STANDARD PACKAGES USER GUIDE

DOCUMENT MANAGEMENT



Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

Copyright ©2020 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

Microsoft Windows, Internet Explorer and Microsoft Excel are registered trademarks of Microsoft Corporation.

Although InEight Document has undergone extensive testing, InEight makes no warranty or representation, either express or implied, with respect to this software or documentation, its quality, performance, merchantability, or fitness for purpose. As a result, this software and documentation are licensed "as is", and you, the licensee are assuming the entire risk as to its quality and performance. In no event will InEight be liable for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation.

Release 19.7 Revision: 5 Last Updated: 20 January 2020

CONTENTS

1. STANDARD PACKAGES OVERVIEW	4
2. OUTGOING STANDARD PACKAGES	5
2.1 Creating a Standard Package	5
2.2 Adding Standard Package Documents	7
2.3 Adding Standard Package Recipients	10
2.4 Issuing a Standard Package	11
3. MANAGING STANDARD PACKAGES	13
3.1 Addendums to Packages	13
3.2 Adding additional recipients	17
3.3 Removing or De-activating recipients	19
4. CLOSING A STANDARD PACKAGE	20
5. PACKAGE SECURITY	21
6. INCOMING PACKAGES	23

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**.

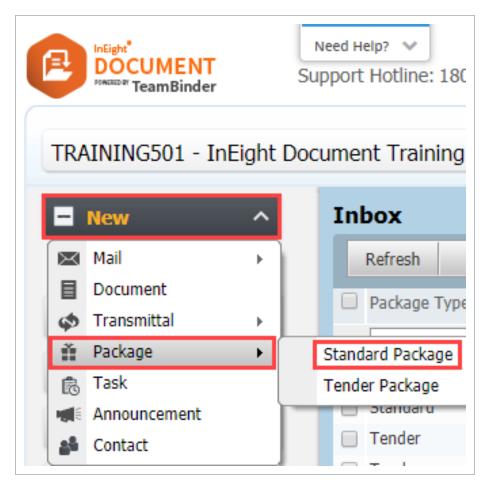
Double click to open, read and amend packages.

2. OUTGOING STANDARD PACKAGES

2.1 Creating a Standard Package	5
2.2 Adding Standard Package Documents	7
2.3 Adding Standard Package Recipients	10
2.4 Issuing a Standard Package	11

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.

New Standard Package				
Save Print	Close Export 💌	More 💌	Add Remove	
Details				
Package ID *:				
Package Title *:				
Trade :	Select a Trade			•
Reason for Issue*	: Select a Reason	for Issue		•
Approx Value :				
Preferred Format	:			
Long Title :				
Details :				
D clairb 1				
Hard Copies of D Company :	ocuments available Fr			
Contact :	Select a compan			
contact i	Select a contact			•
	Schedule	For	recast	
Design Release		O		O
Tender Release		O		O
Tender Close		Ō		Ö
Tender Award		<u>o</u>		O
Start on Site		Ø		7.003
				O

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.

▪ New ✓	Dr	afts		Search all Drafts	Go Advanced Saved	
		Delet	te Refresh	Print Export 💌	More 💌	
Dashboard		Ð	Package Type	Package ID 🔺	Title	Phase/Reason for Issue
			T	T	T	T
🖾 Mail			Tender	12345	Testing Enviroment	Pre Released
B		B 1	Standard	213123312321312	Title	Issued for Information
Documents			Standard	4JP-JP-001	Structural Documents	Issued for Information
Transmittals			Standard	687979798	JP45	Issued for Information
,			Standard	CIVIL-110419	Civil Documents	Issued for Information
🕈 Packages			Tender	CIV-TR-002	Civil Package Area TR	Pre Released
Inbox			Tender	DECMIL01	Test Package AF	Pre Released
Drafts			Tender	DM-TR-001	Architectural Package	Pre Released
Sent Items	_ 0		Tender	ELEC-071019-BB	Electrical Package-BB	Pre Released
🛱 Taska			Tender	EL-GC	Electrical Package - Golf Clubhouse	Prerelease
Tasks	<		Tender	FI-MB	Fire Services Package	Prerelease
B Published Reports			Tender	נננ	j1	Pre Released
		EN	Tondor	1V-COV-01072019	Tender Dackage	Dro Rolossod

2. Click on the **Documents** tab.

Save	Print Close	Export	Mo	re 🔻 Add Remove	Issue Pac	kage				
Detail	ls Documents R	Recipients	Tran	ismittal History Vackage S	ecurity					
Docu	ments					Searc	ch package Documents	Go		
	Q Document No.	Rev	Sts	Title	Disc	Cat	🗊 Review Status	PD	 DOC	OTHER
		T		T		-	•	-		
	01.02.04	С	IFI	Foyer Design Template	ARCH	MAIN	🗊 Un-Restrained			
	030819-001	в	IFI	Site Plan	ELEC		Un-Restrained			
	🙀 04.01.2019-К9	D	IFI	Site Plan	PLU	ATR	Un-Restrained			
	2R-001-RR	А	IFI	site plan	CIV	EXT	Un-Restrained			-
	AA-SREL-DE-0001	4	PD	1st Floor Plan	ARCH	CLUB	🗊 Released Subject to C	Comme 🛛 🗹		

3. Click the Add button, apply any search conditions as required and click Search.

Add Documents			
Register View	Latest Unrestrained	•	
	Documents that I can download	•	
Status	All	•	
Discipline	All	•	
Туре	All	•	
Document No	Contains	2	
Title	Contains	2	
More search options >> Manage Save Clear		Search Cancel	

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.

	Document No. 🔺	Rev	Sts	Title	Disc	Cat	PDF	DWG	DOC	OTHER	
•	A-BPO-112	1	IFI	Floor Plan - 5	ARCH			~			
•	A-BPO-113	1	IFI	Floor Plan - 6	ARCH					~	
•	AB-REVIEW-250919	Α	IFR	AB - Stair Details	ARCH	MAIN	1				
	ACG-E-0001	С	IFI	Floor Plans - Atrium	HYDR	L1					
	ACG-E-0002	В	IFI	Floor Plans - 1st Floor	ARCH	L1					
	A-C-S-0011	Α	IFI	Sections Sheet 1	ARCH	GEN					
H	1 2 3 4 5 6 7 8	►	▶ Pag	ge size: 100 🔻					742 ite	ms in 8 pa	ge

- 5. Click the **OK** button then **OK** again when prompted.
- 6. Repeat to add additional documents.

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.

Standard Package - CIVIL-1	0419 - Issued fo	r Information		
Save Print Close	Export 💌	More 🔻 Add	Remove	Issue Package
Details Documents	Recipients	Transmittal History	Package S	ecurity
Recipients	Search	package Recipients	Go	
Company	Name		Phone	Mobile
	T	T		T
Haslam Construction	Sam Hook			1
Houston Contracting	Joe Freder	icks	+61 7 33	34 4 1
Houston Contracting	John Smith	ı	+61 7 33	34 4 0462 842 94

3. Click the **Add** button.

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

Display: All Contacts Company: Haslam Construct	Contact Groups Read Read Read Read Read Read Read Read	•	
Search all Contac		Go Advanced	View Selecte
Company	First Name 🔺	Last Name	
 Haslam Construction 	Daniel	Hailey	
Haslam Construction	Fred	Bassett	
	ge size: 100 💌		3 items in 1 pages

- 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.

Standard P	ackage - I	CIVIL-1104	19 - Issued fo	r Informatio	n	
Save	Print	Close	Export 💌	More 💌	Add Remove	Issue Package
Details	Docum	nents	Recipients	Transmittal H	istory Package Se	curity

3. Enter a message to the Package Recipients and click Send.

Details Documents Recipients Subject :* Notification of Package Issue. Reason: Issued for Information Request Read Record Message :* Plain Tr Arial • 13px • All • ? • (* • B I U x² × A • (* • • S) 律 評 (*) i = := Ω • ≡ ≡ ■ **	
Aessage :* Plain Ta Arial • 13px • A · P · P · B I 坦 × × A · A · B 译译 。	
Arial • 13px • 為 • ? • P · B I 旦 × × A • ③ • 急 詳 譯 ⊜,	
	<u>ext</u>
Notify users of future revisions with download facility in notification.	

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	13
3.2 Adding additional recipients	17
3.3 Removing or De-activating recipients	19

3.1 ADDENDUMS TO PACKAGES

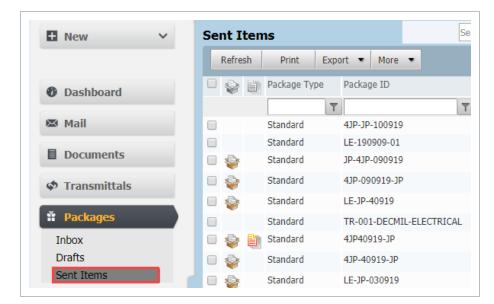
During the phase of a standard package it may be necessary to:

- 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).

Save	2	Print Close Ex	kport 💌	Mor	e 🔻 New 💌 Add	Remove	Generate Add	dendum Close out
Det	ails	Documents Reci	pients	Tran	smittal History 📉 Package Se	curity		
Doc	ume	ents			Search package Documents	Go		I
	Q	Document No.	Rev	Sts	Title	Disc	Cat	🗊 Review Status
		T	-] 🗌 🖣	T	-	-	
		030819-001	В	IFI	Site Plan	ELEC		Un-Restrained
	Q	10092019-DOC-002	Α	IFI	Elec Doc Registration 001	ELEC		Un-Restrained
	Q	10092019-DOC-003	Α	IFI	Elec Doc 003	ELEC		Un-Restrained
	R	ADV-EE-20190301-01-PA	С	IFI	Single Line Diagram	ELEC		Un-Restrained
	Q	ADV-EE-20190306-01-PA	В	IFI	Electrical Specification 607 Build	lir ELEC		Un-Restrained

3. Enter search criteria to assist in locating the documents and click Search.

	Pagistar View	Latest Unrestrained	•	- 1
	Register view.	Latest Officialited		- 1
		Documents that I can download	•	
	Status:	All	-	
	Discipline:	All	•	
	Туре:	All	•	1
	Document No:	Contains	2	
	Title:	Contains	2	
More search	<u>h options >></u>			

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.

	Document No. 🔺	Rev	Sts	Title	Disc	Cat	PDF	DWG	DOC	OTHER	
1	A-BPO-112	1	IFI	Floor Plan - 5	ARCH			√			
1	A-BPO-113	1	IFI	Floor Plan - 6	ARCH						
1	AB-REVIEW-250919	Α	IFR	AB - Stair Details	ARCH	MAIN					
	ACG-E-0001	С	IFI	Floor Plans - Atrium	HYDR	L1					
	ACG-E-0002	В	IFI	Floor Plans - 1st Floor	ARCH	L1					
	A-C-S-0011	Α	IFI	Sections Sheet 1	ARCH	GEN					
I	< < 1 2 3 4 5 6 7 8		▶ Pa	ge size: 100 🔻					742 ite	ms in 8 pa	ge

5. Select the documents to be added to the Standard Package and click **OK**. You will be prompted to send out the **Addendum**.

🗐 Team	Binder
	The selected documents have been added successfully. Do you want to send an addendum with the new documents now?
	Yes No

- 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.

Send	Cancel Attach	Files Preview					
Details	Documents	Recipients					
ubject :* No	tification of Addendu	m to Package				Request	Read Recei
eason :*							<u>Plain Tex</u>
Arial	▼ 13px	• #1 *7 • (* •	BI	<u>I</u> x ² X ₂	x + ⊗ + §) 🛊 🛊 🖏	
i≡ i≡ C	2·≣≣≣∎	ABC					
essage :*							<u>Plain Tex</u>
Arial		- #1 *7 - (* -	BI	$\mathbf{I} = \mathbf{X}^2 \times \mathbf{X}_2$	\ ▼ (ð) ▼ (§		
i≣ ⊞ IΩ	2・⋿⋷⋷∎∎	ABC					

- 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.

Save Print Clo	se E	kport ▼ More ▼	Add	Remove	Issue Packa	age	
Details Documents	Reci	pients Transmitta	History	Package Se	curity		
Recipients		Search package Re	cipients	Go			
Company		Name		Phone	Mobile	Email	
	T		T		T	T	
Haslam Construction		Sam Hook			1	dsc@madeup	oaddress.co
Houston Contracting		Joe Fredericks		+61 7 3384	41	jfredericks@l	hcc.c0m
Houston Contracting		John Smith		+61 7 3384	4 0462 842	941 JOhn@fake.c	om
							•

3. Select the Recipient Company and contact and click **OK** when done.

Display:	All Contacts () Contact Groups 🔵 Roles		
Company:	Haslam Constructio	on 🔻		
	Search all Contacts		Go Advanced	View Selecte
Compa	ny	First Name 🔺	Last Name	
🕑 Haslam	Construction	Daniel	Hailey	
🕑 Haslam	Construction	Fred	Bassett	
	1 🕨 🕅 Page	e size: 100 💌		3 items in 1 pages
Items Sel	ected: 2			OK Cancel

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.

Initial issue and all previous Addendums for this Package will be sent to selected recipients.
 Send the notifications with today's date. Send the notifications with original release/addendum date.
Yes No

5. Click **Yes** to confirm that the Recipient(s) should be added to the notifications being sent.

3.3 REMOVING OR DE-ACTIVATING RECIPIENTS

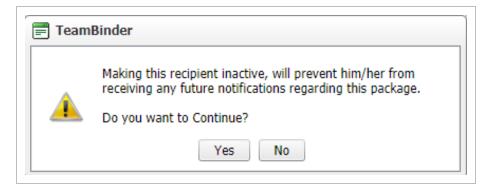
Recipients can only be removed or deleted from a Standard Package if the package has not yet been issued. Once a Standard Package has been issued, recipients can be made in-active within the Standard Package. This will ensure they will not receive any further notifications such as Addendums.

To de-activate recipients:

- 1. Open the Standard Package from Sent Items.
- Click the Recipients tab and locate the Recipient to be removed. Un-tick the Active tick box located to the right.

Save Print Clos	e Export 💌 More 💌	New TAdd Remo	Generate Addendum Clo	lose out	
Details Documents	Recipients Transmittal	History Package Security			
Recipients				Search package Recipients Go	
-	Name	Phone Mob		Search package Recipients Go Invitation Issue Sent Acknowledgements Received Date	Active
Recipients Company	Name	Phone Mob	ile Email	Invitation Issue Sent Acknowledgements Received	Active

- 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.

Standard Pa	ckage - CRRDA-E	LEC-001-NR - J	issued for Information		
Save	Print Close	Export 💌	More 💌 New 💌	Add Remove	Generate Addendum Close out
Details	Documents	Recipients	Transmittal History	Package Security	

3. At the Close out window enter a **reason** why the package is being closed out.

E Close out Package	
Close out Cancel	
Reason :**	✓ Notify package recipients <u>Spell Check</u>
Remove document access for the package Recipients	

- 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.
- 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.

	ipients Transmittal History Package Security	ove Generate Addendum Clo	se out
ecurity	,		
essible by All users in my company Selected users in my company			Add Remo
First Name 🔺	Last Name		Edit
Joe	Fredericks	ø	A

- 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.

• 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**.

	Refresh P	rint Export 💌 More	•			
Dashboard	Package Type	Package ID	Title	Phase/Reason for Issue	Date Released 🗸	Last Addendu
		T	T	T	dd-mm-yyyy 🎹 🍸	
🖾 Mail	Tender	TEST_PACKAGE	TSTPKG	Released for Tender	11-06-19	
	Standard	CRRDA-ELEC-0001-IT	Electrical Documents	Issued for Information	01-05-19	08-05-19
Documents	Tender	QAS-PACKAGE-II	Lumber Blade for Site D	Released for Tender	19-03-19	
🗢 Transmittals	Tender	PKG-GARDEN-II	Greenhouse Construction I	Pl Released for Tender	15-03-19	15-03-19
×						
Packages						
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**.

Prin	t Close Expor	t • 1	More		Ne	w 💌									
Det		Tran		Du; Bat	olicate ch Com	iment									
Doc	uments				wnload jister V						Se	earch packa	je Docume	nts	Go 🔲 🗖
	Document No.	l	_	Add	l Items	to Package Thread	Disc	Cat	V	Review Status		PDF	DWG	DOC	OTHER
		T		•	•	T		•	•		•				
•	ADV-EE-2019030	1-01-PA	В		IFI	Single Line Diagram	ELEC			Un-Restrained					
•	ADV-EE-2019030	5-01-PA	в		IFI	Electrical Specification 607 Bui	ldir ELEC			Un-Restrained					
	🔁 E-G-L-0001		G		IFI	1st Floor Electrical Layout	ELEC	L1		Un-Restrained		•			
	E-G-L-0002		с		IFT	2nd Floor Electrical Layout	ELEC	CLUB		Released					

• **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.

Print Cl	ose Expo	nt Vew Transmittal History			
		() () () () () () () () () ()			
History		Message	From Company	From	Sent
	Туре		From Company Houston Contracting	From Joe Fredericks	Sent 01-05-19

• **Export** is used to export the currently displayed register of packages to Excel.

Standard	Package -	CRRDA-ELEC-	0001-IT - I	ssued for In							
Print	Close	Export 👻	More 💌	New 💌							
Details	Excel Details Documents Transmittal History										