ADMINISTRATION USER GUIDE

# DOCUMENT MANAGEMENT



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# CONTENTS

CHAPTER 1 — TASKS	7
1.1 Navigating Project Settings	7
1.2 Auto Numbering	15
CHAPTER 2 — DASHBOARD ADMINISTRATION SETTINGS	19
2.1 Project Description	19
2.2 Project Announcements	20
2.3 Useful contacts	21
CHAPTER 3 — CONTACT ADMINISTRATION	23
3.1 Contact Administration Overview	23
3.2 Creating Companies	24
3.2.1 Adding a Company Logo	30
3.2.2 Updating Logo Settings	30
3.3 Creating Company Types	31
3.4 Creating Departments	33
3.5 Creating External Contacts and Users	34
3.6 External Contacts	39
3.7 Creating a Security group	40
3.8 Configure Security Group Access by Type	42
3.9 Delegate Admin Functions for a Security Group	43
3.10 Adding Users to Security Groups in Bulk	45
3.11 Configure User Access to Modules	48
3.12 Restricted Users	49
3.13 Plain Text Email Notifications	50
3.14 Import Contacts from another InEight Document Project	51
3.15 Import Contacts from MS Excel	53
3.16 Contact Groups	55

3.16.1 To setup a Contact Group	55
3.16.2 To create a Smart Contact Group	58
3.17 Send Methods	59
3.18 Roles	60
3.19 User Audit Log	62
3.20 Marking a Contact as a Service Account	63
CHAPTER 4 — USING A GLOBAL ADDRESS BOOK	65
4.1 Overview	65
4.2 Getting Started with the Global Address Book	66
4.3 Populating the Global Address Book	66
4.4 Creating Contacts in a Linked Project	68
4.5 Maintaining the Global Address Book	69
CHAPTER 5 — MANAGING PROJECT ADMINISTRATORS	71
5.1 Updating the Project Administrator	71
5.2 Assign Company Administrators	72
CHAPTER 6 — CONFIGURATION TABLES	75
6.1 Accessing Configuration Tables	75
6.2 Revisions	77
6.3 Defining Mandatory Fields	79
6.4 Review Status Codes	80
6.5 Text Inputs	81
6.6 Document Attribute Extraction	82
6.7 Reasons	85
6.8 Responds Messages	85
6.9 File formats	86
6.10 Quick Links	87
6.11 Import Configuration Tables from MS Excel	88
CHAPTER 7 — ADDITIONAL ADMINISTRATIVE FUNCTIONS	91
7.1 Project Calendar	91
7.2 Customizing Register Views	92
7.3 Managing Saved Searches	94
7.4 Filing in Folders	95
7.4.1 To create a Folder structure	96
7.4.2 Using Smart Folders	
7.4.3 Using Dynamic Folders	
7.5 Project Archives	

CHAPTER 8 — MAIL ADMINISTRATION	105
8.1 Workflow	
8.1.1 Create a New Mail Workflow	
8.1.2 Add Mandatory Recipients:	
8.1.3 Edit Mail Workflow	
8.2 Custom Mail Footers	110
8.3 Integrated Email Service	112
CHAPTER 9 — DOCUMENT ADMINISTRATION	115
9.1 Rules for who can upload Documents	116
9.2 Distribution Rules	118
9.3 Change Document Access	
9.4 Restricted Documents	
9.5 Document # Masks	126
9.6 Access to a document	128
9.7 Processing Subscription Requests	129
9.8 Assigning Access to specific Documents	131
CHAPTER 10 — TRANSMITTAL ADMINISTRATION	
10.1 Configure Transmittal Workflow	
CHAPTER 11 — WORKFLOW ADMINISTRATION	139
11.1 Overview	139
11.2 Review (Y/N) Rules	
11.3 Review Initiator Rules	141
11.4 Review Team Rules and Review Settings	142
11.4.1 To Define a Review Team Title and Discipline	143
11.4.2 To Define the Review/Release Defaults	144
11.4.3 To Define the Review Team Members	
11.4.4 Using the Visual Designer	147
11.5 Free Form Review Teams	148
CHAPTER 12 — PROJECT CREATION	
12.1 Project Creation Tool in InEight Document	
12.2 Terminology	151
12.3 Access to the Project Creation Tool	155
12.4 Creating a New Project	155
12.5 Change Password	
12.6 Additional Project Creation Users	

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## CHAPTER 1 – TASKS

1.1 Navigating Project Settings	7
1.2 Auto Numbering	15

## **1.1 NAVIGATING PROJECT SETTINGS**

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

1. Click Project Settings.

REIGHT DOCUMENT RAISE TeamBinder	Need Help? V upport Hotline: 1800 727 102		Joe Fredericks Settings V Help V Logout
TRAINING501 - InEight Do	cument Training Project Master	~ 🔧 🛤	🔍 Search 🕹 Contacts 🗠 🏨 Reports 🖏 Admi
New Y	Dashboard		Refre
		2 ^	🗇 Transmittals 🔹 🕹
Dashboard	2 To Review	2 overdue	194 Total sent
	24 To Release	23 overdue	12 Total received
🖾 Mail	144 All overdue reviews		0 To review
Documents	26 All overdue releases		0 Returned from review
	34 Uploaded with overdue reviews		180 Sent with an acknowledgement pending
Transmittals	7 Uploaded with overdue releases		112         Sent with a response outstanding         112 overdue
👬 Packages	More		Personal 🔲 Company 🗐
🗟 Tasks	💌 Mail	2 ^	∲ My Statistics ¢ ✓
Published Reports	812 New mail     408 Inbox items awaiting response	303 overdue 406 overdue	► 812 New mail 303 overdue

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

General	General			
Disclaimers	Project No*:	TRAINING501		
Contact Details	Project Title*:	InEight Document Training Project Master		
Partners Miscellaneous	Project Header:	InEight Document Training Project Mast	er	
Miscellaneous	Project Manager:	Houston Contracting	▼ Joe Fredericks	•
Document	Project Director:	Houston Contracting	▼ John Smith	•
Packages	Time Zone:	(UTC+09:30) Adelaide		•
TenderDocs	Project Image:	Site Camera URL      Uploaded Image		
Forms Lots Gallery Defects uto Numbering	Remarks:	HCC-Logo-3.gif       Remove         Hide project image in dashboard         This project will transform, revitalise and renew public investment - both financial and communal - in Constructiontown's historic RSL Buildings and Grounds. In partnership with local Government, industry and the people of Constructiontown, a clear vision has been set, focusing on a balance between sustainable development and the traditional values held by returned service men and women.		
	Notification Interval User passwords exp Document review co	ire in 0 c days	es 0 🗘	

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 <b>one email</b> 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.</date>
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 <b>any</b> 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.

#### 1.1 Navigating Project Settings

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 <b>Document Release</b> process.
Enable redlining on restrained documents	Used to <b>disable</b> 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 <b>any</b> 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 <b>any</b> 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 <b>Notify</b> 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 ena TenderDocs	abled in	Select which modules should be enabled in the TenderDocs portal.						
Submission Origin	ator	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.						
•	There are to by InEight, p Allow mult than one file (e.g. 2.pdf f Carry forwa	Number cannot be changed after project creation. wo further Project Settings in relation to Documents that can be set only blease contact if these are of interest. These are: <b>iple files of same file extension for a single document</b> - enable more e with the same file extension to be uploaded against a single document iles). <b>ard document comments</b> –outstanding comments against a document out) are automatically carried forward to the next revision of the						

## **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.

General	Auto Numbe	ering			
Disclaimers Contact Details	Module	Trigger	Key Prefix	Display Format	Show Trigge
	Document	AUTO	[Discipline]-[Type]-	[Discipline]-[Type]-{###}	
Partners	Mail	AUTO	[FromCompID]-[FromID]-	[FromCompID]-[FromID]-{####}	
Miscellaneous	Package	AUTO	[OrigCompID]-[Type]	[OrigCompID]-[Type]{####}	
Mail	Transmittal	AUTO	[ProjectNo]	[ProjectNo]{######}	
Document Packages					

3. Click on the relevant module.

	Auto Numbe	ering			
Disclaimers Contact Details	Module	Trigger	Key Prefix	Display Format	Show Trigger
	Document	AUTO	[Discipline]-[Type]-	[Discipline]-[Type]-{###}	
Partners	Mail	AUTO	[FromCompID]-[FromID]-	[FromCompID]-[FromID]-{####}	
Miscellaneous	Package	AUTO	[OrigCompID]-[Type]	[OrigCompID]-[Type]{####}	
Mail	Transmittal	AUTO	[ProjectNo]	[ProjectNo]{######}	
Packages	E Auto I		Definition for Document		
TenderDocs					
TenderDocs Forms				Define	
	Display	Format			
Forms		Format		Define	

- 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	19
2.2 Project Announcements	20
2.3 Useful contacts	21

## 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.

General	General											
Disclaimers	Project No*:	TRAINING501										
Contact Details	Project Title*:	InEight Document Training Project	InEight Document Training Project Master									
Partners	Project Header:	InEight Document Training Project Master										
Miscellaneous	Project Manager:	Houston Contracting										
Mail												
Document	Project Director:	Houston Contracting		John Smith	•							
Packages	Time Zone:	(UTC+09:30) Adelaide			-							
TenderDocs	Project Image:	Site Camera URL  Uploade	Site Camera URL  Uploaded Image									
Forms		HCC-Logo-3.gif			Remove							
Lots		Hide project image in dashb	oard									
Gallery	Remarks:			public investment - both financial and	communal							
Defects		- in Constructiontown's historic RS	L Buildings an	d Grounds. In partnership with local G clear vision has been set, focusing on a	overnment,							
uto Numbering		between sustainable development		tional values held by returned service r								
		women.										
	Notification Interval	: Days 0 🗘 Hours 0 🗘 I	/linutes (	<b>) ‡</b>								
	User passwords exp	oire in 🛛 👔 🗘 days										
	Document review c	ut-off time: 12:00 AM										
		[]										

## 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**.

New An	nounce	ement																					
Subject :* Publish on		TeamBinder	r 📃 Te	nderDo	ocs									 									
nnouncem Arial		13px	•	A	9 - (	( <u>)</u>	B	I	ш,	< <sup>2</sup> X <sub>2</sub>	A	• 🖏	• 😫	*	۹,	T and a second	Ξ	Ω-	Ē	≣	=		ABC
																				ОК		Ca	ncel

## 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.

Primary Administrator	Technical Support	
Greg Harrison	P: 1800 727 102	
Project Administrator	E: <u>support@ineight.com</u>	
Houston Contracting	W: www.teambinder.com/wdexpress/help	
E: greg.harrison@houston.com		
P: 1800 727 102		
F: +61 3 9699 6293		
You are a Primary Administrator		

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

General	Integration with other systems
Disclaimers	
Contact Details	Filter
Partners	Within last 2 business days
Miscellaneous	Starting from 16-05-15
Mail	Others
Document	Allow company and user custom register views
Packages	Enable File attachments in 🛛 🗌 Mail 🗹 Transmittals 🗹 Packages
TenderDocs	Maximum size of attachments for mail / transmittal / package is 10 🗘 MB
Forms	Published Report caption :
Lots	
Gallery	Published Report abbreviation:
Defects	Display Folder items as : Title Only
Auto Numbering	Useful Contact Widget
	Project Administrator: Select a contact
	Useful Information:
	OK Cancel

# **CHAPTER 3 – CONTACT ADMINISTRATION**

3.1 Contact Administration Overview	23
3.2 Creating Companies	24
3.2.1 Adding a Company Logo	30
3.2.2 Updating Logo Settings	30
3.3 Creating Company Types	31
3.4 Creating Departments	33
3.5 Creating External Contacts and Users	34
3.6 External Contacts	39
3.7 Creating a Security group	40
3.8 Configure Security Group Access by Type	42
3.9 Delegate Admin Functions for a Security Group	43
3.10 Adding Users to Security Groups in Bulk	45
3.11 Configure User Access to Modules	48
3.12 Restricted Users	49
3.13 Plain Text Email Notifications	50
3.14 Import Contacts from another InEight Document Project	51
3.15 Import Contacts from MS Excel	53
3.16 Contact Groups	55
3.16.1 To setup a Contact Group	55
3.16.2 To create a Smart Contact Group	58
3.17 Send Methods	59
3.18 Roles	60
3.19 User Audit Log	62
3.20 Marking a Contact as a Service Account	63

## **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**

3.2.1 Adding a Company Logo 3	30
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3.2.2 Updating Logo Settings	0
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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.

PRANE	Support Hotline: 1800 7		Greg Harrison	Settings Y	Help Y Logout
RAINING502 - InEight D	ocument Training Project Master	~ <b>~</b>	Q Search	🗳 Contacts 🗸	L Reports Admin
New Y	Companies		Se	Companies Company Types	Advanced Saved
	New Delete Duplicate	Refresh Print	Export • More •		
Dashboard	Company 🔺	Type Phone	e Fax	Website	
Dasiibuaru	T	T	T	T	T
Mail	07-12-18SMC Contracting	CON			
	2M Consulting	CON			
Documents	Absolute Architecture	SC			
<b>A - - - - - - - - - -</b>	BAGAYAS	SC			
Transmittals	Brookland City Council	STK			
Packages	Brookland City Council	STK 555-8	814 555-0538		
II Fuckages	Built Environs	CON			
Tasks	City House Tower 1	SC			
	Complete Concrete-04-09	SC			
B Published Reports	Complete Concrete-14-08	SC			

- 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.

Save P	rint Clos	se	Upload Logo	- More			
Details O	otions	Document A	Access	Unreg Notification		Upload Rules	
Company ID*: [ Company*: [ Phone: [ Website: [ Address 1: [ Address 2: [				Type*: Business Reg Fax: Logo:	g. No.:	Select a Company Type	3. 🔻 4
City: Postcode:				State: Country:		Select a Country	
Trades: Departments:							
Email-in address:							
Fax-in number:							

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 Device of the prior of the
Provide users access	Document Register
to documents uploaded by their company	This option gives <b>access</b> to all users within a company to <b>all</b> 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	<b>Upload Logo</b> is used to upload your company logo for mail, reports, etc. Use the <b>Remove Logo</b> button to remove a previous uploaded logo and the <b>Customize Logo</b> button to customize the position of the logo on mail.

#### \*Mandatory fields

4. Save and Close when finished.

NOTE	• To delete companies click <b>Delete</b> , only if no contacts are set up for the company.
	<ul> <li>The Company ID can be changed by the Primary or Additional Project Administrators.</li> </ul>
	<ul> <li>Use More to: Duplicate a company; Make all Contacts in a company Active/In- Active; or Customize the layout of the register.</li> </ul>

• 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.

New Com	pany					
Save	Print	Close	Upload Lo	go 🚽	More 💌	
Details	Details Options Document Access Unreg Notification Upload Rules					

- 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.

Houston Contracting								
Save	Print	Close		Uplo	ad Logo	•	More	•
Details	Options	Docu	ument		Customis	-	0	
					Remove	Logo		

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

Logo size (In pixels):	Width 150 CHeight 61
Suggested logo size:	150 Pixels by 87 Pixels
Logo position:	Top Left
	Top Centre
	Top Right
Preview:	PROJECT01 - TexamiSinder Demonstration Project ABN den is and tompice
	LETTER
	Parf Net OKS 2001155 Date Sense Tes: Houry Jocobs, Houston Centration, Fax, FAXHJ Manage Japaneouthane, CA: Schware Pay, U.S. Fax (2), 84.46 A844 Man Paya Housens, Constanting Man Sense House, Houston Constanting House Joseph House, Houston Constanting House Joseph House, Housetting Constanting House Joseph House, Housetting Constanting
	France Cardina Child Children Right of Colling, Red. No.: France Cardina Children Right of Reg. Face Statepts mail collap.it: Respective regulated by:
	sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample mail subject Sample wail subject Sample mail subject Sample mail subject Sample mail subject
	Brougher med solgent Taropher med wolgent Staropher med wolgent Staropher med wolgent Staropher med solgent Staropher med wolgent Staropher med wolgent Staropher med wolgent Staropher med solgent in
	Junita Pains. QA Saftware Phy Ltd
	91. 2019 N. C. A.

- 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.
	<ul> <li>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.</li> </ul>

#### **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.

2M Consulting		
Save Prin	int Close Upload Logo 👻 More 💌	
Details Opt	tions Document Access Unreg Notification Up	load Rules
Company ID*:	2MC Type*:	Consultant
Company*:	2M Consulting Business Reg. No.:	
Phone:	Fax:	
Website:	Logo:	
Address 1:		
Address 2:	Company Type	
City:	Company Type*:	
Postcode:	Title*:	
	inde*.	
Trades:		
		OK Cancel

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

Company	Types		Search all Company Types				
New	Delete	Duplicate	Refresh	Print	Export		
Company	Туре 🔺		Title				
		T			T		
CLIENT			Client				
CON			Consultant				
EXT			External to Project				
GLOBAL D	ОМ	COBRA					
📄 Company	Туре						
Company Ty Title*:	уре*:						
			Ok	Can	cel		

#### 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.

Departments:	
Departmento.	
	_
	•
	_

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

ment Training Project M 🗸			~ ~		Q 9	earch	Contacts	~	
Contacts			s	Search Contacts			Go Advanced Saved All		
	New	Delete	Duplicate	Refresh	Print	Export	▼ More ▼		

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

D Not secure	www.teambin	der.com/Tear	nBinde	r199/AddressBook	/tbContactD	etail.aspx?In	tKey=0
lew Contact		Need Help?	~				
Save Print	Close	More 💌					
Details User :	Security C	istribution Mat	rix	Restricted Access	1		
Company:	Select a co	mpany first					-
Department:	Select a De	partment		Туре:			
irst Name*:				Last Name*:			
Contact ID*:							
ïtle:	Select a Tit	le		Position:			
hone:				Mobile:			
ax:							
imail*:						Update	Test
External Contact				Preferred Send Met	hod:	Email	
Address							
Address 1: Address 2:							
City:				State:			
ostcode:				Country:	Select a (	Country	-
Remarks:							
Other							
Make Inactive				Include Inactive	contact in filte	rs	
Make Restricted							

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

Field	Description
Туре	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 <b>Email, Fax</b> , and <b>HC</b> (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.

First Name*: Contact ID*:	
Title:	Select a Title
Phone:	
Fax:	
Email*:	
External Contact	

- 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.

Details	User Security	Distribution Matrix				
Security Gro	up:	Consultant				
Standard Ma	ail:	Personal 🔻				
Unregistered	d Mail:	Personal 🔻				
Folders:		None 🔻				
Document:		Full •				
Package:		Full •				
Transmittal:		Company 🔻				
Published Report:		None 🔻				
Tasks:		None 🔻				

- 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.

Details User Security Distribution Matrix Restricted Access					
Distribution Rules		Distribution Rules Assigned			
Title .		🔲 Title 🔺	PDF	DWG	DOC
Administration			✓		
Architectural		Civil			1
Civil					
Mechanical					
Plumbing	>>				
Project Management					
Structural (Man Review)	**				
Utilities					
◀ 1 ▶ ▶  Page size: 100 ▼					
14 items in 1 pages	;				
		•			

NOTE	<ul> <li>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.</li> </ul>
	<ul> <li>Contact IDs can be changed, if the user is not logged in, by editing the Contact Details and Save.</li> </ul>
	<ul> <li>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".</li> </ul>
	<ul> <li>When a contact is made inactive notifications are switched off, they are removed from listed document distribution rules and any assigned security group.</li> </ul>
	<ul> <li>If an in-active contact is made active again, you will be prompted to re-install previous access level.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>Use to delete a contact that has not made any transactions in any InEight Document Module and has been made inactive.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>Use Export, Excel and choose between All Items and Selected Items to export the current filter in the Contacts register.</li> </ul>

### **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.

First Name*:	
Contact ID*:	
Title:	Select a Title
Phone:	
Fax:	
Email*:	
External Contact	

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.



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.

ument Training Project Master 🛛 🗸 💌	Q Search	a Admin
Administration		
Manage User Access Define/Maintain user access and security	Configuration Tables Define/Maintain configuration tables	
Manage Document Rules Define/Maintain document workflow rules	Project Calendar Define/Maintain working days	

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

New Duplicate Delete Refresh	Print				
Security Group 🔺	Title	Description			
000	Open User				
ADMIN	Administrators	-	access to replace/de Administrators only	elete files	for
CEO	Owner				
CLIENT	Client				
CLIENTUSER	Client User Access				
Save Add Remove Refresh	Print Client				
Mail Type Access Transmittal Type Acce	ess Users Security				
Mail Type 🔺	Title	Read	Draft for Review	Send	Visibility
	Consultant Advice	<b>\$</b>			Compa
			4		Compa
CA	Commercial	4	•		
CA COCI	Commercial Design Instruction	<ul> <li>Image: A start of the start of</li></ul>	<ul> <li>Image: A start of the start of</li></ul>		Compa
CA COCI DI LC					Compa Compa

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.

Security Group*:	
Title*:	
Description:	
•	
Default User Secu	rity
Standard Mail:	Personal 🔻
Unregistered Mail:	None 🔻
Folders:	None 🔻
Document:	View •
Dealers	None 🔻
Package:	Company
Package: Transmittal:	Company 🔻
-	None

- 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.

Mail Type Access Transmittal Type Access Form Type Access Users Security					
Mail Type 🔺	Title	Read	Draft for Review	Send	Visibility
BASE1	Base 1				Company V
CA	Consultant Advice	-	se a la construcción de la const	-	Company 🔻
CAN	Contractor Notice Response	~		-	Company 🔻
CONF	Confidential Correspondence				Company •

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:

Туре	Description
Mail Type Access	<ul> <li>Read – gives the user access to view but not create mail of this type.</li> <li>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.</li> <li>Send – gives the user access to view, create and send mail of this type.</li> <li>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.</li> </ul>
Transmittal Type Access	<ul> <li>Read – gives the user access to view but not create transmittals of this type.</li> <li>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.</li> <li>Send – gives the user access to view, create and send transmittals of this type.</li> <li>Notes: <ul> <li>When a new security group is created, the Transmittal type access options are all un-ticked by default.</li> <li>Only users with Send Access to a transmittal type can Send/Resend/Cancel a transmittal of that type.</li> </ul> </li> </ul>
Form Type Access	<b>Read</b> – gives the user access to view but not create forms of this type. <b>Send</b> – 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.
- 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.

Save Add Remove Refresh Pri	nt Cl	ient	Administration
Mail Type Access Transmittal Type Access Description	Users	Security Available Values	Select a Module Administration Configuration Tables
Change Password	<b>a</b>	Personal	Document
Manage Document Rules			
Project Settings			

#### 3. The options include:

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

NOTE	<ul> <li>Users given permission for one or more of these functions can only apply the function to documents to which they have access.</li> </ul>
	• 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.
	<ul> <li>Security Levels are allocated to users via the Manage User Access screen, or from within the Address book using the User Security tab.</li> </ul>
	• 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).
	<ul> <li>Duplicate is used to create a new Security Group with similar mail type access, transmittal type access and form type access.</li> </ul>
	<ul> <li>In Contacts make the 'Security Group' visible by customizing the register to locate contacts who are not allocated to a Security Group.</li> </ul>
	<ul> <li>The options under Change Document Details contain standard Document fields. Custom fields can be added upon request.</li> </ul>

### 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.

ument Training Project Maste	er 🗸 🛰 🛤	Q Sea	arch 🍪 Contacts	<ul> <li>► п.</li> </ul>	eports 🎝 Admin
Administration					
Manage Use Define/Maintain user	er Access access and security	×	Configuration Tables Define/Maintain configuration tables		
Manage Doo Define/Maintain docu	cument Rules ument workflow rules	Tuesday 9	Project Calendar Define/Maintain working days		

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

	New Dupl	icate	Delete	Refresh	Print							
	Security Grou				1	Title			Description			
		<b>P A</b>				Open Us	er		Description			
	ABCD					ABCD						
						Administ	rators		Higher level files for depa only			
	CEO					Owner						
	CLIENT					Client						
	CLIENTUSER					Client Us	er Access					
	COB					City of B	rookland					
•	CONS					Consulta	nt					
-						company						
	Save Ad		Remove Transmit	Refresh	Print		Consultant		<i>A</i> //		_	
	Mail Type Acces		Transmit	Refresh tal Type Acc	ess	1	····	lail		ail Fold	ers	D
	Mail Type Acces	55	Transmit	tal Type Acc	ess	Users Name	Consultant Security	tail T	<i>A</i> // Unregistered Ma None		ers ate, View &	D
	Mail Type Acces	55	Transmit Firs And	tal Type Acc t Name	ess Last	Users Name h	Consultant Security Standard M		Unregistered Ma		ate, View &	D
	Mail Type Acces Company 1M Consulting	55	Transmit Firs And	tal Type Acc t Name drew ight	ess Last Smit	Users Name h ralia	Consultant Security Standard M Company	•	Unregistered Ma	▼ Cre	ate, View & ne	D
	Mail Type Acces Company 1M Consulting 1M Consulting	55	Transmiti Firs And Ine Nicl	tal Type Acc t Name drew ight	ess Last Smit Aust	Users Name th rralia gers	Consultant Security Standard M Company Personal	<b>T</b>	Unregistered Ma None Company	Cre  Nor	ate, View & ne ne	D • \ • [
	Mail Type Acces Company 1M Consulting 1M Consulting 1M Consulting	55	Transmit Firs And Ine Nici Pra	tal Type Acc It Name drew ight k	ess Last Smit Aust Rode Gun	Users Name th rralia gers	Consultant Security Standard M Company Personal Personal	T	Unregistered Ma None Company Personal	Cre  Nor  Nor  Nor	nate, View & ne ne	D • \ • F
	Mail Type Acces Company 1M Consulting 1M Consulting 1M Consulting 1M Consulting		Transmit Firs And Ine Nici Pra Sar	tal Type Acco It Name drew ight k bhakar	ess Last Smit Aust Rod Gun Gove	Users Name th ralia gers turi	Consultant Security Standard M Company Personal Personal Personal	T	Unregistered Ma None Company Personal None	Cre Nor Nor Nor Nor Nor Nor Nor	ne ne ne ne	D • \ •   •   •
	Mail Type Acces Company 1M Consulting 1M Consulting 1M Consulting 1M Consulting 1M Consulting	55	Transmit Firs And Ine Nici Pra Sar	tal Type Acco It Name Irew ight k bhakar anya anya	ess Last Smit Aust Rod Gun Gove	Users Name th ralia gers turi ender ender	Consultant Security Standard M Company Personal Personal Personal Personal	T	Unregistered Ma None Company Personal None None	Cre     Noi     Noi     Noi     Noi     Noi     Noi     Noi     Noi     Noi	ne ne ne ne ne ne	D • 1 • F • F • 7

- 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.

Security Group: Consultant		
Company: Haslam Construction	on 🔽	
Search all Contacts	Go	View Selected
🔲 First Name 🔺	Last Name	
Daniel	Hailey	
🔲 Fred	Bassett	
🔲 Prasad	Shetty	
🔲 Sam	Hook	
I    I  ► ►I Page	e size: 10 💌	4 items in 1 pages

- 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.

		-															ing Project Serv	ices
New Duplicate D	elete Refresh Print															EVGA EVGAWV	VCD	
Security Group 🔺		Title							De	scription						Fusion C		
000		Open User														Halikos		
ABCD		ABCD															Construction	
ADMIN		Administrators							Hiç	gher level a	iccess to replac	:e/delete fi	les for departmen	ıt Admin	istrators only	High Teo House of		
CEO		Owner															Contracting	
CLIENT		Client														HVK Ptv		
CLIENTUSER		Client User Access														IE		
COB		City of Brookland														InEight 1		
CONS		Consultant															sultancies	
EVGA		EVGA															sultancies IEAVY INDUSTR	IES
HCON		Head Contractor														Kat's Pla		
HCON-MI		Head Contractor - MI HOLDI	NGS													KGTEST		
HCON-PA		Head Contractor - PA															nstructions	
HCON-RES		Head Contractor - Restricted															ne Consultants	
HIGHS		High Security														Melbourn MI Holdi		
INT-OC		Interns SG OC															lumbing Service	c
M2ADMIN		Admins of M2														MRT Cor		-
DAEC		DVEC		_		_			_					_		P trainin		
Save Add Rer	nove Refresh Print	Consultant																
Mail Type Access 🔪 T	ansmittal Type Access	Users Security																
Company	First Name	Last Name	Standard Mai	(	Unregistered	Mail	Folders		Document		Package		Transmittal		Published Rep	port	Tasks	
Company	Andrew	Smith	Company	٣	None	٣	Create, Vie	w & 🔻	View	٣	None	٣	Company	۲	None	Ŧ	None	•
1M Consulting		Australia		•	Company	•	None	•	Full	•	Full	•	Company	•	None	•	None	
	Ineight	Ausulalia	Personal						Full	۲	Full	۲	Company	۲	None	Ŧ	None	•
1M Consulting	Ineight Nick	Rodgers	Personal Personal	۲	Personal	•	None								Allow a		None	
1M Consulting 1M Consulting	-			•	Personal None	•	None	•	View	•	None	۲	Company	•	None			
1M Consulting 1M Consulting 1M Consulting	Nick	Rodgers	Personal						View Full	•	None Full	•	Company	•	None	•	None	
1M Consulting 1M Consulting 1M Consulting 1M Consulting	Nick Prabhakar	Rodgers Gunturi	Personal Personal	•	None	•	None	۲								• •	None	÷
1M Consulting 1M Consulting 1M Consulting 1M Consulting 1M Consulting	Nick Prabhakar Saranya	Rodgers Gunturi Govender	Personal Personal Personal	•	None None	• •	None None	• •	Full	۲	Full	•	Company	۲	None			_
1M Consulting 1M Consulting 1M Consulting 1M Consulting 1M Consulting 1M Consulting	Nick Prabhakar Saranya Saranya	Rodgers Gunturi Govender Govender	Personal Personal Personal Personal	• •	None None None	* * *	None None None	* *	Full Full	• •	Full Full	• •	Company Company Company	• •	None None	٣	None	•
1 M Consulting 1 M Consulting 1 M Consulting 1 M Consulting 1 M Consulting 1 M Consulting 1 M Consulting	Nick Prabhakar Saranya Saranya Sonia	Rodgers Gunturi Govender Govender Graham	Personal Personal Personal Personal Personal	• •	None None None	• • •	None None None None	* * *	Full Full Full	• •	Full Full Full	• •	Company Company Company Company	• •	None None None	• •	None None	•
1 M Consulting 1 M Consulting	Nick Prabhakar Saranya Saranya Sonia Tony	Rodgers Gunturi Govender Govender Graham Rodgers	Personal Personal Personal Personal Personal	T T T T	None None None Personal	T T T	None None None None	* * *	Full Full Full	• • •	Full Full Full Full	* * *	Company Company Company Company Company	• • •	None None None None	* *	None None None	•
1 M Consulting         1 M Consulting	Nick Prabhakar Saranya Saranya Sonia Tony User	Rodgers Gunturi Govender Govender Graham Rodgers KH	Personal Personal Personal Personal Personal Personal	T T T T	None None None Personal None	T T T T	None None None None None	T T T T	Full Full Full Full Full	• • •	Full Full Full Full Full	* * *	Company Company Company Company	• • •	None None None None None	T T T	None None None None	• •

- 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	<ul> <li>None – not visible</li> <li>Personal – user is in the TO, CC, BCC or FROM values on the distribution</li> <li>Department – user of the same department is any of the TO, CC, BCC or FROM values on the distribution</li> <li>Company – anyone from the user's company is any of the TO, CC, BCC or FROM values</li> </ul>
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.

Passo P TeamBinder	Support I	Hotline: 1800 727 102			Joe	e Frede	ricks	Settings Y	Help Y	Logout
TRAINING501 - InEight D	ocumen	t Training Project M	aster		✓ <sup>3</sup> ■ Q:	Search	ľ	Contacts 🗸	L Reports	🗘 Admir
• New V	Con	itacts			Search Contacts	G	Adva	anced Saved All	Companies	<b>•</b>
		New Delete Duplic	ate Refresh Print	Export 💌 Mor	e 🔻					
Dealshand		First Name	Last Name	Email	Send Login Info			Security Group	Title	Ex
Dashboard		T	T		Set User Preference		T		T	T
🛛 Mail		Shawn	Cannata	fake@fake.co	Make Inactive	ting		Client		No
		Andrew	Smith	ASMITH@fak	Make Restricted			Consultant		Nc
Documents		Chritopher	Palmer	CPALMER@fa	Make External					Nc
	<b>e</b> (	Daniel	Cruz	DCRUZ@fake	Add to Security Group			Client		Nc
Transmittals			Doyle	IDOYLE2@fal	Remove from Security Group			Client		Nc
ž Davla za z		Ineight	Australia	IAUSTRALIA	Import	- F		Consultant		Nc
👖 Packages		Ivy	Teh	ITEH@fake.c	Contact Groups			Test Group		Nc
Tasks		James	Cook	jcook@1mcor	Free Form Review Teams			Test Group		Nc
L()		Josephine	Milio	JMILIO@fake	Roles			Test Group		Nc
B Published Reports		Matthew	Barr	MBARR@fake	Register View	- F		Test Group		Nc

- 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.

Company: Haslam Cons	struction	
🔲 First Name 🔺	Last Name	
Daniel	Hailey	
Fred	Bassett	
Prasad	Shetty	
Sam	Hook	
I I Page siz	re: 100 💌	4 items in 1 pages
Items Selected: 0		OK Cancel

- 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

Andrew Smith		Need Help? 🗸		
Save Print	Close N	lore 💌		
Details User S	ecurity Di	stribution Matrix	Restricted Access	
Company:	1M Consulting			•
Department:	Select a Dep	artment 👻	Туре:	CON
First Name*:	Andrew		Last Name*:	Smith
Contact ID*:	AS			
Title:	Select a Title	9 <b>•</b>	Position:	
Phone:			Mobile:	
Fax:				
Email*:	ASMITH@emai	l.com <mark>-text</mark>		Update Test
External Contact			Preferred Send Met	hod: Email 👻

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.

Con	itacts						Search Contacts	Go	Advance	ed	Saved	All Companies	
	New Delete	Duplicate	Refresh	Print	Export 💌 🚺	4ore	•						
- F	First Name	L	ast Name		Email		Send Login Info		5	Securit	ty Group		Title
		T		T			Set User Preference		T			T	
	Shawn	C	annata		fake@fake.co		Make Inactive	ting		Client			
	Andrew	S	mith		ASMITH@fak		Make Restricted		(	Consul	ltant		
	Chritopher	P	almer		CPALMER@fa		Make External						
	Daniel	c	ruz		DCRUZ@fake		Add to Security Group			Client			
	Ian	D	oyle		IDOYLE2@fal		Remove from Security Group		(	Client			
	Ineight	A	ustralia		IAUSTRALIA		Import 🕨		Companies	s From	Project		
	Ivy	Т	eh		ITEH@fake.co		Contact Groups		Contacts F	rom P	roject		
	James	C	ook		jcook@1mcor		Free Form Review Teams		Contacts F	rom E	xcel Shee	et	
	Josephine	Μ	ilio		JMILIO@fake		Roles		Download	Impor	t Contac	t Excel Sheet Templat	te
	Matthew	В	ərr		MBARR@fake		Register View	-		Test G	iroup		

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

Project:	Select a Project	-	
Company Type:	Select a Company Type	-	
Trade:	Select a Trade	•	
Company:	Select a company	•	
	Search all Contacts	Go	View Selected
First Name	Last Name		

- 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.

on	tacts			Search Contacts	Go	Advanced Saved All Companies	
N	lew Delete Duplica	ate Refresh Print	Export 💌 More	•			
Fi	irst Name	Last Name	Email	Send Login Info		Security Group	Title
Γ	T	T		Set User Preference		T	
S	hawn	Cannata	fake@fake.co	Make Inactive	ting	Client	
A	ndrew	Smith	ASMITH@fak	Make Restricted		Consultant	
c	hritopher	Palmer	CPALMER@fa	Make External			
D	aniel	Cruz	DCRUZ@fake	Add to Security Group		Client	
Ia	an	Doyle	IDOYLE2@fal	Remove from Security Group		Client	
I	neight	Australia	IAUSTRALIA	Import •		Companies From Project	
I	vy	Teh	ITEH@fake.co	Contact Groups		Contacts From Project	
Ja	ames	Cook	jcook@1mcor	Free Form Review Teams		Contacts From Excel Sheet	
J	osephine	Milio	JMILIO@fake	Roles		Download Import Contact Excel Sheet Template	е
M	latthew	Barr	MBARR@fake	Register View	-	Test Group	

- 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

File		_		te - Compatibility Mode	- Sav 🎾	O Search							
FIIE	Home	e Insert Page	Layout Formulas	Data Review	View Deve	eloper Help					B	🕆 Share 🖓	Comments
Pas Clip	te 🗳	B I <u>U</u> →   <u> </u> →		E = ≫ ~ th E = E = E = F Alignment 5	General \$ ~ % 9 €0 -00 Number	Conditional	ble ~	Elisert ×	√ Y Filt	rt & Find & er ~ Select ~	Ideas	Share This W File ~ Webex	ebex
6	~	: × × f											
				-	_								
4	A	В	С	D	E	F G	Н		J	K	L	M	
	ompanyID 🔹				Trade 🔻 Tra	deTitle 🔻 Deptid 🖪	DeptTitle 🔻	Contactid T				▼ Position ▼ A	ddress1
Ż		2M Consulting	CON	Consultant		ENG	Engineering	fjames			James	_	
		2M Consulting	CON	Consultant		ENG	Engineering	jwayne		Jane	Wayne		
			CON	Consultant		ENG	Engineering	awakely		Art	Wakely		
2	MC	2M Consulting											
2	MC	2M Consulting 2M Consulting	CON	Consultant		ENG	Engineering	mwatson		Miles	Watson		
22	MC					ENG	Engineering	mwatson		Miles			
2	MC					ENG	Engineering	mwatson		Miles			
2	MC					ENG	Engineering	mwatson		Miles			

- 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.

1 Ne	ew Rows Remove Rov	/S	Import Template	Validate	Download T	emplate							
	Company *		Company ID	Department		Department ID	Туре	Type Title	Trade	Trade ID	First Name *	Last Name *	Contact
×	2M Consulting	• •	2MC	Engineering	~	ENG	CON	Consultant	Select a Trade 🗸		Frank	James	fjames
⊠	2M Consulting	•	2MC	Engineering	~	ENG	CON	Consultant	Select a Trade 🗸		Jane	Wayne	jwayne
3	2M Consulting	•	2MC	Engineering	~	ENG	CON	Consultant	Select a Trade 🗸		Art	Wakely	awakely
3 🛛	2M Consulting	•	2MC	Engineering	~	ENG	CON	Consultant	Select a Trade 🗸		Miles	Watson	mwatso
<						_							,

- 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.

1 New Rows	Remove Rows Impo	ort Template Valida	e Download Templa	ate				
ddress 2	City	State	Postcode	Country	External Contact	Preferred Send Method	Remarks	Errors
					No V	Email		Company ID cannot be blank. Company cannot be blank. Company Type cannot be empty. Company Type title cannot be empty.

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

- 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	55
3.16.2 To create a Smart Contact Group	58

#### 3.16.1 To setup a Contact Group

1. From Contacts, More, select Contact Groups.

	New Delete D	uplicate Refresh	Print	Export 💌	More 🔻
		upileate Keirean	Fine	· ·	
	First Name	Last Name		Email	Send Login Info
		T	T		Set User Preference
	Shawn	Cannata		fake@fake.co	Make Inactive
	Andrew	Smith		ASMITH@fak	Make Restricted
	Chritopher	Palmer		CPALMER@fa	Make External
	Daniel	Cruz		DCRUZ@fake	Add to Security Group
	Ian	Dovle		IDOYLE2@fa	Bomovo from Cocurity Crown
	Ineight	Australia		IAUSTRALIA	Import
	Ivy	Teh		ITEH@fake.c	Contact Groups
	James	Cook		jcook@1mcoi	Free Form Review Teams
	Josephine	Milio		JMILIO@fake	e Roles
5	Matthew	Barr		MBARR@fake	Bogistor View

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

New Duplicate	Delete Refresh	h Print More 🔻 Close
Group ID 🔺	Title	Originator Type
	T	T
007	Minutes Conta	
ADV	Adventscape (	New Contact Group
CH-ARC-045	Package Grou	Save Close
CL-ELEC-00002	Package Grou	
CW	Package Grou	Group ID*:
DM	Design Meetir	Title*:
ELEC-0002	Package Grou	
ELEC-071019-JP	Package Grou	Smart Group (Automatically allocate contacts based on a filter criteria)
ELEC-071019-LZ	Package Grou	
ELEC-071019-MG	Package Grou	Make this group available to :      Myself
ELEC-JP-020619	Package Grou	Company
EVRYONE	Everyone	O Project
FW-01-0C	Package Group	

- 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.

ontact G	roups							Sea	arch all Contact Grou	ips G
New D	Duplicate	Delete	Refresh	Print	More 🔻	Close				
Group ID 🖌		Titl	е			Originator		Туре	Available To	Contacts
		T			T		T		-	
ADV		Adv	entscape Gr	oup		Joe Fredericks		Standard	Company	Add/Remove
CH-ARC-04	15	Pac	kage Group ·	- (CH-ARC-(	)45)	Joe Fredericks		Standard	Project	Add/Remove
CL-ELEC-0	0002	Pac	kage Group -	- (CL-ELEC-	00002)	Joe Fredericks		Standard	Project	Add/Remove
CW		Pac	kage Group -	- (CW)		Joe Fredericks		Standard	Project	Add/Remove

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

Individual contacts	Filter by company	•	Clear All			ОК		Cance
	Search all Contacts	Go	Distribution <ul> <li>To/Cc</li> <li>None</li> </ul>					
Name	Company		То	ТВ	Email	HC	Fax	
records to display.		>>	Adrian Hinkley (Engineering Project Services)	1	1			1
		~	George Robinson (Engineering Project	1		1		l
			Gina Joseph (Houston Contracting)	4				1
			John Smith (Houston Contracting)	1		1		
			Cc	ТВ	Email	HC	Fax	
			Fred Bassett (Haslam Construction)	4				
		>>	Sam Hook (Haslam Construction)	1				I

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

Individual contacts	Filter by company	-	Clear All		(	ЭК		Cancel
	Search all Contacts	Go	Distribution 🔘 To/Cc 💽 None					
Name	Company		Contacts	тв	Email	HC	Fax	
Io records to display.			Adrian Hinkley (Engineering Project Services)	4	1			×
			George Robinson (Engineering Project Services)	4		1		×
			Gina Joseph (Houston Contracting)	1				×
			John Smith (Houston Contracting)	1				×
			Fred Bassett (Haslam Construction)	1				×
			Sam Hook (Haslam Construction)					×

#### 8. Click **OK**.

- 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.

Prev Contact Group
Save Close
Group ID*:
Smart Group (Automatically allocate contacts based on a filter criteria)
Make this group available to :      Myself     Company     Project

- 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.

Save	Close		
Filter	Preview Filtered Contacts		
		All Contacts	
		All Users	
	Show:	External Contacts	
		Restricted Users	
		External Contacts not allocated to Security Groups	
	Security Group:	All	•
	Company Type:	All	•
	Trade:	All	•
	Company:	All	•
More sea	rch options >>		

4. Use the tab to check your filter settings.

Smart Contact Group	Filter - Minutes Contact(007)						
Save Close							
Filter Preview Filtered Contacts							
Name	Company	E-mail					
Josh King	QA Software Pty Ltd	dummy@qa-software.com					
Adrian Hinkley	Engineering Project Services	test@test.com					
Fred Bassett	Haslam Construction	abc@madeupaddress.com					
Frank Jacobs	Engineering Project Services	test@test.com					
Greg Harrison	Houston Contracting	greg.harrison@qa-software.com					
George Robinson	Engineering Project Services	test@test.com					

5. Click Save.

NOTE

<ul> <li>You cannot manu</li> </ul>	ally 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.

🔲 🔲 Individual contacts	Haslam Construction Search all Contacts Go	]	Clear All	OK Cancel
Name 🔺	Company		То	TB Email HC Fax
Daniel Hailey	Haslam Construction		Fred Bassett (Haslam Construction)	
Fred Bassett	Haslam Construction	>>		
Prasad Shetty	Haslam Construction	~~		
Sam Hook	Haslam Construction			

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

- 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.

- 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.

New Delete Duplica	ate Refresh Print	Export 💌 More	•
First Name	Last Name	Email	Send Login Info
T	T		Set User Preference
Shawn	Cannata	fake@fake.co	Make Inactive
Andrew	Smith	ASMITH@fak	Make Restricted
Chritopher	Palmer	CPALMER@fa	Make External
Daniel	Cruz	DCRUZ@fake	Add to Security Group
Ian	Doyle	IDOYLE2@fal	Remove from Security Group
Ineight	Australia	IAUSTRALIA	Import +
Ivy	Teh	ITEH@fake.c	Contact Groups
James	Cook	jcook@1mcor	Free Form Review Teams
Josephine	Milio	JMILIO@fake	Roles
Matthew	Barr	MBARR@fake	Register View

2. Use the Roles pane to add or delete roles

		TT ALL -		
-	Role ID 🔺	Title		
_	CIVIL	Civil		
	ELEC	Electrical		
-	Frankriger Project Considera		A defense 1 Berlinker	
	Engineering Project Services		Adrian Hinkley	
	Engineering Project Services		Frank Jacobs	

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

Display:	All Contacts (	Contact Groups		
Company:	Haslam Construct	ion	-	
	Search all Contacts		Go	View Selec
Compa	ny	First Name 🔺	Last N	lame
🔲 Haslam	Construction	Daniel	Hailey	/
🕑 Haslam	Construction	Fred	Basset	tt
🔲 Haslam	Construction	Prasad	Shetty	Y
🗌 Haslam	Construction	Sam	Hook	
	1 🕨 🕅 Pag	ge size: 100 💌		4 items in 1 pag

#### 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.

	1						
New Delete	Duplica	te Refresh	Print	Export 🔹	More 💌		
First Name		Last Name		Email			Company 🔺
	T		T			T	
Fred		Bassett		abc@madeu	upaddress.com		Haslam Construction
Prasad		Shetty		prasad@fak	e.com		Haslam Construction
Sam		Hook		dsc@madeu	ipaddress.com		Haslam Construction

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

Fred Basse	Fred Bassett			Nee	d He	elp? 🗸		
Save	Print	Close	M	ore	v			
Details	User Se	ecurity				cate Login Iı	nfo	e
Company:	(	Haslam Cons				lser Pref	ere	nce
Department:		Select a D	-	V	iew	History		
First Name*:	: [	Fred						Last Nar
Contact ID*:	[	FB						

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

Fred Bassett (	Haslam Construction	n) - History	Search History Go Contact
Refresh Print	Close		
Date	Event Type	Action By	Description
dd-mm-yyyy 🏢 🍸		· T	
24-07-19 02:47 PM	Assigned to Security Group	Joe Fredericks (Houston Contracting)	► More Information
26-06-19 04:45 PM	Assigned to Security Group	Joe Fredericks (Houston Contracting)	► <u>More Infomation</u>
29-03-19 01:28 PM	Assigned to Security Group	Joe Fredericks (Houston Contracting)	► <u>More Infomation</u>
29-03-19 12:52 PM	Assigned to Security Group	Joe Fredericks (Houston Contracting)	► <u>More Infomation</u>

#### **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).

Melissa Jones Save Print	Need Help? V		
Details User S	Security Distribution Matrix	Restricted Access	
Company:	Department of Planning		
Department:	Select a Department 🔻	Туре:	CLIENT
First Name*:	Melissa	Last Name*:	Jones
Contact ID*:	MJONES		
Title:	Select a Title 💌	Position:	
Phone:		Mobile:	
Fax:			
Email:			Update Test
External Contact		Preferred Send Metho	od: Email 💌
Address			
Address 1:			
Address 2:			
City:		State:	
Postcode:		Country:	Australia
Remarks:			
Other			
Make Inactive		Include Inactive of the second sec	contact in filters
	Visible only to the Primary Administrat	tor)	
_ connec Account (	risiole only to the rinnery Administration		

## • 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	65
4.2 Getting Started with the Global Address Book	66
4.3 Populating the Global Address Book	66
4.4 Creating Contacts in a Linked Project	68
4.5 Maintaining the Global Address Book	69

#### 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.

	QAS GAB - DEMO			~	*	🔍 Search 📑 Contact	s 🗸 🎚 Reports	Ø <sub>0</sub> Admir
Global Address	🗈 New 🗸	Contacts			Search Contacts	Go Advanced Saved	J – All Companies –	•
Book includes:		New Delet		Print More *				
	Dashboard	First Name	Last Name one	Email hemanthi@edmsvstems.biz	Phone 123456789	Company A ATO COMP PVT LTD		
	🖾 Mail	user .	two		123456789	AID COMP PVT LTD		
	sa Mai	Usermm	threeeee	u3@aio.com	123456789	AID COMP PVT LTD		
	Documents	user 📄	four	u4@aio.com	123456789	AIO COMP PVT LTD		
Address Book		E AA	AA			AID COMP PVT LTD		
Address book	Tasks	Test	User			AID COMP PVT LTD		
	3	📰 Amla	Wijesekara	amlawedms@sitnet.lk		Amila Company		
		Michael	Jones			Amila Company		
6		🗶 🔲 Paul	Smith			Amila Company		
Company		🗐 Dhusha	Perera	muldinux@gmail.com	234234234	Dinuwan Company - Edited2		
		Test	Ex	testex@tetetetetetet.com	234234234	Dinuwan Company - Edited2		
		Tes 📰	Ex	swedgsdg@ASSGDSZ.COM	234234234	Dinuwan Company - Edited2		
		Test	Đ3	asfagf@safasgfas.com	234234234	Dinuwan Company - Edited2		
Company Types		📰 Greg	Harrison	hemanthiedms@sltnet.k	1800 727 102	Houston Contracting		
company types		Additional	Administrator			Houston Contracting		
	-	Kenny	Thomas	KT@gmail.com		Houston Contracting		
		📰 John	Smith			Houston Contracting		
Departments		H ( 1 )	M Page size: 50	VTRami com		Haustan Pantoschina	2	6 items in 1 page
Departments		Items: 36	Page sze: 30	•			34	) items in 1 pag
•		atems 30						

- 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.

lew Company			
Save Print	Close Upload Logo 🚽	More 💌	
Details Ontions	Document Access	tification Unload Rules	
Select Projects			×
Select the linked p	roject where the company needs to	b be created.	
Project No	Project Title	Project No Project Title	
QASPROJ01	QAS - Test Project 01	No records to display.	
QASPROJ07	QAS - Test Project 07		
r			
•	•		
	▶ Page size: 5 ▼		
	2 items in 1 pages	4	•
1			
		OK Can	cel
ах ин польет.			

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

+ New	~	Contacts Search C	Contacts	Go Advanced	Saved All Companies
		New Delete Duplica	te Refresh Print	t Export 🔹	More -
Dashboard		Company 🔺	Company ID	Contact ID F	Send Login Info Set User Preference
🖾 Mail		ABC abc (Pvt) Ltd	ABC		Make Inactive Make Restricted
Documents		abc (Pvt) Ltd	W		Ac Make External P Add to Security Group
🏟 Transmittals		abc (Pvt) Ltd	W	vv v	/i Remove from Security Group
🔁 Tasks		ACC	ACC ACC1		CO Import
		ACC	ACC1 ACC1		Contact Groups Free Form Review Teams
		ACC	ACC	RT r	Poles

- 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.



#### 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.

New Cont	tact	Need Help? 🗸		
Save	Print Close 1	More 💌		
Details	User Security D	istribution Matrix 🕺 Res	tricted Access	
Company	Select Contact			
Departme First Nam	Book. Please select on	for the given contact hav e contact from this list if y t selecting any contact to		-
Contact I	Company	First Name	Last Name	
Contact 1	ACC	Jason	Jones	
Title:				
Remarks:				
Other			OK Can	:el
Make In	active		Include Inactive contact in filters	
	estricted			

- 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.

Contact	s	Search Conta	octs	Go Advanc	ed Saved ,
New	Delete	Duplicate	Refresh	Print Export	▼ More ▼
Compar	1Y 🔺	Ţ	Compan	y ID Contact ID	First Name
ABC			ABC	BBEAR	BROWN
Tea	Do you	u want to del	ete the contac Yes N	t from all linked pr	ojects?
ACC			ACC1	KBEAR	KOALA

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	71
5.2 Assign Company Administrators	72

### **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.

	Construction all Contacts	Go					
<ul><li>First Name </li><li>Fred</li></ul>	Last Name Bassett		🔲 First Name 🔺	Last Name	Company	Primary	All Doc Access
Sam Sam	Hook		Greg	Harrison	Houston Contracting	1	
			Joe	Fredericks	Houston Contracting		

- 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	<ul> <li>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.</li> </ul>
	<ul> <li>For additional Project Administrators, it is possible to control access to all documents using the <b>Doc Access</b> check box. By default, they do not get access.</li> </ul>
	• 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**.

_			Se	Companies		at must found		
o	mpanies		Se	Company Types		Advanced Saved		
	New Delete Duplicat	e Refresh	Print	Export 💌	More	•		
	Company 🔺	Туре		Phone	Fax	Website		
		T	T		T	T		
	07-12-18SMC Contracting	CON						
	1M Consulting	CON						
	2M Consulting	CON						
	4JP Consulting	CON						

- 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.

1M Consul	lting		
Save	Print	Close	Upload Logo 👻 More 💌
Details	Options	Docu	ment Access Unreg Notification Upload Rules
Company A	dministrato	or:	· · · · · · · · · · · · · · · · · · ·
Force users	s to file mai	il in folders	N Andrew Smith
Allow remo	ving allocat	ted mails fr	rom Daniel Cruz Ian Doyle

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

NOTE	<ul> <li>The company administrator will need to be notified by email outside of InEight Document of this change in status.</li> </ul>
	• 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.
	<ul> <li>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.</li> </ul>
	<ul> <li>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.</li> </ul>

# **CHAPTER 6 – CONFIGURATION TABLES**

6.1 Accessing Configuration Tables	75
6.2 Revisions	77
6.3 Defining Mandatory Fields	79
6.4 Review Status Codes	80
6.5 Text Inputs	81
6.6 Document Attribute Extraction	82
6.7 Reasons	85
6.8 Responds Messages	85
6.9 File formats	86
6.10 Quick Links	87
6.11 Import Configuration Tables from MS Excel	88

## **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.

Disciplines	Search a	all Disciplines	Go	All	▼ Disciplines	_
New Delete	e Duplicate Refree	sh Print Ex	port 💌 More	•	Areas Categories	
Discipline 🔺	Title				Comment Categories	
ADMIN	Administrati	on			Contract Numbers Disciplines	
ARCH	Architectura	I			Document File Name Format	
_	Civil	•			Folder Type	
CIV					Format Codes	
CP CP	Contracts &	Procurement			Gallery Status	
ELEC	Electrical				Locations	
ENV-OC	Environmen	tal			Mail Status Codes	
EW-OC	Early Works				Mandatory Fields	
FIRE	Fire				Quick Links	
					Reasons	
HYDR	Hydraulic				Resource Submission Status	
MECH	Mechanical				Resources Response Messages	
PLU	Plumbing				Review Status	
PM	Project Man	agement			Revisions	
STRU	Structural (1	Man Review)			Sites	
TEST	Test				Status Codes	
UTIL	Utilities				Task Status Codes	
	o cinci o o				Text Input	
					Titles Trades	
					Types	
					Units	

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

Revisions			Search all Revisions Go All					All   Revisions				
C	New	Delete	Duplicate	Refresh	Print	Export	•	More	•			
	Revision	Sec	juence 🔺 🛛 T	Title					Remarks			
	-		5 N	lo Revision								ŕ
	А		10 F	Revision A								
	В		11 F	Revision B								
	С		12 F	Revision C								
	D		13 F	Revision D								
	E		14 F	Revision E								
	F		16 F	Revision F								
	G		18 F	Revision G								
	н		20 F	Revision H								
	J		24 F	Revision J								
	К			Revision K								
	L		28 F	Revision L								
	М		30 F	Revision M								
	N		32 F	Revision N								
			36 F	Revision P								
	-		38 F	Revision Q								
			40 F	Revision R								
				Revision S								
				Revision T								
				Revision U								
				Revision V								
				Revision W								
				Revision X								
	Y		54 F	Revision Y								

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

#### 2. Click New.

3. Revision are populate with the following fields:

	G501 - New Revision
Save	Close
Revision*:	
Sequence*:	
Title*:	
Remarks:	
	Make Inactive Include Inactive codes in filters

- 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.
- 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.

Mandatory Fields			Search all N	landatory	/ Fields	Go	All	▼ Manda	atory Fields	
	New Delete	Duplicate	Refresh	Print	Export	<ul> <li>More</li> </ul>	•			
	Module 🔺	Туре		Field Na	ame	1	Mandatory			
	AdrBook			Compai	ny Id	١	ſes			
	AdrBook			Compai	ny	١	ſes			
	AdrBook			Id		١	/es			
	AdrBook			Title		I	No			
	AdrBook			First Na	ime	١	/es			
	AdrBook			Last Na	me	١	/es			
	AdrBook			Position	1	I	No			
	AdrBook			Phone		1	No			
	AdrBook			Mobile		I	No			
	AdrBook			Email		١	/es			
	AdrBook			Fax		I	No			
	AdrBook			Address	51	I	No			
	AdrBook			Address	5 2	1	No			

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.

	G501 - Edit Mandatory Field
Save	Close
Module: Field Name:	AdrBook
Mandatory:	
	]

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.

Re	view Status	Search all Review Status Go	All  Review Status
C	New Delete Dup	licate Refresh Print Export 🕶 Mo	ore 🗨
	Review Status 🔺	Title	Туре
	REJECTED	Rejected	Rejected
	RELEASED	Released	Released
	RELEASED-C	Released Subject to Comments	Released
	REV RES	Revise and Resubmit	Rejected

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

Save     Close       Review Status*:	TRAINING501 - New Review Status	
Type:  Released Rejected Title*:	Save Close	
Title*:	Review Status*:	
Make Inactive Include Inactive codes in filters	Title*:	
Make macuve Include macuve codes in milers	Make Inactive Include Inactive codes in filters	

- 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.

ext Input		Search all	Text Input		Go	All		-	Text Input		
New Delete	Duplicate	Refresh	Print	Export	<ul> <li>More</li> </ul>	*					
🗌 Text ID 🔺	Title										
TRAINING501	- New Text Ir	nput									
Save Clo	se										
Text Input*:											
Title*:											
Subject:											
Subject: Select Mail and/or	Transmittal typ	es :								•	
-	Transmittal typ	es :								▼ Plain Te	ext
Select Mail and/or	Transmittal typ		<b>19 • (</b> 2	• <b>B</b>	<u>и</u> х	<sup>2</sup> X <sub>2</sub> A	• (3) • (	2			ext
Select Mail and/or	• 13px	• #	<b>19</b> • (1	• <b>B</b>	г <u>ш</u> х	<sup>2</sup> X <sub>2</sub> A	• & • (	2	ŧ (),		ext
Select Mail and/or Standard Text :*	• 13px	• #	<b>1) -</b> (1	• <b>B</b>	<u>u</u> x	<sup>2</sup> X <sub>2</sub> A	• & • (	<b>≥</b> ≢	ŧ 🖏		ext
Select Mail and/or Standard Text :*	• 13px	• #	<b>₩) - (</b> ₩	• <b>B</b>	Υ <u>υ</u> ×	<sup>2</sup> X <sub>2</sub> A	• & • (	8. ∉	ŧ 🖏		ext
Select Mail and/or Standard Text :*	• 13px	• #	<b>19 - (</b> 1	• B J	r <u>u</u> x	<sup>2</sup> × A	• • •	<b>》</b> 译	<del>读</del> 🖏		ext
Select Mail and/or Standard Text :*	• 13px	• #	¥) • (*	• B 1	Т <u>Ш</u> х	<sup>2</sup> × A	• & • (	9. (F	ŧ 🎒		ext
Select Mail and/or Standard Text :*	• 13px	• #	<b>2) • (</b> 2	• B 2	K U X	<sup>2</sup> <b>x</b> <sub>2</sub> A	· • & • (	8	霁 🌒		ext

- 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:

POWERED PT TeamBinder		pport Hotline								_			
TRAINING01 - Trair	ning01 Pr	oject for Te	amBinde	er 🗸	*		Q Searc	h	Contacts	~	L Reports	Øo Ad	miı
+ New	~	Docume	nt File I	Na	Search a	l Docume	ent File Name I	Fc Go	Documents	•	Document File Na	ame Format	·
		New	Delete	Duplicate	Refresh	Print	Export 💌	More	•				
Dashboard		🔲 File Nam				Title				lue			
Dashboard	_	DOCFOR	MATDSGN			Docum	ient Format De	esign			mentNo>(?P <discipl ry&gt;.*)-(?P<type>.*</type></discipl 		
🖾 Mail											iceNo>.{3}))_(?P <r< td=""><td></td><td></td></r<>		
Documents													
🏟 Transmittals													
曽 Packages	<												
Defects													
🔁 Tasks													
B Published Report	rts												

1. From the Configuration tables select Document File Name Format

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

TRAINING01 - N	ew File Name Format
Save Close	
File Name Format*: Title*:	DOCFORMATDESIGN2
Value*:	(?P <documentno>(?P<discipline>.*)-(?P<category>.*)-(?P Make Inactive Include Inactive codes in filters</category></discipline></documentno>

- 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.

DocumentNo		:	$\times \checkmark f_x$	Document No	D*
nerccip	^	-		в	С
Path	45		Path	2	Document No*
<sup>–</sup> pfarea					
pflocation					
Reason		-			
receivedkiewit					
refno					
- Remarks		_			
Rev		-			
revised					
RevList					
RevNotes		-			
RevwithTitles					
cdn					

• 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**.

۲e	asons	Search all Reasons Go All	Reasons
C	New Delete	Duplicate Refresh Print Export	▼ More ▼
	Reason 🔺	Title	Sequence
	IAR	Issued As Requested	6
	IFC	Issued for Construction	30
	IFI	Issued for Information	10
	IFP	Issued for Printing	60
	IFQ	Issued for Quote	22
	IFR	Issued for Review	25
	IFT	Issued for Tender	20

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

	G501 - New Reason
Save	Close
Reason*: Title*:	
Sequence*:	
	Make Inactive Include Inactive codes in filters

- 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.

espons	e Messages	Search all Respo	nse Messages	Go All	<ul> <li>Response Messages</li> </ul>
New	Delete Duplicate	Refresh Print	Export 💌	More 💌	
Sequend	te 🔺 🛛 Title		Rema	rks	
	1 Your Approval is	Required By			
	2 Please respond b	у			
	3 Your Response is	s Required By			
	4 Please Sign and	Fax in your Commer	nts by		
	5 Printed Copies R	equired By			

2. Click the New button.

TRAINING501 - New Response Message
Save Close
Sequence*:
Remarks:
Make Inactive Include Inactive codes in filters

- 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**.

Format Code	S Search a	ll Format Codes	Go All	Format Codes	
New Delet	e Duplicate Refresh	Print Export	More 🔻		
Caption	Sequence 🔺				
PDF	1				
DWG	2				
DOC	3				
OTHER	4				

- 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.
- 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.

efresh Print Export 🔹	More 👻
	Import Configuration Data From Excel Sheet

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

1 New Rows Remov	e Rows Import Tem	plate Validate	Download Template	Areas	•	
Area		Area Title		Error		
records to display.						
ecords to display.						

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

File Hor	ne Insert Page Lay	yout Forr	mulas D	ata R	eview \	view De	veloper	Help							🖻 Shar	e 🖓 Con	nments
Paste 🗳	B I <u>U</u> ~   ⊞ ~	~ A^ A` <u>A</u> ~ [5		-	eb titi ∽	General \$~% Numt	9 ( 500 -000 ⊅0	Conditio		as Cell	Elinsert 👻 Delete 💉 Elis Cells	~ 🗸 ~	Sort & Filter ~ S Editing	Find & Select ~		hare This Web File * * Webex	Dex
9	• : × ✓ f <sub>x</sub>																
( A	В	С	D	E	F	G	н	1.1	J	K	L	M	N	0	Р	Q	R
Area	AreaTitle																
ALL	ALL Project Areas																
ATR	Atrium																
BSE	Basement																
CAR	Carpark																
CLUB	Clubhouse																
EXT	External Areas																

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

1 New Rows Remove Rows Import Temp	ate Validate Download Template	Areas 🔻	
Area	Area Title	Error	
MAIN	Main reception		
LVL10	Level 10		
LVL11	Level 11		
LVL12	Level 12		
LVL13	Level 13		
EXT	External Areas		

- 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.

1 New Rows Remove Rows In	nport Template Valio	late Download Template	Areas	•	
Area		Area Title		Error	
MAIN		Main reception		Area already exists.	
LVL10		Level 10			
) LVL11		Level 11			
LVL12		Level 12			
LVL13		Level 13			
EXT		External Areas		Area already exists.	

- 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	91
7.2 Customizing Register Views	92
7.3 Managing Saved Searches	94
7.4 Filing in Folders	95
7.4.1 To create a Folder structure	96
7.4.2 Using Smart Folders	98
7.4.3 Using Dynamic Folders	101
7.5 Project Archives	102

## 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**.



# • 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**.

Review	Release	Transfer	to 🔹	Refresh	Print	Export 📼	Transmit 🔻	More	•		
Rev	Disc	Sts	Sts Title			Batch Comment Compare					
•	•	-									
C	ARCH	IFC		Fire Saftey D	00	Create New Task					
C	ANOT	II C	Level 5	The Salley D	-	Subscribe					
Cu	istomise					Register View					
🗸 тв	TB5TR1 (Project View)					Change Docume	nt Details				

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.

Documents					
TB5TR1 (Project View)	✓ New Edit Restor	e Refresh	Print Close	Set view as 💌	
Field Name	Alternative Name	Visible	Column No 🔺 Colur	Project View	
Comments	Comments	Yes	1	Company View	
Checked Out	Checked Out	Yes	2	25	-
View Files	View Files	Yes	3	25	
Document No.	Document No.	Yes	4	197	
Revision	Rev	Yes	5	50	
Discipline	Disc	Yes	6	70	
Status	Sts	Yes	7	50	
Document Title	Title	Yes	8	193	
Category	Cat	Yes	9	70	
Туре	Туре	Yes	10	77	
Review Status	Review Status	Yes	11	172	_

- 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
	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.

ıbox			Search all I	nbox	Go	Adva	nced Saved	Personal
Reply 🔹	🔹 Reply All 💌 F	orward 🔻	Refresh	Print	Export 💌	More	*	
📕 Adva	nced Mail Search							
	Addresse	d To: 💽 Joe	e Fredericks				O Houston C	Contracting
		То:			-			-
	F	rom: All	Companies		•			•
	Date rece	ived: 🖲 Bet	ween 18-1	2-2011		And	16-10-2019	
		O Wit	thin the last		days			
	Responses reque	sted: 🖲 Bet	ween			And		
		⊖ Wit	thin the next		days			
	S	how: 🖲 All	Mail		O Nev	v Mail		Outstanding Mail
	Mail 1	ype: All	Mail Types					•
	Pri	ority: All						•
	Mail	Ref: Conta	ins	•				2
	Sub	ject: Conta	ins	•				2
	Mess	age: Conta	ins	•				2
	Attachn	nent: Conta	ins	~				2
	Attachment n	ame: Conta	ins	•				2
		Sh	ow Cancelled	Mail				
	More search optic Manage Sav		ar					Search Cancel

2. Select the saved search and Edit.

Edit	Delete	Refresh	Set as de	fault 💌	Print	Cancel		
🗌 Title		De	fault	Created		Last Modified	From	C
All Let	ters Received	<u>d by</u>		06-03-19	12:35 PM	06-03-19 12:35 PM	John Smith (Houston Contracting)	
Sub C	ontractor RFI	s		14-06-19	11:38 AM	14-06-19 11:38 AM	John Smith (Houston Contracting)	

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

Save Search Condition	×
Title*: All Letters Received by HCC	
Make this Search Conditions available to: 🔵 None	
My company	
My project	
Comments:	
Set as default filter for Myself My company My project OK	Cancel

- 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 dependent 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.

Folders	Standard	-	In	box										
InEight Docum	ent Training Project Maste	er		Reply 🔹	Re	ply All	•	Forward 💌	Refre	sh Print	Ð	kport 💌	More	•
	TY / PERMITS / NEIGHBOURS				j 💌	co (		From	T	Mail Ref	Ţ	Status		•
	T MANAGEMENT INFORMATI	N			-			John Smith		HCC-JS-02	08	OUTSTA	NDING	
DAILY RE	PORTS							John Smith		HCC-JS-02	07	OUTSTA		
🗉 🖴 FINANCIA								John Smith		HCC-JS-02		OUTSTA		
GHD Deis	gn Package							John Smith John Smith		HCC-JS-02 HCC-JS-02		OUTSTA		
DOCCUPAT	IONAL HEALTH & SAFETY							John Smith		HCC-JS-02		OUTSTA		
	MANAGEMENT				-			John Smith		HCC-JS-02	02	OUTSTA	NDING	
	& COMPLETION				-			John Smith		HCC-JS-02	01	OUTSTA	NDING	
	S							John Smith		HCC-JS-02		OUTSTA		
🗉 🚞 REPORTS								John Smith John Smith		HCC-JS-01 HCC-JS-01		OUTSTA		
SUBCONT	RACTORS RACTORS / SUPPLIERS	<				63		Shane Matt	hews	TCG-SM-00				
TRANSMI						c2		Shane Matthe	WS	TCG-SM-000	3.00	OUTSTA	NDING	
🛄 📴 UGL - Pro	ject A			Π		63		John Smith		HCC-3S-0008	8	OUTSTAI	NDING	

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.

Save Can	cel								
Details Filter Criteria									
Add Section to:	Add Section to: ADMINISTRATION								
Section ID *:									
Title*:									
Security*:	Private  Public								
Folder Type*:	Standard 🔻								
Smart Folder (/	Automatically allocate items based on a filter criteria)								

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.
	<ul> <li>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.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>Rename and delete folders using the right click options.</li> </ul>
	• There is no limit to the number of levels in the <b>Folder/Section</b> tree structure.
	<ul> <li>Custom fields can be added to the folder structure in addition to the ID and Title.</li> <li>Contact InEight for more information on this.</li> </ul>

### 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.

Edit Folder	
Save Car	ncel
Details Fi	Iter Criteria
Edit Folder:	LEGAL
Folder ID *:	Н
Title*:	LEGAL
Security*:	Private  Public
Folder Type*:	Standard 🔻
Smart Folder (	Automatically allocate items based on a filter criteria)

3. Click the Filter Criteria tab.

Edit Folder
Save Cancel
Details Filter Criteria
Mail Inbox
E Sent
Document
E Forms

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.

То	: Joe Fredericks :	· · · · · · · · · · · · · · · · · · ·	Houston Contracting
	:   All Mail	New Mail	Outstanding Mail
Mail Type	All Mail Types		•
Priority	: All		•
Mail Ref	Contains	•	2
Subject	Contains	•	2
Message	Contains	•	2
Attachment	Contains	v	2
Attachment name	Contains	•	2
	Show Cancelled M	ail	
ore search options >> Manage Clear			OK Cancel

### 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.

Available Fields	Assigned Fields	
Area		
Discipline		
Location		
Mail Thread Status	4	
Mail Type	44	
Status		
Make this Dynamic Folder View available	to  None  My company  My p	oroject
Set as Default Dynamic Folder view		

- 3. Repeat for the field required at the next level down within the Dynamic folder structure.
- 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.
- 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	105
8.1.1 Create a New Mail Workflow	
8.1.2 Add Mandatory Recipients:	108
8.1.3 Edit Mail Workflow	109
8.2 Custom Mail Footers	110
8.3 Integrated Email Service	112

### 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	106
8.1.2 Add Mandatory Recipients:	108
8.1.3 Edit Mail Workflow	109

### 8.1.1 Create a New Mail Workflow

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

Inbox				earch all Inbox	anced Saved 🔲 🔲 Personal	
Reply	/ •	Reply All	<ul> <li>Forward</li> </ul>	<ul> <li>Refresh Print</li> </ul>	nt Export 💌	More •
	•		From ! From	Mail Ref	Status	Download Attachments Duplicate Change Status to Export to
		-				Create New Task Register View Process Attachments as Controlled Documents
	 					Mark as Read Mark as Unread
						Generate Mail Hyperlink Generate Hyperlink for the current Register Define Mail Footers
		-				Configure Mail Workflow

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

	Mail Workflov						
New S	ave Delete	Refresh Print	Close				
Mail Type 🔺	Title		Mail Resp Days	Fwd Type	Reply Type	Mandatory Recipients	Enable File Attachments
CA	Consultant Advice		20	LETTER, MEMO	MEMO,LETTER	Add/Remove	•
COCI	Commercial		0	ANY	ANY	Add/Remove	•
DI	Design Instruction	1	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	<b></b>

3. Populate the following fields:

📰 New Mail Type		×
Save Close		
	o not show in New Mail menu when Replying / Forwarding the mail	Select
Allow users to modify the O Single Mail Reference Numb Default Response period:	rig. Ref No per with Response / Forward Counters	
Forward mail with Mail Types:		
Rooky to mail with Mail Times		•
Reply to mail with Mail Types:		•

- **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:

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

Configure Mail Workflow Search all Configure Mail Workflow Go								
New S	ave Delete Refresh Pri	nt Close						
🛛 Mail Type 🔺	Title	Mail Resp Fwd Days	Type Reply Type	Mandatory Recipients	Enable File Attachments			
CA	Consultant Advice	20 LET	TER,MEMO MEMO,LETTER	Add/Remove	•			
COCI	Commercial	0 ANY	ANY	Add/Remove	1			
DI	Design Instruction	0 ANY	ANY	Add/Remove	1			
LC	Local Council	0 ANY	ANY	Add/Remove	1			
LETTER	Letter	0 LET	TER LETTER,MEMO	Add/Remove	1			
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.
| Select Recipients      |                     |    |                        |                 | X) |
|------------------------|---------------------|----|------------------------|-----------------|----|
| Project Ocompany P     | ersonal             |    |                        |                 | •  |
| Individual contacts    | Filter by company   | •  | Clear All              | OK Cancel       |    |
|                        | Search all Contacts | Go |                        |                 |    |
| Name                   | Company             |    | То                     | TB Email HC Fax |    |
| No records to display. |                     |    | No records to display. |                 |    |
|                        |                     | >> |                        |                 |    |
|                        |                     | ** |                        |                 |    |
|                        |                     |    |                        |                 |    |
|                        |                     |    |                        |                 |    |
|                        |                     |    | Сс                     | TB Email HC Fax |    |
|                        |                     |    | No records to display. |                 |    |
|                        |                     | >> |                        |                 |    |
|                        |                     | ** |                        |                 |    |
|                        |                     |    |                        |                 |    |
|                        |                     |    |                        |                 |    |
|                        |                     |    | Bcc                    | TB Email HC Fax |    |
|                        |                     |    | No records to display. |                 |    |
|                        |                     | >> |                        |                 |    |
|                        |                     | ~~ |                        |                 |    |
|                        |                     |    |                        |                 | Ţ  |
|                        |                     |    |                        |                 |    |

- 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.

Edit Workflow of Commer	cial	×
Save Close		
Carry forward Orig. Ref No Allow users to modify the O	-	Select
Single Mail Reference Numb Default Response period:	per with Response / Forward Counters	
Forward mail with Mail Types:	ANY	•
Reply to mail with Mail Types:	ANY	•

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

NOTE	<ul> <li>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.</li> </ul>
	• To delete a mail type (that has not been used) select it then click <b>Delete</b> .
	<ul> <li>New mail types can be further customized if required by InEight.</li> </ul>

## 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:

- Search all Inbox Advanced Saved 🔲 🔲 Personal Go Inbox Reply 
  Reply All 
  Forward 
  Refresh Print Export 💌 More 💌 Download Attachments Mail Ref Status From Û. Duplicate -T T Change Status to Þ Export to Create New Task Register View Ŀ Process Attachments as Controlled Documents Mark as Read Mark as Unread Generate Mail Hyperlink Generate Hyperlink for the current Register Define Mail Footers Configure Mail Workflow
- 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.

New	Duplicate	Delete	Refresh	Print	Close
🗌 Title 🔺					
HCC Disc	laimer				

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

New Mail Footer Details	×
Save Close	
Title*:	
Footer:	
Make this footer available to all users from my company	

- 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.
- 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 Documents1169.2 Distribution Rules1189.3 Change Document Access1209.4 Restricted Documents1229.5 Document # Masks126

9.6 Access to a document	128
9.7 Processing Subscription Requests	129
9.8 Assigning Access to specific Documents	131

#### 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.

Jpload	Search Document Rules Go Rule Type: Upload
New Delete Duplicate Refr	h Print
🔲 Title 🔺	
Adventscape	
Consultants Upload Rule	
Early Works - OC	
ENDEC upload rule	
Environmental Rule - OC	

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

Save Close Duplicate Details Allocations itle*:			_
<ul> <li>Status</li> <li>Any</li> <li>Accepted for Construction</li> <li>As Built</li> <li>Issued for Approval</li> <li>Issued For Construction</li> <li>Issued for Information</li> <li>Issued for Review</li> <li>Issued for Tender</li> <li>Preliminary Design</li> <li>Return to Consultant</li> </ul>	Discipline Any Administration Architectural Civil Contracts & Procurement Early Works Electrical Environmental Fire Hydraulic Mechanical Plumbing Project Management Structural (Man Review) Test	Category Any All of Project Atrium Carpark Clubhouse External Areas General Ground Level Level 1 Level 2 Main Building	<ul> <li>Type</li> <li>Any</li> <li>Drawing</li> <li>Manual</li> <li>Photograph</li> <li>Register</li> <li>Report</li> <li>Schedule</li> <li>Shop Drawing</li> <li>Sketch</li> <li>Specification</li> </ul>

- 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.

Save Close Duplicate			
Selected Companies, Departments	s and Users	Add Companies Add Departments Add Users Remo	ve
Company	Department	Name	
No records to display.			

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.
- 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**.

Distribution	Search Document Rules Go Rule Type: Distribution
New Delete Duplicate Refres	h Print
Title 🔺	
Administration	
Architectural	
Civil	
Contracts & Procurement	
Early Works - OC	
Electrical	
Environmental Dist List- OC	
Fire	
Hydraulic	
Mechanical	
Plumbing	
Project Management	
Structural (Man Review)	
Utilities	

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

Distribution - New Rule	
Save Close Duplicate	
Details Distribution	
Title*:	
Document Field	Value
Discipline •	Select Attribute value
	Select Attribute value
	ADMIN - Administration
	ARCH - Architectural
	CIV - Civil CP - Contracts & Procurement
	ELEC - Electrical
	ENV-OC - Environmental
	EW-OC - Early Works
	FIRE - Fire
	HYDR - Hydraulic
	MECH - Mechanical
	PLU - Plumbing
	PM - Project Management
	STRU - Structural (Man Review)
	TEST - Test
	UTIL - Utilities

- 4. At the **Details** tab, select the Discipline.
- 5. Click on the **Distribution** tab.

Save Close Duplicate									
Details Distribution Company: Haslam Construction Search all Contacts	Go	_						_	
Name		Name	Company	PDF	DWG	DOC	OTHER	Access From	Notify
Daniel Hailey     Fred Bassett     Prasad Shetty		Daniel Hailey	Haslam Construction	Image: A start of the start	✓		<ul> <li>Image: A start of the start of</li></ul>	01-01-2000	
Sam Hook									
	2								
Id d 1 ► ► Page size: 100 ▼	in 1 pages								

- 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.
- 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.

ocume	ents		Search all Do	tuments	Go Advanced Sa	aved 🔲 🔲 🔲 Latest Unrestrained
New	Duplicate Download Bulk Up	load Review	v Release	Transfer	r to 🔻 Refresh Print	Export 💌 Transmit 💌 More 💌
) 📝 A	🖹 Document No. 🔺	Rev	Disc	Sts	Title	Batch Comment
		7	•	-		Compare
	ADMIN-DRAWING-001	A	ADMIN	IFI	Site Plan	Create New Task Subscribe
	ADV-EE-20190301-01-PA	с	ELEC	IFI	Single Line Diagram	Register View
	ADV-EE-20190306-01-PA	в	ELEC	IFI	Electrical Specification 607	Change Document Details
~	A-G-EL-0002	В	FIRE	PD	Front Elevation	Check-In Document
	A-G-EL-0003	А	ARCH	PD	Rear Elevation	Check-Out Document
	A-G-FP-0005	А	ARCH	PD	1st Floor Plan	Delete
	A-G-FP-0006	с	ARCH	IFT	2nd Floor Plan	Document Mask
	A-G-P-0001	с	ARCH	IFT	Site Plan	Assign Document Access Manage Document Access
	A-G-P-0002	А	ARCH	IFI	Roof Plan - East Quadrant	Replace/Remove View Files
	A-G-P-0009	В	ARCH	PD	Foundation Plan	Transfer Document Ownership
	A-G-S-0011	F	СР	AB	Section AA	Manage Document Workflow
	A-G-S-0012	в	ARCH	PD	Section BB	Manage Document Subscriptions
	A-G-S-0013	D	ARCH	PD	Section CC	Generate Document Hyperlink
	A-G-SCH-001	D	ARCH	IFT	Material Schedule 111	Generate Hyperlink for the current Registe Resubmit For Review
	A-G-SCH-002	D	ARCH	IFT	Material Schedule 2	Send Document for Signature
	A-G-SCH-003	с	ARCH	IFT	Material Schedule 3	Manage Stamp

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

required document + user combinations.

Save Refresh Print Clo	ose				
Document No. 🔺	Rev	Sts	Name	Access From	Stop Future Revision
A-G-EL-0002	В	PD	User 1 (InEight Training)	Document Subscription	
A-G-EL-0002	В	PD	James Cook (1M Consulting)	Document Subscription	
A-G-EL-0002	В	PD	User 1-190227 (Premiere)	Document Subscription	
A G EL 0002	В	PD	User 1 190228 (Premiere)	Document Subscription	
A-G-EL-0002	В	PD	User 2-190228 (Premiere)	Document Subscription	
A-G-EL-0002	В	PD	U 1-190301 (Premiere)	Document Subscription	
A-G-EL-0002	В	PD	User 190301-2 (Premiere)	Document Subscription	
A-G-EL-0002	В	PD	User 14 (InEight Training)	Granted Access/ Document Subscription	
I	-				

#### 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:

- Batch Comment co Compare Ŧ Create New Task m-C -0 Subscribe Register View WING 2-1 Change Document Details ORT -0 Check-In Document ED -2 Check-Out Document WING 2-1 Delete 2-0 Document Mask 2-0 Ľ Assign Document Access -2 C Manage Document Access Restricted Document Access -2 WING Replace/Remove View Files WING -1 Transfer Document Ownership
- 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**.

Register View: All			
All			
Status: All	•		
Discipline: EPC Document - EPC	•		
Type: Drawing - DRAWING	•		
Document No.: Contains		2	
Title: Contains		2	
Category: All	•		
Date Recorded:  Between And Within the last days			
Date Released:  Between And Within the last days			

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

Company	First Name	Last Name	
Contracting	Greg	and the second se	
			Save Cance

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

Display: Company:	All Contacts     Contra     Search all Contra		Go Advanced	View Selected
Compai	ny	First Name 🔺	Last Name	
	Contracting	Amir		
	Contracting	Amitav		
	Contracting	Client		
	Contracting	Department		
	Contracting	Dilshan		
	Contracting	Dilshan		
	Contracting	Dpartment		
<ul> <li>Image: A second s</li></ul>	Contracting	Greg		
	Contracting	InEight		
	Contracting	Joe		
	Contracting	John		
	Contracting	John		
	1 🕨 🕅 Pa	ge size: 37 💌		37 items in 1 pages

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

Users who have access to the rest	ricted documents		+ 11
Company	First Name	Last Name	
Contracting	Greg		
			Save Cancel

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.

Docume	t Number Mask:					
N	A #	X	-	Other	Clear	
					Add	
Docume	it Mask List:					
					Move Up	
					·• Move Down	
					× Delete	
🕑 Docui	nent Number length	should be same	as the doo	ument mask		
Charater	defined by the doci	ument mask(s)				
	a or Numeric charac	· · · · · · · · · · · · · · · · · · ·				
	a characters only (A- ieric characters only	· ·				
	Alpha or Numeric ch	• •	an			
(space, o	omma, /,  <, >, :,	*, ?, ",  )				
	Other" ention to def	ino statis sharast	ers if requ	irad Thaca w	ill appear in blue.	

- 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	<ul> <li>To control the length of document numbers. Tick the box labelled Document Number length should be the same as the document mask.</li> </ul>
	<ul> <li>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 <b>Other</b> button.</li> </ul>
	• A series of alternative masks can be used on a project. Documents uploaded must conform to one of the masks in use.
	<ul> <li>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.</li> </ul>
	<ul> <li>Click the <b>Remove</b> button to remove a mask from the system.</li> </ul>
	<ul> <li>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.</li> </ul>

## 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.

Users who ha	ve access	s to the document						Document No.:         A-G-P-000           Rev:         C           Sts:         IFT
Print Close								
Name 🔺		Company		Formats	Last Access Granted	Last Downloaded	Access From	Details
	T		T		T dd-mm- 🎹 T	dd-mm- 🎟 🍸	T	
				PDF	25-03-13			Pkg No: ELEC-TR-001 Title: Electrical Package Trm No: HCC-000042 Reason: Issued As Requeste Dated: 19-10-12
				PDF	25-03-13			Pkg No: ELEC-TR-001 Title: Electrical Package Trm No: HCC-000042 Reason: Issued As Requeste Dated: 19-10-12
				PDF	17-01-19		Discipline Matrix	
				PDF	19-10-12		Transmittal	Trm No: HCC-000042 Reason: Issued As Requeste Dated: 19-10-12
				PDF	01-02-13			No longer has access as the inactive
				PDF	19-03-19		Discipline Matrix	

- 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.

Approve Reject Refre	sh Commer	nts Pri	nt Close						
Document No. 🔺	Rev	Sts	Title	Subscriber	Requested On	PDF	DWG	DOC	OTHER
	<b>T</b>	•	1	7	T dd-mm-yyyy	T			
A-G-S-0013	в	PD	Section CC	Andy Bogard (Advent	scape) 01-03-19				
A-G-S-0013	в	PD	Section CC	User 190301-2 (Prem	iere) 01-03-19				
C-ENV-002	D	IFI	Environmental 2 - oc	U 1-190301 (Premier	e) 04-03-19				

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.
	<ul> <li>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.</li> </ul>
	<ul> <li>To see previously approved subscription requests, click the View Approved Subscriptions option group button at the top right of the screen.</li> </ul>

- 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.

lect one or	more users to grant document acc	cess					
Contacts	Documents						
Company:	Select a company	-	]				
	Search all Contacts	Go					
First N	lame 🔺 🛛 Last Name		]	📃 First Name 🔺	Last Name	Company	
No records	to display.			No records to display.			
No records	to display.		>> <<	No records to display.			
No records		0 items in 0 pages		No records to display.			

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

Disc Cat	PDF [	DWG DOC	OTHER
ARCH CLUB	3		

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

## **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.

<ul> <li>New Y</li> <li>Dashboard</li> </ul>	Inbox Reply  Reply All  Forward  Refr	Search all Inb	
Dashboard		esh Print Export 💌 More	
Dashboard			e 💌
	Transmittal No.	Received - dd-mm-yyyy IIII T	Duplicate without recipients Duplicate with recipients
🖾 Mail	TRAINING501000258     TRAINING501000223	02-10-19 05:31 AM 19-09-19 07:29 AM	Mark as Read Mark as Unread
Documents	TRAINING501000152	13-08-19 05:00 AM	Create New Task Register View
💠 Transmittals	TRAINING501000151	13-08-19 04:59 AM	Configure Transmittal Workflow
Inbox	TRAINING501000109	02-08-19 09:24 AM	Generate Hyperlink for the current Register
Drafts	TRAINING501000001	14-06-19 08:44 AM	Transmittal this!!
Sent Items	HCC-000285	11-06-19 02:25 PM TES	ST_PACKAGE Notification of Invita

2. Double click the Transmittal type to open.

Refresh Pri	nt Close		
Fransmittal Type	Title	Reply Type	Mandatory Recipients
General/Revised	Latest Released Documents/Revised Documents	ANY	Add/Remove
Rejected	Rejected Documents	ANY	Add/Remove
Restrained	Under Review Documents	ANY	Add/Remove
Superceded	Superseded Documents	ANY	Add/Remove

Edit Workflow of Latest Release	ed Documents/Revised Documents	×
Save Close		
Reply to transmittal with Mail Types:	ANY	•

- 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.

Select Recipients					
● Project ◯ Company ◯ F	Personal				
Individual contacts	Filter by company	-	Clear All	ОК	Cancel
	Search all Contacts	Go			
-					
Name No records to display.	Company		То		
		>	» «		
			Cc		
			No records to display.		

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# CHAPTER 11 – WORKFLOW ADMINISTRATION

11.1 Overview	. 139
11.2 Review (Y/N) Rules	140
11.3 Review Initiator Rules	. 141
11.4 Review Team Rules and Review Settings	. 142
11.4.1 To Define a Review Team Title and Discipline	. 143
11.4.2 To Define the Review/Release Defaults	144
11.4.3 To Define the Review Team Members	. 145
11.4.4 Using the Visual Designer	. 147
11.5 Free Form Review Teams	148

## **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.

ГΕ	<ul> <li>If required reviewers can create sub review workflows initiating a workflow within</li> </ul>
	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.

NO

## 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.

Review (Y/N)		Search Document Rules Go Rule Type: Review (Y/N)		Rule Type: Review (Y/N)
New Delete Duplicate Refresh	Print			
Title 🔺	Restrained			
As Built Documents (AB)	Yes			
Documents Issued For Construction (IFC)	Yes			
Documents Issued For Information (IFI)	No			
Documents Issued For Review (IFR)	Yes			
Documents Issued For Tender (IFT)	Yes			
Issued for Approval	No			
Preliminary Design Documents (PD)	No			
Review not required	No			

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

Review (Y/N) - New Rule	
Save Close Duplica	ate
Details	
Title*:	
Document Field	Value
Sts 🔻	Select Attribute value 🔻
Review Required:	No

- 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.

Review Initiator	Search Document Ru	ules Go Rule Type: Review Initiator
New Delete Duplicate Refi	resh Print	
Title 🔺	Review Initiator	Auto Activate Review Workflow
Administration Initiator	Greg Harrison (Houston Contracting)	No
Architectural Initiator	Joe Fredericks (Houston Contracting)	Yes
Civil Initiator	Joe Fredericks (Houston Contracting)	No
Contracts & Procurement Initiator	Joe Fredericks (Houston Contracting)	No
Default – Review Initiator	Greg Harrison (Houston Contracting)	No

3. Click New and enter a Title.

Review In	itiator - New Rule	2	
Save	Close	ate	
Details			
Title*:			
Document F	Field	Value	
Discipline		Select Attribute value	۲
Review Initi	iator*: 💿 User 🤇	Role Select a company	•
		Select a contact	-
Automatical	lly activate Review	Workflow: No 🔻	

- 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	. 143
11.4.2 To Define the Review/Release Defaults	. 144
11.4.3 To Define the Review Team Members	. 145
11.4.4 Using the Visual Designer	. 147

#### 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.

leview Team	Search Document Rules	Go Rule Type: Review Team
New Delete Duplicate Refresh	Print	
Title 🔺	Review Coordinator	
Architectural	Joe Fredericks (Houston Contracting)	
Civil	Civil (Role)	
Default document review team	Joe Fredericks (Houston Contracting)	
Early Works - OC	Adrian Hinkley (Engineering Project Services)	
Early Works - PA	Greg Harrison (Houston Contracting)	
Plumbing Review Team	Jo Vittiglia (TeamBinder Training)	
Structural Review Team	Joe Fredericks (Houston Contracting)	
Utilities	Joe Fredericks (Houston Contracting)	

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

Review Te	nm - New Rule
Save	Close Duplicate
Details	Review/Release Defaults Review Team
Title*:	
Document F	ield Value
Discipline	<ul> <li>Select Attribute value</li> </ul>

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.

Review Te	am - New Rule	
Save	Close Duplicate	
Details	Review/Release Defaults Review Team	
Remind Re	viewers every: days	
Default Rev	view duration: days	
Automa	tically complete document review in days after the due date	
Notify R	eview Coordinator of delays in the review process	
📃 Can sen	d to Review Coordinator bypassing other reviews	
	eview Coordinator of delays in the release process dministrator of delays in the release process	
Default Rel	ease duration: days	
📃 Automa	tically complete document release in days after the due date	9
With review	v status code: Select a Review Status Code	

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.

Save Close Duplicate Details Review/Release Defaults Review Te	am				
ocument Review Coordinator*: 💿 User 🔵 Role	Houston Contracting				
	Joe Fredericks				
isplay:	ms Roles Edit				Total Review Duration: 2 da
Search all Contacts	Go				
Name			) Name	Company	Sequence Duration Optional Either (Days)
Daniel Hailey		C	Daniel Hailey	Haslam Construction	1 2
Fred Bassett Prasad Shetty			Sam Hook	Haslam Construction	2 2
Sam Hook					
		>>			
		<<			
	4 items in 1 pages				

- 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.
- 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 Visual Designer link at bottom of the screen. If a review team has already been defined it will be displayed graphically.

Save         Close         Duplicate	
Details Review/Release Defaults Review Team	
Adrian Hinkley Engineering Project Services (2 days) Joe Fredericks Houston Contracting (2 days)	Review Coordinator Optional Either
٩	- •
Add Reviewer Add Parallel Connector Validate Connections	Classic Designer

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.

				~ ~	•		- 0	ontacts	✓ ▲ Reports	🎗 Admir	•
ontacts					Searc	h Contacts Go Adv	anced	Saved	All Companies	-	
New D	elete Duplicate	Refresh	Print	Export	<b>▼</b>	lore 💌					
First Name	Last	Name		Email		Send Login Info			Security Group		
	T		T			Set User Preference			T	T	
					,	Make Inactive		ting	Client		*
						Make Restricted			Consultant		
					-	Make External					
						Add to Security Group			Client		
					ł	Remove from Security Group			Client		
					ğ	Import	Þ		Consultant		
						Contact Groups			Test Group		
					r	Free Form Review Teams			Test Group		
					3	Roles			Test Group		
					1	Register View	•		Test Group		
				-	n	1M Consulting	0		Test Group		

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

ree Form Review Teams	Search Review Teams Go
New Delete Duplicate Refresh Print Close	
Title 🔺	
Alternate Review Team Electrical - High Voltage	
Electrical - Low Voltage	
Plumbing alternative	
Structural Review	
H A 1 H Page size: 100 V	7 items in 1 pages

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

Save Duplicate Close						
ītle*:						
Document Review Coordinator:	Select a company					-
	Select a contact					•
Display:      All Contacts				Tot	al Review Duration: 0	days
Company: Select a company		<b>•</b>				
Search all Contacts		Go				
Name			Name	Company	Sequence Duration Optic (Days)	onal
		No re	ecords to display.			
No records to display.						
lo records to display.						
lo records to display.		>>				
io records to display.		>>				

- 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	151
12.2 Terminology	. 151
12.3 Access to the Project Creation Tool	. 155
12.4 Creating a New Project	. 155
12.5 Change Password	155
12.6 Additional Project Creation Users	156

## **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..