
**DOCUMENT DRIVE
USER GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – INTRODUCTION TO DOCUMENT DRIVE

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1.1 DOCUMENT DRIVE IN INEIGHT DOCUMENT

InEight Document Drive has been produced in response to the increasing demand of having one platform to store uncontrolled documents, or even controlled documents prior to them being processed in to a Document management system.

InEight Document Drive is available both as a standalone application and as a Windows Integration tool. While the Window Integration offers the familiarity of a windows interface and quick access to files, the standalone application demonstrates a seamless integration with OneDrive and a clearer view of the register metadata. Both versions allow users to upload documents, images and videos into InEight Document modules such as Documents, Published Reports and Gallery.

1.2 DOCUMENT DRIVE BENEFITS

Some of the benefits of Document Drive include:

- Familiar interface
- Immediate access to InEight Document content
- Integration with other Windows applications
- Ability to manage local/offline storage
- Integration with Microsoft OneDrive for seamless files transfer
- Restful API based integration support for other applications.

1.3 DOCUMENT DRIVE STANDALONE APPLICATION VS WINDOWS INTEGRATION

Windows Integration	Standalone Application
Familiar Windows interface.	Simplified register view.
Ability to select project view or folder structure view.	Grid view with clear metadata display in register.
Ability to upload a single document.	Bulk Upload available via drag and drop
Ability to select which available module to synchronise.	Documents, Published Reports and Gallery registered by default – access is inherited from the project
Ability to drag and drop files from other windows applications.	Ability to drag and drop files from other windows applications; and Seamless transfer to and from Microsoft OneDrive
All settings are controlled in Application Preferences.	Folder display format and synchronisation message display are available in Settings

CHAPTER 2 – INSTALLING INEIGHT DOCUMENT DRIVE

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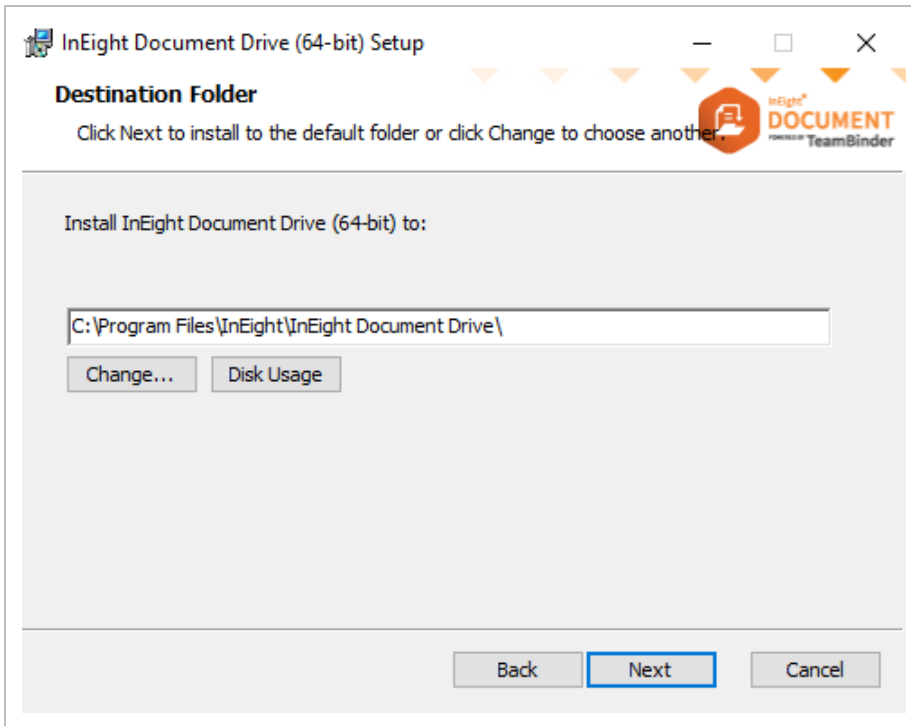
2.1 DOWNLOAD LINK

Download the installation package using the following link:

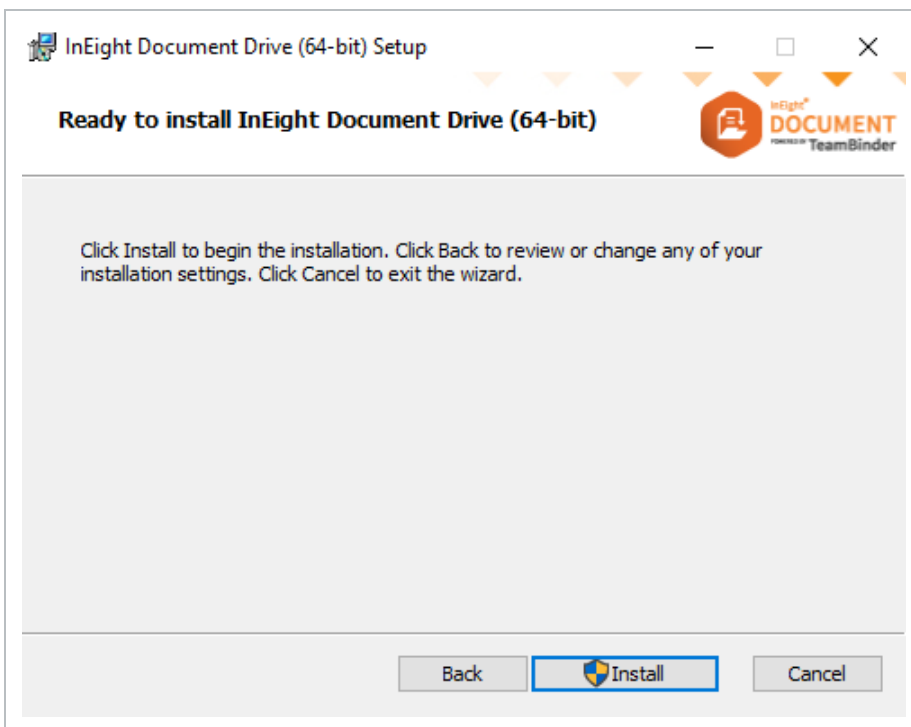
- [InEight Document Drive Windows Integration 32-bit version:](#)
- [InEight Document Drive Windows Integration 64-bit version:](#)

2.2 INSTALLATION STEPS

1. Once the download is complete, unzip the zip files.
2. Double click and run the setup **msi** from the extracted files.
3. Select the required option for the Installer, (Standalone, Integrated or Both) then click **Next**.
4. Select the Destination Folder.

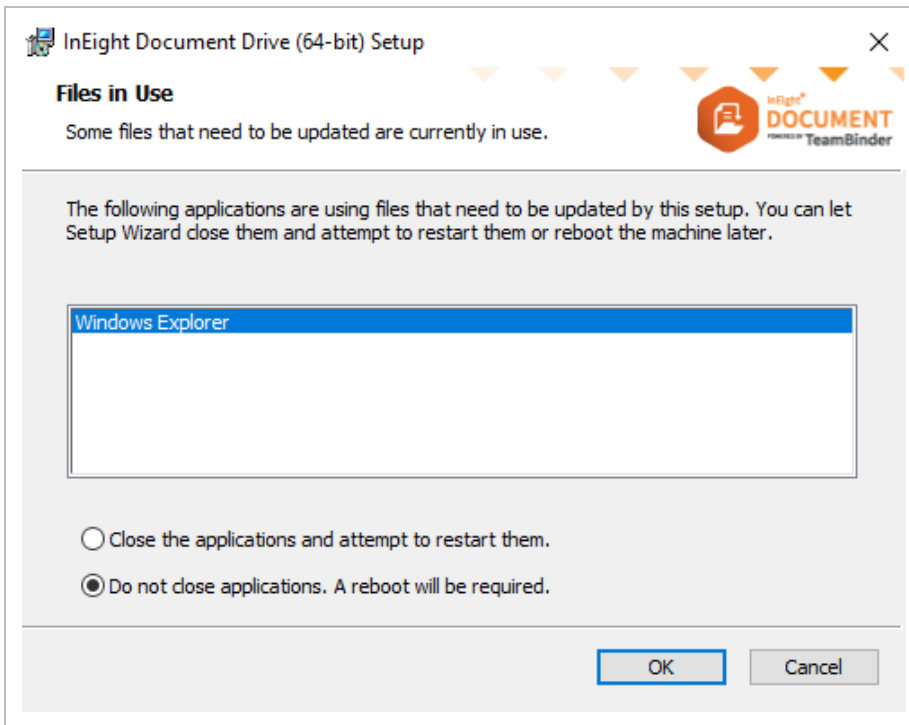


5. Click **Next** once more then **Install**.



6. Select option "Do not close applications. A reboot will be required."

Currently, if option “Close the applications and attempt to start them.” is selected, Task bar will be hidden alongside with all opened applications. We will be addressing this in a future upgrade.



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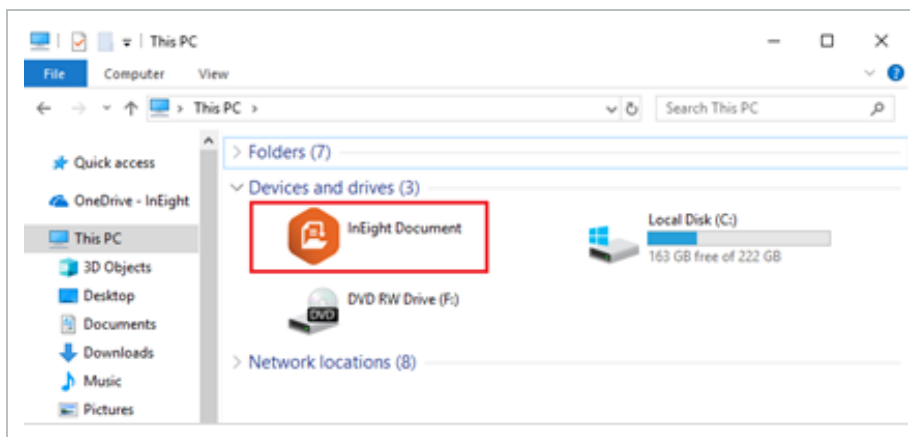
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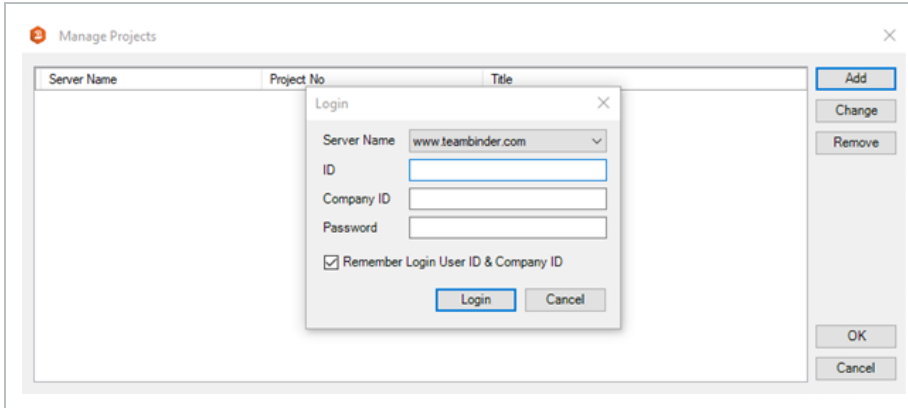
3.1 ADD PROJECTS

Once installed, the application is available as a drive in **This PC** on user's computer.

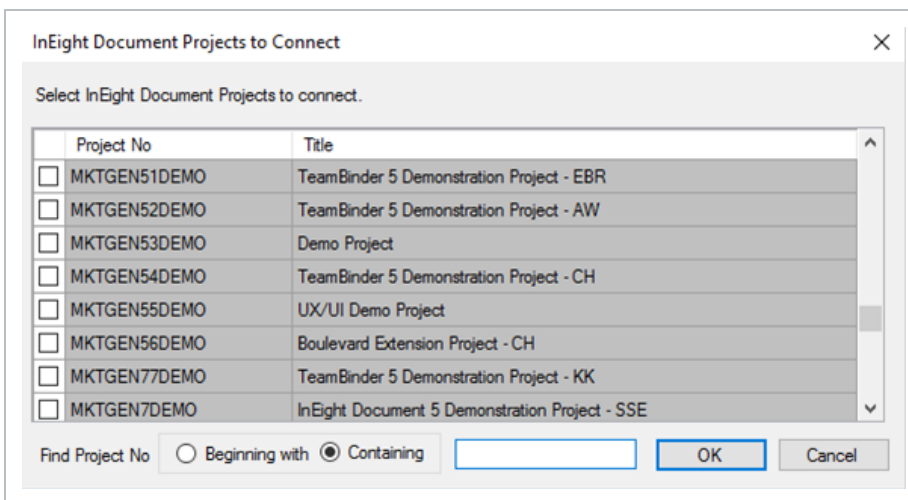
1. Double click on **Drive** to open the application in Windows.



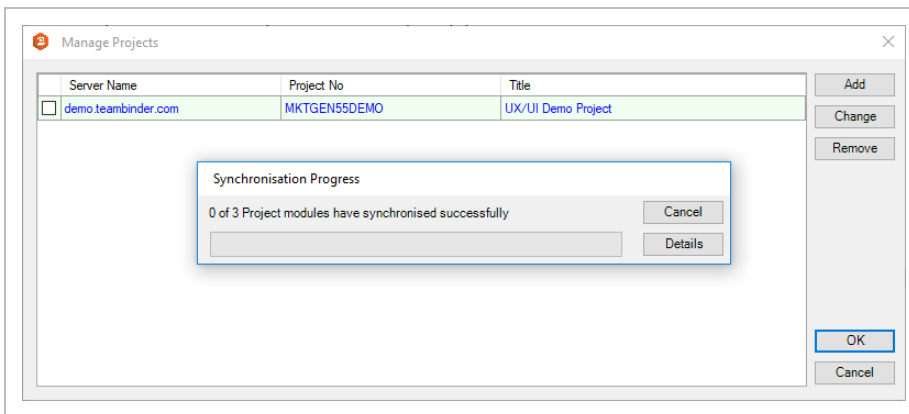
2. Right click and select **Manage Projects**.



3. Click **Add** button.
4. Enter InEight Document credentials.
5. Click **Login**.
6. Select the required project.



7. Click **OK**.
8. The Synchronisation Progress bar pops up providing progress of each module.



9. Once synchronisation is complete, click **OK**.

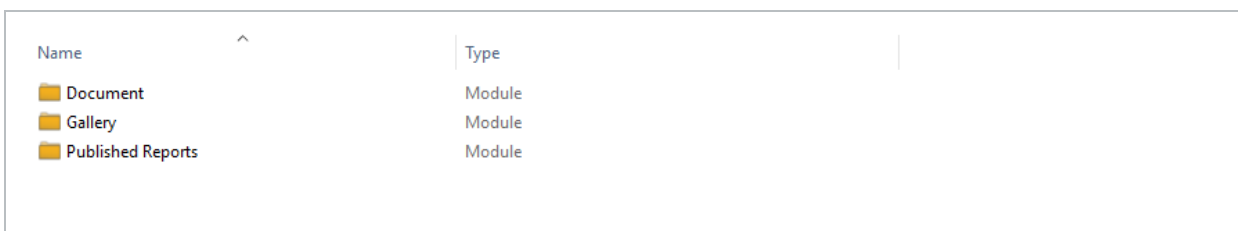
3.2 REMOVE PROJECTS

To remove existing project, simply follow these steps:

1. Double click on the Drive to open application in Windows.
2. Right click and select **Manage Projects**.
3. Select the project.
4. Click **Remove** and click **OK** to confirm project removal.

3.3 INTRODUCTION TO THE INTERFACE

1. By default, users see folders titled according to the project added.
2. By double clicking on the project, users will see a folder structure within, with each folder representing each module that they have access to in the project. In this example, this user has access to all three modules: Document, Gallery and Published Reports.



3.4 VIEW DOCUMENTS AND CUSTOMISING THE REGISTER





There are two main viewing options that can be set up, depending on user preference for viewing documents. The register view can also be customised via application preferences.

3.4.1 Folder Structure View

In this view, users will see that documents are sorted into a hierarchal structure based on their Discipline, followed by Category and Type. The documents displayed are Latest Unrestrained documents.

Example: The below document QS-07-002.A.Expo Map can be found under:

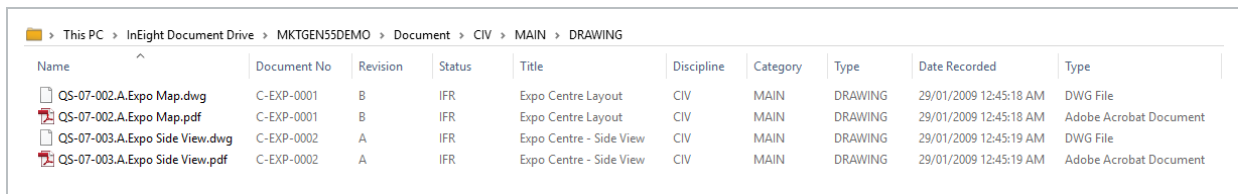
- Discipline: CIV – Civil
- Category: Main
- Type: DRAWING

DRAWING					
Share		View			
> This PC > InEight Document Drive > MKTGEN55DEMO > Document > CIV > MAIN > DRAWING					
Name	Document No	Revision	Status	Title	
 QS-07-002.A.Expo Map.dwg	C-EXP-0001	B	IFR	Expo Centre Layout	
 QS-07-002.A.Expo Map.pdf	C-EXP-0001	B	IFR	Expo Centre Layout	
 QS-07-003.A.Expo Side View.dwg	C-EXP-0002	A	IFR	Expo Centre - Side View	
 QS-07-003.A.Expo Side View.pdf	C-EXP-0002	A	IFR	Expo Centre - Side View	

3.4.2 Document Metadata

1. In this view, users will see a similar folder structure to that of their project.
2. User can drill down and see within a folder, document metadata is displayed according to the Documents register in the project.

3. Columns can be modified if required, as per standard Windows explorer functionality.



Name	Document No	Revision	Status	Title	Discipline	Category	Type	Date Recorded	Type
QS-07-002.A.Expo Map.dwg	C-EXP-0001	B	IFR	Expo Centre Layout	CIV	MAIN	DRAWING	29/01/2009 12:45:18 AM	DWG File
QS-07-002.A.Expo Map.pdf	C-EXP-0001	B	IFR	Expo Centre Layout	CIV	MAIN	DRAWING	29/01/2009 12:45:18 AM	Adobe Acrobat Document
QS-07-003.A.Expo Side View.dwg	C-EXP-0002	A	IFR	Expo Centre - Side View	CIV	MAIN	DRAWING	29/01/2009 12:45:19 AM	DWG File
QS-07-003.A.Expo Side View.pdf	C-EXP-0002	A	IFR	Expo Centre - Side View	CIV	MAIN	DRAWING	29/01/2009 12:45:19 AM	Adobe Acrobat Document

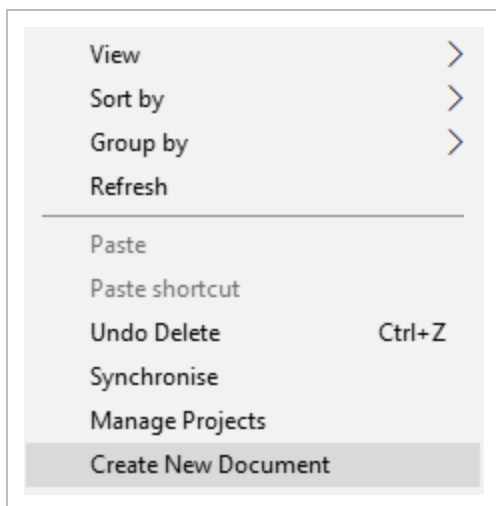
3.4.3 Customise Register view

1. Users can set up their preferred view through the application **Preferences**.
2. Refer to **3.7 Settings** for further details.

3.5 UPLOADING DOCUMENTS VIA THE EXPLORER INTERFACE

3.5.1 In Document register

Within the desired document folder, simply right click and select **Create New Document**.



3.5.2 In Tray icon area

1. Right click on the InEight Document Drive Windows Explorer Integration.
2. Select **New** then **Document**.

- 3. Select project. This opens the Single Document upload screen in the web application where upload can be completed as normal.

New Document

Save Print Close More Attach Files

Document No.*: ?

Rev*: -- Select a Revision --

Status*: -- Select a Status --

Title*:

Received:

Discipline*: -- Select a Discipline --

Category: -- Select a Category --

Area : -- Select an Area --

Type: -- Select a Type --

From User: Terry Hoang, TeamBinder TRAINING

Date Recorded: Date Released:

Revision Notes:

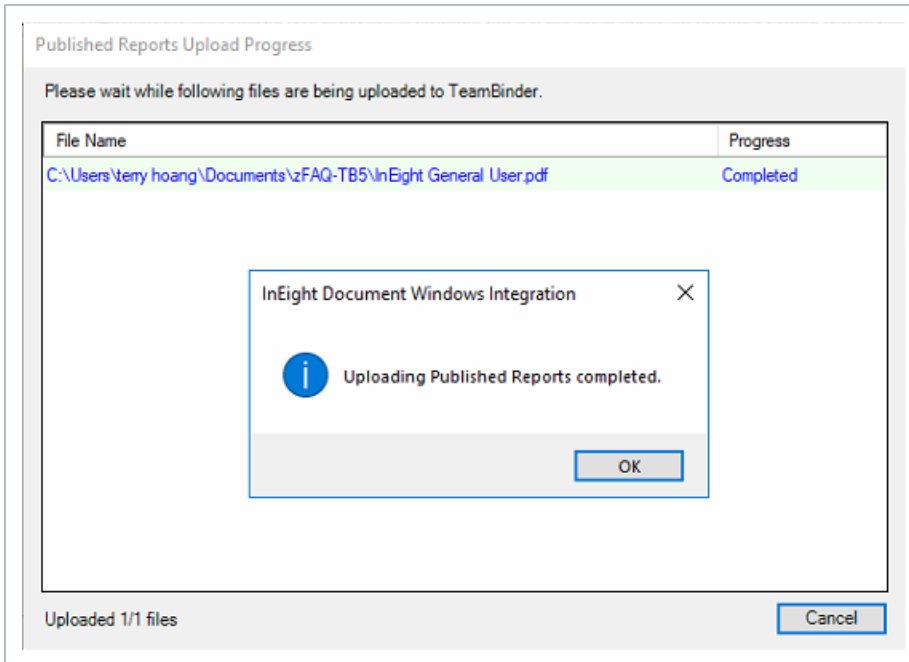
Remarks:

Reason:

3.6 MANAGING GALLERY AND PUBLISH REPORTS USING WINDOWS EXPLORER INTEGRATION

3.6.1 Uploading items using Document Drive

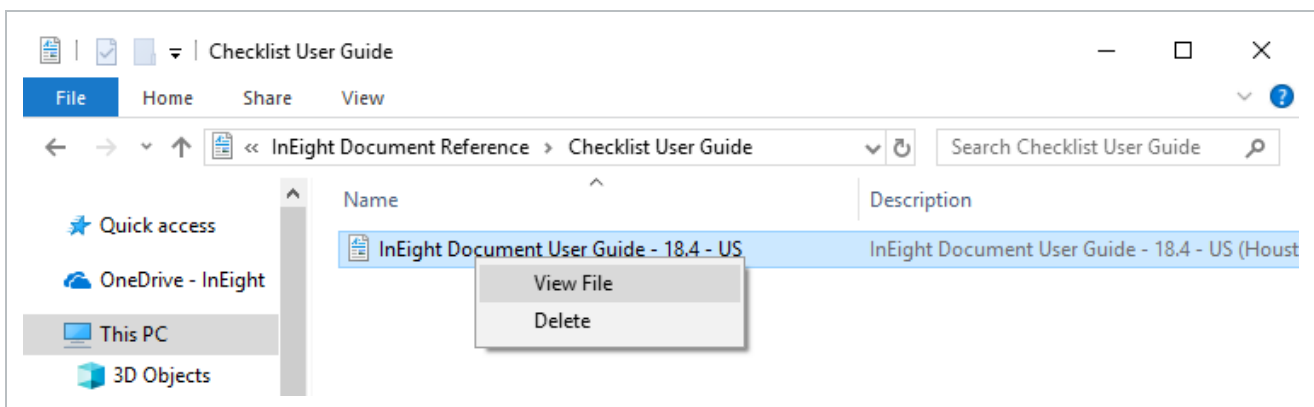
1. Items can be uploaded quickly and easily using the drag and drop method in both Gallery and Publish Reports.



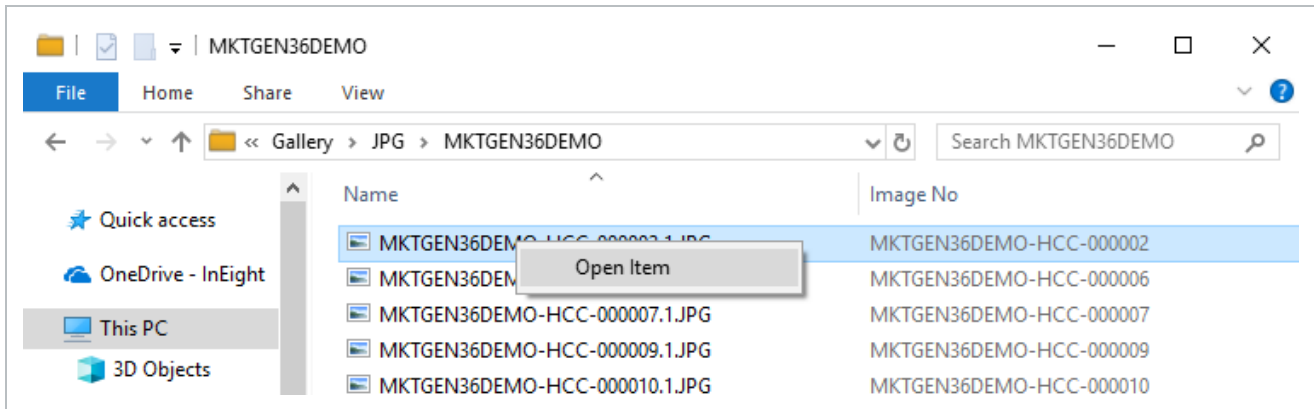
2. Upon completion, users receive a pop up message confirming items have been uploaded successfully.

3.6.2 Viewing files

From within Published Reports folder: Right click on the document and select **View File**. This opens the item in the default native application.



From within Gallery folder: Items are sorted by file type, then by project. Double click on an item to view it in the default native application.



Alternatively, right click on the item and select Open Item, log in and view item in the project.

3.6.3 Deleting Items

Items can be deleted within Publish Reports provided that there are no child nodes existing under the item.

1. Right click on the item.
2. Select **Delete**.

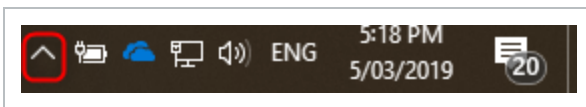
NOTE It is not possible to delete existing images and videos from within Gallery folder.


3.7 WINDOWS EXPLORER INTEGRATION PREFERENCES

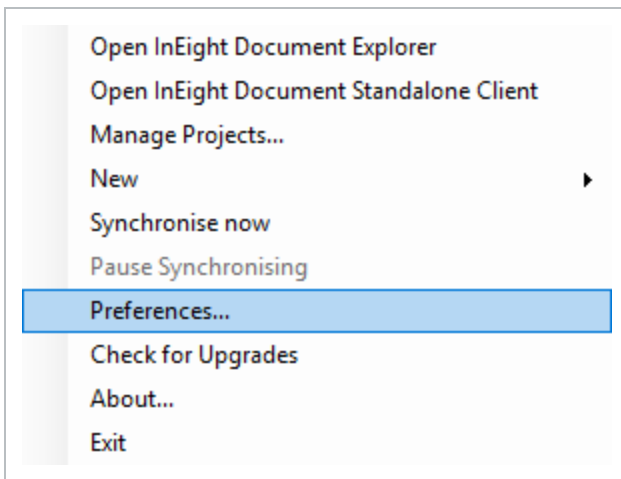
3.7.1 Accessing Windows Explorer Integration Preferences

To access Windows Explorer Integration Settings:

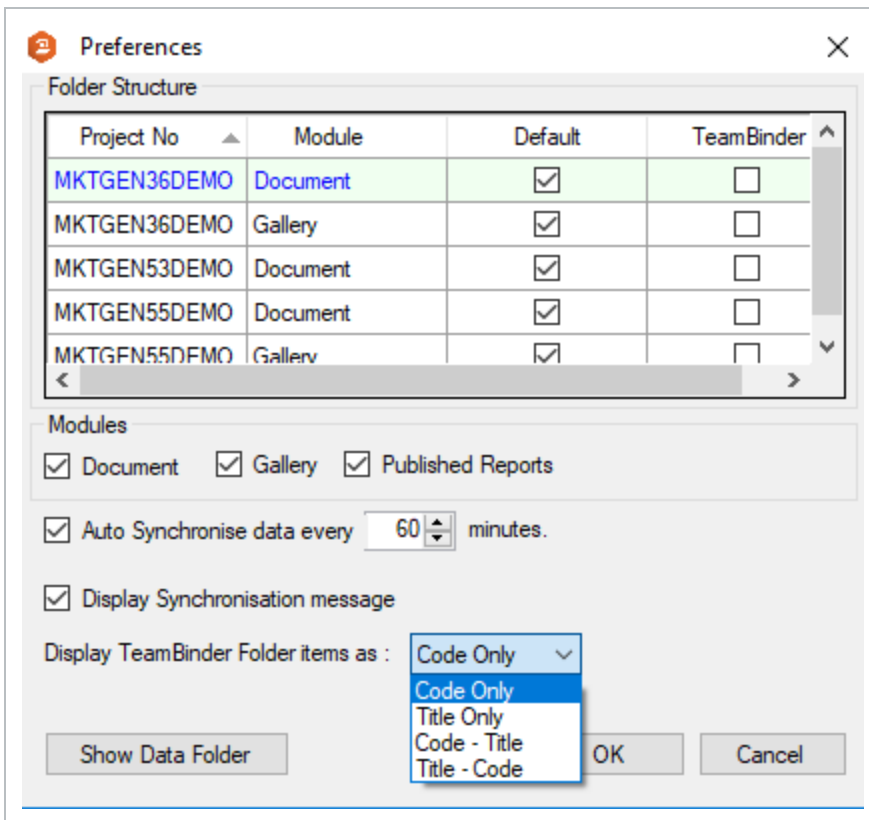
1. Locate the Drive Windows Explorer Integration icon in the system tray \ area.



2. Right click on the InEight Document Drive Windows Integration icon  and select **Preferences**.



3. This opens the Preferences window



3.7.2 Preference Options

Available settings for the Windows Explorer Integration are listed in the table below.

Setting	Options
Folder Structure	Default: mimics the display folder structure on the project. TeamBinder: display metadata the same as Documents register.
Modules	User can select which modules need to be synchronised with inherited user access from the project.
Auto Synchronise data period	By default, it is set to 60 minutes. Minimum period is 15 minutes.
Display Synchronisation message	Whether synchronisation message is displayed.
Item Display format	Example: Code Only: CIV Title Only: Civil Code – Title: CIV - Civil Title – Code: Civil CIV

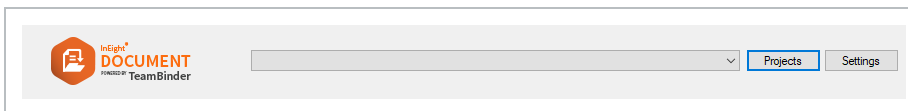
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4.1 ADD / REMOVE PROJECTS

Once installed, a shortcut for the Windows standalone application is created on the user's Desktop.

1. Double click on the shortcut to open the application.
Click **Projects** button.



2. Projects can then be added or removed as per Windows Explorer Integration (refer to sections **3.1** and **3.2** for instructions).

4.2 INTRODUCTION TO THE INTERFACE

Document, Gallery and Published Reports tabs represent the corresponding modules currently available in the Windows Drive Application.

For Documents and Gallery, the folder structure is available on the left-hand screen, while right-hand screen display document metadata in a grid view. The documents displayed by default are the Latest Unrestrained documents.

For Published Reports, the displayed folder structure matches the folder structure as found in the project.

The screenshot displays the InEight Document Drive application interface. At the top, the title bar reads 'InEight Document Drive v0.12.04.00'. Below the title bar, the application logo 'InEight DOCUMENT powered by TeamBinder' is visible. The main content area is titled 'MKTGEN36DEMO - TeamBinder 5 Demonstration Project - TE' and includes 'Projects' and 'Settings' buttons. A navigation pane on the left shows a tree view of folders under 'TeamBinder 5 Demonstration Project', including 'ADMINISTRATION', 'AUTHORITY / PERMITS / N', 'Block D - Level 2', 'CONTRACT MANAGEMENT', 'Corporate Structure', 'DESIGN PACKAGES', 'DRAWINGS', 'FINANCIAL', 'Follow Up List', 'LEGAL', 'MAIL', 'Maintenance', 'O&M MANUALS', 'OCCUPATIONAL HEALTH &', 'Operations', 'PLANT', 'PROJECT MANAGEMENT', 'QUALITY & COMPLETION', 'REPORTS', 'REPORTS - DAILY', 'SUBCONTRACTORS / SUPP', 'Services', 'Test.123', and 'Tyler Test'. The main table displays a list of documents with the following columns: Document No, Revision, Status, Title, and Discipline. The table contains 15 rows of data, with the first row highlighted in green.

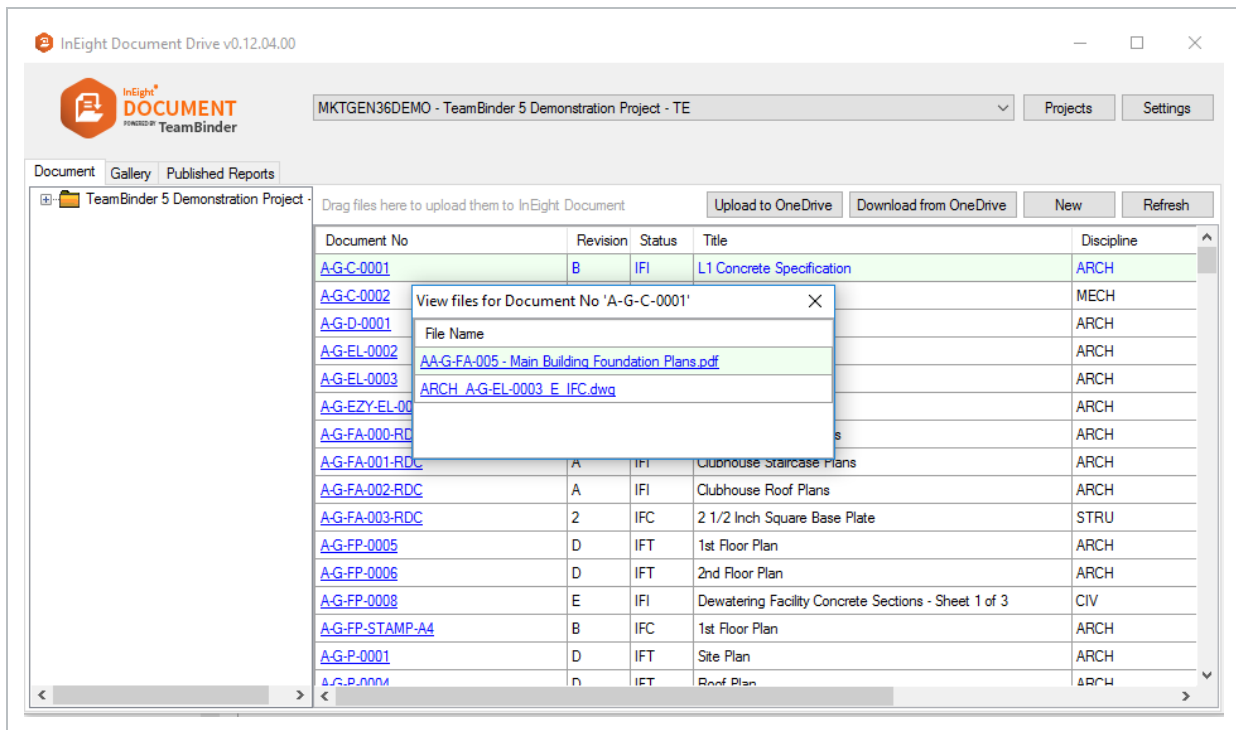
Document No	Revision	Status	Title	Discipline
A-G-C-0001	B	IFI	L1 Concrete Specification	ARCH
A-G-C-0002	B	IFI	P&ID - Ultra Filtration	MECH
A-G-D-0001	D	IFT	Roof Design Details	ARCH
A-G-EL-0002	F	IFR	Front Elevation	ARCH
A-G-EL-0003	F	IFI	Rear Elevation	ARCH
A-G-EZY-EL-0003	B	IFC	Rear Elevation	ARCH
A-G-FA-000-RDC	A	IFI	Level 1 Concrete Specs	ARCH
A-G-FA-001-RDC	A	IFI	Clubhouse Staircase Plans	ARCH
A-G-FA-002-RDC	A	IFI	Clubhouse Roof Plans	ARCH
A-G-FA-003-RDC	2	IFC	2 1/2 Inch Square Base Plate	STRU
A-G-FP-0005	D	IFT	1st Floor Plan	ARCH
A-G-FP-0006	D	IFT	2nd Floor Plan	ARCH
A-G-FP-0008	E	IFI	Dewatering Facility Concrete Sections - Sheet 1 of 3	CIV
A-G-FP-STAMP-A4	B	IFC	1st Floor Plan	ARCH
A-G-P-0001	D	IFT	Site Plan	ARCH
A-G-P-0004	D	IFT	Roof Plan	ARCH

4.3 VIEWING DOCUMENTS WITHIN REGISTER

To view documents within the Windows application:

1. Click on the document hyperlink within the Document No column.
2. Click on the required view file (if multiple view files are available).

- This will open the view file in the native application (eg pdf).

**NOTE**

Users can customise registers by adjusting column width, however, column order cannot be adjusted currently.

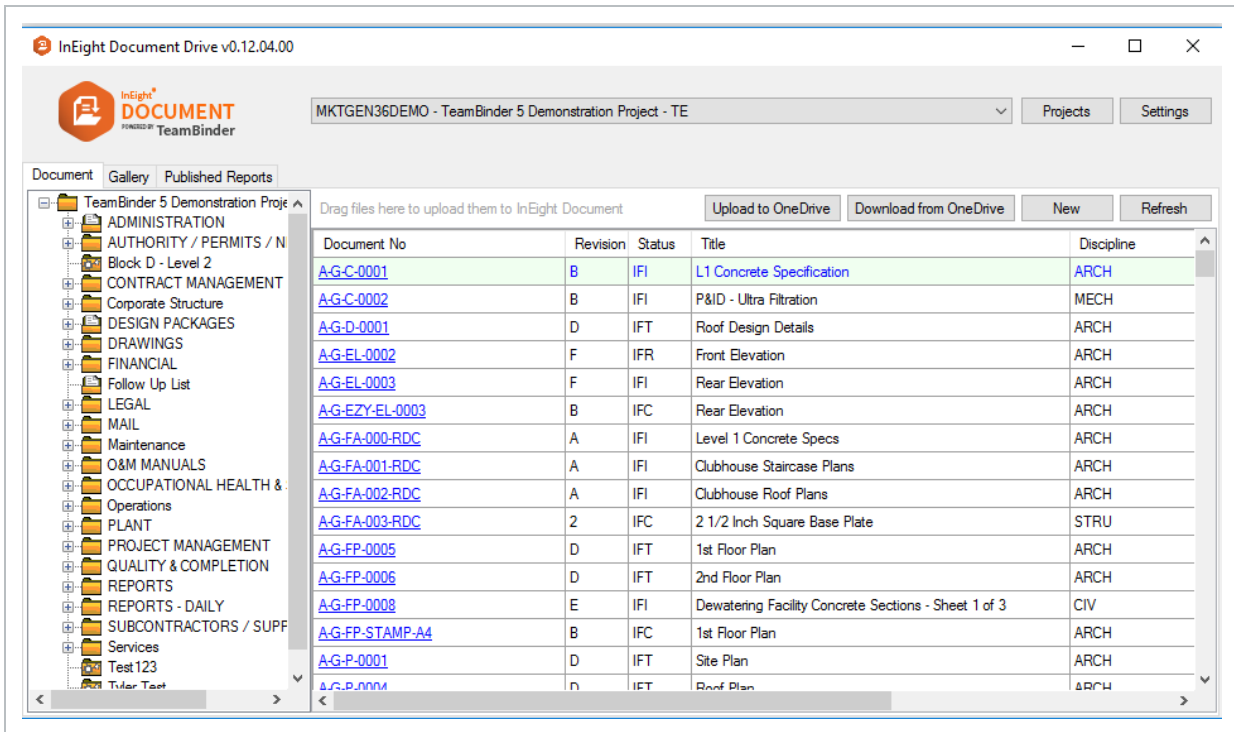
4.4 UPLOADING DOCUMENTS

4.4.1 Standard Single upload

- Click on the **New** button.
- This opens the standard web application single Document upload screen.
- Follow the standard upload process.

4.4.2 Bulk upload

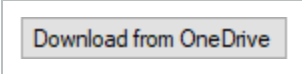
- Drag and drop multiple files to the area above the Document No field as indicated in the image below.



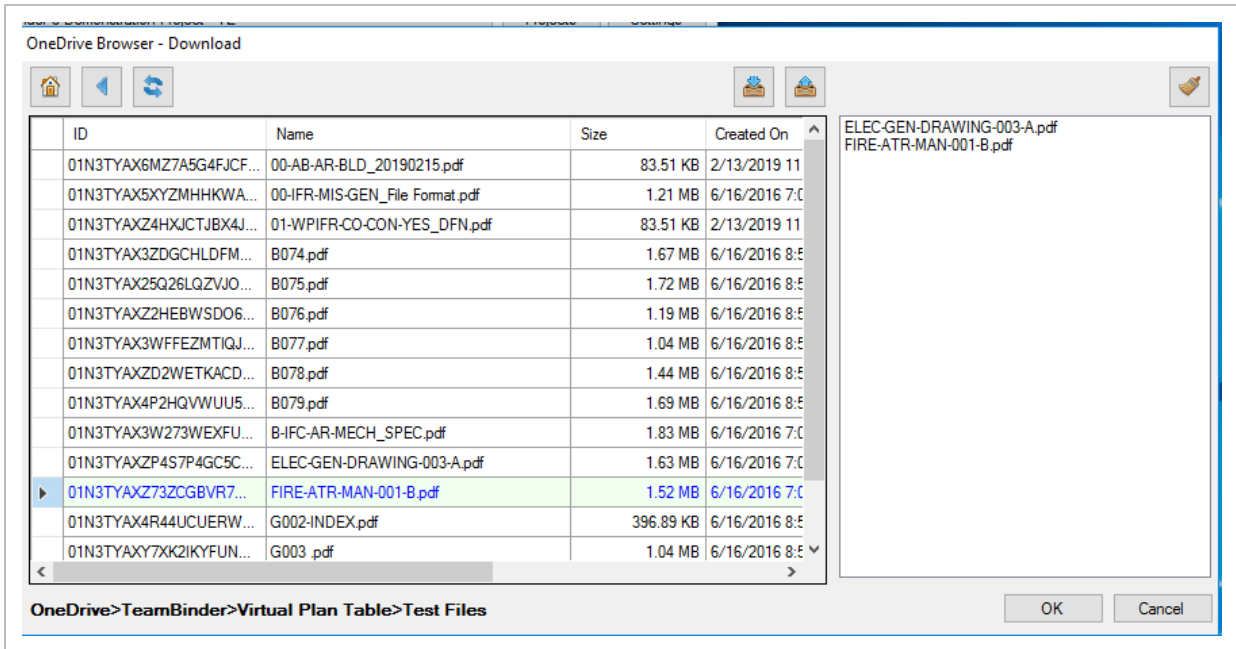
2. This opens up the InEight Document Bulk Upload screen in the web application.
3. Follow the standard bulk upload process.

4.4.3 Downloading from Microsoft OneDrive

The Document Drive Windows Standalone application offers seamless files transfer to and from Microsoft OneDrive.

1. Click  button.
2. Sign in Microsoft OneDrive.
3. OneDrive folder structure is displayed on the left-hand screen.
4. Double click on the folder to drill down.

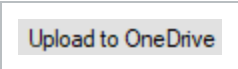
- Double click on the required files to bring them to the right-hand screen.

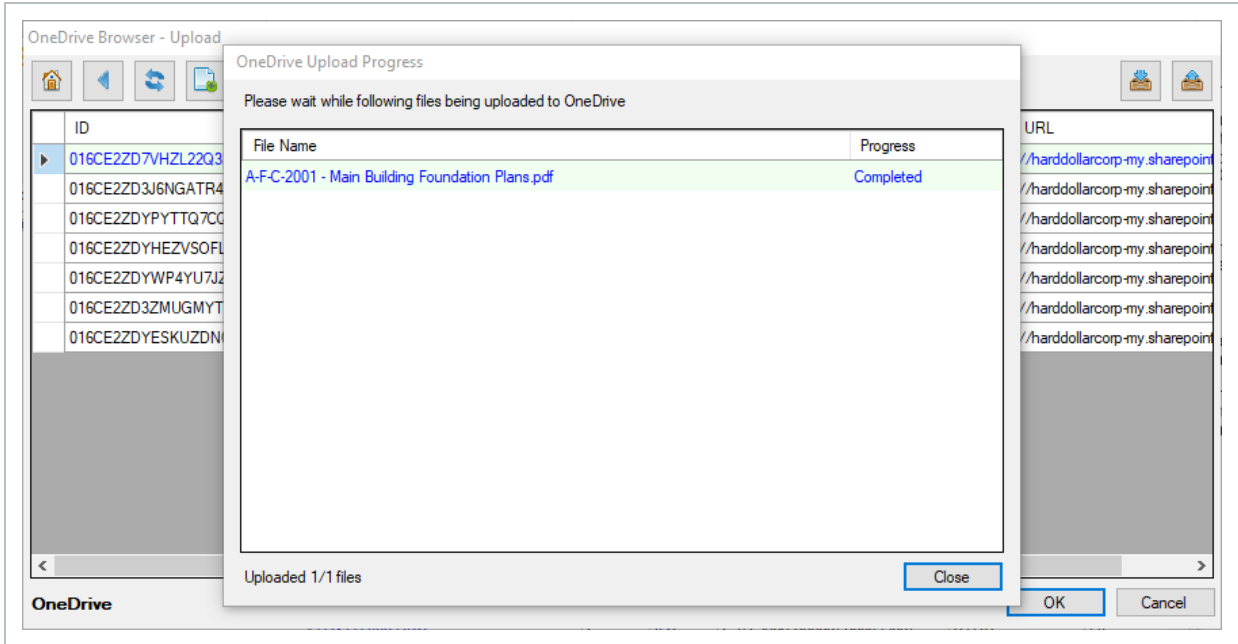


- To remove items from the right-hand screen, double click on them and confirm removal.
- Click **OK**.
- Complete action in InEight Document Bulk Upload screen in the web application.

4.4.4 Uploading to Microsoft OneDrive

- Select the document in the register.

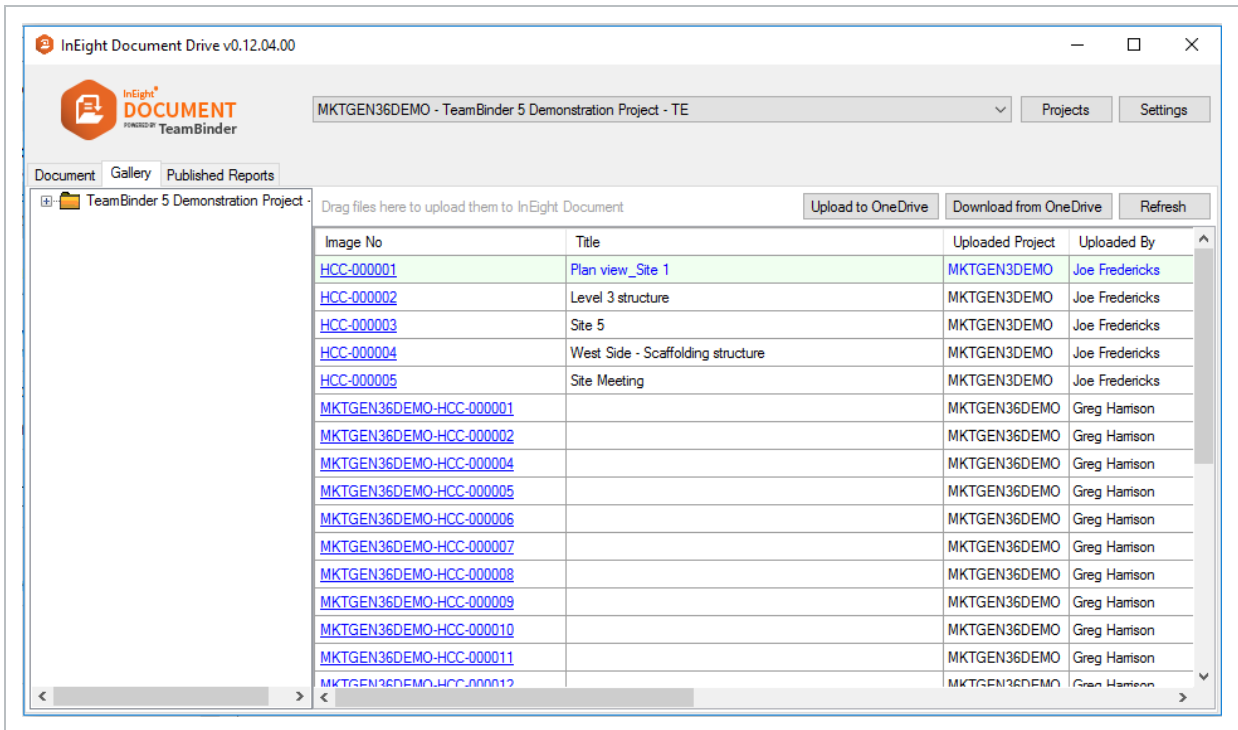
- Click  button.
- Click **OK**.



4.5 MANAGING GALLERY VIA THE WINDOWS APPLICATION

4.5.1 Images and videos can be uploaded from OneDrive by using two methods:

- Dragging and dropping the files to the designated space.



- Using the  option.

Items can be viewed by selecting the hyperlink in the “Image No” column to open the item in the default native application.

A new folder can be added by right clicking on a folder and selecting **New**.

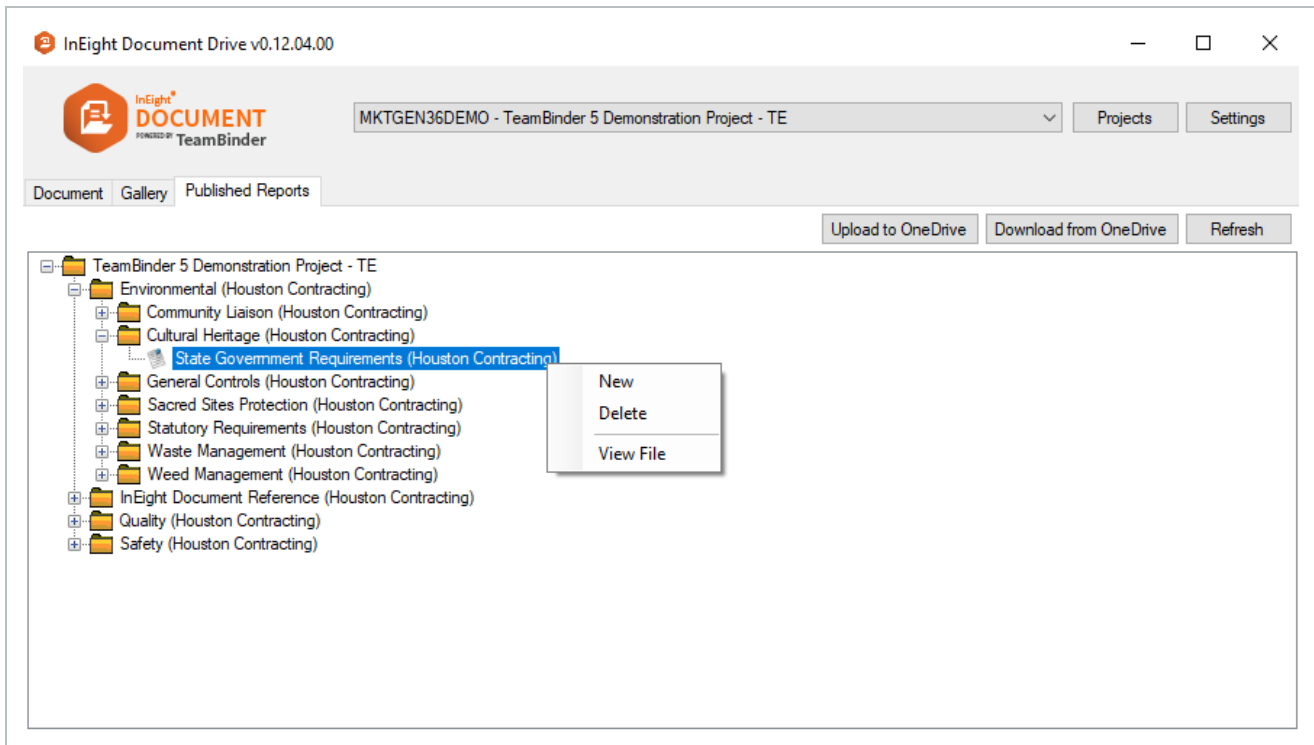
NOTE Items cannot be deleted from the Gallery tab.

4.6 MANAGING PUBLISHED REPORTS VIA THE WINDOWS APPLICATION

4.6.1 Files can be uploaded from OneDrive by using the

Download from OneDrive

option;



NOTE

- A new folder can be added by right clicking on a folder and select **New**.

- Files can be viewed by right clicking on the item and selecting **View File**. The item will be opened in the default native application.
- Files can be deleted provided there are no child nodes existing under the item by right clicking on the item and selecting **Delete**.

4.7 WINDOWS STANDALONE APPLICATION SETTINGS

Basic settings can be accessed within the Windows application via the Settings button.

NOTE

Other settings as defined in the Windows Explorer Integration Preferences also apply in the Standalone Application.