INEIGHT

Document 25.1 Enhanced UI
Release Notes

InEight®
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	20-FEB-2025	Initial Release

Contents

What's new in Document 25.1

Web Release Notes

- **Documents**

    - **Custom tool chest** – You can now create a library of custom stamps and annotations in the PDF viewer. The custom stamps and annotations are stored in a tool chest at the personal, company, or project level. [Read more](#)

    - **Automatically load document markups** – When multiple users are marking up a document in the PDF viewer at the same time, you can now see the other users' markups in real time. Being able to view markups in real-time helps avoid duplication errors. [Read more](#)

    - **Review coordinators edit annotations from other reviewers** – You can now give review coordinators the ability to edit comments and markups from other reviewers before release. Being able to edit all annotations gives review coordinators the opportunity to fix mistakes before releasing a document. [Read more](#)

    - **Assign documents to the current standard folder during upload** – You can now select a standard folder before uploading documents, and the documents are automatically uploaded to that folder. Previously, automatic upload to a folder was only available with smart or dynamic folders.

    - **Filter on latest transmittal number** – You can now filter the Latest transmittal number column in the Documents register to help you locate documents quickly.

- **Mail**

    - **Mark mail as read or unread at the company level** – You can now mark mail at the company level and the mail item shows as *Read* or U*nread* for the entire company. Previously, when you marked mail as read or unread at the company level, it did not show for the entire company.

    - **Default text inputs at the mail type level** – You can now define a default text input based on the mail type. The default text input shows in the Text input field of the mail details. [Read more](#)

    - **Default attributes for custom fields** – Default attributes for custom fields, such as those for TenderDocs, now show in the Project Mail Default Attributes dialog box. [Read more](#)

- **Transmittals**

    - **Default text inputs at the transmittal type level** – You can now define a default text input based on the transmittal type. The default text input shows in the Text input box of the transmittal details. [Read more](#)

- **Administration**

  - **Select multiple values when defining Distribution and Review document rules** – You can now select multiple values when defining the Distribution and Review (Y/N) document rules. Previously, you could only select one value per rule, so you had to create new rules for each value selected.

- **Forms**

  - **Form builder functions in enhanced UI** – The Form builder function is now entirely inside the Document Enhanced UI application. Previously, the form builder tools were in the Classic application. Drag and drop functionality is now part of the enhanced UI Form builder.

  - **Attachments indicator added to Forms register** – You can now quickly see which forms have attachments associated. An attachment icon, like the attachment icon on other modules, has been added to the Forms register.

- **Submittals**

  - **Form number added to Submittals register** – The form number column has been added to the Submittals register, so you can quickly see the forms that are linked to a submittal. Form numbers show as text in the column.

- **Checklists**

  - **Change ownership of a checklist** – You can now transfer ownership of a checklist to another user. The Transfer checklist ownership option has been added to the Actions menu on the Checklists register. Read more

  - **Display attached photos as thumbnails in exported checklists** – A new customization embeds attached photos as thumbnails when you export a checklist. Without this customization, an attached photo shows as a file name. For information about this customization, contact your InEight representative.

  - **Update ID when importing a checklist** – When you import a checklist from another project, you can now update the checklist ID and title before saving, so you can use identifiers that are meaningful to your project. Read more

  - **Due date field added to the Checklists Mandatory fields configuration table** – You can now mark the Due date field mandatory or optional in a checklist in the Checklists Mandatory fields configuration table.

- **Enhanced UI**

  - **Rich text support** – You can now highlight rich text, so you can apply formatting. Rich text is available in mail, transmittals, forms and configuration table for text inputs.

Documents

Custom tool chest

To create a tool chest item, select the annotations (for example a box and an arrow in your markup), right-click, and then select **Add to Tool Chest**. You can then name your custom tool, assign a category, and make it available for personal, project, or company use. The grouped annotations are saved as a single annotation in the tool chest.

The Tool Chest button has been added to the Markup toolbar. To use a custom annotation, click the **Tool Chest** button, and then select the annotation.
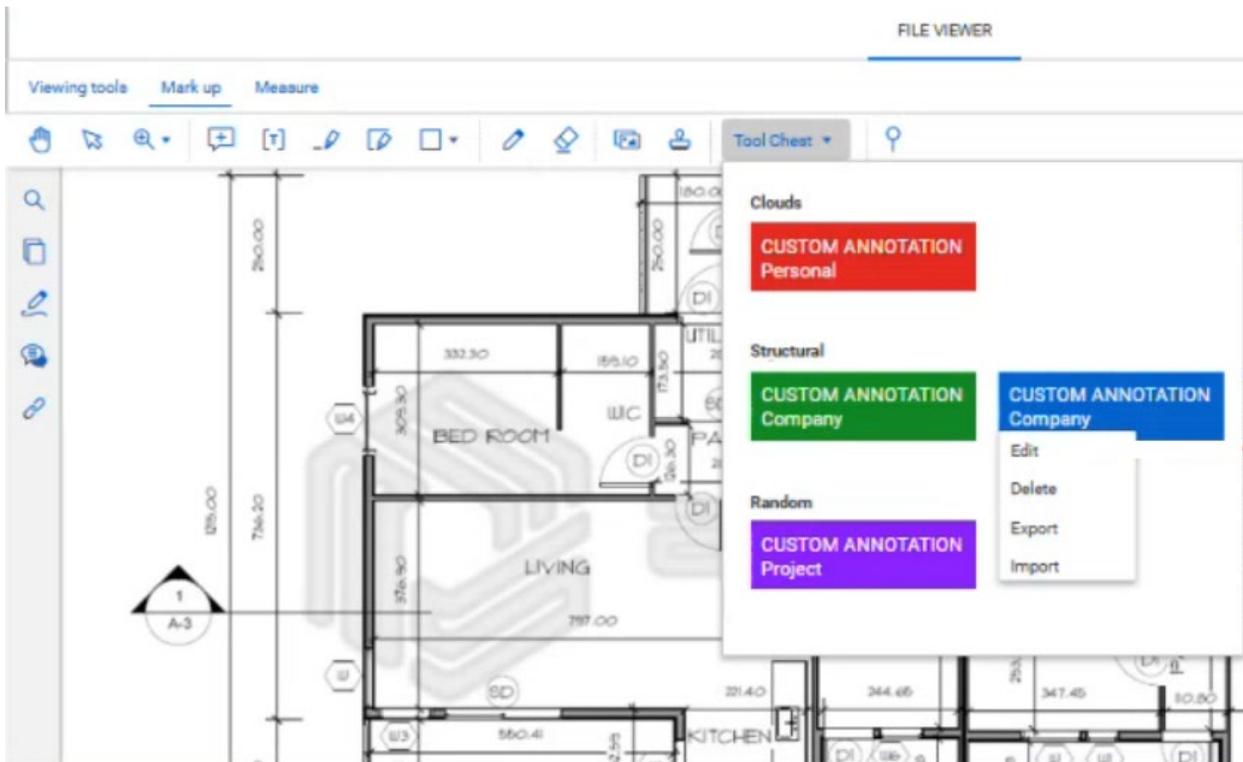
You can also import and export tool chest items between projects.

The Manage Tool Chest security setting has been added to security groups. The setting must be enabled for your security group to share, import, and export items in the tool chest.

Automatically load document markups

A new project setting, Project settings > Document > Comments > **Auto load document markups**, must be selected to enable auto loading markups in real time.
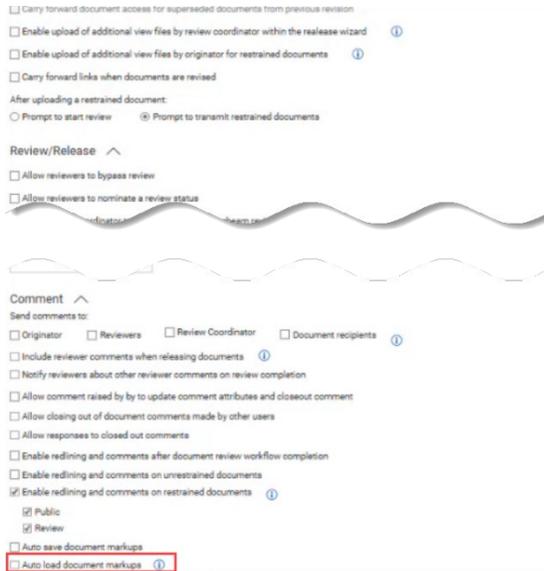

Review coordinators can edit annotations from other reviewers

The setting Enable editing of redlines and of comments before release has been added to the Comment section of the Document project settings. You must select the setting to enable review coordinators to edit annotations made by other reviewers.

Mail

Default text inputs at the mail type level

The Default Text Input column has been added to the Configure Mail Workflow dialog box (Mail > Inbox | Drafts | Sent items > Actions > Admin > **Configure mail workflow**).
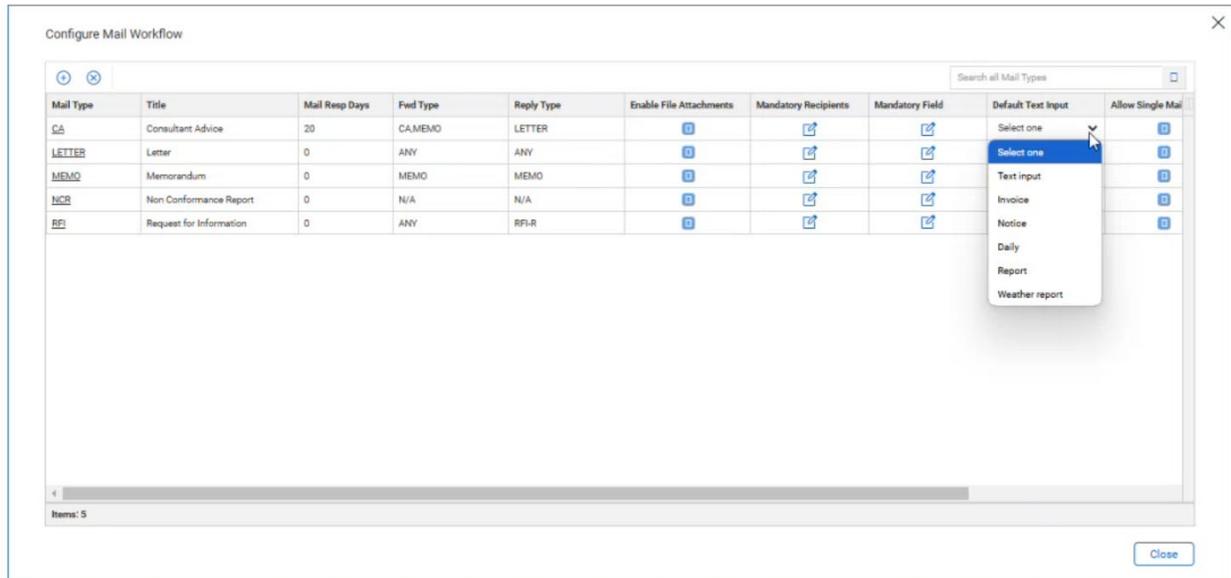
You can update the value in the Text input field when you create mail, if needed.

Default attributes for custom fields

When you click the **Define Attribute Values** link in the Configure Mail Workflow dialog box, the project mail default attributes now include any custom mandatory fields you have in your project.

Transmittals

Default text inputs at the transmittal type level

The Default Text Input column has been added to the Configure Transmittal Workflow dialog box (Transmittal > Inbox | Drafts | Sent items > Actions > Admin > **Configure transmittal workflow**).

You can update the value in the Text input field when you create a transmittal, if needed.

Checklists

Change ownership of a checklist

To change ownership of a checklist from the Checklist register, select the checklist, expand the **Actions** menu, and then select **Transfer checklist ownership**. You can also change the ownership of the checklist from inside the checklist by expanding the **Actions** menu and then selecting **Transfer checklist ownership**.

The Transfer Ownership option has been added to the Security access type of the Checklist module. You must be a member of a security group that has this option enabled to transfer ownership of a checklist.

Update ID when importing a checklist

The Import Checklist Type dialog box has been updated to include the Import as ID and Import as Title columns. You can use the columns to specify a new ID or title for the imported checklist. If the columns are blank, Document uses the existing ID or title.