ADMINISTRATION USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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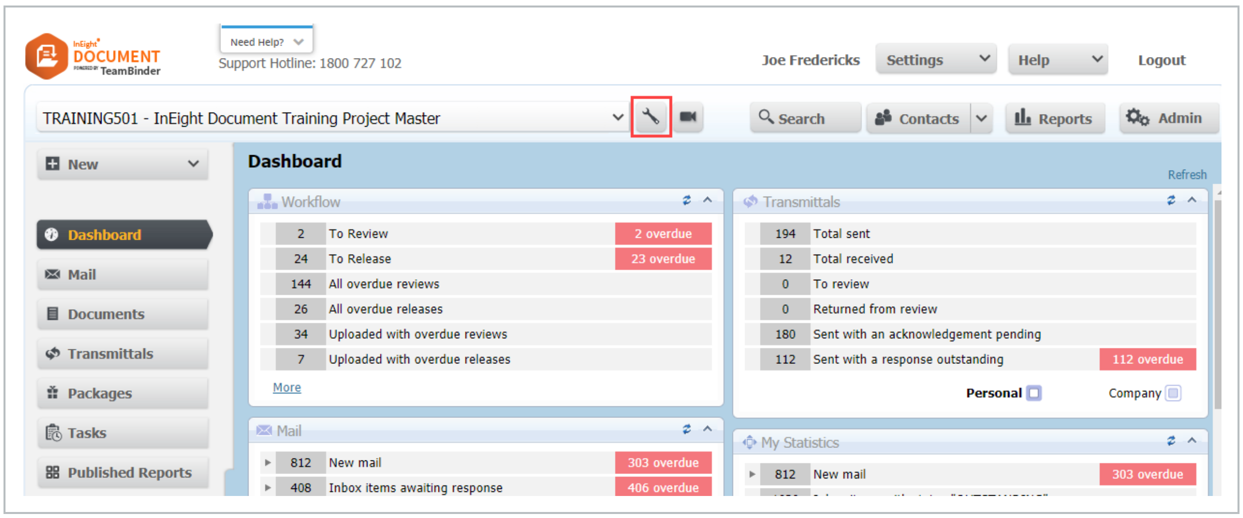
CHAPTER 1 – TASKS

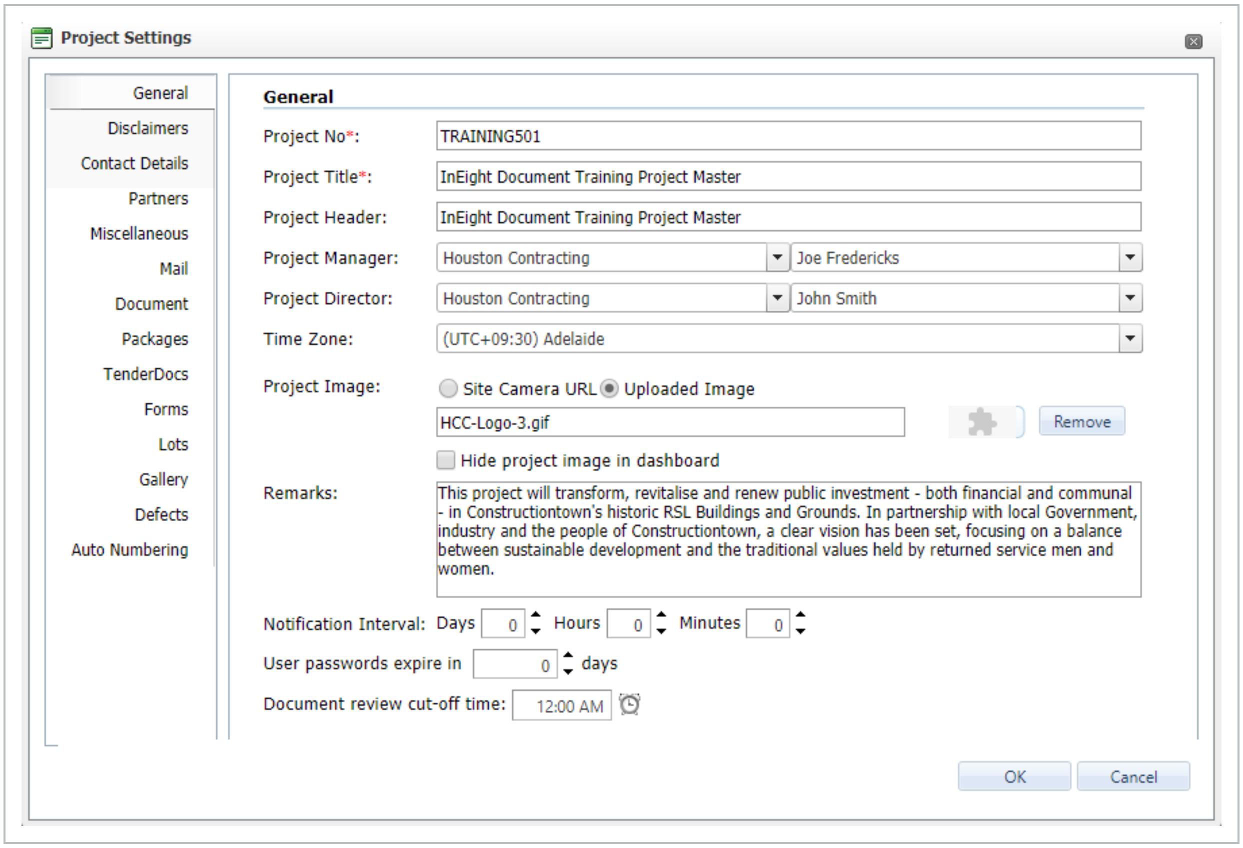
1.1 NAVIGATING PROJECT SETTINGS

Once a project has been created, the Project Settings can be edited at any time.

1. Click **Project Settings**.



2. Modify any of the settings which are grouped by tabs.



3. Click **Save** when done.

The available Project Settings are as described below:

Field	Description
General	
Project No	The Project Number can be any combination of letters and/or numbers with a maximum of 12 characters.
Project Title	Project Title.
Project Header	The text that appears in the Title bar when using this project.
Project Manager	The Project Manager of the hosting company.
Project Director	The Project Director of the hosting company.
Time Zone	Select the required time zone for the project, this is used to date and time stamp all transactions.

Field	Description
Weather Station	Select the Country and City the project is in.
Project Image	Options for displaying an image on the Dashboard are limited to uploading a static image. If applicable, tick the option to hide the image on the Dashboard.
Remarks	Enter the text to appear under Project Summary on the Dashboard.
Notification Interval	Select the Days, Hours, Minutes for the frequency with which the system will send email notifications relating to each event type in InEight Document. For example, if you were to receive 10 InEight Document mail items over one hour you would receive **one email** notifying you of all 10 InEight Document mails.
User Passwords expire within X days	The number of days after which users will be required to change their password.
Document review cut-off time:	Review days default is 12am to 11:59pm use this option to set a different cut-off time in 12 or 24 hour format.
Disclaimers	
Download Disclaimer	Enter a privacy message that will appear when users download documents from InEight Document.
Logon Disclaimer	Enter a disclaimer notice that will be shown to users at the point of first login to the project. This disclaimer must be agreed to by the user before they can proceed further. The disclaimer is shown across all devices and shown again to users if it is changed.
Contact Details	
Contact Details	Contact Address Details for the InEight Document Project hosting company.
Partners	
Partner Details	Select the primary companies on the project for the roles of Client, Architect, Prime Contractor, Engineering Consultant, and Quantity Surveyor (these values are for information only).
Miscellaneous	
Integration with other	Used to indicate whether the project has been integrated with other

Field	Description
Systems	externals systems such as Defect Inspector.
Filter	It is possible to define the default advanced search (filter) setting for all users for the mail module to show only mail that is dated within the last X days or since <date> when accessing the mail registers.
Allow company and user custom register views	This option enables users / company administrators to create their own / company based custom views of the main InEight Document registers.
Enable attachments in Mail / Transmittals / Packages	Enables attachments to be added to Mail, Transmittals and Packages (for example a scanned copy of a signed transmittal hardcopy).
Maximum size of attachments for mail / transmittal / package is X Mb	Once the attachments total in mail, transmittals or packages exceeds the size specified, they are sent as links to External Contacts.
Attach Comment Spreadsheet to Transmittals	**If enabled by InEight**, this option enables comments against documents to be auto converted to an excel file and attached to a transmittal. This is part of the process of managing the review of documents by External Reviewers
Publish Report caption	Enter a caption for Published Reports.
Publish Report abbreviation:	Enter an abbreviation for Published Reports.
Display Folder item as	Choose what to display when using the folder view within the InEight Document registers.
Useful Contacts Widget	Select the name of the person to appear as the project Administrator in the Useful Contacts widget on the Dashboard. Enter any text in the Useful information box. This will also appear in the Useful Contacts widget on the Dashboard.
Mail	
Enable use of Blind Copies (BCC) when sending mail	Used to enable the use of Blind Carbon Copies (BCC) by all users if required when generating mail.
Enable the changing of the status of mail of any user	This option enables a user with company access to mail to change the status of the mail of **any** user within the same company.

Field	Description
within a company by a user of the same company with Company mail access	
Allow private Live Mail issues	Tick this option to allow the creation of Private Live Mails.
Allow editing of unregistered mails prior to processing	Tick this option to enable unregistered mails to be edited prior to processing.
Allow removing of allocated mails from Folders/Sections	This option can be used to allow removing of allocated mail from Folders/Sections.
Open mail default view after sending mail	Select this option to display the sent mail details rather than return to the mail register after sending mail.
Allow cancellation of mails	Use this option to control cancelling of mail. Options are to enable cancellation by Administrators, Company Users and or Senders.
Contract Turn Around period	This is the contract turn around period defined in number of days (deprecated functionality)
Document	
Minimum Document Length.	The minimum Document Length field is for use when validating document uploads.
Send Document Comments to	Default settings for use when sending comments at the end of the review. The options are Originator, Review Coordinator, Recipients.
Notify reviewers about other reviewers comments on review completion	This option if ticked means that reviewers who have already completed their review of a document will be notified if subsequent reviewers make comments. This will allow previous reviewers to view and respond to these additional comments via the Document Register.
Allow closing of document comments by other users	This option allows any user able to view comments relating to a document to close out the comments of any other user in relation to the same document.
Allow comment ‘raised by’ to update comment attributes and closeout	This option allows the user specified in the ‘Raised by’ comment to update comment attributes and close out the comment even if they were not the user who entered the comment.

Field	Description
comment	
Allow responses to closed-out comments	This option if ticked enables responses to be added to comments that have been already closed-out.
Enable redlining and comments after document review workflow completion	Used to enable the ongoing red-lining of and commenting against documents by users with access to them once the review workflow for them is completed.
Enable redlining and comments on unrestrained documents	Used to enable or disable the ability for users to make comments or mark-up Un-Restrained documents.
Enable upload of additional View files by Review Coordinator within the release screen	This option enables the review coordinator to upload additional view files to a document as part of the **Document Release** process.
Enable redlining on restrained documents	Used to **disable** the ability to redline markup during a review. By default, the option is not selected
Enable upload of additional View files by Originator for Restrained documents	This option enables the document originator to upload additional view files to a document that is currently restrained and awaiting workflow activation.
Enable transmitting rejected documents to all users	This option enables the transmittal of Rejected documents to **any** user. By default, the option is not selected, and such transmittals are restricted to be sent only to the Document Originator.
Enable transmitting of review documents to all users	This option allows documents that are currently restrained to be transmitted to **any** user. If not selected, transmitting of restrained documents is limited to only users part of the workflow process.
Send automatic notifications to setup distribution group	If an un-restrained document is uploaded to an attributes that is not related to any Distribution Rule an automatic email notification will be sent to the Project Administrator.
Enable “Notify” option when adding new users to a distribution group	If enabled, when a person is added to a distribution group, the **Notify** box will be ticked by default.

Field	Description
Include Reviewer comments when releasing documents	During the release of document this option will select all comments and redlines by default in the Document Release screen.
Allow deleting of transmitted documents	This option enables documents to be deleted even if they have been included on transmittals. We recommend enabling this option only when required.
Allow changing details of multiple documents	This option enables the Primary and Additional Project Administrators to be able to change the details of documents in bulk.
Notify users about document deletion by default	When documents are deleted a notification can be sent to users, this setting sets the default.
Allow reviewers to bypass review	Allows reviewers in a workflow to bypass remaining reviewers and go straight to the Review Coordinator as long as this option is enabled and ‘Can send to Review Coordinator bypassing other reviews’ is enabled in the Review Team defaults.
Carry forward links when documents are revised	The Uploader is given the option to maintain the existing links to view files when the document is revised.
Allow Reviewers to nominate a review status	A reviewer can suggest a review status when completing the review process.
Allow review co-ordinator to edit PDF files with Bluebeam review in Release wizard	If Bluebeam integration is activated, this option will allow the Review Coordinator to edit any pdf files using Bluebeam within the Release wizard. Additional settings for this may need to be enabled by InEight.
Show Completed column in Release wizard to allow Review coordinators to control document releases	This option shows a ‘Completed’ column with a tick box in the document release screen.
Allow all users with document access to view its review status	This option allows all users with document access to see the Current Document Review Status.
Allow Review Initiator/ Administrator to Release/Reject documents	The Review Initiator can Release or Reject a restrained document without activating a workflow.

Field	Description
prior to workflow activation	
Allow uploading of superseded document revisions	For Administrators and/or Other Document Uploaders to upload superseded revisions of documents this option needs to be enabled. Select if access to documents uploaded as superseded is to be carried forward from the previous revision.
After uploading a restrained document Prompt to Start Review Prompt to transmit restrained documents	Once a restrained document has been uploaded choose ‘Prompt to start a review’ or ‘Prompt to transmit the restrained documents’. By default, ‘Prompt to transmit restrained documents’ will be selected.
Extract Document metadata from file name	This can be used with a single or bulk upload, if this option is ticked metadata is automatically updated based on information pulled from a Document name
Document Download expires in X days (notifications)	The value entered in this field will determine how long after the notification is sent the users can download the document from that email notification.
Respond to Transmittals within X days	This is a default number of working days used to calculate the respond by date for transmittals based on the current date + number of days defined here.
Packages	
Access to newly created packages	Choose whether newly created packages are to be accessible to all company users or only selected company users. It is also possible to prevent users modifying the security of a package at package level.
TenderDocs	
Show Tender Submissions only after the Tender is closed for bidding	Disables the Submissions tab within the Package Details screen until the Package Tender has been closed for bidding.
Allow upload to completed submissions	Enables Tenderers to upload additional documents to their submission even after they have marked their submission as complete.

Field	Description
Modules to be enabled in TenderDocs	Select which modules should be enabled in the TenderDocs portal.
Submission Originator	Use this option to define whether the Submission originator is either the Project Administrator or the Package Creator.
Auto Numbering	
Auto Numbering	This section is used to configure automatic number for any of: Document Numbers; Mail; Packages; or Transmittals.

NOTE

- The Project Number cannot be changed after project creation.
- There are two further Project Settings in relation to Documents that can be set only by InEight, please contact if these are of interest. These are:
- **Allow multiple files of same file extension for a single document** - enable more than one file with the same file extension to be uploaded against a single document (e.g. 2.pdf files).
- **Carry forward document comments** –outstanding comments against a document (not closed out) are automatically carried forward to the next revision of the document.

1.2 AUTO NUMBERING

The reference numbers of all mail, packages or transmittals created via InEight Document are automatically generated by the system.

By default, the numbering system for eg in Mail is: <Mail Type>-<From Company ID>-<Sequential No.> So an RFI sent by the company InEight (INEIGHT) would be auto numbering as RFI-INEIGHT-001

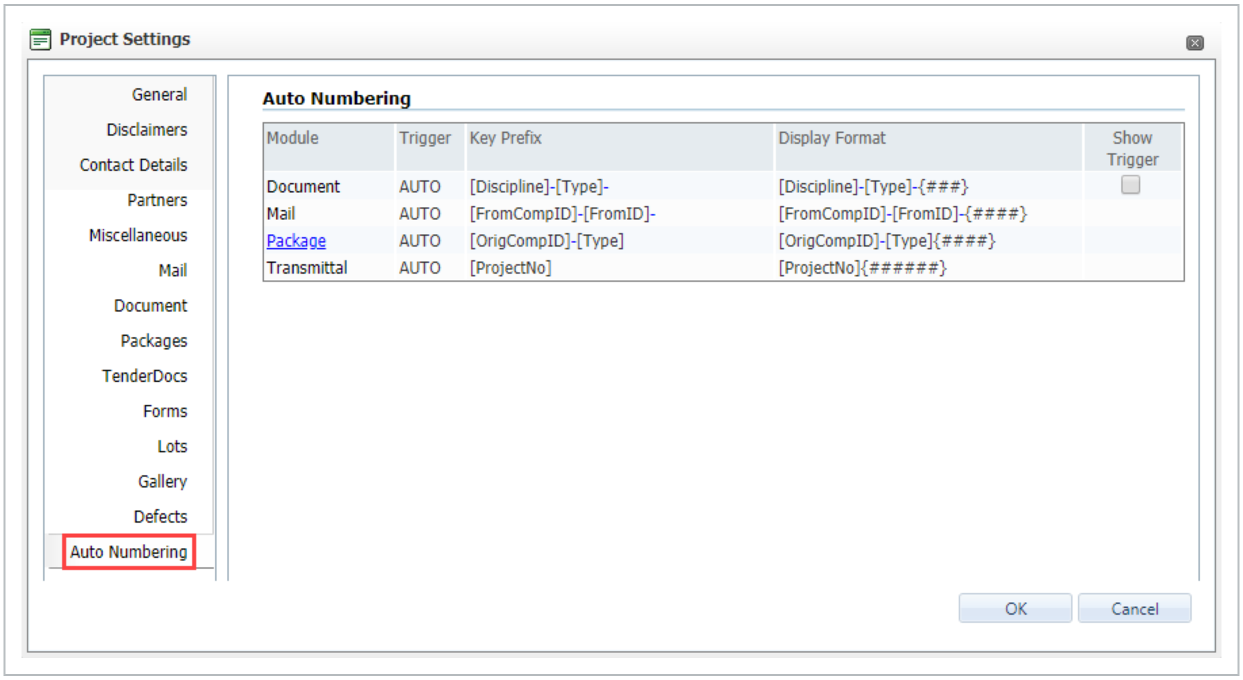
InEight Document also supports the configuration of customer specific mail numbering systems which if required, must be setup by the Project Administrator before any mails of each mail type are created.

Document Numbers are typically manually entered into InEight Document during the process of uploading documents to the system.

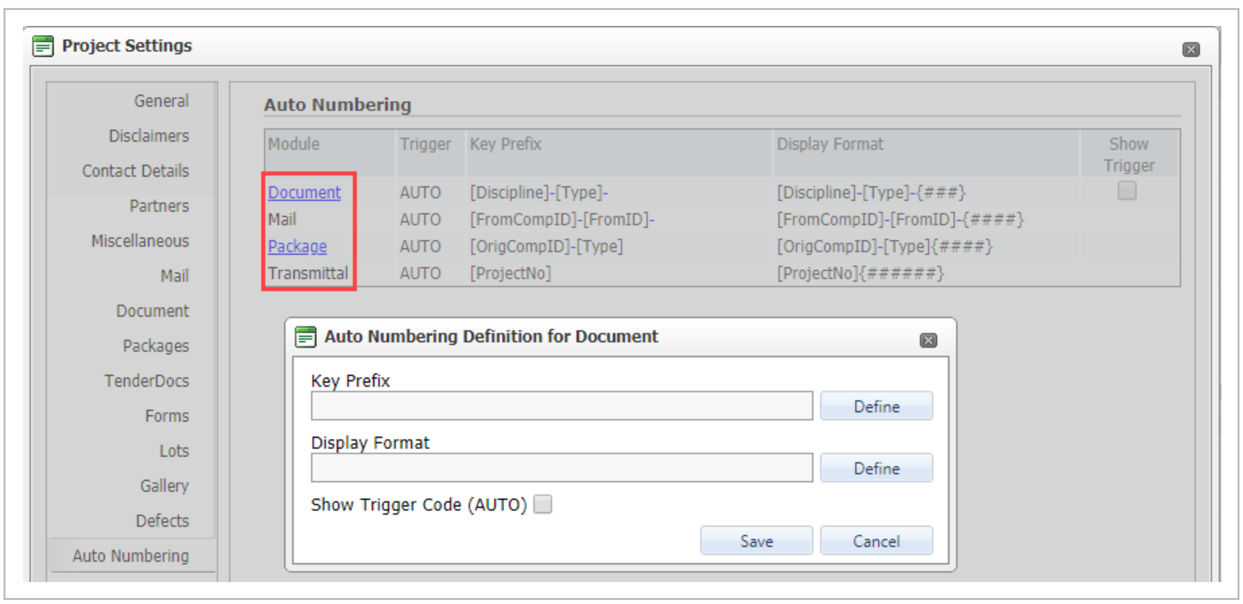
InEight Document supports auto numbering for documents based on selected meta data elements. When entering/uploading documents to the system, the use of automatic numbering rather than manual entry is trigged by the entry of the text “AUTO” in the document number field.

To configure auto numbering:

1. Go to at the top menu.
2. Click Auto Numbering.



3. Click on the relevant module.



4. The first step is to define the elements that will control the sequential numbering. At the Auto numbering definition window click the button to the right of the field.
5. At the Define Auto Numbering window select the first field that will control the numbering (for

example the field) from the field drop down list and click the button.

6. Enter a separator (for example “-“) in the box below the field drop down and click the button.
7. Repeat for additional fields and separators.
8. Select the number of digits to be included in the numeric suffix (for example “3”) from the numbering suffix sequence length field and click .
9. Define the display format (controls the format of the final number generated) which will have defaulted to the Key Prefix. Click the button to the right of the field.
10. Select the first field to form part of the final reference number (for example) from the field drop down list and click the button.
11. Enter a separator (for example “-“) in the box below the field drop down and click the button.
12. Repeat steps for additional fields and separators.
13. Select the number of digits to be included in the numeric suffix (for example “3”) from the numbering suffix sequence length field and click .
14. Tick to select . This allows the document number field to be automatically populated with the trigger when Automatic Mail Numbering is being used.
15. Back at the Auto numbering definition window click .
    - Once a data has been generated using a new custom numbering system the numbering system cannot be changed.
    - It is highly recommended you contact your InEight account representative for assistance when setting up your first custom numbering system.

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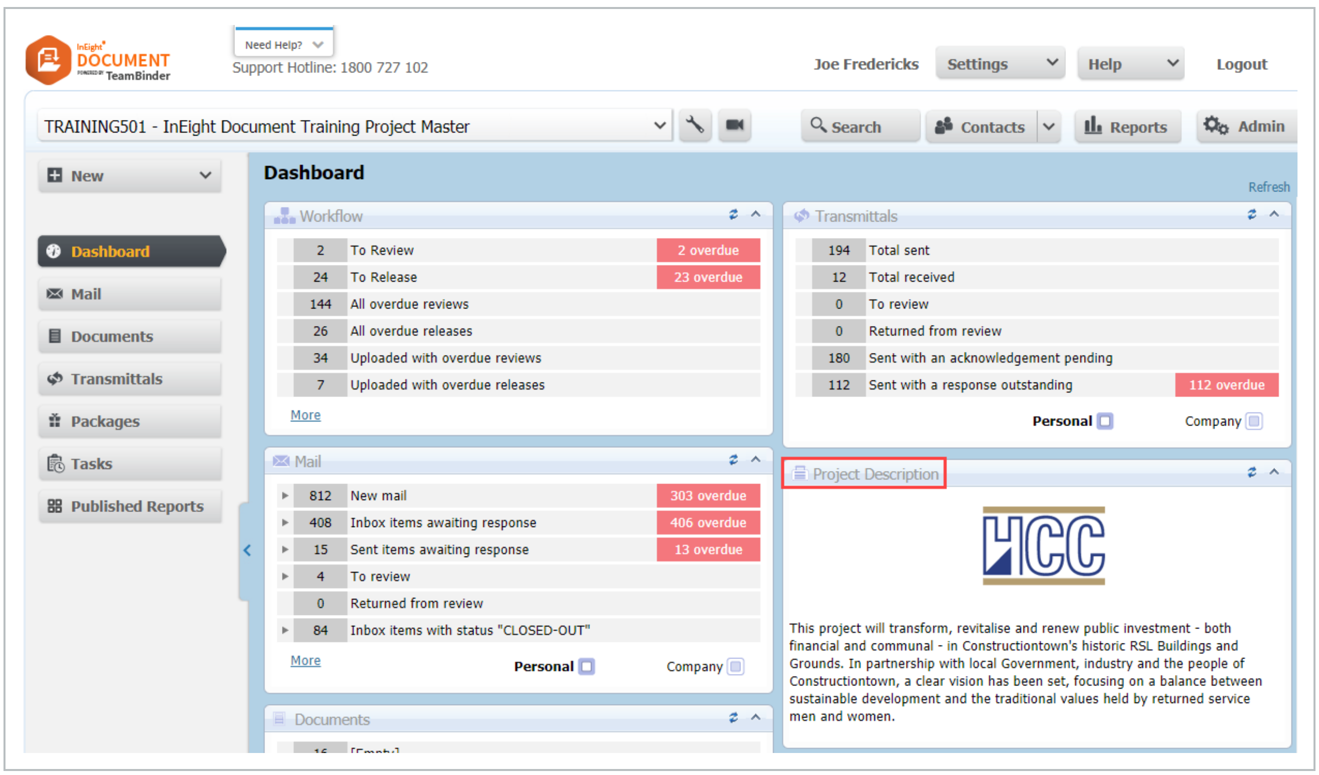
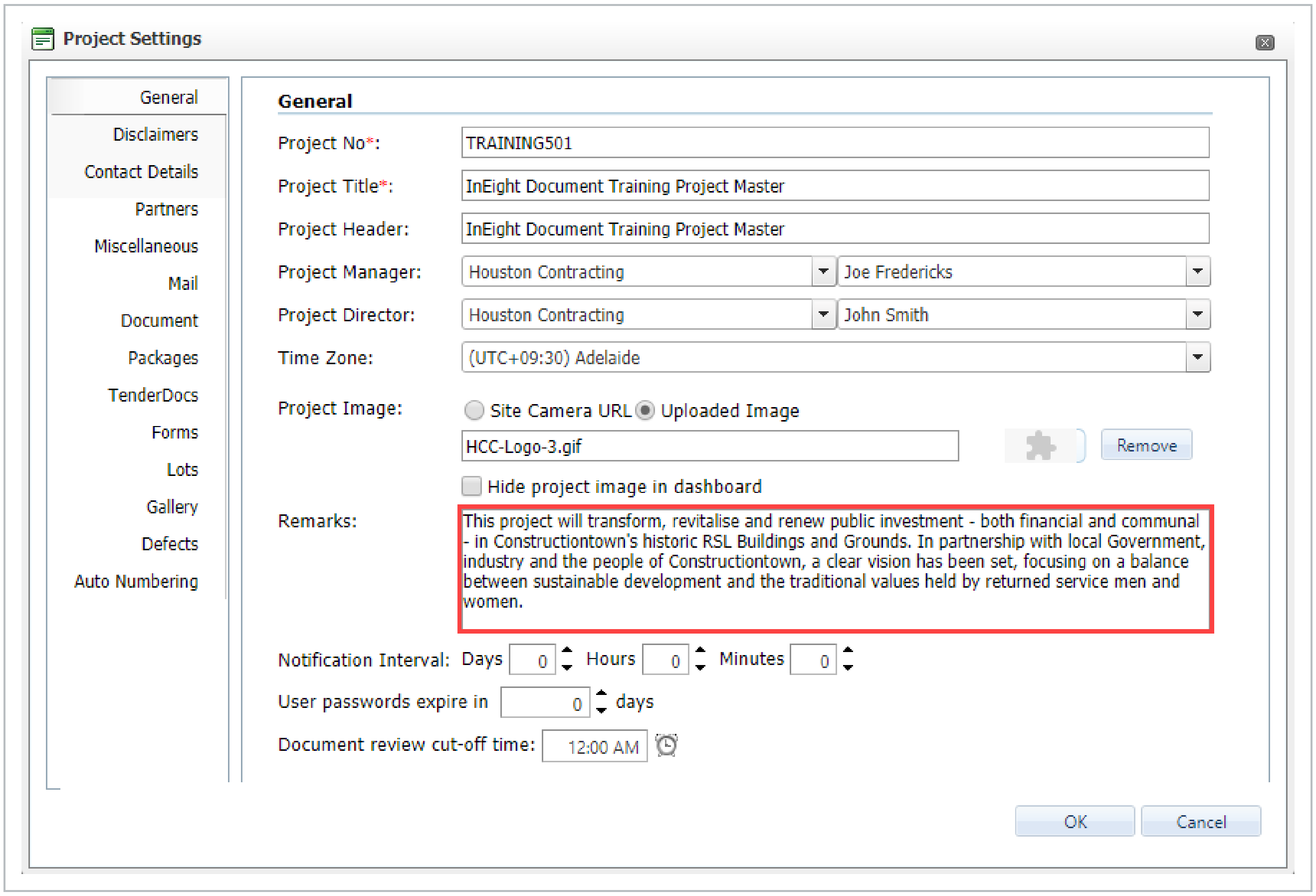
CHAPTER 2 – DASHBOARD ADMINISTRATION SETTINGS

2.1 PROJECT DESCRIPTION

The Project Description widget on the Dashboard is used to display a brief summary of the project and project logo.



The field for Project Description is maintained via the **General** tab under **Project Settings**.

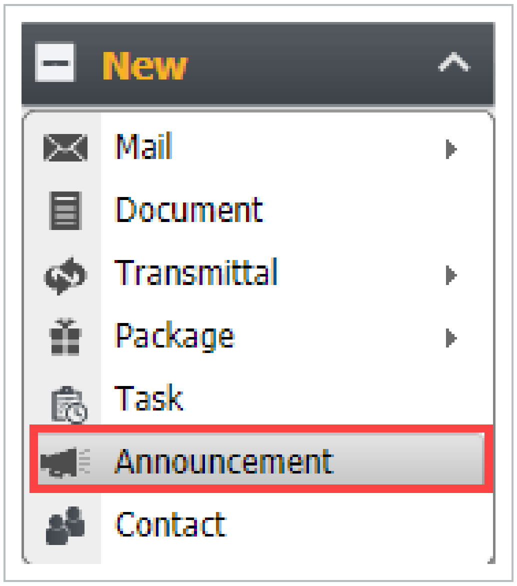


2.2 PROJECT ANNOUNCEMENTS

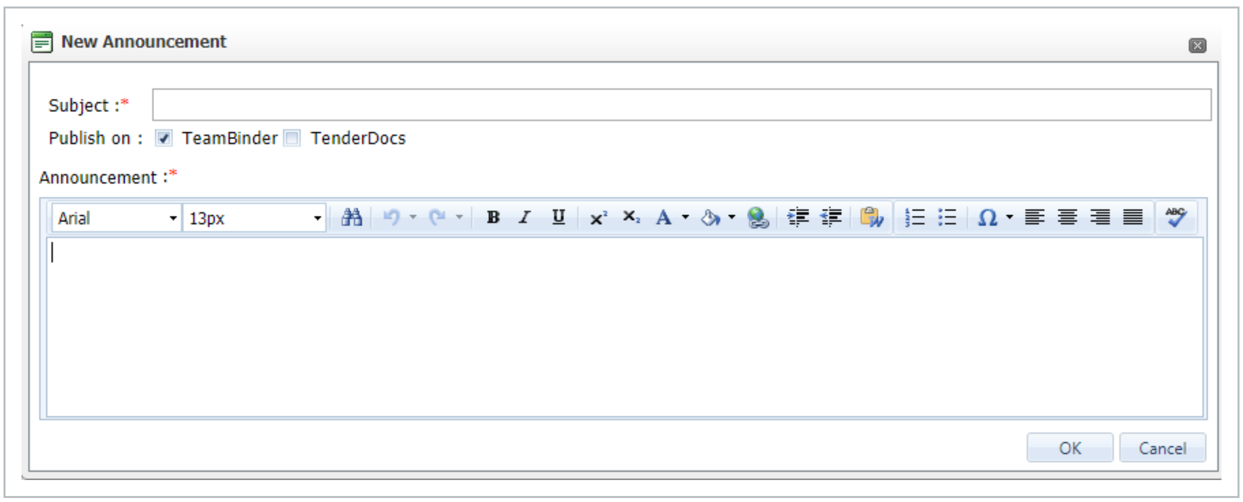
This widget displays any Project Announcements.

To publish an announcement:

1. Click **New** then **Announcement**.



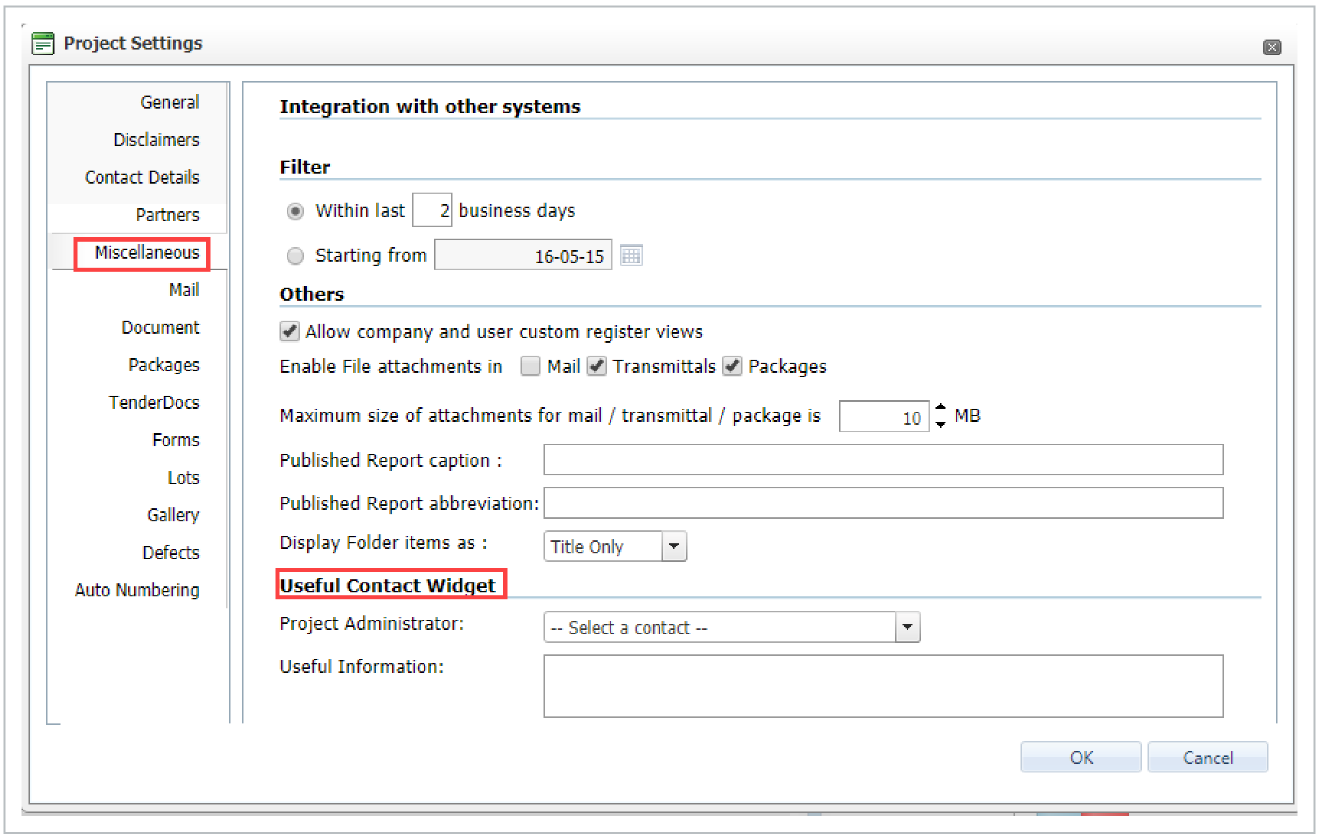
2. Enter both a Subject and the Announcement details and click **OK**.



2.3 USEFUL CONTACTS

The Project Administrator's contact details and Technical Help contacts will be displayed in the widget. The Technical Support contact number(s) and email can be configured to be project specific – contact InEight to get this arranged.

The fields for Project Administrator and Useful Information is maintained via the **Miscellaneous** tab under **Project Settings**.



CHAPTER 3 – CONTACT ADMINISTRATION

3.1 CONTACT ADMINISTRATION OVERVIEW

The Address book in InEight Document is project specific and structured in two levels:

1. Companies.
2. Contacts.

A sub level to Companies called Departments is optional. Companies can be categorized by both Company Type and Trade if required.

The Address book contains details of all users of InEight Document and any external contacts who will receive or send information but do not log into InEight Document.

The Address book can be populated manually, imported from another project, or imported from MS Excel.

Access to the Project Address book for the purpose of adding or editing contact details is restricted to the Primary and Additional Project Administrators (for all contacts), the Company Administrator (for contacts within their own company), and Users of the Project Administrator's company for the creation of External contacts. It is possible to enable Company Administrators to also create contacts in other companies.

For customers using multiple InEight Document projects, the concept of a Global Address book can be supported if required.

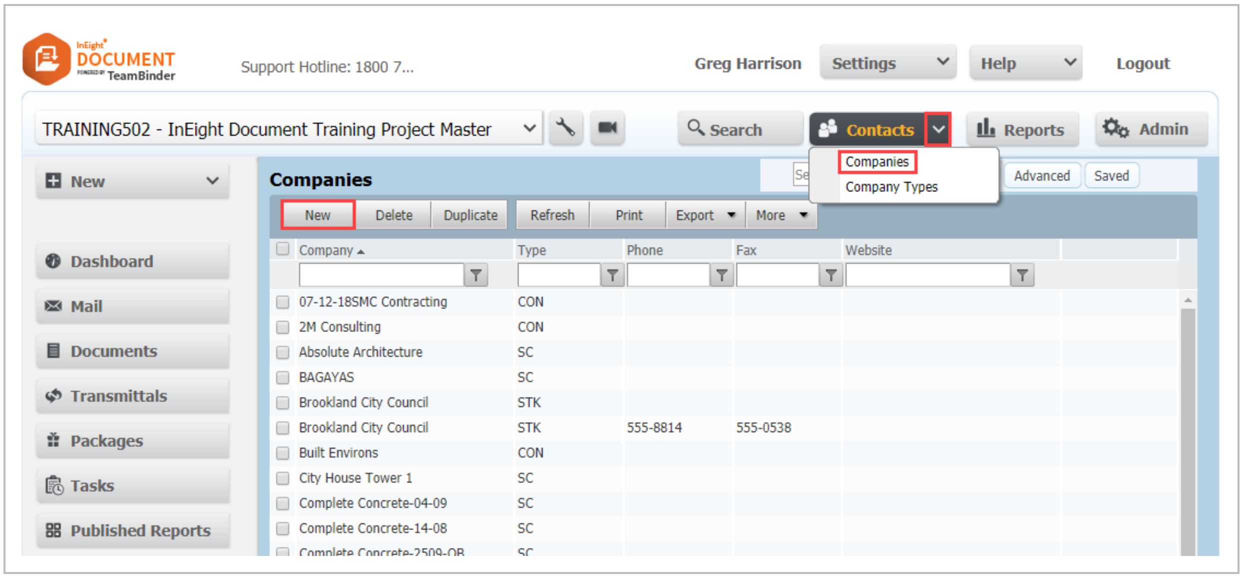
3.2 CREATING COMPANIES

Companies in InEight Document are used to group contacts belonging to the same organization or company.

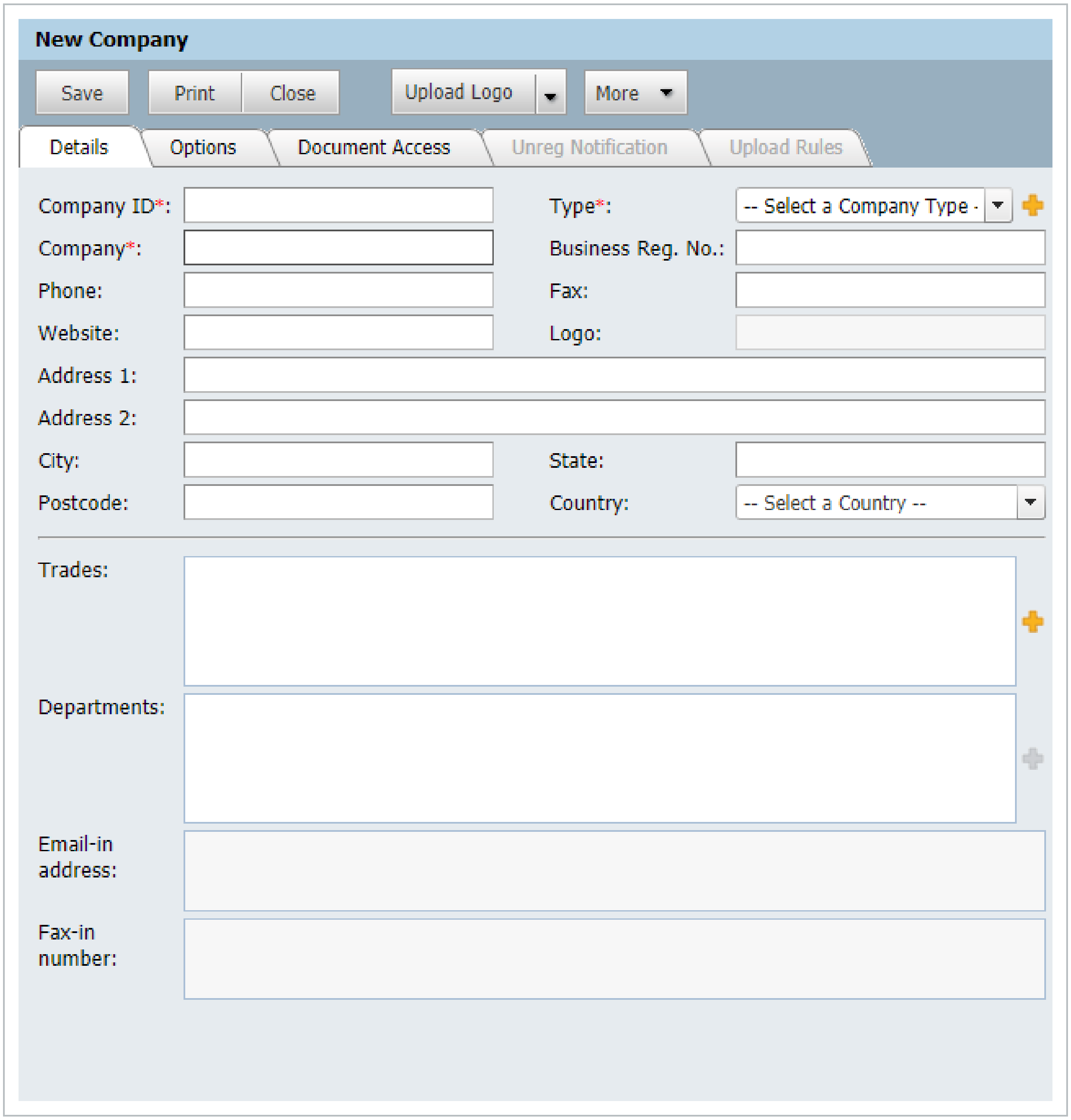
It is not possible to create a contact without first creating the company they belong to.

To create a new company:

1. Click the drop down next to **Contacts** select **Companies**.



2. At the **Companies** screen click **New**.
3. At the New Company Details window enter the following information using the Details, Options tabs and the menu options.



Field	Description
Company Details	
Company ID*	The Company ID you assign will be used throughout the InEight Document system and it is advisable to create a procedure on how you will assign Company IDs. A meaningful abbreviation for Company IDs is suggested for example INEIGHT for InEight.

Field	Description
Company Name*	The Company Name.
Company Type*	The type of company.
Company Details	
Business Reg. No.:	The business registration number for the company.
Address Details	Enter the Address Details for the Company which include: Address Line 1, Address Line 2, City, State, Postcode, and Country, Phone, Fax, and Website. The address details entered for the company are used as the default address for any contacts created within the company.
Logo	The logo file for use on Mail and Reports etc.
Trades	Use the + button to assign one or more Trades to the Company.
Departments	Use the + button to define Departments within the Company.
Fax-in Number	The project fax number for the company used for the Integrated service and on default mail form headers.
Email-in Address	The project email address for the company used for the Integrated Email-In service and on default mail form headers.
Options	
Company Administrator	Selected Company Administrator.
Force users to file Mail in Folders.	To control the filing of mail into Folders for users within this company. The options are Never, Prompt, or Always.
Allow removing allocated mails from Folders.	To control if users can remove mails from Folders once they have been filed.
Enable Personal Unregistered Mailboxes	Will activate Personal Unregistered Mailbox for this company.
Upload to other company documents	Enables the company to upload revisions of documents where they are not in the original uploading company.

Field	Description
Allow uploading documents on behalf of other companies.	This option enables this company to upload documents on behalf of other companies.
Send confirmation to sender when processing unregistered mails.	Un-Tick this box to stop the sending of notifications from InEight Document to the senders of unregistered mails (Fax-In and Email-In).
Only the Company Administrator can create/manage users within this company	This option prevents the Primary or Additional Project Administrators or other users belonging to this company from creating additional users within this company.
Allow company administrator to create contacts in other companies	This option enables company administrators to create contacts in companies other than their own. This option can only be enabled by InEight.
Allow user custom register views	Tick this option to enables users to create their own custom views of the main InEight Document registers.
Document Access	
In Document Register:	**Show document list users have access to** - allows users in that company to only see documents listed that they have access to. **Show document list users have access to or uploaded by their company** - in addition will list all documents that were uploaded by their company **Show entire documents list** - the entire list visible. These options do not change a person’s access only the view in the Document Register
Provide users access to documents uploaded by their company	This option gives **access** to all users within a company to **all** documents uploaded by their company.
Provide users access to documents received	If activated by InEight (and ticked) allows users access to documents transmittal regardless if they were a recipient on the transmittal.

Field	Description
via transmittal	Select the users (All or Selected) that receive transmittals to be granted access to other users. Select the users (All or Selected) who will gain access to the documents received via the transmittals defined above. There is also an option of allowing new users within the company to gain access as they are setup.
Unreg Notifications	
Unreg Notifications	Select contacts within the company to receive notifications about the receipt of new Unregistered mail.
Upload Rules	
Upload Rules	Used to add an upload rules to the company , this controls what types of documents users can upload. The Upload Rules are defined via Manage Document Rules.
Menu buttons	
Print	User can print the company details.
Upload Logo	**Upload Logo** is used to upload your company logo for mail, reports, etc. Use the **Remove Logo** button to remove a previous uploaded logo and the **Customize Logo** button to customize the position of the logo on mail.

*Mandatory fields

4. **Save** and **Close** when finished.

NOTE

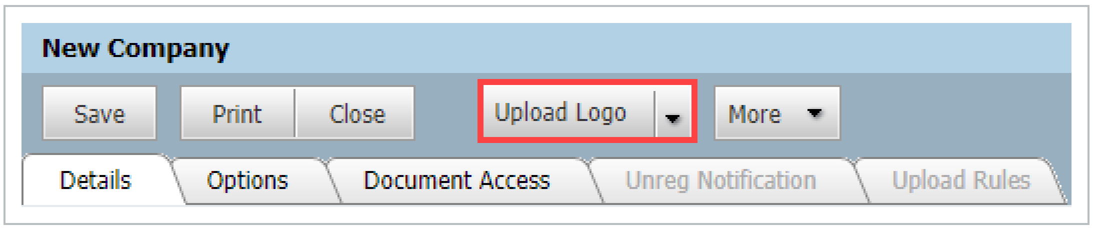
- To delete companies click **Delete** , only if no contacts are set up for the company.
- The Company ID can be changed by the Primary or Additional Project Administrators.
- Use **More** to: **Duplicate** a company; **Make all Contacts** in a company **Active/In-Active**; or **Customize** the layout of the register.
- Use **Export**, Excel and choose between All Items and Selected Items to export the current filter in the Company register.

3.2.1 Adding a Company Logo

InEight Document uses a series of default standard templates for all mail types within a project. Participating companies on a project using InEight Document can add their own company logo to these templates. This logo will then be used as a header on all outgoing mail and for InEight Document reports generated by the company.

To add a company logo:

1. Click the drop down next to **Contacts** and select **Companies**.
2. Filter for and open the company details screen.
3. Click **Upload Logo**.

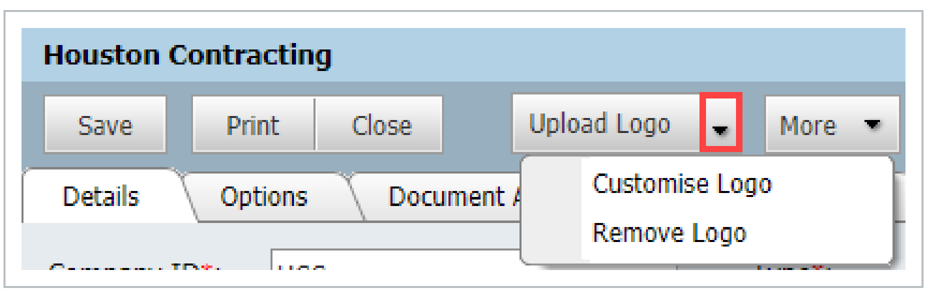


4. Locate the logo file and **Open**.
5. Click **Save** and your logo file will be uploaded to the server.

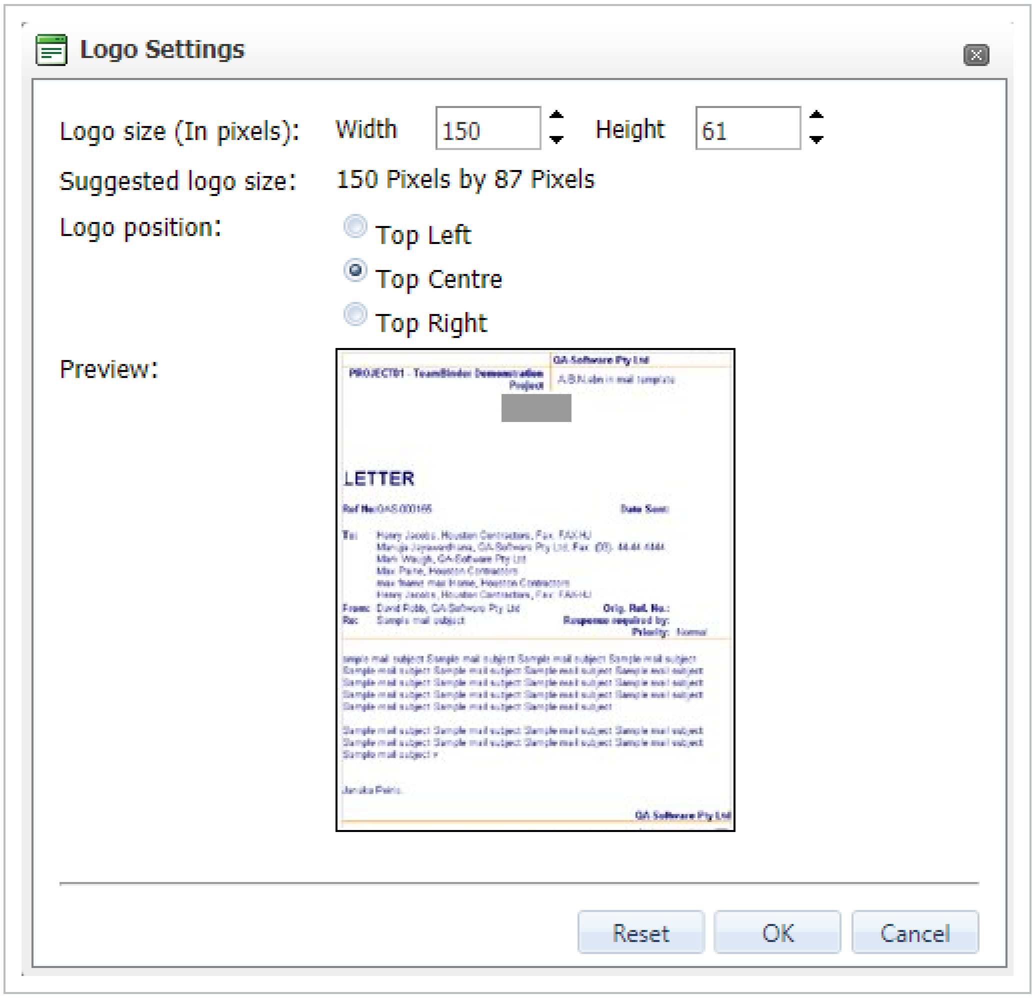
3.2.2 Updating Logo Settings

To adjust your logo:

1. Within the **Companies** detail select **Customize Logo** from the **Upload Logo** drop down list.



2. Edit the **pixel settings** which control the logo size (height and width).



3. Choose the required **position** for the logo from Top Right, Top Middle or Top Left.
4. Use the **preview area** button to see how your logo will appear on mail.

NOTE

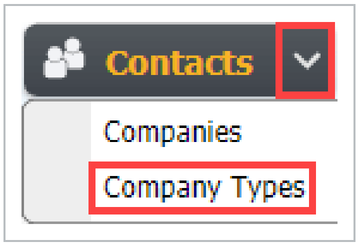
- The preview will show you the position of the logo on a default mail template, not your custom mail template.
- The logo file formats supported are GIF, JPEG / JPG / JPE, PNG, BMP.
- Use the **Remove Logo** selection from the Upload Logo drop down list to remove an uploaded logo. This is required if you want to replace your company logo with a new file.

3.3 CREATING COMPANY TYPES

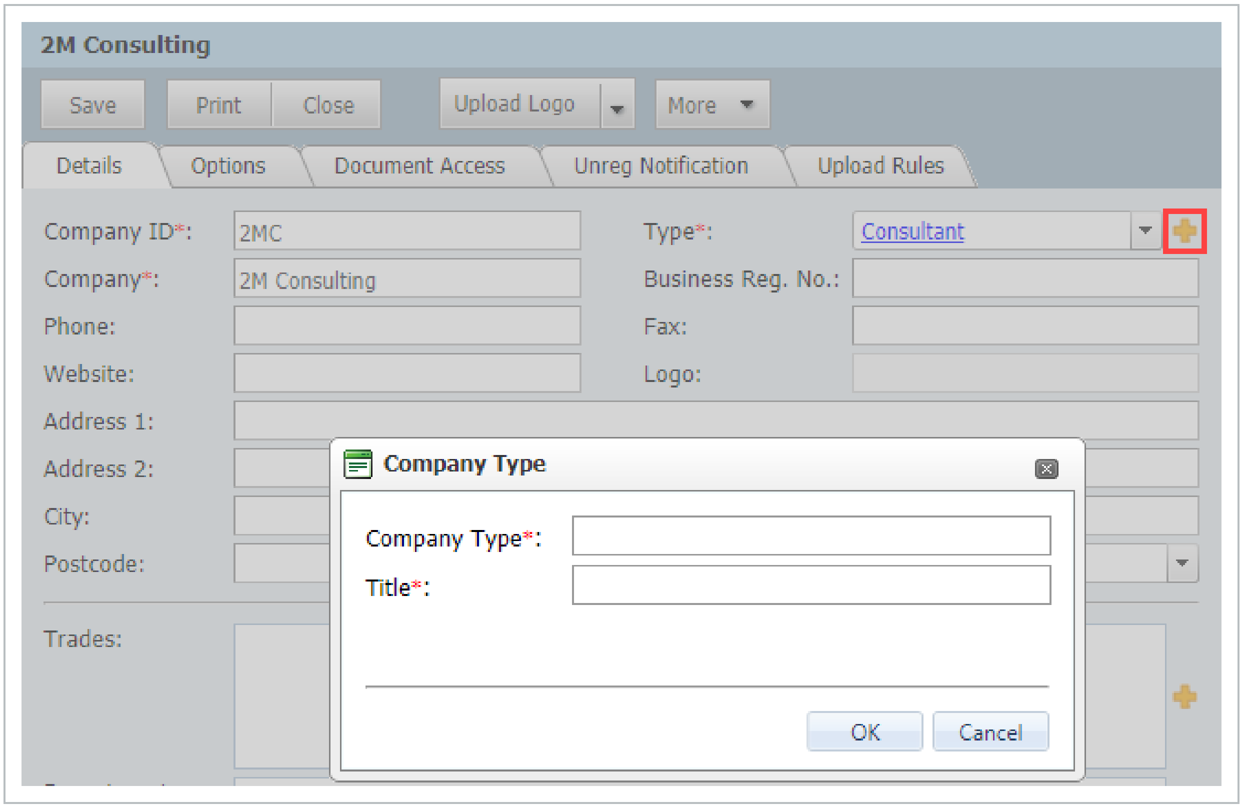
Company Types are used to group or select companies based on their business type.

To create a new company type:

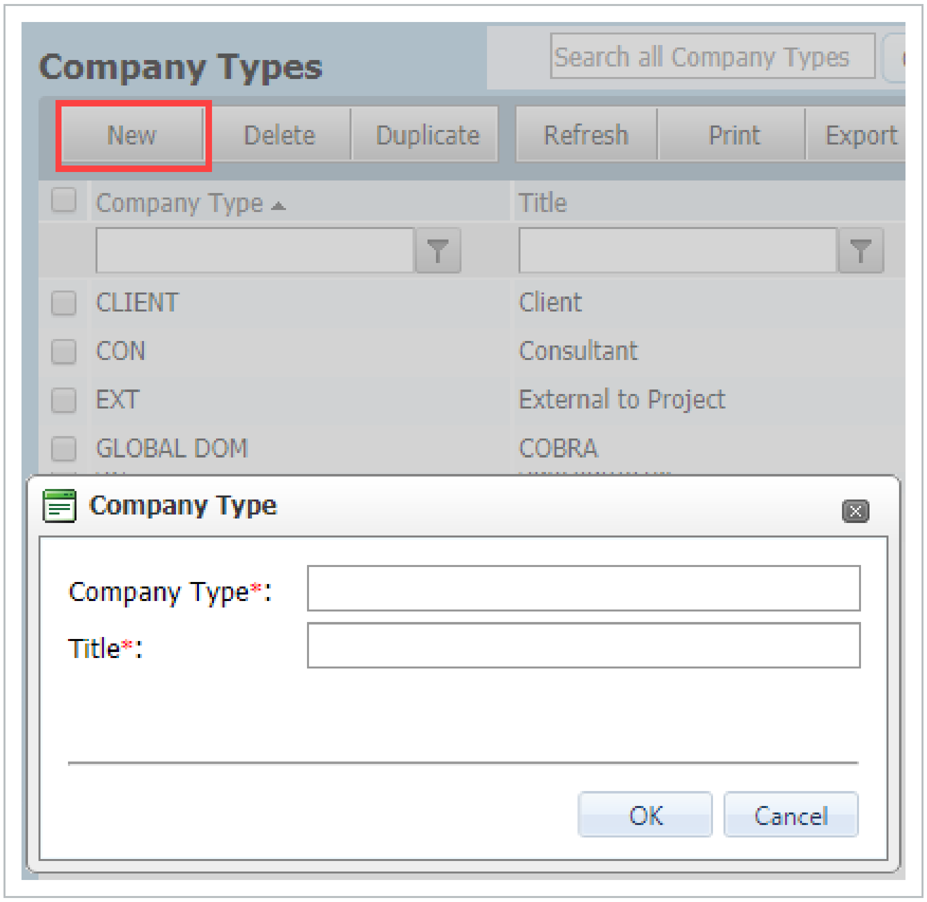
1. Click the drop down next to **Contacts** select **Company Types**.



2. Alternatively, filter for and open the company details screen, to the right of Type drop down list click the **+** button.



3. At the Company Types window click the **New** button and enter a Type code and title.



4. Click **OK**.

NOTE	Use **Export**, Excel and choose between All Items and Selected Items to export the current filter in the Company Types register.

3.4 CREATING DEPARTMENTS

Department is a sub-level of a Company and can be used to group contacts within a company for the purpose of controlling access to Mail, Unregistered mail and Transmittal.

To create Departments for a Company:

1. Click the drop down next to **Contacts** and select **Companies**.
2. Open the company details screen.
3. To the right of the Departments field click the + button.

4. At the Department window, enter a Department ID and Title and click **OK**.

NOTE

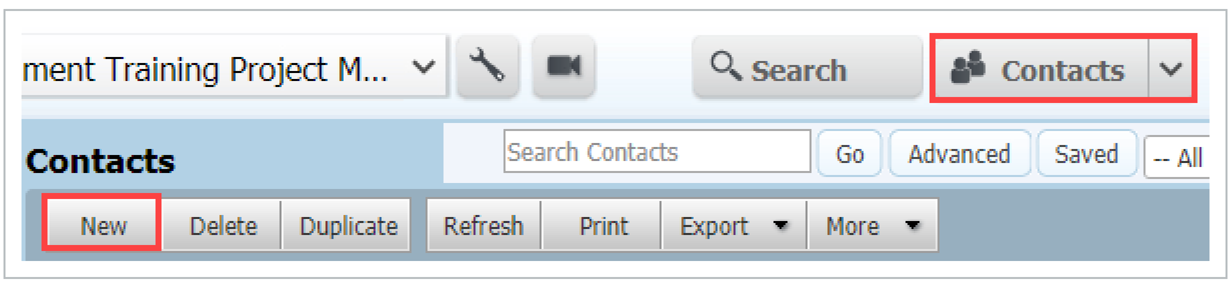
- The Notes field can be used to store a text string that can be used for example on custom mail forms to create Department based mail footers.
- To assign users to be notified when Unregistered Mails are received to the department Email-In address, use the **Unreg Notifications** tab in company details and select the Department from the drop down available at the top of the screen.

3.5 CREATING EXTERNAL CONTACTS AND USERS

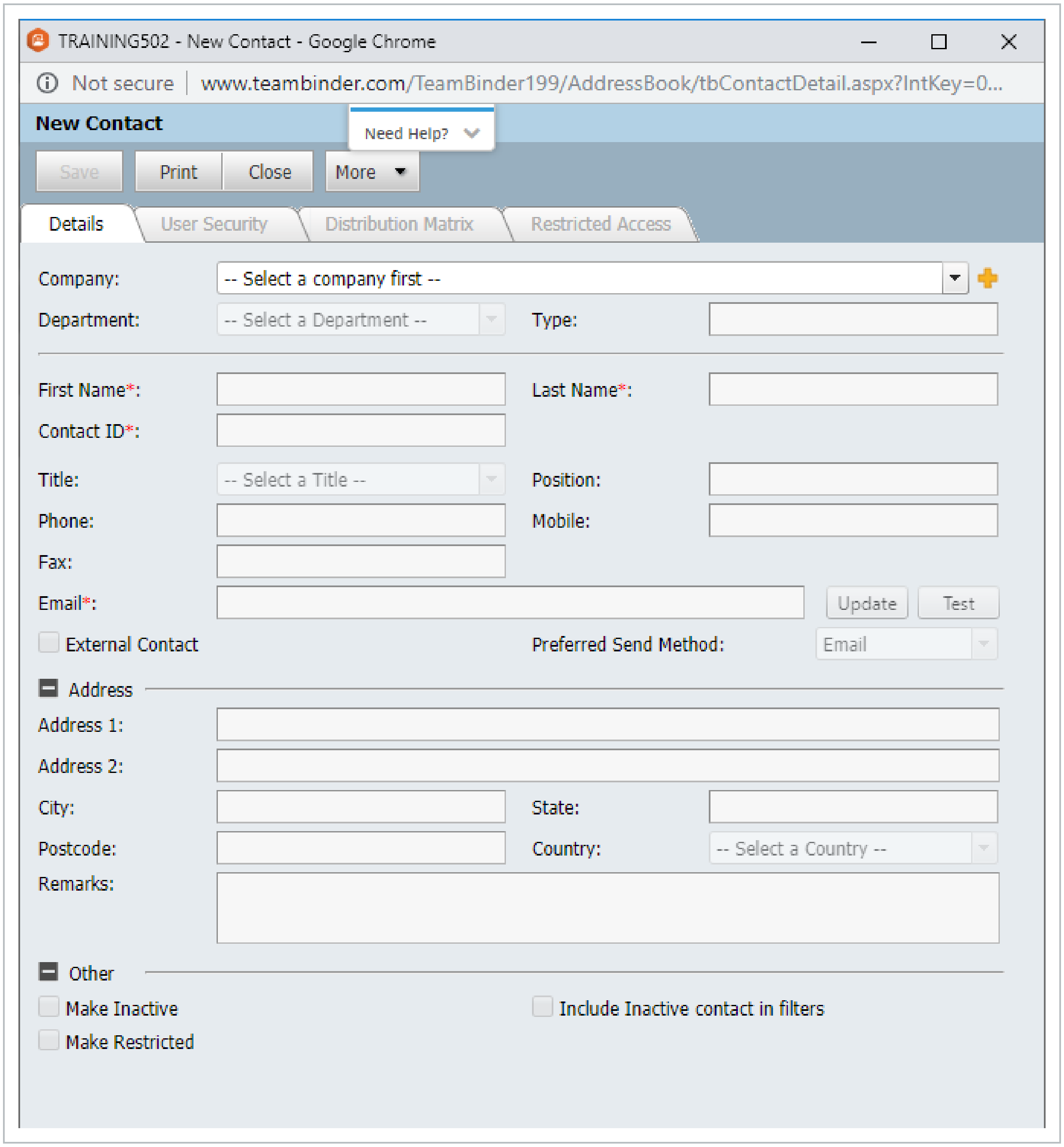
Contacts are used throughout the InEight Document System in all modules. All Contacts are maintained via the Address book regardless of whether they can log into InEight Document as users, or just receive content from InEight Document via email as an External Contact.

To create a contact:

1. Click **Contacts**, then locate the company the new contact belongs to.



2. Click **New**, then enter relevant fields explained in the table below:



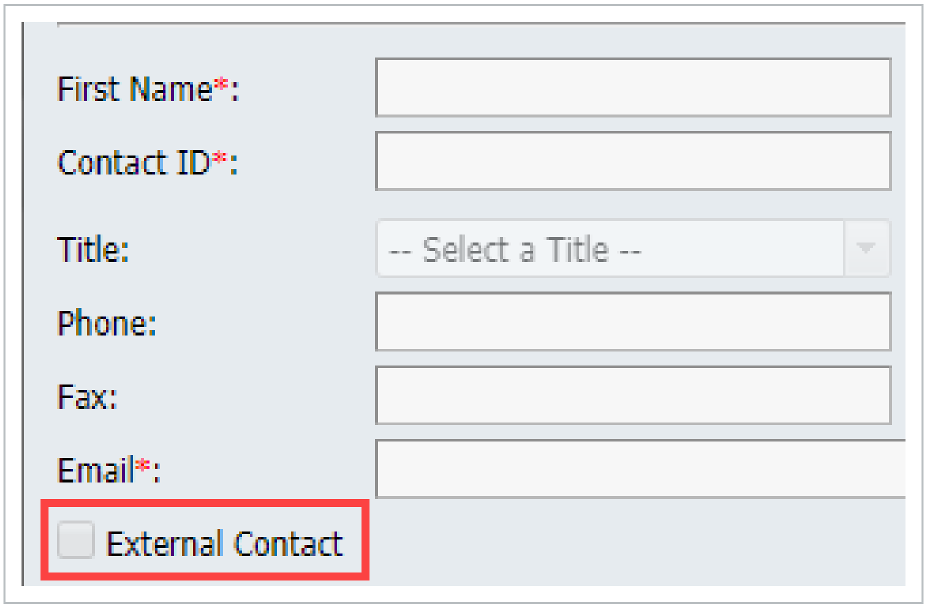
Field	Description
Company	The name of the company the contact belongs to.
Department	Select the Department the contact relates to (optional).

Field	Description
Type	Company Type.
Contact ID*	This ID must be unique within the company. The system automatically creates a default ID as Initial + first 9 characters of the Last Name. For example, JBLOE for Joe Bloe.
First Name*	First name of the contact.
Last Name*	Last name of the contact.
Title*	Title for the contact from the drop down list.
Position	The position the contact holds within the company they belong to.
Phone, Mobile, Fax	Enter contact numbers. The Fax number can be used both by the Integrated Fax-Out service and the Fax-In service.
Email	Enter the email address for the contact. This is used when sending mail and notifications by email and by the Integrated Email-In service.
Address Details	Enter the Address Details for the contact which include: Address Line 1, Address Line 2, City, State, Postcode, and Country.
Remarks	Free form text field for any remarks about the contact.
External Contact	Used to make the contact an External Contact.
Preferred Send Method	Choose between **Email**, **Fax**, and **HC** (Hardcopy) as the default send method for the contact. This is applicable for External Contacts only.
Make Inactive	This option makes a contact/user Inactive. The contact will no longer appear in the address book when creating mail, transmitting documents or anywhere the address book is used.
Make Restricted	This option restricts the users/contacts this contact can communicate with.
Include Inactive contact in filters	Used to include Inactive contacts in filters for reports or queries.

*Mandatory fields

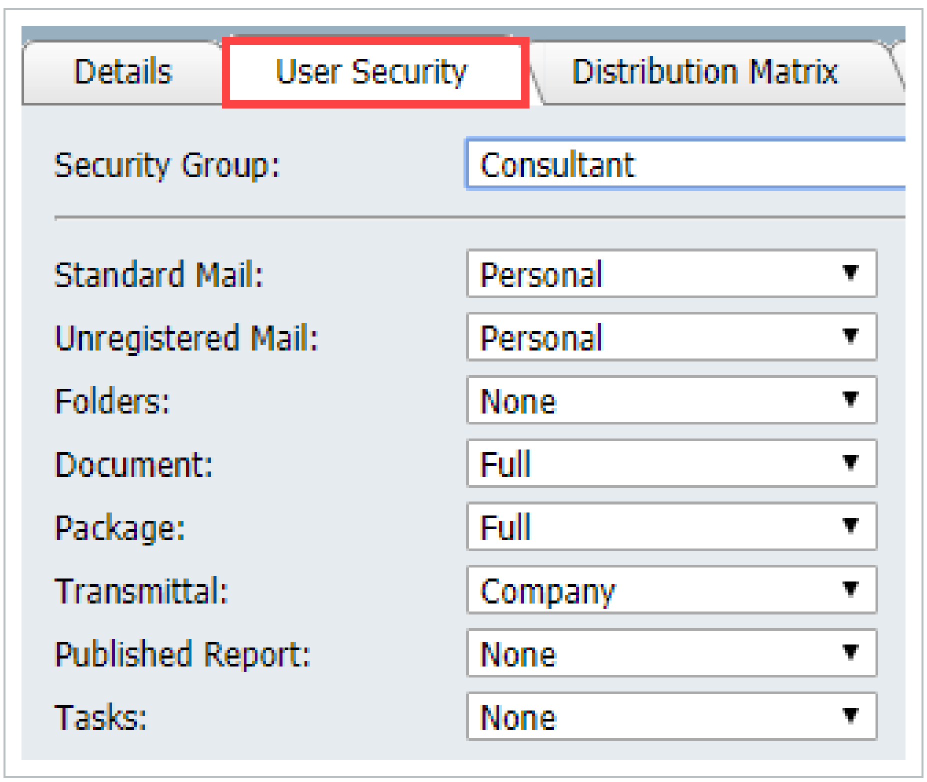
Fields generated by the system

3. If the User is an External Contact only, ensure the **External Contact** option is ticked.

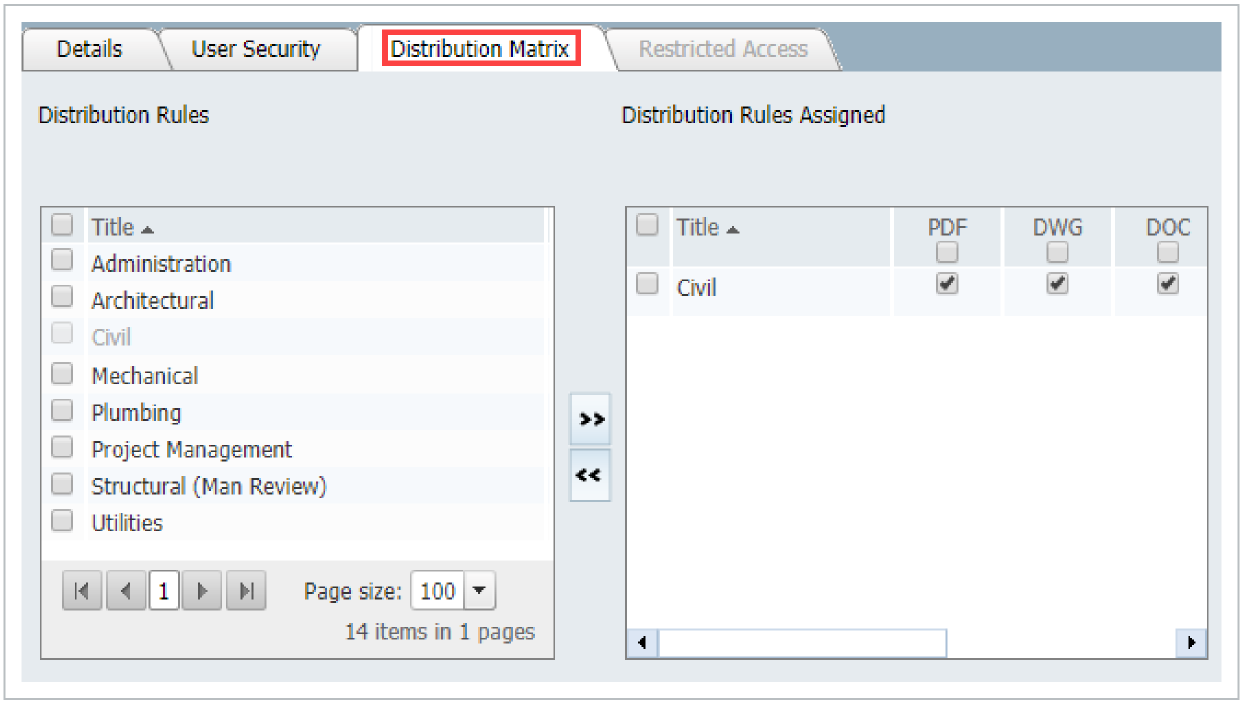


4. Click **Save.**

5. To convert the contact into an InEight Document user (with login access), click on the **User Security** tab and add them to a security group.



6. Update their access to each module (None, Personal, Department, Company etc) as required.
7. Optional: Select the Distribution Matrix tab to add them to a distribution rule.



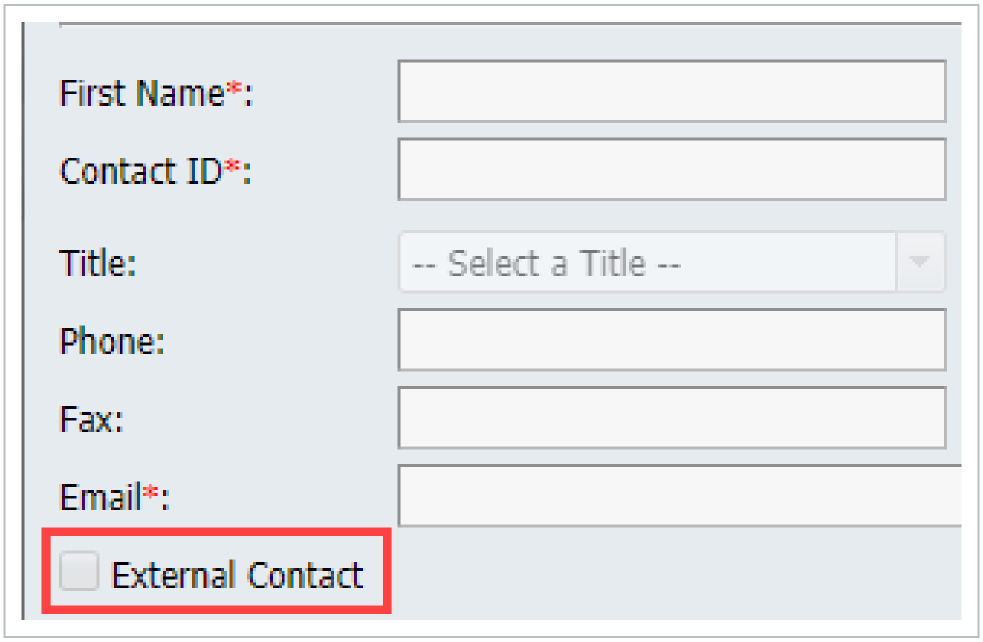
NOTE

- A security setting can be enabled to 'Allow the Administrators of the Project to modify other user's email addresses' otherwise contact support@ineight.com if an email address needs to be updated.
- Contact IDs can be changed, if the user is not logged in, by editing the Contact Details and **Save**.
- Inactive Contacts are displayed in grey at the Contacts screen. You can display only Active contacts via the Advanced Contact search and filtering for "Active User equal to Yes".
- When a contact is made inactive notifications are switched off, they are removed from listed document distribution rules and any assigned security group.
- If an in-active contact is made active again, you will be prompted to re-install previous access level.
- Use **Duplicate** to create a new contact with the same security settings as an existing contact. You will be prompted to duplicate the security settings.
- Use to delete a contact that has not made any transactions in any InEight Document Module and has been made inactive.
- Use **More** for selected Contacts in bulk to: Send Login info, Set User Preferences for active users, Make Inactive where the option to add to Filters will be prompted, Make Restricted, Make External, Remove and Add to Security Group, Customizing the Register View.
- Use **Export**, Excel and choose between All Items and Selected Items to export the current filter in the Contacts register.

3.6 EXTERNAL CONTACTS

External Contacts are contacts that need to be sent mail or documents, however, there is no requirement for them to log into InEight Document as a User.

External Contacts are setup under **Contacts** in the same way as users of InEight Document. They are then indicated as being **External Contacts** by ticking the **External** contact box from the user creation details window.



The following differences apply to External Contacts:

1. Mail sent to an external contact is received as an email rather than receiving an email notification about mail.
2. A copy of all mail sent to an external contact is maintained in the Inbox of the contact in case they change from an external contact to an InEight Document User.
3. If an external contact replies directly to a mail received from InEight Document, the mail is routed back into the InEight Document project Unregistered mail box for processing.

All other notifications generated by InEight Document such as Transmittals operate normally for external contacts.

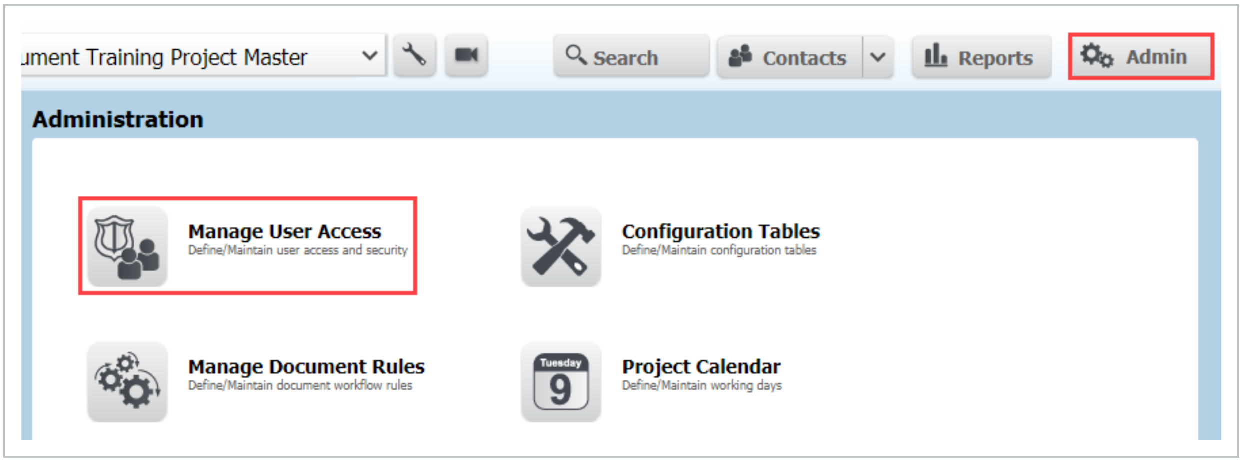
If an External contact is changed to an InEight Document user they will see all mail and transmittals sent to them as though they had been an InEight Document user from the beginning.

NOTE	Use the **Make External** option from the **More** button to make multiple selected contacts External in one go.

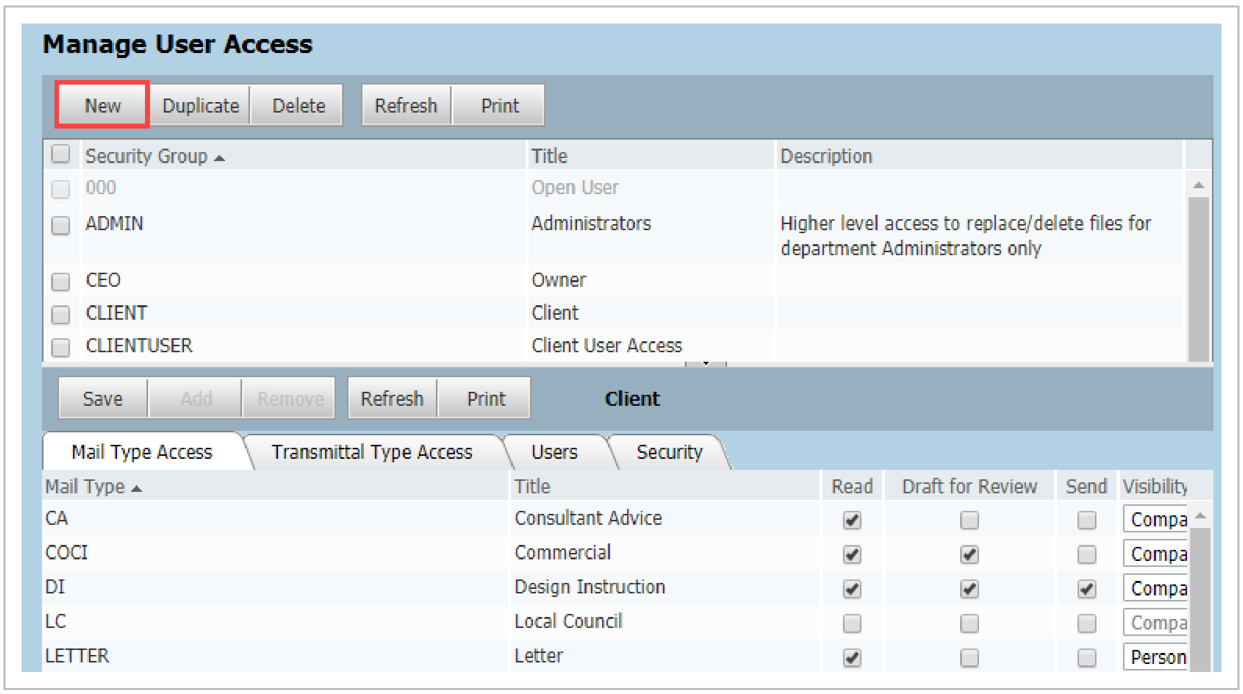
3.7 CREATING A SECURITY GROUP

The minimum setting to make a contact a user of InEight Document is adding to a Security Group. A Security Group controls access to Mail Types, Transmittal Types, Form Types, and/or Document Admin functions by users allocated to the group.

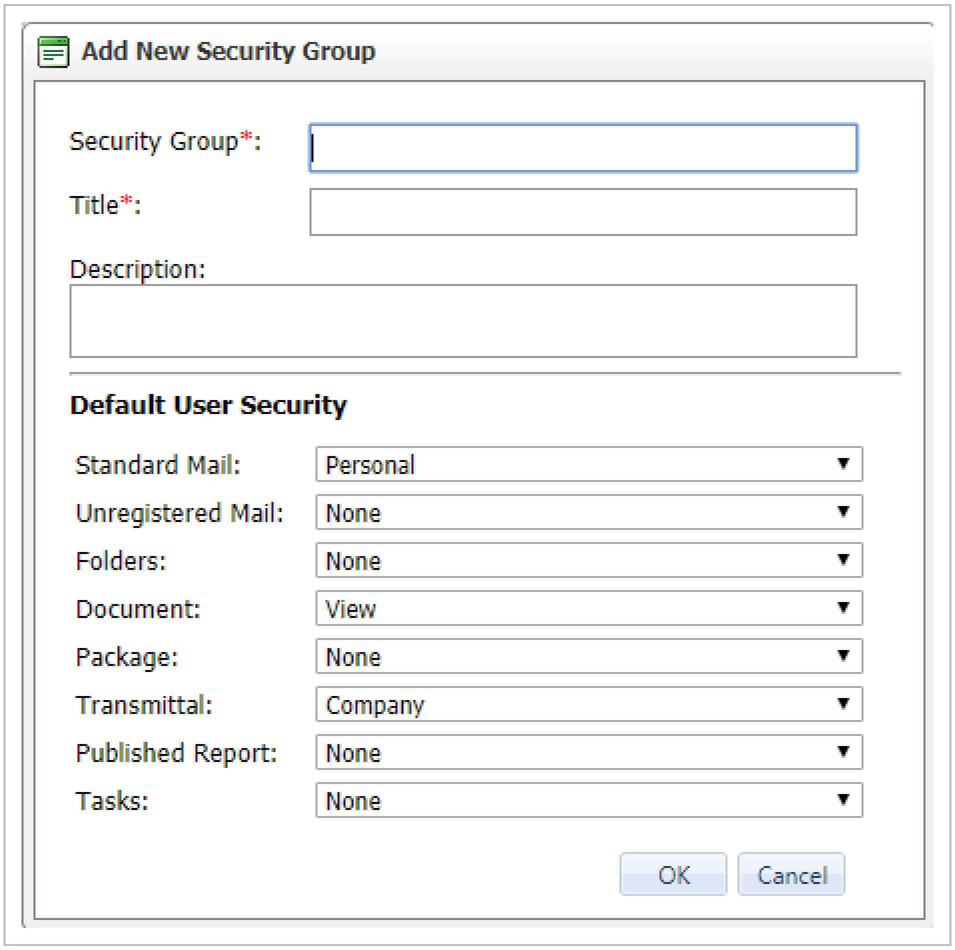
1. Click **Admin** then **Manage User Access.**



2. Click **New** and enter a Security Group code and Title.



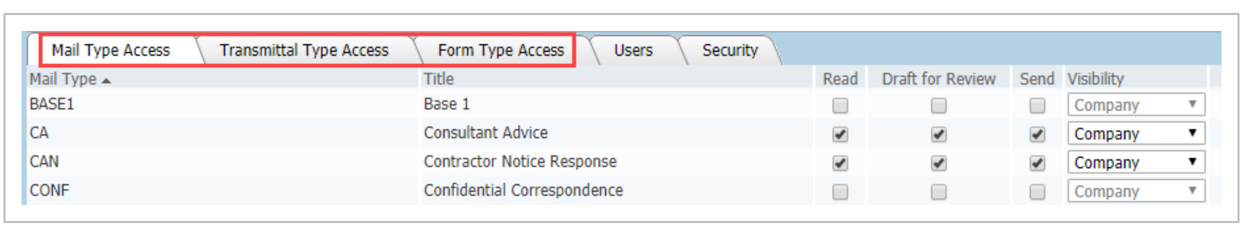
3. A Description can be entered to describe the purpose of the group. This will allow additional administrators to easily identify security groups when adding new users.



4. Select the default user security level of access to each of the InEight Document modules.
5. Click **OK**.

3.8 CONFIGURE SECURITY GROUP ACCESS BY TYPE

1. From **Manage User Access** select a **Security Group** from the top grid.
2. From the bottom part of the screen under each tab use the tick boxes to configure access to each mail type, transmittal type and form type as required.

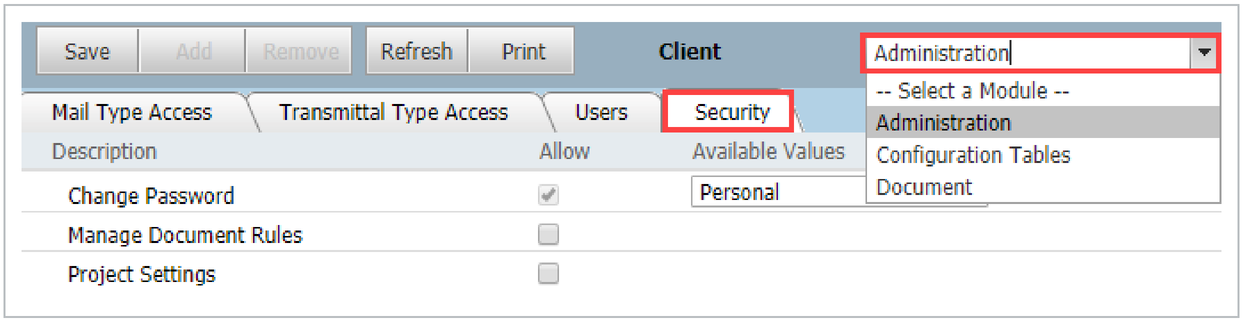


3. If none of the options are ticked within a tab, users in that security group will have no access to that type. The options are shown in the table below:

Type	Description
Mail Type Access	**Read** – gives the user access to view but not create mail of this type. **Draft for Review** – gives the user access to both view and create mail of this type for review but restricts the ability to send mail. **Send** – gives the user access to view, create and send mail of this type. **Note:** Select the required **Visibility** for each Mail type for users assigned to the Security Group using the drop-down list against each Mail Type. The choices are **Personal**, **Department** or **Company**.
Transmittal Type Access	**Read** – gives the user access to view but not create transmittals of this type. **Draft for Review** – gives the user access to both view and create transmittals of this type for review but restricts the ability to send transmittals of this type. **Send** – gives the user access to view, create and send transmittals of this type. **Notes:** • When a new security group is created, the Transmittal type access options are all un-ticked by default. • Only users with **Send** Access to a transmittal type can Send/Resend/Cancel a transmittal of that type.
Form Type Access	**Read** – gives the user access to view but not create forms of this type. **Send** – gives the user access to view, create and send forms of this type.

3.9 DELEGATE ADMIN FUNCTIONS FOR A SECURITY GROUP

1. From **Manage User Access** screen select a **Security Group** from the top grid.
2. From the bottom part of the screen under **Security tab** select the relevant area from the drop down on the right to delegate in the areas of Administration, Configuration Tables and Document.



3. The options include:

Type	Description
Administration	**Change Password** – allows passwords to be change at a Personal or Company level. **Manage Document Rules** – allows access to change Upload, Review Y/N, Review Initiator, Review Team and Distribution Rules. **Project Settings** – gives the user the ability to change any of the Project Settings.
Configuration Tables	**Create New** – gives the ability to Create items in Configuration Tables specified in the ‘Available Values’. **Edit** – gives the ability to Edit items in Configuration Tables specified in the ‘Available Values’. **Delete** – gives the ability to Delete items in Configuration Tables specified in the ‘Available Values’.
Document	**Change Document Details** – expand the option to specify which documents details can be changed, if required. **Delete Documents** – allows the user to delete documents. **Replace/Remove View Files**– allows the user to replace/remove view files. **Transfer Document Ownership** – allows the user to transfer document ownership. **Note:** For each function choose between: Documents I have uploaded; and Documents my company have uploaded.

NOTE

- Users given permission for one or more of these functions can only apply the function to documents to which they have access.
- The settings for the Open User level cannot be changed. This level provides Project Administrators full access to all mail types within InEight Document Mailboxes.
- Security Levels are allocated to users via the **Manage User Access** screen, or from within the Address book using the **User Security** tab.
- New users added to a security group inherit the default settings for the group. If default settings are updated for the group all users with the default settings will be updated with the new settings automatically. Users with different settings from the group default settings will be updated only if selected for update (the Administrator will be prompted with a list of affected users).
- **Duplicate** is used to create a new Security Group with similar mail type access, transmittal type access and form type access.
- In **Contacts** make the 'Security Group' visible by customizing the register to locate contacts who are not allocated to a Security Group.
- The options under Change Document Details contain standard Document fields. Custom fields can be added upon request.

3.10 ADDING USERS TO SECURITY GROUPS IN BULK

Project participants requiring access in InEight Document to send communications, upload documents, generate transmittals, etc. must be defined as InEight Document users.

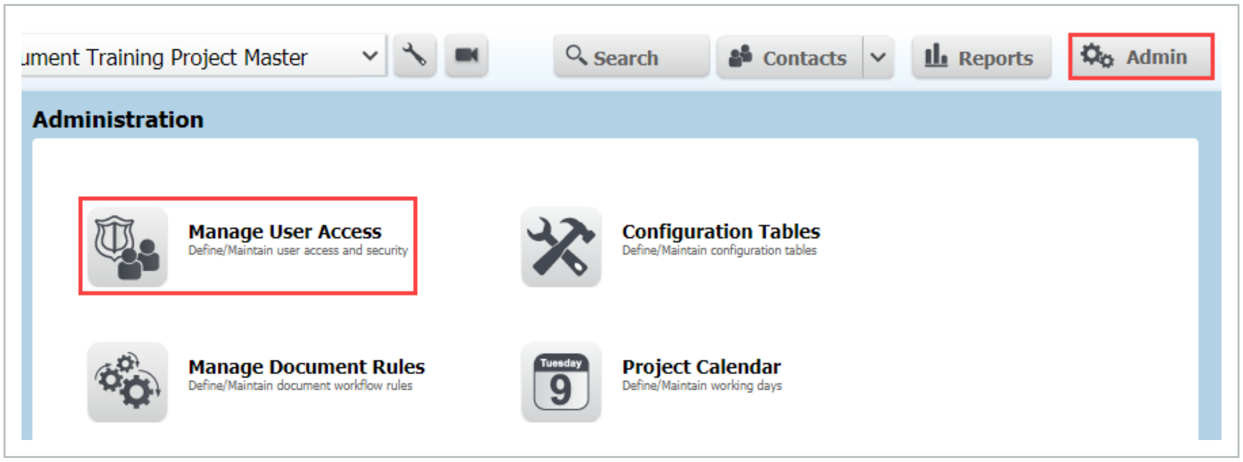
The process of creating a new user involves:

1. Adding the person to the Address Book.
2. Assigning the person to a Security Group.
3. Setting the persons access levels to the various modules of InEight Document.
4. Adding the person to a Document Distribution Rule set (optional).

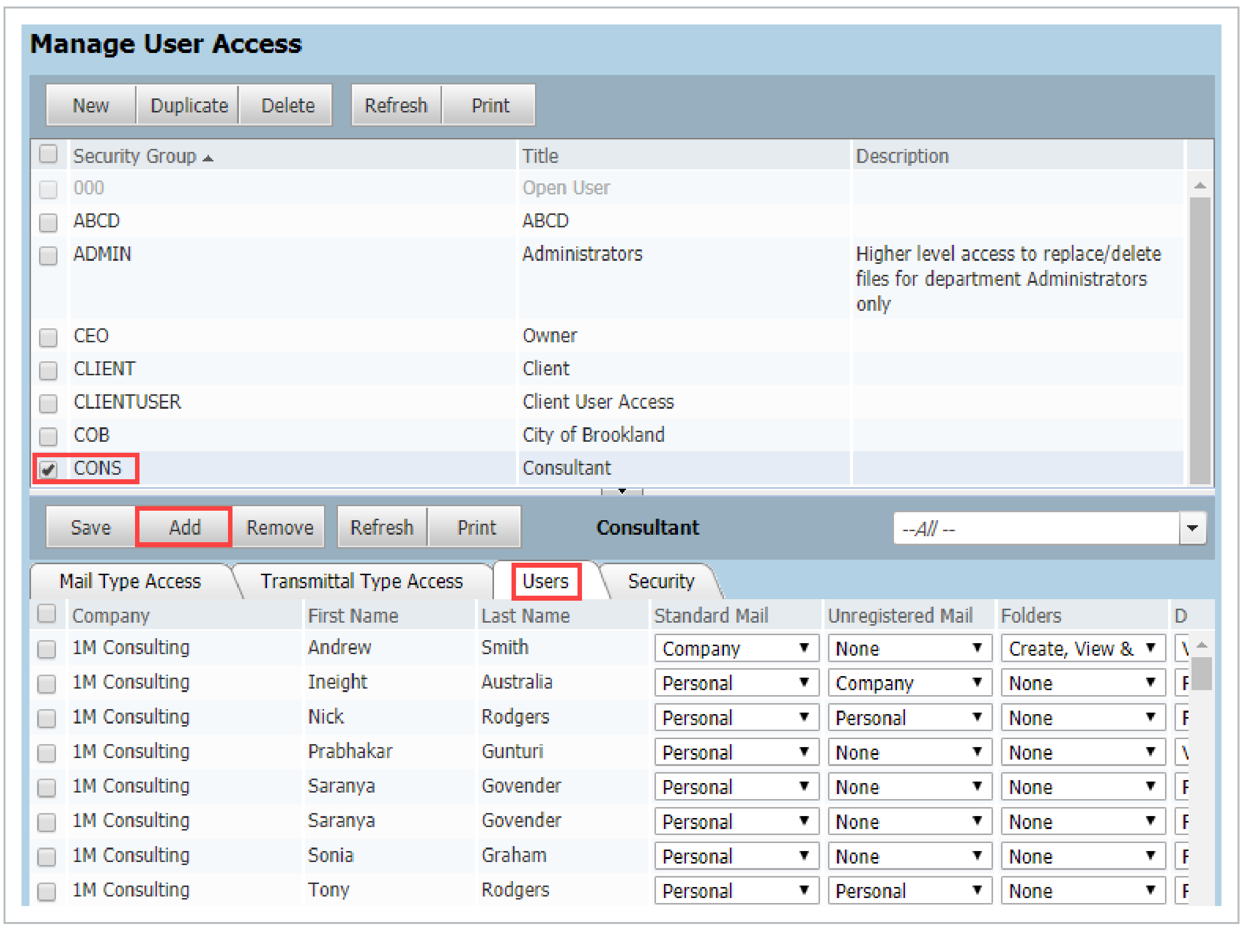
The minimum steps to enable someone to login to InEight Document are to add to the Address Book and allocate to a Security Group.

To create add a User to a Security Group:

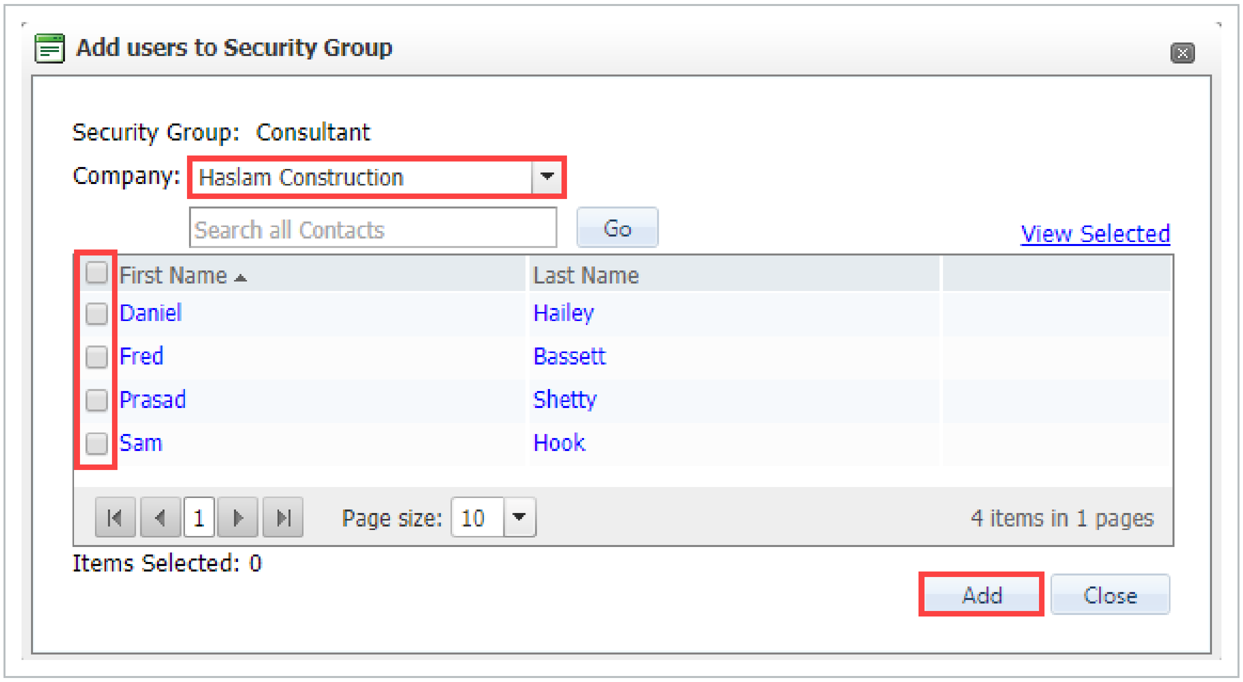
1. The user must be created in the Address Book as a contact.
2. Go to **Admin**, **Manage User Access**.



3. Click on a **Security Group** from the Upper grid the users will be assigned to.



4. Click the **Users** tab in the lower window.
5. Click the **Add** Users.
6. At **Add users to Security Group** select the company then the contacts.

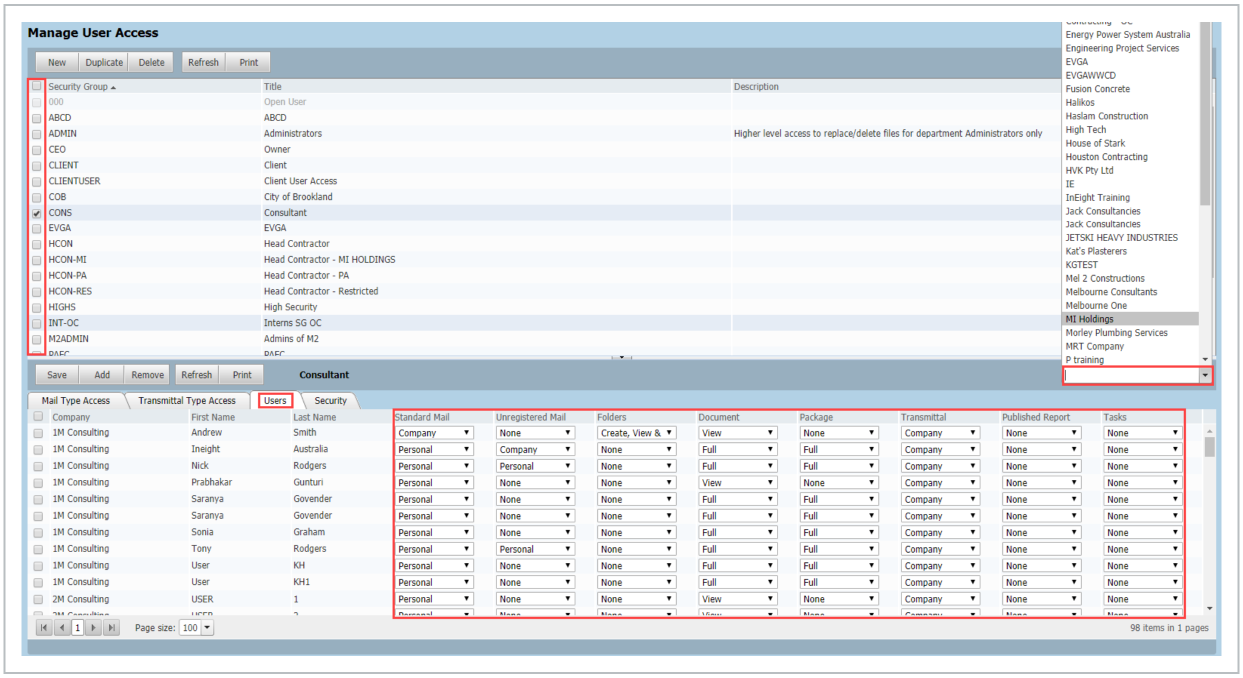


7. Click **Add** to add these contacts to the security group.
8. The users allocated to the security group can be viewed from the **Users** tab.

NOTE When a contact is added to a security group the system will prompt to send a welcome notification to the new users.

3.11 CONFIGURE USER ACCESS TO MODULES

1. From **Manage User Access** screen select a **Security Group** from the top grid.



2. From the bottom part of the screen under **Users** tab select contact and adjust the access to modules as required.
3. Use the Company filter for longer lists to find the contact.
4. The different levels of access are:

Module	Levels
Standard Mail Unregistered Mail Transmittal Tasks	**None** – not visible **Personal** – user is in the TO, CC, BCC or FROM values on the distribution **Department** – user of the same department is any of the TO, CC, BCC or FROM values on the distribution **Company** – anyone from the user's company is any of the TO, CC, BCC or FROM values
Folders	**None** – not visible **View** – can view folders and items based on module access level **View and Allocate Items** – can view folders and add / remove items subject to module access level

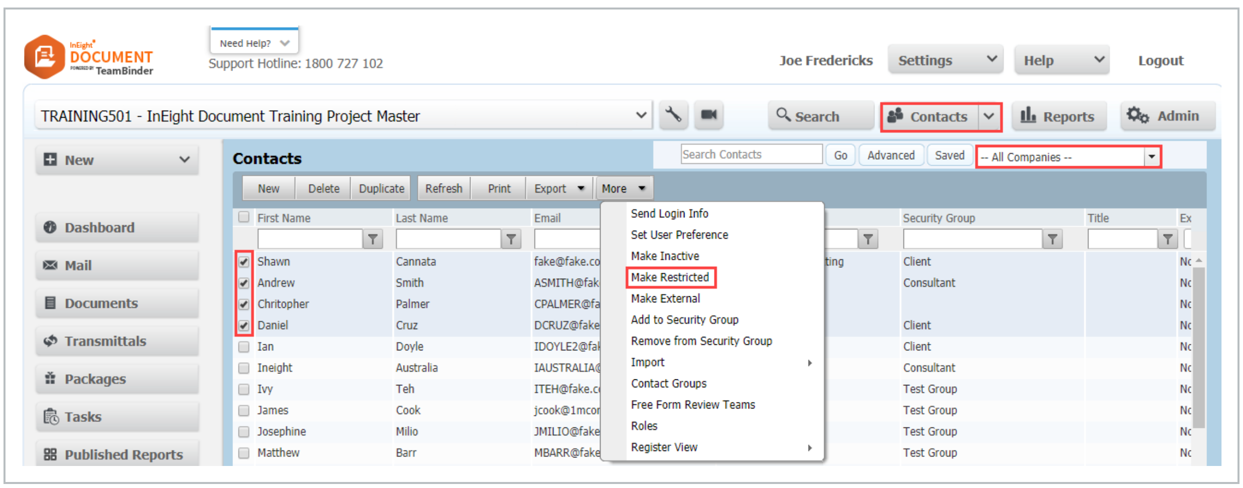
Module	Levels
	Create, View and Allocate Items – can create new folders and add / remove items subject to module access level
Document Package Published Report	**None** – not visible **View** – can access and download but cannot create **Full** – full access

3.12 RESTRICTED USERS

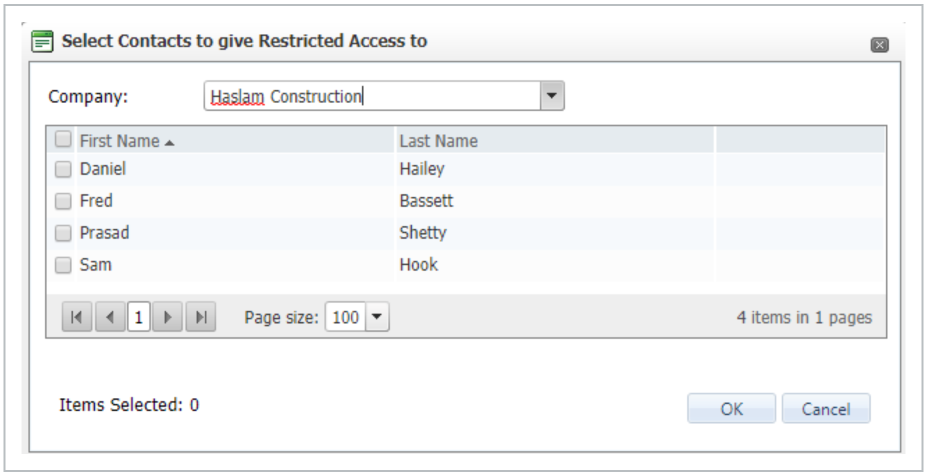
A restricted user only sees a limited section of the address book. This may be required for privacy reasons, for example to restrict a subcontractor to only communicate with the prime contractor and not the engineering consultants or the client.

To make one or more Users Restricted:

1. Go to **Contacts** and filter for the **Company**.
2. Select the contacts to be made restricted.



3. From **More** select **Make Restricted** and **Yes** when prompted.
4. Open the contact, from the **Restricted Access** tab click **Add** choose the company, then select the contacts you want the user(s) to be able to see in the address book.



5. Repeat steps for additional companies and contacts.
6. Click **OK**
7. Click **Save** and **Close**.

NOTE

- Restricted Users are displayed in blue in Contacts.
- The contacts a restricted user can see are listed in the Restricted tab within the contact details window.
- If a company administrator has been defined as a restricted contact, all the users they create will also be restricted automatically and the list of restricted contacts that the administrator has access to will automatically be carried forward to the new users.

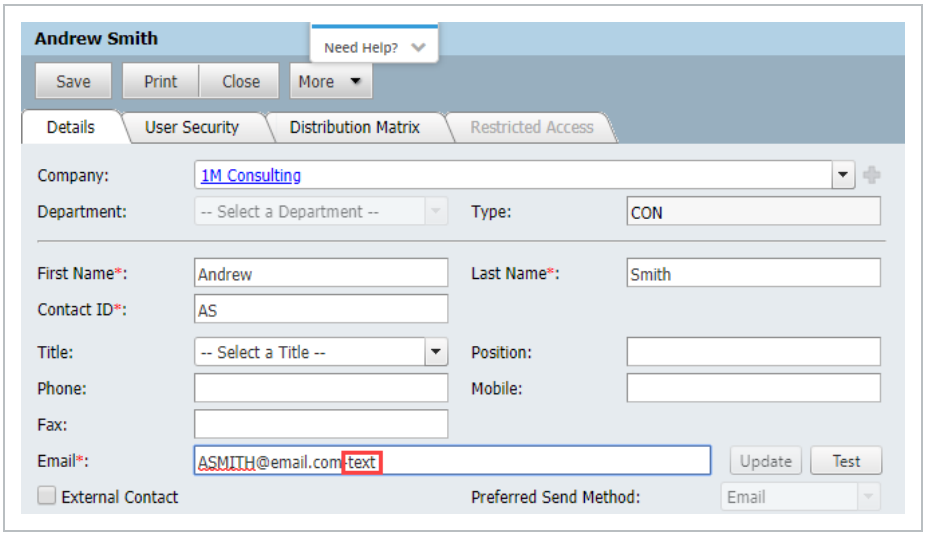
3.13 PLAIN TEXT EMAIL NOTIFICATIONS

InEight Document notifications use the latest HTML technology for formatting purposes. The use of HTML enables the notifications sent by InEight Document such as mail (for external contacts), mail notifications, document notifications, transmittals etc. to appear in a high-quality format rather than as unformatted text.

Some Email systems do not support HTML formatted emails so InEight Document notifications may not be displayed correctly. InEight Document can support plain text email notifications . where the notification will be rendered in plain text rather than HTML ensuring the message/information is clear.

To activate plain text emails for a contact:

1. Click **Contacts** and filter and open the required contact.
2. In the email field, add a suffix "**-text**", minus the quotation marks. For example, if the contacts email address is frank@houston.com you would change this to **frank@houston.com-text**



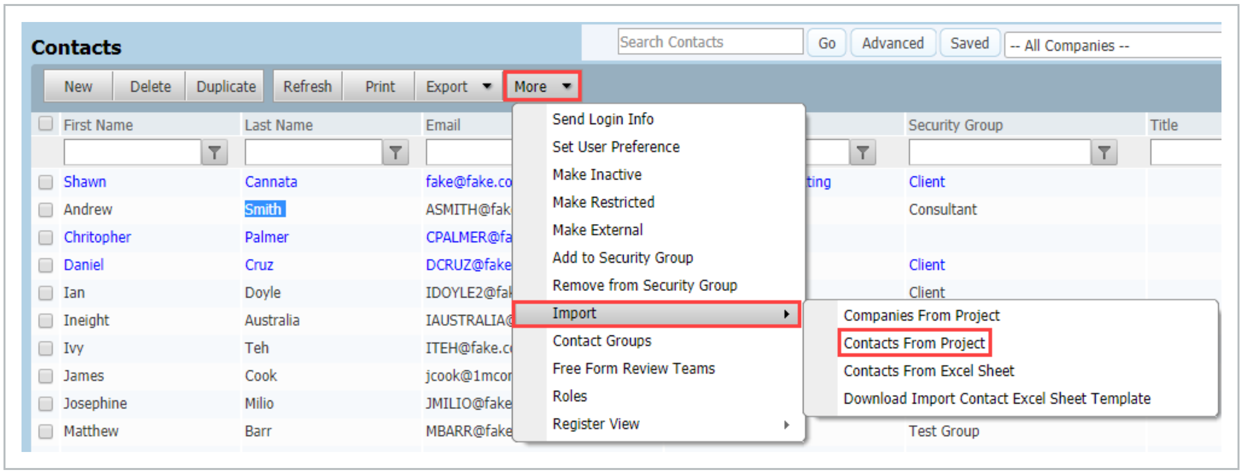
3. InEight Document will then send all notifications in plain text to this contact.

3.14 IMPORT CONTACTS FROM ANOTHER INEIGHT DOCUMENT PROJECT

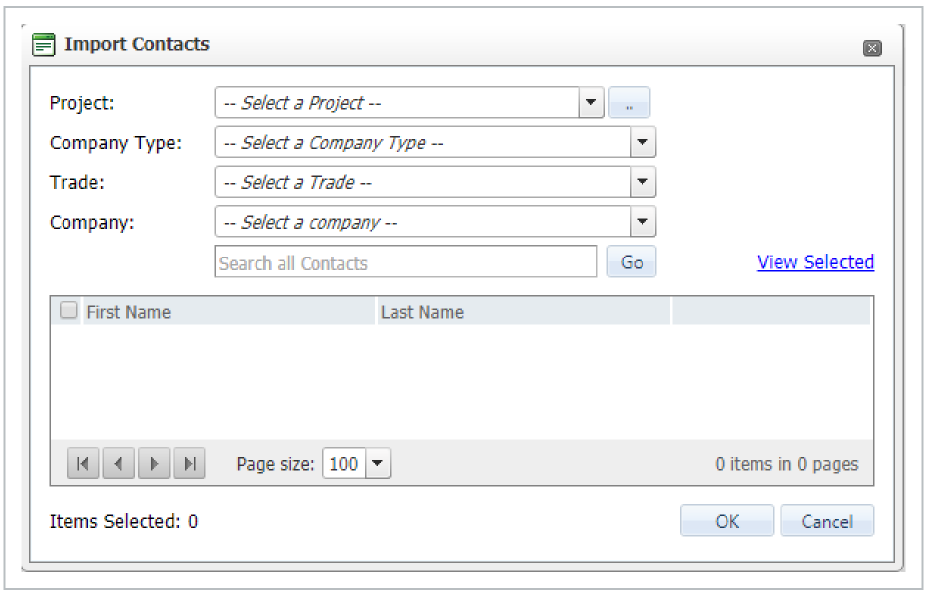
Company and Contact details can be imported from other InEight Document Projects the Project Administrator has access to.

To import Contact List from another InEight Document Project:

1. Click **Contacts**, from **More** go to **Import**, **Contacts from Project**.



2. Select the project from the drop-down list.



3. Select the company, you can search for the companies available using the Type and Trade drop down lists.
4. Select the contacts to import.
5. Use the **View Selected** link to check which contacts you have selected.
6. Click **OK** when done.
7. You will receive a message advising that the import has been completed successfully.

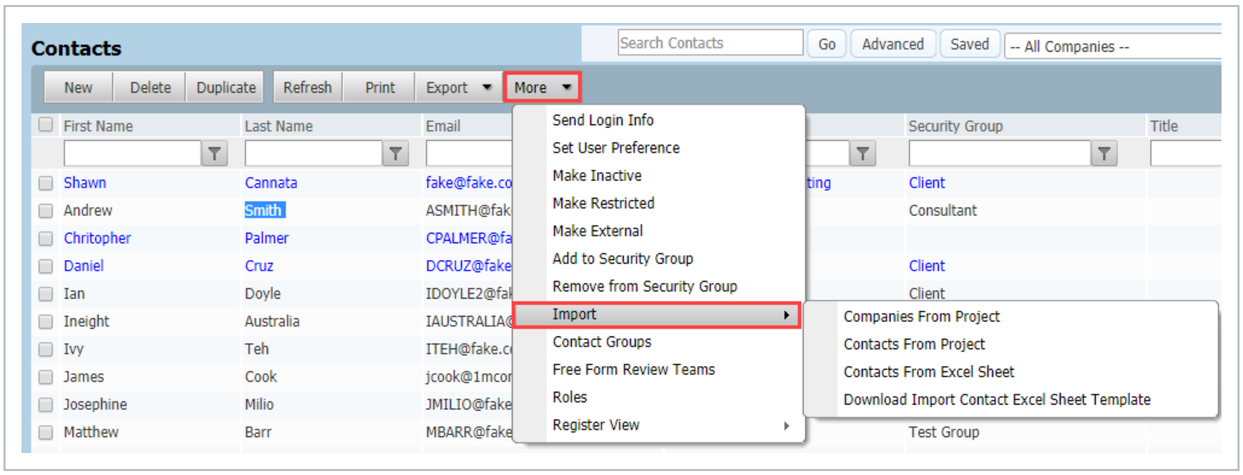
NOTE If the login details for the project you want to import contacts from is not the same as your current login, use the option to login as a different user to the right of the project drop down list.

3.15 IMPORT CONTACTS FROM MS EXCEL

Company and Contact details can be imported from an MS Excel worksheet. The import MS Excel sheet needs to be downloaded, completed, saved then imported.

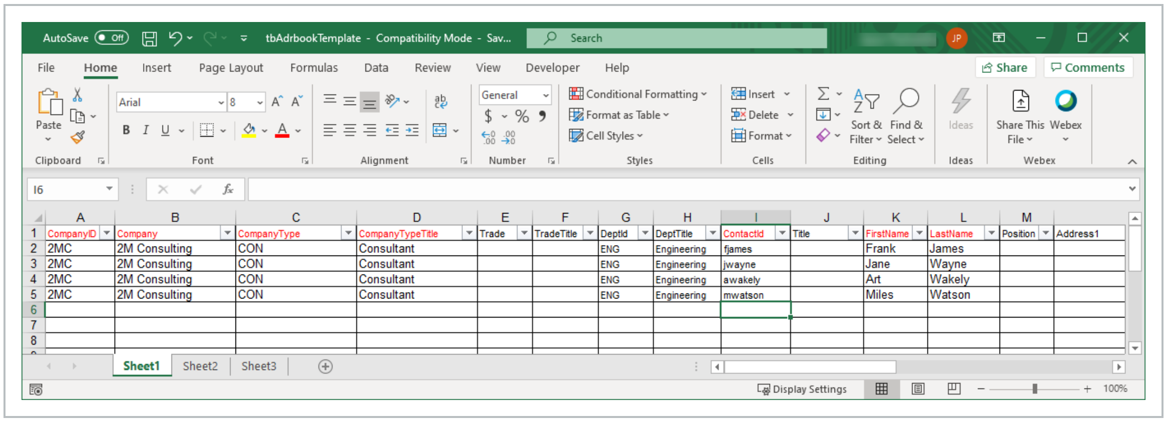
To import Contact List from MS Excel:

1. Click **Contacts**, from **More** go to **Import**, **Download Import Contact Excel Sheet Template**.

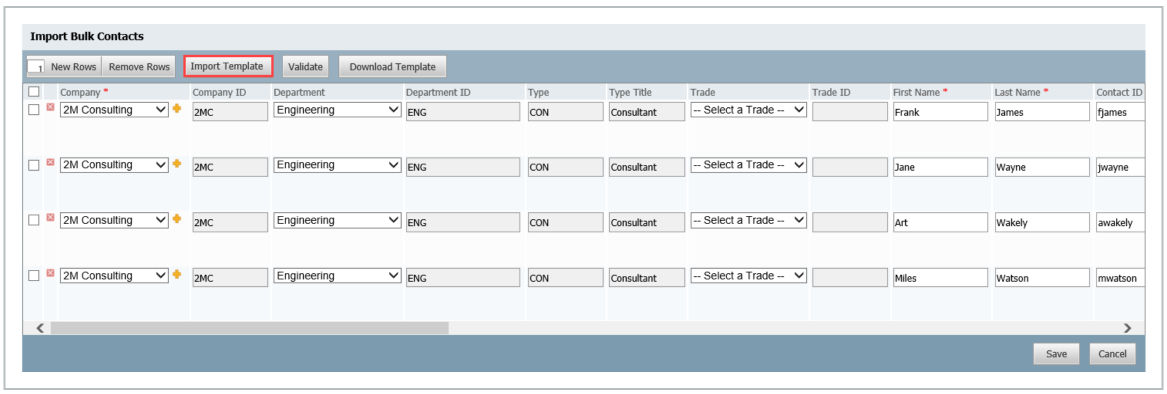


2. Open the Excel template and save it to your computer.
3. Populate the excel template with the details of the contacts. Key fields (highlighted in red) are as follows:
   - Company ID, Company, Company Type, Company Type Title
   - Contact ID, First Name, Last Name

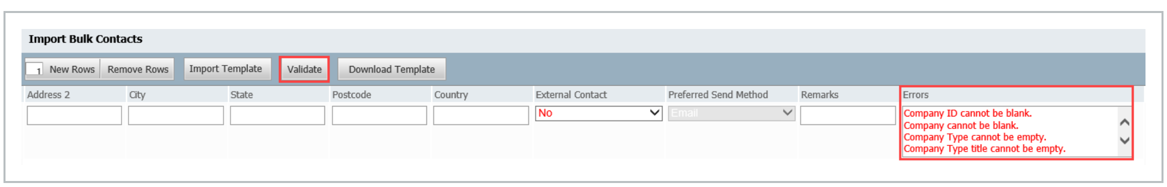
- Email, Address Line 1



- Once finished, click **Contacts**, from **More** go to **Import**, **Import Contacts from Excel Sheet**.
- At the Import Bulk Contacts window choose **Import Template**, select the Import file populated.



- The rows on the Import Bulk Contacts window will populate automatically based on the information in the import file.
- Click **Validate** and scroll to the right hand side of the window to view any errors.



8. Fix any errors and click **Save** when done.
9. Click **OK** when prompted and **Cancel** to return to the address book.

NOTE

- If new companies and/or departments are found in the Import file, these will automatically be added to the InEight Document Companies and Departments lists.
- It is also possible to import just a list of Companies without contact details using the process above.
- When importing a contact list from MS Excel into the InEight Document Address book, you can mark one or more contacts as External Contacts.

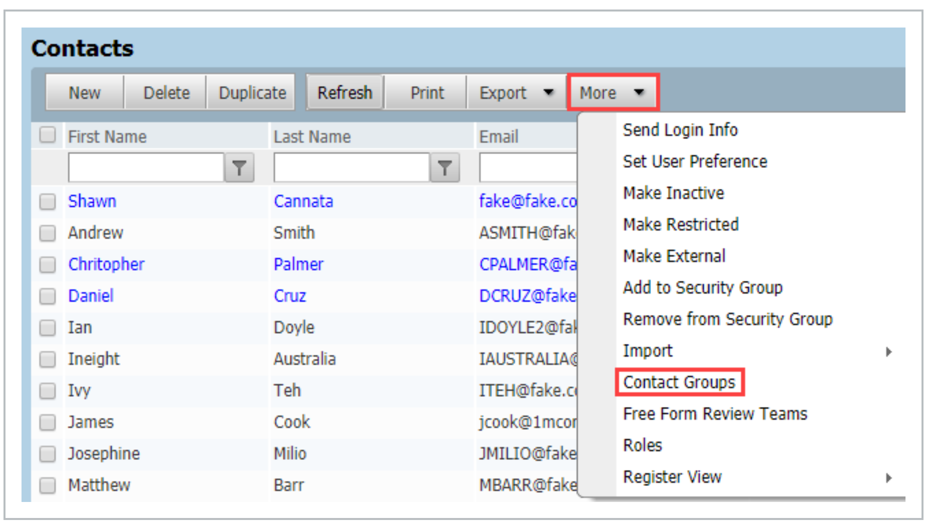
3.16 CONTACT GROUPS

Contact Groups can be setup on a per user basis and made available to other users from within the same company.

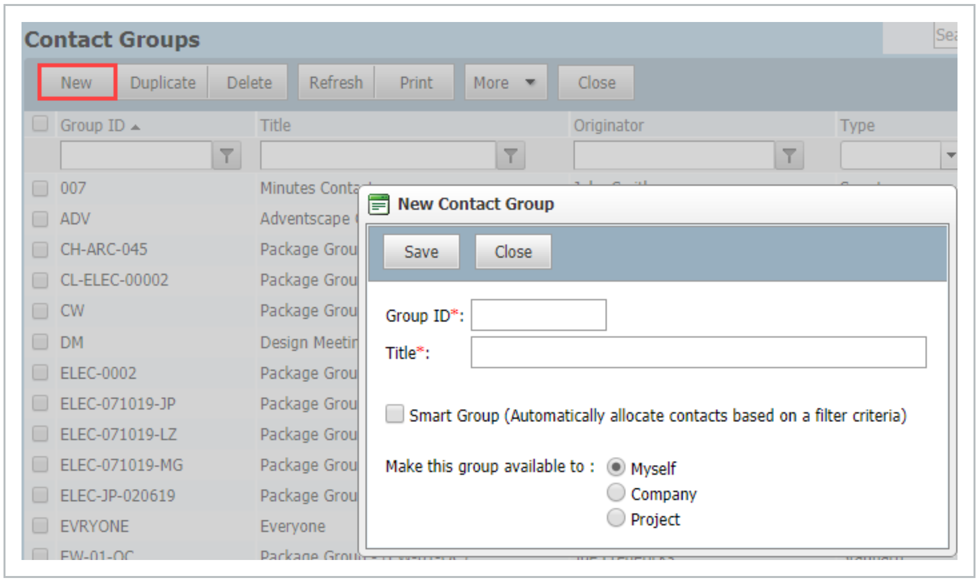
A Smart Contact Group is populated/updated automatically with existing/future contacts based on a defined filter criteria.

3.16.1 To setup a Contact Group

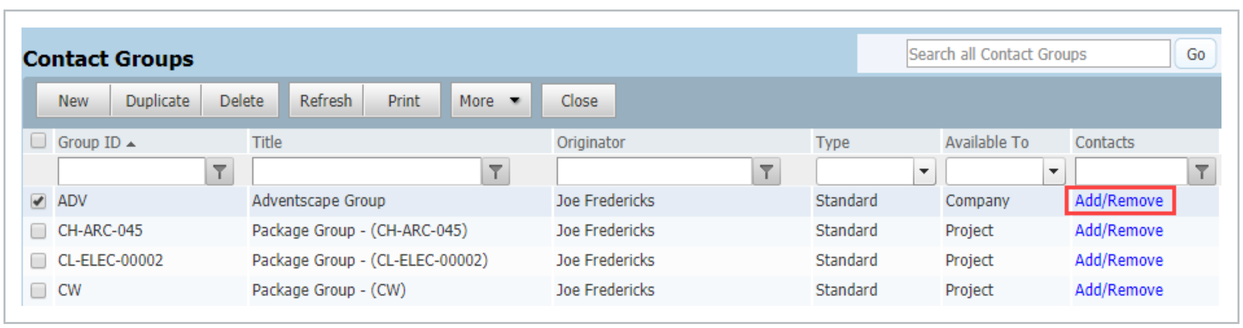
1. From **Contacts**, **More**, select **Contact Groups**.



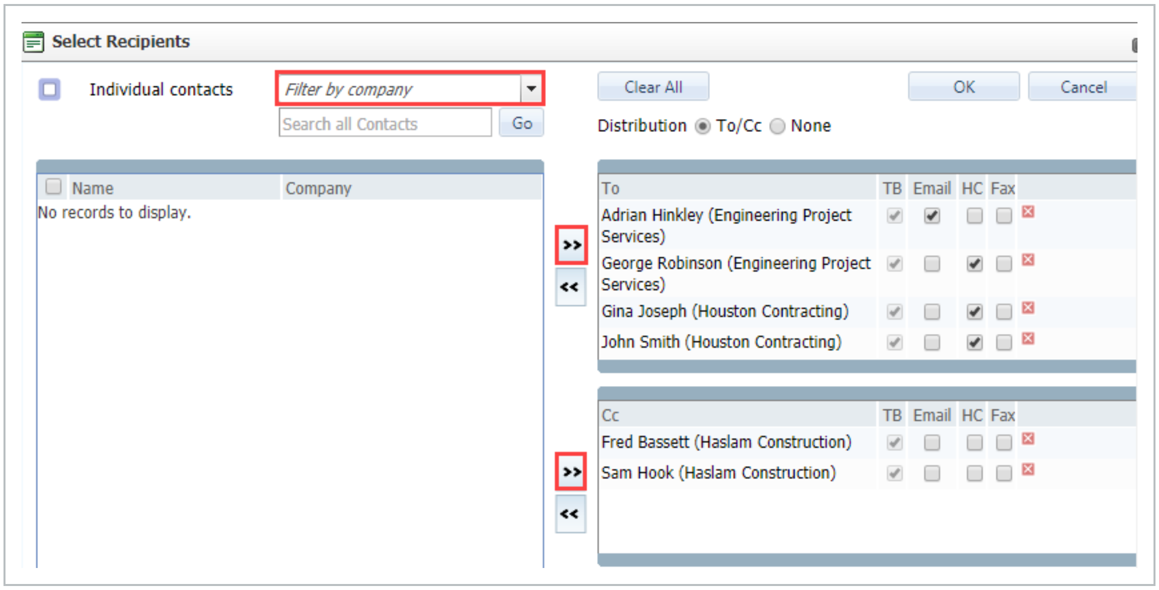
2. Click **New**, enter the Group ID and Group Title.



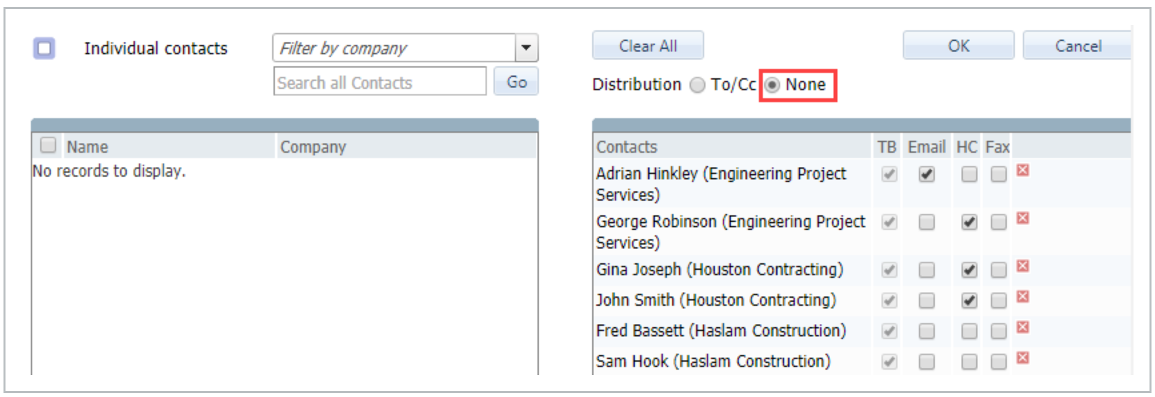
3. Tick the box labelled **Make this group available to** users from my **Company** or **Project** as required.
4. Click **OK**, your newly created Contact Group will be shown in the list.
5. To add contacts to this distribution group, click **Add/Remove** link.



6. For the **Distribution** option **To/Cc**, filter the company and contacts to add into either TO, CC or BCC boxes.



7. For the **Distribution** option **None**, add the members of the Contact Group to a single section.



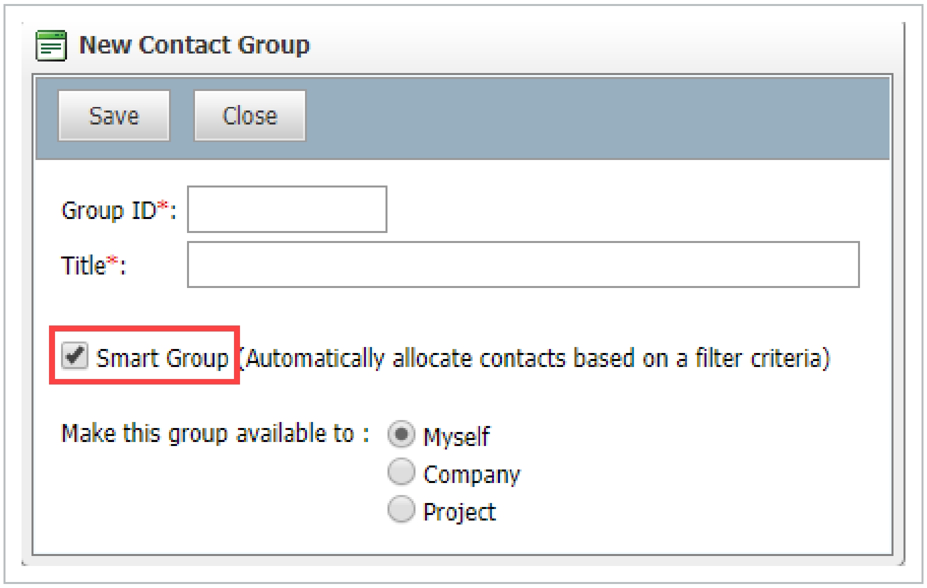
8. Click **OK**.

NOTE

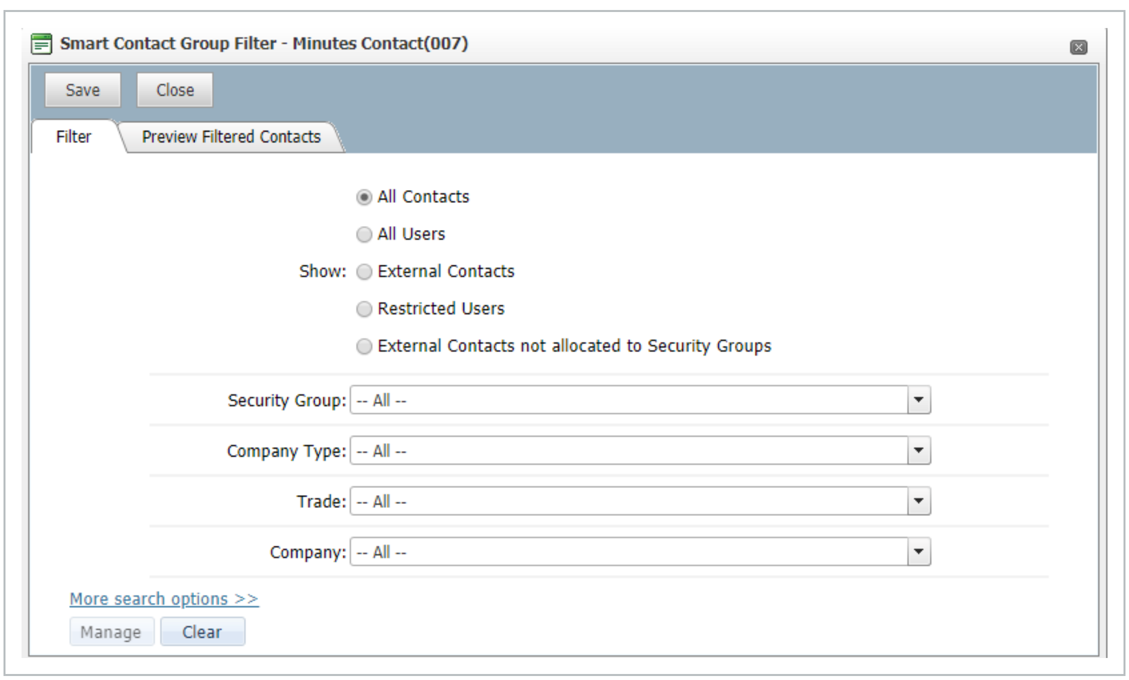
- The BCC option will only be available if Blind Copies has been activated on the Project.
- Use **More** to: **Add Contacts** in bulk; **Remove Contacts** in bulk; or **Replace Contact** in bulk.

3.16.2 To create a Smart Contact Group

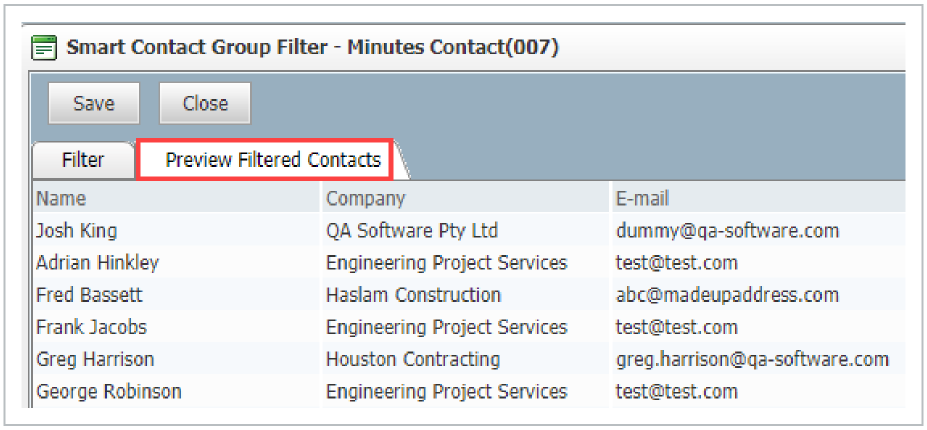
1. Create a new Contract Group, select **Smart Group**.



2. At the Contacts Group list, click the link.
3. Define the required filter from the options available to automatically add contacts to the smart contact group.



4. Use the tab to check your filter settings.



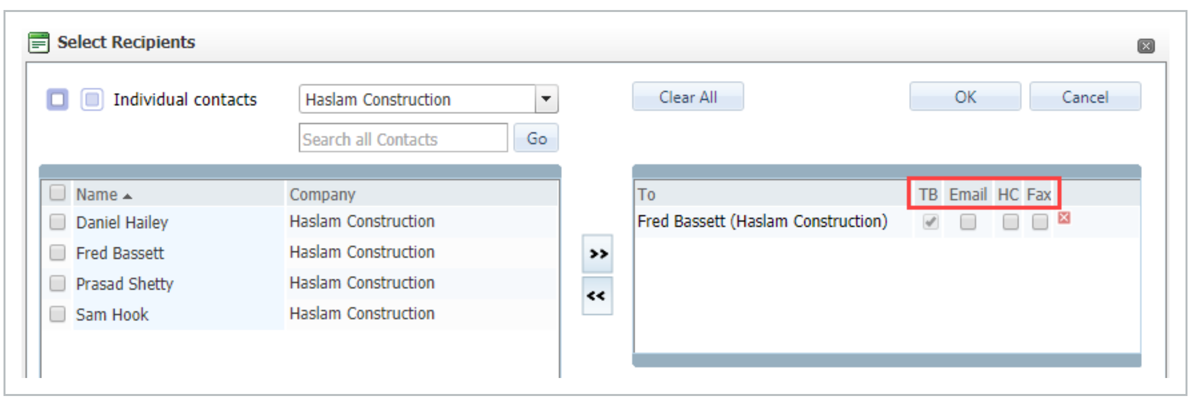
5. Click **Save**.

NOTE

- You cannot manually add contacts to a smart Contact group
- If an existing contact group is changed to be a smart contact group, the allocated contacts will be removed.

3.17 SEND METHODS

The default send method for each contact is defined via Contacts but can be adjusted via the **Select Recipients** window when creating mails.



There are four ways that mail can be delivered (sent) using InEight Document:

1. **TB** – This column is always ticked. As this column cannot be un-ticked, every mail sent from InEight Document will be delivered to the recipients InEight Document Inbox regardless of whether they are a user of InEight Document, in addition to any other options you select.
2. **Email** –InEight Document will send this recipient the mail via email. They will receive the mail in

their normal email inbox, as well as their InEight Document inbox. When ticking this box, the system will check that the user has an email address. This option is the default when sending mail to External Contacts.

3. **FAX** – the mail will be sent out using InEight Document's Fax-Out Integrated fax service. This is an optional service where charges apply and is enabled on a per company per project basis. When ticking this box, the system will check that the contact has a valid fax number and that Fax-Out is enabled for your company.
4. **HC** –InEight Document will flag that this recipient is to be sent the mail via hardcopy. Upon sending, InEight Document will automatically load a print preview so that a printout can be generated. This option is often used on site where it is more convenient to hand a copy of a mail to a recipient rather than send by email, fax or InEight Document.

NOTE

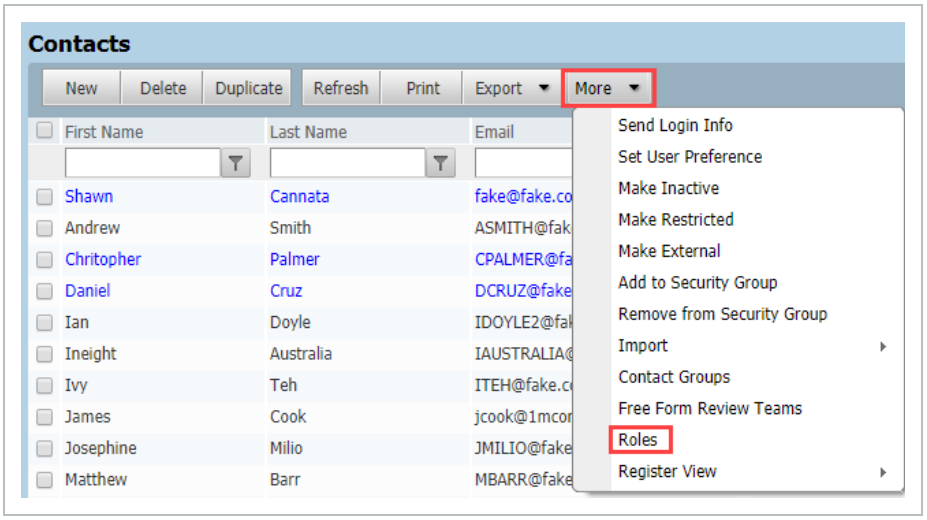
- InEight Document captures both the date and time mail is sent based on the time zone selected for the project via the Project Settings.
- The method used to send each mail item can be viewed by right clicking on a mail in **Sent Items** and selecting **View Sent Methods**.

3.18 ROLES

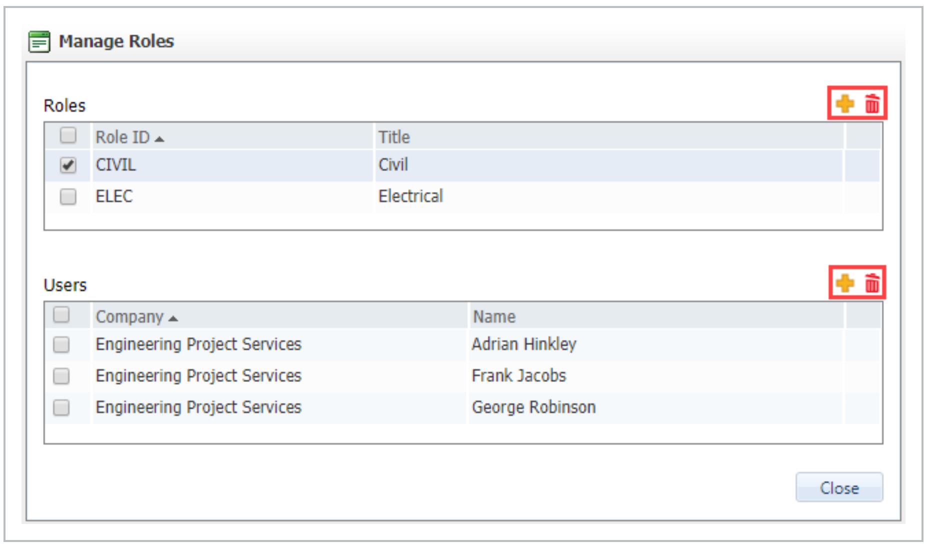
Roles let project teams update users performing a similar role to be grouped together in one location and have updates mirrored in the appropriate areas automatically. With constant turnover in project personnel, it becomes cumbersome to add and remove users in different areas.

To create Roles:

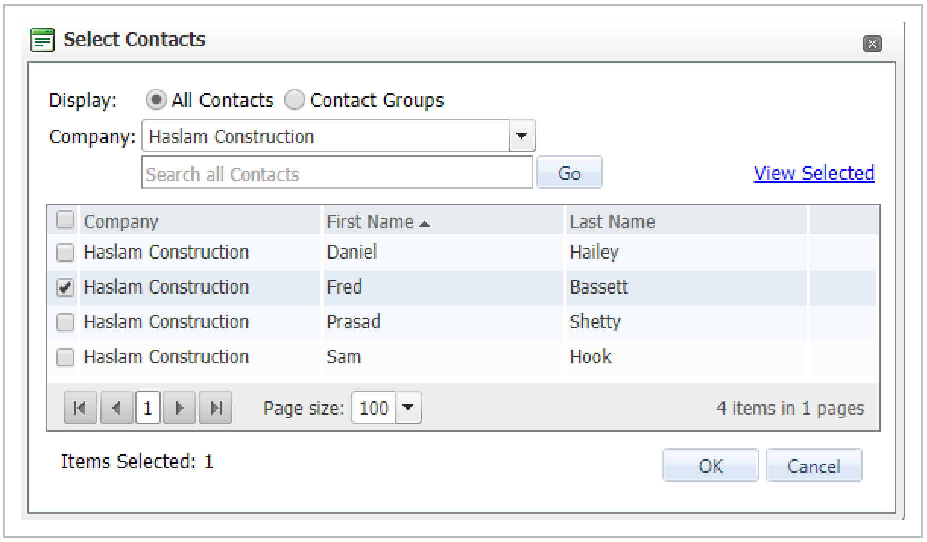
1. From **Contacts**, select **More** then **Roles**.



2. Use the **Roles** pane to add or delete roles



3. Use the **Users** pane to select the company and users to be added to a role.



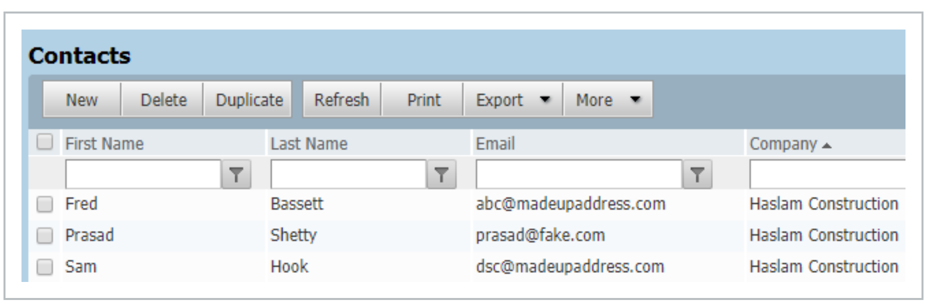
4. Click **Close**.

> **NOTE** Roles can be used in Review Initiator, Review Coordinator, Review Teams, Restricted Document Access and Packages.

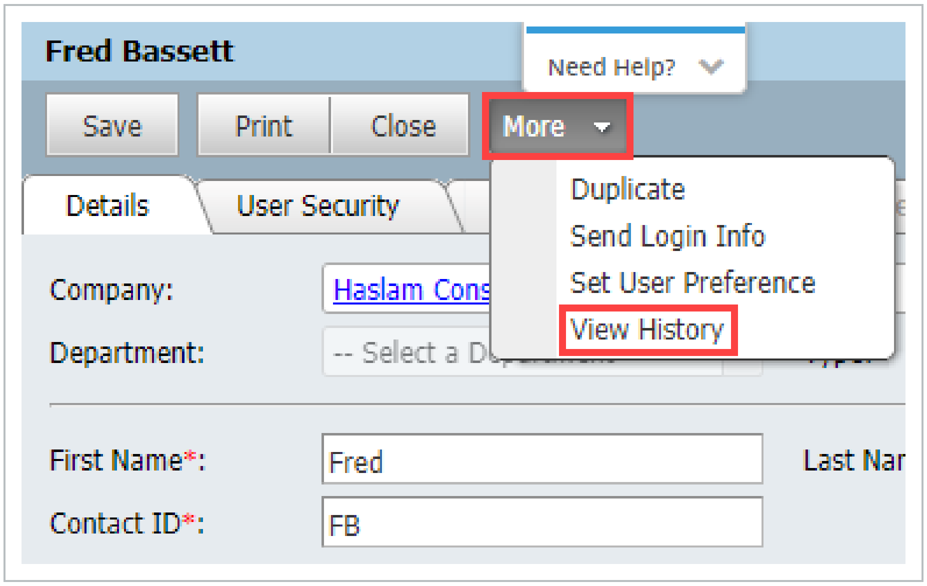
3.19 USER AUDIT LOG

The User Audit Log tracks user actions within the project, no matter which module they have or are currently working in. The User Audit Log tracks user usage and allows an administrator to verify their access to use certain modules.

1. Click **Contacts**, locate and open the user detail.



2. In the contact screen click **More**, then **View History**.



3. In the audit log filter and search in the columns.

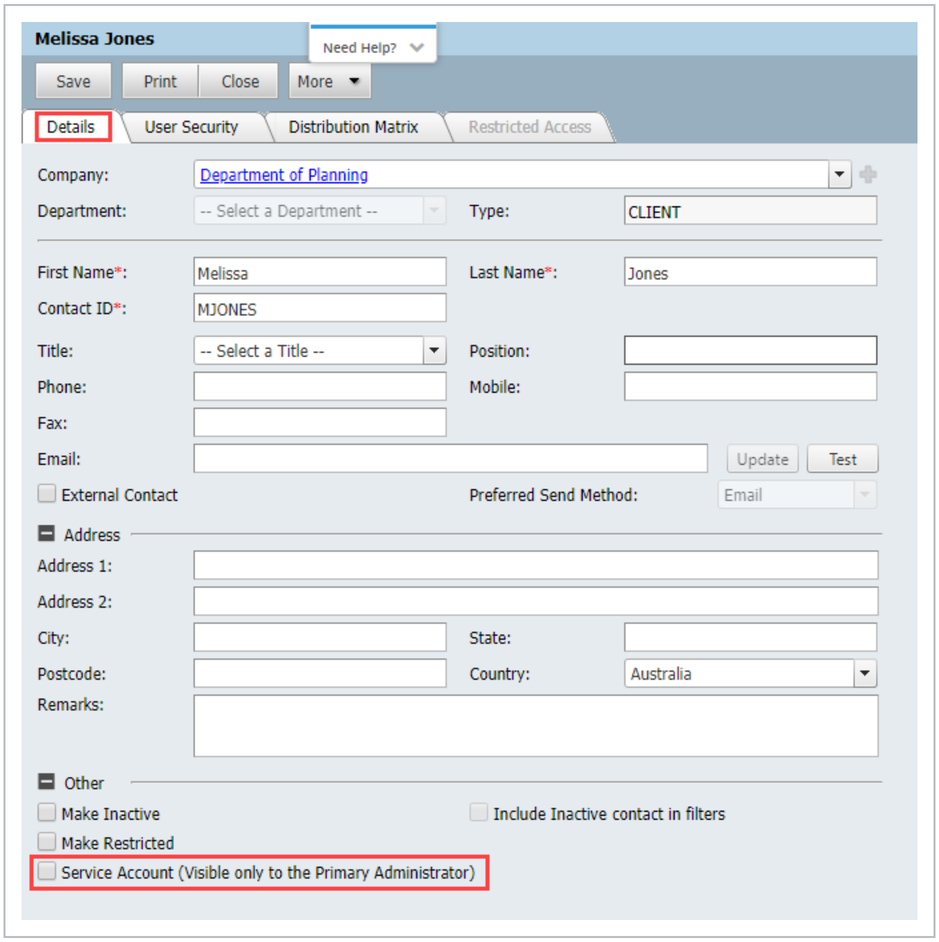
3.20 MARKING A CONTACT AS A SERVICE ACCOUNT

A project might want to designate a certain contact as a Service Account. This is useful for integrations with other systems.

To make a Contact a Service Account:

1. Click **Contacts**, locate and open the user detail.
2. On the **Details** tab under Other, select **Service Account (Visible only to the Primary**

Administrator).



NOTE

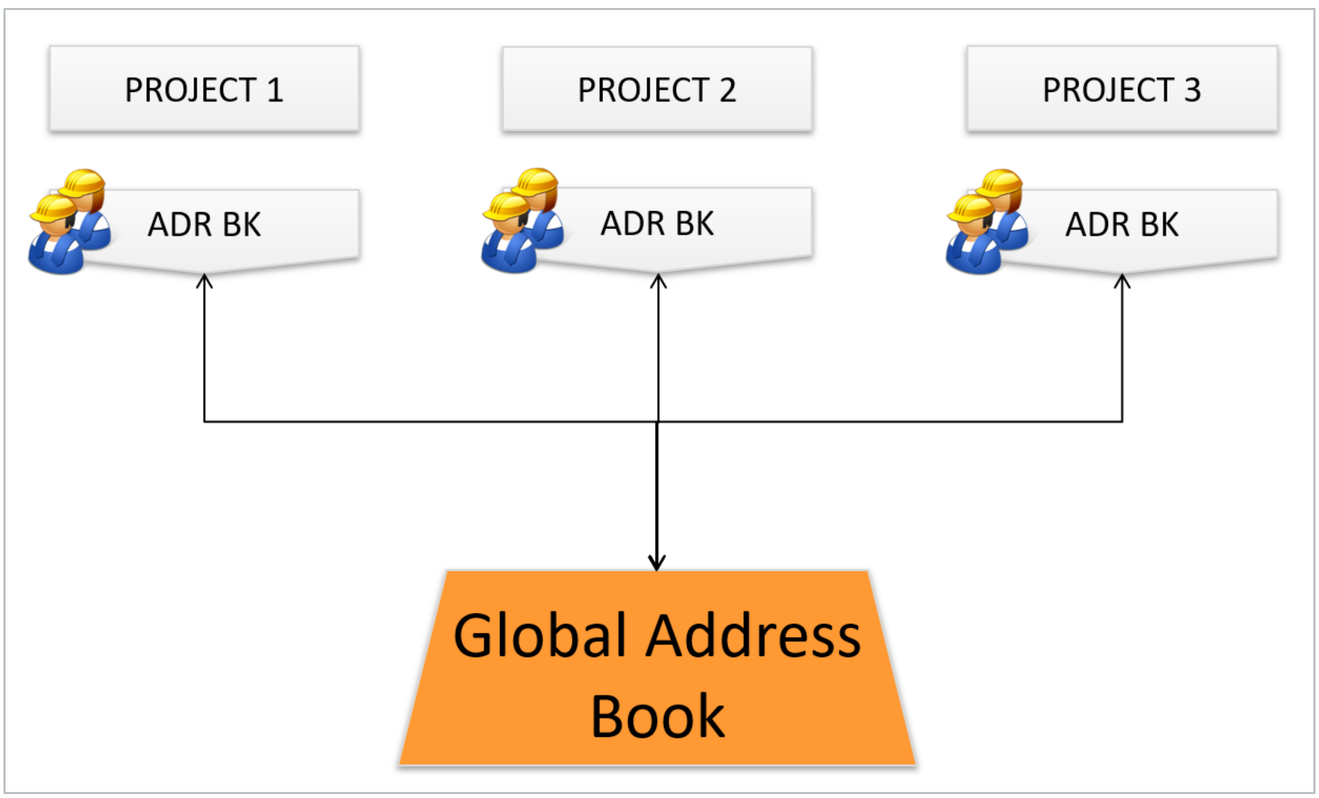
- Primary Administrators are the only users that can see the Service Accounts within the Contacts area.
- All actions are captured on usage logs and the Service Account is visible on the audit log.
- Contact the support team if you would like to have this enabled.

CHAPTER 4 – USING A GLOBAL ADDRESS BOOK

4.1 OVERVIEW

A Global Address book is used to centralize the process of maintaining contact details.

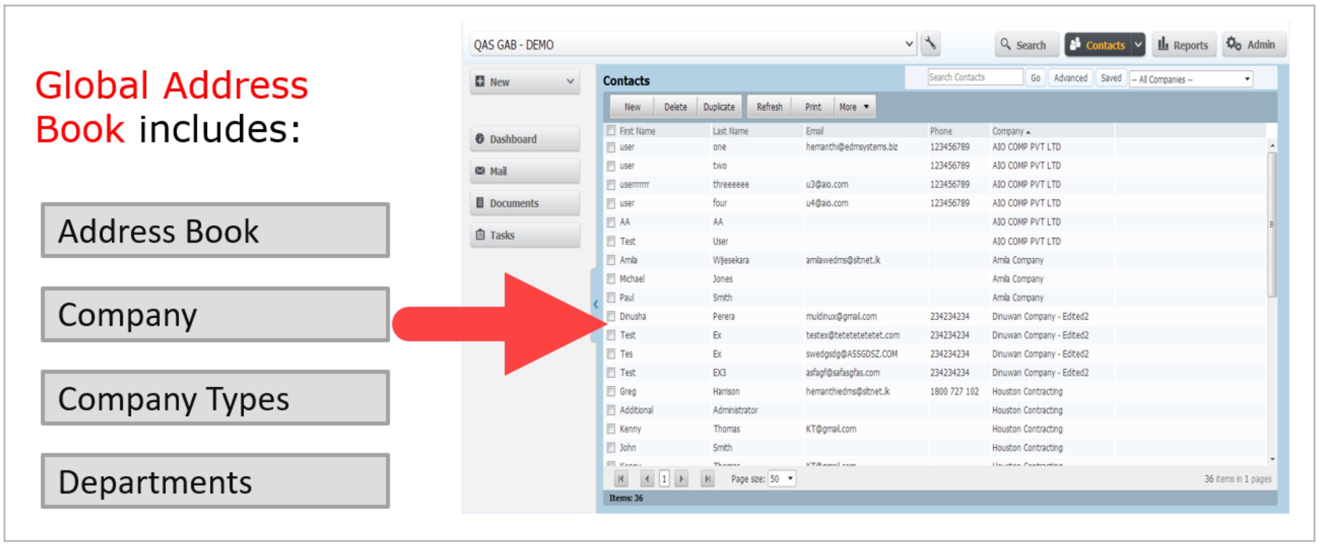
The Global Address book is maintained via a special project created on request by InEight. This project is then linked to other active projects.



4.2 GETTING STARTED WITH THE GLOBAL ADDRESS BOOK

Once setup, all active projects will be automatically linked to the Global Address Book (GAB) Project. Existing contacts within linked projects will not be automatically linked.

To link these contacts the address books from linked projects are imported into the Global Address book starting with the project with the largest address book. InEight can then assist with building the links for existing contacts in linked projects back to the Global Address Book as the import process FROM a linked project TO the Global Address book does not build an automatic link.

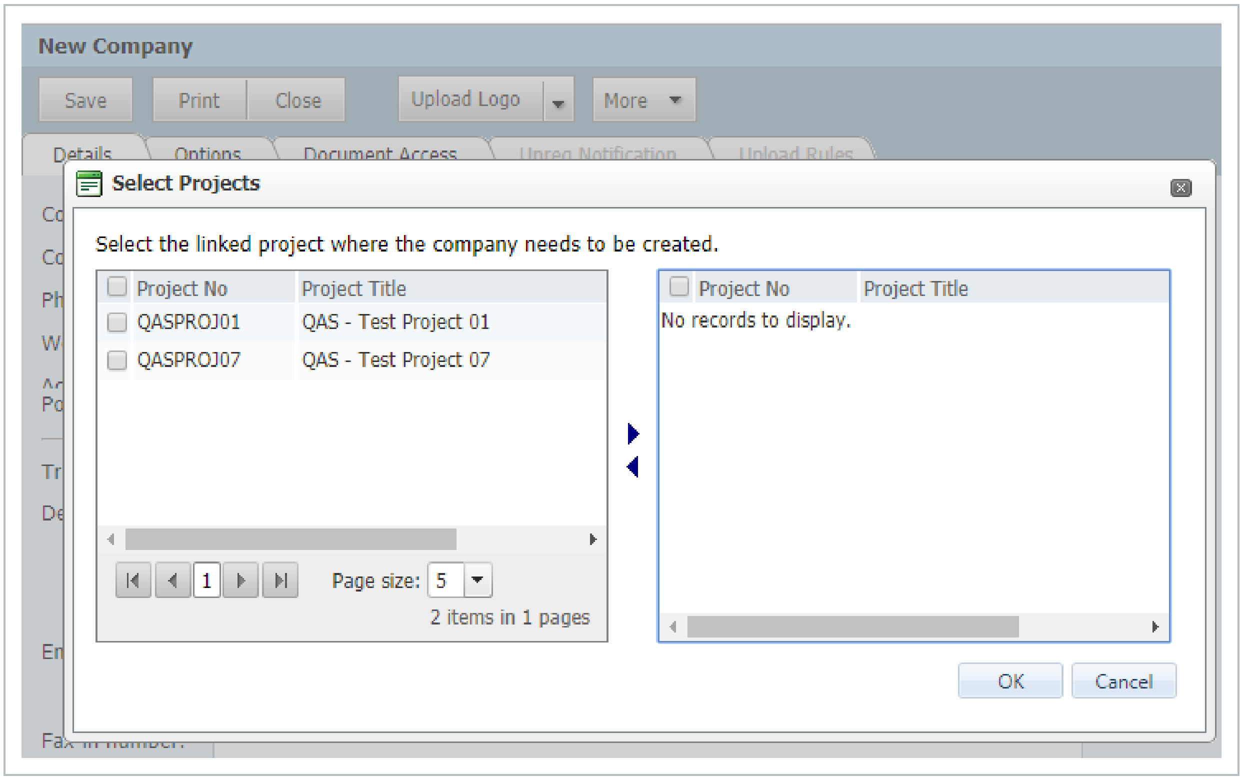


NOTE

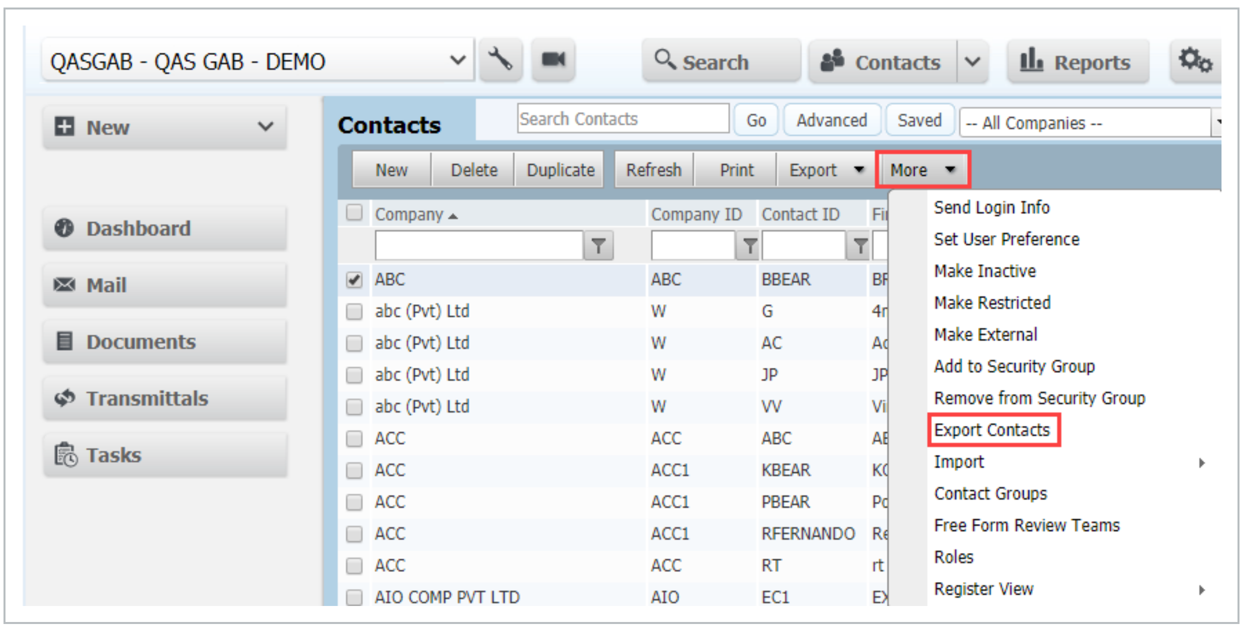
- Access to the Global Address Book project is restricted to project administrators and users from their company.
- All three elements of the Address Book (company types, companies and contacts) are integrated with the Global Address book.

4.3 POPULATING THE GLOBAL ADDRESS BOOK

1. New Company Types, Companies and Contacts can be imported or manually entered in the Global Address Book.
    - If manually entered, the user is prompted to post the new contact information into selected or all linked projects.



- If imported, the information can be posted to selected, or all linked projects via an Export contacts option.



2. A link is then maintained between the details of the contact in the Global Address book and the details in the linked projects.
3. If information is changed in the Global Address Book the linked project, the contact is auto

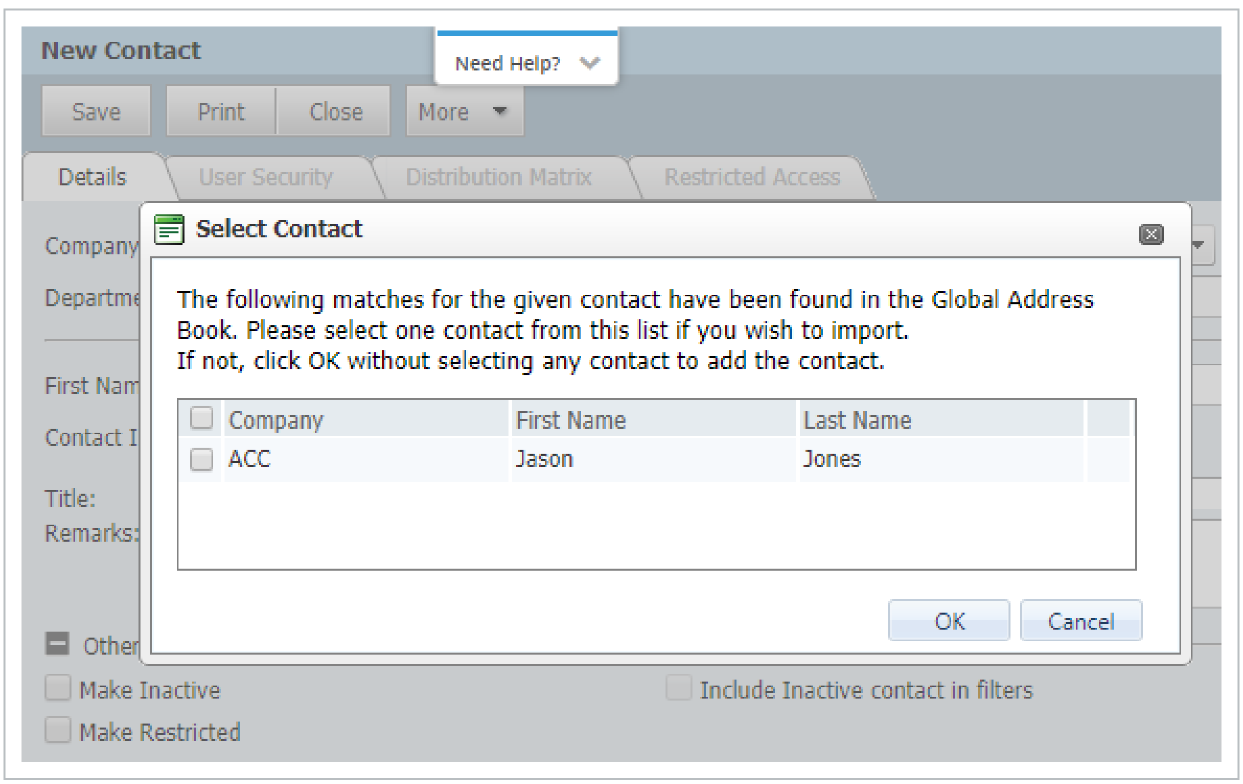
updated.

NOTE

- Users with access to the Global Address book can add contact details to the Global Address book but cannot post these directly to linked projects. The posting is a function of the Project Administrator using Export contacts option.
- Contacts can be imported into a Global Address book from projects that are using a project specific address book. In this case however there is no link maintained between the Global Address book and the source project.

4.4 CREATING CONTACTS IN A LINKED PROJECT

1. New contacts added in a linked project, are automatically added to the Global Address Book (assuming they don't already exist there) and a link is established.
2. The posting of new contacts to other linked projects must be done from the Global Address Book.
3. If new contacts are added in a linked project and they exist in the Global Address book the user is prompted to use the details from the Global Address book. If this option is accepted a link is established. If this option is not accepted and details continue to be manually entered the contact will not be linked to the Global Address Book.



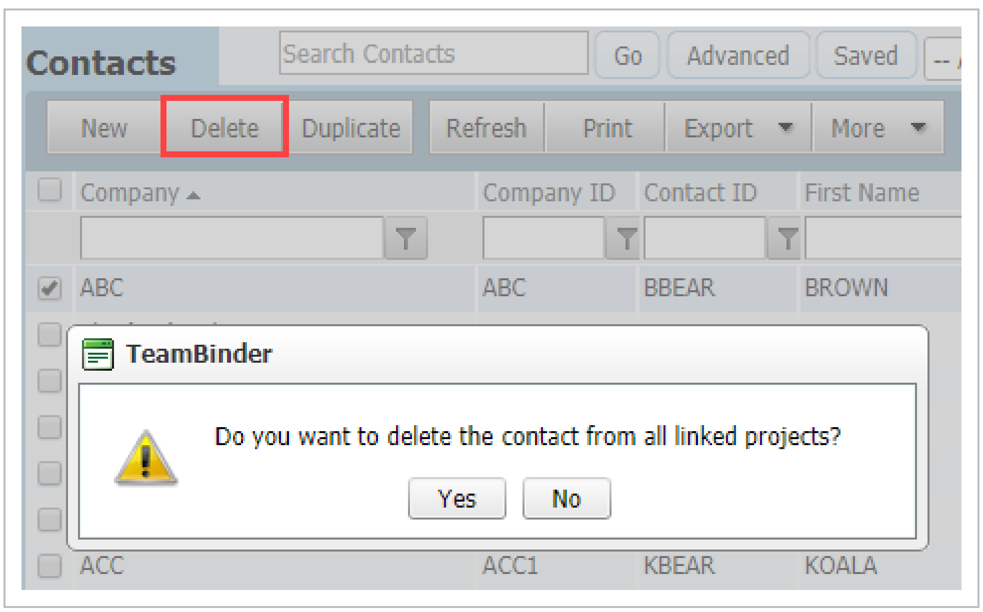
4. If linked contacts are updated in a linked project address book, the details are automatically updated in the Global address book and in other linked projects where the same contact is linked back to the Global Address Book.
5. When importing contacts from the Global Address Book project into the current project, any imported contacts are auto linked back to the Global Address Book.

4.5 MAINTAINING THE GLOBAL ADDRESS BOOK

If the Global Address Book is updated with changes to contact details, linked projects are automatically updated (for those contacts within the linked projects that are linked to the Global Address Book).

If contact details in a linked project are updated the Global Address book and other linked project will also automatically update.

Deleting Contacts: If a contact is deleted from the Global Address Book, the administrator will be prompted to delete the contact from all linked projects. If they choose yes, the contact will be deleted from projects with no transactions. If there are transactions within a project the contact is not deleted however the link to the Global Address Book is broken.



If a contact is deleted from a local project linked to a Global Address Book project, the Global Address Book is not affected.

Making contacts Inactive: This is treated in a similar way to Deleting contacts.

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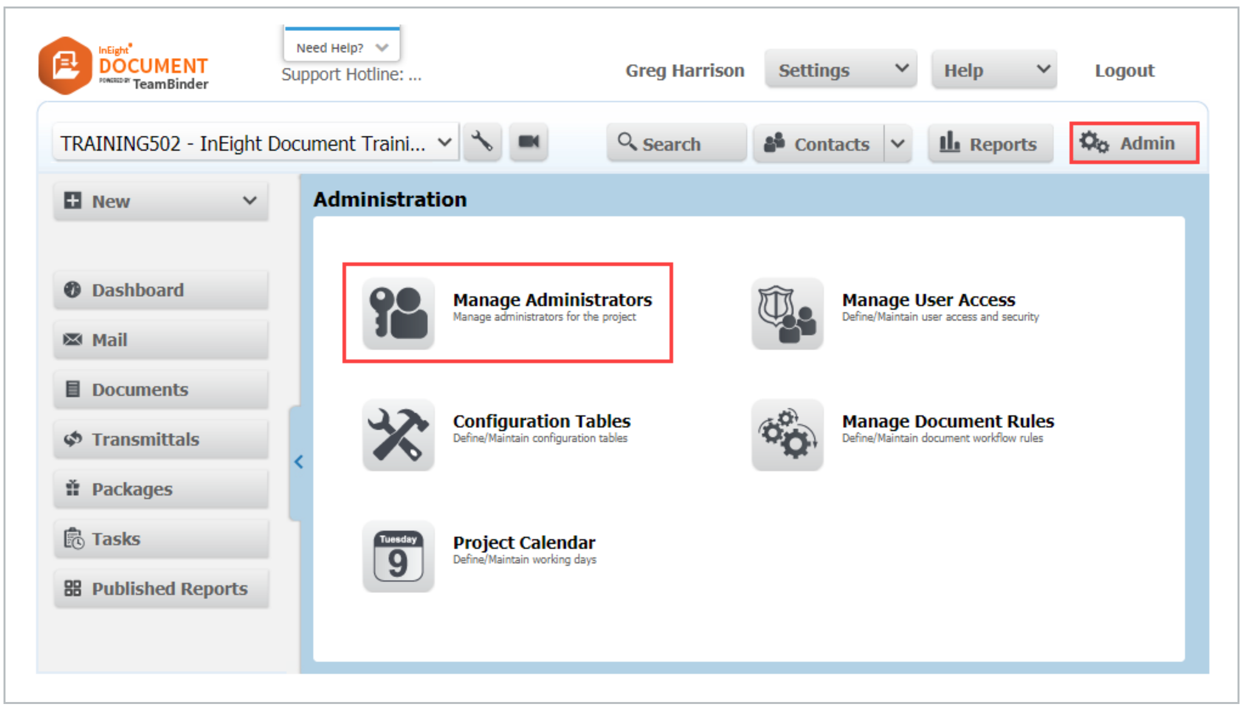
CHAPTER 5 – MANAGING PROJECT ADMINISTRATORS

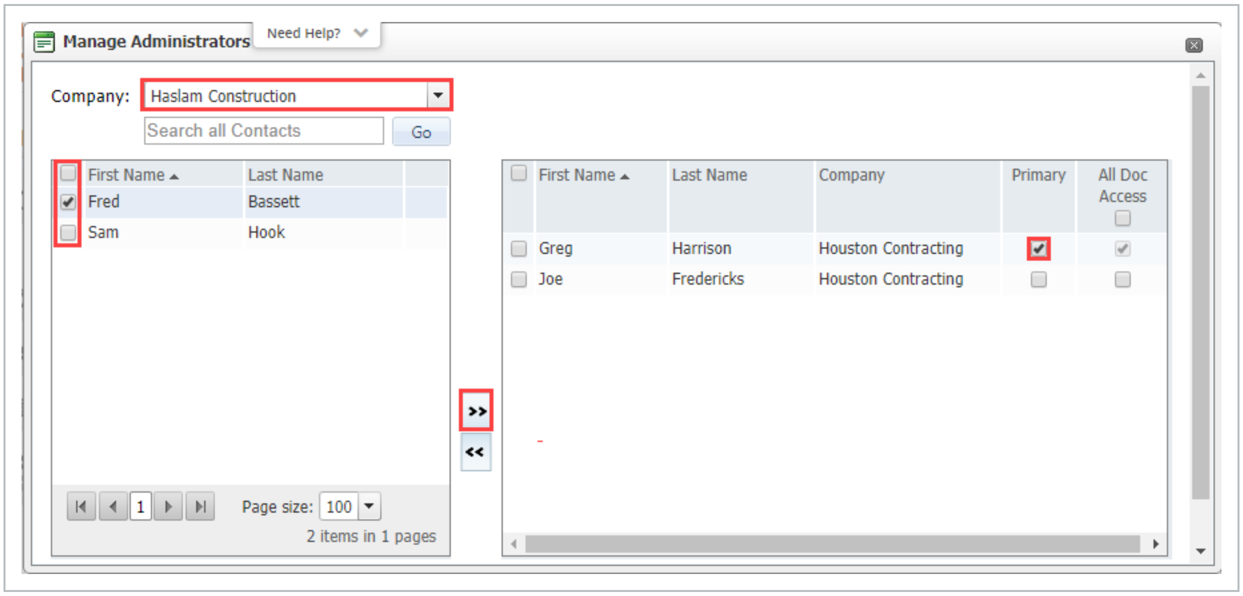
The Project Administrator is assigned during the Project creation but can be changed to any InEight Document user within a project by the existing Project Administrator.

5.1 UPDATING THE PROJECT ADMINISTRATOR

1. Go to **Admin** then **Manage Administrators**.



2. Filter the Company and select the contact, move them across in **Manage Administrators**.



3. Tick **Primary** check box against the contact and a prompt to confirm the change of Primary administrator will show. Click **Yes** to proceed.
4. Click **OK** when done.

NOTE

- The Role of Project Administrator can be assigned to more than one user within the same company by adding them to the list of administrators without ticking the Primary check box.
- For additional Project Administrators, it is possible to control access to all documents using the **Doc Access** check box. By default, they do not get access.
- The Project Administrator normally has access to all project documents in the document module. InEight can change the primary administrators access to be the same as all other users. In this case the option to define automatic distribution rules is also disabled. Contact InEight for more information on this.

5.2 ASSIGN COMPANY ADMINISTRATORS

A Company Administrator can be assigned within each participating company to allow them to manage some administrative functions.

Company Administrators can perform the following tasks for users within their own company:

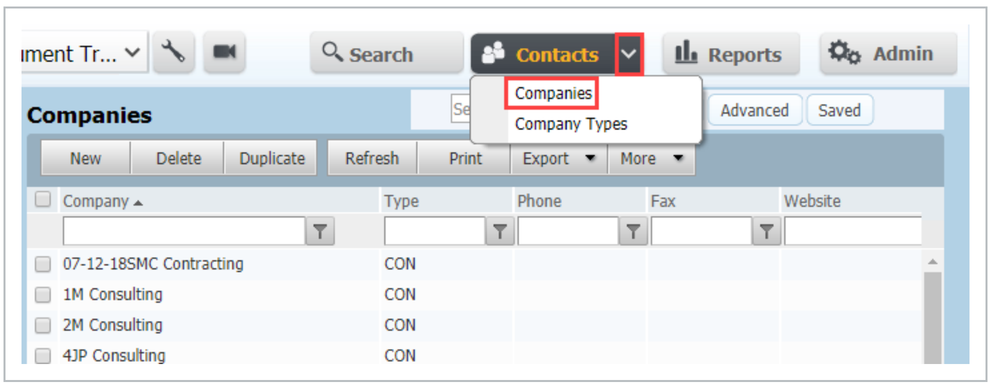
1. Create new users.
2. Edit contacts details within a project address book.

3. Enable/Disable users.
4. Change user passwords.
5. Create Security Groups.
6. Modifying Security Group definitions for groups they have defined.
7. Configure Distribution Rules.
8. Approve/Reject document subscriptions.
9. Grant access to documents via the grant access wizard.

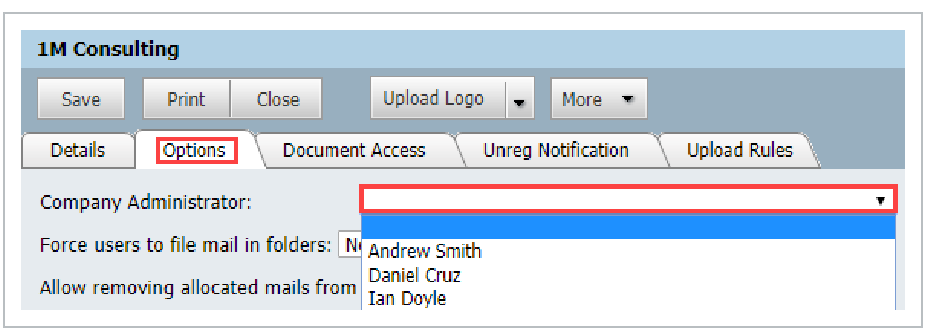
A Company Administrator is limited to the access and security levels the Company Administrator themselves have been assigned. For example, if the Company Administrator has access to only Architectural Documents and no access to Transmittals, then users within that company cannot be assigned access to documents of another discipline or be given access to generate transmittals.

To assign Company Administrators:

1. Click the drop down next to **Contacts**, select **Companies**.



2. Filter for the Company and open the Company Details window.
3. Go to **Options** tab in the Company Administrator drop down select the required user.



4. Click the **Close** button and **Yes** when prompted to save.

NOTE

- The company administrator will need to be notified by email outside of InEight Document of this change in status.
- The ability for a company to create both new companies and contacts can be enabled at a project level by InEight. Once the feature is enabled at a project level, the project administrator can assign the function to company administrators via the Companies window.
- Enabling this function not only gives them the ability to create companies and contract but also edit the details of any existing company and or contact.
- A feature can be enabled to mandatory assign an ABN (Business) number to all new companies. When creating a new company, type the ABN first to auto complete if the company already exists.

CHAPTER 6 – CONFIGURATION TABLES

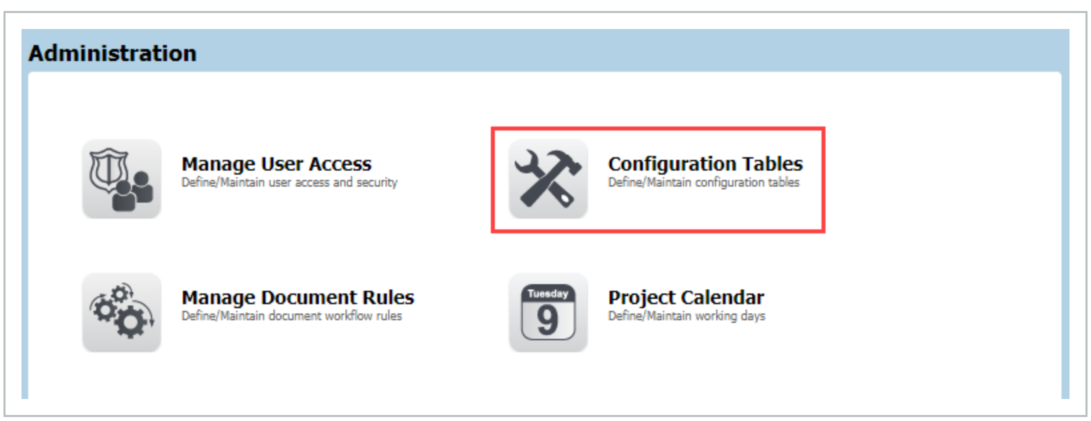
6.1 ACCESSING CONFIGURATION TABLES

Throughout InEight Document there are attributes that can be assigned to mail, documents, transmittals, packages, etc from drop down lists.

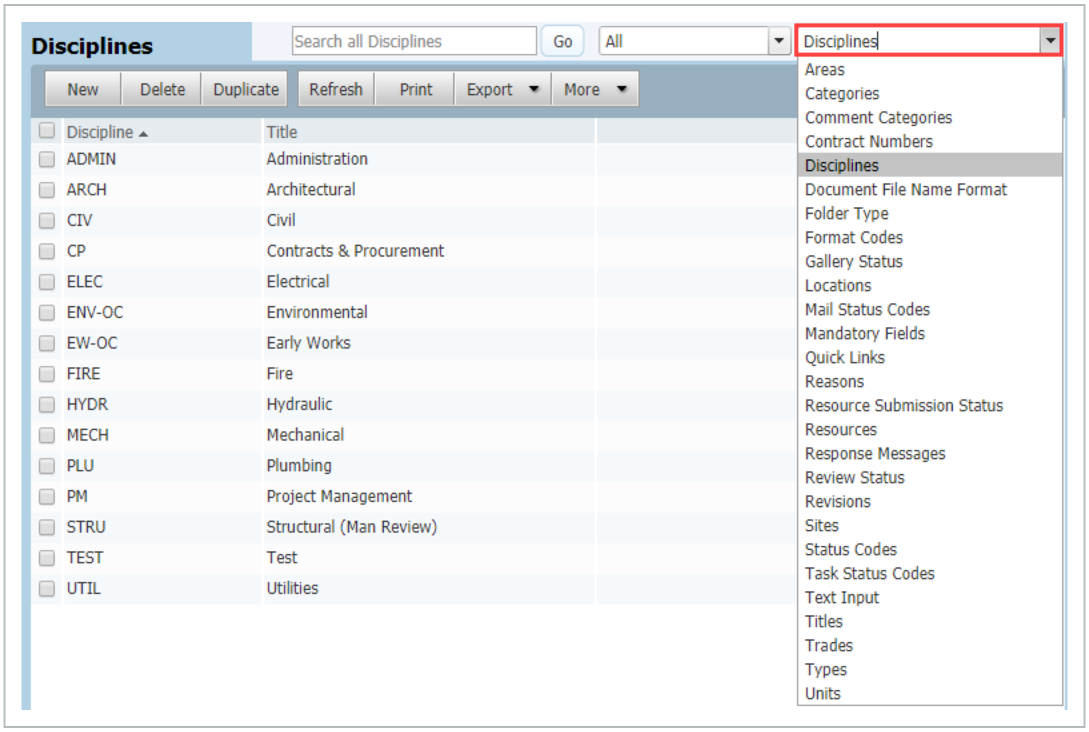
The values in the drop down lists are defined on a per project basis via the InEight Document configuration tables.

To access the configuration tables:

1. Click **Admin**, then **Configuration Tables**.



2. Use the drop-down list in the top right-hand corner of the screen to select a configuration table.



3. From the toolbar create, delete records or edit existing records.

Field	Description
Documents	
Areas	Additional classification eg sections of a plant or stages of a road project
Categories	Can be used to further classify a drawing type in the system and are part of the upload rule
Disciplines	Disciplines are mandatory, they are part of the upload rule, distribution of documents; trigger a workflow and determining Review Teams.
Locations	Typically, the physical delimiters on a project
Status Codes	A mandatory field used to reflect where the document is in its life cycle. The Status can also be used as an element in the upload rule.
Types	An additional classification for documents and are part of the upload rule
Mail	

Field	Description
Areas	This Field can also be used in Mail to be used in Search Filters
Disciplines	This Field can also be used in Mail to be used in Search Filters
Locations	This Field can also be used in Mail to be used in Search Filters
Mail Status Codes	This status can assist when managing large volumes, the status is applied when creating or responding to mail.
Address Book	
Contact Title	Used when adding names to the address book eg Mr.
Trade	Used to categorize companies, companies can be allocated to more than one trade

NOTE

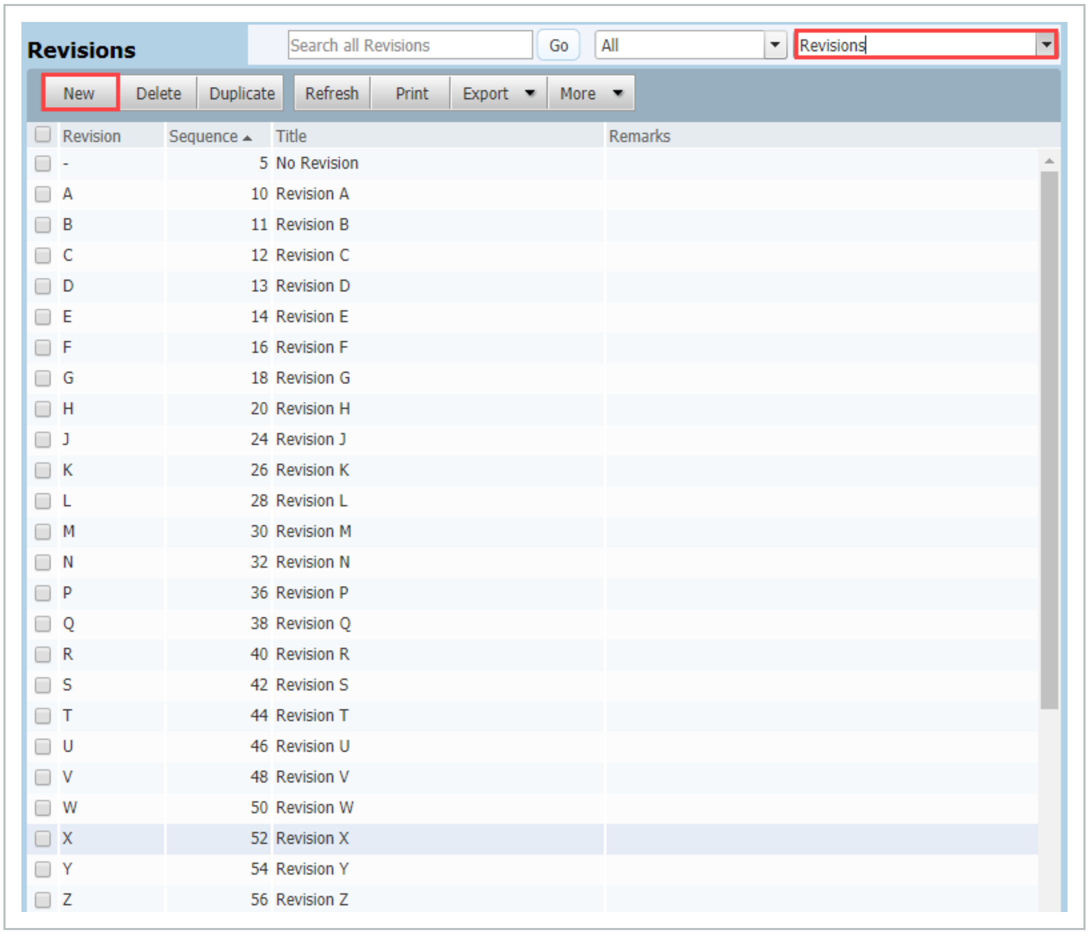
- Use the module drop down list (default value is All) to select the configuration tables related to a single module only (e.g. Documents).
- It is possible to make **Inactive** any configuration table values that are no longer required to be in use using the Make Inactive tick box.
- Configuration table values can be exported to Excel using the **Export** button.

6.2 REVISIONS

Revisions are a mandatory attribute of controlled documents in InEight Document. There is a strict rule in InEight Document that each time a document is uploaded, the revision number must be greater than the previous revision. This is controlled via a sequence number against each revision.

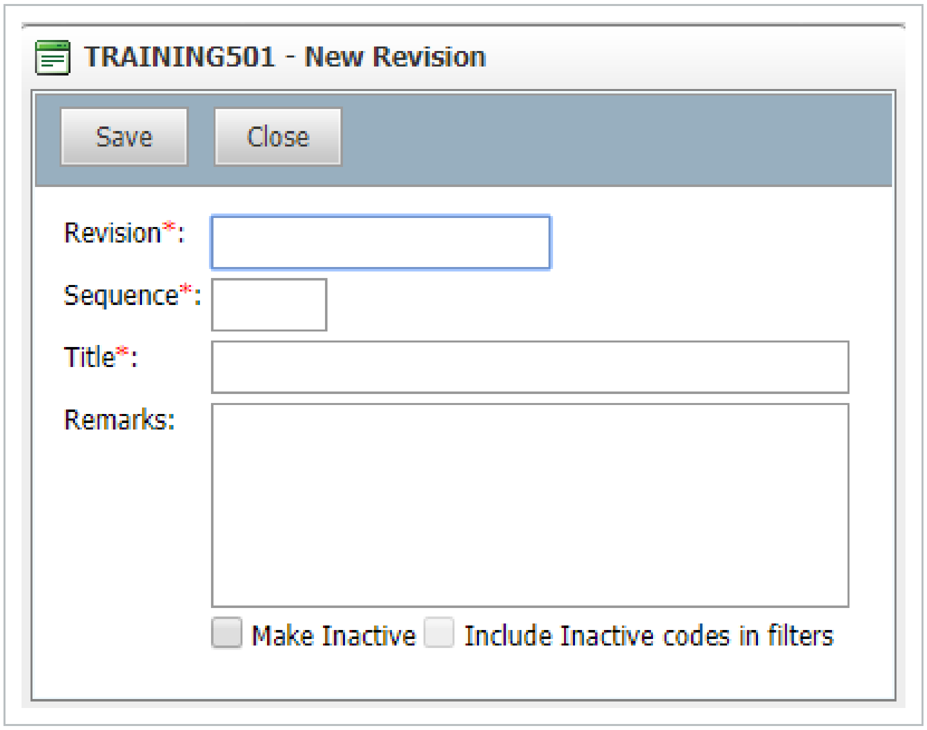
The Sequence is used to validate documents being uploaded to ensure that the revision being uploaded is greater than the previously uploaded revision.

1. From the **Configuration tables** select **Revisions**.



2. Click **New**.

3. Revision are populate with the following fields:



- **Revision** – value of the Revision (A, B, C etc.).
- **Revision Title** – description of Revision (optional).
- **Sequence** – controls the hierarchy of Revision values.

4. Add any remarks (optional).
5. Click **Save**.

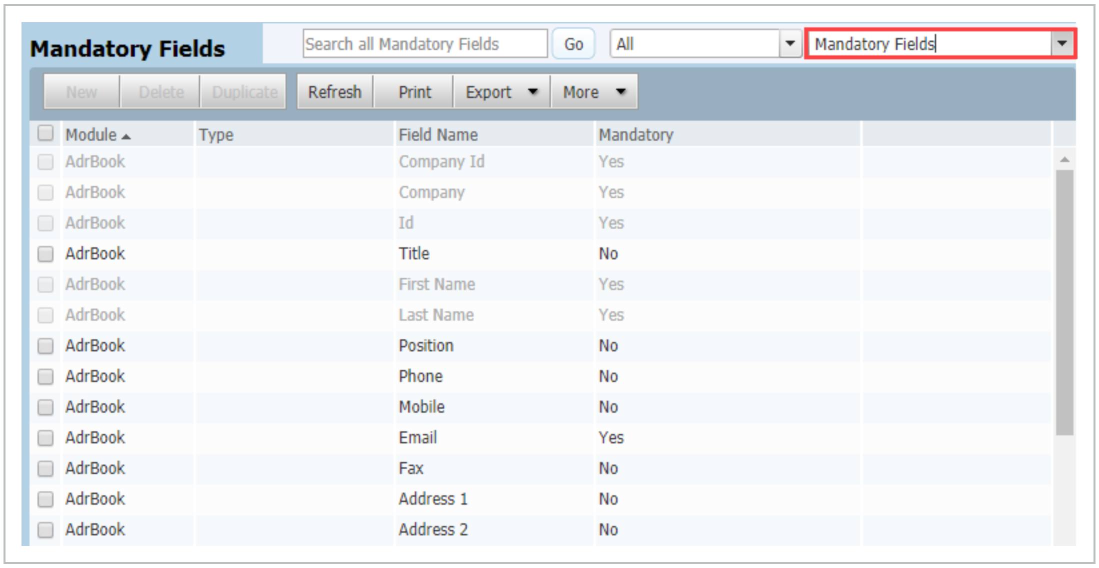
NOTE

- It is possible to upload additional view files to a document without changing the revision.
- When populating the sequence field, leave plenty of gaps in the sequences used so additional entries can be added in the sequence.

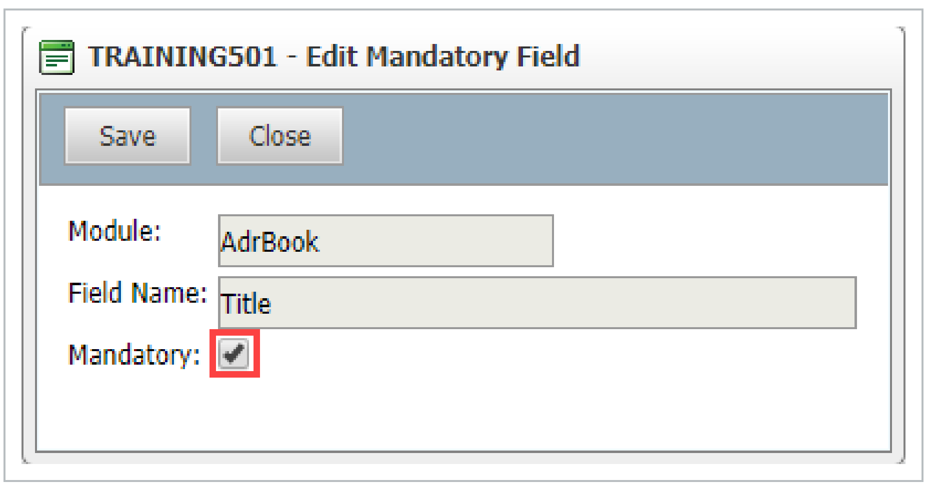
6.3 DEFINING MANDATORY FIELDS

Mail, Documents, Transmittals and the Address Book have a number of pre-defined mandatory fields. Additional fields can be made mandatory at these screens if required.

1. From the **Configuration tables** select **Mandatory Fields**.



2. Double click to open any of the available fields listed.
3. At the **Edit Mandatory Field** window, tick the **Mandatory** box.



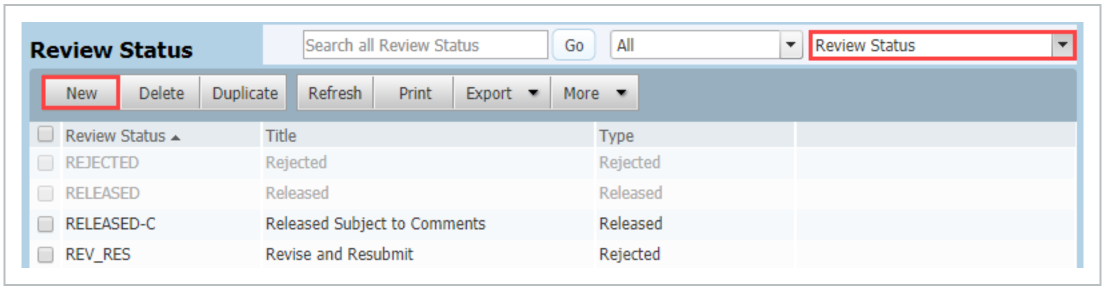
4. Click **Save**.

NOTE	Mandatory fields that cannot be changed are greyed out.

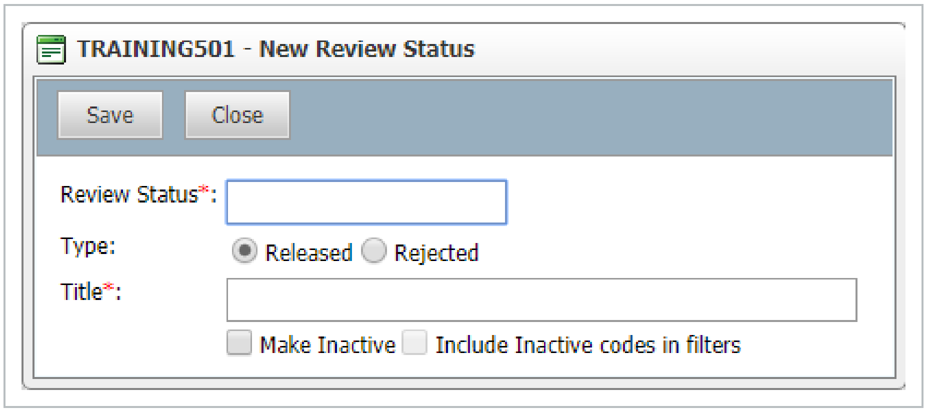
6.4 REVIEW STATUS CODES

At the end of review a Status is assigned, this status determines if the document is released or rejected.

1. From the **Configuration Tables** select **Review Status**.



2. Click **New** and add the following:



- **Review Status Code –**the code for the Review Status.
- **Type** – select either Released or Rejected. This will determine if a document is released or rejected when this review status is applied to a document.
- **Title** –description of the Review Status code.

3. Click **Save**.

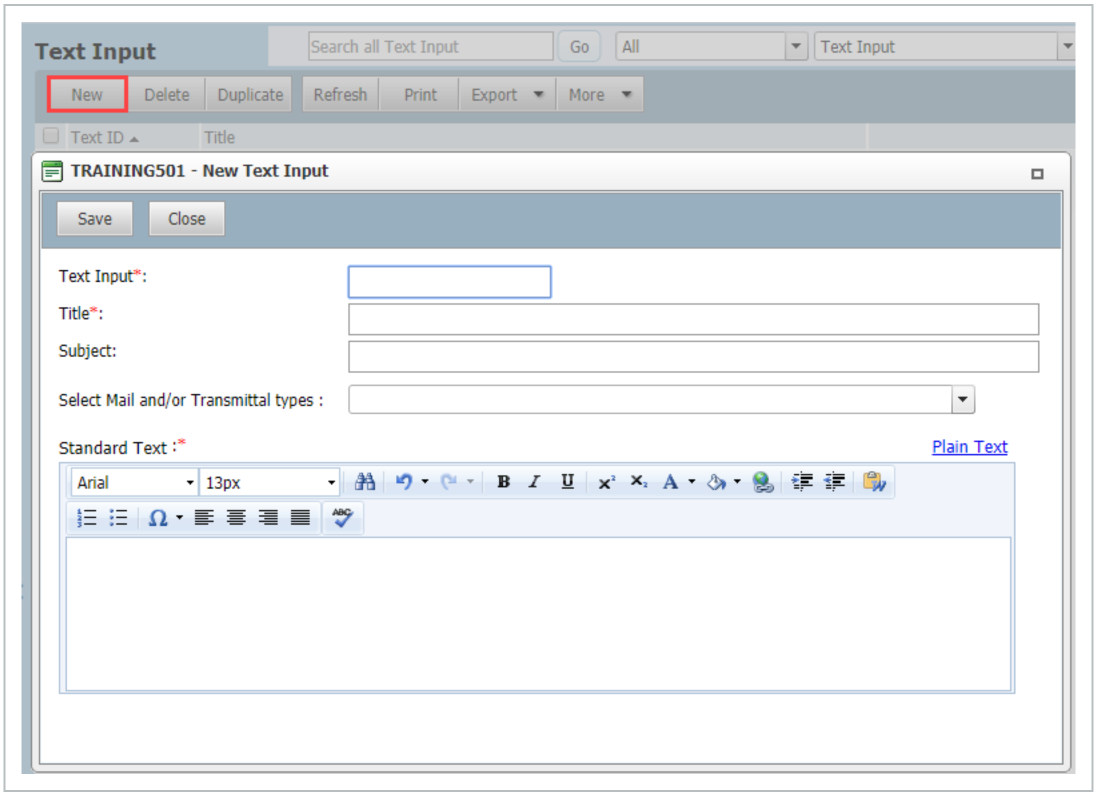
6.5 TEXT INPUTS

Text Inputs are commonly used strings of text that can be made available to users when creating mail or transmittals.

Text Inputs can be assigned to selected Mail and Transmittal Types and linked to a default Subject.

To create a text input:

1. From the **Configuration Tables** select **Text Input**.
2. Click **New** and enter a **Text Input** code and **Title**.



3. Enter a **Subject** (if applicable) that will be entered in the Subject when the text input is selected by the user.
4. In the **Select Mail and/or Transmittal types** select any Mail or Transmittal types that this text input will be available in.
5. Enter the text in the **Standard Text** area. Text can be pasted into here from other sources.
6. Click **Save**.

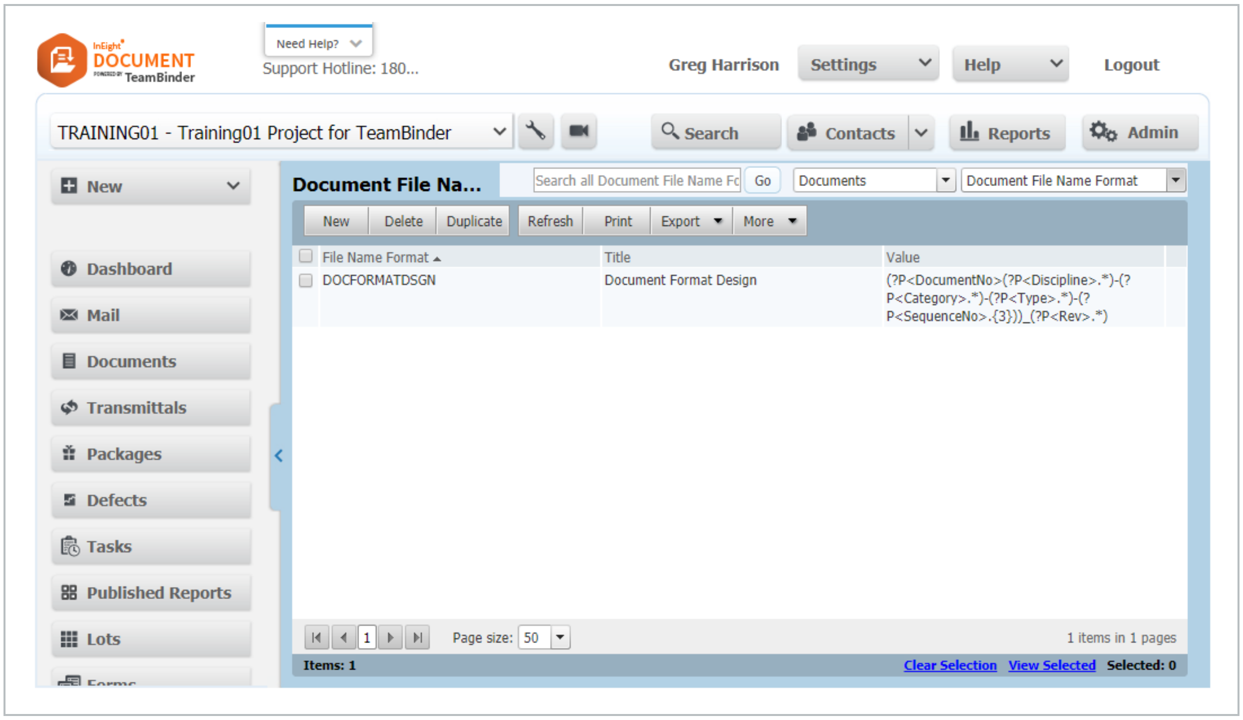
6.6 DOCUMENT ATTRIBUTE EXTRACTION

In addition to Auto Document Number there is the ability to extract Document Metadata information from the saved file name. This will be active for both single and bulk document uploads.

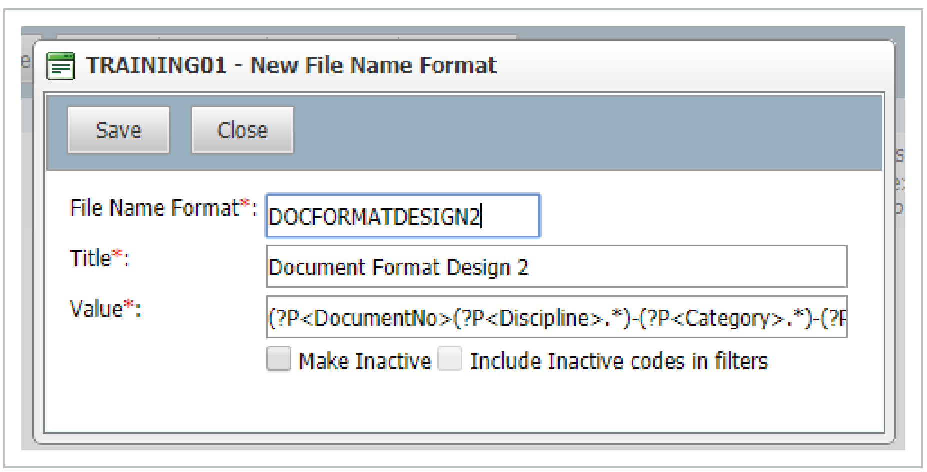
The option to ‘Extract Document metadata from file name’ needs to be activated via Project Settings - Documents.

To define the Document File Name Format:

1. From the **Configuration tables** select **Document File Name Format**



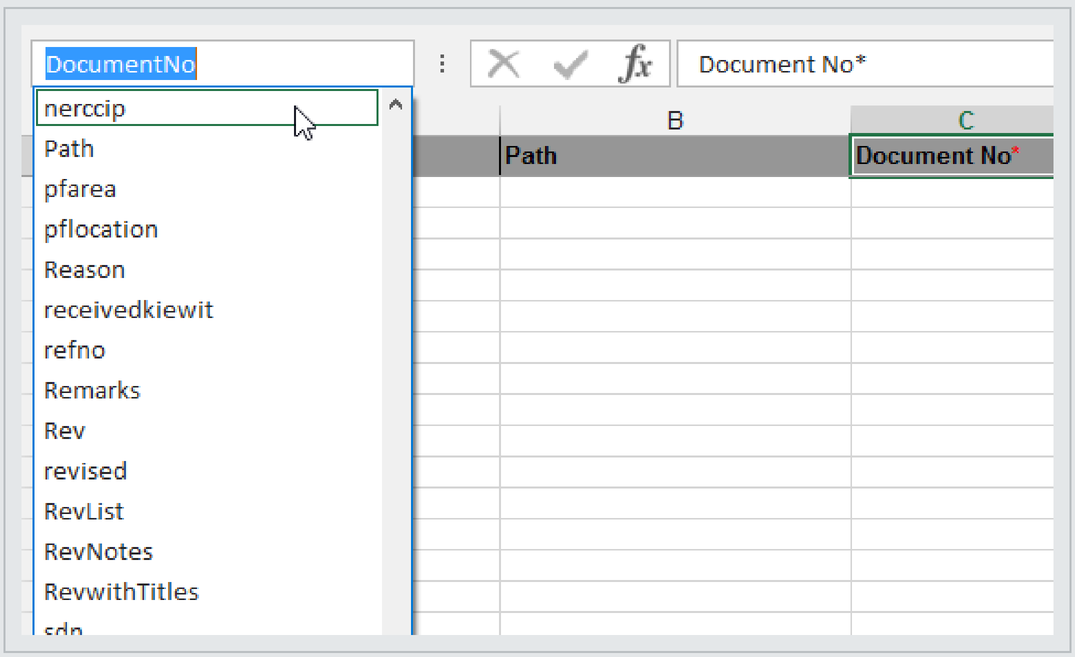
2. Click **New** and add a **File Name Format** and **Title**.



3. The **Value** field must be populated with the required expression to extract the metadata, and then click **Save**.
4. When a file is added to a single upload or bulk upload and meets that about file format the metadata will be extracted.

NOTE

- Fields are extracted using RegEx – please see examples at https://www.regextester.com
- Field names need to be inserted with the format (?P<fieldname>.*)
- No spaces if field name is two separate words.
- To include other attributes as part of document number use the format (?P<documentno>(?P<fieldname>.*)-(?P<fieldname>.*))
  - The two fields included before the)) would make up the document number.
  - Documentno does not have the closed parenthesis at the end to indicate the inclusion of the fields following.
  - Note that the "-" between parentheses is the separator between attributes.
- To find names of custom fields use XL-upload as below:
  - Highlight any field name header.
  - Select drop down in top left.
  - Locate field name for utilizing in document number convention.

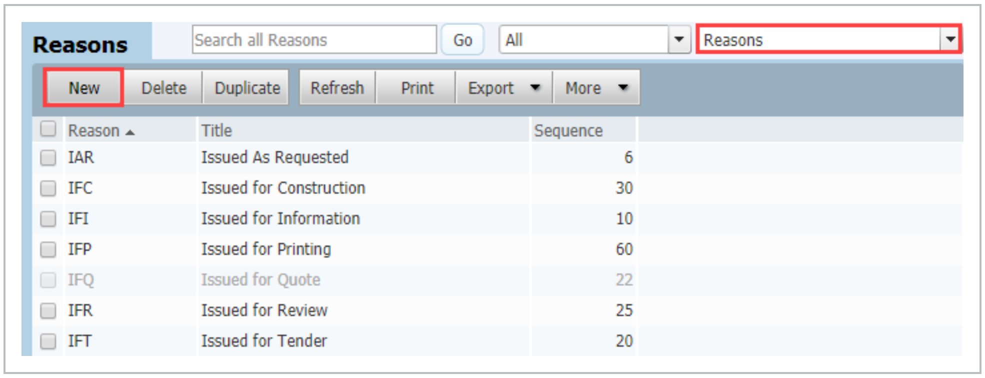


- If any metadata is already populated, it will not be overwritten when the file is attached.

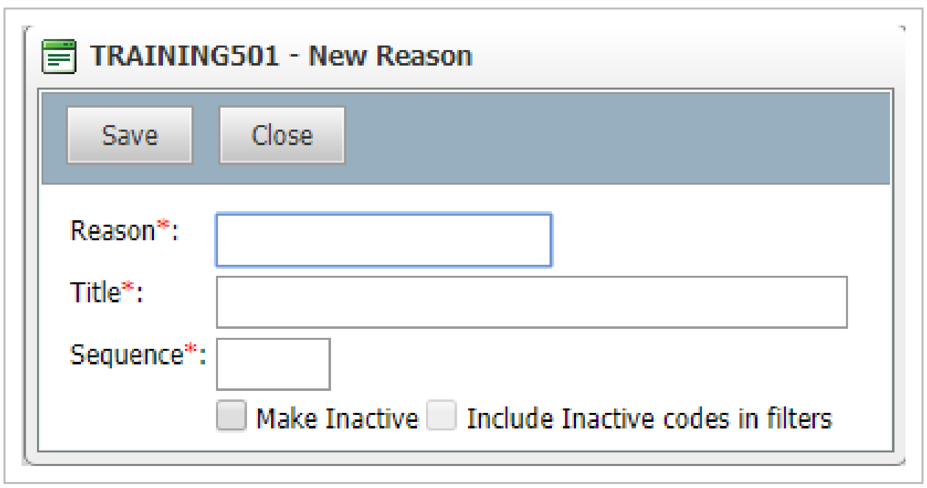
6.7 REASONS

When creating a transmittal a reason for the issue can be specified.

1. From the **Configuration Tables** select **Reasons**.



2. Click the **New** button.
3. Add a **Reason** code and **Title.**

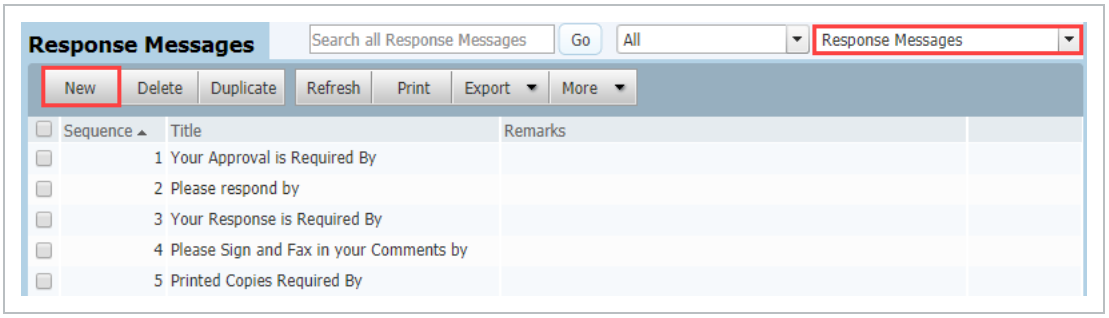


4. Enter a **Sequence** number to indicate the order it will appear in the drop down box.
5. Click **Save**.

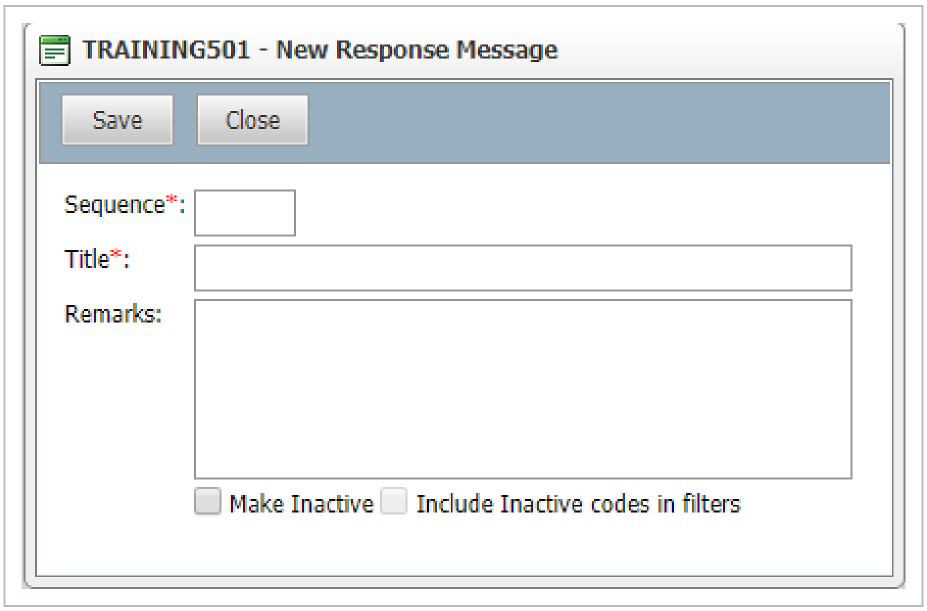
6.8 RESPONDS MESSAGES

When requesting a response to a transmittal standard messages can be specified.

1. From the **Configuration Tables** select **Response Messages**.



2. Click the **New** button.



3. Enter a **Sequence** to indicate the order it will appear and **Title**.
4. Click **Save**.

6.9 FILE FORMATS

InEight Document supports the storage and distribution of multiple formats for the same controlled document at the same revision and status.

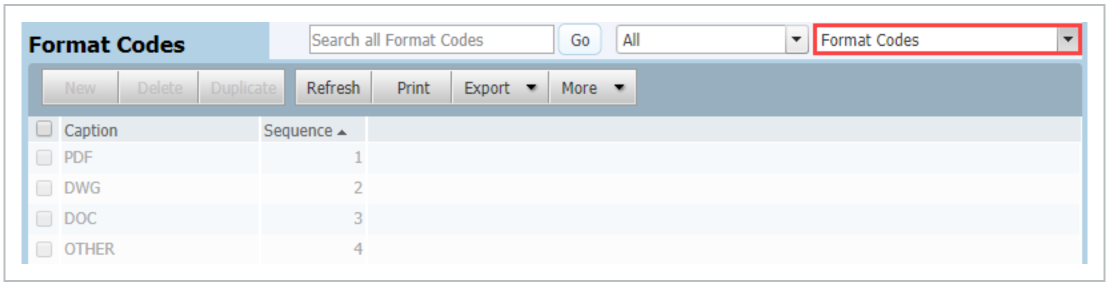
When viewing the document register, 4 file format columns are displayed (the default settings are PDF, MSO, DWG and OTHER). Each file format column has one or more file types (defined by document file extension) associated with it.

As documents are uploaded to InEight Document, the system auto detects the file type extensions of the included view files and in the master document register, shows an icon in the appropriate file format column to show of the existence of this file format.

This can only be edited at the start of a new project and before any documents are uploaded to the system.

To modify the primary file format settings:

1. From the **Configuration tables** select **Format Codes**.



2. The default 4 options (and 4 is the maximum) are listed.
3. Click on any of the current formats and edit the details as required:
   - Modify the Caption and Sequence (controls the column position from left to right) as required.
   - Use the Add/Remove buttons to associate the required file formats with the caption.
4. Click **Save**.

NOTE

- If a document is uploaded and it does not have a file format as defined in the format codes, it will be applied to the fixed file format of OTHER.
- The Format Code of OTHER cannot be removed.

6.10 QUICK LINKS

The Quick Links widget on the Dashboard displays a list of links to external sites and is visible to all users if there is at least one link defined.

To add Quick Links:

1. From the **Configuration tables** select **Quick Links**.
2. Click **New**, enter the **URL**.
3. Add any **Link Text**.

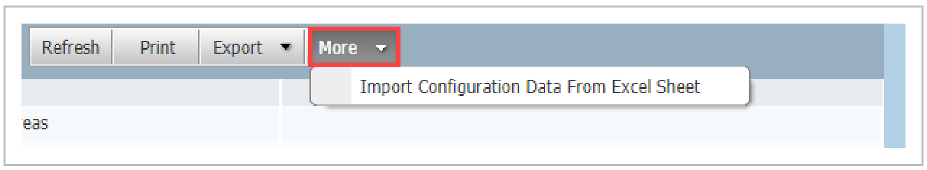
4. The **Section text** is not mandatory but used to group links under sub headings.
5. Click **Save.**

6.11 IMPORT CONFIGURATION TABLES FROM MS EXCEL

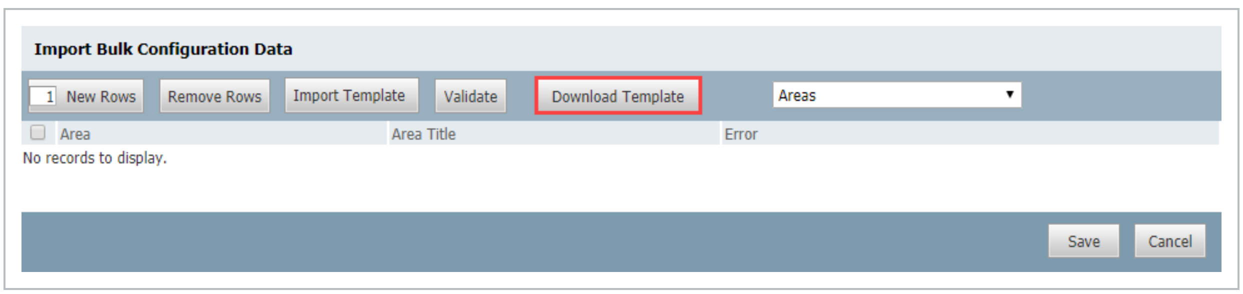
Data can be imported into InEight Document Configuration tables from Excel.

To Import Configuration Tables from MS Excel:

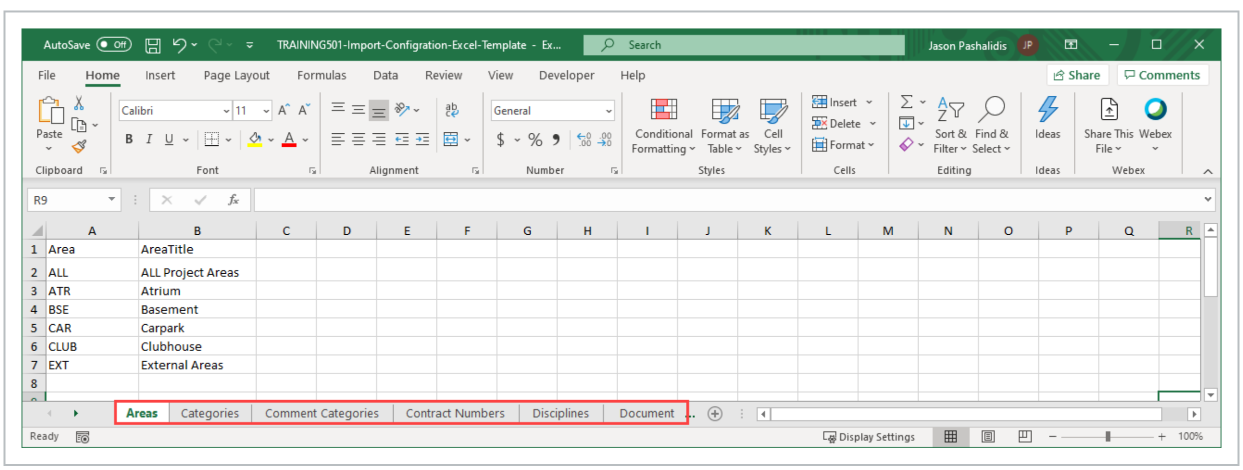
1. From **Admin**, select **Configuration Tables**.
2. From **More** select **Import Configuration Data From Excel Sheet**.



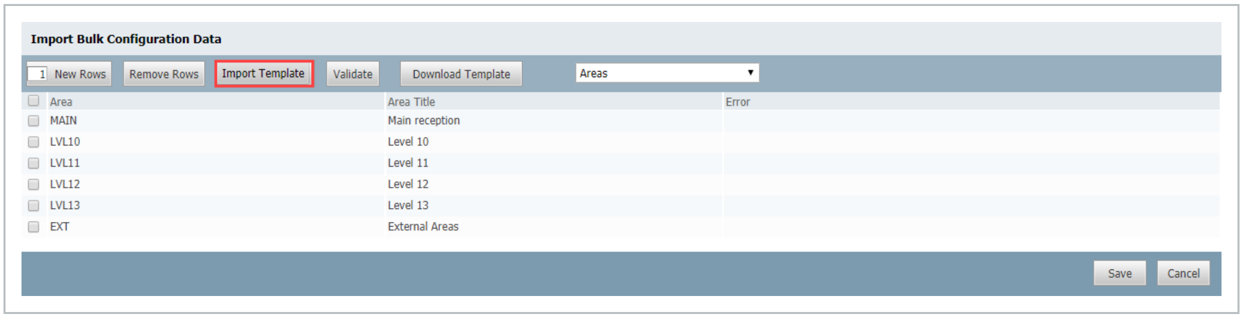
3. Click **Download Template** to download the Excel template.



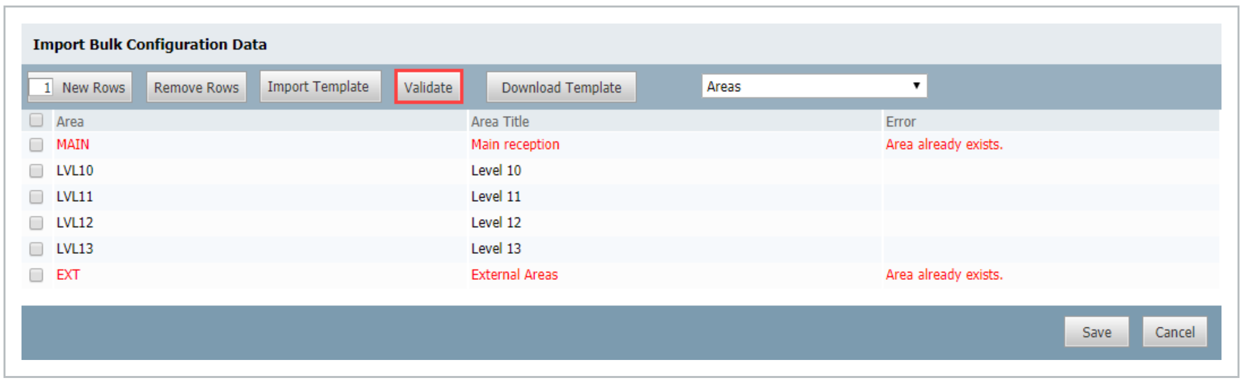
4. Populate and save the template with the data to import.



5. Click **Import Template**, select the Import file populated and **Open**.



6. The rows on the **Import Bulk Configuration Data** window will populate automatically based on the information in the import file.
7. Click **Validate** and fix any errors. Click **Save** when done.



8. A verification of upload message will be received.

NOTE

- The template will contain a separate sheet for each Configuration table.
- Each sheet that has data will be imported.

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CHAPTER 7 – ADDITIONAL ADMINISTRATIVE FUNCTIONS

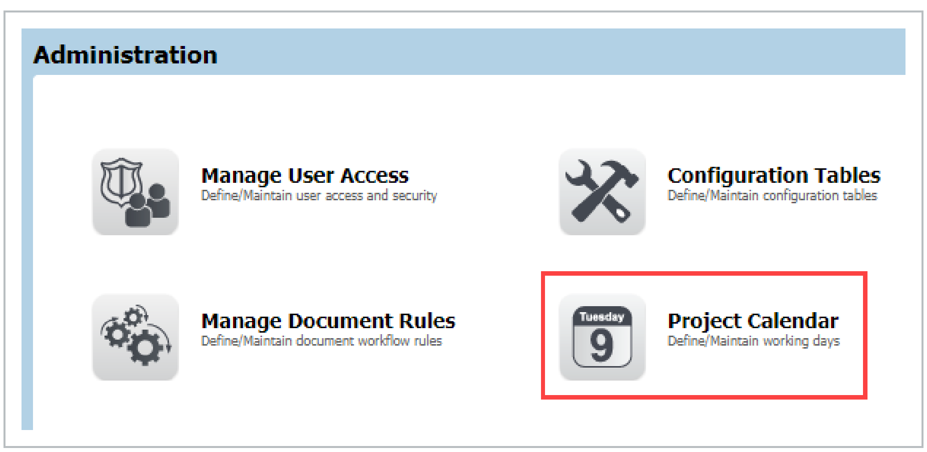
7.1 PROJECT CALENDAR

InEight Document has a built in Project Calendar used to derive default respond by dates in the Document, Transmittals and Workflow modules based on working days.

By default, the Project Calendar marks all Saturdays and Sundays as non-working days, however these can be changed as required.

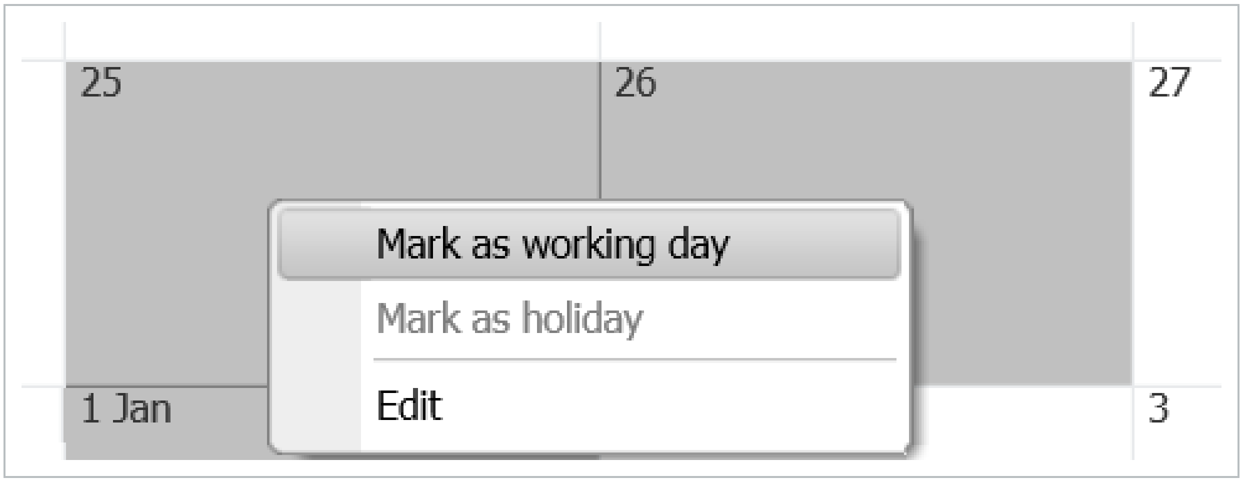
To modify the calendar settings:

1. Click **Admin** then select **Project Calendar**.



2. Navigate to the month and year from the drop down lists.

3. To mark a day as working on non-working, right click and select either **Mark as working day** or **Mark as Holiday**.



NOTE

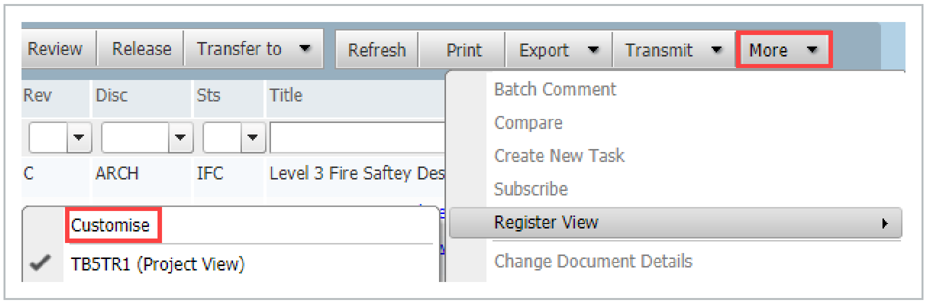
- The respond by dates which are calculated based on working days as defined by the Project Calendar are:
- **Mail Respond by dates** where a Default response period has been defined.
- **Transmittal Respond by dates** where a Default response period has been defined.
- Controlled Document Review Durations days allowed.

7.2 CUSTOMIZING REGISTER VIEWS

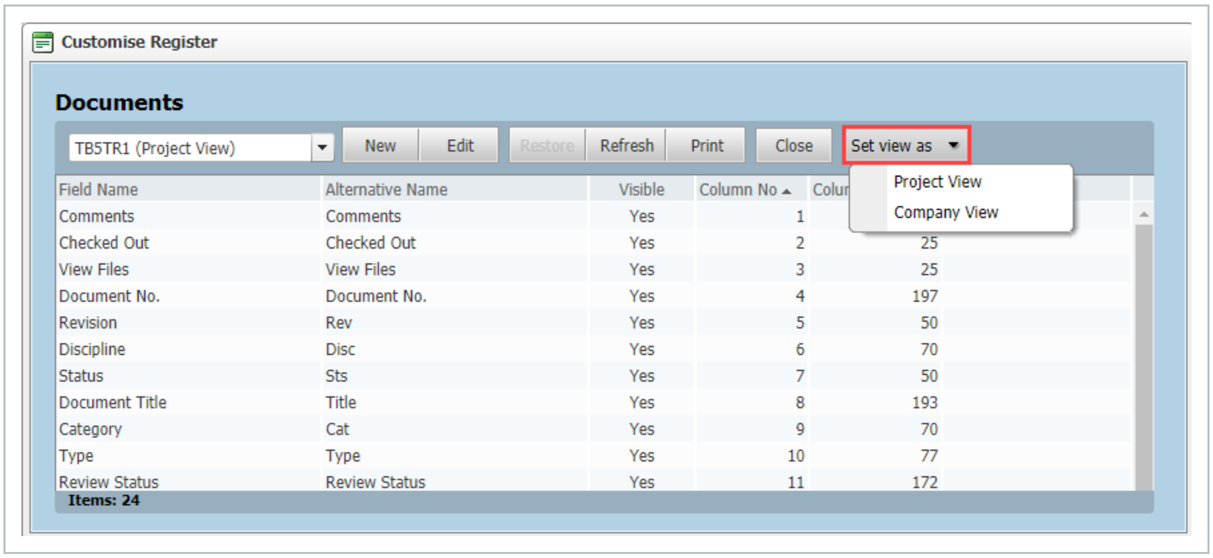
A custom register view for each module can be defined by default for all users within a project. Alternatively, each company can define their own default custom register viewers for each main register.

To define a Company level or Project Level custom views:

1. Define a user based custom view that you want to deploy as a company or project level view.
2. From the relevant register select **Register View** from **More** and **Customize**.



3. At the Customize Register window select the required personal custom view from the drop down list. From **Set View as** select either Project View or Company view.



4. Your company or project view will now be listed as custom views within the naming conventions:
   - <Project Number> (Project View) for Project views
   - <Company Name> - Company View for Company views

NOTE

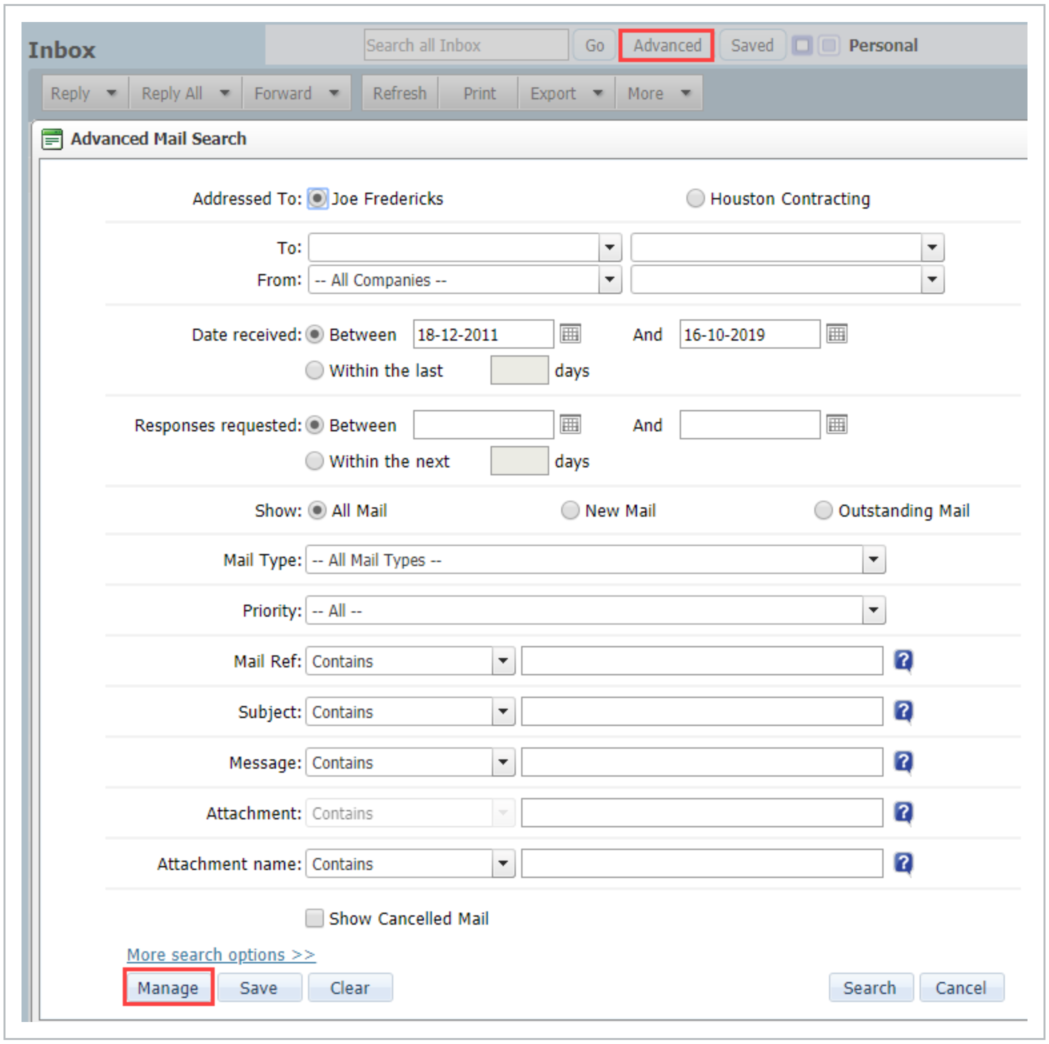
- When users access a register their preferred (default) custom view will be loaded. If they do not have their own custom view the company defined custom view will be loaded, otherwise a Project defined custom view will be loaded. If no custom registers are defined a system default view will be displayed.
- The ability to define Project and User level Custom register views is enabled by default and managed via the Project settings. If enabled at a Project level the option to allow a user custom register views can be managed at a company level from the Options tab within company details.

7.3 MANAGING SAVED SEARCHES

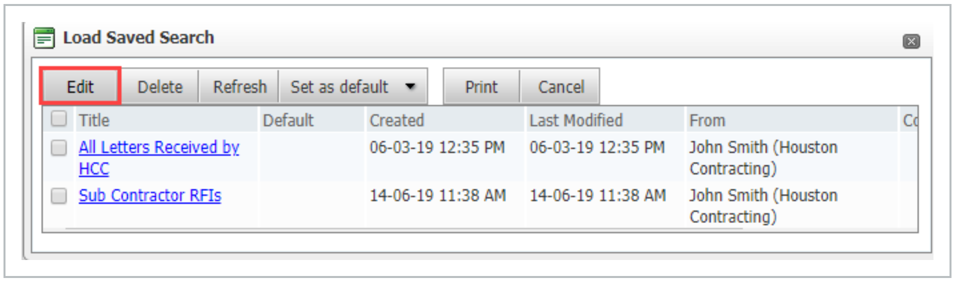
Saved searches can be made available to other users within the company or to the project and set as their default filter.

To make the search condition available:

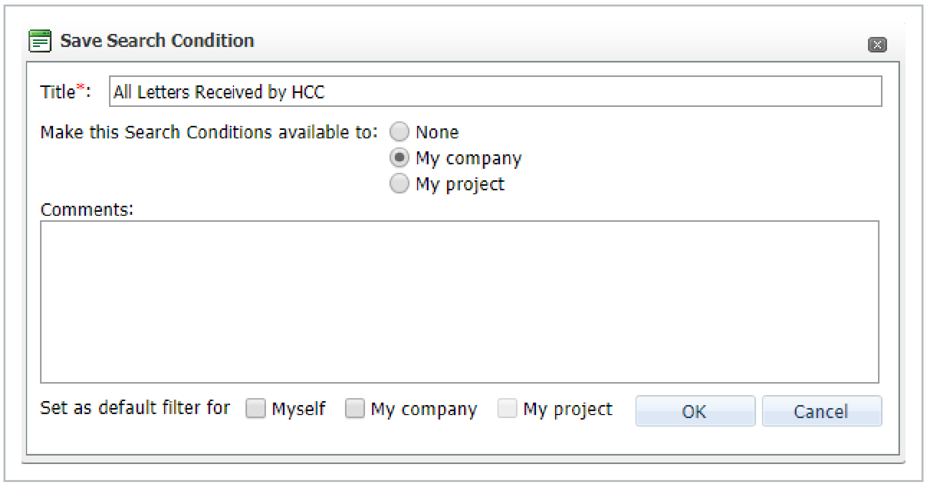
1. From **Advanced Search** in either Mail or Documents click **Manage**.



2. Select the saved search and **Edit**.



3. Change the **Title** if required.



4. Select the **Make the Search Conditions available to:** either My Company or My project as applicable.
5. Add any Comments if required
6. The default filter can be specified, this is dependant of the option selected for making the search condition available.
7. Click **OK**.

NOTE Search conditions can also be set as default filter from **Manage**, select saved search, **Set as default** then choose company or project.

7.4 FILING IN FOLDERS

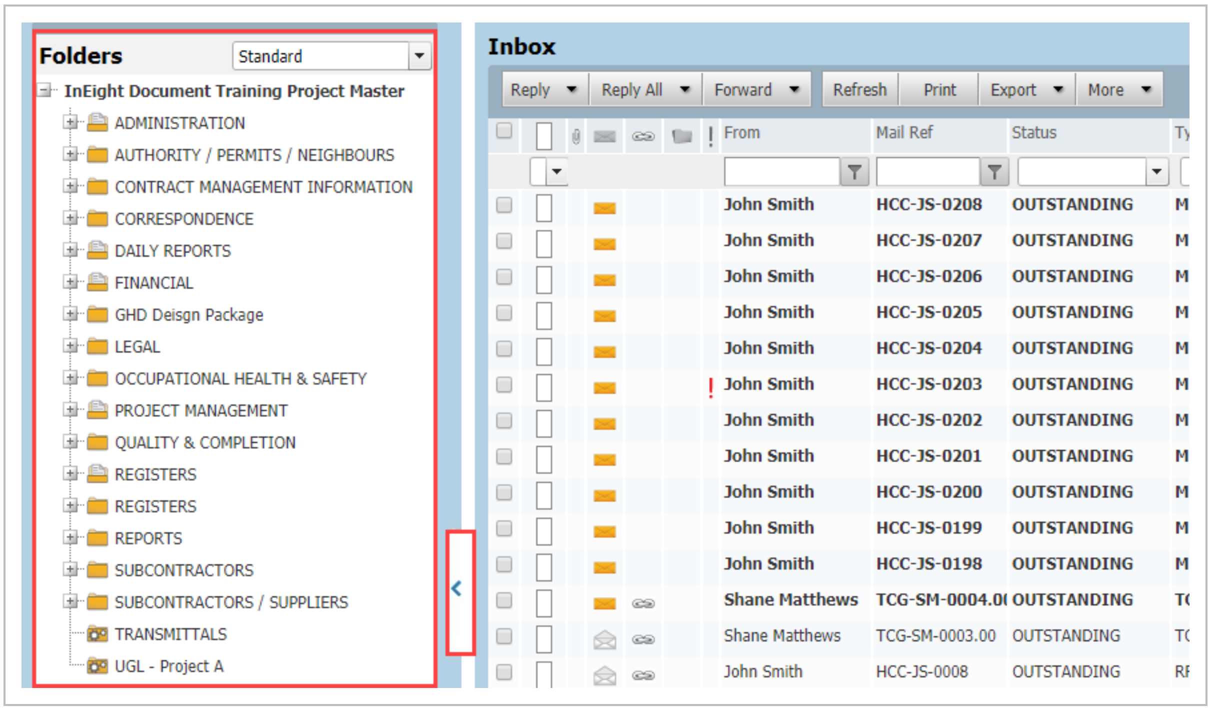
In addition to standard folders, InEight Document enables projects and/or companies within a project to define a multi-level filing system called Folders to further enhance the way items are indexed or “filed”.

Use of **Folders** in InEight Document enables a centralized filing system to be created for use by all parties on a project (**Public Folders**), or for use only by a single company on a project (**Private Folders**).

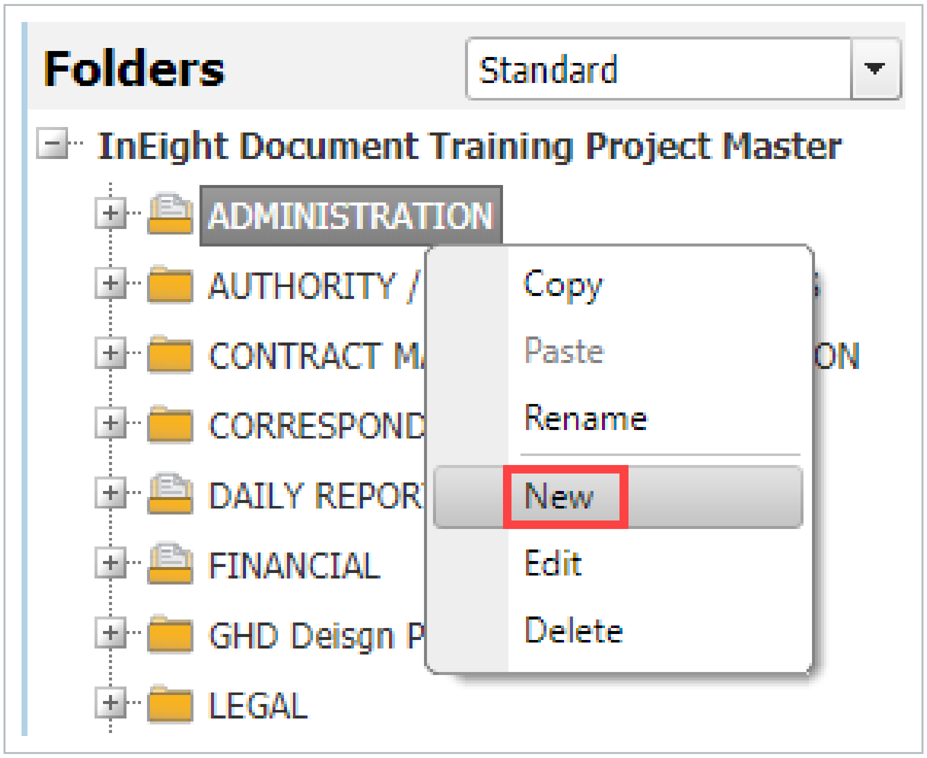
The use of **Folders** on a project does not in any way compromise a person's security level.

7.4.1 To create a Folder structure

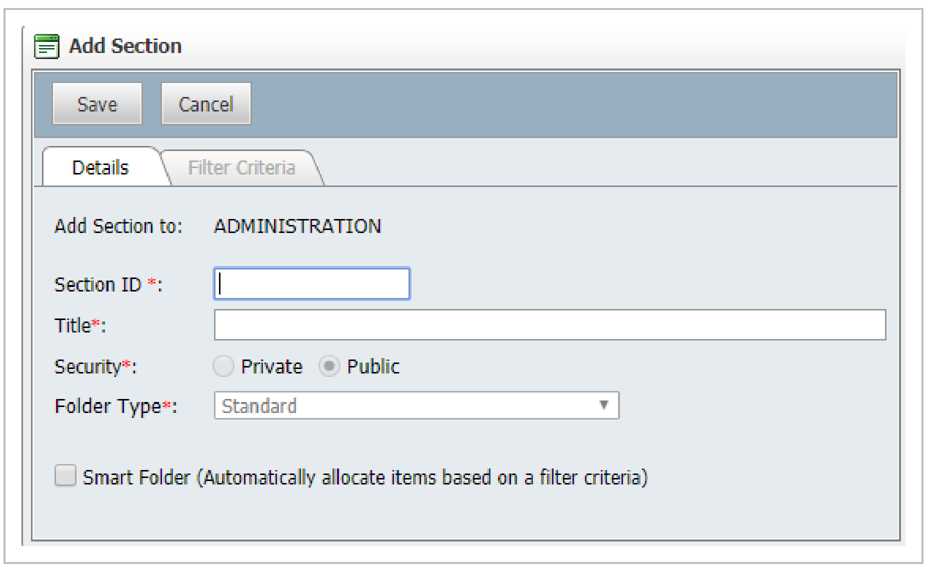
1. From any mail or document register, open the Folder pane.



2. Right click on any existing folder and select **New**.



3. Enter the **Folder ID**, **Title** and choose for the Folder to be Public or Private, click **Save.**



4. Repeat additional folders / sections. All “folders” under the top level are referred to as Sections in InEight Document.

NOTE

- With , users on the project can add to these Folders and all users on the project can get access to these Folders to view their contents. Limits are still in place to what they or their company has access to.
- use is restricted to only users belonging to the company that created them. Access limits still exist, for eg a user with only personal mail access can see only personal mail filed.
- To copy a complete branch of the **Folder** tree structure right click and select **Copy** at the top node then navigate and right click on the **Folder** you want to copy to and select **Paste**. You will be prompted to enter the ID of the top node in new branch.
- Rename and delete folders using the right click options.
- There is no limit to the number of levels in the **Folder/Section** tree structure.
- Custom fields can be added to the folder structure in addition to the ID and Title. Contact InEight for more information on this.

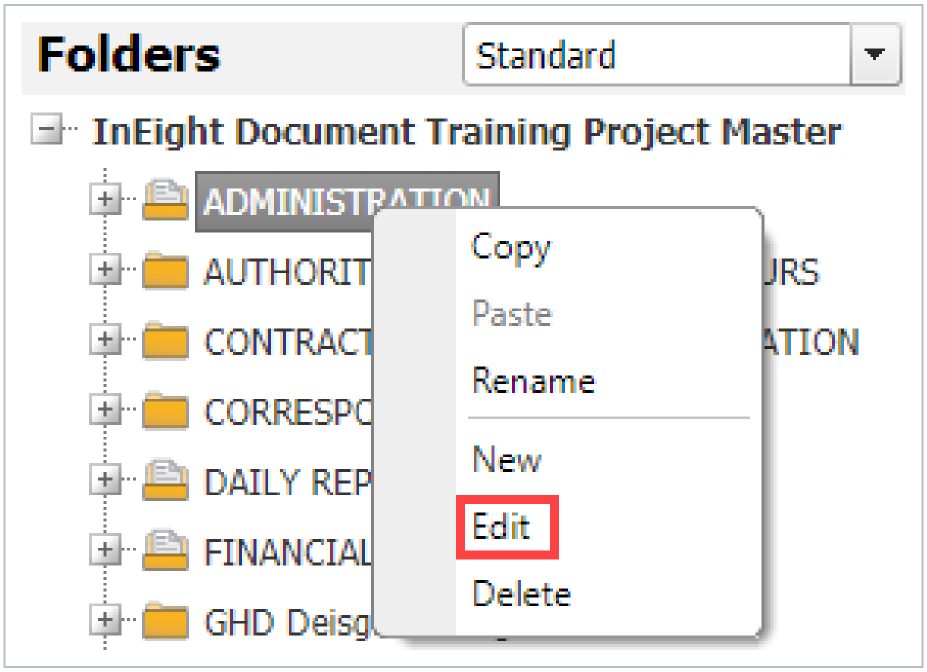
7.4.2 Using Smart Folders

Smart Folders can be used to effectively automate the filing of mail, documents and other InEight Document data into folders by defining a set of folder specific filing rules.

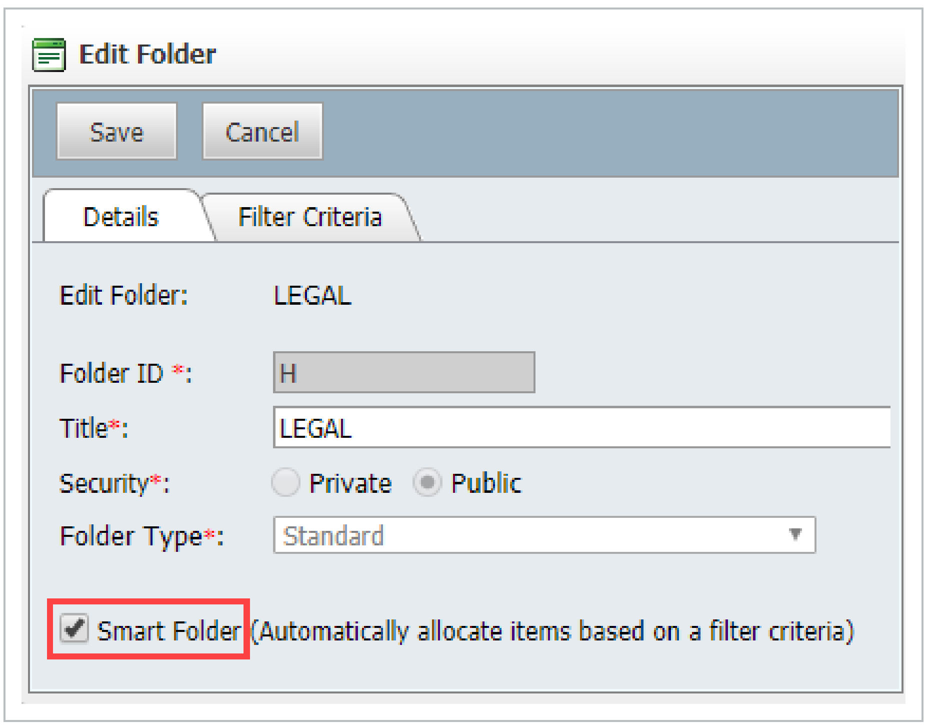
Once the filter criteria is defined, in future when accessing the folder, data will be listed based on the filter criteria and user security access.

To define a folder as a Smart Folder:

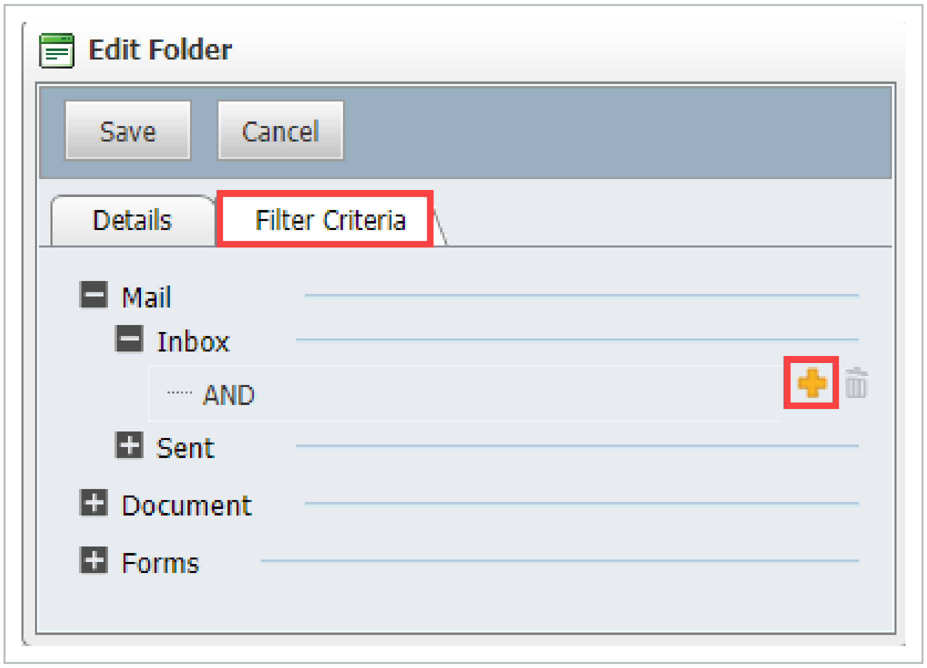
1. From within the folder view open right click on the folder and select **Edit**.



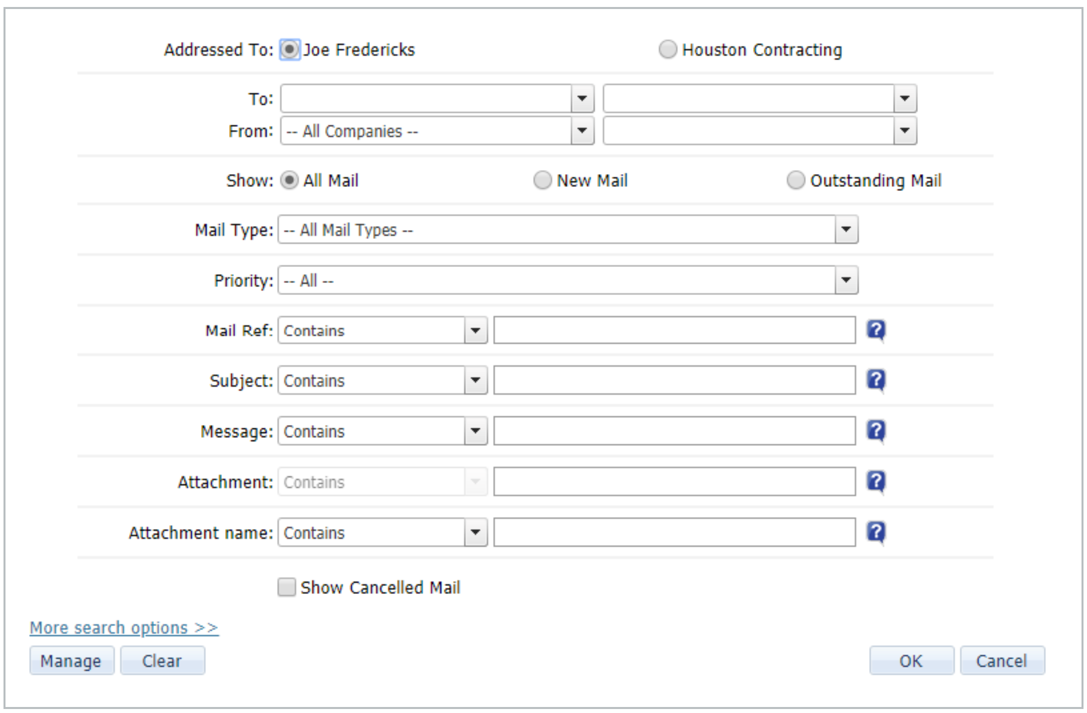
2. Tick the **Smart Folder** box.



3. Click the **Filter Criteria** tab.



4. For each module required define the filter criteria by clicking the + button and populating the Advanced Search window, then **OK**. The filter criteria will display for verification.

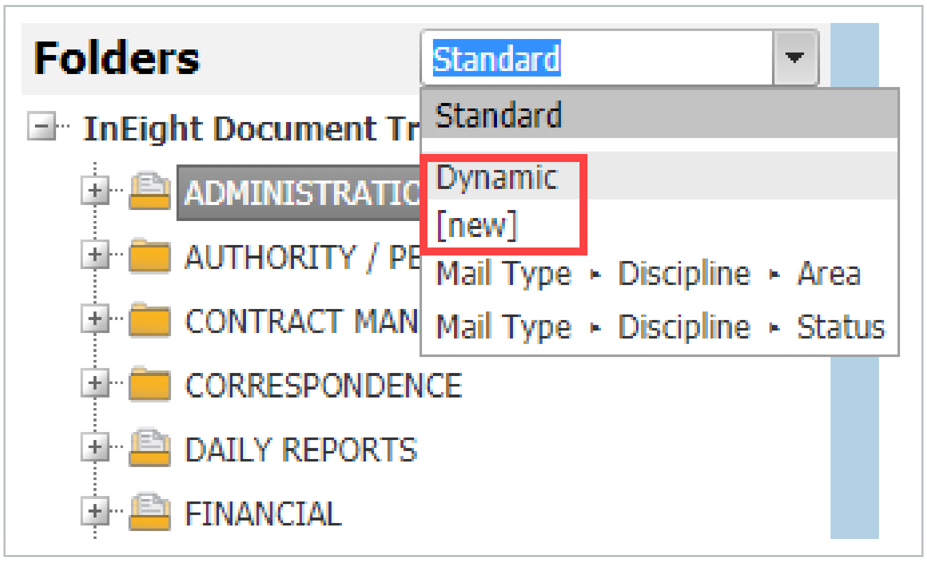


7.4.3 Using Dynamic Folders

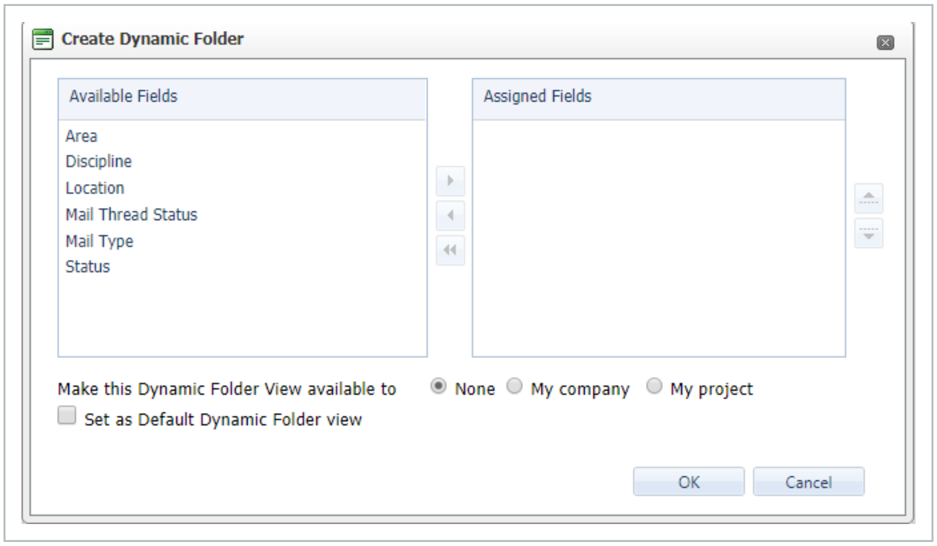
While Smart Folders can be used to automate the filing process, Dynamic folders can automate both the process of creating folders and the filing process of data into the created folders. For eg if a document is uploaded to a discipline that no folder exists for one will be created and the document filed automatically.

To define a Dynamic Folder Structure:

1. With the folder pane displayed from within any of the main registers, click the drop down list at the top of the folder pane and click **New** under **Dynamic**.



2. At the **Create Dynamic Folder** select the top level field of your Dynamic folder structure from the list of available fields and click the arrow button to move the field into the Assigned fields list.



3. Repeat for the field required at the next level down within the Dynamic folder structure.
4. If the Dynamic Folder structure is to be made available to other users within your company or users within other companies, click the relevant option against **Make this Dynamic Folder view available to**.
5. Click **OK**. Your new Dynamic folder view will now be available via the drop down list at the top of the folder pane.

NOTE

- To make a Dynamic Folder view as the default folder view, tick the box against **Set as Default Dynamic Folder view**.
- Multiple Dynamic Folder structures can be defined.

7.5 PROJECT ARCHIVES

Project Archives are available any time for any company using InEight Document on a project. For Projects using InEight Document via the ASP model, Project Archives must be requested and are created by InEight and charges apply. For Projects being self-hosted by a customer, Project Archives must be requested and created by the self-hosting company.

A Project Archive for a company consists of the following:

1. All **mail** generated by or received by the company.
2. All **documents** the company uploaded or has access to.
3. All **comments** and **redlines** made by the company against documents they have access to.
4. All **comments** and **redlines** made by **reviewers** belonging to the company during workflows.

5. All **transmittals** sent or received by the company.
6. All **packages** created by the company.
7. All **published reports** belonging to the company.
8. All **notifications** sent to the company.
9. The project **address book**.

The above data is archived to a storage media, together with a copy of TBARCHIVE, InEight's unique application for viewing project archives. TBARCHIVE is a complete application enabling a company to view their project archive the way it was viewed within InEight Document. TBARCHIVE also includes a Global Search engine to search for information within the Archive.

Contact InEight for more information about Project Archives.

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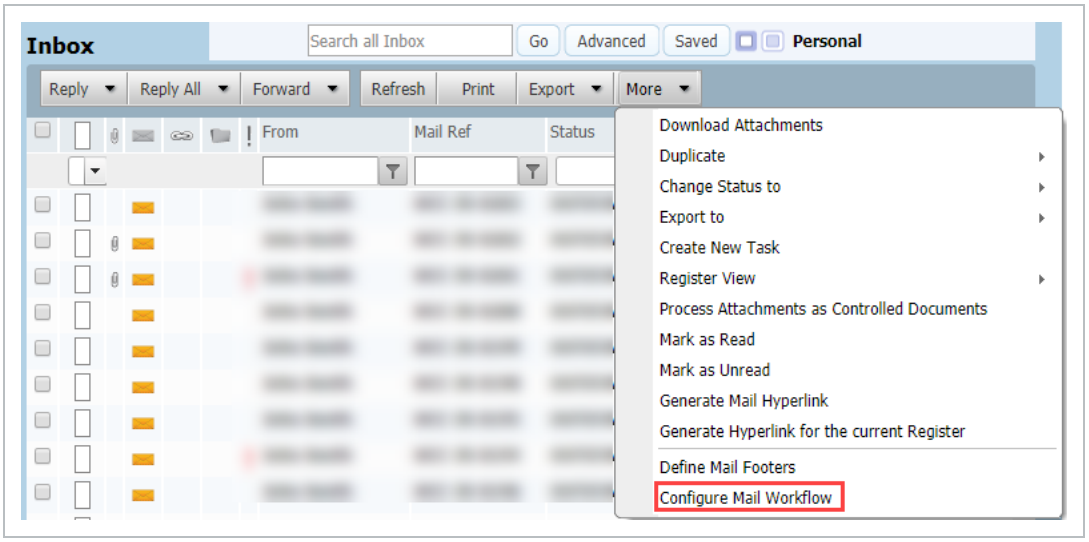
CHAPTER 8 – MAIL ADMINISTRATION

8.1 WORKFLOW

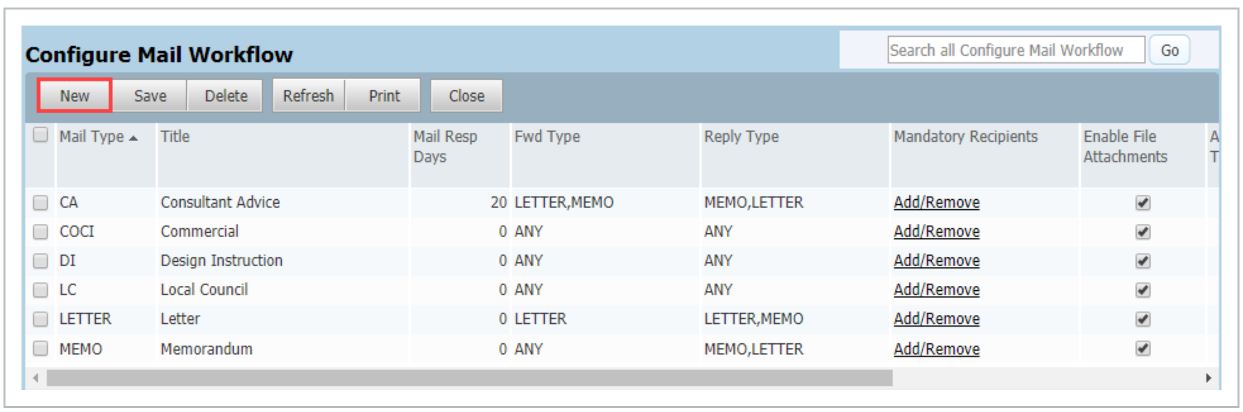
Project Administrators have the ability to add additional mail templates to the system using any existing template as a basis for the new template. Managing the workflow for each type of mail being used on an InEight Document project allows better control over what options users have in each Mail Type.

8.1.1 Create a New Mail Workflow

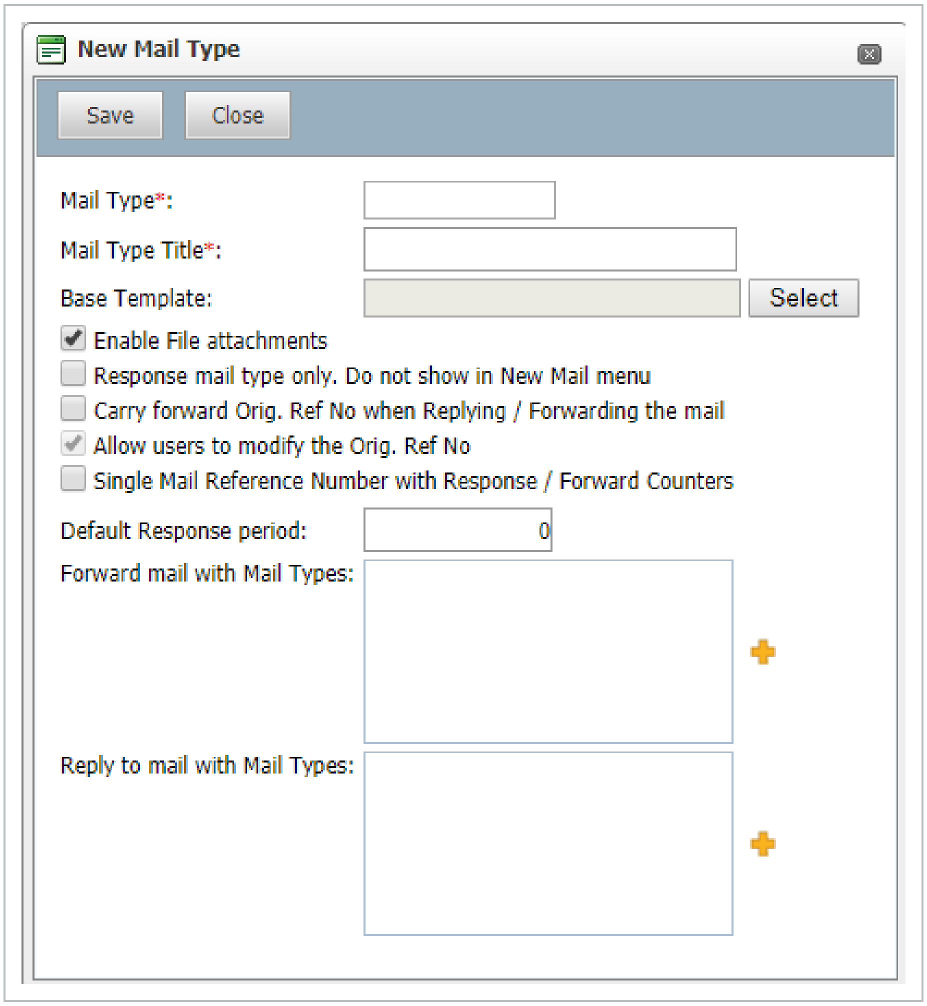
1. From within the Inbox or Sent Items registers, go to **More**, then **Configure Mail Workflow**.



2. Click **New**, enter a **Mail Type** ID and **Mail Type Title**.



3. Populate the following fields:



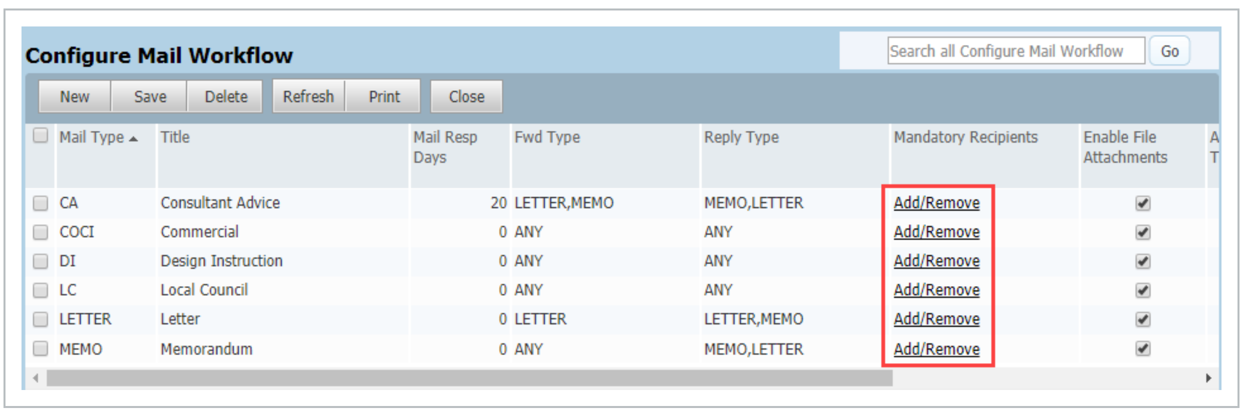
- **Base Template:** select a template from the predefined library that shows the input and output screen of the mail type.
- **Enable File attachments:** untick this option to prevent users attaching files to this mail type.
- **Response mail type only:** if the mail type is only to be used when replying to other mails enable this option. If ticked this mail type will not be available via the New button, only when using Reply and Reply All.
- **Carry forward Orig. Ref No when Replying /Forwarding the mail:** when replying to or forwarding mails of this type the mail reference from the mail being forwarded/replied to will be auto copied to the Originators Reference No. field of the new mail.
- **Allow users to modify the Orig. Ref No.:** the Originators Reference No. field will be editable when creating a new mail using Reply or Forward.

- **Single Mail Reference Number with Response/ Forward Counters:** will retain the original reference number but add a counter at the end for any mail that has been responded to or forwarded.
- **Default Response period:** number of days after the current date the “respond by” date will auto populate. The calculation is based on working days as defined by the Project Calendar.
- **Forward mail with Mail Types:** controls the type of mail that can be used to forward the current mail type with. Use the + button to select the required mail types.
- **Reply to mail with Mail Types:** controls the type of mail that can be used when replying to the current mail type. Use the + button to select the required mail types.

4. Click **Save**, then **Close**.

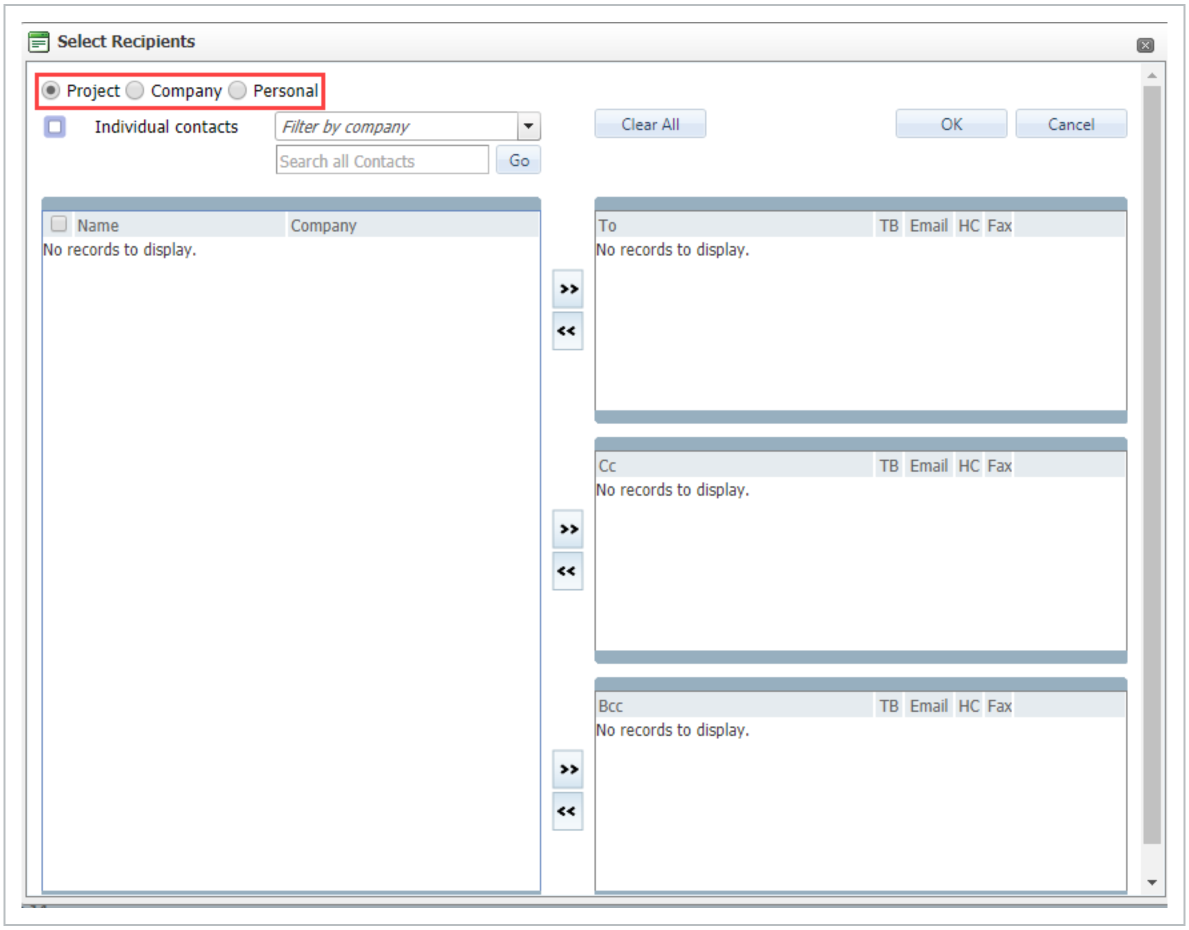
8.1.2 Add Mandatory Recipients:

1. From the **Configure Mail Workflow** screen, click **Add/Remove** link under the **Mandatory Recipients** heading next to the required mail type.



Mail Type	Title	Mail Resp Days	Fwd Type	Reply Type	Mandatory Recipients	Enable File Attachments	A T
CA	Consultant Advice	20	LETTER,MEMO	MEMO,LETTER	Add/Remove	✔	
COCI	Commercial	0	ANY	ANY	Add/Remove	✔	
DI	Design Instruction	0	ANY	ANY	Add/Remove	✔	
LC	Local Council	0	ANY	ANY	Add/Remove	✔	
LETTER	Letter	0	LETTER	LETTER,MEMO	Add/Remove	✔	
MEMO	Memorandum	0	ANY	MEMO,LETTER	Add/Remove	✔	

2. Select whether the mandatory recipients for the mail type are to be applied on a **Project**, **Company**, or **Personal** basis.



3. Select one or more Mandatory Recipients to be included in the **TO** and / or CC distribution for all mails of the selected Type using the company drop down list and right arrow button.
4. Click **OK**.

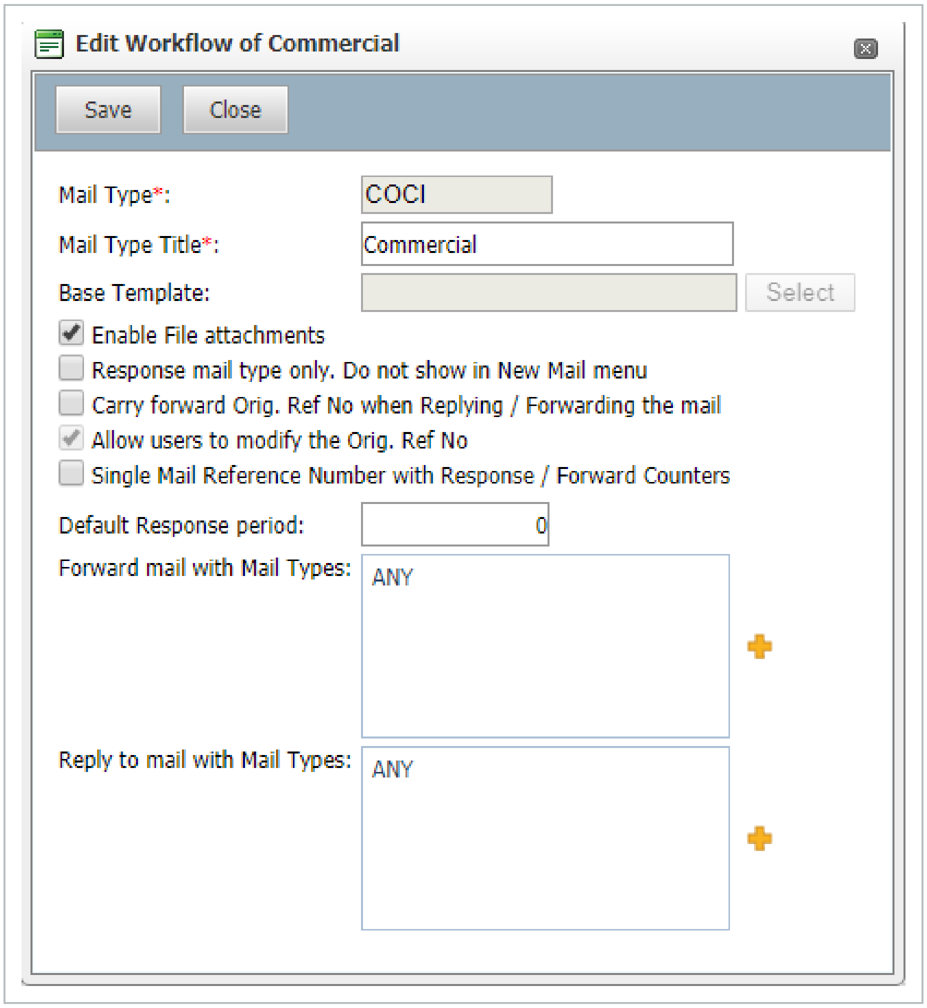
NOTE

- Any user can define Mandatory Recipients on a Personal basis.
- Users can only remove mandatory recipients defined by the Project or Company Administrator if the recipient(s) are currently unable to receive the mail type, or the sender is restricted from sending mails to the recipient.

8.1.3 Edit Mail Workflow

To edit a mail type:

1. At the **Configure Mail Workflow** window, double click to open the mail type.



2. Edit details as required.
3. Click **Save**.

NOTE

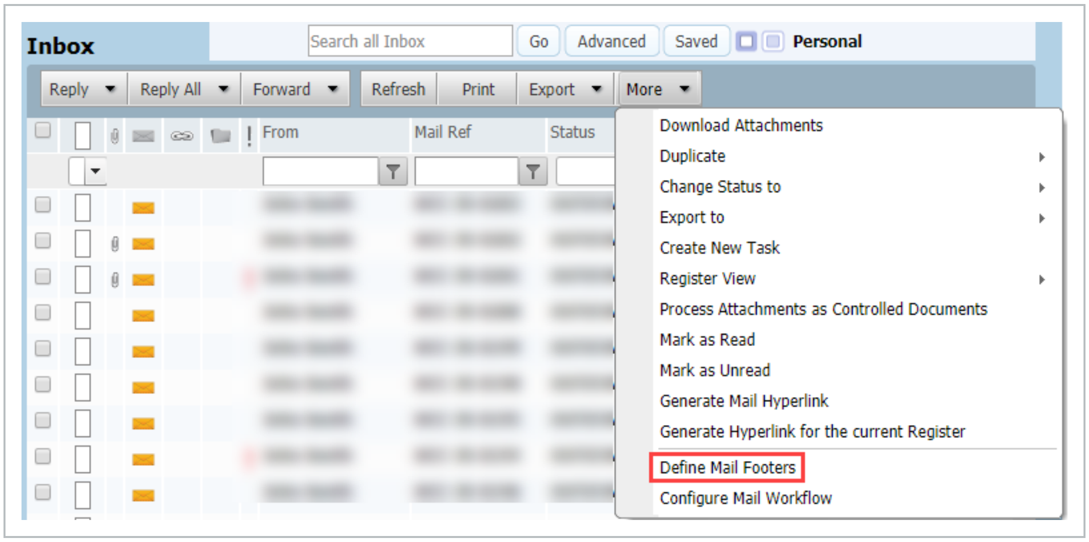
- New mail types will have all the features of existing mail type on which they are based such as sequential numbering within the mail type.
- To delete a mail type (that has not been used) select it then click **Delete**.
- New mail types can be further customized if required by InEight.

8.2 CUSTOM MAIL FOOTERS

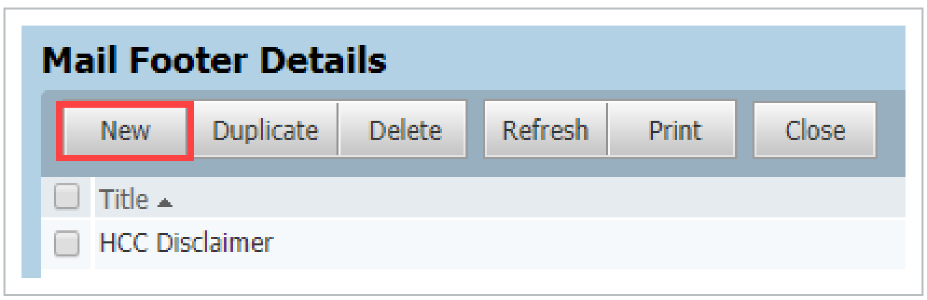
Custom footers allow a user or company to have one or more standard footers to affix to the bottom of their outgoing correspondence.

To define a custom mail footer:

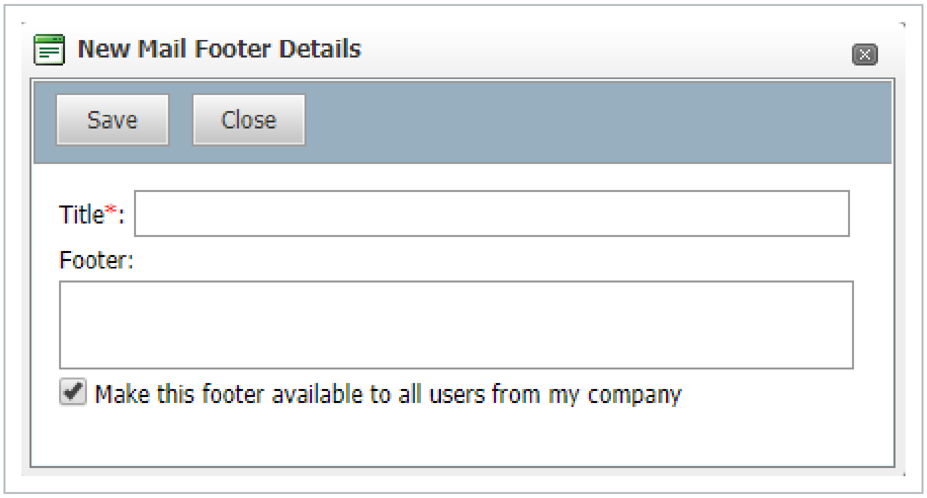
1. Go to the Inbox or Sent items register, **More** then **Define Mail Footers**.



2. A register of existing custom footers will be displayed. An existing footer can be edited by clicking on it.
3. At the **Mail Footer** details window, click **New**.



4. Enter a **Title** for your mail footer. This will be displayed in a drop down list when creating new items of mail.



5. Enter the **Text** for the Footer.
6. If required, tick **Make this footer available to all users from my company**. This will enable other users from your company to use the custom footer.
7. Click **OK** and **Save**.

NOTE

- Custom Mail footers can be created by any user.
- Users can choose their preferred default custom footer.

8.3 INTEGRATED EMAIL SERVICE

InEight Document can automatically route normal emails sent to a Project based company email address, directly into the system electronically.

This facility can be provided on a per receiving company (or department), per project basis. Any company on the project who wants to allow people to send them communications by email rather than by logging into InEight Document can arrange the activation of the Email-In feature by contacting InEight.

The process for applying, activating, and using the Email-In service is summarized as follows:

1. A decision is made by a company on a project to use the Email-In service.
2. The company contacts InEight who arranges an email address specifically for this purpose (only InEight can arrange this).
3. The company then notifies their own staff for the purpose of forwarding project related emails into InEight Document and external parties to email into InEight Document.

4. Any emails sent to the email address set-up will appear in InEight Document in the Unregistered mailbox where they are processed. This task is normally allocated to a nominated person who checks for incoming emails daily.
5. The person nominated views all incoming emails received and assigns the correct TO, FROM, CC and Mail type details after viewing the electronic copy of the email on line. The FROM person will be auto mapped if their email address exists in the project address book.
6. InEight Document then processes the email as though the sender had created it on line from within InEight Document.
7. The Sender also receives an email advising them that the email has been received and processed.

NOTE

- Setup email address can be found under **Companies**, open the Company, **Email-in address**.
- Fax can be setup in a similar way to Email, a nominal monthly charge applies.
- It is possible to have a single Email-In address that is used to receive mail from multiple projects. All such mail is routed into a single nominated project and from that project can be read and transferred to the correct project. Contact InEight for more information.

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CHAPTER 9 – DOCUMENT ADMINISTRATION

The InEight Document module is used to control and streamline the process of managing the storage and distribution of project documents.

The basic steps in the Document management process are:

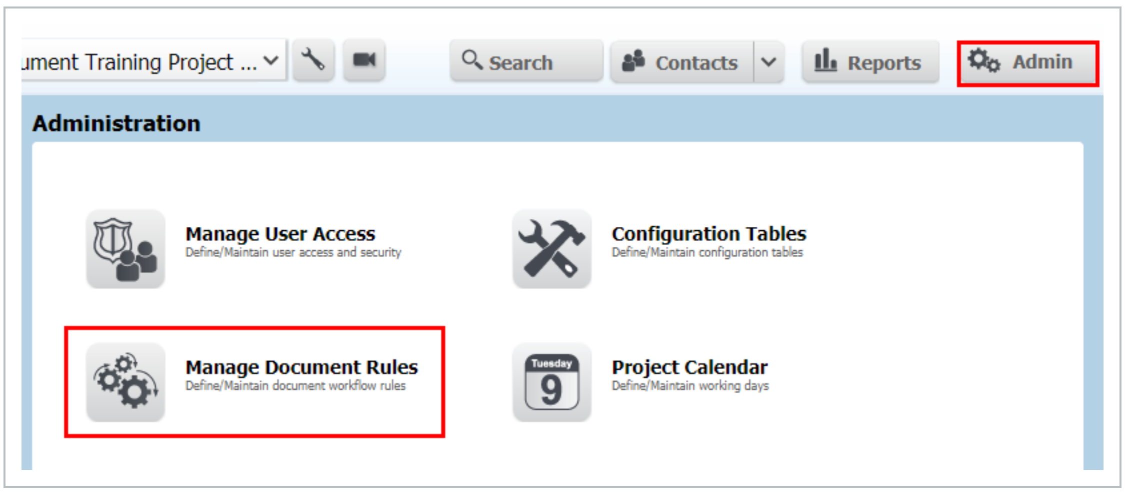
1. Documents are uploaded to InEight Document by the originating company.
2. Document Uploads are validated and posted to the document register.
3. If the uploaded documents are **un-restrained** (not requiring a review workflow):
   - The documents are displayed on the document register with the review status of 'Un-Restrained'.
   - Notifications are sent to users by email based on a distribution matrix (for new documents) and/or an access list (for revised documents).
   - Receivers of notifications can download the document from the email or from within InEight Document
4. If the uploaded documents are **restrained** (requiring a review workflow):
   - The documents are added to the document register as 'Awaiting Review/Release'.
   - A review workflow is activated and conducted.
   - Once the reviews are completed, the review coordinator applies a review status which either releases or rejects the document.
   - Users based on the distribution matrix and/or access list are notified about the released documents.
   - If the documents are rejected, the originator is notified.
   - Documents in the Document Register can be transmitted to users or grouped into packages and tender process

9.1 RULES FOR WHO CAN UPLOAD DOCUMENTS

InEight Document controls who can upload documents to the system by a flexible system of Document Rules. Upload Rules are defined in terms of key document attributes and companies are allocated to one or more rule sets meaning that they can only upload documents that conform to the rules of the rule set they have been assigned to.

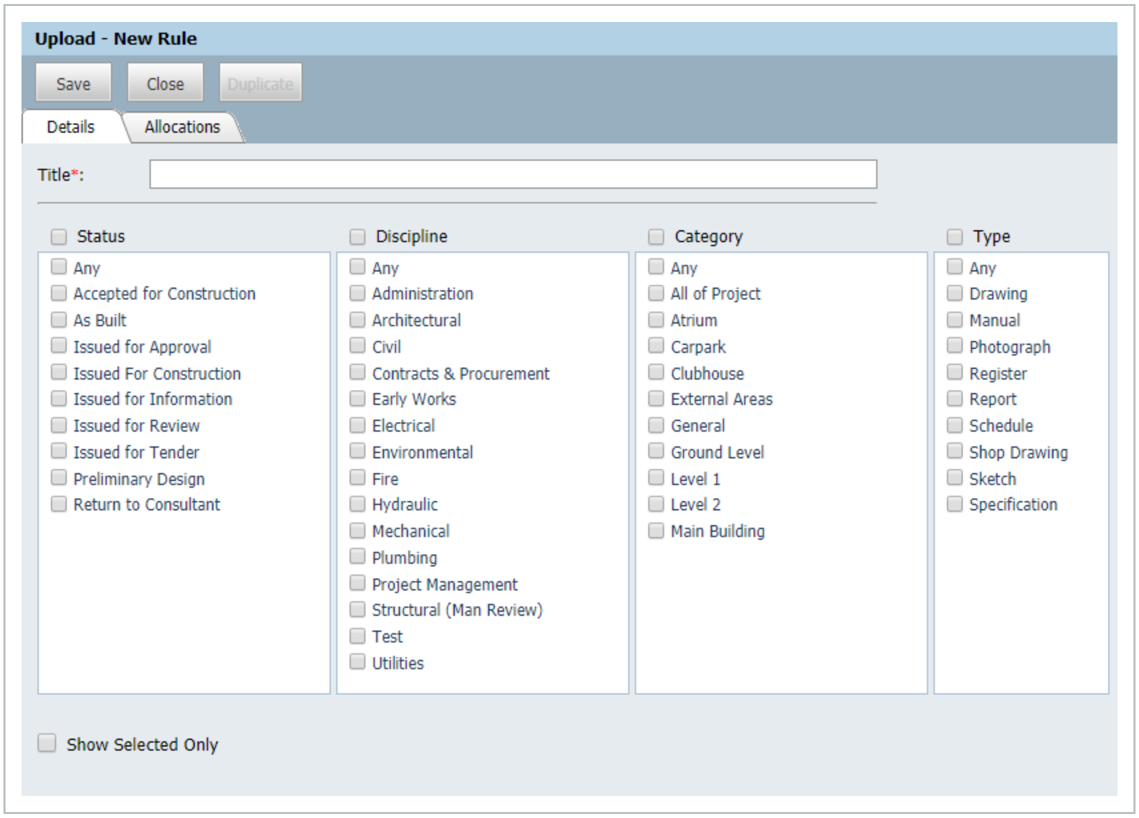
To Define Document Upload Rules:

1. Click **Admin** then **Manage Document Rules**.

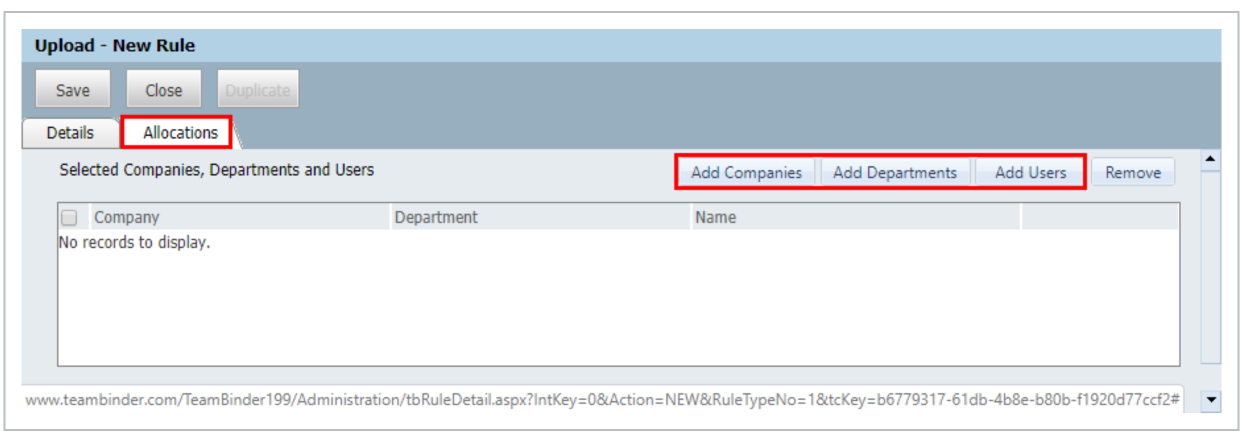


2. Select the Rule Type as **Upload**.

3. Click **New** to add a new Upload Rule.
4. Enter a **Title** (e.g. "Upload of Electrical and Fire Drawings").



5. The rules for who can upload documents for this Upload Group are controlled using any of four key document attributes which are: Status; Discipline; Category; and/or Type. **Any** indicates any value is visible or individual items can be selected.
6. At the **Details** tab, tick the attribute boxes as required to define the required attributes for this Upload Rule.
7. Click on the **Allocations** tab.



8. Assign the required companies to the Upload Rule by using **Add Companies** and moving them

from the left hand pane to the right hand pane. Alternatively use **Add Users** or **Add Departments**.

9. Click **Save** then **Close**.

NOTE

- In addition to belonging to a company assigned to one or more Upload Rules, users who need to upload documents must be assigned **Full Access** to the Document Register.
- While more than one company can be authorized to upload documents belonging to an Upload Rule set, once a document has been uploaded, generally only the company who uploaded it can upload future revisions.

9.2 DISTRIBUTION RULES

InEight Document can automate the distribution of documents uploaded to the system via rule based Distribution Rules which control:

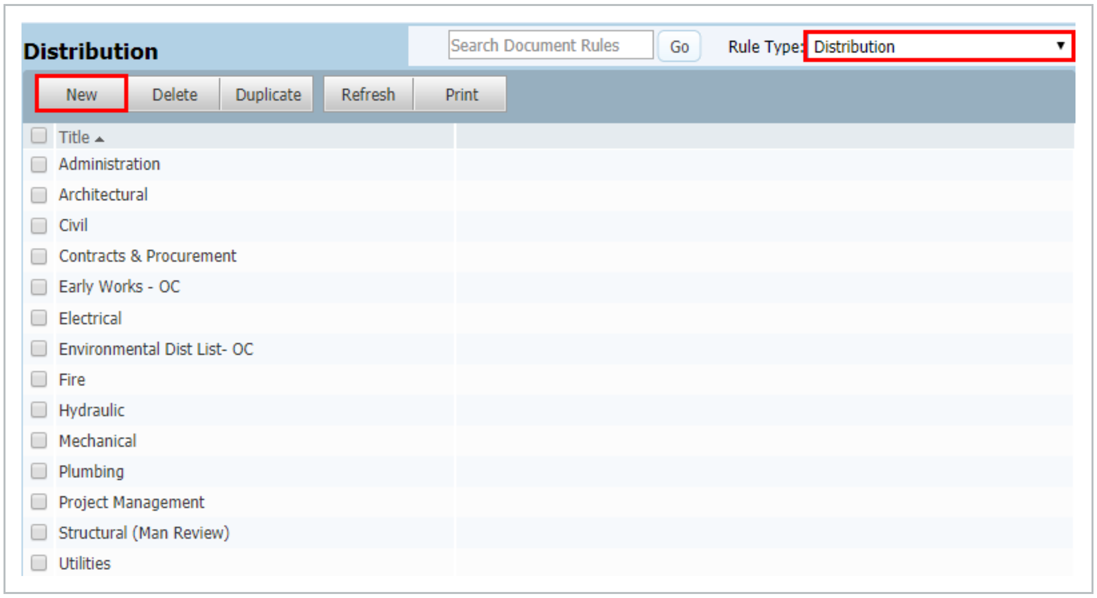
1. The default distribution (via notifications) for unrestrained documents.
2. The Format(s) of the documents each person on the distribution can download.

A user included in a Distribution Rule set will automatically be notified when documents meeting the rule based criteria of the group are released in InEight Document.

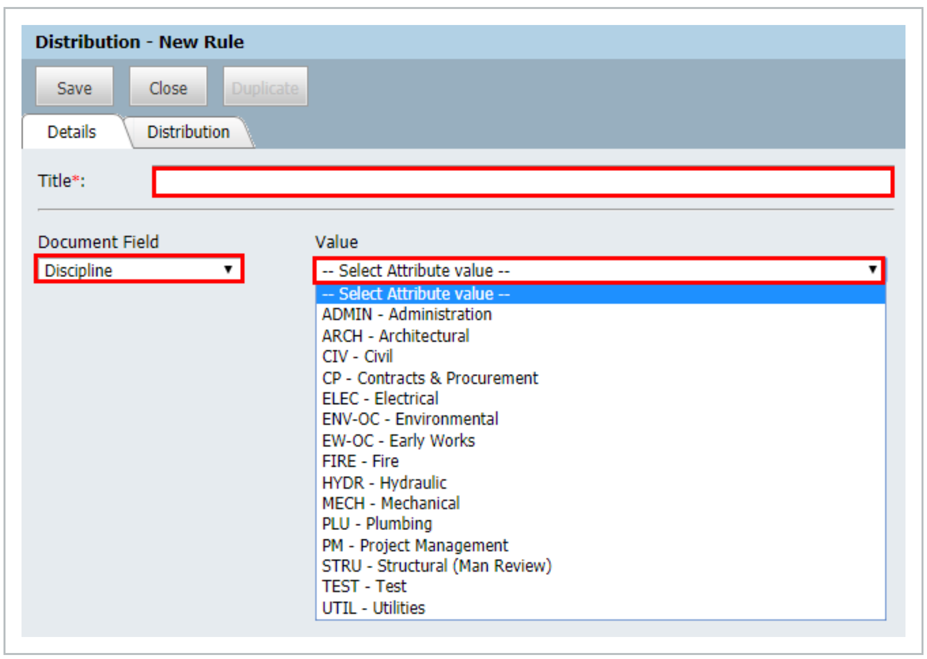
Distribution Rules are defined on a per Discipline basis.

To Define Document Distribution Rules:

1. Go to **Admin** then **Manage Document Rules**.
2. Select the Rule Type as **Distribution**.

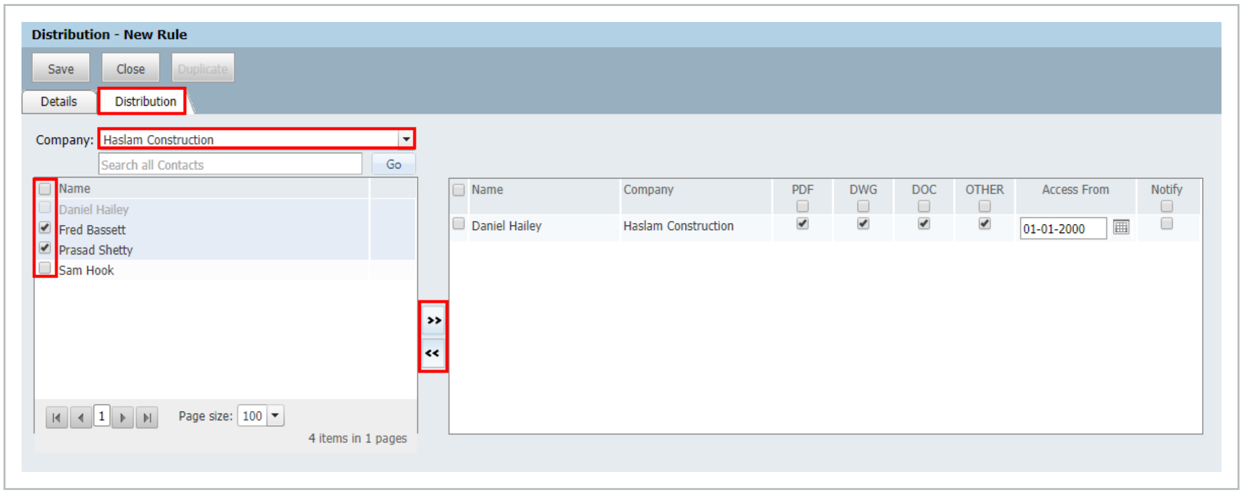


3. Click **New** and enter a Title for the Distribution Rule (e.g. “Distribution of Electrical and Fire Drawings”).



4. At the **Details** tab, select the Discipline.

5. Click on the **Distribution** tab.



6. Select the first company to add users from.
7. Select the users within the selected company to be added to this Distribution Rule.
8. Repeat steps for other companies and users.
9. Against each selected User, tick the file formats they should get access to.
10. Edit the **Access From** date if required. This is the date of document upload/creation, this user will be able to download documents of this format.
11. The Notify box is used to send notifications to the user for documents related to the discipline.
12. Click **Save** then **Close**.

NOTE

- If a person removed notifications from their User Preferences and the 'Notify' box is enabled they will still receive a notification.
- The Distribution Rules a user belongs to can also be reviewed/maintained via the Distribution Matrix tab of the Contact Details screen.
- For customers who would prefer that all documents are distributed via Transmittal, the option to use distribution rules can be removed from the system completely. Contact InEight for more information.

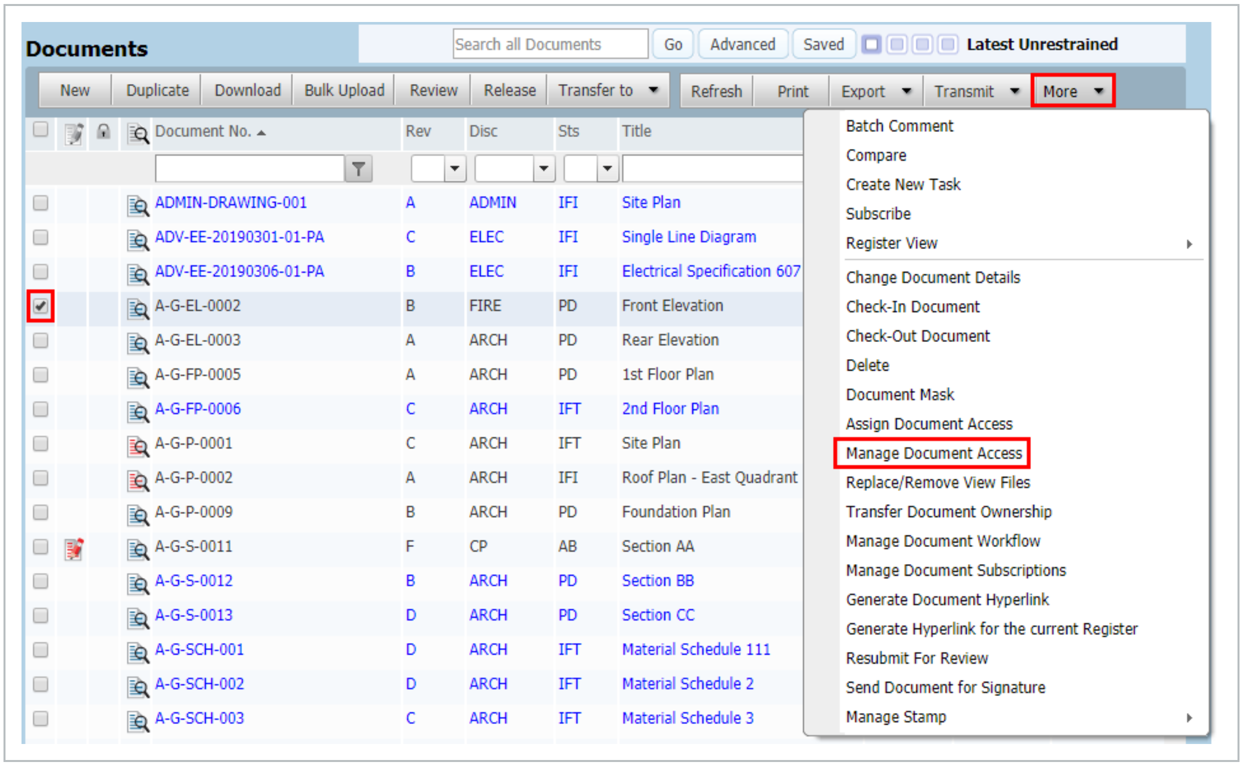
9.3 CHANGE DOCUMENT ACCESS

Users who have gained access to documents in InEight Document via transmittal get access to new revisions of the same documents by default unless the option to Notify recipients of future revisions was un-ticked.

A user's access to future revisions of one or more documents can be removed using the Manage Document Access function.

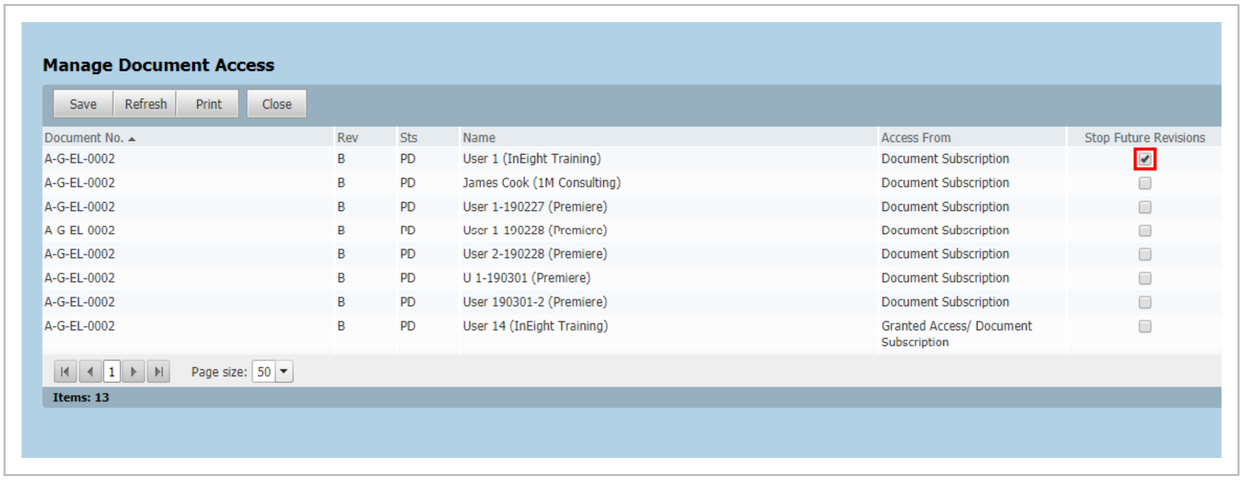
To Remove Access to future revisions of a document:

1. Go to the **Documents** register.
2. Locate and select one or more documents to change the access for within the Document Register.
3. From **More** select **Manage Document Access**.



4. At the Manage Document Access screen, tick the **Stop Future Revisions** box against the

required document + user combinations.



Document No.	Rev	Sts	Name	Access From	Stop Future Revisions
A-G-EL-0002	B	PD	User 1 (InEight Training)	Document Subscription	☑
A-G-EL-0002	B	PD	James Cook (1M Consulting)	Document Subscription	☐
A-G-EL-0002	B	PD	User 1-190227 (Premiere)	Document Subscription	☐
A G EL 0002	B	PD	User 1 190228 (Premiere)	Document Subscription	☐
A-G-EL-0002	B	PD	User 2-190228 (Premiere)	Document Subscription	☐
A-G-EL-0002	B	PD	U 1-190301 (Premiere)	Document Subscription	☐
A-G-EL-0002	B	PD	User 190301-2 (Premiere)	Document Subscription	☐
A-G-EL-0002	B	PD	User 14 (InEight Training)	Granted Access/ Document Subscription	☐

NOTE When ticking Stop Future Revisions against a document + user, this will also stop them getting access to future revisions of documents to which they received access via Subscription or by the Project Administrator granting them access.

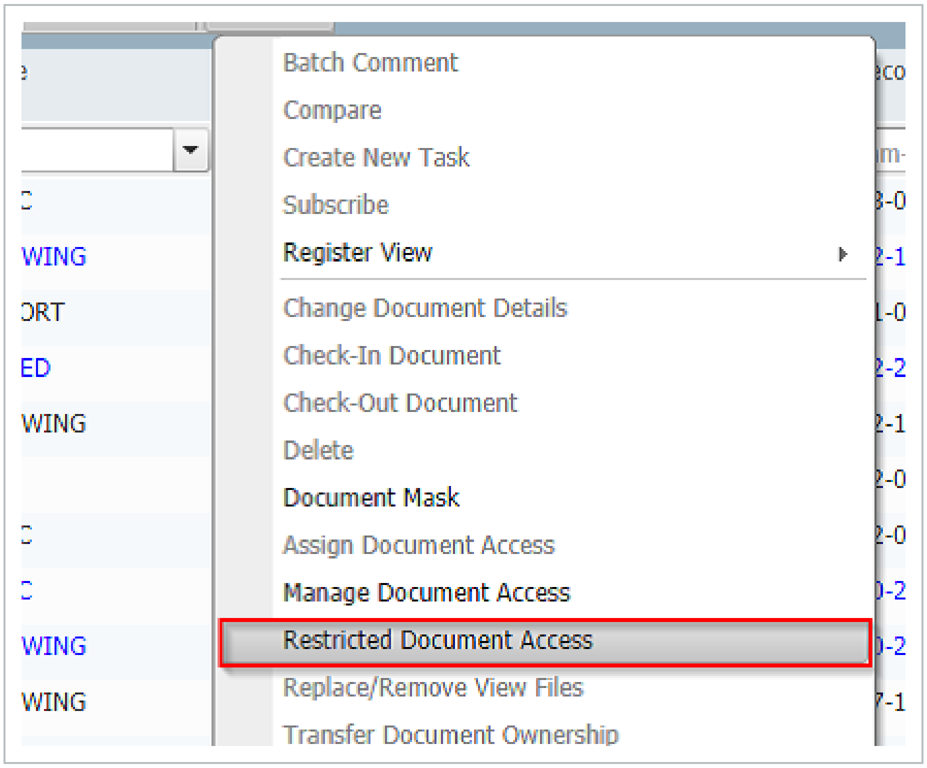
9.4 RESTRICTED DOCUMENTS

Sensitive documents can be hard to manage, requiring special clearances for access. This functionality lets administrators define which documents are restricted from the typical project configured access and security settings and which users are authorized to view them. For example, documents governed by the Restricted Document filter will not be subject to applicable distribution rules that may also affect this document. Once defined, those documents cannot be transmitted to unauthorized users.

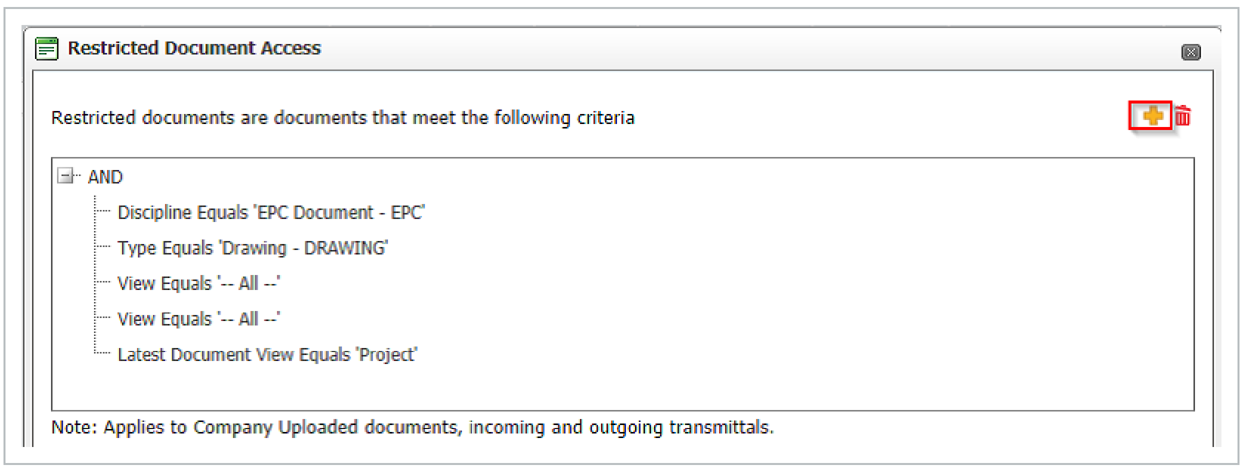
If you are interested in enabling this on your project, contact support@ineight.com

To Restrict Document Access:

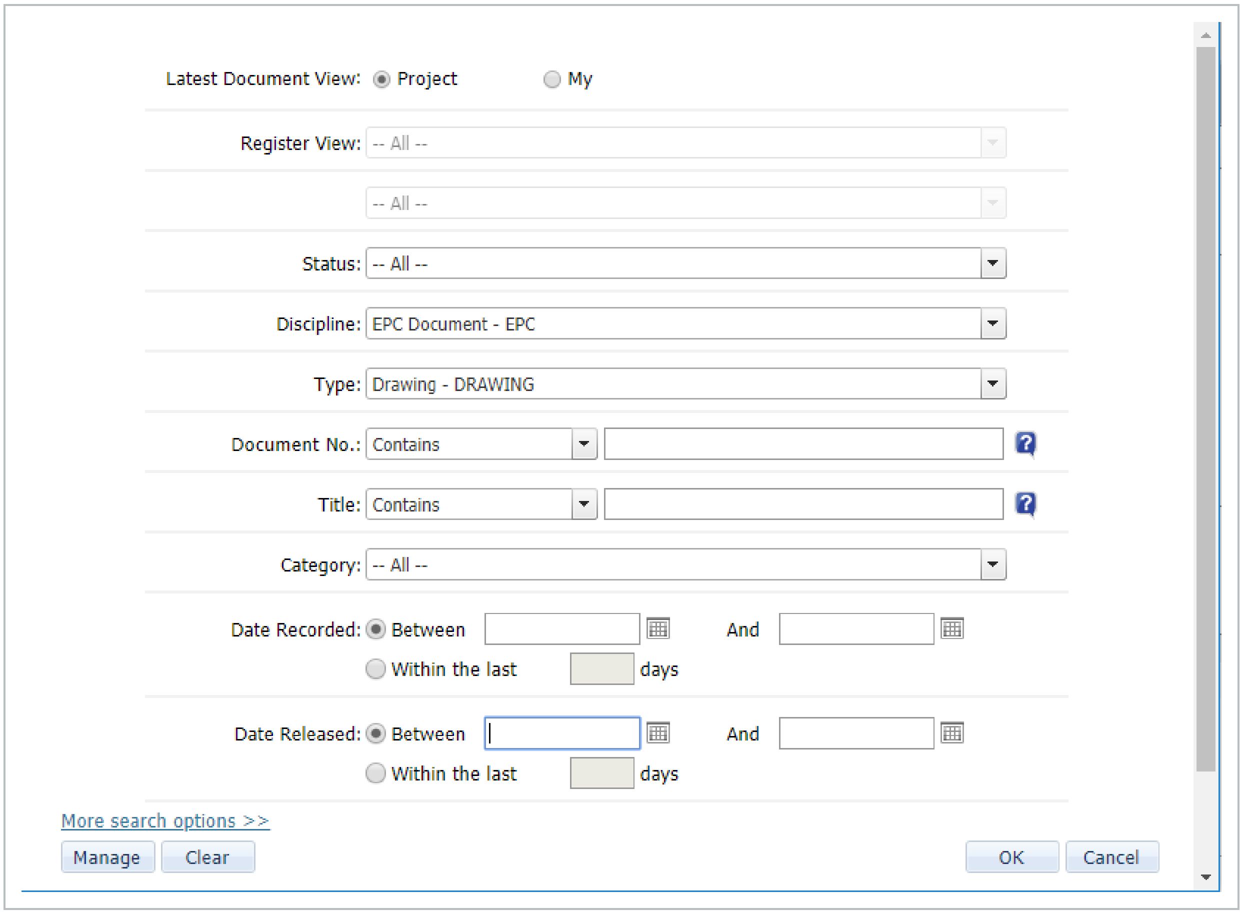
1. From the Document Register, go to **More**, then, **Restrict Document Access**.



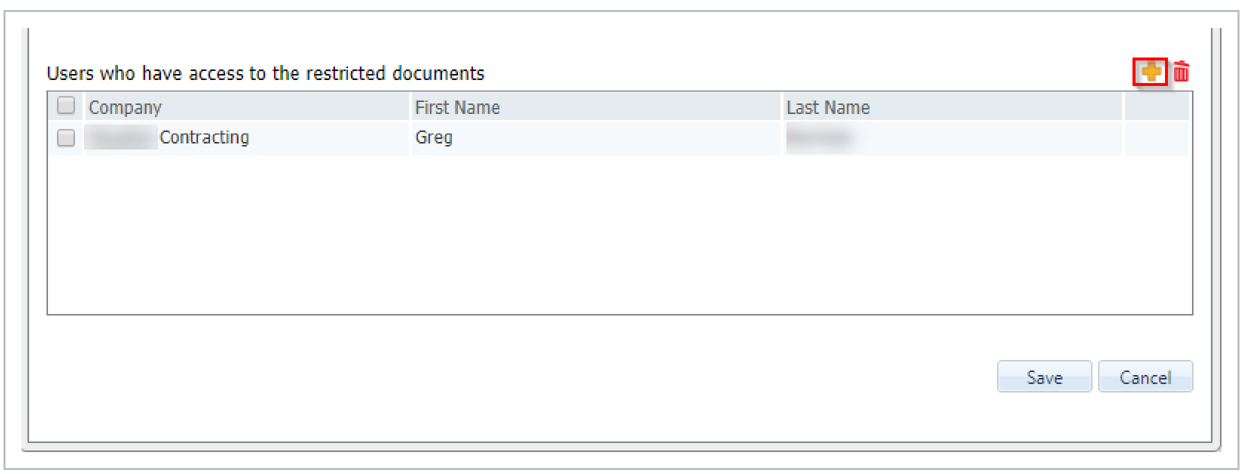
2. In the Restricted Document Access screen, click  to set the conditions.



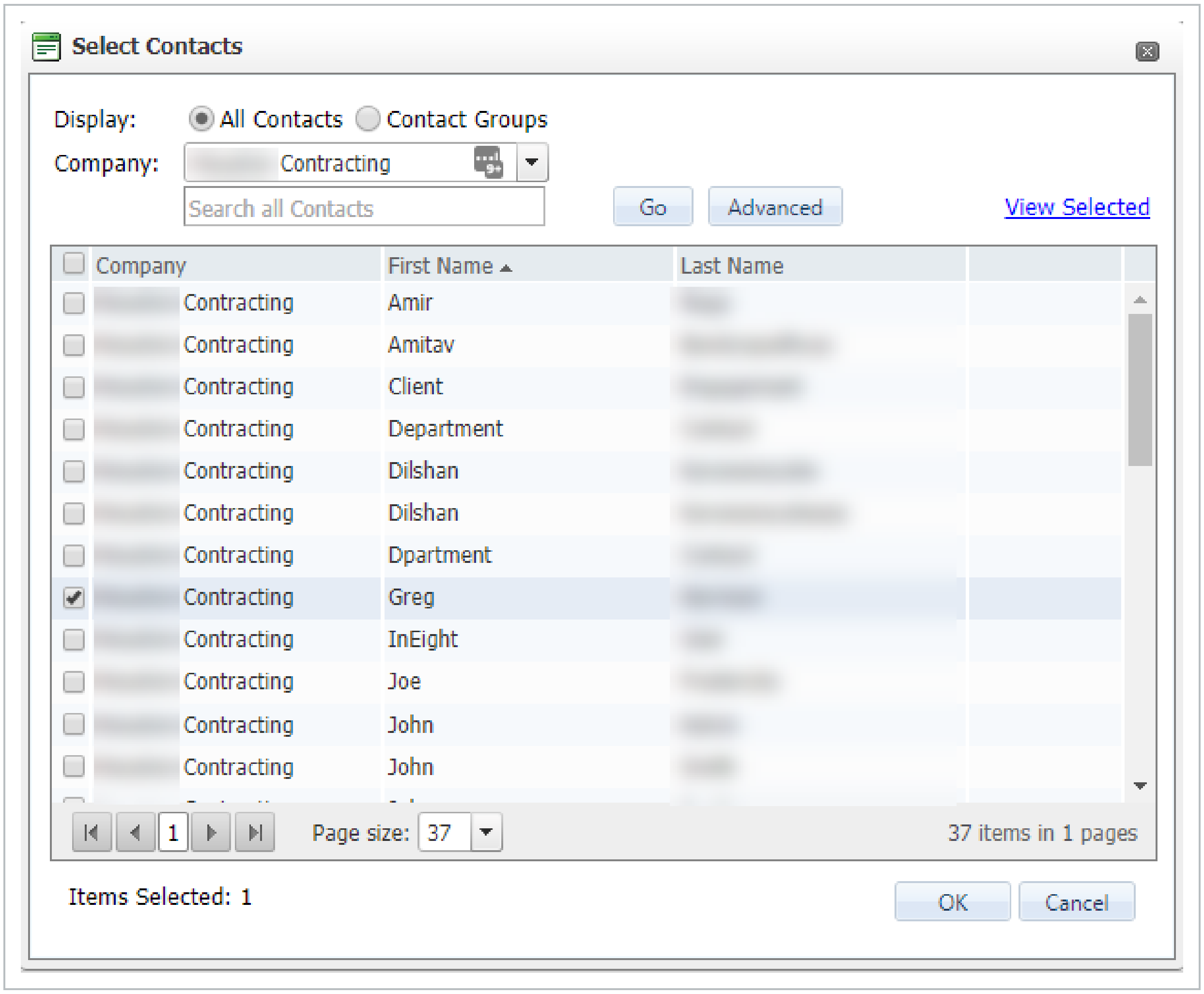
3. Once the conditions are set, select **OK**.



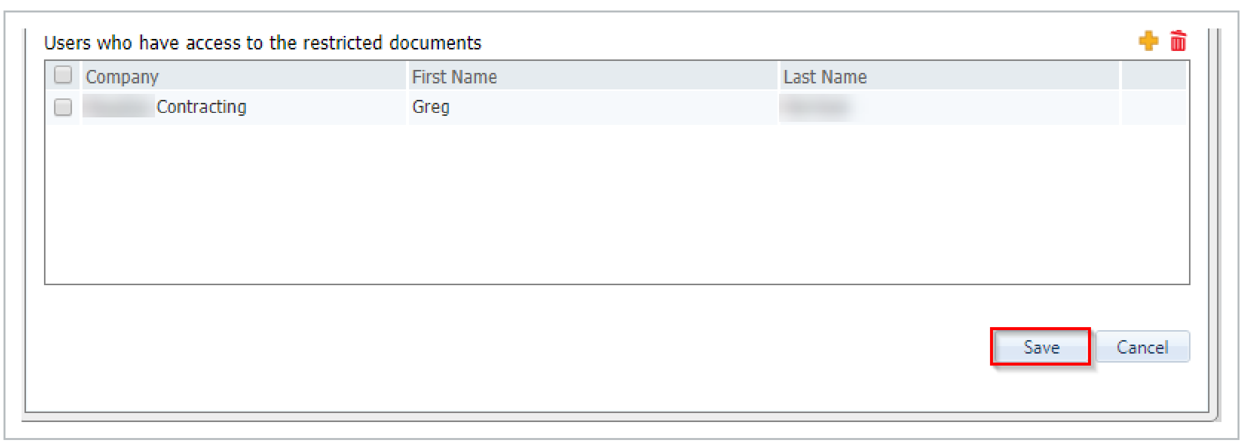
4. In the Restricted Document Access screen, select to set users that have access to the Restricted Documents.



5. Once you select users, select **OK**.



6. To apply the conditions and users, select **Save**.



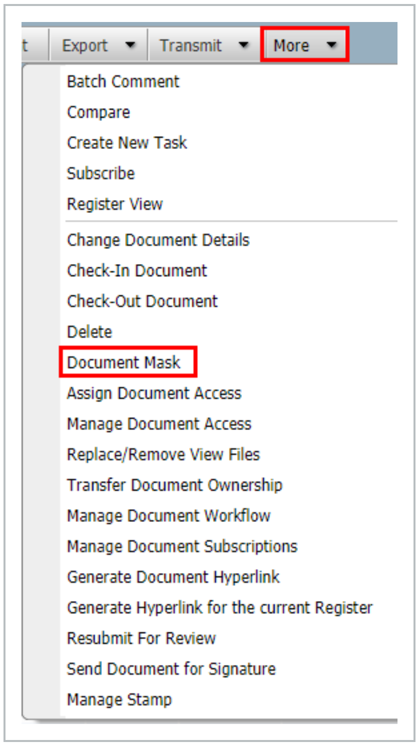
7. Once defined, those documents cannot be transmitted to unauthorized users.

9.5 DOCUMENT # MASKS

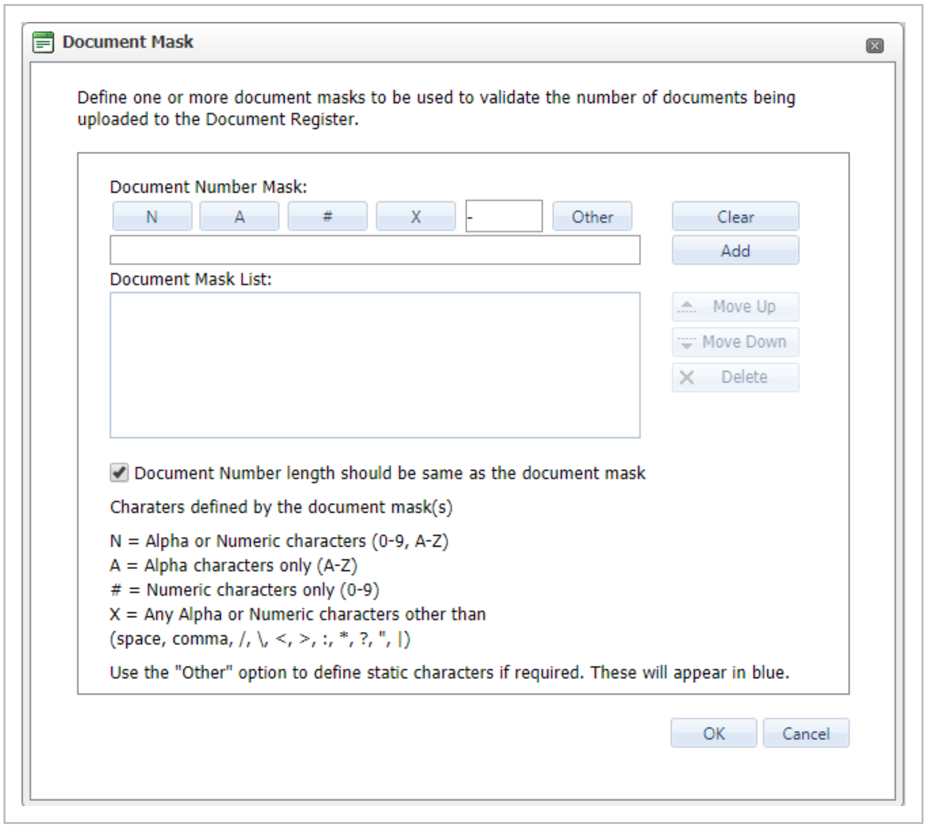
If a fixed document numbering format is to be used on a project, it is possible to define this format within InEight Document to ensure the format is adhered to for all documents uploaded to the project. Multiple fixed formats masks are also supported.

To define Document # Masks:

1. From the Document Register, go to **More**, then **Document Masks**.



2. Enter the required document number mask by clicking on the Document Mask buttons.



3. The mask can consist of any combination of the following:
   - N = Alpha or Numeric characters (0-9, A-Z)
   - A = Alpha characters only (A-Z)
   - # = Numeric characters only (0-9)
   - X = Any Alpha or Numeric characters
   - \- = Use the hyphen as a separator where required.
4. Click the **Add** button.
5. Click **OK**.

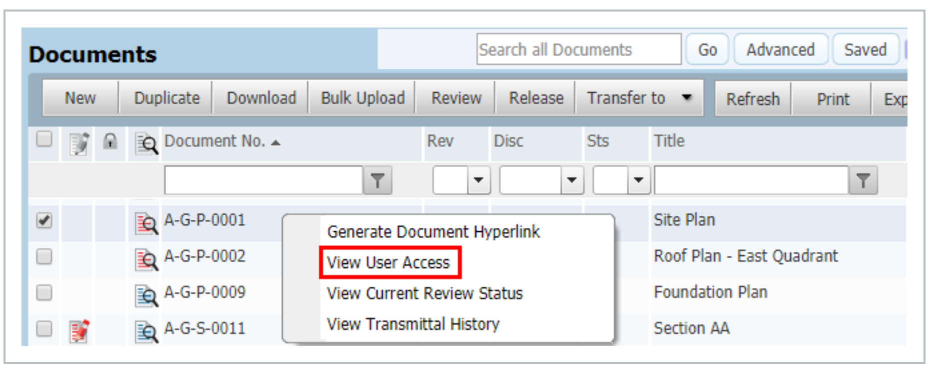
NOTE

- To control the length of document numbers. Tick the box labelled Document Number length should be the same as the document mask.
- To define fixed characters as part of the document number (for example to have the project number as the first 4 characters of all documents) using the **Other** button.
- A series of alternative masks can be used on a project. Documents uploaded must conform to one of the masks in use.
- Use the arrow buttons on the right of the screen to move a Document mask up or down, this determines the order of preference of the document masks.
- Click the **Remove** button to remove a mask from the system.
- When users are entering new documents into to the system, they will see the document mask icon in the document entry screen. They can use this icon to see the document mask(s) in use on the project.

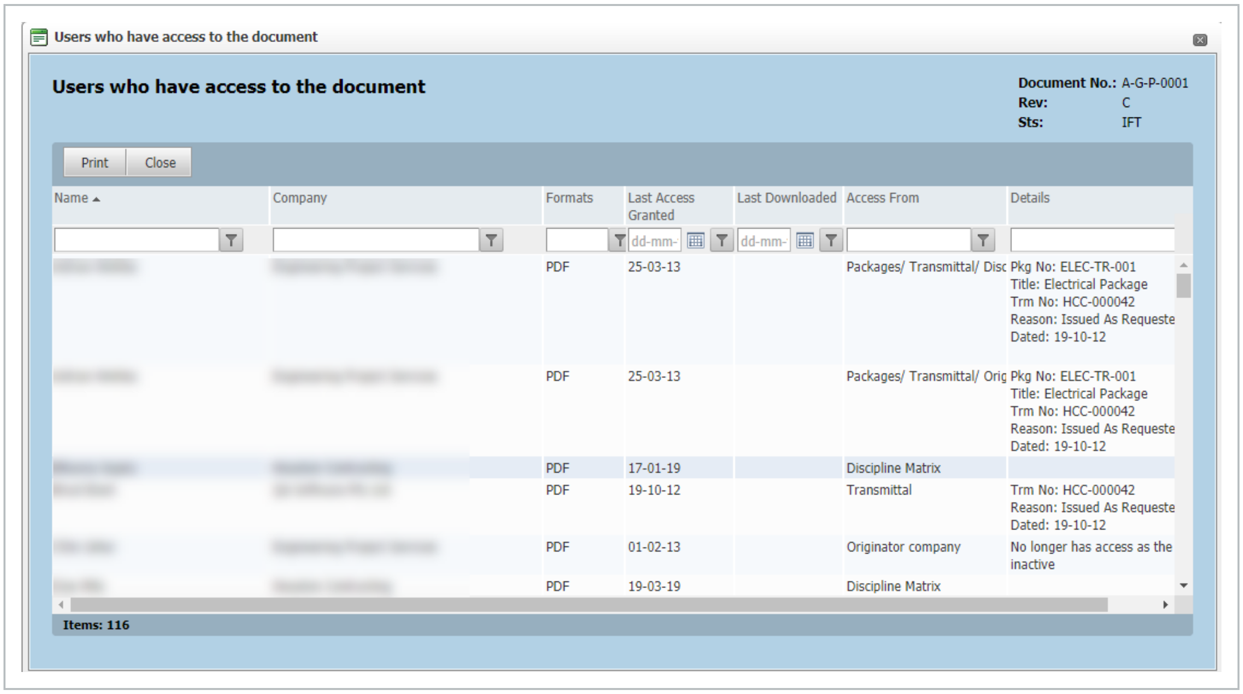
9.6 ACCESS TO A DOCUMENT

To view who has access to a document:

1. From the **Document register**, right click the document that you wish to view access rights for.



2. Select **View User Access**.



3. The user access screen will load.

NOTE

- The Format columns indicate what file formats each user has access to.
- The Access From column indicates how that user was given access.

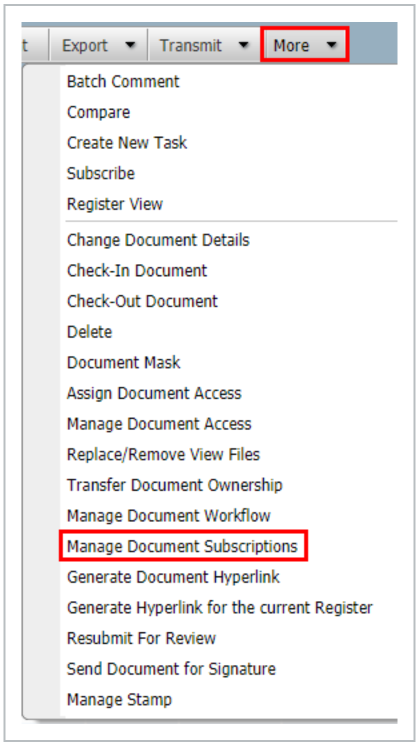
9.7 PROCESSING SUBSCRIPTION REQUESTS

A Subscription Request is a request by an InEight Document user for access to a document or document format to which they do not currently have access.

Subscription requests are processed by either the Project Administrator or Company Administrator.

To process subscription requests:

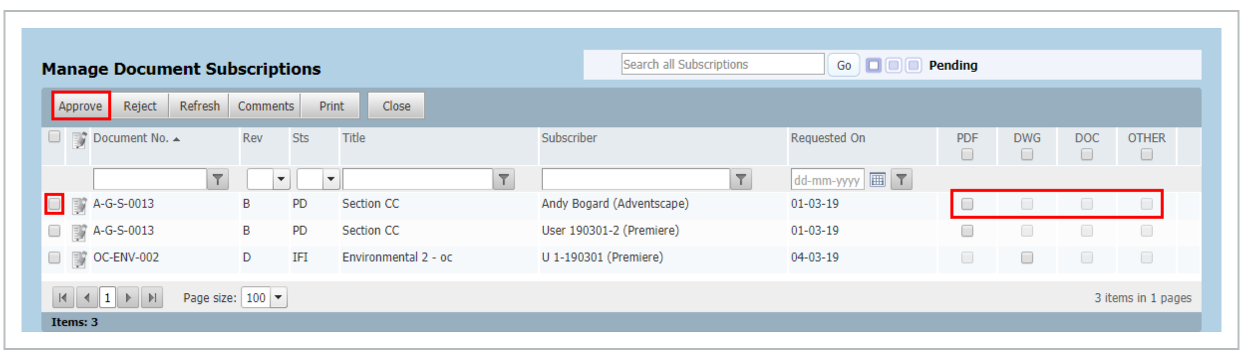
1. From within the Document Register, select **Manage Document Subscriptions** from the **More** button group of options.



2. The latest subscription requests pending your action are listed.

To approve document subscriptions:

1. Select one or more subscription requests by ticking the boxes next to the document numbers (note that each request is by a user for a particular document).
2. Tick the **file formats** against each document that the user will be able to access/download.



3. Click the **Approve** button on the toolbar.

NOTE

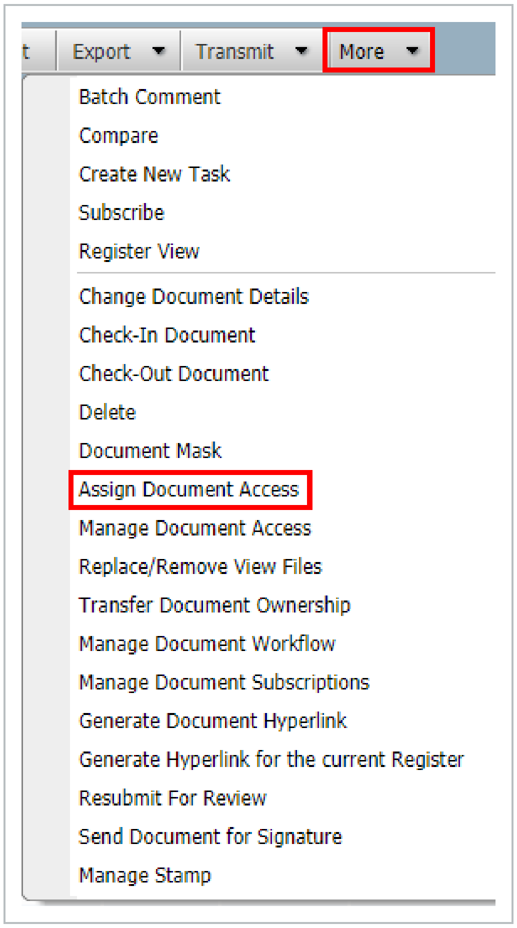
- To reject a document subscription request, simply click the Reject button.
- An email is sent to the user requesting the access notifying them of your decision.
- Click the Comments button to enter a message regarding your decision. To include the message with the email sent to the user advising them of your decision, tick the Add this comment(s) to the notification box.
- To see previously approved subscription requests, click the View Approved Subscriptions option group button at the top right of the screen.
- To see previously rejected subscription requests, click the View Rejected Subscriptions option at the top right of the screen.
- The option to allow users who get access to a document via subscription to automatically get access to future revisions can be removed from the system completely if required. Contact InEight for details.

9.8 ASSIGNING ACCESS TO SPECIFIC DOCUMENTS

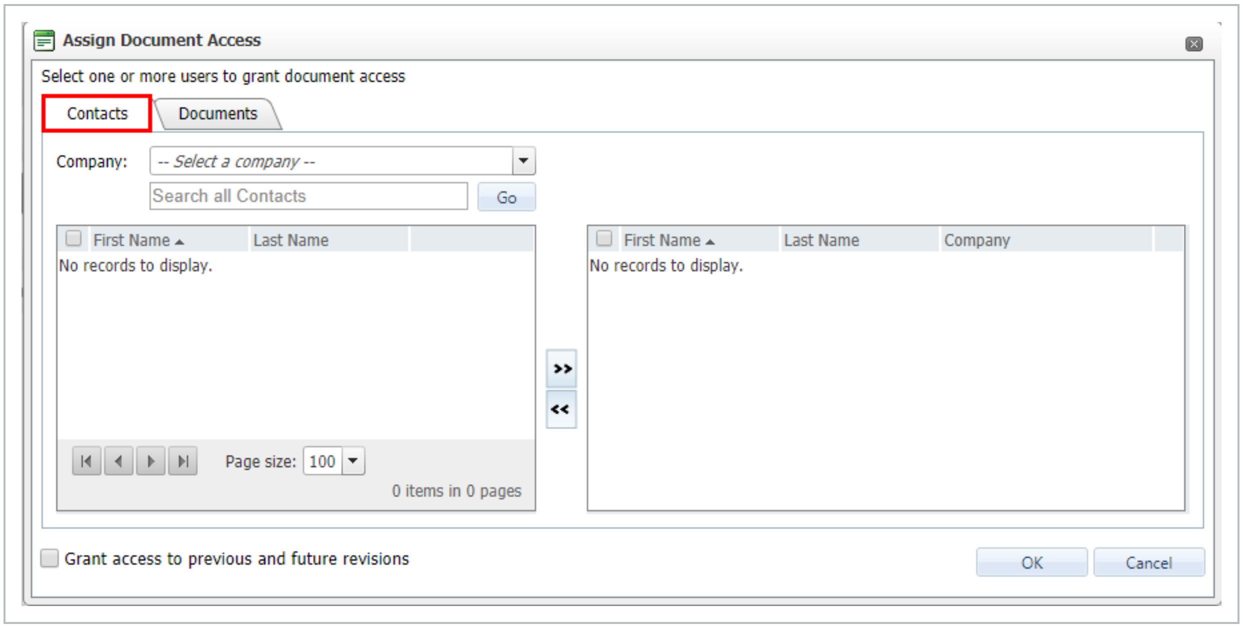
Project or Company Administrator to give access to a specific document or document format. This ability is also available to users within a security group that has this security access function allowed.

To assign access to a document:

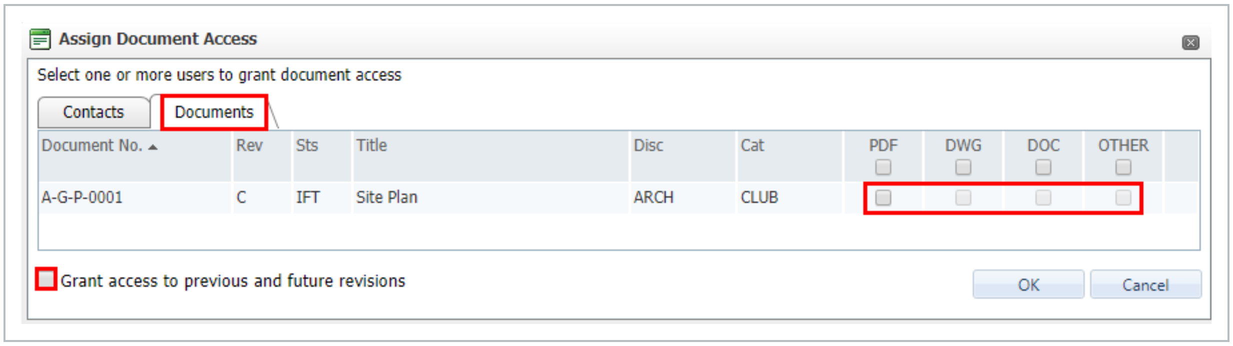
1. Go to the **Documents** register.
2. Locate and select one or more documents to assign access.
3. From **More** select **Assign Document Access**.



4. At the **Contacts** tab, select the User(s) to assign document access for by first selecting the company and then using the right arrow buttons to select the contacts.



5. Click on the **Documents** tab and select the Formats to give access to by using the tick boxes.



6. Tick/Un-tick the option to Grant Access to previous and future revisions at the bottom of the window as required.
7. Click **OK** when done.

NOTE The option to allow users to automatically get access to future revisions can be removed from the system completely if required. Contact InEight for details.

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CHAPTER 10 – TRANSMITTAL ADMINISTRATION

Transmittals are used in InEight Document to issue documents to recipients or to issue documents to non-InEight Document users.

The process of issuing documents by transmittal is as follows:

1. The documents to be issued must already exist in the Document Register and the user must have access to both the documents and the file formats to be transmitted.
2. A transmittal generation screen is used to select the documents and recipients for the transmittals.
3. A reason for issue, respond by date and message are applied/entered.
4. The recipient receives the transmittal by email from which they can download one, selected, or all of the documents.
5. The system tracks which documents the recipient downloads from the transmittal.
6. Users expedite responses to transmittals they have sent.
7. As documents are revised, the recipients are notified automatically unless the option to notify recipients about future revisions was switched off when generating the initial transmittal.
8. The system automatically tracks pending transmittals which are documents that have been issued to recipients and later revised but not yet been issued at the latest revision. Pending transmittals are very useful when automatic notification of future revisions is switched off when generating the initial transmittal.

NOTE

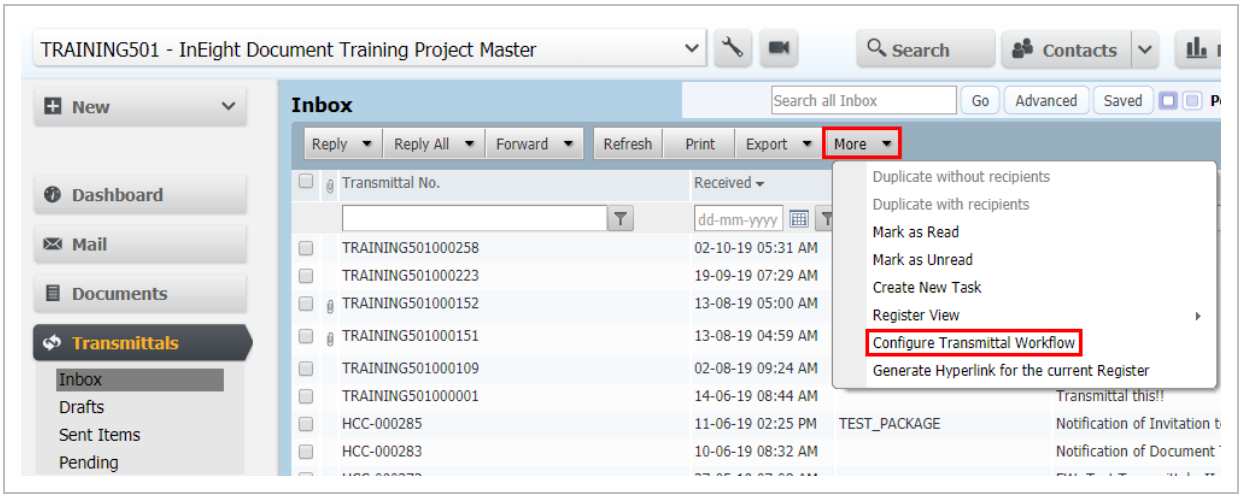
- Outgoing transmittals are stored in the Transmittals – Sent Items register.
- Incoming transmittals (from other InEight Document users) are stored in the Transmittals - Inbox with hyperlinks to the source documents.
- There is only ever one copy of each view file format for each document in an InEight Document project.
- The Format of the Transmittal notification can be customized if required (contact InEight for more on this – charges apply).

10.1 CONFIGURE TRANSMITTAL WORKFLOW

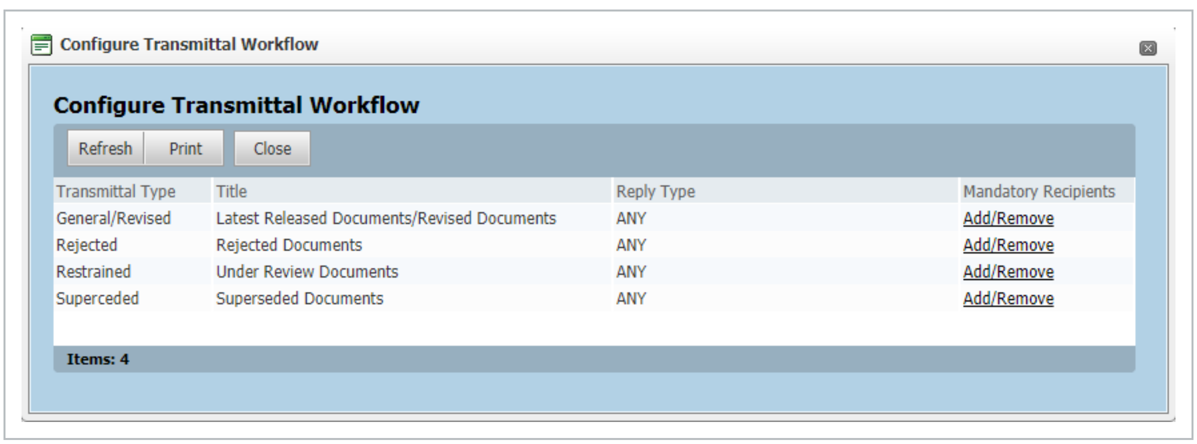
A reply to a transmittal can be generated from within the Incoming Transmittals register using an item of Mail creating a link.

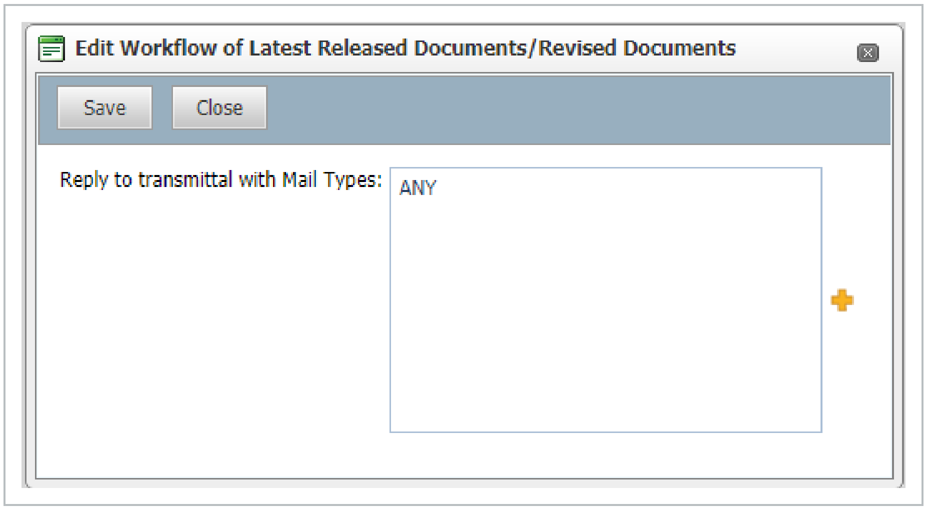
To configure a Transmittal Workflow:

1. In the Transmittal Inbox or Sent Items go to **More**, **Configure Transmittal Workflow**.

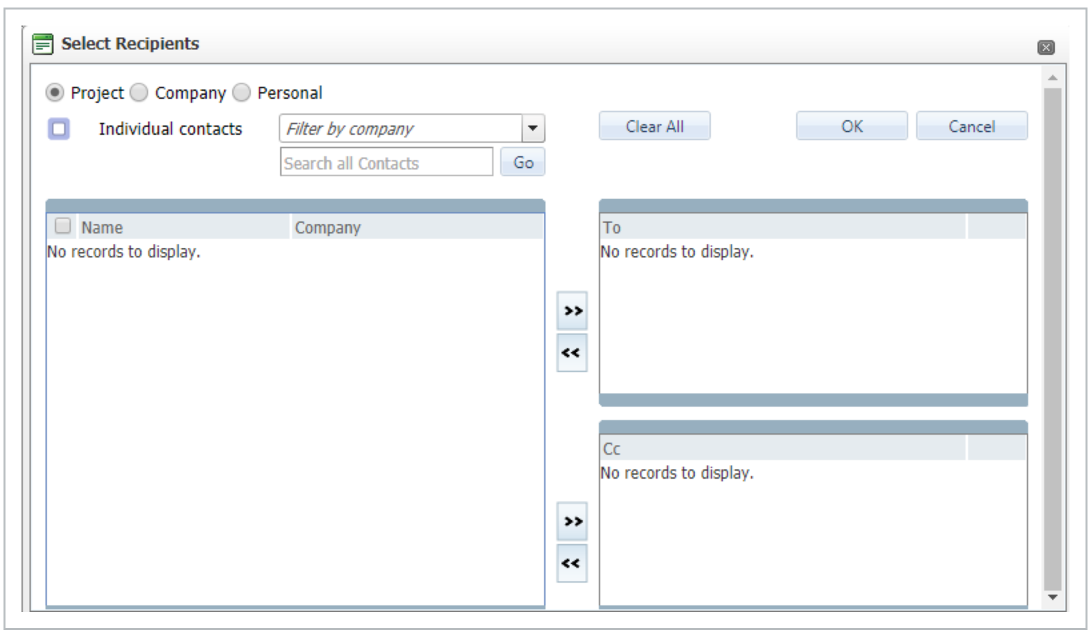


2. Double click the Transmittal type to open.





3. Use the + button to select the relevant mail types. Select a specific mail type, ANY for any mail type or N/A if replying to transmittals using Mail is to be prevented.
4. Click **Save**.
5. Repeat for all Transmittal Types.
6. **Mandatory Recipients** can also be added or removed in the **Configure Transmittal Workflow** window.



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CHAPTER 11 – WORKFLOW ADMINISTRATION

11.1 OVERVIEW

The steps required to configure InEight Document to manage workflows are:

1. Confirm Review Status Codes (Configuration Tables).
2. Define the Review (Y/N) Rules.
3. Define the Review Initiators.
4. Define Review Teams and Review Settings.
5. Confirm Project Settings relating to Review and Approval.

NOTE

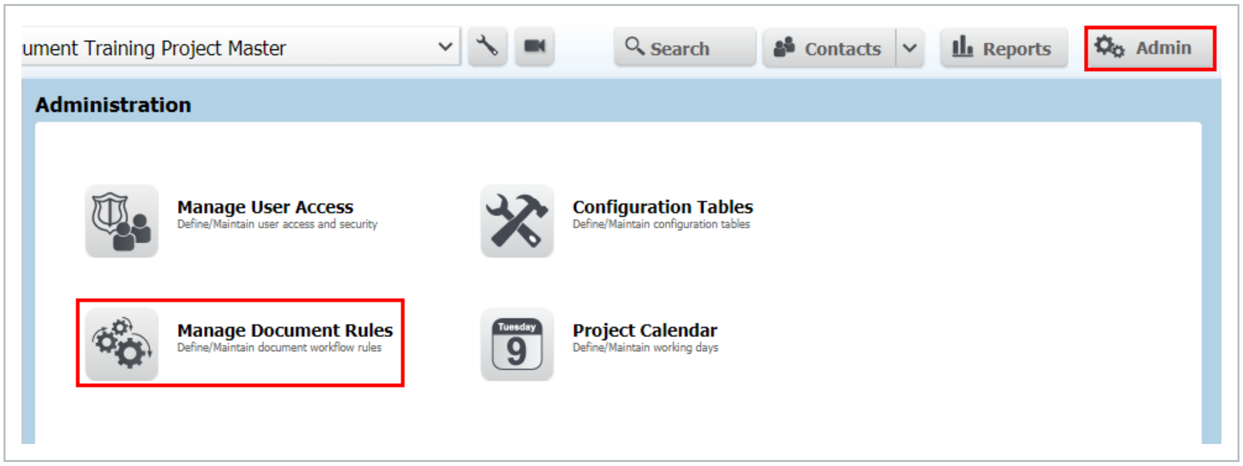
- If required reviewers can create sub review workflows initiating a workflow within a workflow. This feature is not enabled on all projects – contact InEight Document for more details.
- It is possible to use other Document attributes to define Review (Y/N), Review Initiator and Review Team rules. This has to be configured by InEight and charges may apply.

11.2 REVIEW (Y/N) RULES

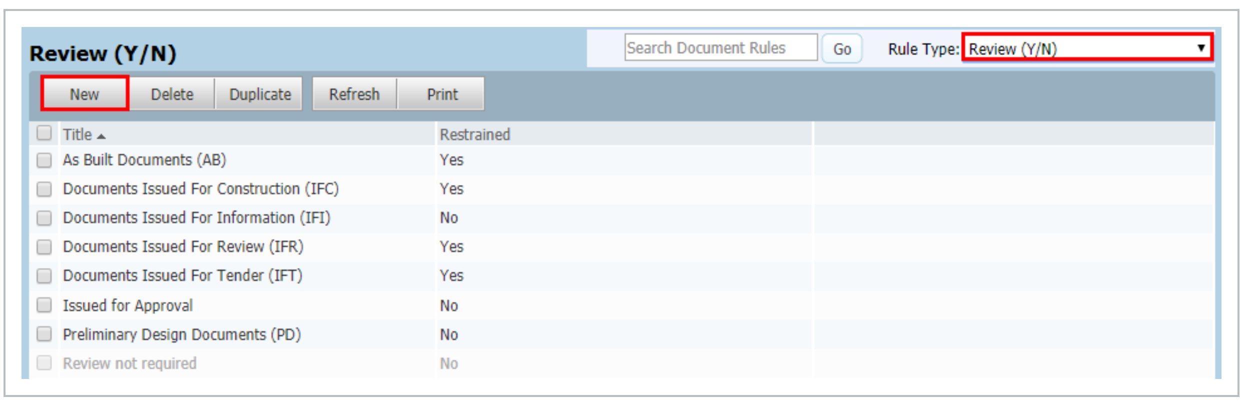
The Review (Y/N) is triggered from the Status assigned to the document. This then determines if there is a requirement for a document to be reviewed. A document that requires review is defined as restrained needs to be passed through a review workflow before it is released.

To define Review (Y/N) Rules:

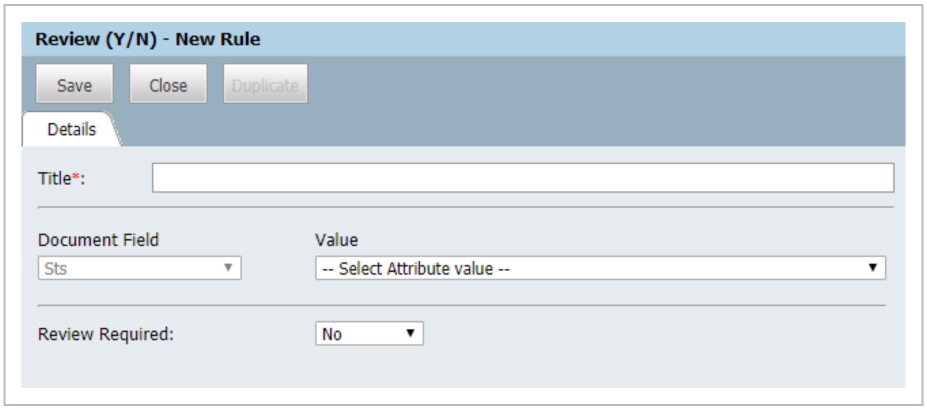
1. Go to **Admin** then **Manage Document Rules**.



2. Select **Review [Y/N]** from the drop down list.



3. Click **New** and enter a **Title**.



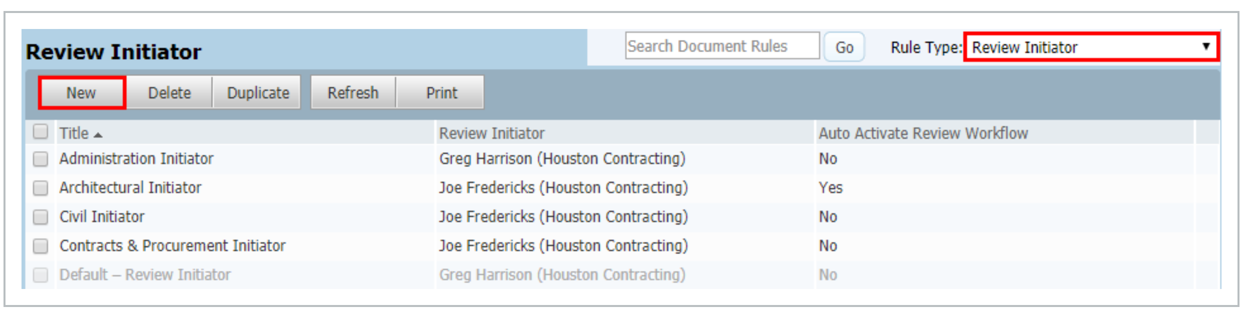
4. Select the **Status** value.
5. Choose **Yes** or **No** against **Review Required**.
6. Click **Save** then **Close**.
7. Repeat steps for additional review rules.

11.3 REVIEW INITIATOR RULES

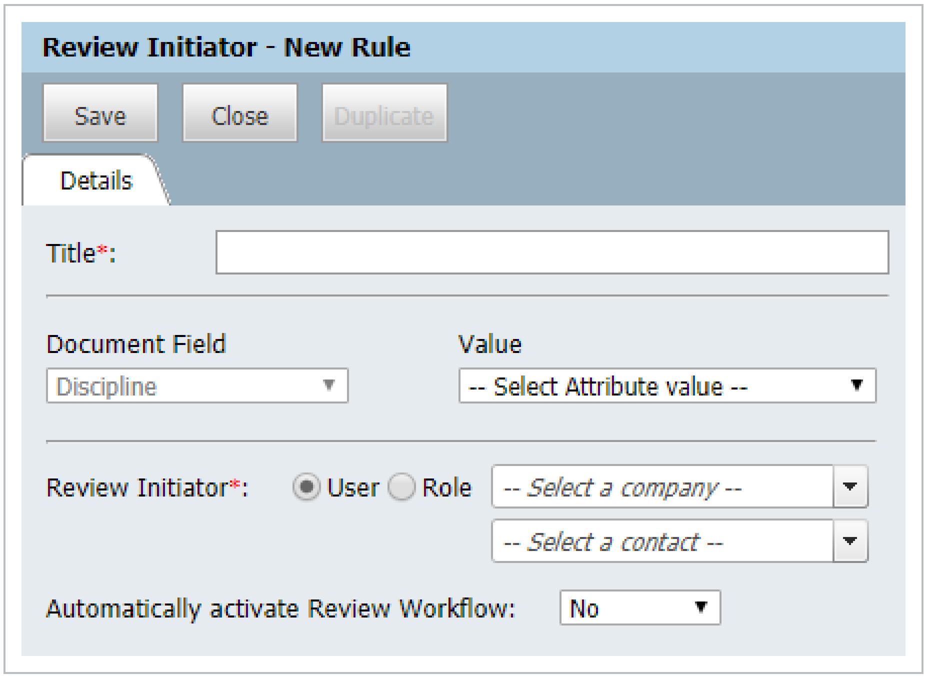
The **Review Initiator** is notified automatically by email after a restrained document is uploaded. Their role is to activate the workflow to a Review Team (if manual activation is required) based on a set of predefined Review Team Rules. These can be adjusted as required on a per document basis.

To define Review Initiators:

1. Click **Admin** then **Manage Document Rules**.
2. Select **Review Initiator** from the drop down list.



3. Click **New** and enter a **Title**.



4. Select the **Status** value.
5. Select the **Review Initiator** (company and contact or Role).
6. **Automatically Activate review** workflow:
   - **Yes** if the reviewers of documents with this Status should be notified automatically and the workflow is to be auto initiated.
   - **No** if only the Review Initiator is notified about restrained documents uploaded for review. The Review Initiator will manually activate the workflow and add/edit members from the defined Review team or changes the reviewer sequence for the document(s) if required before initiating the review process.
7. Click **Save** then **Close**.
8. Repeat steps above for additional review rules.

NOTE It is possible to define a default Review Initiator that will be used for restrained documents with a status where a review initiator has not been defined.

11.4 REVIEW TEAM RULES AND REVIEW SETTINGS

Review Teams in InEight Document are predefined either on a per Discipline or Free Form basis so when the workflow for a document is activated the system knows which reviewers and in what sequence to notify.

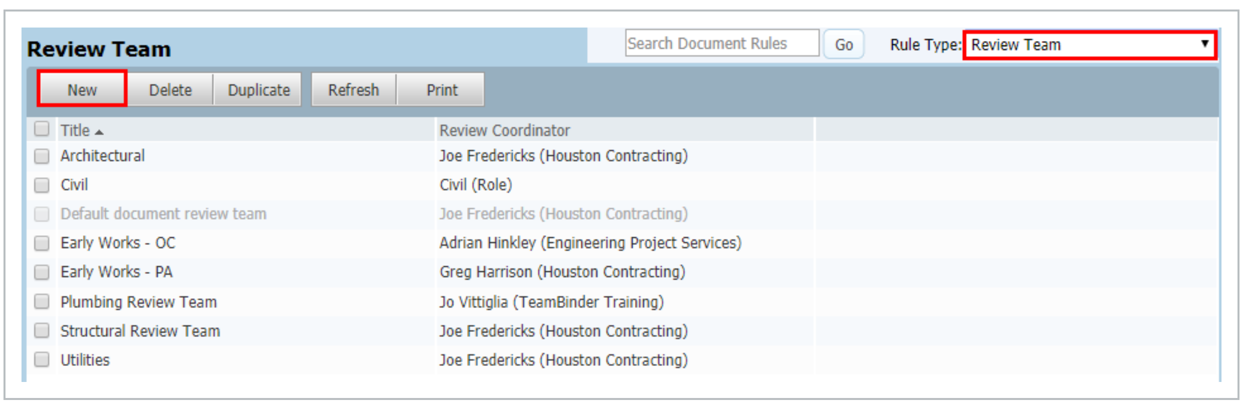
In addition to defining Review Teams the Document Review Coordinator is specified. This is the Company and contact responsible for managing the review process/workflow for restrained documents for each Review Team. The Review Coordinator is also responsible for consolidating the review comments and applying a review status once reviewers have completed their individual reviews.

There are three elements in relation to defining Review Teams and Review Settings:

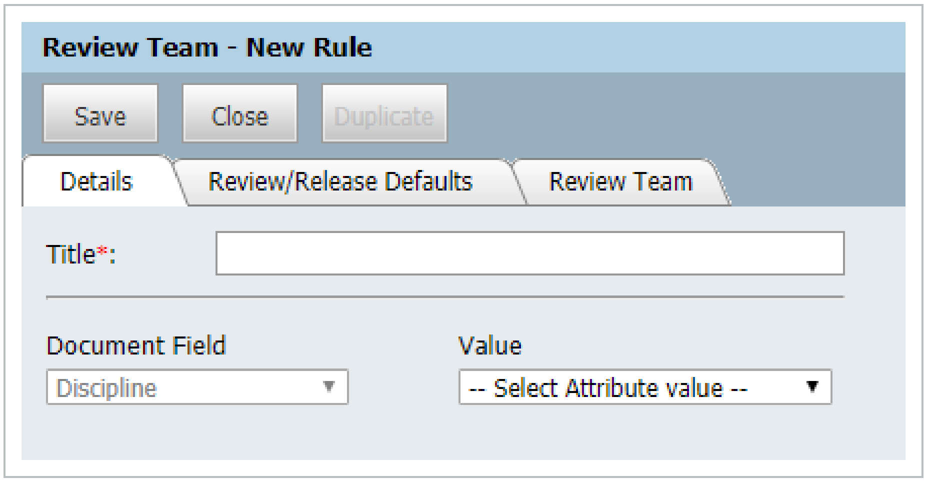
1. Define the Review Team Title and Discipline which controls which documents will be assigned to this team.
2. Define the Review and Release defaults for the Team.
3. Define the Review Team and Review Coordinator.

11.4.1 To Define a Review Team Title and Discipline

1. Click **Admin** then **Manage Document Rules**.
2. Select **Review Team** from the drop down list.



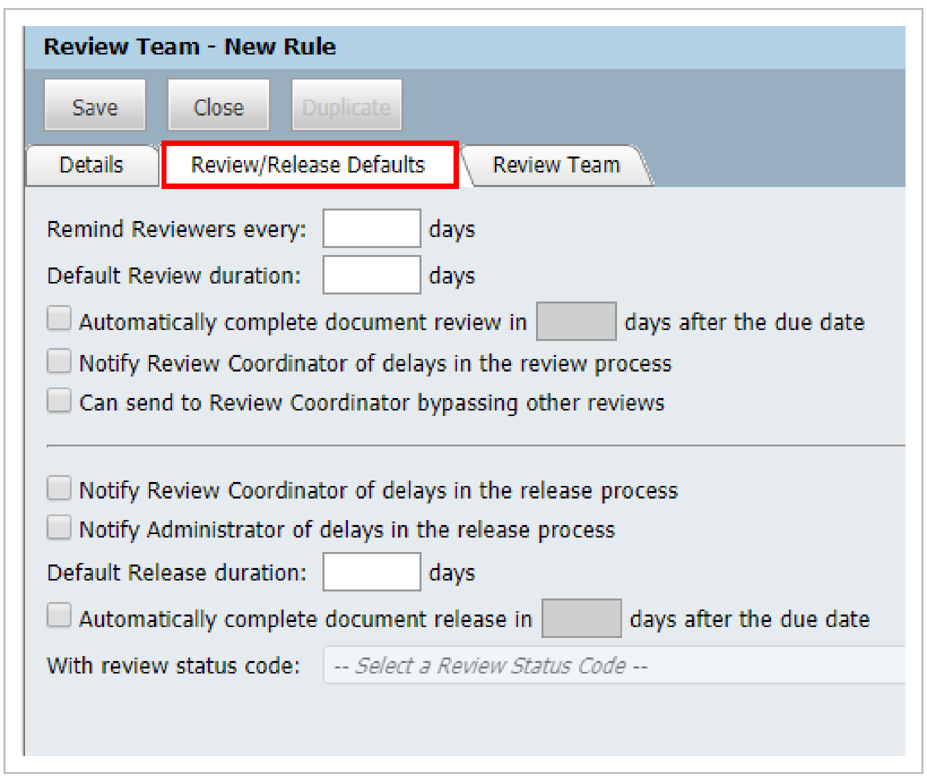
3. Click **New** and enter a **Title** for the Review Team.



4. Select the **Discipline** the Review Team is to be defined for.

11.4.2 To Define the Review/Release Defaults

1. From the Review Team window, go to the **Review/Release Defaults** tab.



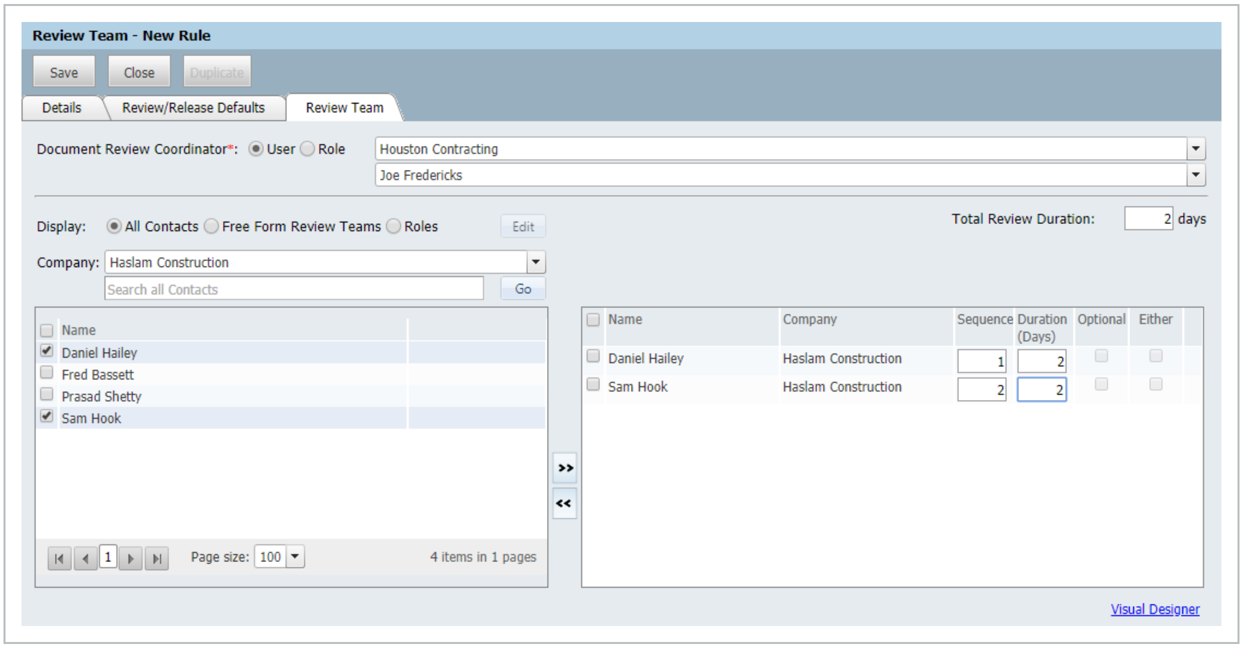
2. Enter values for the following controls in the screen provided:

- **Remind Reviewers Every** – Enter an Interval in days for the auto sending of reminders to reviewers if they have not completed their review by the due date.
- **Default Review Duration** – This is the default duration, in working days, for each user to complete their review. After this period, if the user has not completed their review, they will be notified that they are delaying the review process.
- **Automatically complete document review in X days after the due date** – This option can be enabled to have the system auto complete each reviewers review (with No Comment) if they do not complete their review prior to a defined number of days after their due date.
- **Notify Review Coordinator of delays in the review process** – Tick this box if the Review Coordinator wants to be notified by email of any delays to the review process (this is in addition to the standard notification sent to the individual reviewers).
  - **Can send to Review Coordinator bypassing other reviews** – This option is only available if 'Allow reviewers to bypass review' has been in enabled in Project Settings, Document. If available this option enables any Reviewer to complete the review process and send the document to the Review Coordinator. Reviewers who have not reviewed the document at that time will not be able to make any comments.
  - **Notify Review Coordinator of delays in the release process** – If there any delays to the release process the Review Coordinator will be notified by email.
  - **Notify Administrator of delays in the release process** – If there are any delays to the release process the Project Administrator will be notified by email.
  - **Default Release Duration** – This is the default duration allocated to release a document after all reviewers have completed their review. It is used as a trigger to control the notifications in regard to delays in the release process.
  - **Automatically complete document release in X days after the due date** – The system will auto release documents if the Review Coordinator has not released them prior to a defined number of days after the due date. Select the Review Status code to be assigned in the case of Automatic Release.

11.4.3 To Define the Review Team Members

A review team is a group of InEight Document users assigned the task of reviewing restrained controlled documents.

1. From the Review Team window go to the **Review Team** tab.



2. Specify the **Review Coordinator**, Company and Contract or **Role**.
3. Select the **Contacts**, **Free Form Review Team** or **Roles** to be included in the Review Team by moving them from the left pane to the right pane in the screen provided.
4. Enter the **Total Review Duration** in days for reviews to be completed.
5. Against each selected user (reviewer) enter the following attributes:
    - **Sequence** – This sequence determines the order in which each reviewer will receive the documents for review. Users with the lowest sequence will receive the document first. Once that user has completed their review, the person with the next lowest sequence will receive the document for review until all reviewers have completed their reviews. If using **Parallel** reviews, the sequence should be the same for each user, so all users receive the documents simultaneously.
    - **Duration** – This is the scheduled duration in days assigned to the reviewer to review documents. The combined total duration for all users should not exceed the Total Review Duration.
    - **Optional** – Only available where 2 or more reviewers are at the same sequence. Optional indicates that the reviewer is not required to complete a review before the reviewer next in sequence is notified. One reviewer must be mandatory in the sequence to enable others to be optional.

- **Either** – Indicates that if one of any of the reviewers ticked as 'Either' at the same sequence completes a review then the reviewer next in sequence will be notified. If other mandatory reviewers have not yet completed their review at the same sequence it will not move on. The use of 'Either' option requires at least 2 reviewers at the same sequence in a review team.

6. Click **Save** then **Close**.

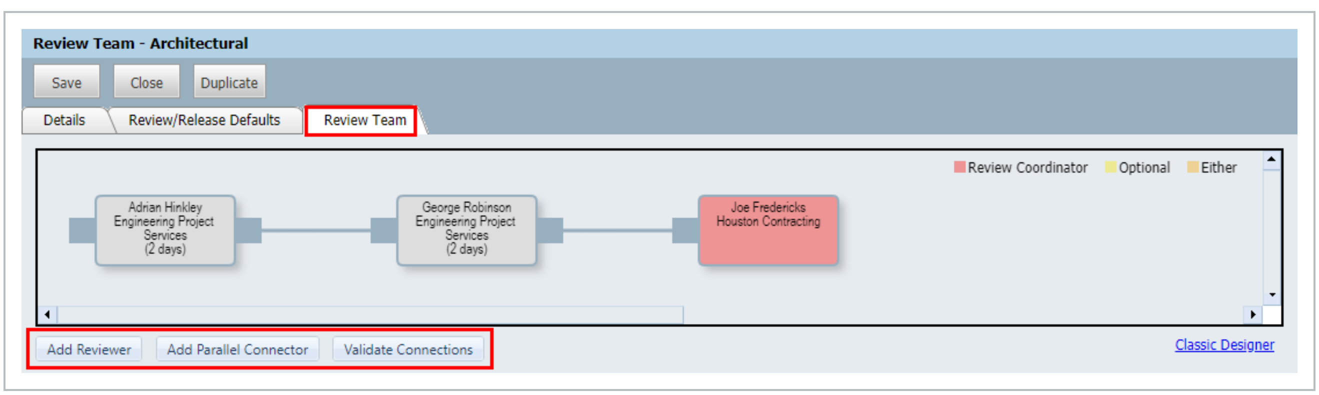
NOTE

- If no users are assigned to a review team the Workflow is considered as **Single** type and upon activation the document passes directly to the Review Coordinator for release.
- If a Review Coordinator is changed within a Review Team rule, the Project Administrator is prompted whether reviews in progress should be updated with the new Review Coordinator details or not.
- A default review team is setup with the Project Administrator as the Review Coordinator to cover where no review teams have yet been defined. This default review team can be modified by the Project Administrator.
- If using the **Roles** option people added to that role will all be defined as Either.

11.4.4 Using the Visual Designer

An alternative to defining review teams using the tabulated interface, define and/or edit review teams using a graphical user interface or Visual Designer.

From within the Review Team Tab, click on the V**isual Designer** link at bottom of the screen. If a review team has already been defined it will be displayed graphically.



To add new reviewers click and drag from the notes to the right or left of each existing reviewer box (if any) to draw new connecting lines. If a connecting line is drawn into an empty area it is assume that a new reviewer is to be added and the new reviewer window will appear where the reviewer details can be entered.

To edit an existing reviewer double click on the reviewer in the designer and edit details.

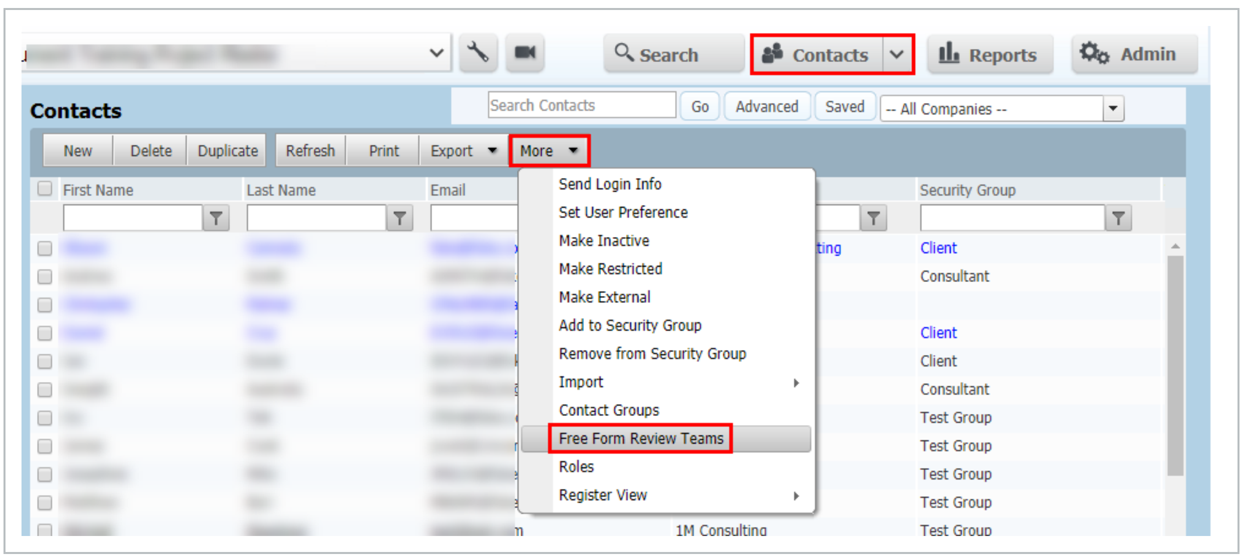
Use the buttons at the bottom of the designer window for **Add Reviewer**; **Add Parallel Connector**; and **Validate connections**. The Add Parallel Connector button is used when it is required to have more than one set of reviews in parallel directly following each other within the same workflow.

11.5 FREE FORM REVIEW TEAMS

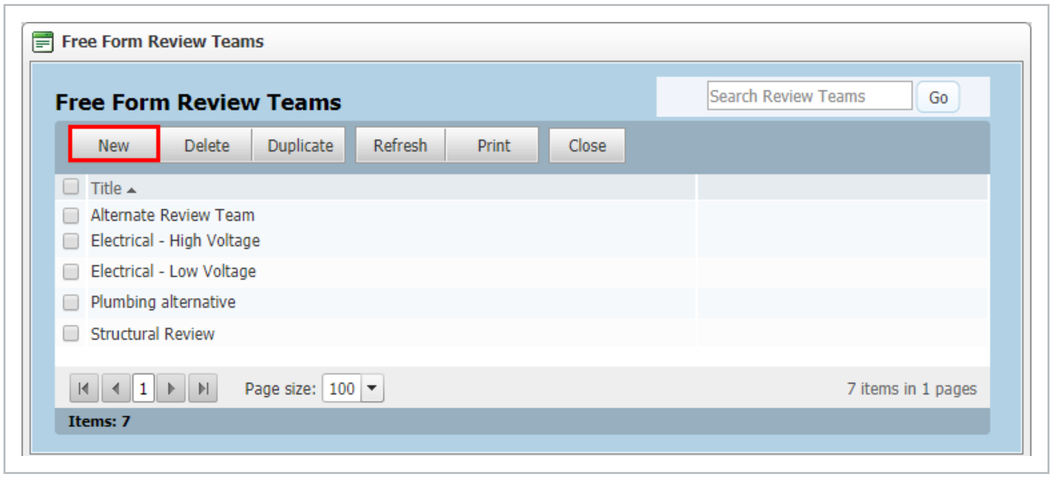
A Free Form review team is a pre-defined group of InEight Document users. Reviews by Free Form review teams must always be manually activated.

To define a Free Form based Review Team:

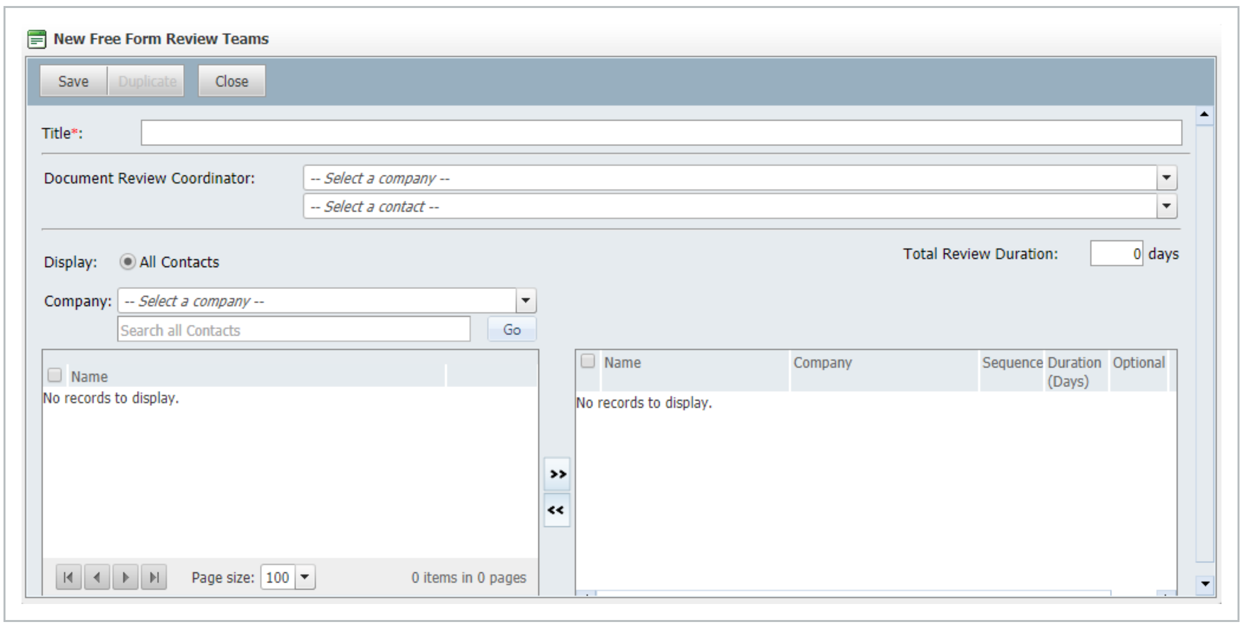
1. Click on **Contacts**.
2. Go to **More** and **Free Form Review Teams**.



3. Click **New** and enter a **Title** for the Review team.



4. Select the **Review Coordinator** details for the review team.



5. Select the **Contacts** to be included in the Review Team by moving them from the left pane to the right pane in the screen provided. Use the company drop down list to select the relevant company first.
6. Enter the **Total Duration** in days.
7. Against each selected user (reviewer) enter the following attributes:
   - Sequence
   - Duration
   - · Optional
   - Either

8. Click **Save** then **Close**.

CHAPTER 12 – PROJECT CREATION

12.1 PROJECT CREATION TOOL IN INEIGHT DOCUMENT

The InEight Document Project Creation Tool provides users with a powerful mechanism for creating their own projects within InEight Document.

Features of this tool include:

- Quick and simple way to create new projects based on existing projects.
- Wide variety of register default options available.
- Ability to transfer data from specified modules into new project including Configuration. Tables, Address Book information and Document Rules.
- Automatic selection of certain fields to ensure data integrity.

12.2 TERMINOLOGY

The following table describes each field found in the Project Creation Tool and its impact on the Project once created.

Field	Description
General	
Base Project No*	This drop down field provides a list of existing projects to choose from. Project-specific selections in the remainder of this form will then be updated based on the project selected, but can be manually updated as required.

Field	Description
Project No*	The Project No as it will appear in InEight Document. This is limited to 10 alpha-numeric characters. There must be no spaces and no special characters. The project number should not be in use by other existing projects.
Project Title*	The Project Title as it will appear in InEight Document. It is best if this is limited to no more than 50 characters.
Company*	The name of the host company as listed in InEight Document.
Time Zone*	Time zone of the host company.
Administrator*	This is the contact name of the Primary Administrator for the project as listed in InEight Document.
Contact Details	The details in the Contact Details fields will be populated with the same details already existing in the base project selected.

Field	Description
Custom	
Download Disclaimer	Enter a privacy message that will appear when users download documents from InEight Document.
Notification Interval	Select the Days, Hours, Minutes for the frequency with which the system will send email notifications relating to each event type in InEight Document. For example, if set to 30 minutes, then if 20 Documents are uploaded to InEight Document and these documents are released immediately, each recipient on the distribution matrix will receive one notification listing 20 documents rather than 20 notifications of one document each.
Document Download Expires in	The Document Download Expires in X Day(s) field is for use when sending email notifications to users to notify them of a new document. The value entered in this field will determine how long after the notification is created the users can download the document from that email notification.
Respond to Transmittals within	This is a default number of working days used to calculate the respond by date for transmittals based on the current date + number of days defined here.

Field	Description
Select Global Address Book	The project will be linked to the nominated Global Address Book.
User Password expires in	This is a number of days after which users will be required to change their password.
Enable TenderDocs5	Enables the TenderDocs5 feature
Enable Full Text Search	Enables content searches within mail attachments and document view files.
Select Customization to be Deployed	Use this option to select the base customisation template package to deploy if relevant.
Select Global Gallery Project	Indicates which base Global Gallery project to use. If not selected but option to enable Project Gallery is selected then the project itself will become the base Project Gallery project.

Field	Description
Mail & Doc Register Defaults	
Minimum Document Length*	The minimum Document Length accepted when validating document uploads.
Specify Drop Down Caption*	Select whether drop down captions appear as Code then Title (e.g. AR – Architecture) or Title then Code (e.g. Architecture – AR).
Send Document Comments to	Default settings for use when commenting on controlled documents from within the document register. The options are Originator, Review Coordinator, Recipients.
Enable Carry Forwarding	Used to set that outstanding comments against a document (not closed out) are automatically carried forward to the next revision of the document.

Field	Description
Enable Redlining and Commenting once the document has completed the review workflow	Used to enable the ongoing red-lining of and commenting against documents by users with access to them once the review workflow for them is completed.
Allow the Approver to upload a view file at the end of the approval	Enabling this feature allows the approver of a document workflow to upload a view file at the conclusion of a document review process.
Remove document access of the Primary Administrator	By default the Primary Administrator has access to all Documents Uploaded into the project, however, this feature can be disabled by selecting this option.
Enable document versioning	This allows documents to have both revisions and versions (e.g. A.01, A.02 etc)
Enable transmitted document access	Enables the option under company screen to give other users access to documents transmitted to their company.
Show checked out documents as latest documents	This removes the default option of checked out documents not shown as the latest.
Email In for Admin company	Specify the Email In address. This is an integrated email service for InEight Document which enables incoming emails sent to a standard email address to be routed directly into InEight Document and processed via Unregistered Mail.
Enable Vendor Data Module	This enables the Vendor Data Module.
Enable O&M Module	This enables the Operations & Manuals Module.
Enable Checklists Module	This enables the Checklists Module.
Enable Defects Module	This enables the Defects Module.
Enable Lots Module	This enables the Lots Module.
Enable Gallery Module	This enables the Gallery Module.
Use different Company Id prefix for Admin company	Enabling this feature allows the user to specify which Company Id prefix the Admin company will be known by. (Typically this is the Company Id).

Field	Description
in mail and transmittal numbering	
Module Transfer	
Set Support User as an additional Administrator	Add SUPPORT/QAS user as additional project administrator.

12.3 ACCESS TO THE PROJECT CREATION TOOL

To gain access to the New Project Creation Tool, contact your Project Administrator.

If your company would like access to this Tool, please contact your account manager.

12.4 CREATING A NEW PROJECT

1. Go to the URL provided by your Administrator and log in using the username and password provided (separate to your InEight Document credentials).
2. Select the base project you wish to use to pre-fill and populate the project-specific dropdowns in this form.
3. Fill in all required fields, taking note of all mandatory fields marked with an *.
4. Select Mail and Document Defaults (these can be updated from Project Settings once the project has been established in InEight Document if required).
5. Select the data you wish to export from the Base Project into the New Project.
6. Click **Finish** once complete, or **Clear** if you wish to start again. The form will then show whether the project is successfully created or if there are any errors.

NOTE	Greyed out fields cannot be changed based on existing selections (to ensure data integrity).

12.5 CHANGE PASSWORD

To change your Project Creation Tool password;

1. Click the **Change Password** button at the top right of the page.
2. Enter the existing password, followed by the New Password, then confirm the New Password.

3. Click **Save**.

12.6 ADDITIONAL PROJECT CREATION USERS

Access to the Project Creation Tool can be granted to additional project users by request. Contact InEight for more information..