Document Enhanced UI 25.5 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	29-MAY-2025	Initial Release
2.0	06-JUN-2025	Removes the Forms module dynamic table enhancement

Contents

What's new in Document 25.5

Web Release Notes

- **Documents**
    - **Mention users in comments** – In the document comments, you can now use the @ symbol to mention a user in the comments. Comments must be in rich text to use this feature. Read more
    - **Lock documents for a user after they complete their review** – A new setting in Project settings > Document > Comment > **Enable additional redlining and comments after review completion** lets you prevent users from making additional comments after they have completed their reviews. Read more
    - **Enhanced upload in Holding Area** – The enhanced bulk upload interface is now available in the Holding Area.
    - **eSignature Reject signature support –** Document now supports the process of rejecting signatures through the eSignature integration. Read more
    - **New security setting for editing other users' markups** – The new security group setting Edit Other Users Markup (Admin > Manage user access > Security > **Document**) lets you give users the ability to edit other users' markups. Now, if a user leaves a project, you can edit their markups if the setting is enabled for your security group.
    - **Prompt for commenting in reviews** – You can now enable personal reminders when you complete a review without adding a comment or redline. Read more
- **Submittals**
    - **Submittal workflow** – You can now add a workflow for submittals. Having a workflow lets you define stages that help you manage the submittal review process. Now, with the submittal workflow, you can send the entire submittal and have the flexibility to comment on each document or the submittal itself. Read more
    - **Set default attributes at the submittal type level** – You can now define attributes for a submittal type instead of defining them each time you create a submittal. Read more
    - **Issue submittal with automatic saving** – Submittals can now be issued without having to save first. Now, when you are ready to issue a submittal, you can click **Issue**, and the submittal is automatically saved and then issued.
    - **Optional message field** – The message field can be made optional when issuing or submitting the submittal. The option can be controlled in the Mandatory Fields configuration table.

- **Issue to user upload** – If there is only a single value available for a user from the issued to company, the user now defaults to that value when uploading documents.

- **Administration**
    - **Create project-level folders** – A new security setting Create project level folders was added that lets you enable users in a security group to create folders at the project level. Read more
    - **Restrict or allow IP addresses to access Document** – IP addresses can now be defined to control either allowing or denying access to the InEight Document project via a new project setting. Read more
- **Checklists**
    - **Predefined attachments for checklists** – You can now add a predefined attachment, such as a template to be completed later, to a checklist. When you add a predefined checklist, the user that completes the checklist can quickly download the file instead of having to search for it. Read more
    - **Link to an existing item in a checklist** – A new system action lets you link an existing form or mail item to a checklist. Previously, if you wanted to link an item to a checklist, you had to create a new item. Read more
    - **Multiple-line field labels** – To help with readability, labels in a checklist can now have multiple lines. Previously, checklist labels could only have one line.
    - **Rich text in field labels** – When you use labels for section headers or question text, you can now use rich text. Rich text lets you apply formatting, such as bold text or underlining to customize the look of the checklist.
- **Transmittals**
    - **Control annotations on a download** – The sender of a transmittal can now force recipients to download annotations, so important markups are not missed. Previously, it was always the choice of the recipient to download annotations. Read more
    - **Warning when issuing to external contacts** – The sender of the transmittal now receives a warning if one or more of the recipients is not set up as users and the project requires each person to sign in to access documents.
- **Forms**
    - **Rearrange standard fields** – The form builder now supports the ability to rearrange the Discipline, Location, and Area form fields.
- **APIs**
    - **Submittal module** – The submittal module APIs are now available.

- **List Document Review API filters** – The List Document Review call now supports the use of filters with basic fields. Previously filters were only used with last edited date.

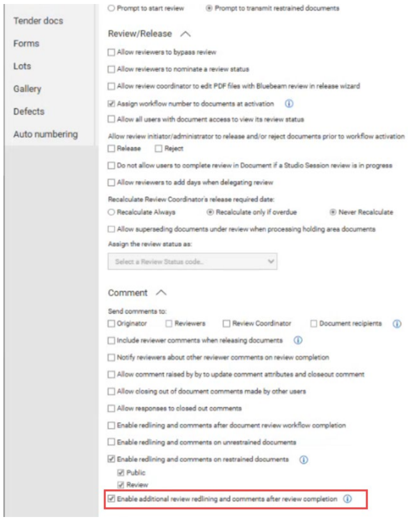
Documents

Mention users in comments

After the comment is saved, the user receives a notification of the mention, so they can quickly see when an action is required on a comment. The notification shows the location of the comment and the comment text.

The Mention column has been added to the Documents register, so you can filter documents based on your name being mentioned. You can also filter by mention on the Comments page.

Lock comments for a user after they have completed their review



To lock documents, deselect the **Enable additional redlining and comments after review completion** setting.

eSignature Reject signature support

If a user rejects the signature, the signature status of the documents sent for signature now show as *Rejected* in the Signature Status tab and Document register. If a user rejects the signature, their Signee status now shows as *Rejected*. For the remaining signees who will not be able to sign, their Signee status is blank.

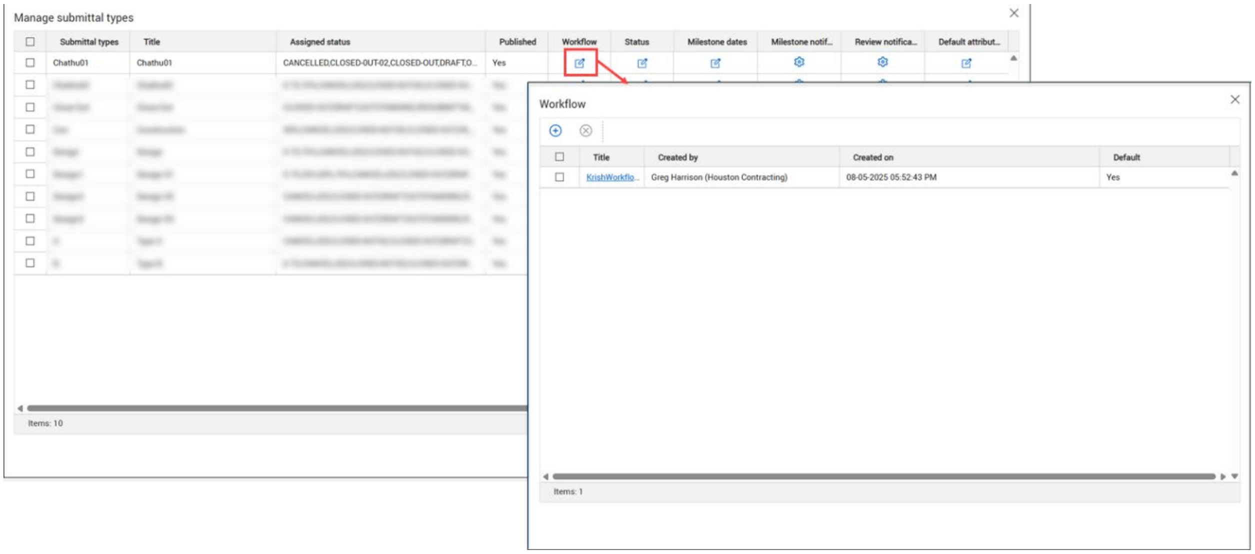
Prompt for commenting in reviews

The check box Remind me to add comments/redlines when completing a review has been added to the Document options tab of User Preferences. When the box is selected, you are prompted to add a comment or redline when you complete a review without adding feedback.

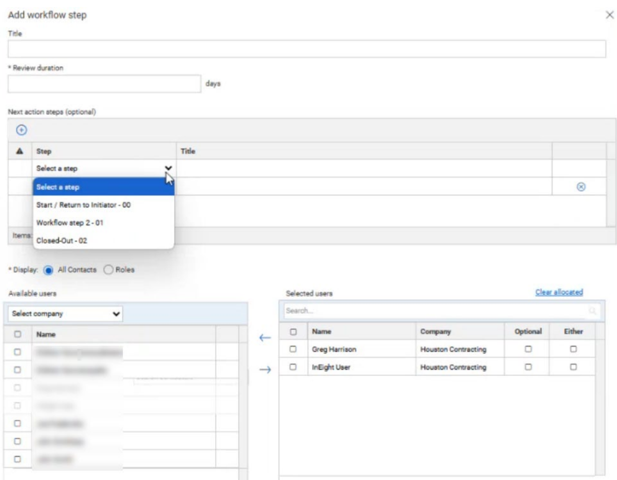
Submittals

Submittal workflow

The Manage submittal types dialog box now includes the Workflow column. Click the **Edit** icon to add workflows for the submittal type.

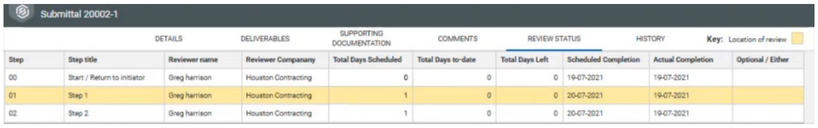


After you click the **Add** icon, you can configure the steps in the Workflow steps dialog box. For each step you add to the workflow, you can click a **Configure** icon to define the title, duration, next action, and to select reviewers and indicate whether they are optional or mandatory.



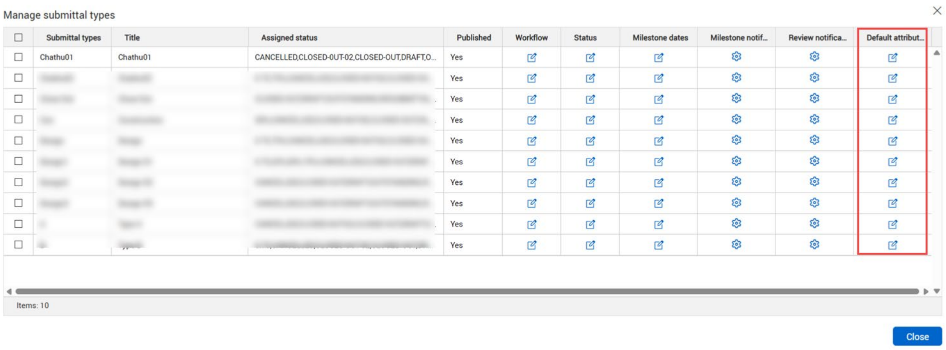
The Review status column has been added to the Submittals register, so you can quickly see if the review is awaiting action or is complete.

A Review Status tab has also been added to the submittal, so you can view more details about the review, including the step the review is in, the reviewer name and company, the total number of days scheduled, days left, and completion dates.

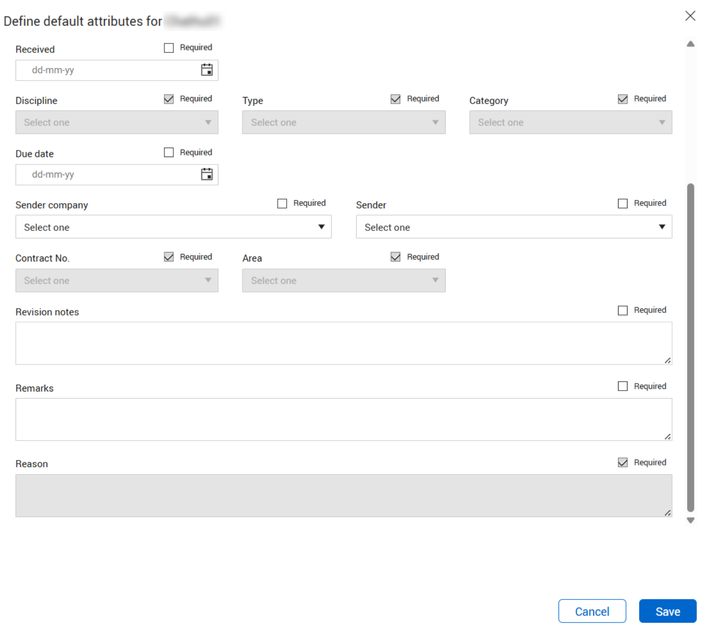


Set default attributes at the submittal type level

The Default attributes column has been added to the Manage submittal types dialog box (Actions > Admin >**Manage submittal types**).



To set default attributes, click the **Edit** icon in the Default attributes column for the submittal type. A Default attributes dialog box opens, which is like the dialog box used when defining default attributes for a single submittal.



You can add the attributes, and then click **Save**.

After the attributes have been defined, they are used for submittals of that type. You can change the attributes for the submittal as needed.

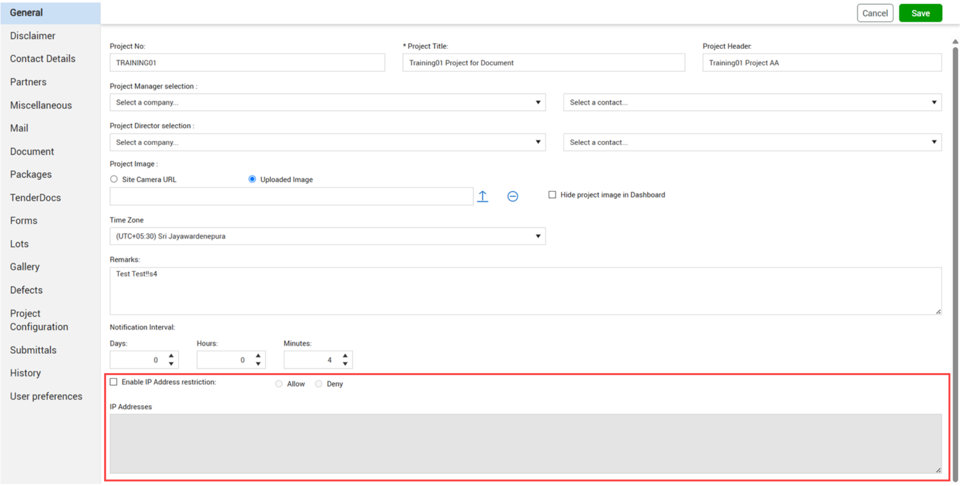
Administration

Create project-level folders

When the security group setting Create project level folders (Manage user access > Access type: Security > **Module Administration**) is enabled, members of the security group can create project folders. Previously, only administrators could create project-level folders.

Restrict or allow IP addresses to access Document

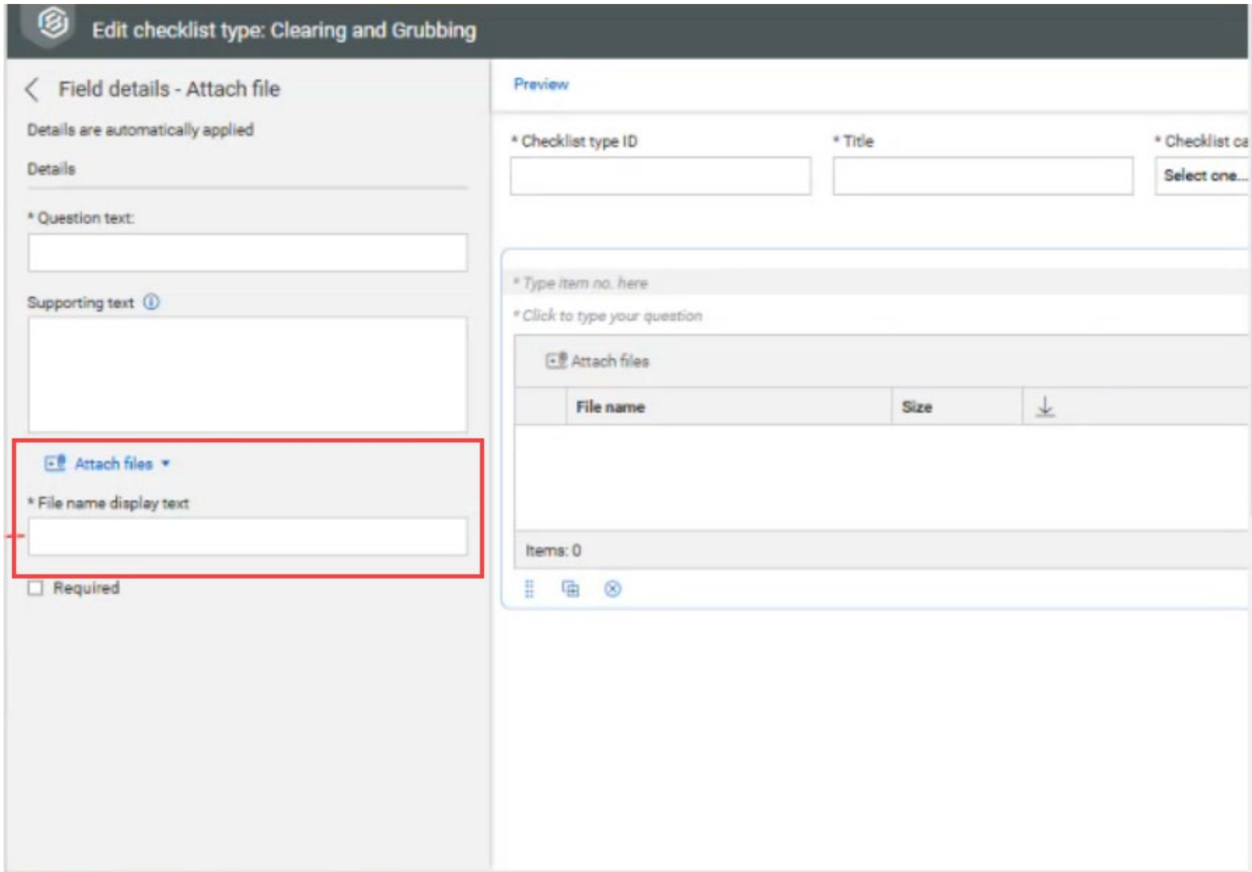
The new project setting Enable IP Address restriction (Project Settings > **General**) lets you specify whether to restrict IP addresses. To restrict IP addresses, select the **Enable IP Address restriction** check box, and then choose either *Allow* or *Deny*. You can then enter the allowed or denied IP addresses.



Checklists

Predefined attachments for checklists

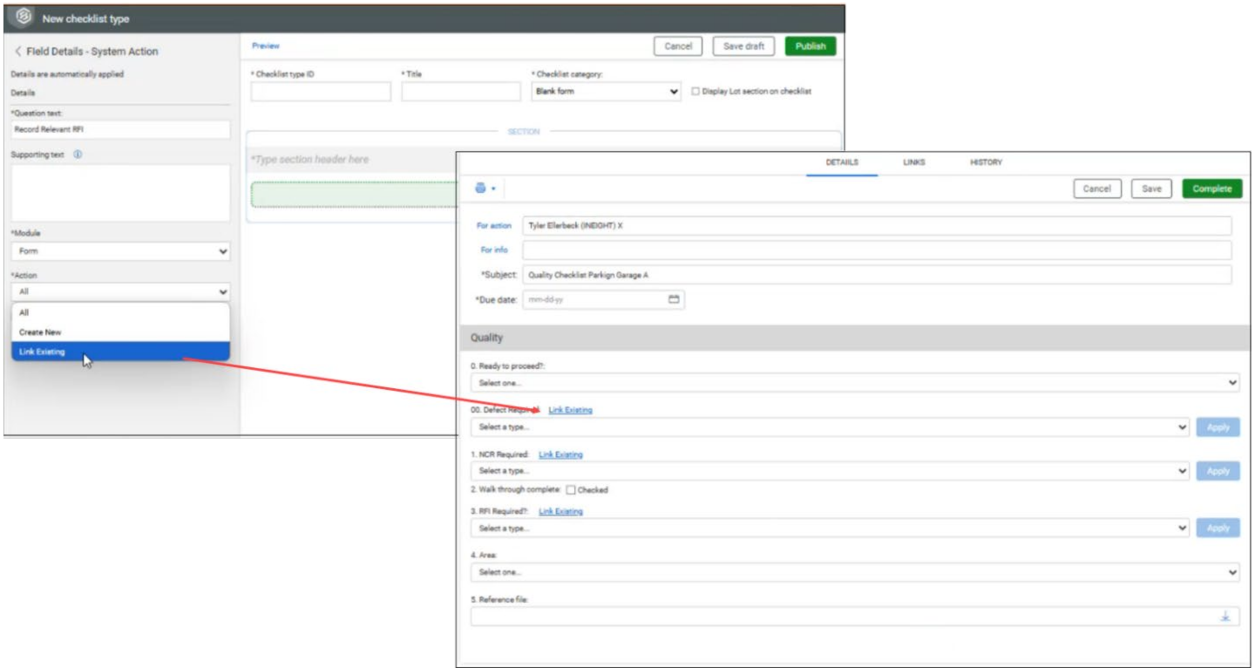
The control type Reference file, which lets you add attachments, has been added to the Checklist builder. When you add the Reference file question type to a checklist, the details section includes an option to attach a file to the checklist.



When completing the checklist, the user can click the link to attach the file to the checklist.

Link to an existing item in a checklist

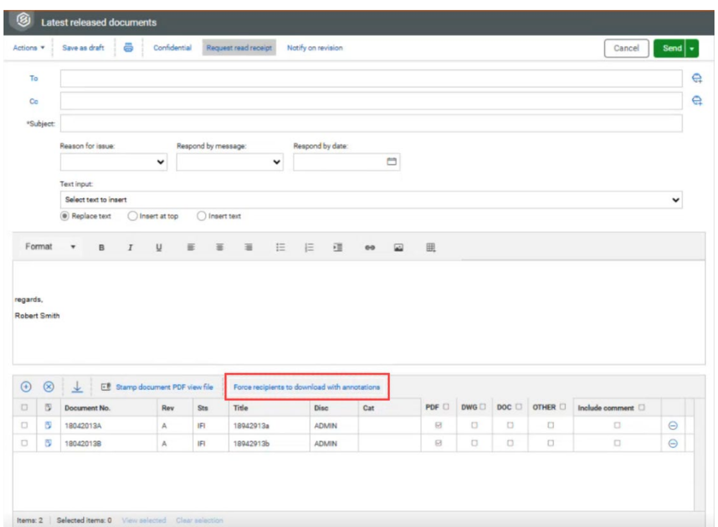
The Action drop-down list has been added to the system action, where you can indicate whether to create a new link or use an existing link. When you select the value *Link Existing*, a link, also called Link Existing, shows in the checklist. The checklist user clicks the checklist link to view the list of existing items for selection.



Transmittals

Control annotations on a download

The Force recipients to download with annotations button has been added to the documents section of the transmittal details.



To force the recipient to download the annotations, select the documents, and then click **Force recipients to download with annotations**. When the recipient downloads the transmittal from the Transmittals register, the Select files to download dialog box no longer shows the Download pdf files with Annotations check box, and the annotations are downloaded automatically.