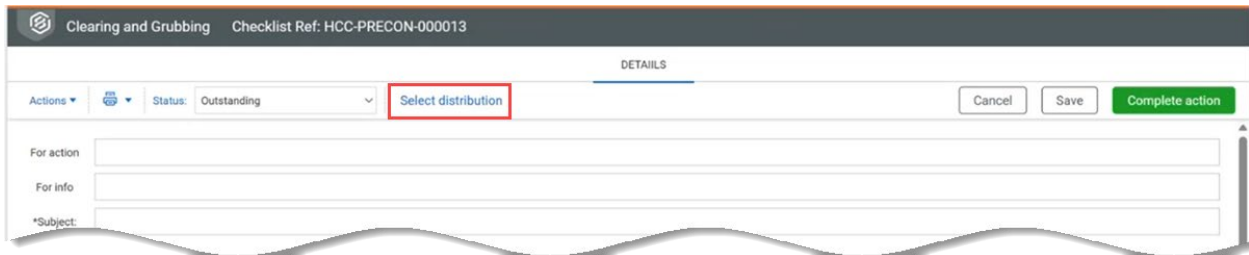


When you click the **Edit** icon in the column, the Edit Distribution dialog box opens. You can use the settings on this page to set up distribution groups.



You can also specify who can use each group and whether it is mandatory or selected by default.

The Select distribution button has been added to checklists. When you create a checklist and want to send it to a distribution list, click **Select distribution** to see a list of all applicable distribution groups. You can select more than one distribution group and add these to the checklist.



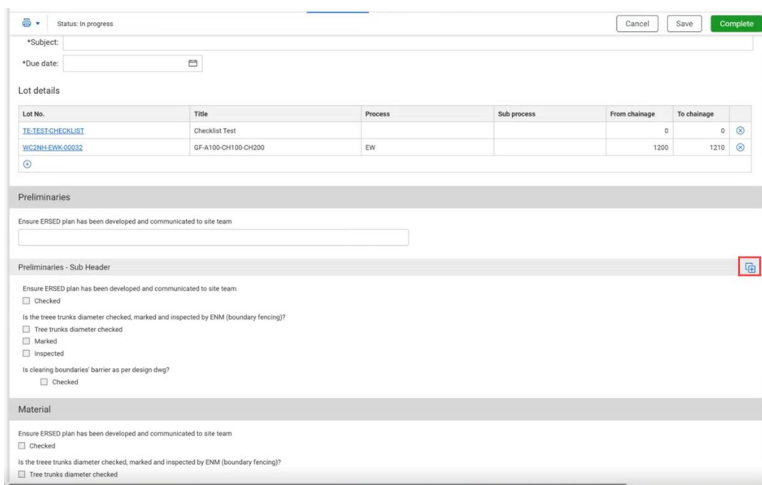
The users are added to the applicable field based on how you set up the distribution.

Add dynamic sections to a checklist

When you add the Group control question type to a checklist, you can then format a section, such as a check box or drop-down list. When a checklist of that type is created, the section with the grouped control shows with the Copy icon. After the first user has completed that section, each additional user can click the **Copy** icon and complete the section.

You can now define a dynamic section for a checklist. A dynamic section lets the entire set of controls in the section be copied multiple times, so project participants can enter relevant information, such as attachments for each action related to the checklist, as many times as applicable.

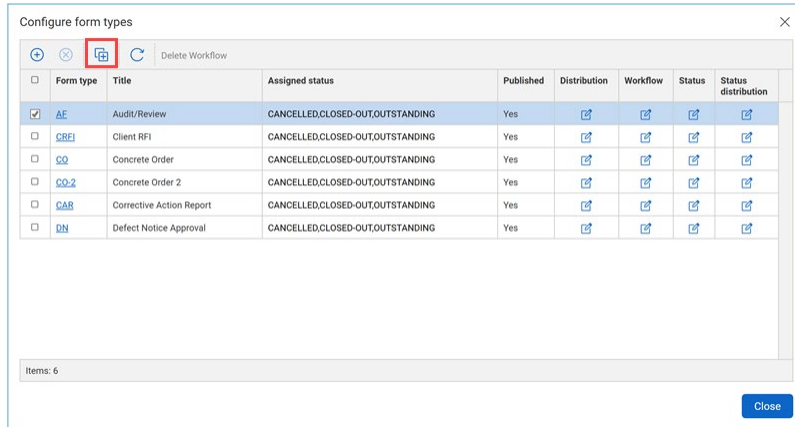
To duplicate a section, click the **Copy** icon.



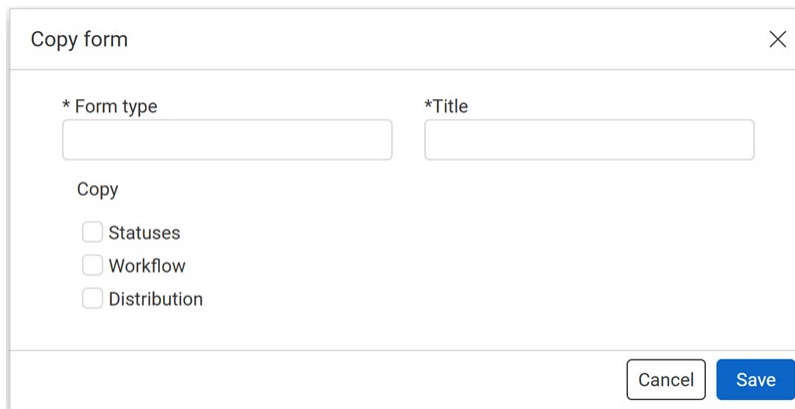
Forms

Duplicate form type

The Copy icon has been added to the Form builder (Forms > Actions > Admin > **Configure form types**). To duplicate a form type, select it, and then click the **Copy** icon.



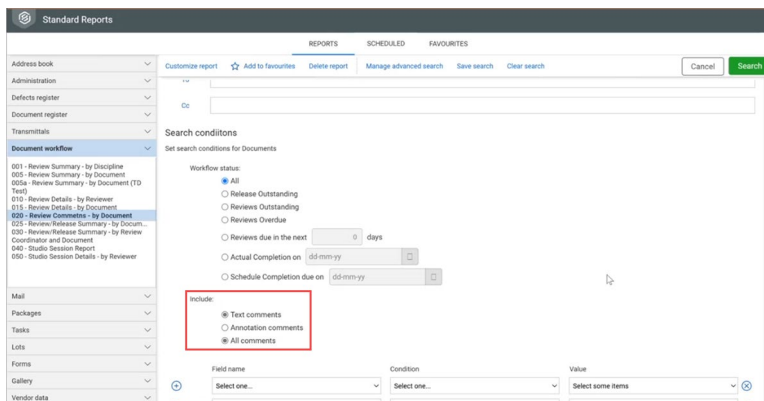
The Copy form dialog box opens, where you can enter the form type and title and indicate whether to copy statuses, workflow, and distribution.



Reports

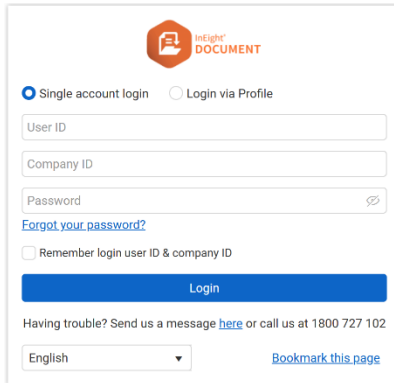
Review Comments report comment type filters

Now, you can select filters in the Include section when you run the report.



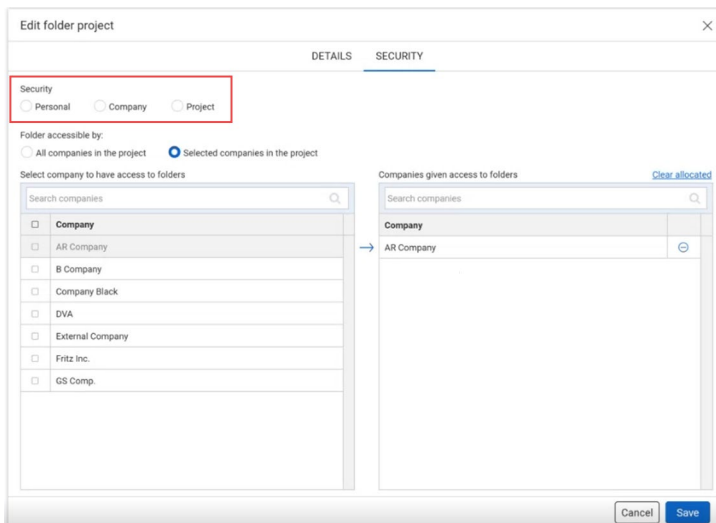
General

Updated Sign-in page



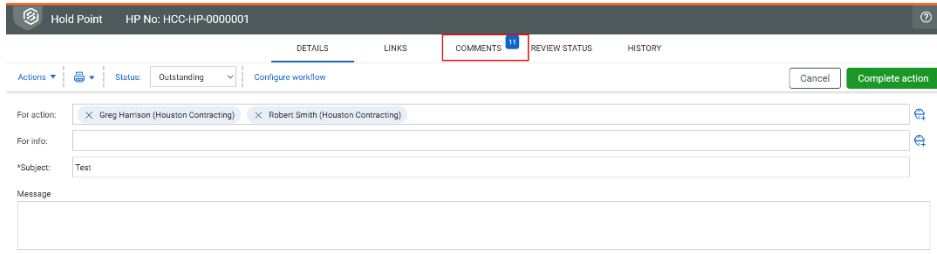
Assign folder access based on company

The Security options have been moved from the Details tab to the new Security tab. The Add folder and Edit folder dialog boxes now include the Security tab.



When you select the **Project** security setting, you can then select whether the folder is accessible by all companies in the project or selected companies in the project. The setting is defined at the parent folder level and cannot be different in child folders.

Details tab item count



The screenshot shows a software interface for a 'Hold Point' with ID 'HCC-HP-000001'. The 'COMMENTS' tab is active, showing a list of items for action. The interface includes a top navigation bar with tabs for 'DETAILS', 'LINKS', 'COMMENTS', 'REVIEW STATUS', and 'HISTORY'. Below the navigation bar, there is a 'Status' dropdown menu set to 'Outstanding' and a 'Configure workflow' button. The main content area displays a list of items for action, with two items selected: 'Greg Harrison (Houston Contracting)' and 'Robert Smith (Houston Contracting)'. The 'Subject' field is set to 'Test'. There are 'Cancel' and 'Complete action' buttons at the bottom right of the form.