

Instructions:

The User Preferences Notifications matrix provides information about each notification setting to help you determine which notifications to enable for your project team. The matrix is organized by the modules in Document (for example, Mail, Document, Transmittal, Package). Each row in the matrix represents a notification setting and matches the same list within User preferences > Notifications.

Notification #	Notification	Recipients					Who Is Notified	Trigger	Optional
	SYSTEM	User requesting notification					Who Is Notified	Trigger	Optional
System-001	Change in Communication Matrix	x					To nominated user from the company for which the communication matrix is updated	When the company's communication register is updated	Yes
System-002	Completion of Form Register Export	x					To the user requesting an export of the forms register (where it exceeds given limits)	When the export is completed	Yes
System-003	Upcoming InEight Document Update Reminder	x					To the user wanting a reminder on updates	3 weeks before the server is updated	Yes
	MAIL MODULE	Sender of the mail	Recipient of the mail	Originator	Mail Reviewer	User affected due to mail access	Who Is Notified	Trigger	Optional
Mail-001	InEight Document Read Receipt	x					Sender of Mail Item	When Request Read Receipt is selected when sending a Mail Item	Yes
Mail-002	Auto processing of Mail			x			Originator of Mail Item (Source Project)	When a Mail Item is successfully processed and sent as Mail Item via Data Transfer Tool	Configurable
Mail-003	Auto Responder	x					Originator of Mail Item	When Auto-Responder has been enabled	Yes
Mail-004	Automatic Mail Status Reminder	x	x				Originator/Recipient of Mail Item	When Automatic prompting of Reminders are set in user Preferences	Yes
Mail-005	Change of User Preference						User who's preferences have been changed	When an Administrator has changed someone's user Preferences	Yes
Mail-006	Completion of Mail Review			x			Draftee of Mail Item	When Mail has been reviewed	Yes
Mail-007	Failed auto processing of Mail			x			Originator of Mail Item (Source Project)	When a Mail Item is unsuccessfully processed via Data Transfer Tool	Configurable
Mail-008	Failure to Auto-process Unregistered Mail						If user has access to the unregistered mail box / access to the mail, then will be notified of the failure when selecting the option to be notified	When autoprocessing of a mail fails	Yes
Mail-009	Live mail(s) with status outstanding		x				Recipient of Mail Item	When Mail Item is flagged as outstanding	Yes
Mail-010	Mail Cancellation		x				Recipient of Mail Item	When a mail is cancelled by the originator/ Company users/ Administrators	Yes
Mail-011	Mail Issued for Review				x		Reviewer of Mail Item	When Mail is sent to user for Review	Yes
Mail-012	Mail Returned from Review	x					Draftee of Mail Item	When a Mail is sent back to you from your Reviewee	Yes
Mail-013	New company unregistered mail in InEight Document						Any User with Access to Company Un-Reg Mail Access	Upon Delivery of new Mail into the UnReg mail Box	Yes
Mail-014	New department un-registered mail in InEight Document						Any User with Access to Department Un-Reg Mail Access	Upon Delivery of new Mail into the UnReg mail Box	Yes
Mail-015	New Mail		x				Recipient of Mail Item	Upon Delivery of new Mail into Inbox	Yes
Mail-016	New personal un-registered mail in InEight Document		x				Any User with Access to Personal Un-Reg Mail Access	Upon Delivery of new Mail into the UnReg mail Box	Yes
Mail-017	New response for live mail		x				Anyone involved in Live mail Thread	When there is a reply to a Live Mail Item	Yes
Mail-018	New response for your live mail	x					Originator of Mail Item	When there is a reply to a Live Mail Item	Yes
Mail-019	Overdue response for live mail		x				Recipient of Live Mail	When There is an Overdue Response required by you for a Live Mail Thread.	Yes
Mail-020	Overdue response for your live mail	x					Originator of Mail Item	When there is an Overdue Reponses to one of your Live Mail Threads.	Yes
Mail-021	Successful Processing of Incoming Email as a Document in InEight Document						Processor of Mail Item	When a Mail Item is processed as a Document from Mail	Yes
Mail-022	Successful Processing of Incoming Email as InEight Document Mail	x					Processor of Mail Item	When a Mail Item is processed and sent as Mail Item (Processed Unregistered Mail)	Yes
	DOCUMENT MODULE	Review Coordinator	Administrator	Originator	Reviewers	User Affected	Who Is Notified	Trigger	Optional
Doc-001	Auto Responder for Document Review	x					Review Co-Ordinator	When a Document is sent for Review to a User who has an Auto Responder Activated	Configurable

Doc-002	Automatic Review of Restrained Document(s) issued for Review				x		Reviewers	When a reviewer is no longer required to review a document (Optional or Either reviewer)	No
Doc-003	Automatic Reviewed Documents Release					x	Review Co-Ordinator	When a Document is automatically Released from Review.	No
Doc-004	Bluebeam consolidation failure	x					To administrator	Where the consolidation of comments, redlines has failed	No
Doc-005	Bluebeam studio session cancellation	x	x				To the reviewer / administrator	When the Bluebeam studio session is cancelled	No
Doc-006	Completed Review process	x					Review Co-Ordinator	When a Document has completed its Review Process	No
Doc-007	Delay In document(s) release process	x	x				Review Co-Ordinator	When a Document Release time has exceeded the required Release time as defined by the Discipline	Configurable
Doc-023	Delay in document(s) review process				x		Reviewer	When a Reviewer has exceeded their allocated Review Time	No
Doc-008	Delay in document(s) review process	x					Review Co-Ordinator	When a Reviewer has exceeded their allocated Review Time	No
Doc-009	Document Comments	x		x	x		Originator, Document Recipients, Review Workflow Members	When a Document is Released from Review	Yes
Doc-010	Document(s) Deletion					x	Users with Access to Document	When an Administrator has deleted a Document from the Register	Yes
Doc-011	Issue for Bluebeam Studio Session Review							This notification is no longer used. Was required for a feature that generated studio session from the document register that is no longer supported. This notification type should be removed from the user preferences as well.	
Doc-012	Granted Document Access					x	Recipient	Upon Granting of Document Access	No
Doc-013	Inactive Bluebeam Studio Session Reviews	x					Review Coordinator	When a Bluebeam session reaches 60 days of inactivity	Yes
Doc-014	Rejected Hold Document	x					User who created hold Document	When a user rejected the document.	No
Doc-015	Rejection of uploaded Document(s)	x					Originator	When a Document is Rejected from the Review Workflow	Yes
Doc-016	Release for uploaded Documents	x		x		x	Originator	When a Document is Released from Review Workflow	Yes
Doc-017	Restrained Document(s) issue	x					Review Coordinator	When a Document is uploaded into a workflow	No
Doc-018	Restrained Document(s) issue				x		Review Initiator	When a Document is uploaded into a manual workflow	No
Doc-019	Restrained Document(s) issue (For Discipline matrix users)						Discipline Distribution Matrix Recipients	When a Restrained Document has been added into the Document Register.	Yes
Doc-020	Restrained Document(s) issue for Release	x	x				Review Co-Ordinator, Administrator	When a has finished its Review Workflow and is ready for Release	No
Doc-021	Restrained Document(s) issue for Review				x		Review Workflow Members	When a Document is ready for Review	No
Doc-022	Restricted document workflow action	x			x	x	Review Initiator/ Review workflow members	When create a restrained document with restricted attributes/after complete the review	No
Doc-023	Reviewed Documents Release (same as TBDoc-013)					x	Discipline Distribution Matrix Recipients	When a Reviewed Document has been Released	No
Doc-024	Signature Completion			x			To the user requesting a document gets signed (sent for signature)	When the signature process is completed	Yes
Doc-025	Signature Failure			x			To the user requesting a document gets signed (sent for signature)	When the signature process fails	Yes
Doc-026	Superseded Document(s) Release						Discipline Distribution Matrix Recipients	When a Superseded Document has been added into the Document Register.	No
Doc-027	Un-Restrained Document(s) Release						Discipline Distribution Matrix Recipients	When a Un-Restrained Document has been added into the Document Register.	No
Doc-028	Un-successful upload of Documents to InEight Document			x			Originator	When a Document is unsuccessfully Uploaded into TeamBinder via XL-Upload	No
Doc-029	View File Replacement			x			Originator, Users with access to Document	When a View File is replaced on a Document	No
Doc-030	Verification of successful upload of Document(s) to InEight Document			x			Originator	When Documents are Uploaded via XI-Upload.	No.
Doc-031	Notification of mention in Document comments					x	Mentioned user	When a user is mentioned in a comment	No

	TRANSMITTAL MODULE	Sender	Recipient	Originator	Reviewers		Who Is Notified	Trigger	Optional
Trans-001	Auto Responder for Transmittals	x					Sender of Transmittal	When a Transmittal is sent to a User who has an Autoresponder Activated	Configurable
Trans-002	Completion of Transmittal Review			x	x		Reviewers and the originator of Transmittal	When Transmittal has been reviewed	Yes
Trans-003	Transmittal Cancellation		x				Recipient of Transmittal	When a Transmittal is Cancelled	Yes
Trans-004	Transmittal Issued for Review				x		Reviewer of Transmittal	When transmittal send for Review	No
Trans-005	Transmittal Returned from Review				x		Reviewer of Transmittal	When reviewer assign the originator as the next reviewer	No
	PACKAGE MODULE	Recipient	Originator				Who Is Notified	xTrigger	Optional
Pkgs-001	Change of Package Information	x					Recipient of Package	When the MetaData of a Package is changed	No
Pkgs-002	Package bulk edit actions	x					Sender of the package, recipients will be an optional notification (prompted)	When change package details is used	Yes
Pkgs-003	Tender Package - Change in Access		x				Package creator	When a package recipient tries to send mails through Tenderdocs without having access to communicate with the recipients in the selected Mail type	No
	TASK MODULE	Assigner	Recipient				Who Is Notified	Trigger	Optional
Tasks-001	Auto Responder for Tasks (unable to produce)	x					Assigner of Task	When a Task is assigned to someone with an Auto-Responder set in their User Preferences	Yes
Tasks-002	Automatic Task Status Reminder		x				Recipient of Task	When Automatic Task Status Reminders are turned on	Yes
Tasks-003	New Task		x				Recipient of Task	When a Task is assigned to a User.	Yes
Tasks-004	Reassigned Tasks		x				Re-assign recipient of Task	When a Task is re-assign to the user	Yes
Tasks-005	Task Cancelling		x				Recipient of Task	When a Task is cancelled by User	Yes
Tasks-006	Task Change		x				Recipient of Task	When a Tasks Details are changed.	Yes
Tasks-007	Task Completion	x					Recipient of Task	When a Task is set as Completed by User	Yes
Tasks-008	Task Deletion		x				Recipient of Task	When a Task is deleted.	Yes
Tasks-009	Task Ownership Change	x					Assigner of Task	When Task Ower is changed	Yes
Tasks-010	Task Recipient Change	x	x				Assigner of Task Recipient of Task	When Task Recipient is changed	Yes
Tasks-011	Task Send Out	x					Assigner of Task	When Task is sent out	Yes
Tasks-012	Task Assigned		x				Re-added recipient of Task	When recipient add to the existing sent task	Yes
	ADDRESS BOOK MODULE	Administrator	User				Who Is Notified	Trigger	Optional
Addr-001	New Contact created in InEight Document	x					Administrator	When a new Contact is Created by someone other than the Primary Administrator	Yes
	FORMS MODULE	Originator	Recipient				Who Is Notified	Trigger	Optional
Form-001	Change of Form Information		x				Recipient of Form	When a Form information has been changed.	Yes
Form-002	Delay in form(s) Review Process		x				For Action Recipients Only (In the Current Step)	Every X days after due date (Configured via the form workflow)	Yes
Form-003	Form Cancellation		x				Recipient of Form	When Form getting canceled.	Yes
Form-004	Form Issued	x					Recipient of Form	When a user creates new form and complete action.	Yes
Form-005	Form Status Change		x				Recipients added to the Status Distribution for the form type.	When a Forms status changed	Yes

Form-006	Form(s) Comments	x	x			Originator\Recipient of Form	When a user adds a new comment.	Yes
Form-007	Forms Closed		x			Recipient of Form	When form is Closed Out	Yes
Form-008	Upcoming Outstanding form(s) Reviews		x			For Action Recipients Only (In the Current Step)	X days before due date (Configured via the form workflow)	Yes
	CHECKLIST MODULE	Originator	Recipient	Verify Person		Who Is Notified	Trigger	Optional
Check-001	Notification of Checklist Action Overdue		x			For Action Recipient of the Checklist	When there is an Overdue Action required by you for a Checklist	Yes
Check-002	Checklist Completion	x				Originator of Checklist	When a recipient complete the checklist.	Yes
Check-003	Checklist Issue		x			For Action Recipient of the Checklist	When a checklist is received	Yes
Check-004	Checklist Verification Required			x		Verify person of the checklist	When a recipient complete the checklist.	Yes
Check-005	Reactivation of Checklist	x	x			For Action users For Information users Verifier Initiator (if the user reactivating is not the initiator of the checklist)	When reactivate checklist is used	Yes
	GALLERY MODULE	Originator	Recipient	User with access		Who Is Notified	Trigger	Optional
Gallery-001	New Project Gallery Item Upload	x		x		Any User who had access to the uploaded image(s)	When an image is uploaded	Yes
Gallery-002	Project Gallery Access Grant		x			User who is getting access to images	When assign image access	Yes
Gallery-003	Project Gallery Item Deletion	x		x		Any User who had access to the uploaded image(s)	When an image is deleted	Yes
Gallery-004	Project Gallery Item(s) issue for Release		x			Review Coordinator	After reviewer complete the review.	Yes
Gallery-005	Project Gallery Item(s) issue for Review		x			Reviewer	When an image/images send for review	Yes
Gallery-006	Project Gallery Item(s) Reviewed and Released			x		Any User who had access to the released/ reject image(s)	After complete the workflow	Yes
	DEFECTS MODULE	Originator	Recipient			Who Is Notified	Trigger	Optional
DEF-001	New Defect	x				Defect Originator	When Defect Originator creates a New Defect	Yes
	SUBMITTALS MODULE	Submittal Manager	Recipient			Who Is Notified	Trigger	Optional
SUB-001	Delay in submittal(s) review process	x				Submittal Reviewer	When a Reviewer has exceeded their allocated Review Tim	Yes
SUB-002	Overdue Submittal milestone date	x	x			Submittal manager Issued to Recipients	If the current date is passed a Submittal's Scheduled Milestone date and not marked as complete	Yes
SUB-003	Reminder for Submittal milestone date	x				Submittal Manager	User defines X days when the users will be notified and not marked as complete	Yes
SUB-004	Submittal Cancellation		x			Issued to Recipeints	When cancelling an in progress submittal	Yes
SUB-005	Submittal(s) Review		x			Submittal reviewer	When a submittal is ready for their review	Yes
SUB-006	Upcoming Submittal(s) review		x			Submittal reviewer	User defines X days when the users will be notified and not marked as complete	Yes
	LOTS MODULE	Originator	Recipient			Who Is Notified	Trigger	Optional
LOT-001	Lot Status Change	x	x			Users assigned to the Lot Security	When there is a Status Change	Yes