STANDARD PACKAGES USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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1. STANDARD PACKAGES OVERVIEW

Standard Packages can be used to group documents and recipients for the purpose of managing the issue of documents.

Standard Packages consist of:

1. A Package ID and title.

2. General details about the package.

3. A list of documents.

4. A list of recipients.

5. A transmittal history of package releases and addenda.

All notifications issued as part of the Package Module are treated as Transmittal notifications and are automatically added to the Sent Transmittals Register and Incoming Transmittals Register.

The packages module includes Inbox, Drafts and Sent Items. If you have access, this module can be found by selecting Packages from the left menu.

Clicking on an option opens the register view.

Packages can be sorted by clicking on column headers or using the column filters. You can also search for packages using the Quick Search box above the register or by clicking on **Advanced**.

Double click to open, read and amend packages.

2. OUTGOING STANDARD PACKAGES

2.1 CREATING A STANDARD PACKAGE

1. Click **New,Package** and then **Standard Package**.
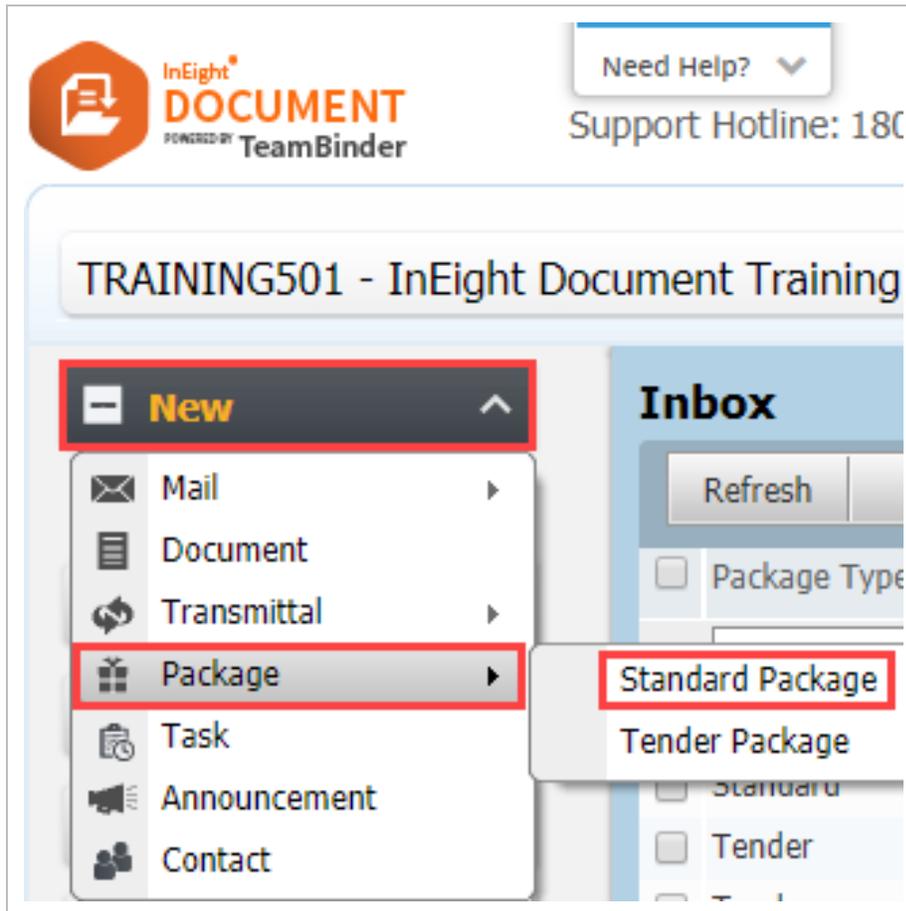
2. At the **New Standard Package** window, enter the details of the package ensuring that all the mandatory fields marked with a red asterisk (*) are populated.

3. The fields at the package details window are:

Field	Description
Package ID*	Package identifier.
Package Title*	Package Title.
Trade	The Trade the Package relates to.

Field	Description
Reason for Issue	The Reason for Issuing the Package from the drop down selection. If OTHER is selected, then the Reason must be entered manually.
Approximate Value	Approximate value of the package (optional)
Preferred Format	Preferred file format for documents.
Long Title	A long title for the package
Details	Any further details

* Means the field is mandatory.

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

NOTE	• Packages with similar details can be duplicated by selecting the package then from **More** select **Duplicate**.
	• Packages can be created from the Documents Register by selecting the documents to be included then from **Transmit**, select **Create Standard Package**.

2.2 ADDING STANDARD PACKAGE DOCUMENTS

Documents must already exist in the Document Register and be released or un-restrained before they can be added to a standard package.

To add documents to a package:

1. Open the Standard Package from the **Drafts** Folder.
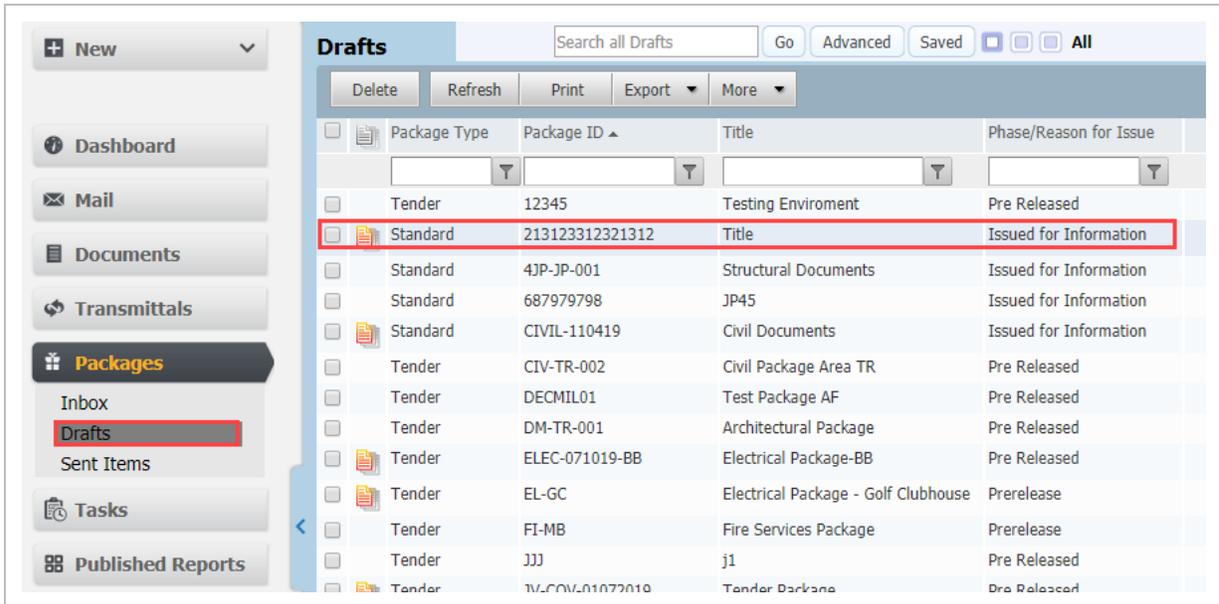
2. Click on the **Documents** tab.
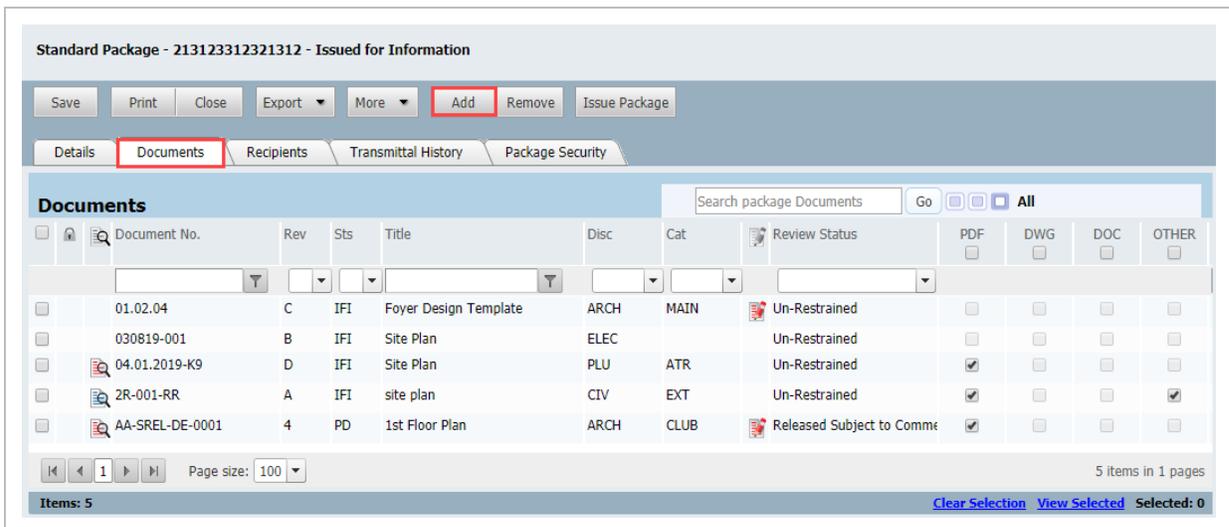
3. Click the **Add** button, apply any search conditions as required and click **Search**.
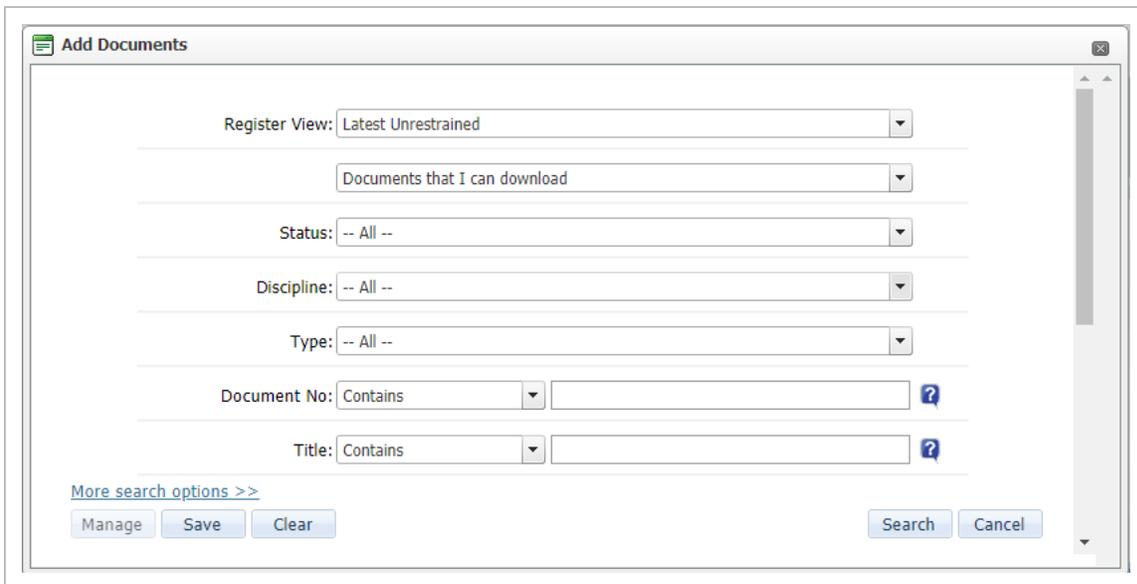
4. Select the documents to be added to the package, if there are multiple formats available for the document, select the required formats to include.
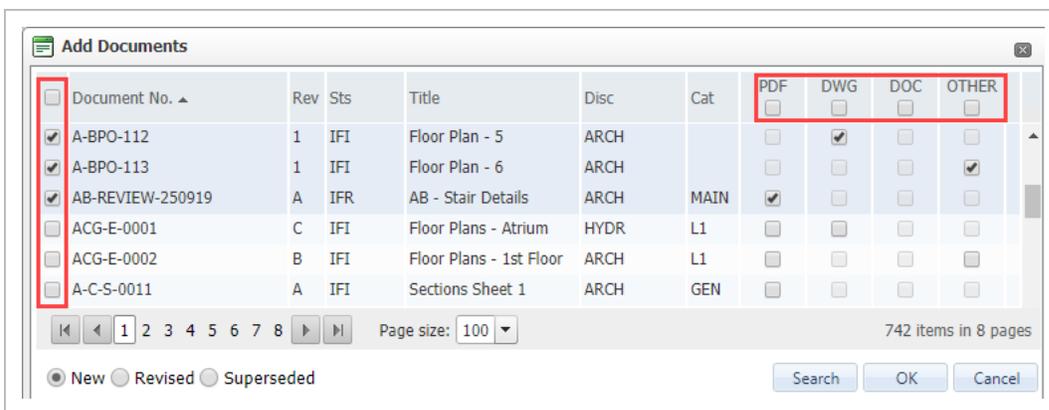
5. Click the **OK** button then **OK** again when prompted.

6. Repeat to add additional documents.

NOTE	• Only documents a user has access to can be added to a Package.

- When viewing the details relating to a Package, use the **Customize** option available from **More, Register View** to customize the columns displayed at both the Documents and Recipients registers.

- When viewing the list of documents within a Package, use the link icon to view any linked items associated with a document.

- To Export a list of the documents within a Package go to the **Documents** tab, **Export,Excel**.

- A hyperlink to a package can be sent to another user to take them directly to the package. Right click on a package and select **Generate Package Hyperlink**. Choose **Copy to Clipboard,** paste and send as required. The recipient must have access to Packages and will be prompted for their login details if they do not already have an open session in InEight Document.

2.3 ADDING STANDARD PACKAGE RECIPIENTS

Recipients (Companies and Contacts) must already exist in the Address Book before they can be added to a package.

To add recipients to a package:

1. Open the Standard Package from the **Drafts** folder.

2. Click on the **Recipients** tab.

3. Click the **Add** button.

4. Select the Company, then select the individual contacts to be included.

5. Repeat for additional companies and contacts.

6. Click the **View Selected** link when finished to check the selected companies and contacts.

7. Click **OK** and **Yes** when prompted to add the recipients to the Standard Package.

| NOTE | • Recipients can be selected based on Contact Groups or Roles.
| | • Recipients can be added to a package at any time prior to the package being issued.
| | • Use the **Advanced** search option to search for recipient companies by Trade.
| | • To Export a list of the recipients assigned to a Package go to the Recipients tab, then **Export** and Excel.
| | • Package Notifications for Standard Packages include the link **Click here to acknowledge receipt of package**. When selected the **Acknowledgement Received** date (if empty) will update against the Notification Transmittal shown in the Recipients tab of the package.

2.4 ISSUING A STANDARD PACKAGE

Once a standard package has been created and documents and recipients added, it can be issued. Recipients will receive a notification by email where they can download the package documents.

To issue a Standard Package:

1. Open the Standard Package from the **Drafts** folder.

2. Click the **Issue Package** button.
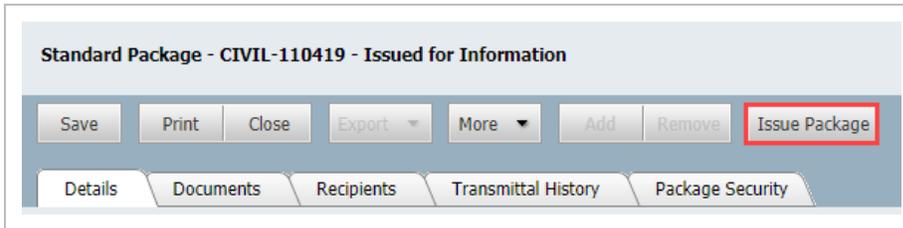
3. Enter a message to the Package Recipients and click **Send**.
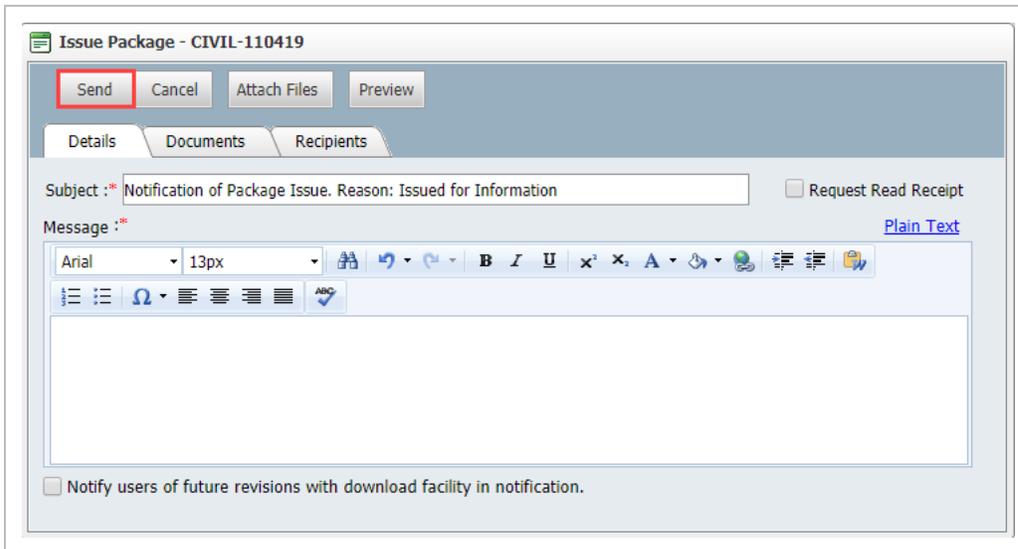
NOTE	• The Standard package issue notification is stored as a transmittal in the Sent Transmittals Register.
	• The Sent Items package register shows the Issue date as the Date Released.
	• Use the **Export** button to export the currently displayed register of packages to Excel.

# 3. MANAGING STANDARD PACKAGES

3.1 ADDENDUMS TO PACKAGES

During the phase of a standard package it may be necessary to:

1. Issue additional documents.

2. Issue revisions of existing documents.

3. Remove documents from the package.

This is managed using Addendums. Addendums relating to new or revised documents can only be issued once the new or revised documents are uploaded to InEight Document and released in the normal way and allocated to the Package.

To create an addendum to a package:

1. Open the Standard Package from the **Sent Items**.
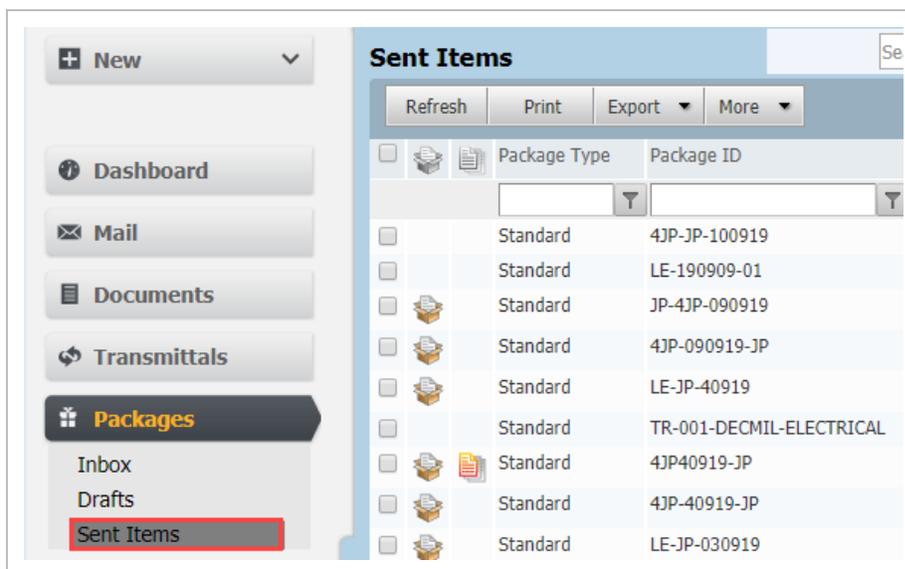
2. Click on the **Documents** tab and then **Add** to select the documents to add to the Standard

Package (which may be New or Revised Documents).
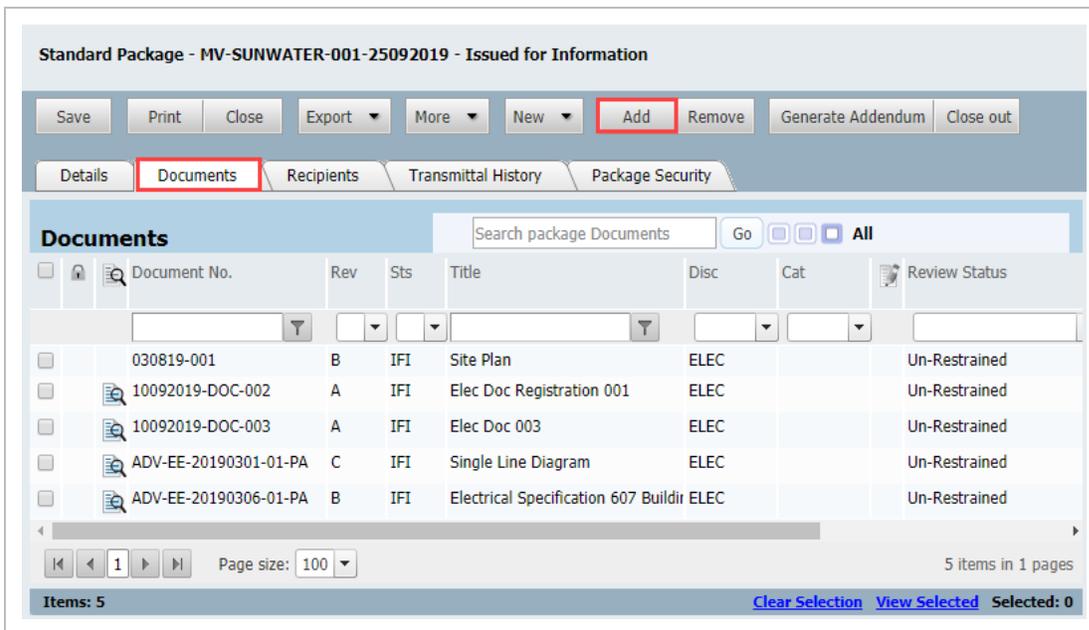
3. Enter search criteria to assist in locating the documents and click **Search**.
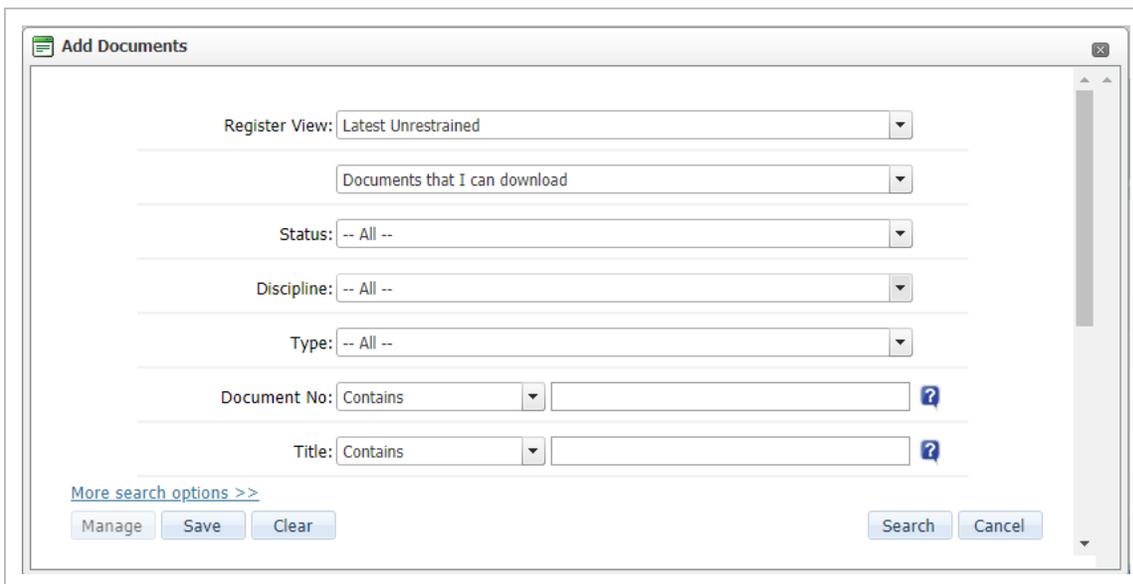
4. At the **Add Documents** window, use the **New** (Documents not already in the package), **Revised** (Revised versions of Documents that are already in the package), and **Superseded** (Superseded versions of documents in the package) options to assist with the search process.
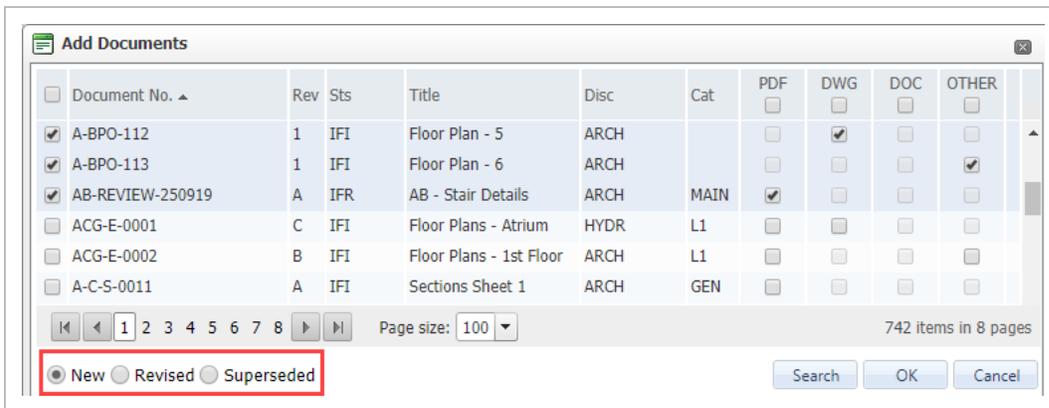
5. Select the documents to be added to the Standard Package and click **OK**. You will be prompted to send out the **Addendum**.
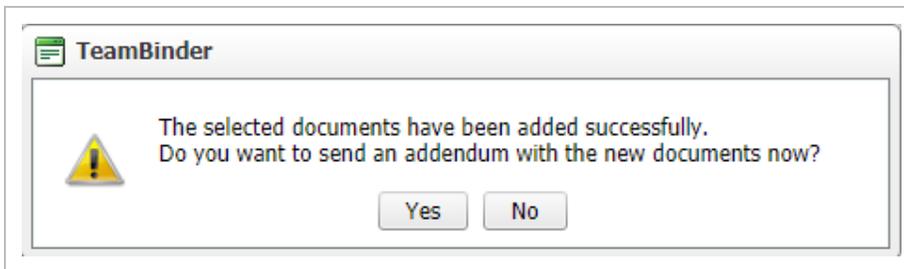
6. If **No** is selected use the **Generate Addendum** button within the package details window later to send the addendum.

7. When sending an Addendum enter a **Subject**, the **Reason** for the issue of the addendum and the Message that will appear on the addendum notification.

8. The recipient will be asked to acknowledge receipt of the Addendum prior to being able to download the addendum documents.

9. Click **Send**.

NOTE	• The Addendum email notification is stored as a transmittal in the **Sent Transmittals** Register.

- The acknowledgement of a notification of addendum is captured in InEight Document against the relevant invitation transmittal. The acknowledgement details can be viewed in both the **Recipients** tab within the **notification/transmittal** details window; and the **Recipients** tab within the Package Details screen.

- From **Packages**, **Sent Items** use the **Click to add Revised Document** icon visible in the Package register. This will take you directly to the **Add Documents** window to select the Revised Documents related to the Standard Package. If a project has document "versions" enabled in addition to the standard revision concept, documents that have had a change in version but not a change in revision can be excluded from being listed. Contact InEight to activate this.

- From **Packages**, **Sent Items** use the **Click to Issue Addendum** icon visible in the Package register to go directly to the Generate Addendum window.

3.2 ADDING ADDITIONAL RECIPIENTS

During the standard package period it may be necessary to add recipients.

To add a recipient to issued package:

1. Open the Standard Package from **SentItems**.
2. Click on the **Recipients** tab and then **Add** to select the additional Recipients.
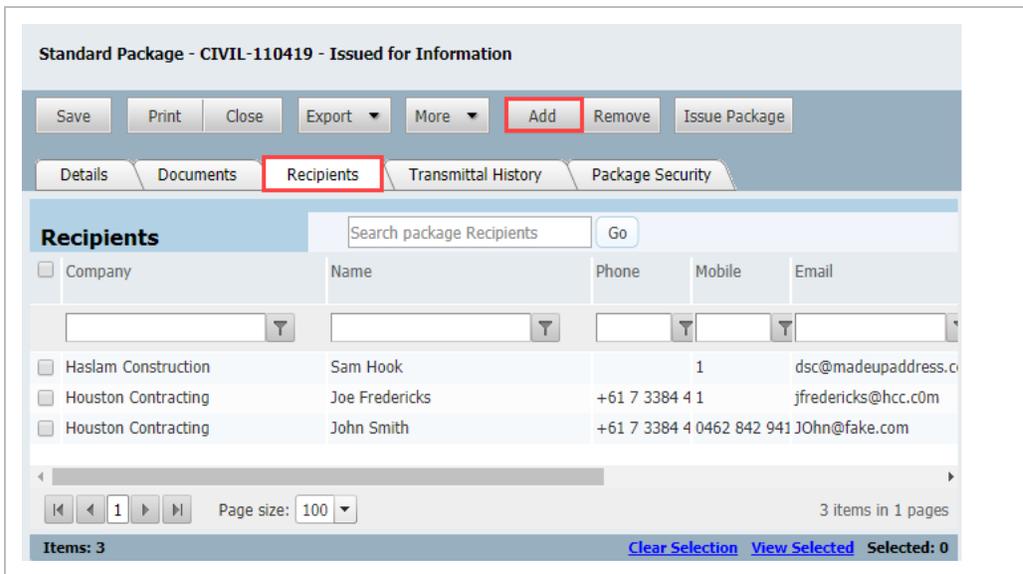
3. Select the Recipient Company and contact and click **OK** when done.
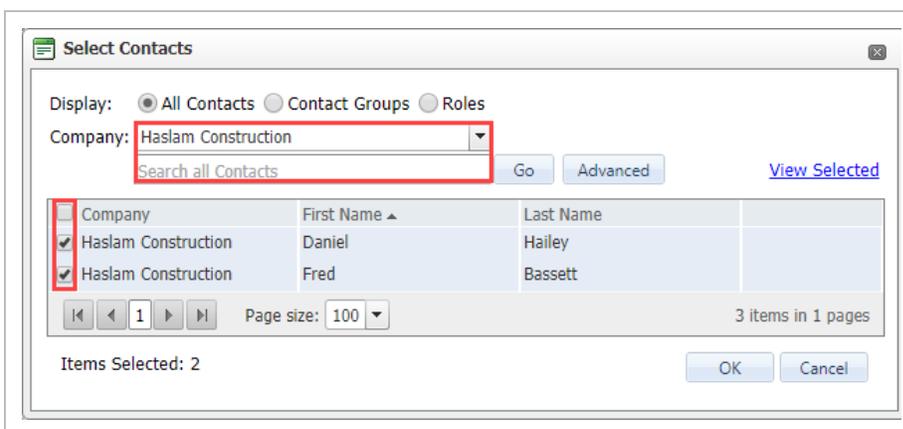
4. New Recipients will automatically receive the initial package and any addendums. Select the appropriate date option based on the current date or original dates at time of issue.
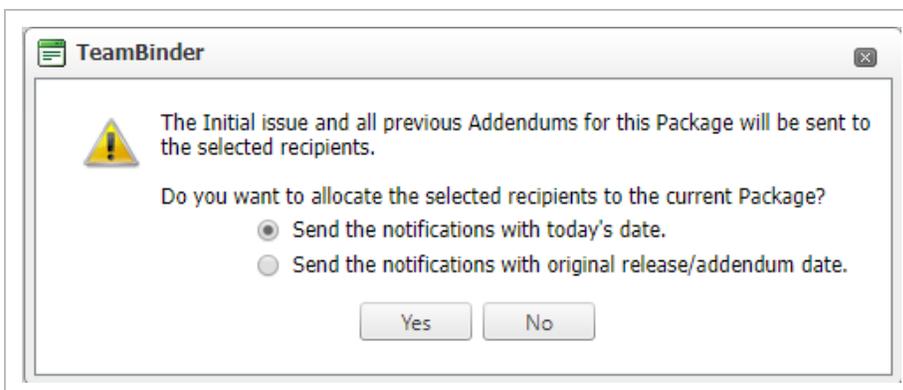
5. Click **Yes** to confirm that the Recipient(s) should be added to the notifications being sent.

# 3.3 REMOVING OR DE-ACTIVATING RECIPIENTS

Recipients can only be removed or deleted from a Standard Package if the package has not yet been issued. Once a Standard Package has been issued, recipients can be made in-active within the Standard Package. This will ensure they will not receive any further notifications such as Addendums.

To de-activate recipients:

1. Open the Standard Package from **Sent Items**.

2. Click the **Recipients** tab and locate the Recipient to be removed. Un-tick the **Active** tick box located to the right.
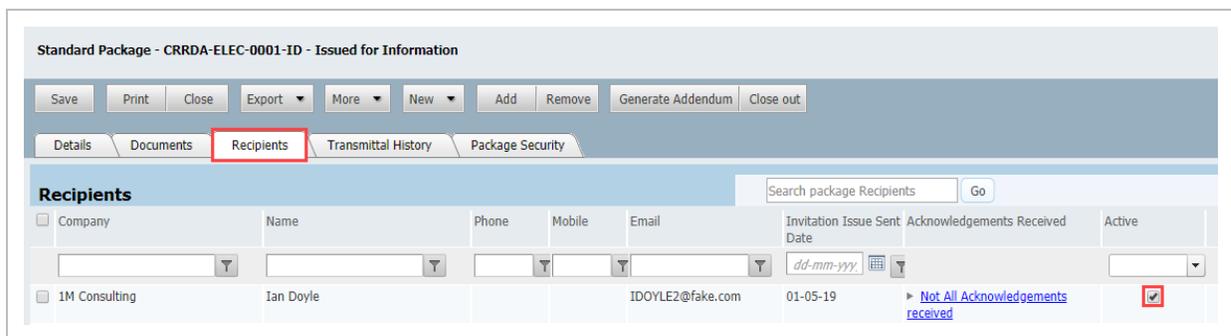
3. This will stop any future addendums being sent to this recipient.

4. Click **Yes** when prompted.
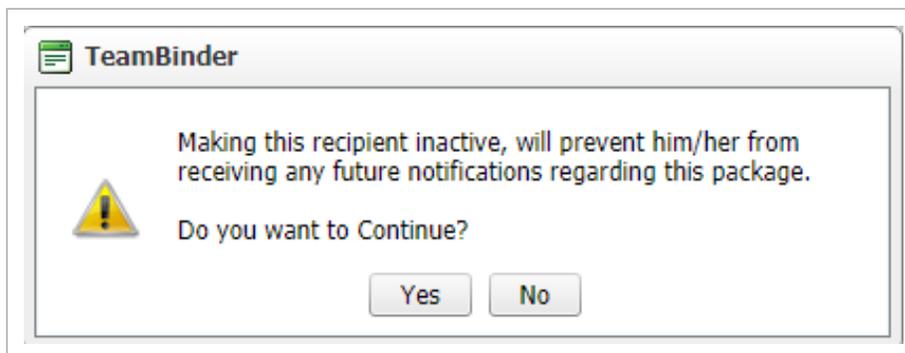
A recipient can be made active again by ticking the **Active** box in the Recipients tab. A prompt will then ask if notifications sent while the recipient was inactive should now be sent through. Choose Yes or No.

4. CLOSING A STANDARD PACKAGE

Closing out a Standard Package will remove a user's access to the package documents.

To close out a Standard Package:

1. Open the Standard Package from **SentItems**.

2. Click the **Close out** button.
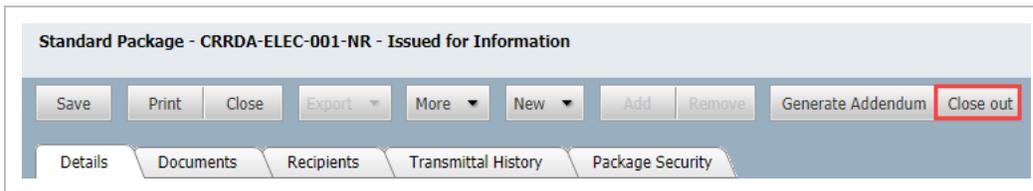
3. At the Close out window enter a **reason** why the package is being closed out.
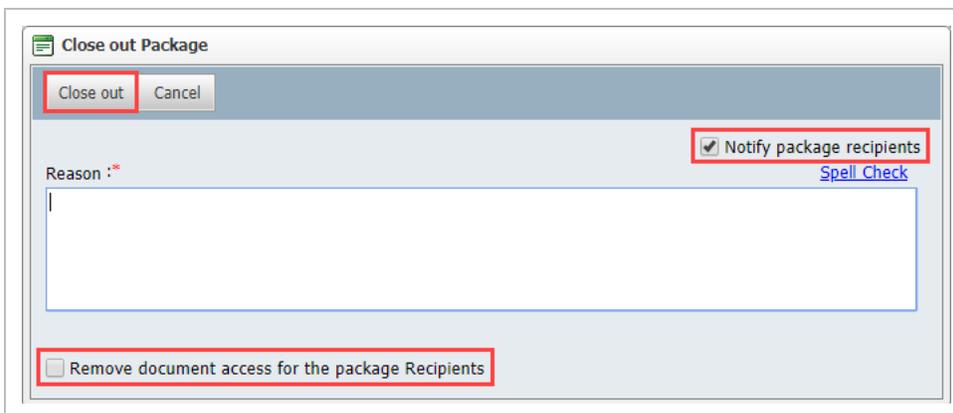
4. The option **Notify package recipients** will be selected.

5. Tick the box to **Remove document access for package recipients**, if required.

6. Click **Close out**.

NOTE	• The Close out option is only available for issued standard packages and to users of the Package originating company that have full access to the Package module
	• Packages that are Closed out cannot be modified.
	• The Closed-Out fields can be added to the package register via the customize option.

5. PACKAGE SECURITY

In addition to user access to packages, it is also possible to define other users within your company to View / Edit the package details. This is useful if you want to restrict access to Standard Packages to only users within a particular department for example.

To define Package level Security:

1. From within the Package details window, click on the **Package Security** tab.

2. Choose between **All users in my company** (the default option) and **Selected users in my company** when allocating users access to the Package.

3. If using **Selected users in my company** use the **Add** and **Remove** buttons to manage users access to the package by selecting View and/or Edit options. The package creator is listed automatically.

4. Click **Save**.

NOTE

- Access to Packages affects package details within both the Drafts and Sent Packages registers.

- Users assigned Edit access in the Package Security tab who have Full access to the Packages module can edit package attributes, documents and recipients and send out package notifications.

6. INCOMING PACKAGES

Standard Packages received within InEight Document are stored in the **Inbox** register under **Packages**. The Package notification is stored as an incoming transmittal in the Transmittals Inbox.

To view Incoming Packages:

1. From the left menu select **Packages** and **Inbox**.
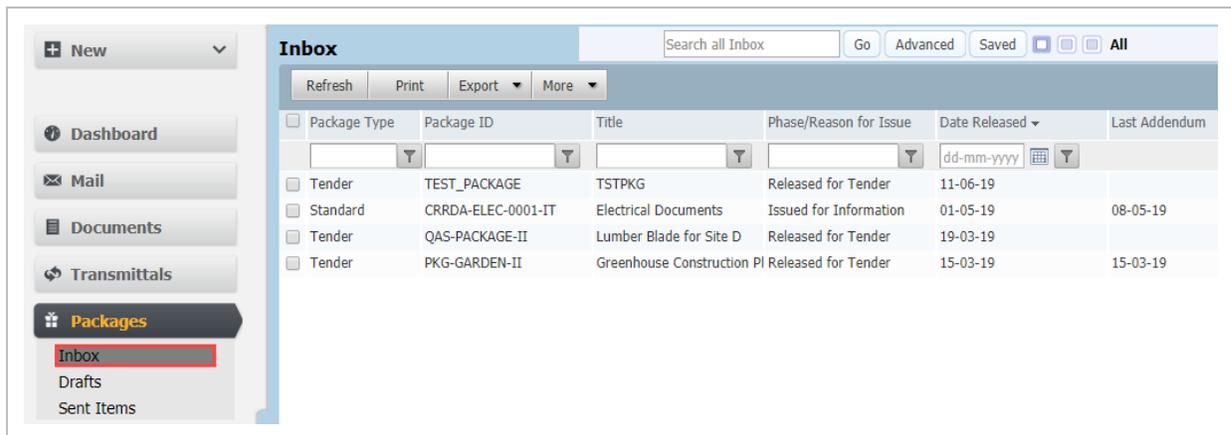
2. To view the details double click to open the package details.

3. From within the Package details window you can:

- **Download documents** – from the Documents tab select one or more documents go to **More**, then **Download**.
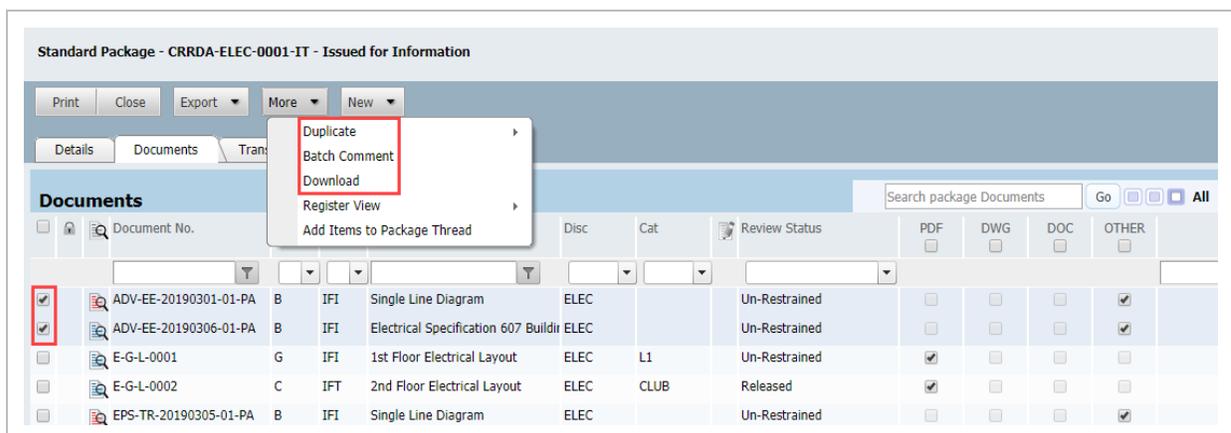
- **Batch comment** – from the Documents tab select one or more documents to add comment to. Go to **More,** then **Batch Comment** and add the comment.

- **Duplicate the Package** – this will create a new package. Go to **More**, then **Duplicate**. When duplicating a package in the Inbox the recipients of the package (which are not displayed in the Inbox) will not be brought forward. However, all documents which the user has full access to will be carried forward.

- **Transmittal History** – this tab will show a history of incoming notifications (transmittals) in relation to the package.
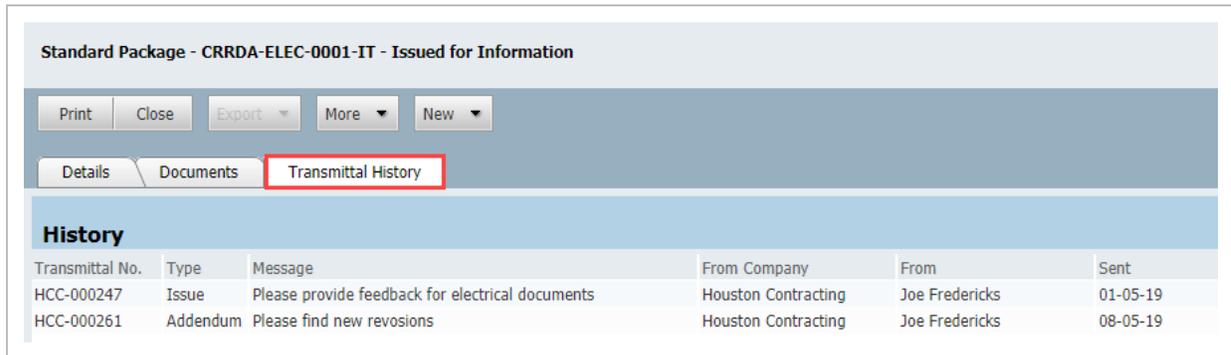
- **Export** is used to export the currently displayed register of packages to Excel.