INEIGHT

Document Enhanced UI 26.7 Release Notes

DOCUMENT

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	30-JUL-2026	Initial Release
1.1	06-AUG-2026	Clarifies new report Transmittal Review Report - By Document Details.
1.2	13-AUG-2026	Interim release date clarification for Import comment sheet and Add dynamic sections to forms enhancements

Contents

What's new in Document 26.7

Web Release Notes

- **Getting started**
  - **Sort register view lists** – A new general user preference, Sort views, lets you set the default to sort alphabetically or by last used. Previously, view lists were only sorted by most recently used. Read more
- **Documents**
  - **Import and export comment sheet** – You can now download a project comment sheet template, so you can add new comments or responses in bulk. You can then import the comment sheet back into the project, and the comments will be added to the listed documents. Contact your InEight representative for information about activating this feature. This feature will be available in the 26.7.02 interim release. Read more
  - **Tool chest item preview** – When you select a stamp or other annotation from the Tool Chest, a live preview shows before placement, making positioning more accurate. Read more
  - **Border style preview in tool chest –** The tool chest now shows a more accurate representation of the borders of custom markup tools.
  - **PDF viewer page navigation** – Page navigation is now available from the Markup and Favorites tabs of the PDF viewer, so you can quickly go from page to page without having to return to the Viewing tools tab.
  - **Attachment indicator in PDF viewer Comments pane** – The Attachments indicator now shows in the Comments pane when a comment has an attachment. Previously, attachment indicators only showed on the Comments tab. Read more
  - **Markup responses in PDF downloads** – Text responses to markups are now included when you download a PDF with annotations.
  - **Updated options from Send comments drop-down list** – The Originator option has been removed from the Send comments drop- down list in the Release page as the originator receives this information on the released documents notification.
- **Checklists**
  - **Define checklist distribution groups** – You can now define distribution groups for checklists. Read more
  - **System actions and Attachment controls in dynamic sections** – You can now add System action and Attachment controls to dynamic sections in the Checklist builder. Previously, these controls were not available to dynamic sections.

- **Duplicate checklists** – You can now duplicate a checklist. The duplicate copies all data in a checklist to a new one. Read more

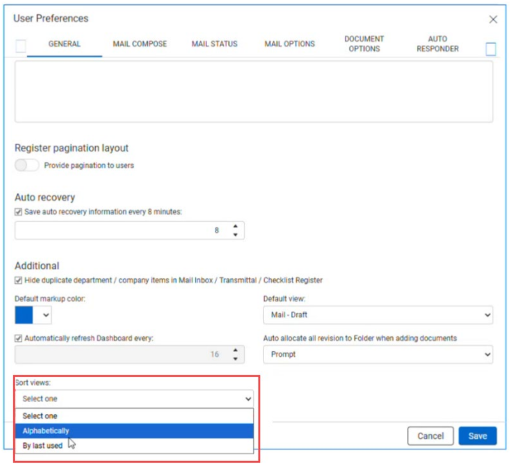
- **Administration**
  - **Define date format for projects** – You can now define the date format for a project. The new Project settings > General > **Project date format** lets you set the format (for example DD-MM-YY) that is used. Previously, the date format was adjusted on request by InEight.
  - **Manage contact groups at the security group level** – You can now assign contact group management through security groups, letting you set access at a personal, company, or project level and allowing the creation or deletion of contact groups at these levels. Read more
  - **Project-level dashboard views** – Dashboard views can now be shared at the project level, in addition to existing personal and company-level options. Read more
  - **eSignature status visibility** – You can now configure who has access to view the signature status of documents through the company Integration tab settings. Previously, only the initiator or a signee of the document could view the status. Read more
  - **Free form review teams support roles** – You can now assign roles in free form review teams in addition to named users for review coordinators and reviewers. Read more
  - **Contact group selected item counts** – The selected item count and the Clear selection and View selected options have been added to the footer of the Details page. Read more
  - **Batch welcome notifications in Central user management** – When you add a user to a security group for multiple projects in Central user management, Document now sends a single welcome notification with a list of all projects. Previously, Document sent separate notifications for each project. Any customized notifications are not impacted.
- **Transmittals**
  - **Document list in transmittal review notification** – The notification Transmittal Issued for Review now includes a list of documents in the transmittal. The list shows the document numbers and titles.
- **Packages**
  - **Upload documents during package creation** – You can now upload documents directly from a package, so you can create a package in one step. Read more
  - **Package PDF viewer navigation** – The PDF viewer within the package now includes Previous and Next buttons.

- **Forms**
  - **Add dynamic sections to forms** – The Dynamic section type has been added to the Form builder, which automatically duplicates a section for each For action user. The duplicate sections give each For action user the responsibility of completing the section. This feature will be available in the 26.7.02 interim release. Read more
  - **Remove attachments uploaded by others** – A new project setting lets authorized users remove attachments uploaded by other users within form sections. Read more
  - **Mark up PDF attachments** – You can now create and view PDF markups directly on form attachments using the PDF viewer. Read more
  - **Customize Submittals section in the Form builder** – The Form builder now lets you customize which columns show in Submittal sections rather than using a fixed set of fields. Read more
- **Submittals**
  - **Define Issued to company for self-perform submittals** – When you create a self-perform submittal, the Issued to company fields are now enabled, so you can enter information for tracking purposes. No submittal is issued, and you cannot upload deliverables against it.
- **Reports**
  - **Contact Group report modification** – You can now sort the Contact Group report (01.100) by recipient, so you can quickly see which groups a contact belongs to. The report also now shows when the user was added, who added them, and from which company
  - **New Pending Transmittals by Company report** – A new report, Pending Transmittals by Company Access (05.031), provides company-level visibility into pending transmittals. Read more
  - **Transmittal Review Report - By Document Details** – A new report, Transmittal Review Report – By Document Details (05.070), has been added to show document details for transmittals that have been sent for review.
  - **Role Detail report –** A new report for Role Detail has been added to provide visibility to changes to role memberships, when the changes were made, and who made the change.

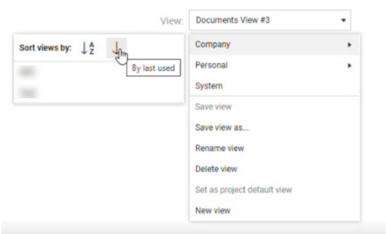
Web release notes

Getting started

Sort register view lists



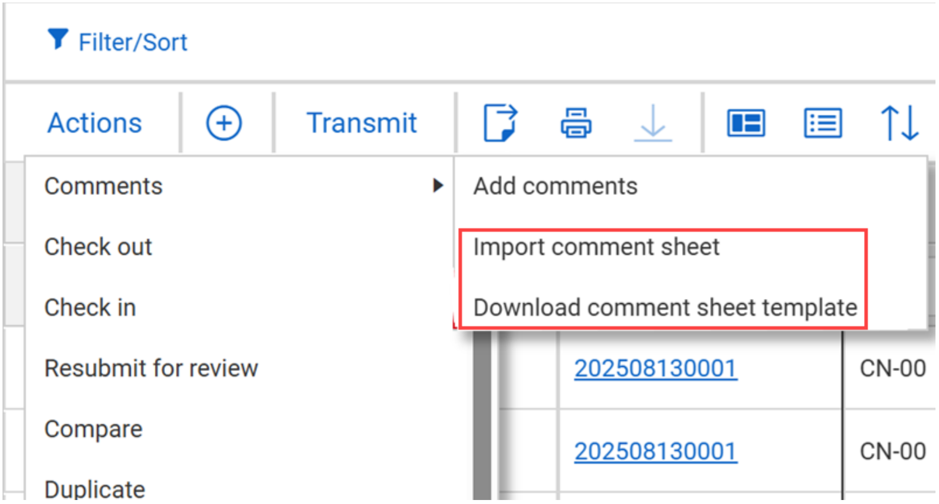
When you expand the View list on a register, the view sorts to your preference, and you have the option to change the sort order.



Documents

Import and export comment sheet

To download the comments template, go to Actions > Comments > **Download comment sheet template**.

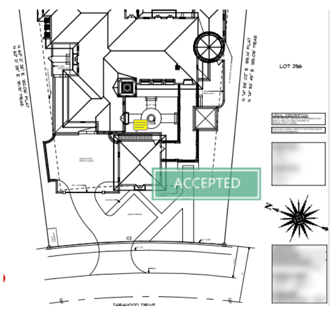


If your project has an existing customized comment sheet, that template is downloaded.

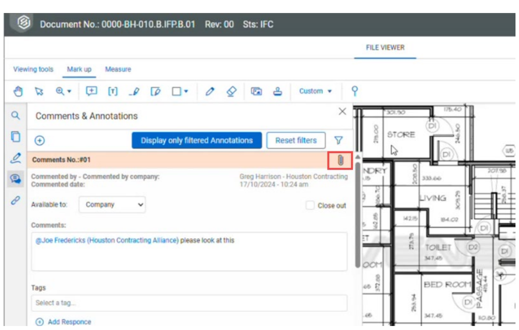
After the template is downloaded, you can enter the document number and other identifying information and then add your comments. You can then import the comment sheet (Actions > Comments > **Import comment sheet**) into Document.

Tool chest item preview

When you select an item from the viewer's tool chest, the preview of the annotation shows, giving you clear visibility into the location of the annotation.



Attachment indicator in PDF viewer Comments pane



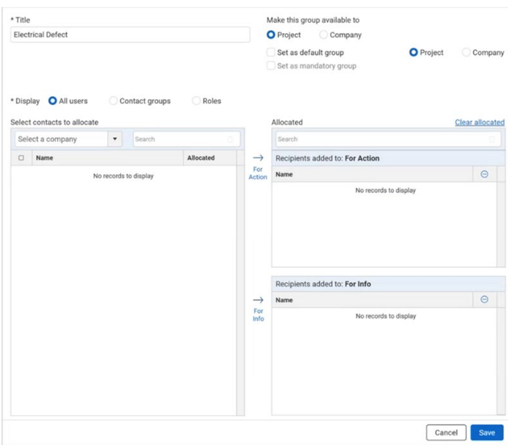
When a comment has an associated attachment, the icon shows in the Comments pane. Click the **Attachments** icon to download the attachment.

Checklists

Define checklist distribution groups

The Distribution column 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 at what level the group is available 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 them to the checklist.

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

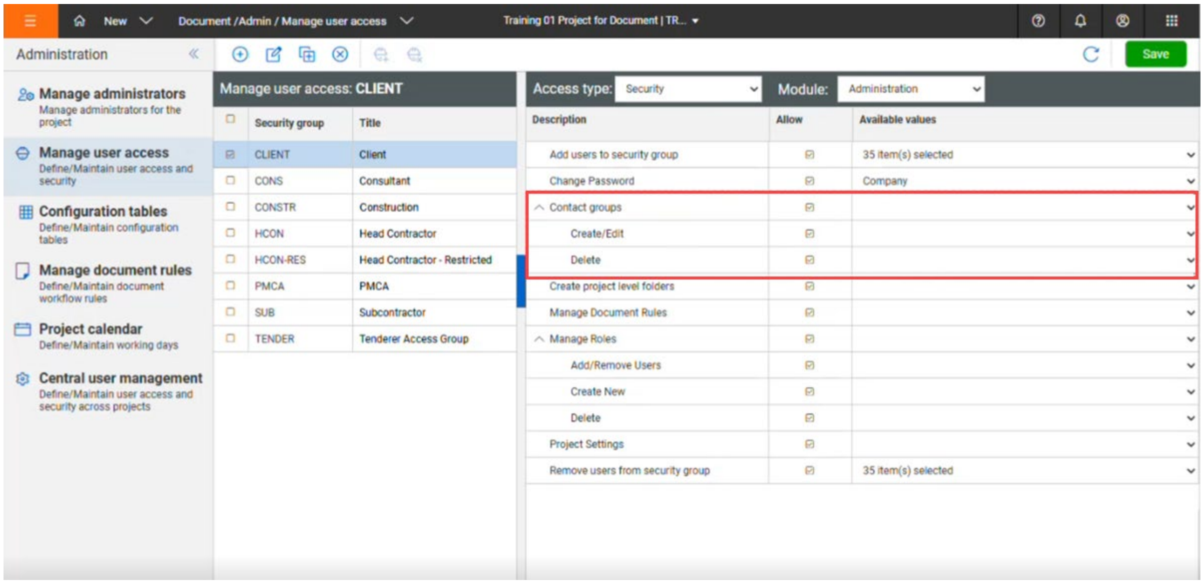
Duplicate checklists

The Duplicate action has been added to the Actions menu on the Checklist register and the checklist Details page. After you select Actions > **Duplicate**, the checklist is duplicated with all data copied. You can then make modifications as needed before issuing the new checklist.

Administration

Manage contact groups at the security group level

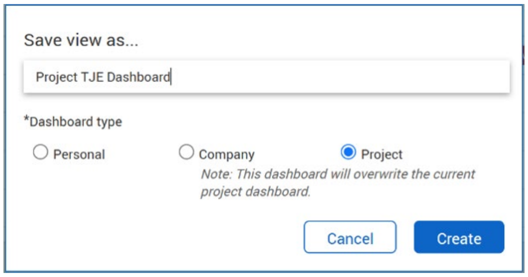
Contact groups have been added to Manage user access > Security > **Administration** for each security group.



You can select options to specify whether members of the security group can create and edit or delete contact groups.

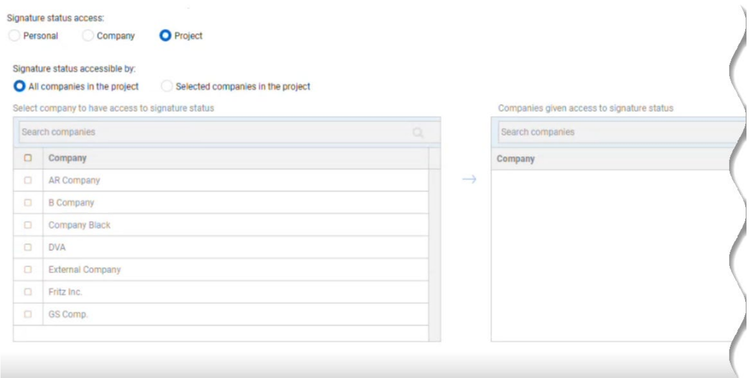
Project-level dashboard views

The Save view as dialog box that shows when you create a new view now includes the Project option, so that you can make the view available to everyone on the project.



eSignature status visibility

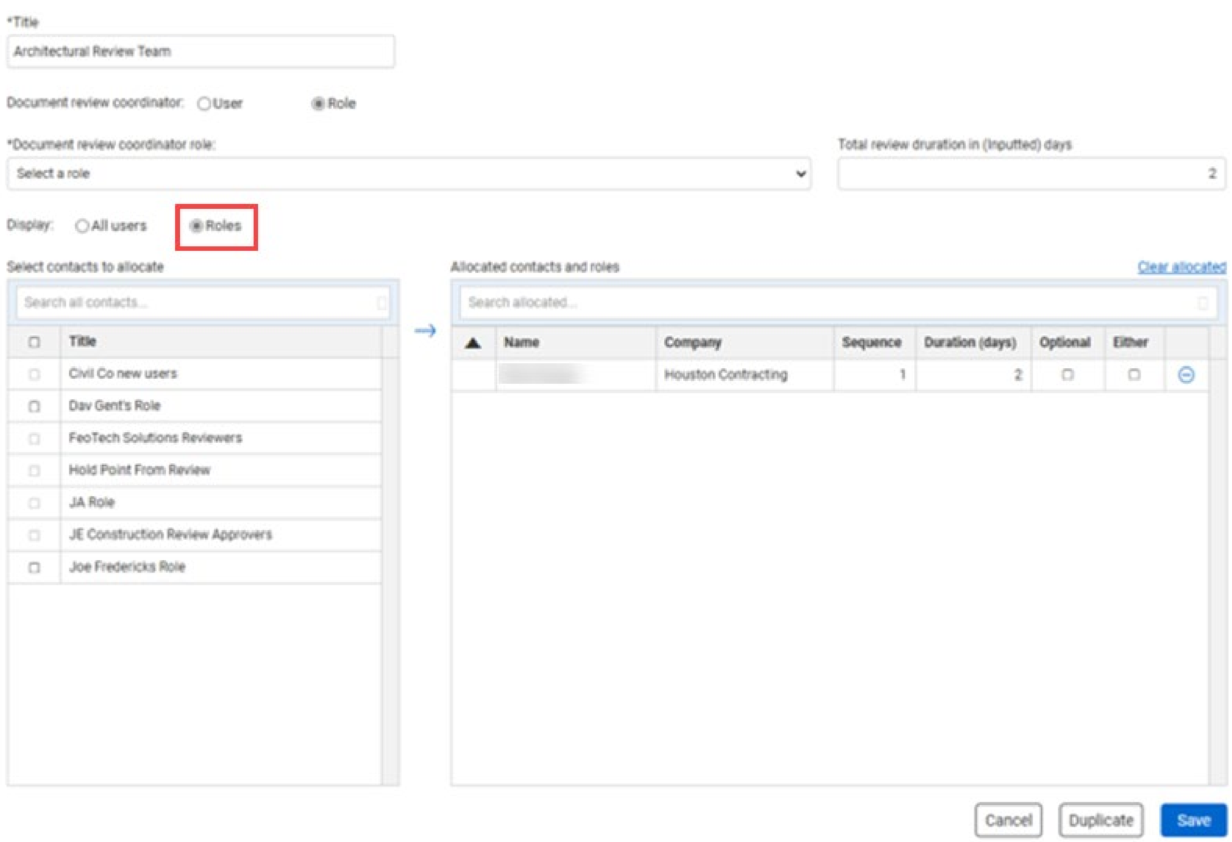
The new Address book > Companies > External integrations > **Signature status access** setting lets you specify whether signature status access is personal, by company, or by project. If you select **Company** or **Project**, you can also specify whether all users or companies in the project can accesses the status or only selected users or companies.



Those with signature status access can view the access in the Signature status column in the Documents register, the Signature status tab in the document and through Actions > **View signature status**.

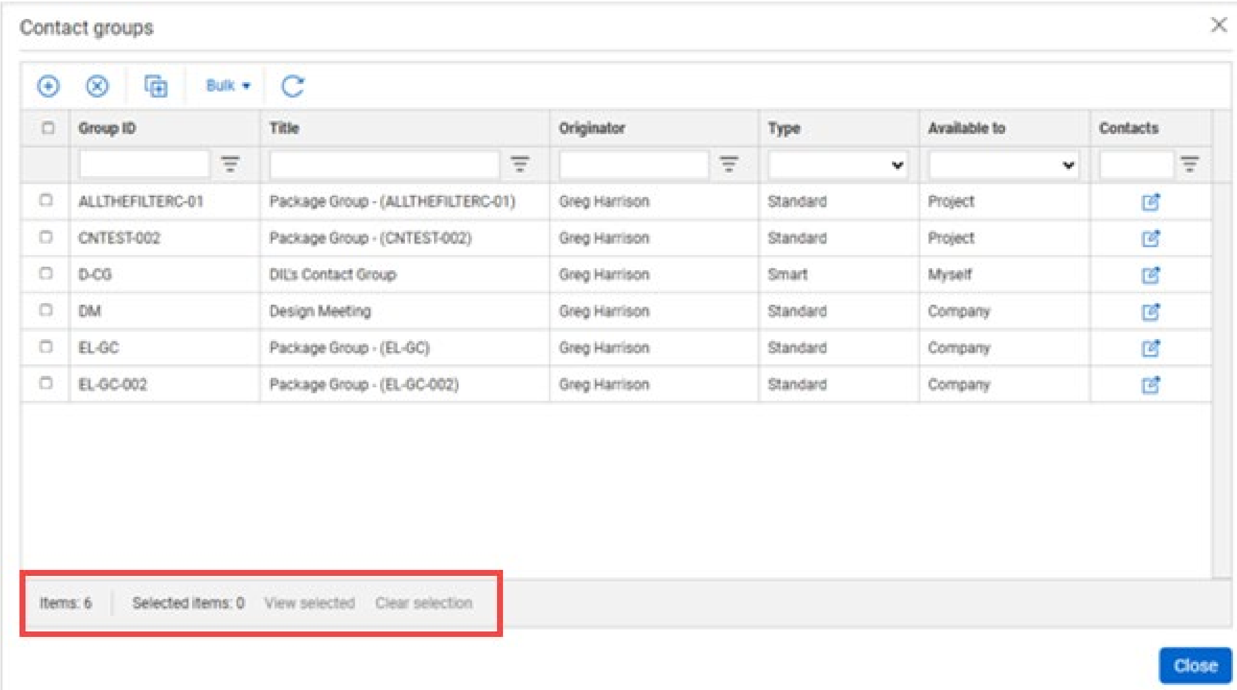
Free form review teams support roles

The Roles option has been added to the Edit free form review team dialog box.



When the Roles option is selected, you can select from existing roles on the project.

Contact group selected item counts

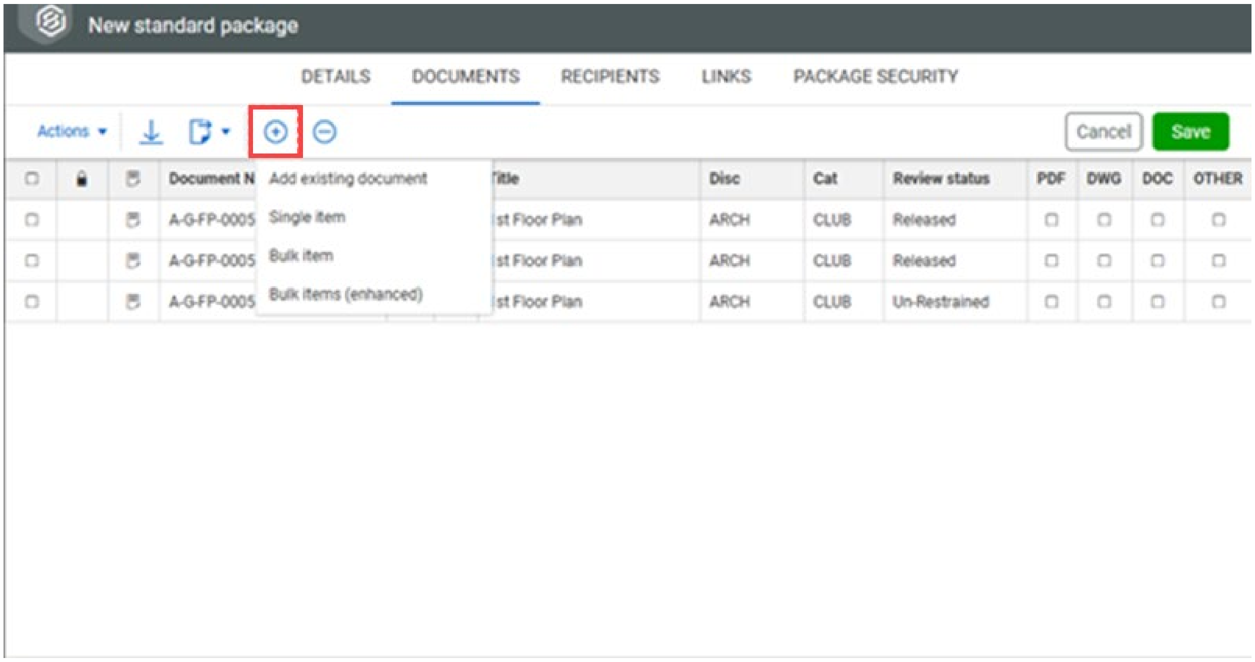


Packages

Upload documents during package creation

You can select options to add existing documents, a single item, and bulk items have been added to the Add icon

You can then upload documents from the package's Documents tab by clicking the **Add** icon, and then selecting from the options.

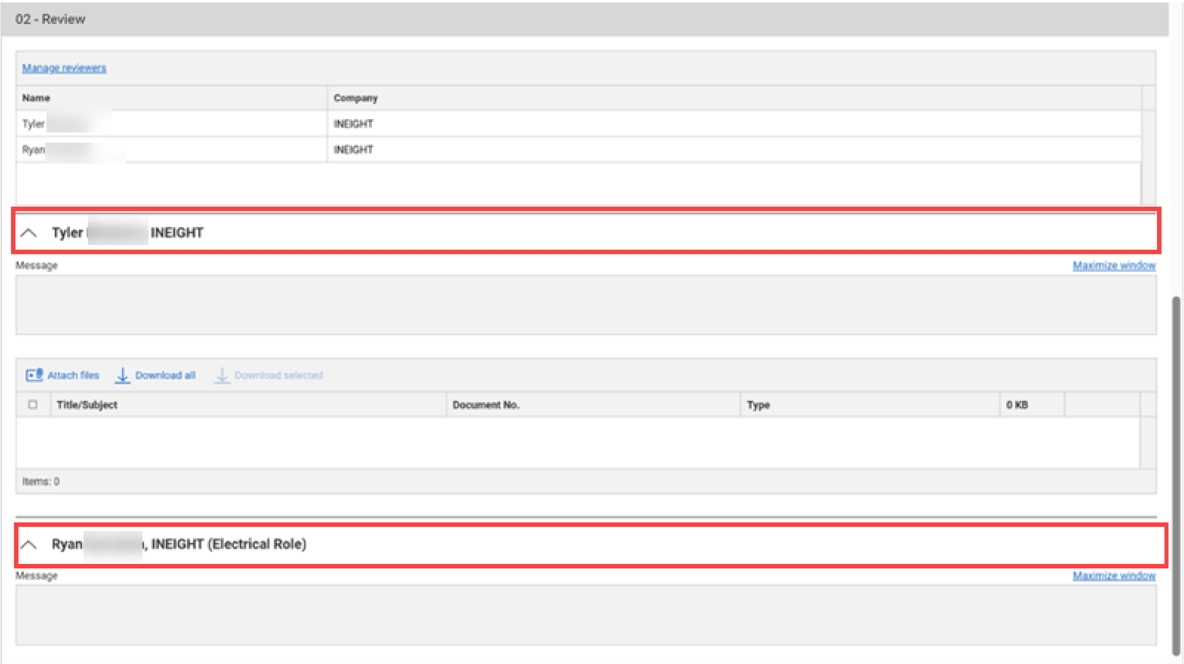


Uploaded documents are added to the document register and linked to the package automatically.

Forms

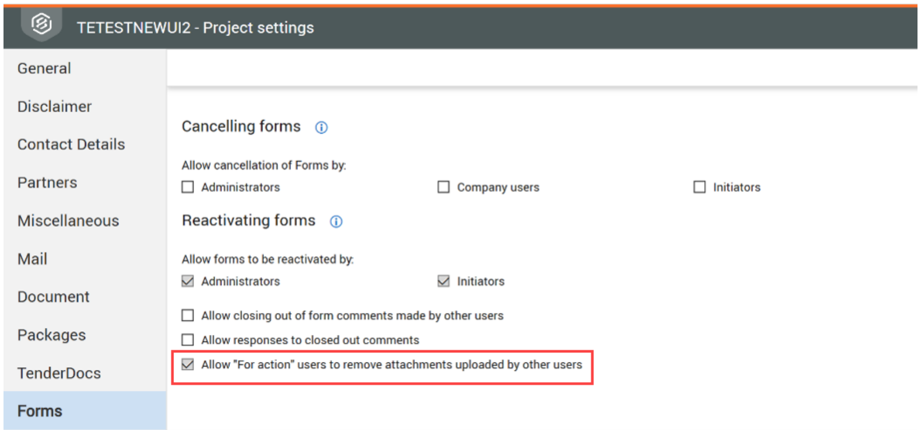
Add dynamic sections to forms

The Dynamic layout type has been added to the Form builder components. To add a dynamic section to a form type, drag the Dynamic layout type to the form, enter the dynamic details, and add the required controls. When you create a form from the form type, Document creates a section for each For action user that only that user can edit.



Remove attachments uploaded by others

Previously, only the person who uploaded the attachment could remove it. The new Project settings > Forms > A**llow "For action" users to remove attachments uploaded by other users setting** lets the users listed in the For action field remove attachments.

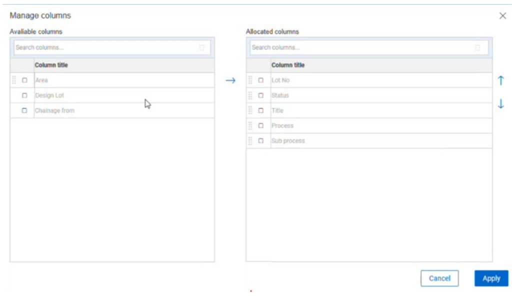


Mark up PDF attachments

The PDF viewer that opens when you open form attachment now includes the Markup tools. Markups are saved to the attachment, and any other user who has access to the attachment can view them.

Customize Submittals section in the Form builder

The Manage columns option has been added to the details panel for Submittals sections in the form builder. Click the link to open the Manage columns dialog box.



You can then choose the columns you want to show and their order.

Reports

New Pending Transmittals by Company report

An existing report, Pending - by Company (05.030) shows all companies that need to be sent a transmittal regardless of whether a recipient in the company has received the transmittal. A company would show on the report until all recipients were issued updates. Now, the Pending Transmittals by Company report shows you only the companies where no one has received a transmittal. After one recipient from a company receives a transmittal, that company is no longer considered pending in the company-level report.