
**ADMINISTRATION
USER GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – ACCESSING PROJECT SETTINGS

For information on Accessing Project Settings, see the links below.

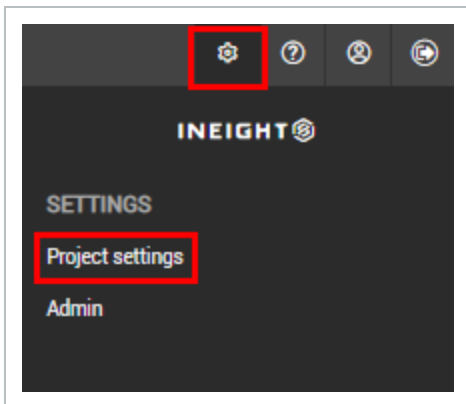
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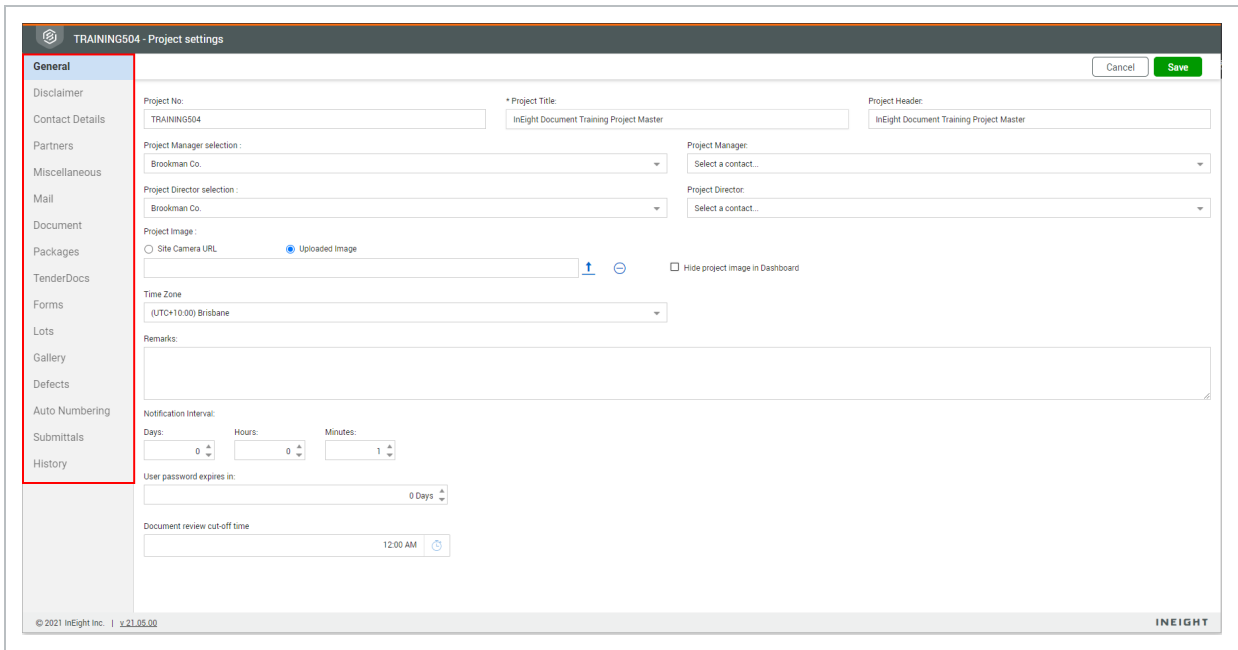
1.1 PROJECT SETTINGS

1.1.1 To access project settings:

1. Click the **cogwheel icon** and select **Project Settings**.

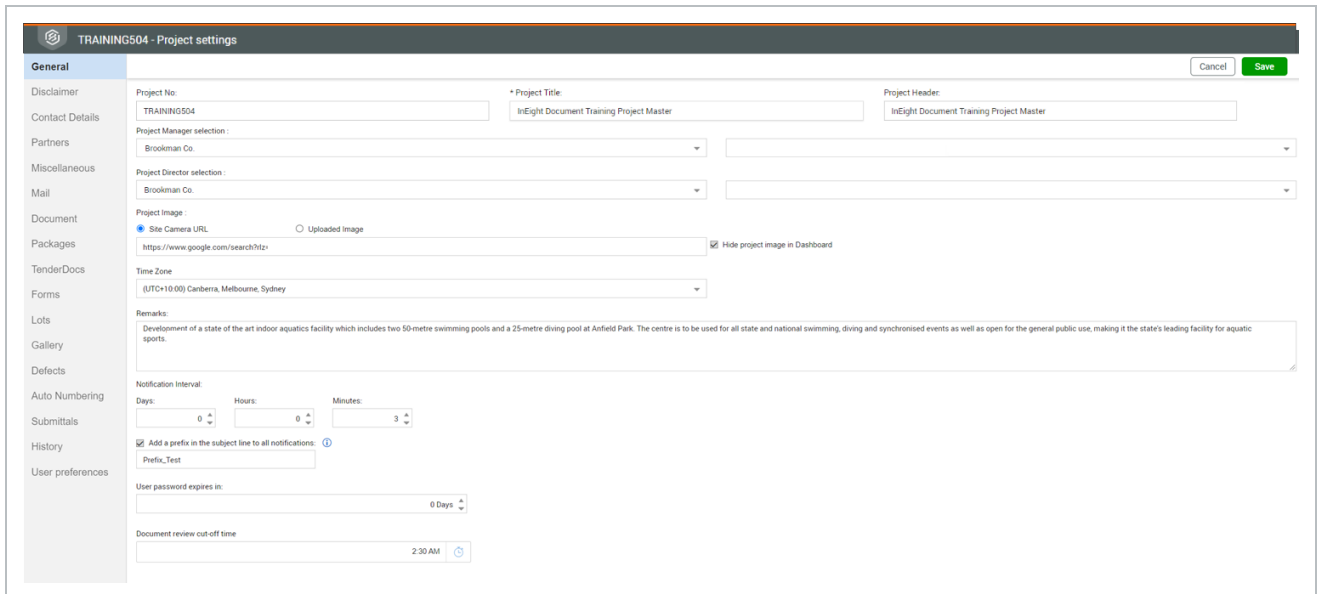


2. Select a module from the left menu.



1.2 GENERAL SETTINGS

Once a project has been created, some of the project settings can be modified by administrators when needed. General settings can be found by clicking the **General** tab in project settings.



1.2.1 See the table below for a description of each setting:

Setting	Description
Project No	The project number can be any combination of letters and numbers up to a maximum of 12 characters. If the Project No needs to be changed, please contact InEight Support.
Project Title	The title of the project.
Project Header	The text that appears in the title bar of the project.
Project Manager selection	The Project Manager of the hosting company.
Project Director selection	The Project Director of the hosting company.
Project Image	The static image displayed on the Dashboard (if selected).
Time Zone	The selected time zone for the project which is used to date and stamp all items
Remarks	The text that appears under the project summary on the Dashboard.
Notification Interval	Select the days, hours and minutes for the frequency at which the system will send email notifications relating to each event type in InEight Document. For example, if you were to receive 10 mail items over one hour, you would receive one email notifying you of all 10 mail items.
Add a prefix in the subject line to all notifications	Lets you add a prefix, that you can specify in the field below, to all notifications from the project. The prefix is not applied to custom notifications.
User password expires in	Select the number of days after which users will be asked to change their password.
Document	Select the cut-off time for reviews.

Setting	Description
review cut-off time	

1.3 DISCLAIMER SETTINGS

Disclaimer settings can be found by clicking the **Disclaimer** tab in project settings.

The screenshot shows the 'TRAININGS04 - Project settings' window. The 'Disclaimer' tab is selected in the left sidebar. The main area contains:

- Download disclaimer:** A large text input field.
- Log on disclaimer:** A scrollable text area containing the following text:

Before accessing this system, you must agree to comply with Queensland Government, the Transport Portfolio and your relevant departments (if you are not a Transport Portfolio employee or agent) Policies, Standards and Code of Conduct.

Important elements of these include:

 - You are responsible for all activities performed under your user ID. Your activities are logged and monitored and are stored for future reference.
 - You must keep your password secure. Do not share it with anyone else.
 - You must not perform inappropriate or illegal activities using this system.
- Display log on disclaimer when logging into this project

Buttons for 'Cancel' and 'Save' are visible in the top right corner. The footer shows '© 2021 InEight Inc. | v.21.05.00' and the 'INEIGHT' logo.

1.3.1 See the table below for a description of each setting:

Setting	Description
Download disclaimer	Enter a privacy message that will appear when users first download documents from InEight Document. The disclaimer is shown again to users if it is changed.
Logon disclaimer	Enter a disclaimer notice that will be shown to users when they first log in 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.

Setting	Description
Display logon disclaimer when logging into this project	Select whether to display the logon disclaimer when users log into the project.

1.4 CONTACT DETAILS SETTINGS

Contact details settings can be found by clicking the **Contact Details** tab in project settings.

The screenshot shows the 'Contact Details' tab selected in the 'Project settings' for 'TRAININGS04'. The sidebar on the left lists various settings categories: General, Disclaimer, Contact Details (selected), Partners, Miscellaneous, Mail, Document, Packages, TenderDocs, Forms, Lots, Gallery, Defects, Auto Numbering, Submittals, and History. The main content area contains the following fields:

- Company: Select a company...
- Address 1: [Text input]
- Address 2: [Text input]
- City: [Text input]
- State: [Text input]
- Post code: [Text input]
- Country: Select a country... (dropdown)
- Phone: [Text input]
- Fax: [Text input]
- Mobile: [Text input]
- Business Reg No: [Text input]
- Email: jf@jf.com
- Website: [Text input]
- District: [Text input]

Buttons for 'Cancel' and 'Save' are located at the top right of the form area. The footer of the interface shows '© 2021 InEight Inc. | v.21.05.00' and the 'INEIGHT' logo.

1.5 PARTNERS SETTINGS

Partners Settings can be found by clicking the **Partners** tab in project settings.

See the table below for a description of each setting:

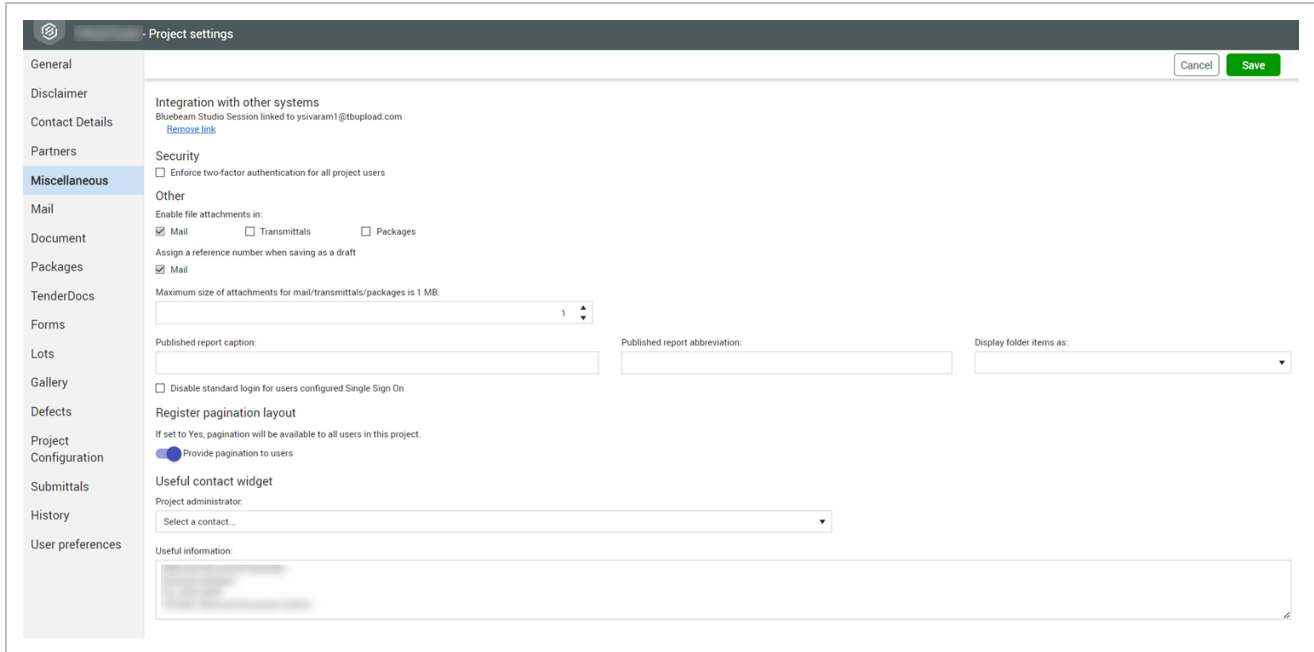
Setting	Description
Client	The primary client of the project.
Architect	The primary architect of the project.
Prime Contractor	The primary prime contractor of the project.
Engineering Consultant	The primary engineering consultant of the project.
Quality Surveyor	The primary quality surveyor of the project.

For each setting, you can set the following:

- Company.
- Contract.
- Contract number.

1.6 MISCELLANEOUS SETTINGS

Miscellaneous settings can be found by clicking the **Miscellaneous** tab in project settings.



See the tables below for a description of each setting.

1.6.1 Security

Setting	Description
Enforce two-factor authentication for all project users	Used to force all users on the project to use two-factor authentication when they sign in to Document.

1.6.2 Integration with other systems

Setting	Description
Integration with other systems	Used to indicate whether the project has been integrated with other external systems such as Bluebeam. The service account for the Bluebeam Studio Session is included, so you can unlink the service account used to set up the integration for the project. Click Remove link to unlink the Bluebeam service account.

1.6.3 Other

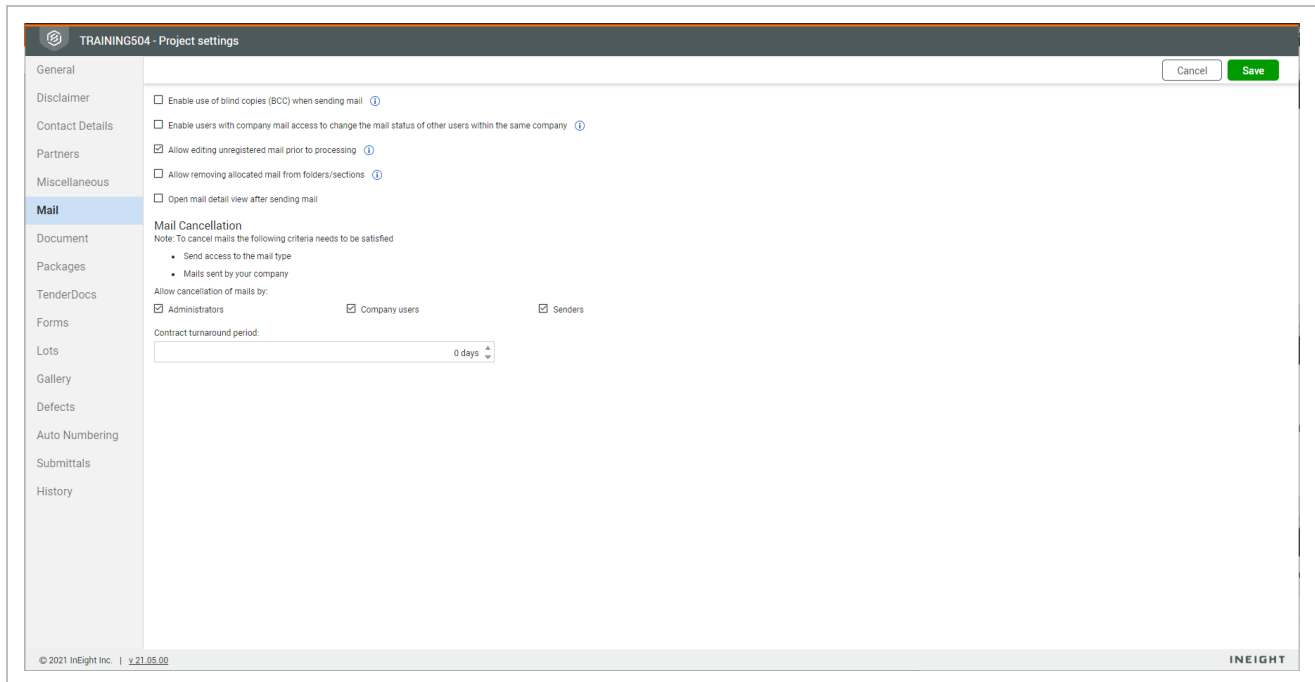
Setting	Description
Enable file attachments in <ul style="list-style-type: none"> • Mail • Transmittals • Packages 	Used to allow attachments to be added to mail, transmittals and packages.
Attach Comment Spreadsheet to Transmittal	When transmitting documents to a company for review, it is possible to attach a generic comment spreadsheet to the transmittal. This can then be used to import comments to the Document Register.
Assign a reference number when saving as a draft	Gives projects the flexibility to save a draft mail with or without a formal reference number. When the Mail check box is selected, each mail saved uses the project's mail numbering system when it is saved. When the check box is not selected, each mail is saved using a draft number, for example, DRAFT-INEIGHT-00001, instead of the formal reference number. The project's numbering is assigned only when the mail is sent.
Maximum size of attachments for mail/transmittal/packages is <i>n</i> MB	Used to set the maximum file size in MB for mail, transmittal and package attachments. If the attachments exceed the maximum file size, they are sent as links to external contacts.
Published report caption	Enter an alternative caption for published reports.
Published report abbreviation	Enter an alternative abbreviation for published reports.
Display folder items as	Choose how to display folders in folder view.
Disable standard login for users configured Single Sign On	Select this option to prevent registered single sign on (SSO) users from logging in with standard document credentials.

1.6.4 Useful contact widget

Setting	Description
Project administrator	By default, the Project Administrator in the Useful contact tile is populated with the Primary Administrator. If necessary, you can identify a separate Project Administrator. The Project Administrator is displayed on the dashboard in the Useful contact tile.
Useful information	Additional information can be entered, that may be useful for project users. This will be displayed on the Dashboard in the Useful Contact tile.

1.7 MAIL SETTINGS

Mail settings can be found by clicking the **Mail** tab in project settings.



See the table below for a description of each setting:

1.7.1 General

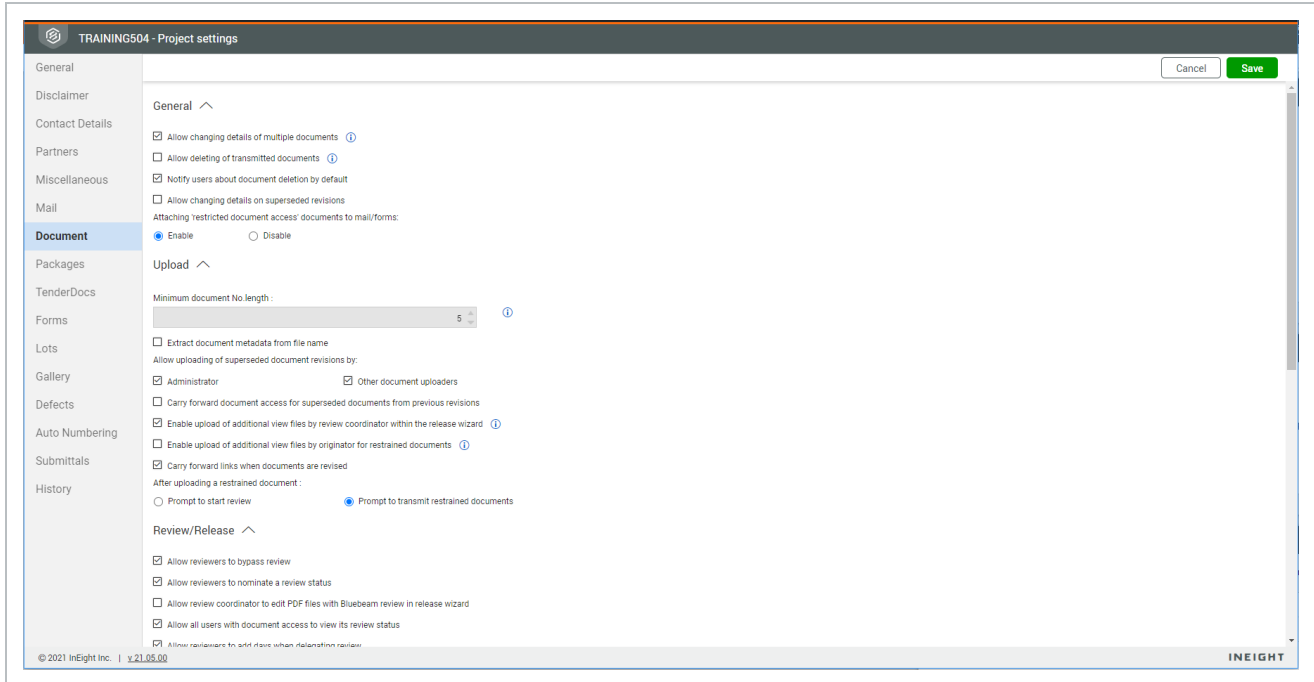
Setting	Description
Enable use of Blind Copies (BCC) when sending mail	Select whether blind carbon copies (BCC) can be used when sending mail.
Enable the changing of the status of mail of any user within a company by a user of the same company with Company mail access	This option enables a user with company access to mail to change the status of the mail of any user within the same company.
Allow editing un-registered mails prior to processing	This option enables unregistered mails to be edited prior to processing.
Allow removing allocated mails from Folders/Sections	This option allows allocated mail to be removed from folders/sections.
Open mail detail view after sending mail	Select this option to automatically display sent mail details after sending the mail.

1.7.2 Mail Cancellation

Setting	Description
Allow cancellation of mails by <ul style="list-style-type: none"> • Administrator • Company users • Senders 	Use this option to control who can cancel mail. The options are administrators, company users and senders.
Contract turnaround period	Define the contract turn around period by days. This will be able to be determined for each mail type when configuring the mail workflow.

1.8 DOCUMENT SETTINGS

Document settings can be found by clicking on the **Document** tab in project settings.



See below for a description of each setting:

1.8.1 General Document Settings

Setting	Description
Allow changing details of multiple documents	This option enables users with relevant access to be able to change the details of documents in bulk.
Allow deleting of transmitted documents	This option enables documents to be deleted even if they have been included on transmittals.
Notify users about document deletion by default	This option enables a notification to be sent to users when a document is deleted. This can be changed upon deletion of documents.
Allow changing details on superseded revisions	This option enables users with relevant access to be able to change the details on superseded revisions of documents
Attaching restricted document access documents to mail/forms	This option enables users to attach documents with restricted access to mail or forms.
Default file format to view first	Specifies the file format that is shown first in the viewer when multiple files are associated to the document.

1.8.2 Upload Document Settings

Setting	Description
Minimum document No. length	The minimum document length field is used when validating document uploads.
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. The format can be configured in the Configuration Tables.
Enable OCR PDF's on document upload	Enable this option to automatically apply optical character recognition (OCR) to PDF documents after they have been uploaded. When enabled, a batch process runs every 15 minutes and applies OCR, so users do not have to do this in outside applications.
Allow uploading of superseded document revisions by <ul style="list-style-type: none"> Administrator Other document uploaders 	This option needs to be enabled for administrators and/or other document uploaders to be able to upload superseded revisions of documents.
Carry forward document access for superseded documents from previous revision	Enable this option if access to documents uploaded as superseded are to be carried forward from the previous revision.
Enable upload of additional View files by Review Coordinator within the release wizard	This option enables the review coordinator to upload additional view files to a document as part of the document release process.
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.
Carry forward links	The uploader is given the option to maintain the existing links to view

Setting	Description
when documents are revised	files when the document is revised.
Carry forward link to submittal when revised via document register	This option enables a document that is revised from the Document register to show as revised in any submittal that includes the document.
After uploading a restrained document <ul style="list-style-type: none"> • Prompt to start review • Prompt to transmit restrained documents 	Once a restrained document has been uploaded, choose whether the prompt will ask to start the review or transmit the documents.

1.8.3 Review/Release Document Settings

Setting	Description
Allow Review Initiator/Administrator to Release and/or Reject documents prior to workflow activation <ul style="list-style-type: none"> • Release • Reject 	The Review Initiator can release or reject a restrained document without activating a workflow.
Allow reviewers to bypass review	Allows reviewers in a workflow to bypass remaining reviewers and go straight to the Review Coordinator if this option is enabled and 'Can send to Review Coordinator bypassing other reviews' is enabled in the Review Team defaults.
Allow reviewers to nominate a review status	A reviewer can suggest a review status when completing the review process.

Setting	Description
Allow Review Coordinator 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 Coordinator to control document releases	This option shows a Completed column with a check 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.
Do not allow users to complete review in TeamBinder if a Studio Session review is in progress	This option will remove the “Completed” checkbox from the Review window when documents are under review within a Bluebeam Studio Session. Users will be required to complete their review within Bluebeam Studio by selecting Finished as the status.
Allow reviewers to add days when delegating review	This option specifies whether reviewers can add days to the review cycle when adding a parallel reviewer. Select the box if you want to allow reviewers to add days. When not selected, reviewers cannot add days to the overall current sequence.
Recalculate Review Coordinator's release required date	Lets you specify whether to recalculate the review coordinator's time when review teams take less than the allotted time to finish their reviews. You can choose to recalculate always, recalculate only if overdue, or never recalculate. If you choose to recalculate the date, the date is calculated based on the review coordinator's defined settings. If you choose not to recalculate, the extra days remaining from the document reviewers are added to the review coordinator's due date.

1.8.4 Vendor Data Review (only available if Vendor data is enabled).

Setting	Description
Allow superseding documents under review when processing Holding Area documents	This option allows users to upload documents that may supersede documents that are currently under review.
Assign the review status as	This will determine the Review Status for the superseded document that is automatically released when the new revision is uploaded.
Allow Deliverable Line Item Status to be auto updated	This option will determine whether the Deliverable Line Item status should be auto updated when a document is linked to the Deliverable.
Released status as:	This will determine the Deliverable Line Item status when a document is linked to the deliverable.
Rejected status as:	This will determine the Deliverable Line Item status when a document is linked to the deliverable.

1.8.5 Comment Document Settings

Setting	Description
Send comments to: <ul style="list-style-type: none"> • Originator • Reviewers • Review Coordinator • Document Recipients 	Use this option to choose who receives notification when comments are made on documents.
Include reviewer comments when releasing documents	During the release of documents, this option will select all comments and redlines by default on the document release screen.
Notify reviewers about other reviewer comments on review completion	This option means that reviewers who have already completed their review will be notified if subsequent reviewers make comments.
Allow comment 'raised by' to update comment	This option allows the user specified in the 'Raised by' comment to update comment attributes and close out the comment even if

Setting	Description
attributes and closeout comment	they were not the user who entered the comment.
Allow closing out of document comments made 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 responses to Closed-Out comments	This option enables responses to be added to comments that have already been closed-out.
Enable redlining and comments after document review workflow completion	This enables the ongoing redlining 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	This enables the ability to redline and comment documents that are uploaded as unrestrained and did not go through a formal review.
Enable redlining on restrained documents	This option is used to enable the ability to redline mark-up during a review.

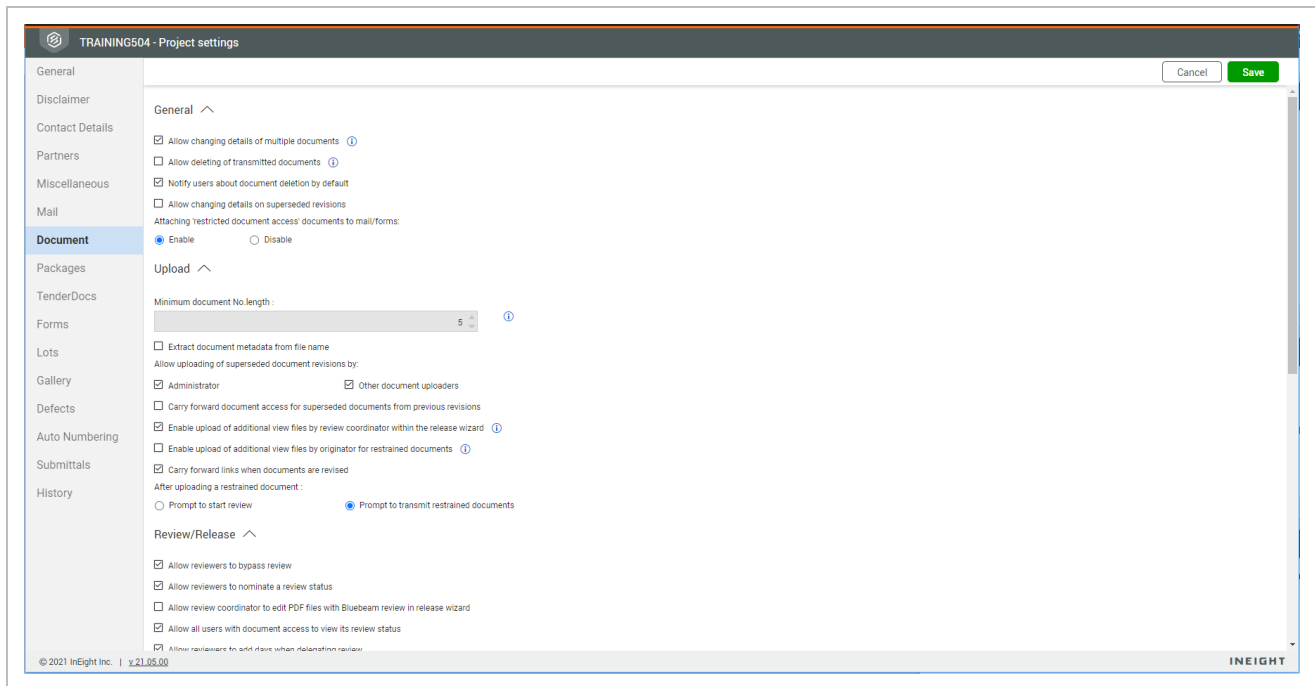
1.8.6 Distributions Document Settings

Setting	Description
Enable transmitting rejected documents to all users	This option enables the transmittal of rejected documents to any user. If not selected, transmitting of rejected documents is limited to only users that currently have access to the document.
Enable transmitting review documents to all users	This option allows documents that are currently restrained to be transmitted to any user. If not selected, transmitting of restrained documents is limited to only the users that currently have access to the document or are members of the review workflow team.
Respond to transmittals within _ business days	This is the default number of working days used to calculate the respond by date for transmittals based on the current date + number of days defined here.

Setting	Description
Send automatic notifications to setup distribution group	If an unrestrained document is uploaded to an attribute 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 distribution groups	If enabled, when a person is added to a distribution group, the notify box will be ticked by default.
Document download expires in _ business days (Notifications)	The value entered in this field will determine how long users have to download the document after the email notification is sent. This does not affect Transmittals.

1.9 DOCUMENT SETTINGS

Document settings can be found by clicking on the **Document** tab in project settings.



See below for a description of each setting:

1.9.1 General Document Settings

Setting	Description
Allow changing details of multiple documents	This option enables users with relevant access to be able to change the details of documents in bulk.
Allow deleting of transmitted documents	This option enables documents to be deleted even if they have been included on transmittals.
Notify users about document deletion by default	This option enables a notification to be sent to users when a document is deleted. This can be changed upon deletion of documents.
Allow changing details on superseded revisions	This option enables users with relevant access to be able to change the details on superseded revisions of documents.
Attaching restricted document access documents to mail/forms	This option enables users to attach documents with restricted access to mail or forms.
Default file format to view first	Specifies the file format that is shown first in the viewer when multiple files are associated to the document.

1.9.2 Upload Document Settings

Setting	Description
Minimum document No. length	The minimum document length field is used when validating document uploads.
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. The format can be configured in the Configuration Tables.
Enable OCR PDF's on document upload	Enable this option to automatically apply optical character recognition (OCR) to PDF documents after they have been uploaded. When enabled, a batch process runs every 15 minutes and applies OCR, so users do not have to do this in outside applications.
Allow uploading of superseded document revisions by <ul style="list-style-type: none"> Administrator Other document uploaders 	This option needs to be enabled for administrators and/or other document uploaders to be able to upload superseded revisions of documents.
Carry forward document access for superseded documents from previous revision	Enable this option if access to documents uploaded as superseded are to be carried forward from the previous revision.
Enable upload of additional View files by Review Coordinator within the release wizard	This option enables the review coordinator to upload additional view files to a document as part of the document release process.
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.

Setting	Description
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.
After uploading a restrained document <ul style="list-style-type: none"> Prompt to start review Prompt to transmit restrained documents 	Once a restrained document has been uploaded, choose whether the prompt will ask to start the review or transmit the documents.

1.9.3 Review/Release Document Settings

Setting	Description
Allow Review Initiator/Administrator to Release and/or Reject documents prior to workflow activation <ul style="list-style-type: none"> Release Reject 	The Review Initiator can release or reject a restrained document without activating a workflow.
Allow reviewers to bypass review	Allows reviewers in a workflow to bypass remaining reviewers and go straight to the Review Coordinator if this option is enabled and 'Can send to Review Coordinator bypassing other reviews' is enabled in the Review Team defaults.
Allow reviewers to nominate a review status	A reviewer can suggest a review status when completing the review process.
Allow Review Coordinator to edit PDF files with	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

Setting	Description
Bluebeam review in Release wizard	InEight.
Show completed column in Release wizard to allow Review Coordinator to control document releases	This option shows a Completed column with a check 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.
Do not allow users to complete review in TeamBinder if a Studio Session review is in progress	This option will remove the “Completed” checkbox from the Review window when documents are under review within a Bluebeam Studio Session. Users will be required to complete their review within Bluebeam Studio by selecting Finished as the status.
Allow reviewers to add days when delegating review	This option specifies whether reviewers can add days to the review cycle when adding a parallel reviewer. Select the box if you want to allow reviewers to add days. When not selected, reviewers cannot add days to the overall current sequence.
Recalculate Review Coordinator's release required date	Lets you specify whether to recalculate the review coordinator's time when review teams take less than the allotted time to finish their reviews. You can choose to recalculate always, recalculate only if overdue, or never recalculate. If you choose to recalculate the date, the date is calculated based on the review coordinator's defined settings. If you choose not to recalculate, the extra days remaining from the document reviewers are added to the review coordinator's due date.

1.9.4 Vendor Data Review (only available if Vendor data is enabled).

Setting	Description
Allow superseding documents under review when processing	This option allows users to upload documents that may supersede documents that are currently under review.

Setting	Description
Holding Area documents	
Assign the review status as	This will determine the Review Status for the superseded document that is automatically released when the new revision is uploaded.
Allow Deliverable Line Item Status to be auto updated	This option will determine whether the Deliverable Line Item status should be auto updated when a document is linked to the Deliverable.
Released status as:	This will determine the Deliverable Line Item status when a document is linked to the deliverable.
Rejected status as:	This will determine the Deliverable Line Item status when a document is linked to the deliverable.

1.9.5 Comment Document Settings

Setting	Description
Send comments to: <ul style="list-style-type: none"> • Originator • Reviewers • Review Coordinator • Document Recipients 	Use this option to choose who receives notification when comments are made on documents.
Include reviewer comments when releasing documents	During the release of documents, this option will select all comments and redlines by default on the document release screen.
Notify reviewers about other reviewer comments on review completion	This option means that reviewers who have already completed their review will be notified if subsequent reviewers make comments.
Allow comment 'raised by' to update comment attributes and closeout comment	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.
Allow closing out of	This option allows any user able to view comments relating to a

Setting	Description
document comments made by other users	document to close out the comments of any other user in relation to the same document.
Allow responses to Closed-Out comments	This option enables responses to be added to comments that have already been closed-out.
Enable redlining and comments after document review workflow completion	This enables the ongoing redlining 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	This enables the ability to redline and comment documents that are uploaded as unrestrained and did not go through a formal review.
Enable redlining on restrained documents	This option is used to enable the ability to redline mark-up during a review.

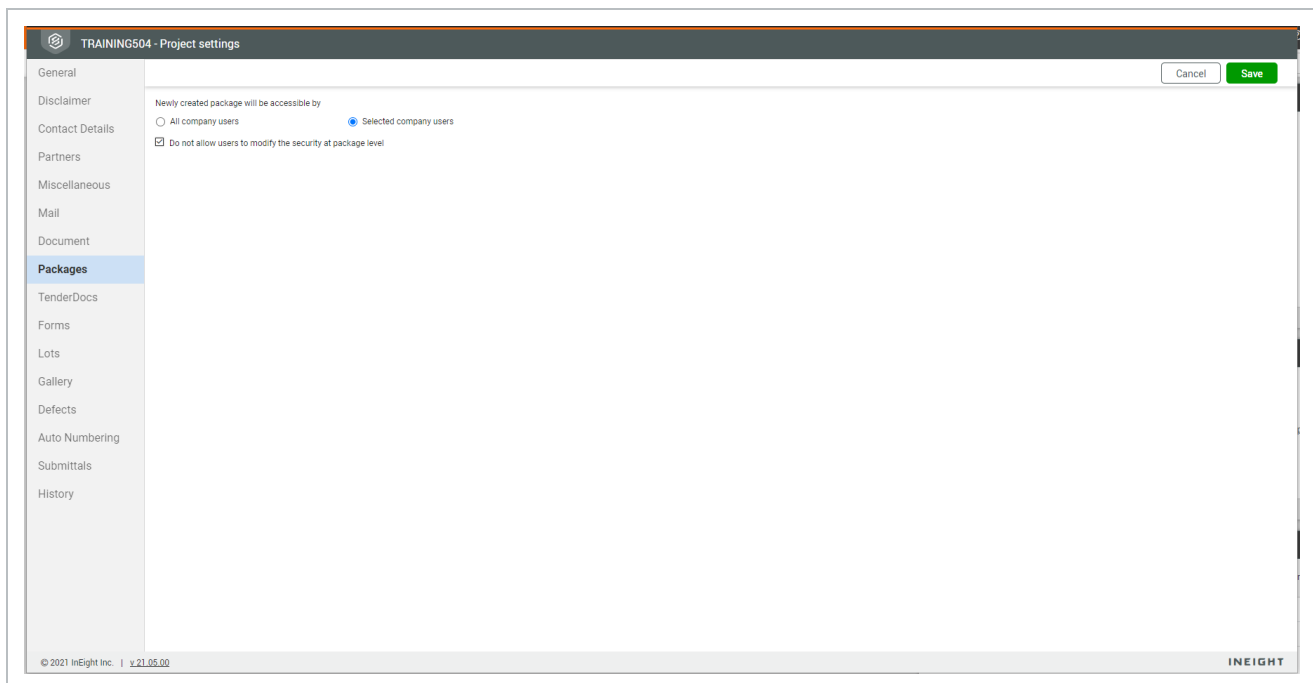
1.9.6 Distributions Document Settings

Setting	Description
Enable transmitting rejected documents to all users	This option enables the transmittal of rejected documents to any user. If not selected, transmitting of rejected documents is limited to only users that currently have access to the document.
Enable transmitting review documents to all users	This option allows documents that are currently restrained to be transmitted to any user. If not selected, transmitting of restrained documents is limited to only the users that currently have access to the document or are members of the review workflow team.
Respond to transmittals within _ business days	This is the default number of working days used to calculate the respond by date for transmittals based on the current date + number of days defined here.
Send automatic notifications to	If an unrestrained document is uploaded to an attribute that is not related to any distribution rule, an automatic email notification will be sent to the

Setting	Description
setup distribution group	project administrator.
Enable “Notify” option when adding new users to distribution groups	If enabled, when a person is added to a distribution group, the notify box will be ticked by default.
Document download expires in _business days (Notifications)	The value entered in this field will determine how long users have to download the document after the email notification is sent. This does not affect Transmittals.

1.10 PACKAGES SETTINGS

Packages settings can be found by clicking on the **Packages** tab in project settings.

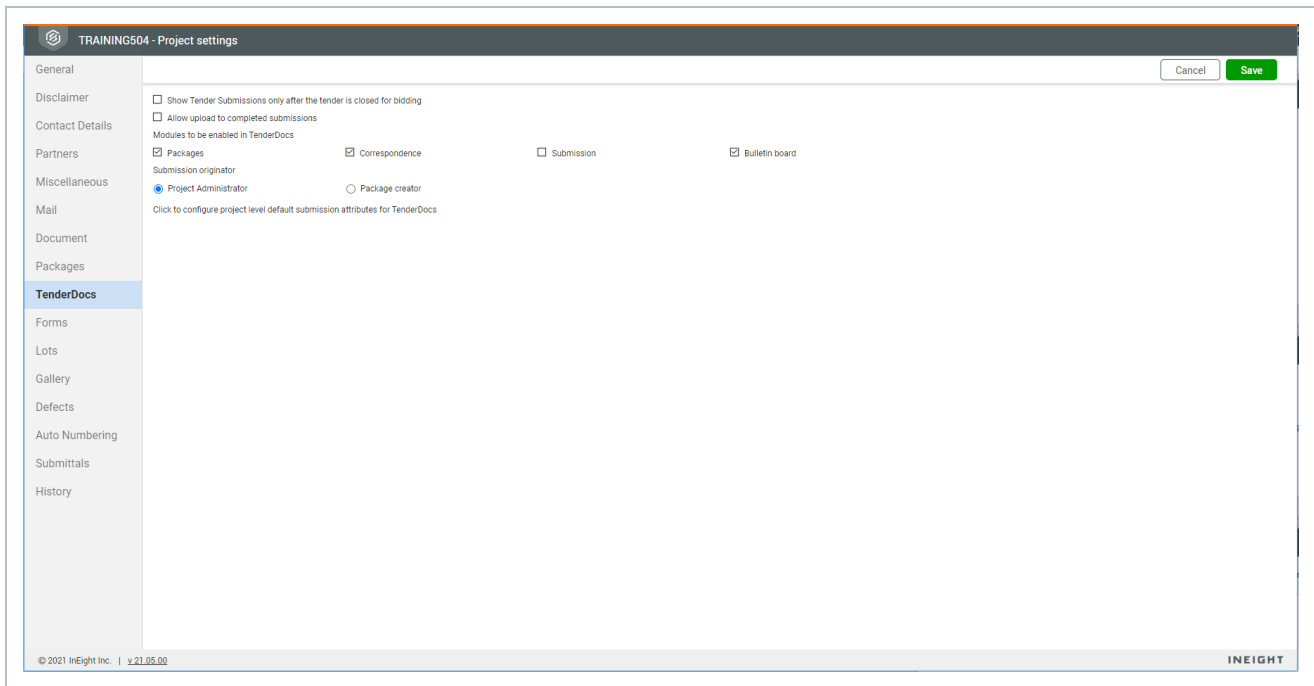


See the table below for a description of each setting:

Setting	Description
<p>Newly created packages will be accessible by:</p> <ul style="list-style-type: none"> • All company users • Selected company users 	<p>Choose whether newly created packages are accessible by all company users or selected company users. The selected users can be nominated within the Package Security settings.</p>
<p>Do not allow users to modify the Security at Package level</p>	<p>Choose whether to prevent users from modifying the security of a package at package level.</p>

1.11 TENDERDOCS SETTINGS

TenderDocs settings can be found by clicking on the **TenderDocs** tab in project settings.



See the table below for a description of each setting:

Setting	Description
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 complete submissions	Enables tenderers to upload additional documents to their submissions even after they have marked their submission as complete.
Modules to be enabled in TenderDocs <ul style="list-style-type: none"> • Package • Correspondence • Submission • Bulletin board 	Select which modules should be enabled by the TenderDocs portal.
Submission originator <ul style="list-style-type: none"> • Project Administrator • Package Creator 	Use this option to define whether the submission document originator is either the project administrator or the package creator.

1.12 FORMS SETTINGS

Forms settings can be found by clicking the **Forms** tab in project settings.

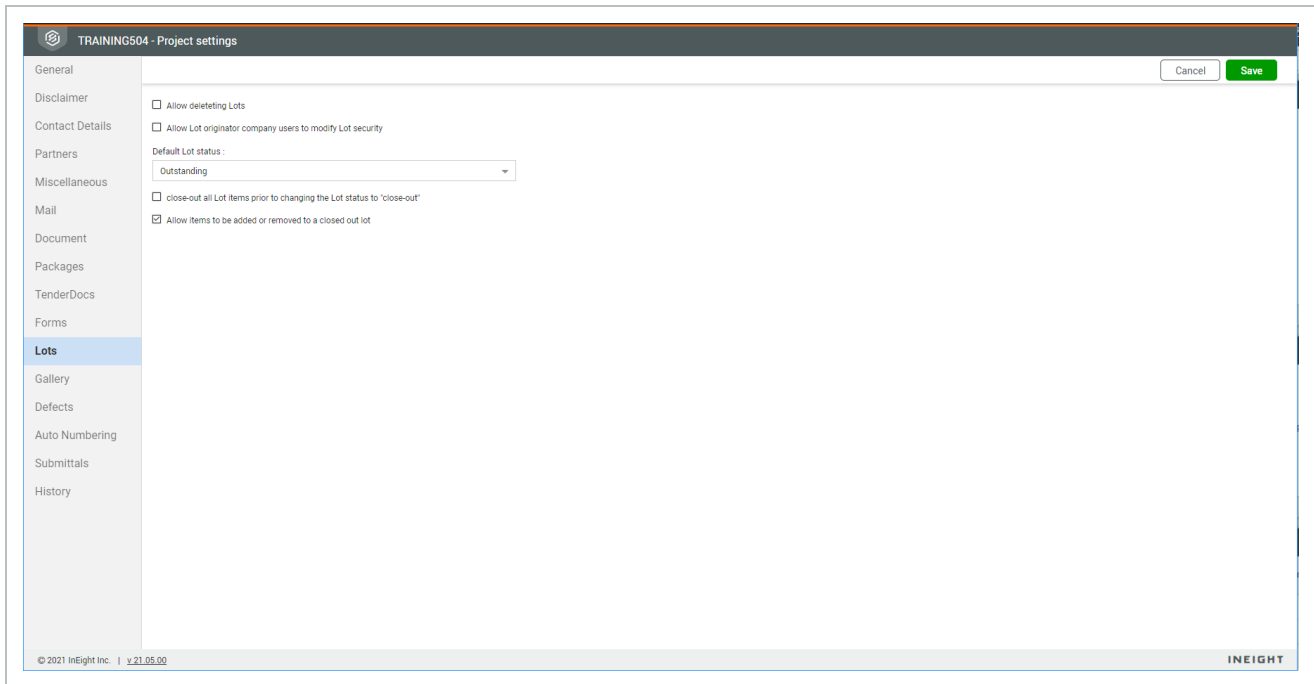
The screenshot displays the 'Forms' settings page within the 'TRAINING504 - Project settings' interface. The left sidebar lists various settings categories, with 'Forms' highlighted. The main content area is titled 'Cancelling forms' and 'Reactivating forms'. Under 'Cancelling forms', there are three checkboxes: 'Administrators' (unchecked), 'Company users' (unchecked), and 'Initiators' (unchecked). Under 'Reactivating forms', there are three checkboxes: 'Administrators' (checked), 'Initiators' (checked), 'Allow closing out of form comments made by other users' (unchecked), and 'Allow responses to closed out comments' (unchecked). At the top right, there are 'Cancel' and 'Save' buttons. The footer shows '© 2021 InEight Inc. | v.21.05.00' and the 'INEIGHT' logo.

See the table below for a description of each setting:

Setting	Description
Allow cancellation of forms by: <ul style="list-style-type: none"> Administrators Company users Initiators 	Choose who has access to cancel forms.
Allow closing out of form comments made by other users	Choose whether users can close out comments made by other users.
Allow responses to Closed-Out comments	Choose whether responses can be made to closed-out comments.

1.13 LOTS SETTINGS

Lots settings can be found by clicking the **Lots** tab in project settings.

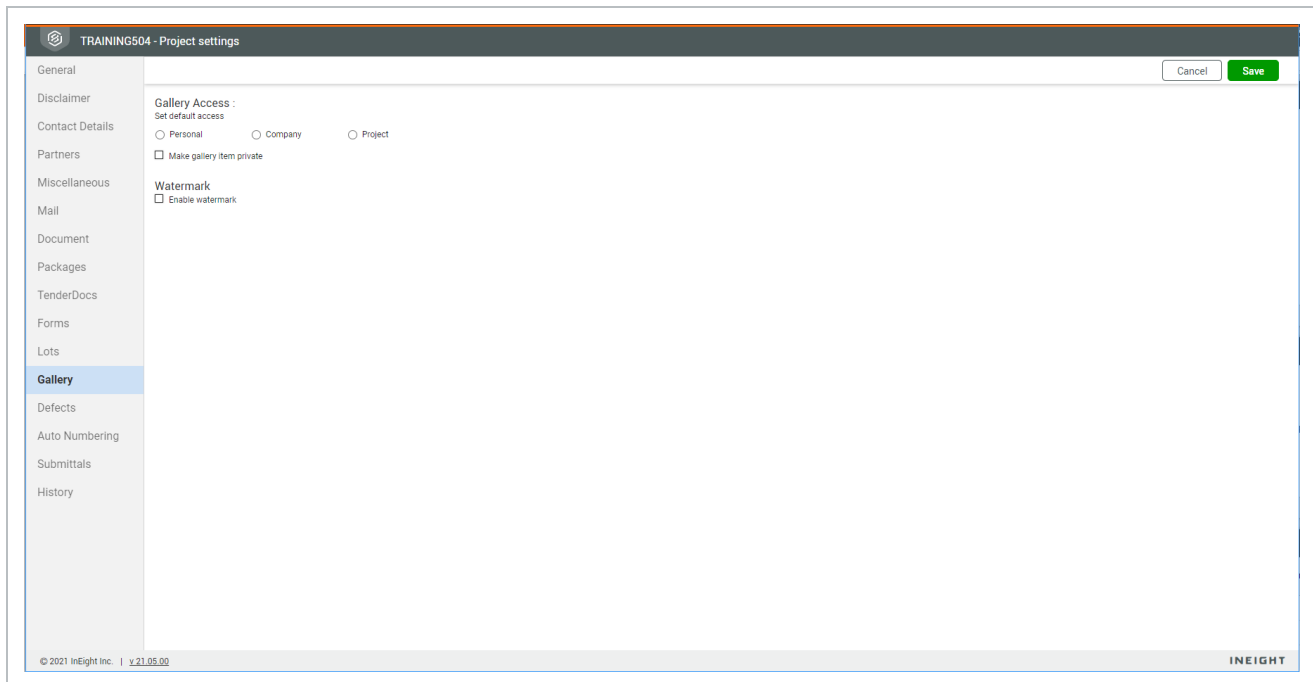


See the table below for a description of each setting:

Setting	Description
Allow deleting Lots	Choose whether lots can be deleted.
Allow Lot originator company users to modify Lot security	Choose whether users of the originating company of the lot can modify lot security.
Default lot status	Choose the default status for lots.
Close-out all Lot items prior to changing the Lot status to “Close-out”	Choose whether the items of the lot need to be closed out before the lot status can be changed to closed out.
Allow item to be added or removed to a closed out lot	Choose whether items can be added to a lot that has been closed out.
Allow editing Lot details when the status is closed out	Choose whether lot details can be edited when the status is <i>Closed out</i> .

1.14 GALLERY SETTINGS

Gallery settings can be found by clicking the **Gallery** tab in project settings.



See the table below for a description of each setting:

1.14.1 Gallery Access

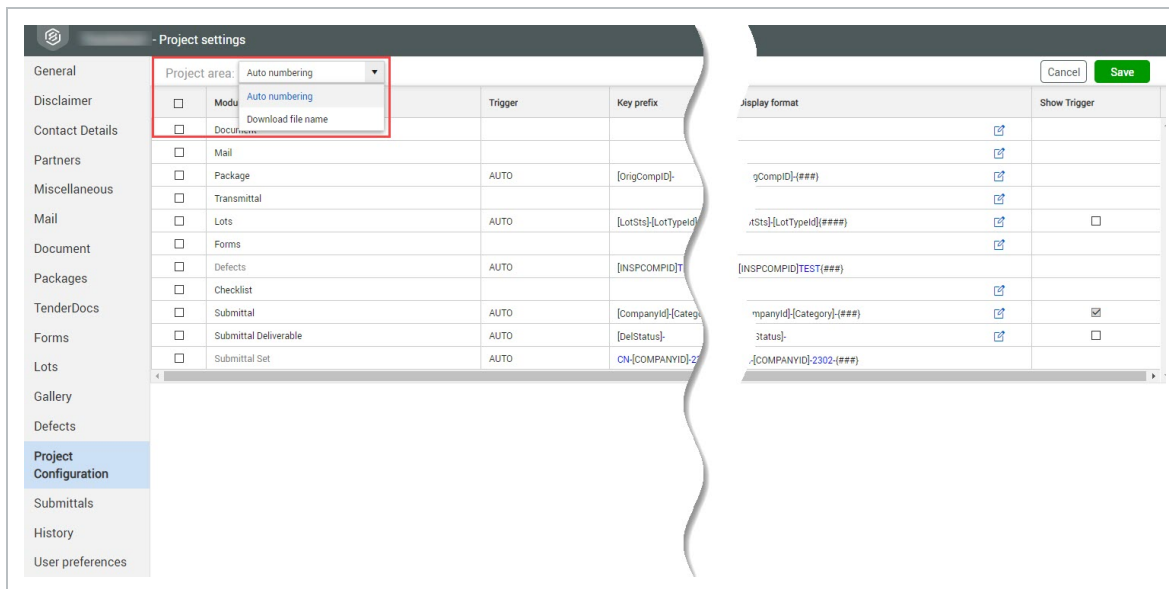
Setting	Description
Set default access: <ul style="list-style-type: none"> • Personal • Company • Project 	This option determines the default view when a user accesses the gallery module.
Make gallery item private	Choose whether the gallery items are private.

1.14.2 Watermark

Setting	Description
Enable watermark	Choose whether to add a watermark to gallery items upon upload.
Watermark text	This option allows you to determine the text that should be applied to the gallery item as a watermark.
Font Style	Choose the formatting for the watermark.

1.15 AUTONUMBERING AND DOWNLOAD FILE NAMING SETTINGS

Autonumbering and download file naming convention settings can be found by clicking the **Project Configuration** tab in project settings. Use the Project area drop-down menu to switch between autonumbering and download file name conventions.



1.15.1 Autonumbering

The reference numbers of all modules (except Documents and Packages), created via InEight Documents are automatically generated by the system.

For example, the default numbering system for mail is: <Mail Type>-<From Company ID>-<Sequential No.>. So an RFI sent by the company InEight (INEIGHT) would be auto numbered as RFI-INEIGHT-000001

InEight Document also supports the configuration of customer specific reference numbering systems for all modules.

While Document numbers are usually entered manually into InEight Document during the process of uploading documents to the system, these can also be automatically generated if necessary.

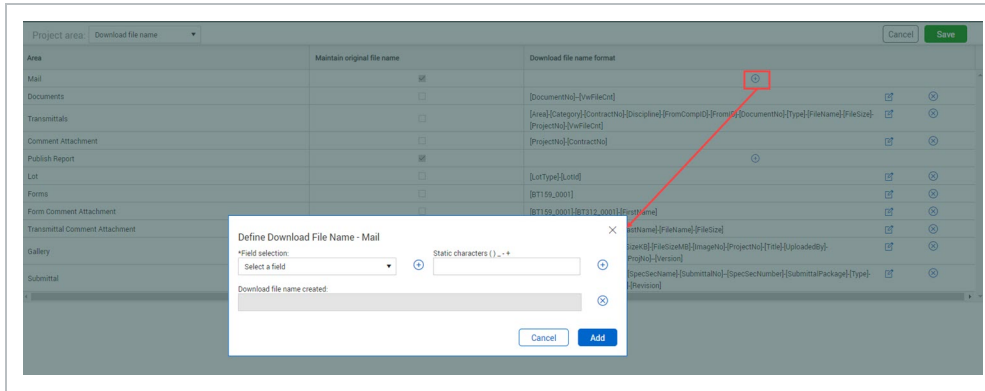
InEight Document supports auto numbering for documents based on selected metadata elements. When entering/uploading documents to the system, the use of automatic numbering rather than manual entry is triggered by the entry of the text "AUTO" in the document number field.

Numbering schemes can also be removed. To remove the existing number scheme, click the **Delete** icon next to the prefix, and then confirm. After the numbering scheme is deleted, the suffix applied can restart from 0, and you must enter numbering schemes manually.

1.15.2 Downloaded file naming conventions

The downloaded file naming convention is applied to items when they are downloaded from different areas of the system. You can choose to maintain the original file name or set up a file name format.

To set up a file name format, click the **Add** icon. The Define Download File Name dialog box opens. You can then select the fields that make up the file name when downloaded and the static characters to use as the download file name.



1.16 SUBMITTALS SETTINGS

Submittals settings can be found by clicking the Submittals tab in project settings. These settings specify the following:

- Whether all company users or selected company users can access newly created submittals
- Whether to allow closing out of submittal comments made by other users
- Whether to allow responses to closed out comments
- Whether to allow the submittal recipient to upload new documents to submittals
- Whether to disable deliverables and have documents uploaded directly to submittals

Submittals tab in project settings.

The screenshot shows the 'TRAINING504 - Project settings' interface. The left sidebar contains a list of settings categories: General, Disclaimer, Contact Details, Partners, Miscellaneous, Mail, Document, Packages, TenderDocs, Forms, Lots, Gallery, Defects, Auto Numbering, **Submittals** (highlighted), History, and User preferences. The main content area is titled 'Newly created submittals will be accessible by' and contains the following options:

- All company users
- Selected company users
- Allow closing out of Submittal comments made by other users
- Allow responses to closed out comments
- Allow submittal recipient to add new documents
- Disable deliverables ⓘ

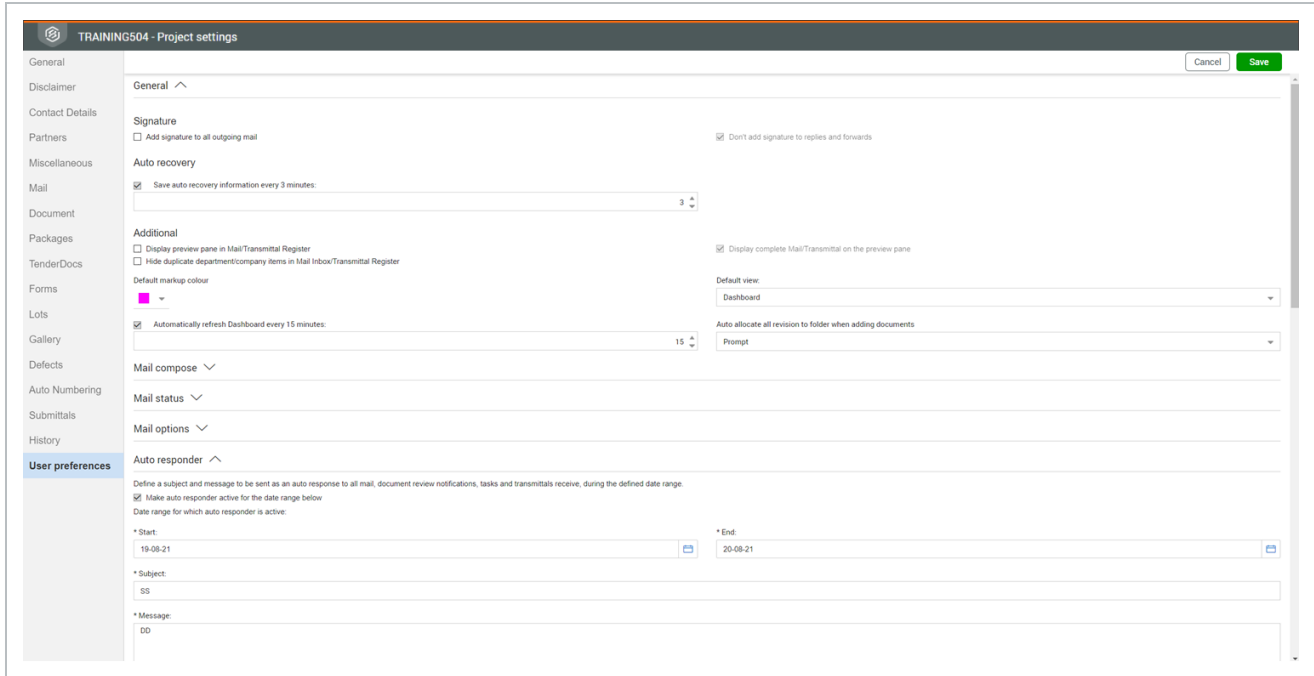
At the top right of the settings area are 'Cancel' and 'Save' buttons. The footer of the page displays '© 2022 InEight Inc. | v 21.12.12' on the left and the 'INEIGHT' logo on the right.

1.16.1 Disable deliverables

The Submittals module uses deliverables as a way to track documents. Each deliverable can contain one or more documents. When you select the **Disable deliverables** check box, documents are tracked individually against submittals.

1.17 USER PREFERENCES

User preference settings let you define default user preferences for a project that are inherited by newly created users. The default user preferences can be helpful for setting project standards for communication and notifications a new user should have when they start out. Users can update their own preferences as they become familiar with their projects.



You can set user preferences for the following categories:

Setting	Description
Signature	Add a signature to all outgoing mail.
Auto recovery	Interval at which to save autorecovery information.
Additional settings	Show the preview pane and whether to hide duplicate items in the mailbox and transmittal register. You can also specify the default markup color, default view, automatic refresh, and how to auto-allocate all revisions to folder when adding documents.
Mail compose	Compose messages in Rich text format and the default font for replying and forwarding mail. There are also settings for replies and forwards.
Mail status	Settings for assigning status for mail received as a Cc or Bcc recipient, closing out mail, displaying mail status, and automatic mail reminders.
Mail options	Settings for read receipts, updating the response date, replying to mail, hard copy print options, printing mail, and attaching mail.
Auto responder	Settings for auto responses to mail.

Setting	Description
Auto forward	Settings for activating auto forward.
Notifications	Settings for the type of notification, the language, and the modules to receive notifications for.
Task status	Settings to specify the task status statistics for the dashboard.

1.18 PROJECT SETTINGS HISTORY

The History page contains a full audit trail to track the changes made to the project setting areas. Fields include the date, page setting, event type, the name of the person who made the change, and a description.

	Date	Page Setting	Event Type	Action By	Description
Miscellaneous	17-09-21 01:00 AM		Project Settings Changed	Greg Harrison (Houston Contracting)	Project settings changed from <EnableMySubPref... - <No> To <EnableMySubPref... - <Yes>
Document	16-09-21 08:00 PM		Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Packages	16-09-21 07:59 PM		Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
TenderDocs	15-09-21 01:28 PM	UserPreferences	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Forms	12-09-21 08:34 PM	General	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Lots	11-09-21 01:43 PM	Auto Numbering	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Gallery	11-09-21 01:10 PM	Auto Numbering	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Defects	11-09-21 01:06 PM	Auto Numbering	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Auto Numbering	11-09-21 01:05 PM	Auto Numbering	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
Submittals	08-09-21 04:53 AM	Miscellaneous	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
History	06-09-21 12:09 PM	Document	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1
	06-09-21 11:48 AM	Document	Project Settings Changed	Greg Harrison (Houston Contracting)	More Information 1

Field	Description
Date	The date the change was made to the setting.
Page setting	The setting that was changed.
Event type	The type of change made.
Action by	The person that made the change.
Description	The change that was made. Click the ellipsis to see the original value and the new value.

This page intentionally left blank.

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2.1 CONTACT ADMINISTRATION

The address book in InEight Document is project specific and is structured in two levels:

1. Contacts.
2. Companies.

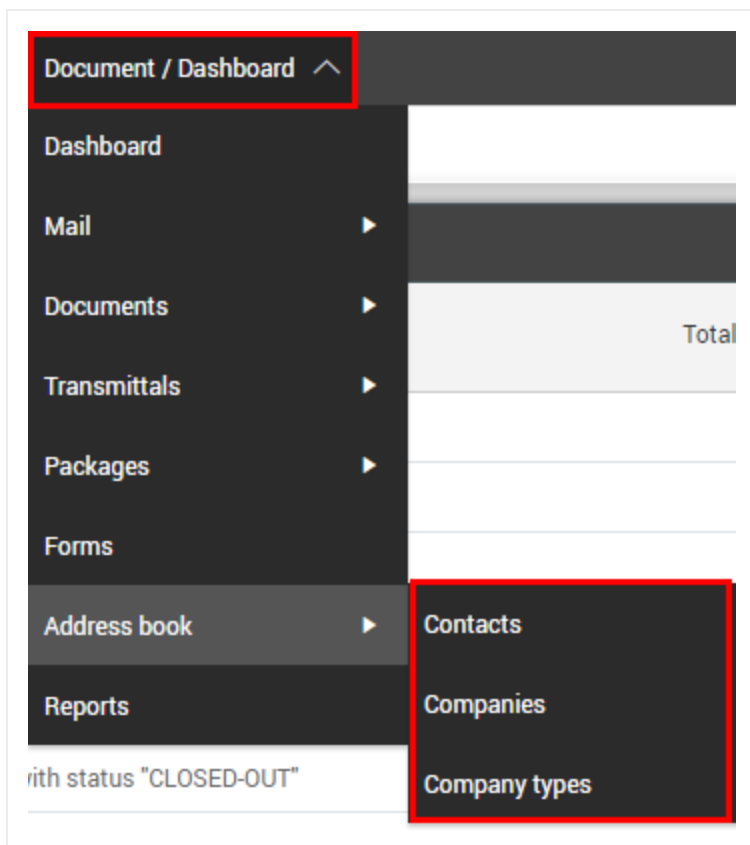
Departments can be added as an optional third level. Companies can be categorized by both company type and trade.

The address book contains details of all users of InEight Document and any external contacts. The address book can be populated manually, imported from another project or imported from MS Excel.

Adding or editing contacts is restricted to primary and additional project administrators, third party company administrators and users of the project administrator's company. It is possible to enable company administrators to also create contacts in other companies.

2.1.1 To access contact administration settings:

1. Click the **Module Menu** and hover over **Address Book**.
2. Select one of:
 - **Contacts**.
 - **Companies**.
 - **Company types**.



2.2 CREATING COMPANIES

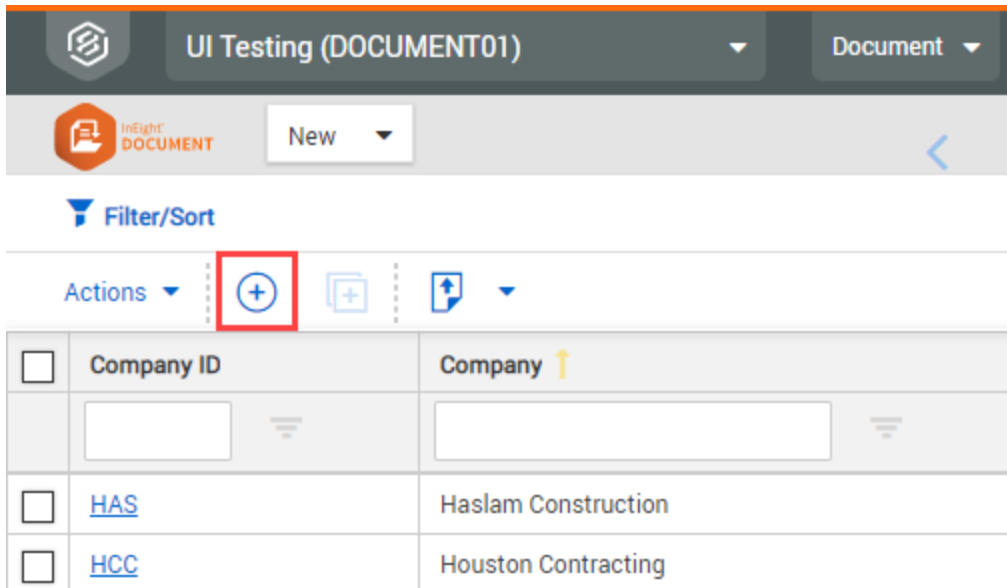
When you create companies, you define company details, options, and document access.

2.2 Step by Step 1 — Create a company

Add a new company.

The company configuration uses the Document Access fields on the New Company Details page to define access to the document register.

1. From the Module menu, click Address book, and then select **Companies**. The Companies register opens.
2. Click the **Add** icon...



The screenshot shows the InEight Document interface. At the top, there is a header with 'UI Testing (DOCUMENT01)' and a 'Document' dropdown. Below that is a navigation bar with the InEight logo, a 'New' dropdown, and a back arrow. A 'Filter/Sort' section is visible. The main area shows a table with columns for 'Company ID' and 'Company'. The 'Add' icon (a plus sign in a circle) is highlighted with a red box.

<input type="checkbox"/>	Company ID	Company ↑
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	HAS	Haslam Construction
<input type="checkbox"/>	HCC	Houston Contracting

3. Fill in the details on the Detail tab, and then click **Save..**

New Company

DETAILS
OPTIONS
DOCUMENT ACCESS

Actions
Cancel Save

* Company:

* Company ID:

* Company type:

Business Reg. No.:

▼ + ✎

Phone:

Fax:

Website:

Logo:

+ ✎

Address 1:

Address 2:

City:

State:

Postcode:

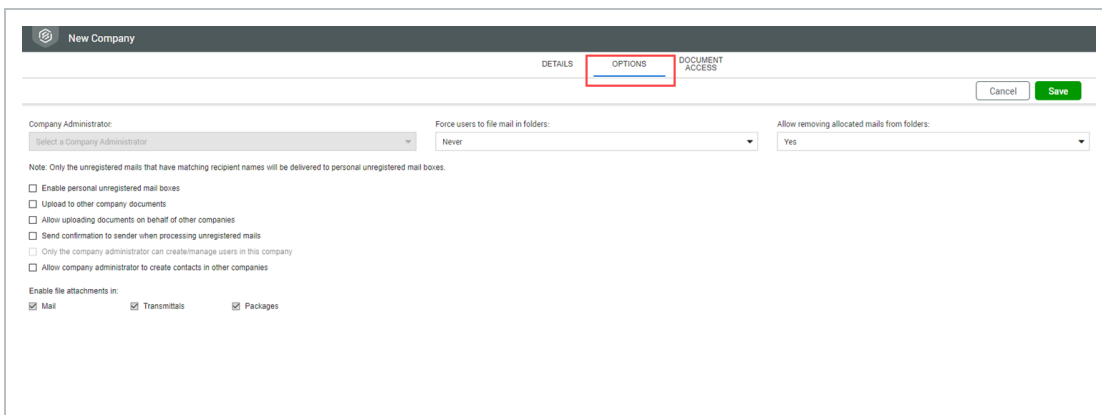
County:

▼

Field	Description
Company	The company name.
Company ID*	<p>The company ID you assign is used throughout the InEight Document system. As a best practice, it is recommended to document a procedure for this process prior to assigning company IDs.</p> <div style="background-color: #e0e0e0; padding: 10px; margin-top: 10px;"> <p>NOTE This ID is used in numbering schemes for items such as mail, transmittals, and forms, so it is worth considering the most suitable ID to be used.</p> </div>
Company Type*	The type of company.
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

Field	Description
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, Transmittals, Forms, and Reports, and other communication.

4. Fill in the information on the Options tab, and then click **Save**.

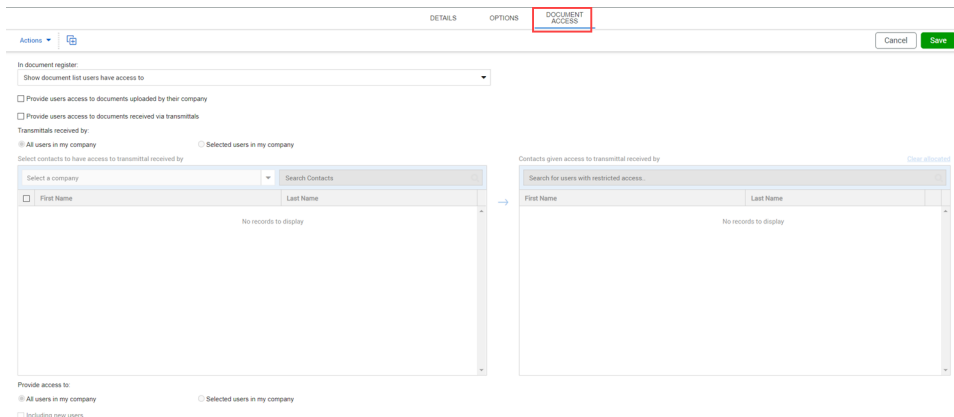


Field	Description
Company Administrator	Selected Company Administrator. This user has the ability to undertake specific administration tasks for the company, such as creating and managing users.
Force users to file mail in folders	Enforces the filing of mail into folders for users in this company. The options are Never, Prompt, or Always.
Allow removing allocated mails from Folders.	Controls whether users can remove mails from Folders once they have been filed.
Enable Personal Unregistered	Activates the Personal Unregistered Mailbox for this company.

Field	Description
Mailboxes	
Upload to other company documents	<p>Enables the company to upload revisions of documents when they are not in the original uploading company.</p> <p>Occasionally, a company might need to revise documents that were originally uploaded by another company, for example, to supersede Revision A with Revision B, where that company did not upload Revision A. If this option is enabled, a company can supersede documents in the above scenario if they have access to the document.</p>
Allow uploading documents on behalf of other companies.	<p>This option enables this company to upload documents on behalf of other companies. If the Upload to other company documents check box in your company's options is selected, you can specify the company using the following fields in the document details screen:</p> <ul style="list-style-type: none"> • Sender Company - specifying the company • Sender. Specifying the user in that company
Send confirmation to sender when processing unregistered mails.	Deselect 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	Prevents the Primary or Additional Project Administrators or other users belonging to this company from creating additional users within this company. This option is disabled by default. To enable it, contact InEight customer support at support@ineight.com.
Allow company administrator to create contacts in	Enables company administrators to create contacts in companies other than their own. This option can only be enabled by InEight. To enable it, contact InEight customer support at support@ineight.com.

Field	Description
other companies	
Allow user custom register views	Enables users to create their own custom views of the main InEight Document registers.
Enforce two-factor authentication for all company users	Enforces two-factor authentication for all users in the company. When single sign-on is enabled for the company, this field is disabled.

5. Fill in the information on the Document Access tab.



Field	Description
In Document Register	<p>The documents that are shown in the Documents register for all users on this project. Choices are as follows:</p> <ul style="list-style-type: none"> • Show document list users have access to - Allows users in that company to only see documents listed that they have access to. This is the recommended setting • Show document list users have access to or uploaded by their company - Allows all users in a company to see any document in the register that has been uploaded by any user in their company. • Show entire document list - Allows users to see the entire list project document list.

Field	Description
	<p>NOTE These options affect only the view in the details in the Documents register. They do not change a person's access.</p>
Provide users access to documents uploaded by their company	Automatically gives access to all users in a company to any documents uploaded by any user at the company.
Provide users access to documents received via transmittal	<p>Automatically grants access to documents to specific users or all users when they are received via transmittal by user groups within the company. When selected, you can specify users for the Transmittals received by and Provide access to sections.</p> <ul style="list-style-type: none"> • Transmittals received by - Select the users (All or Selected users) that will receive transmittals and then grant document access to other users within the company. • Provide access to - Select the users (All or Selected users) who will gain access to the documents received via the transmittals defined above. If you selected All users, you can select the Including new users check box to allow new users in the company to gain access as they are set up.

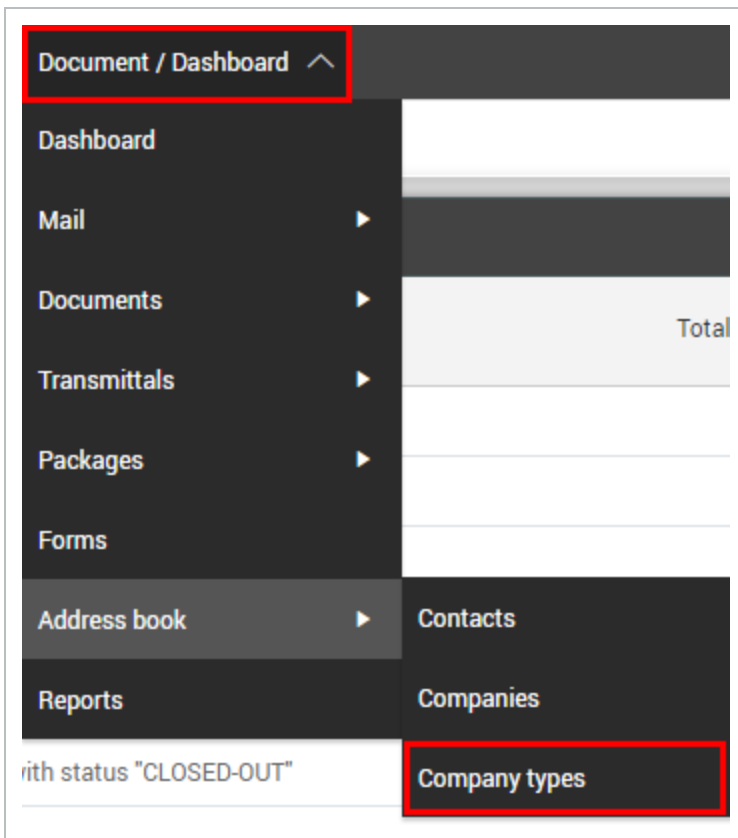
4. Click **Save**.

NOTE You can add a company logo by clicking the **Add** icon in the Logo field.

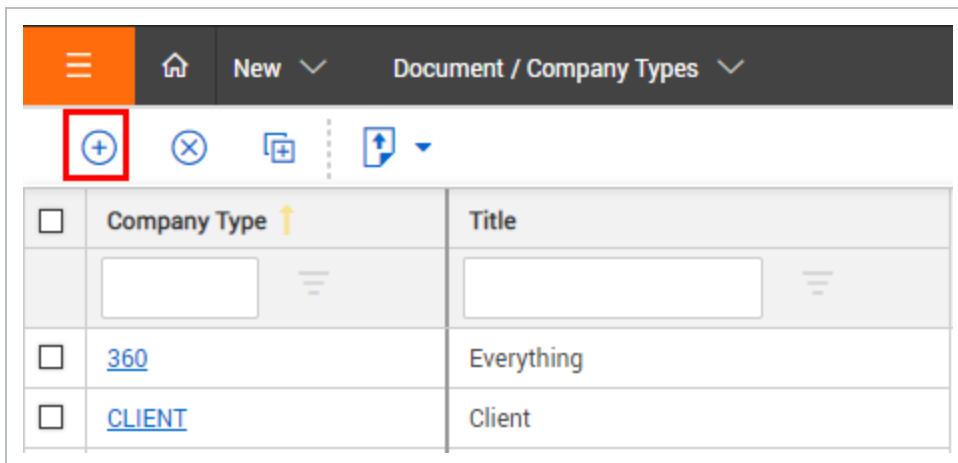
2.3 CREATING COMPANY TYPES

2.3.1 To create a company type:

1. Click the **Module Menu**, hover over **Address book** and select **Company types**.



2. Click the **plus icon**.



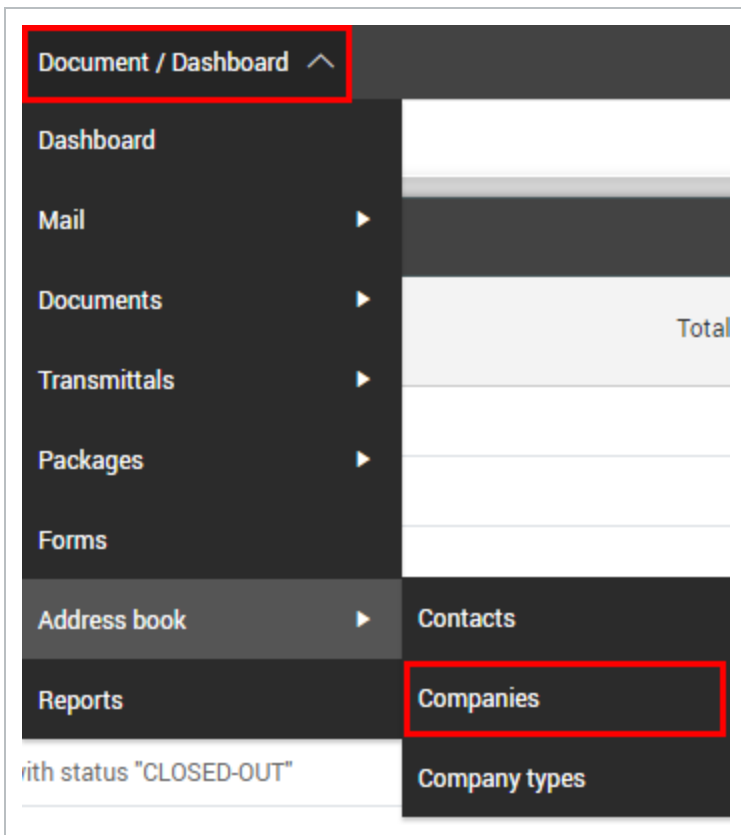
3. Enter in the company details.

4. Click **Save**.

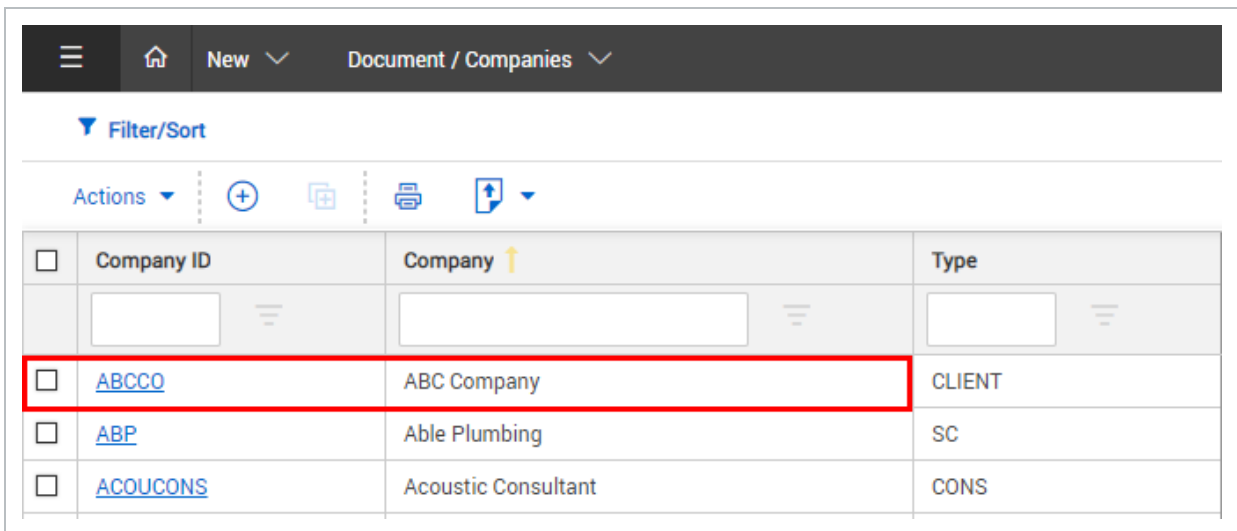
2.4 CREATING DEPARTMENTS

2.4.1 To create departments:

1. From the **Module Menu**, hover over **Address book** and select **Companies**.



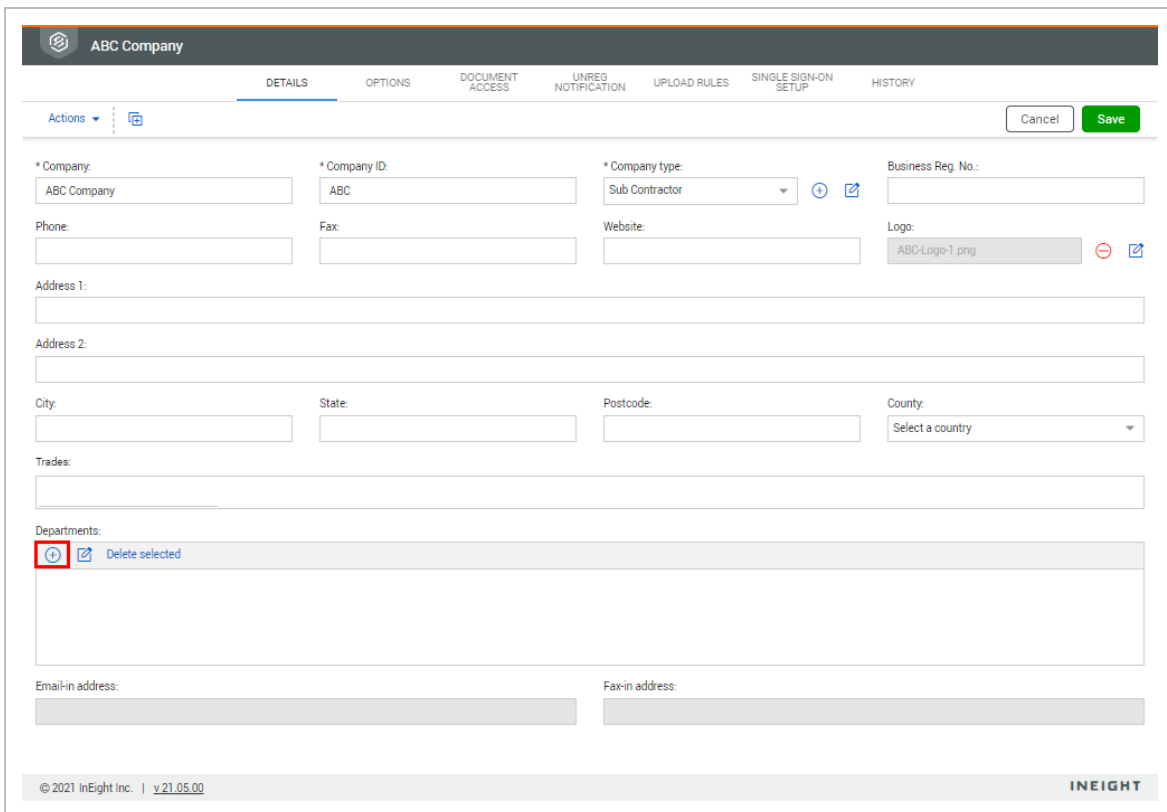
2. Select the company.



The screenshot shows a table with columns for Company ID, Company name, and Type. The row for 'ABCCO' is highlighted with a red border. Above the table are navigation and action icons.

<input type="checkbox"/>	Company ID	Company ↑	Type
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	ABCCO	ABC Company	CLIENT
<input type="checkbox"/>	ABP	Able Plumbing	SC
<input type="checkbox"/>	ACOUCONS	Acoustic Consultant	CONS

3. In the **Departments** section, click the **plus icon**.



The screenshot shows the 'ABC Company' details page. The 'Departments' section at the bottom has a plus icon highlighted with a red box. The page includes various input fields for company information and a 'Save' button.

ABC Company

DETAILS | OPTIONS | DOCUMENT ACCESS | UNREG NOTIFICATION | UPLOAD RULES | SINGLE SIGN-ON SETUP | HISTORY

Actions

Cancel Save

* Company: ABC Company * Company ID: ABC * Company type: Sub Contractor Business Reg. No.:

Phone: Fax: Website: Logo: ABC-Logo-1.png

Address 1:

Address 2:

City: State: Postcode: County: Select a country

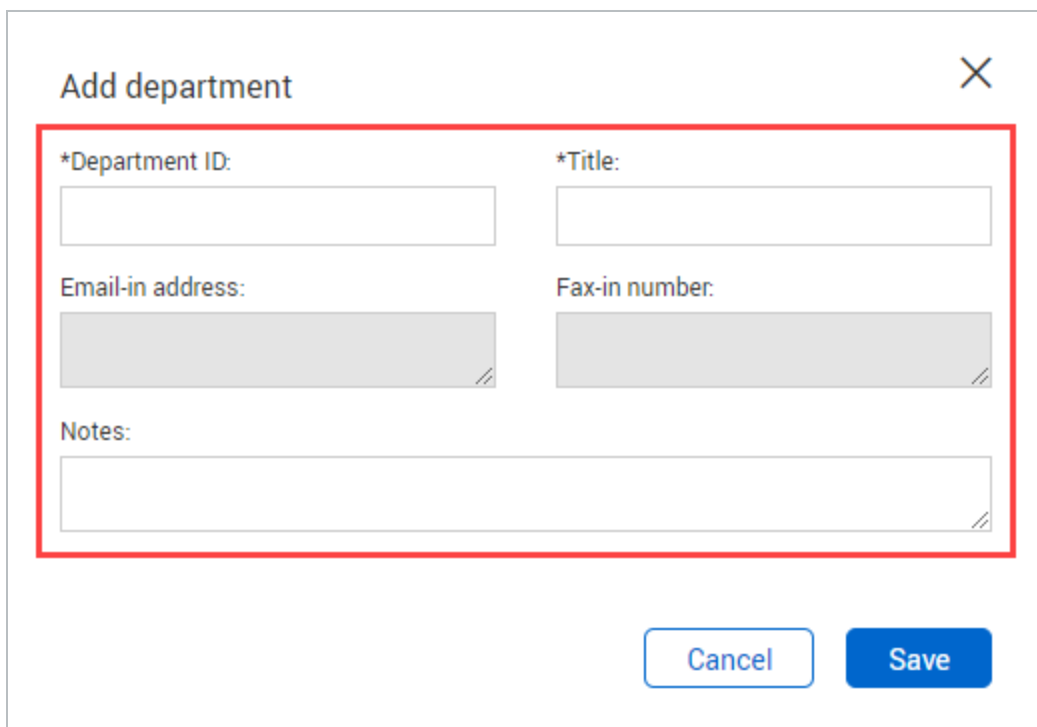
Trades:

Departments: Delete selected

Email-in address: Fax-in address:

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4. Enter in the department details.



The screenshot shows a dialog box titled "Add department" with a close button (X) in the top right corner. The dialog contains five input fields arranged in two columns. The first column has "*Department ID:" and "Email-in address:". The second column has "*Title:" and "Fax-in number:". Below these is a "Notes:" field. A red rectangular border highlights the first four fields. At the bottom right of the dialog are two buttons: "Cancel" and "Save".

5. Click **Save**.

2.5 CREATING EXTERNAL CONTACTS AND USERS

External contacts are contacts that need to be sent mail or documents but are not required to log in to InEight Document as a user.

External contacts are set up in the Contacts settings in the same way as users of InEight Document. They are indicated as external using by selecting the External Users check box in the user creation details window.

The following differences apply to external contacts:

- Mail sent to an external contact is received as an email rather than a notification about mail.
- 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.
- If an external contact replies directly to mail received from InEight Document, the mail is routed back into the InEight Document **Unregistered Mail** folder for processing.

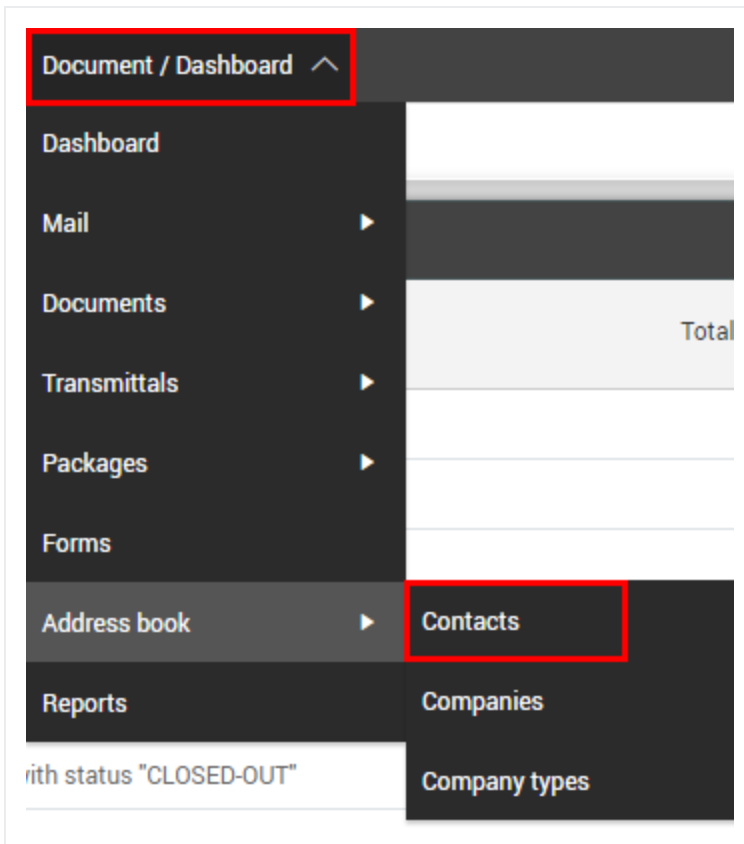
All other notifications generated by InEight Document such as transmittals operate normally for external contacts. If an external contact is changed to an InEight Document user, they will see all mail and transmittals sent to them as though they had been an InEight Document user from the beginning.

2.5 Step by Step 1 — Create external contacts

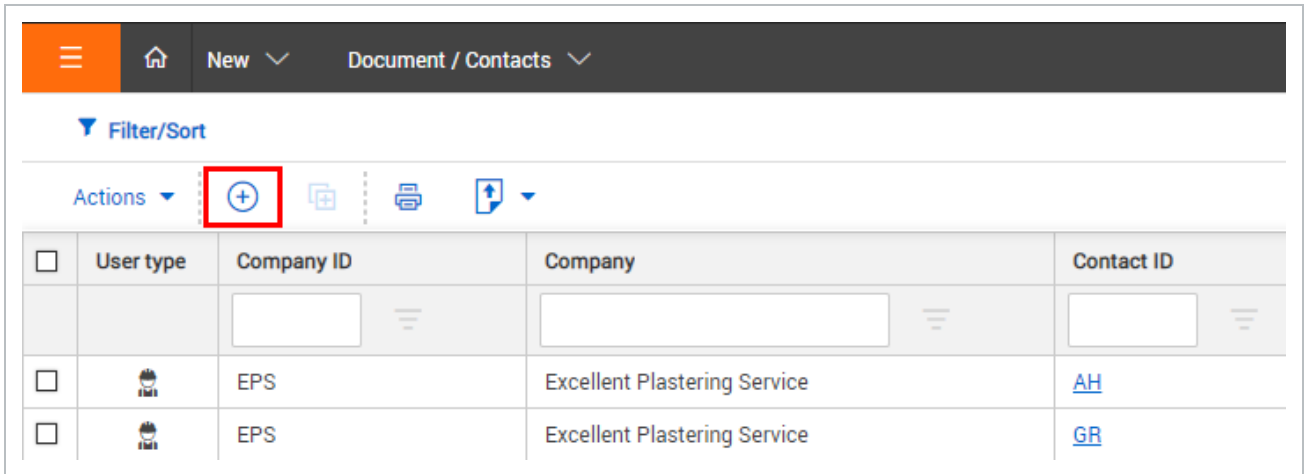
Summary: Create an external contact to give access to Document. All Document users are contacts. Internal contacts are first configured as external contacts.

Quick steps:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.

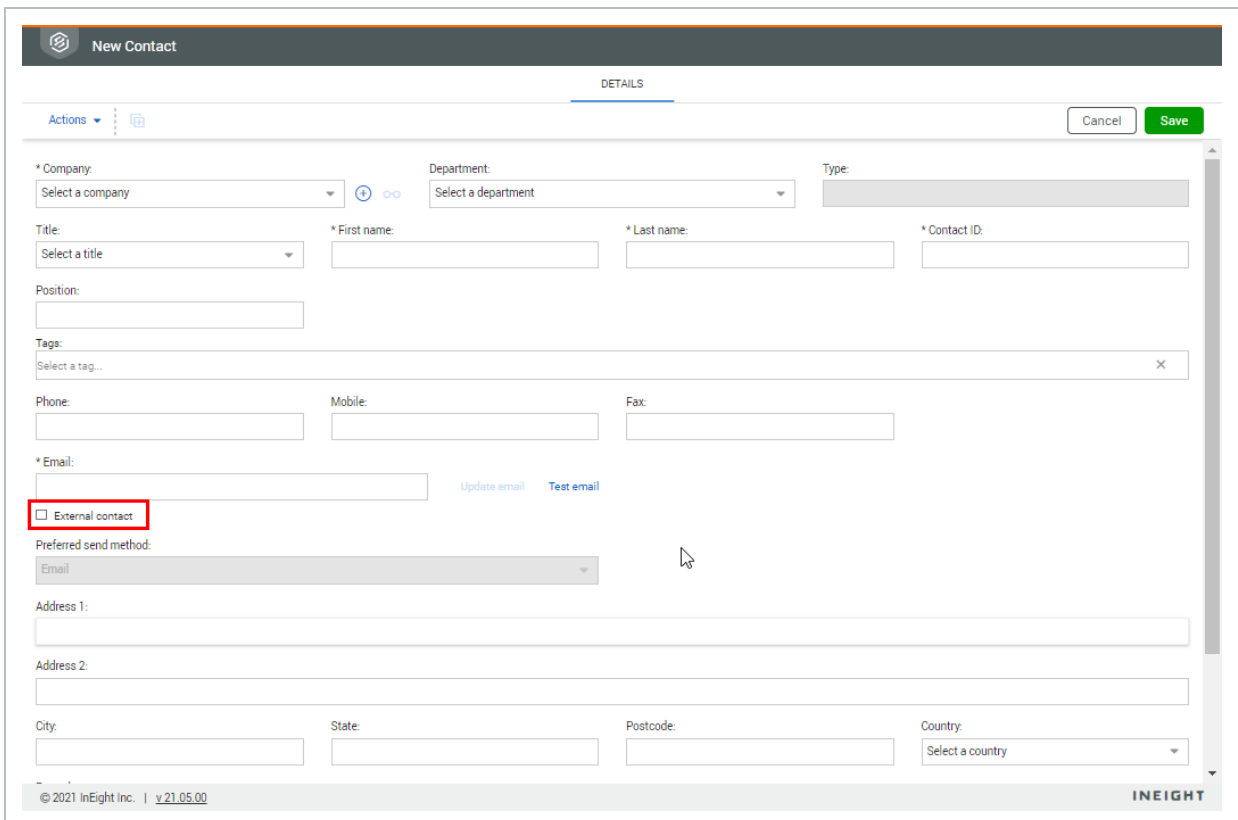


2. Click the **Add** icon.



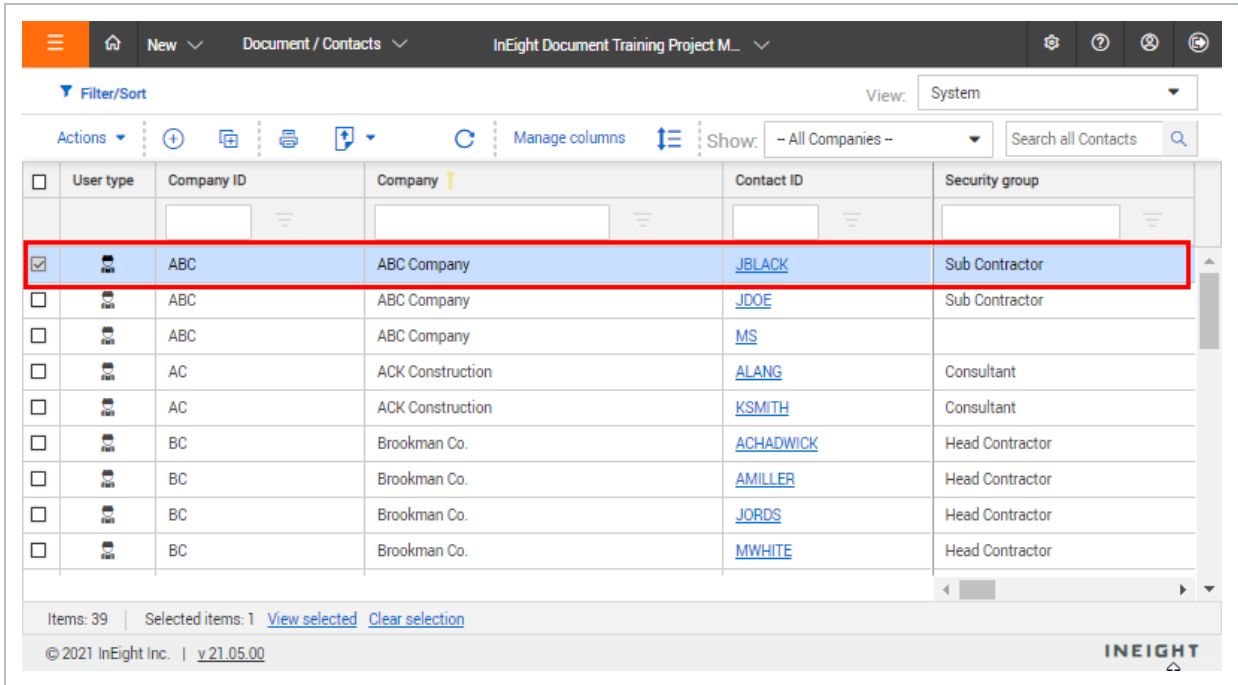
3. Fill in the contact details.

4. Select the **External contact** check box.

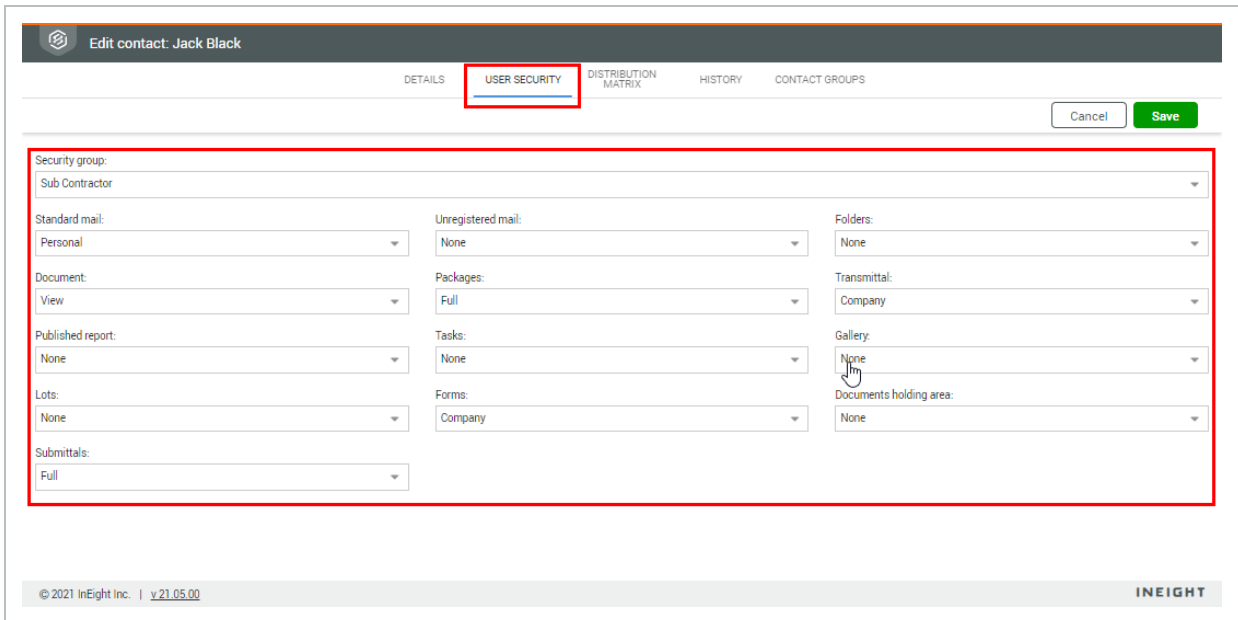


2.5 Step by Step 2 — Make a contact an InEight Document user

1. Double click the contact to open it.



2. Click the **User Security** tab.
3. Select the access level for each module.



4. Click **Save**. The user is added to the Contacts register.
5. Add or view user information on the following tabs:
 - You can add security for Document features on the User security tab
 - You can add contacts to a distribution rule on the Distribution Matrix tab
 - You can view the history of the contact configuration on the History tab
 - You can add the contact to one or more contact groups on the Contract groups tab
 - You can add Roles for the contact on the Roles tab.

NOTE

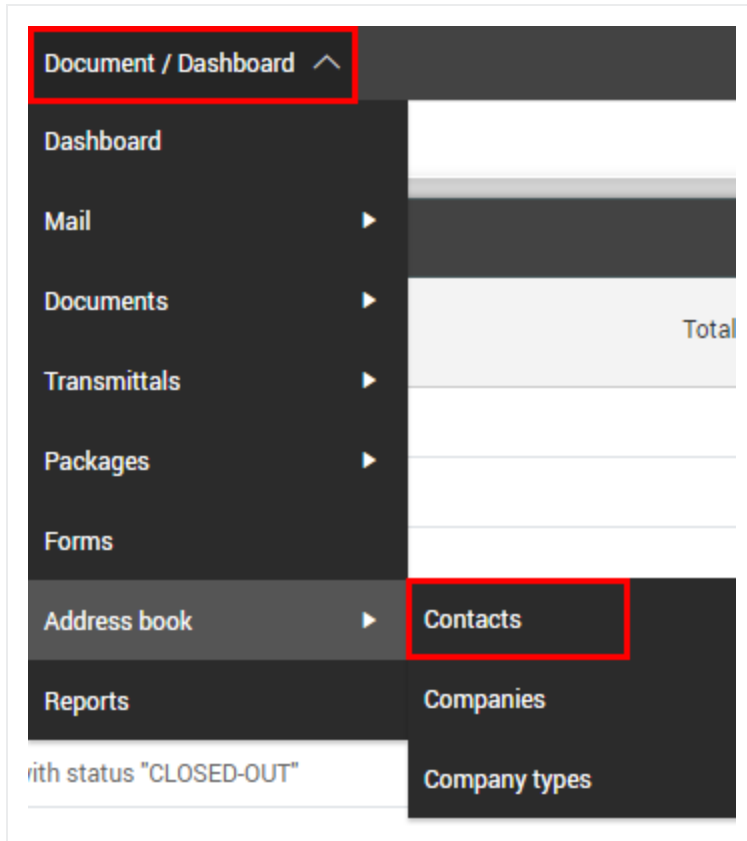
- When a contact is made inactive they will not receive notifications. They are also removed from listed document distribution rules and any assigned security groups.
- If an inactive contact is made active again, you will be prompted to reinstate their previous access level.

2.6 IMPORTING CONTACTS FROM ANOTHER INEIGHT DOCUMENT PROJECT

Contact and company details can be imported from other InEight Document projects that the project administrator has access to.

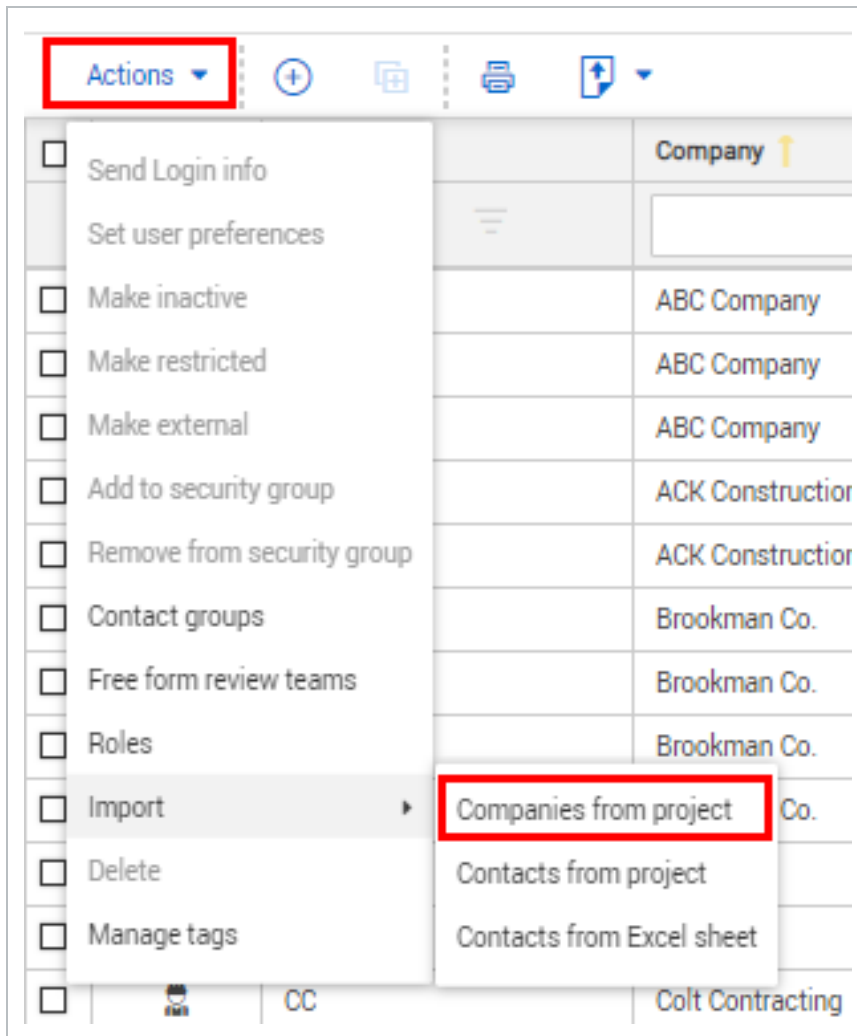
2.6.1 To import a contact list from another InEight Document Project:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.



2. Click **Actions**.

3. In the **Import** menu, select **Companies from project**.



4. Select the company and click the **arrow icon**.

Import Companies

Project: 11 Demo - (Support Testing Project) Company type: Trade:

Select companies to import

Company ID	Company
<input checked="" type="checkbox"/>	ARC Archon Consultants Pty Ltd
<input type="checkbox"/>	EPS Engineering Project Services
<input type="checkbox"/>	HAS Haslam Construction
<input type="checkbox"/>	HCC Houston Contracting
<input type="checkbox"/>	LSA Lift Services Australia
<input type="checkbox"/>	MDT Mitch's Department Testers
<input type="checkbox"/>	MMRA MMRA

Selected companies

Company ID	Company
No records to display	

Close Submit

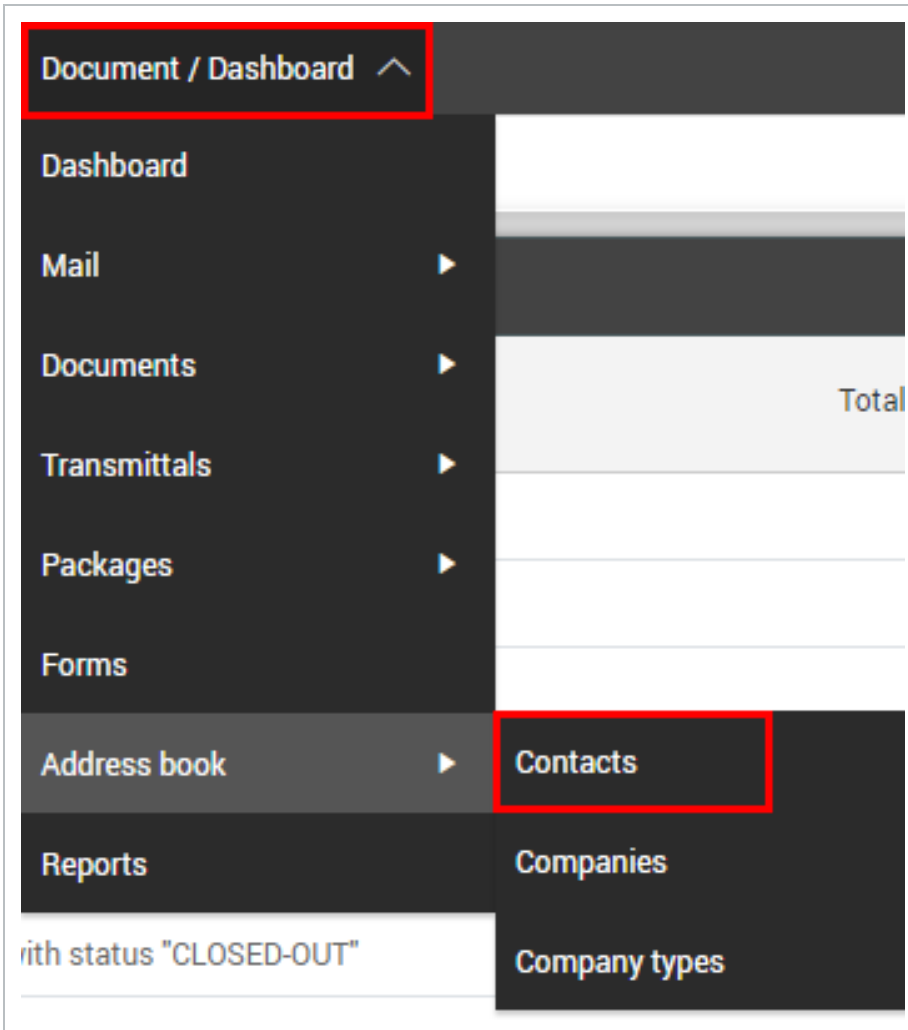
5. Click **Submit**.

2.7 IMPORTING CONTACTS FROM MICROSOFT EXCEL

Contact and company details can be imported from a Microsoft Excel worksheet. The imported Microsoft Excel sheet needs to be downloaded, completed, saved and then imported.

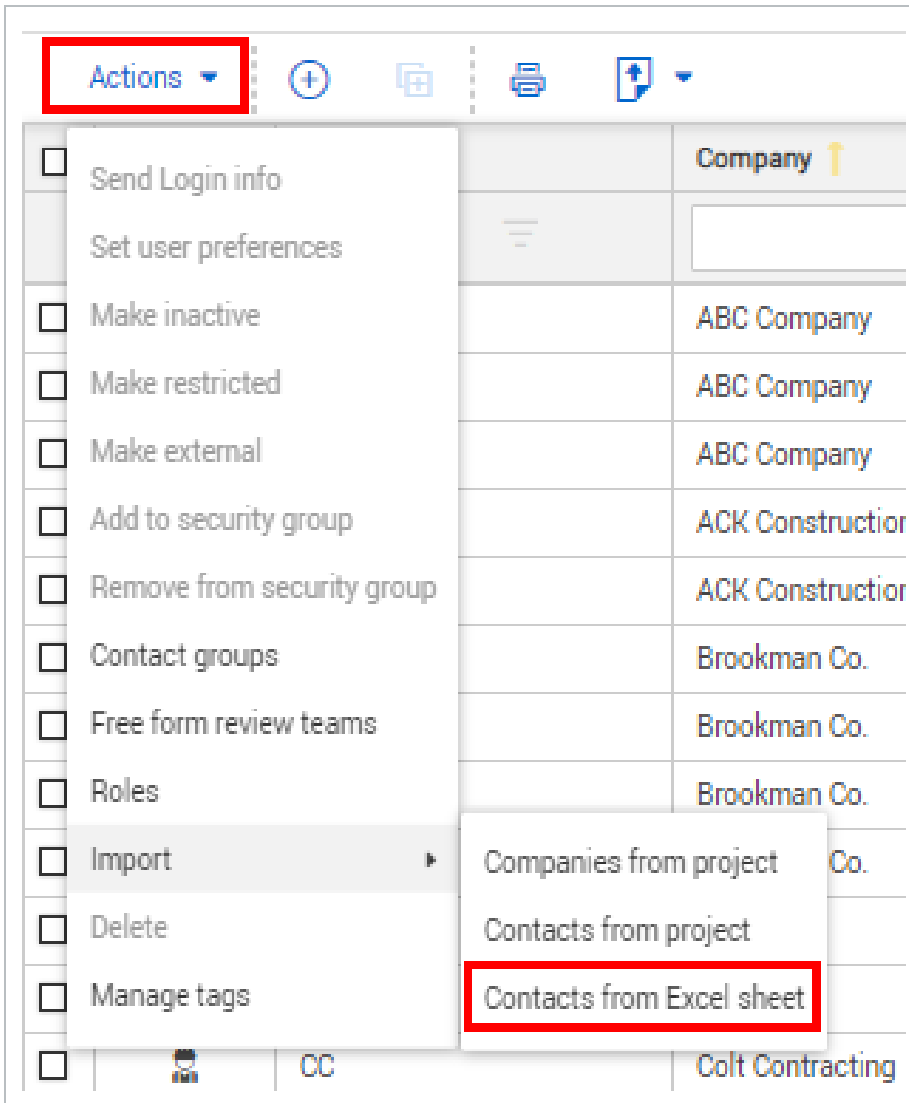
2.7.1 To import a contact list from another InEight Document Project:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.

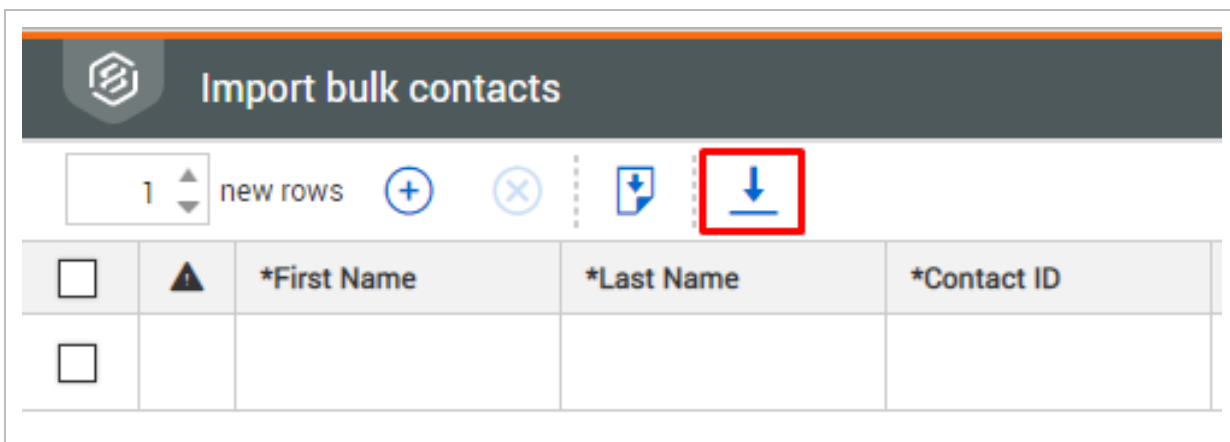


2. Click **Actions**.

3. In the **Import** menu, select **Contacts from Excel sheet**.



4. Click **Download Excel** template button



5. Populate the downloaded import template with the Contact and Company details
6. Click **Import contacts from Excel template** to import contacts
7. **Validate** the contact information is correct
8. Click **Save** to finalize the import of contacts

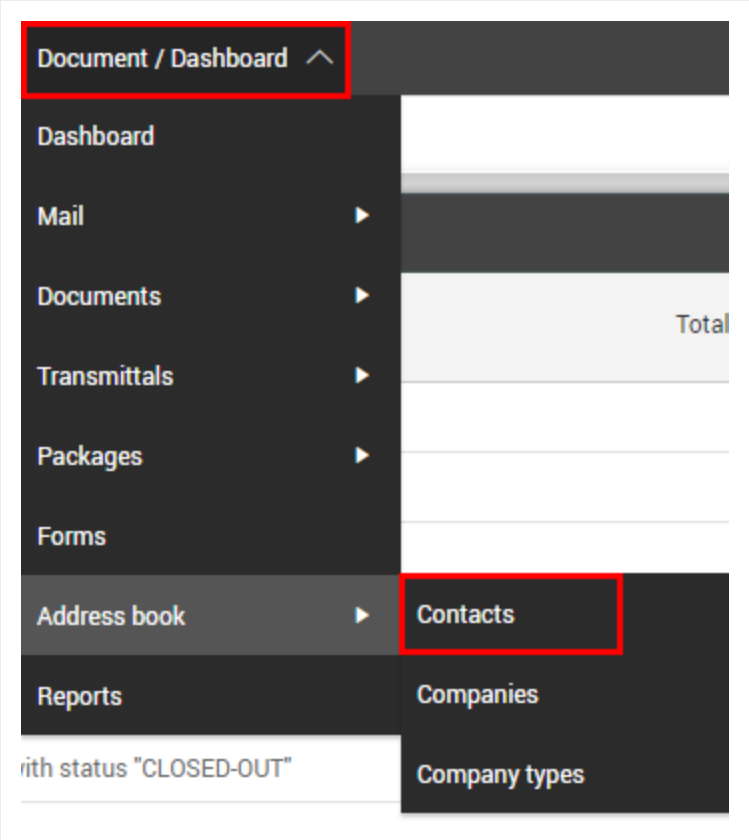
2.8 CREATING CONTACT GROUPS

Contact groups can be set up on a per user basis and made available to other users from within the same company.

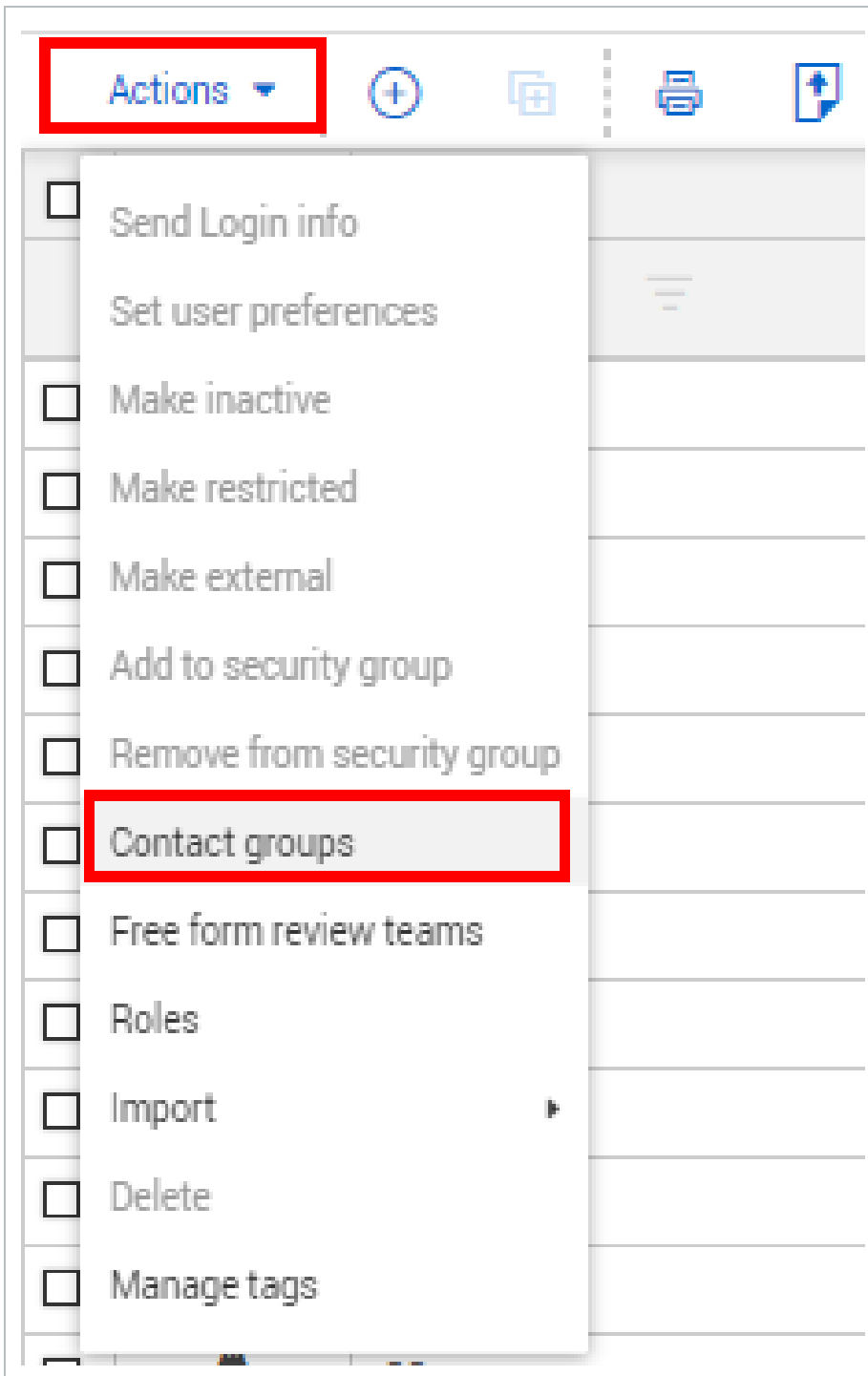
A smart contact group is populated and updated automatically with existing and future contacts based on a defined filter criteria.

2.8.1 To manage contact groups:

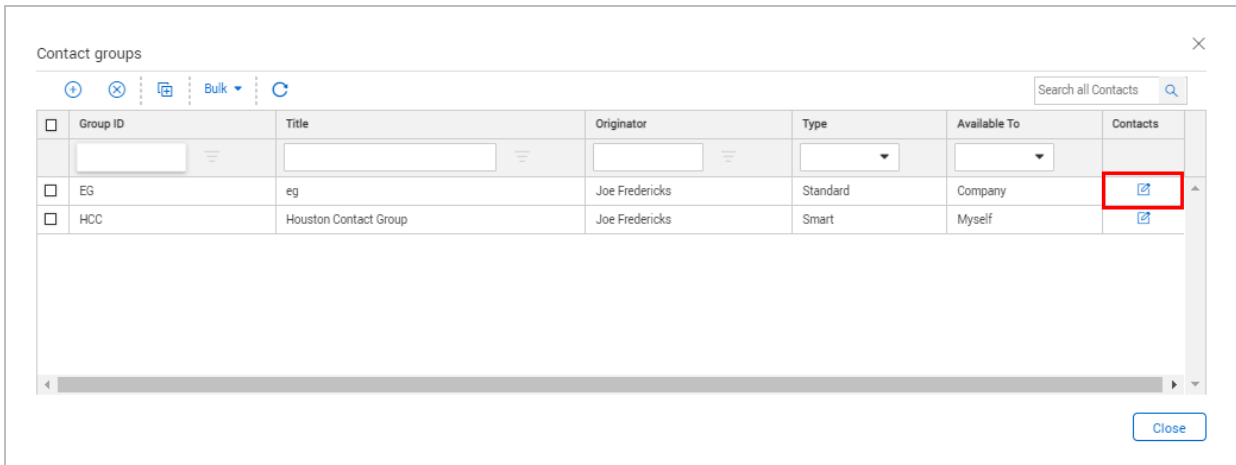
- 1. Click the **Module Menu**, hover over **Address book** and select **Contacts**.



2. Click **Actions** and select **Contact groups**.

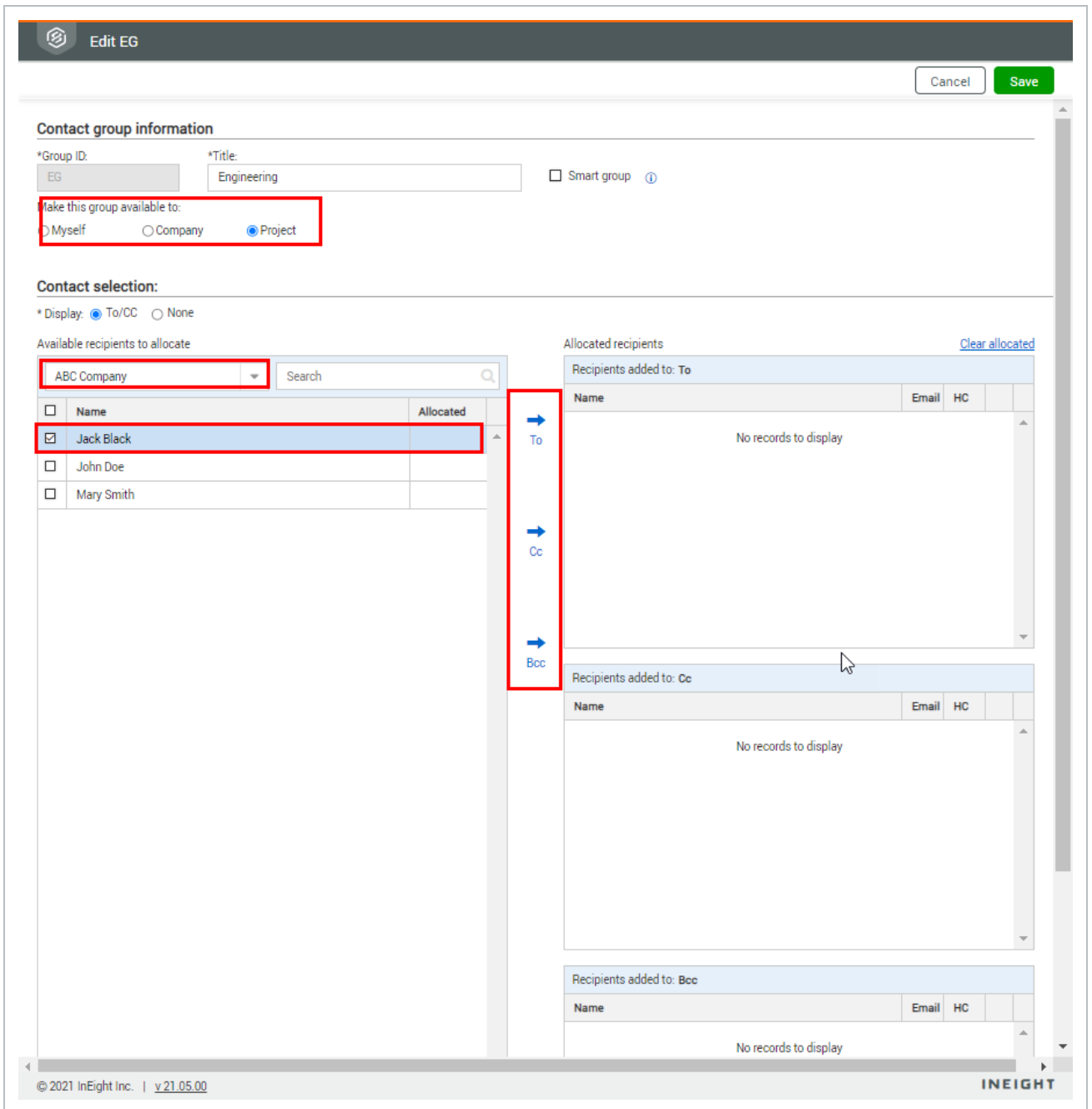


3. Click the **edit icon** of the contact group you want to edit.



4. Select whether to make the group available to:
 1. **Myself.**
 2. **Company.**
 3. **Project.**
5. Select the company from the drop-down menu.

6. Select the contact and add them to the **To**, **Cc** or **Bcc** groups.



7. Click **Save**.

NOTE

- If you select **None** under contact selection, you can add members to a contact group under a single selection.
- To make the contact group a smart group, select the **Smart group** check box.
- The **Bcc** option will only be available if blind copies have been activated for the project.

2.8.2 To manage smart contact groups:

1. Select the **Smart group** check box.

The screenshot shows the 'Edit EG' interface. At the top, there is a header bar with the 'Edit EG' title and 'Cancel' and 'Save' buttons. Below the header, the 'Contact group information' section contains fields for '*Group ID:' (EG) and '*Title:' (Engineering). A checkbox labeled 'Smart group' is highlighted with a red box and is checked. Below this, there are radio buttons for 'Make this group available to:' with 'Project' selected. The 'Contact selection:' section has a '* Display:' dropdown set to 'To/CC' and 'None'. Under 'Available recipients to allocate', there is a search bar and a table with columns 'Name' and 'Allocated'. The table lists Jack Black, John Doe, and Mary Smith, with Jack Black checked. To the right, the 'Allocated recipients' section shows three empty tables for 'To', 'Cc', and 'Bcc', each with columns 'Name', 'Email', and 'HC'. The footer contains copyright information and the INEIGHT logo.

2. Select the filter criteria and click **Filter** to automatically add contacts to the contact group.

3. Click **Save**.

NOTE

- You cannot manually add contacts to a smart contact group.
- If an existing contact group is changed to a smart contact group, the allocated contacts will be removed.

2.9 CREATE ROLES

You can define contact roles for your organization. Roles are used throughout Document to represent a group of people with the same responsibilities. Roles can be configured as contact groups that you can use as a distribution list when you create mail or a transmittal.

2.9.1 Create a role

1. Click the **Module Menu**, hover over **Address book**, and then select **Contacts**.
2. Click **Actions**, and then select **Roles**. The Manage Roles dialog box opens.

3. Enter the role ID and title.
4. To make the role available as a contact group for distribution lists, check the **Display as contact group** check box.

Manage Roles

Roles

<input type="checkbox"/>	Role ID	Title	Display as contact group
<input type="checkbox"/>	000-SUB-00	000-SUB-00	<input type="checkbox"/>
<input type="checkbox"/>	000-SUB-02	000-SUB-02	<input type="checkbox"/>
<input type="checkbox"/>	001	001	<input type="checkbox"/>
<input type="checkbox"/>	002	002	<input type="checkbox"/>
<input type="checkbox"/>	003	003	<input type="checkbox"/>

Users

<input type="checkbox"/>	Company	Name
There are no items in this project.		

Close Save

5. If the role is specific to a company that has already been defined, select the company.
6. Click **Save**.

When you select the contract group for the To field of a mail or transmittal, the names of the people in the group populate the To field.

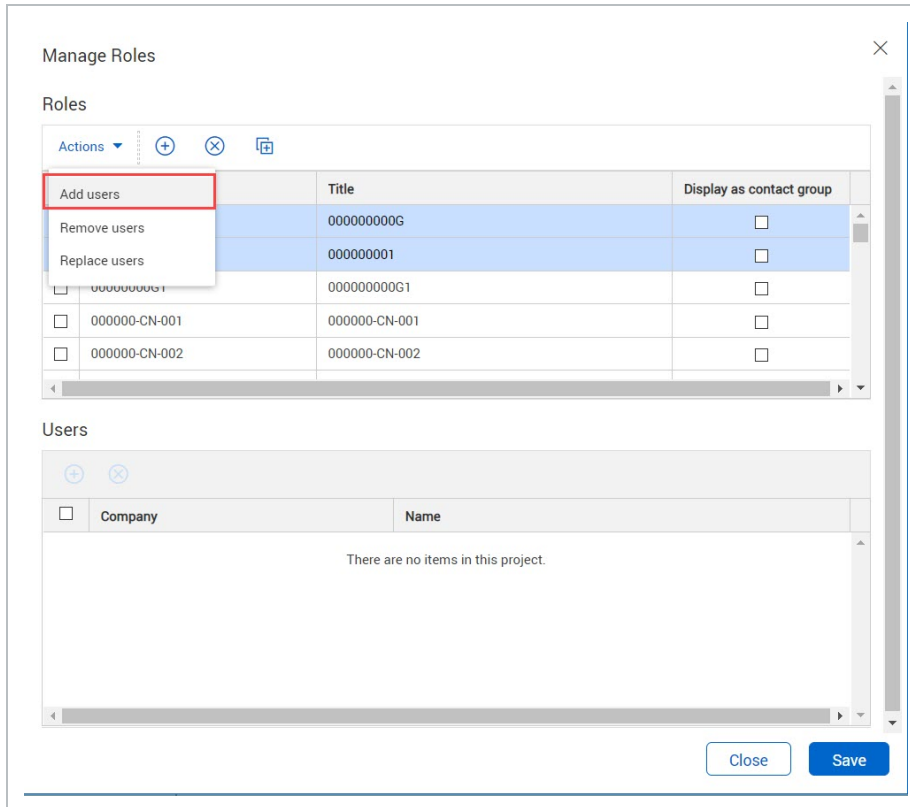
2.9.2 Manage roles

You can add, remove, or replace users in roles in bulk in the contacts address book.

2.9 Step by Step 1 — Add a user to multiple roles

Add a user to multiple roles.

1. From the **Actions** menu in the address book, select **Roles**. The Manage Roles dialog box opens.
2. Select one or more roles.
3. Expand the **Actions** menu, and then select **Add users**.



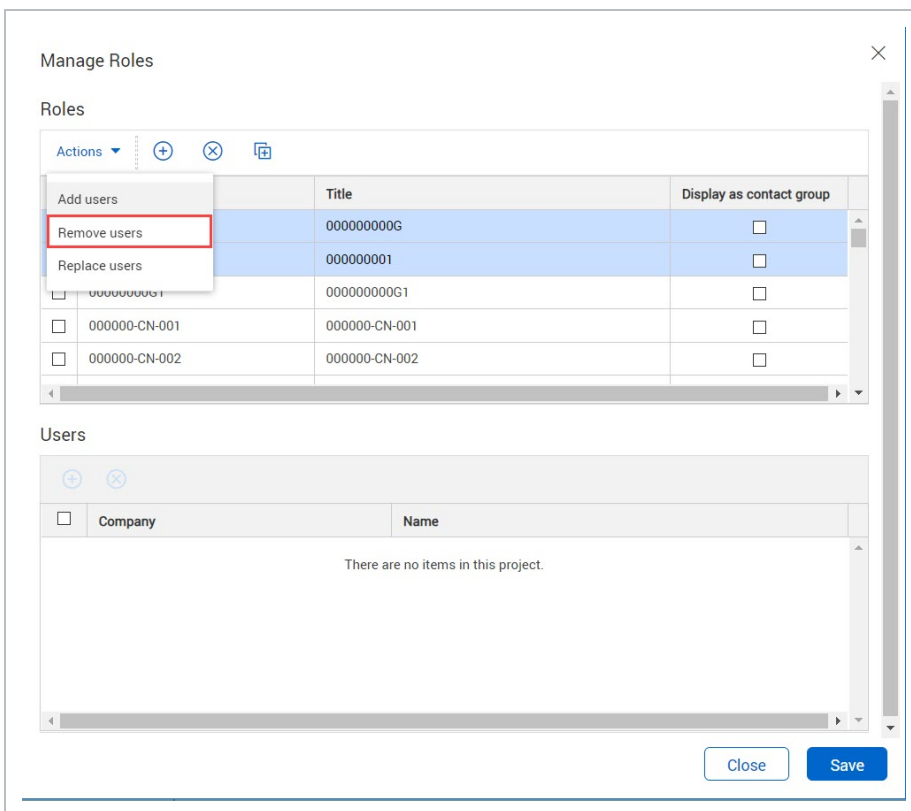
The Add users dialog box opens

4. Select a company and the user name.
5. Click **Add**.

2.9 Step by Step 2 — Remove a user from multiple roles

Remove a user from multiple roles.

1. From the **Actions** menu in the address book, select **Roles** or **Free form review teams**. The Manage Roles dialog box opens.
2. Select one or more roles.
3. Expand the **Actions** menu, and then select **Remove users**.



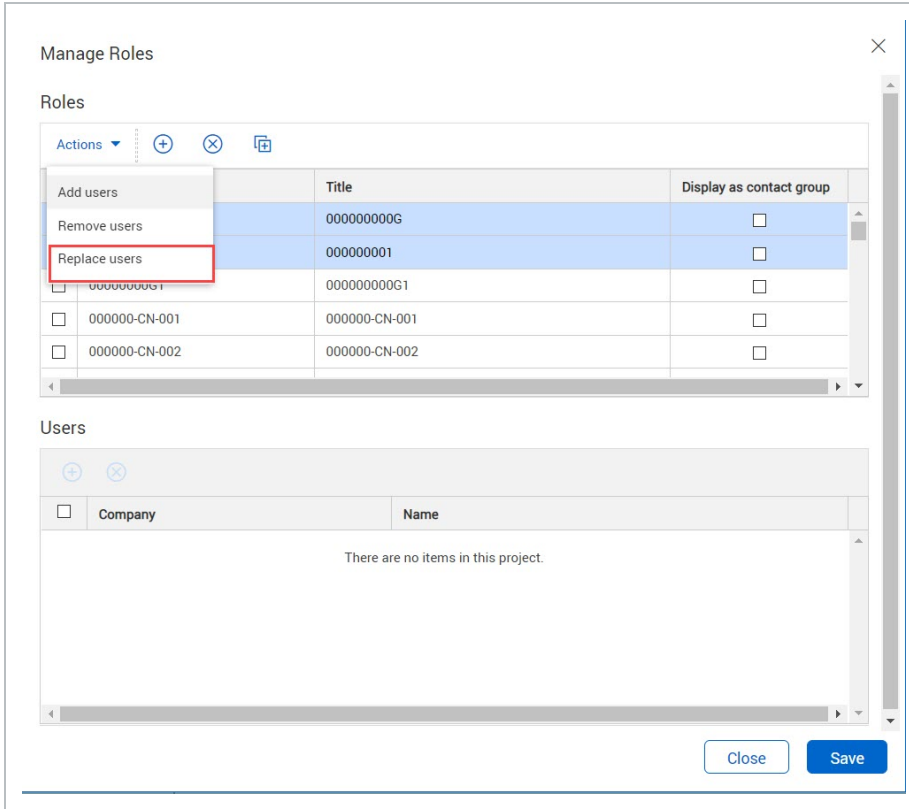
The Remove users dialog box opens.

4. Select the name of the user, and then click **Remove**.

2.9 Step by Step 3 — Replace a user in multiple roles

Replace a user in multiple roles.

1. From the **Actions** menu in the address book, select **Roles** . The Manage Roles dialog box opens.
2. Select one or more roles.
3. Expand the **Actions** menu, and then select **Replace users**.



The Replace users dialog box opens.

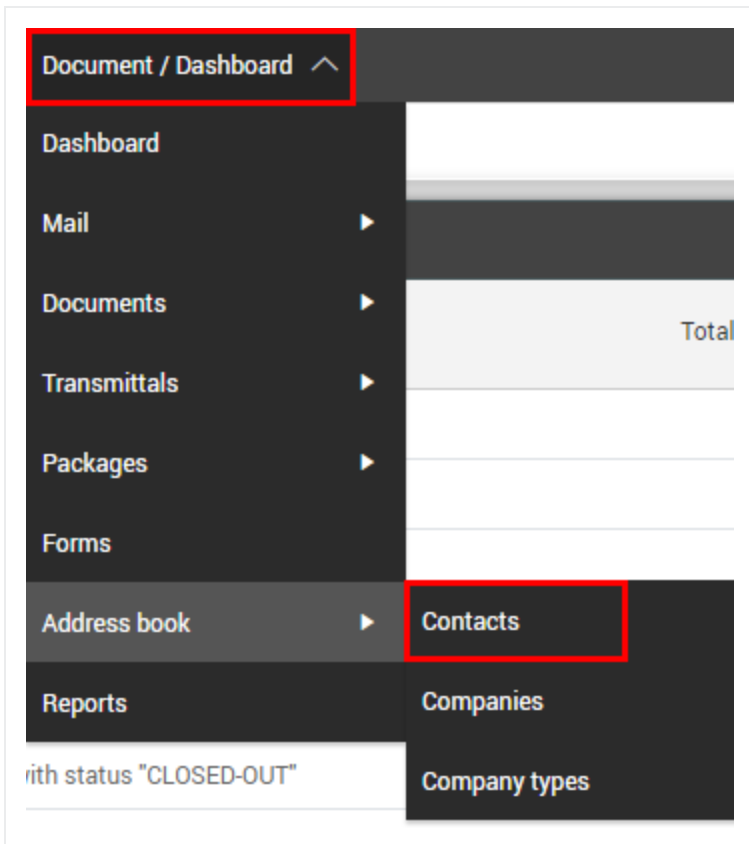
4. Select the user name for the current user, and then select the user company and user name for the replacement user.
5. Click **Replace**.

2.10 RESTRICTING USERS

A restricted user only sees a limited section of the address book. This may be required for privacy reasons. For example, a subcontractor might be restricted to only communicate with the prime contractor and not the engineering consultants or client.

2.10.1 To restrict a user:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.



2. Select the user.

3. Select the **Make contact restricted** check box.

The screenshot shows the 'Edit contact: Greg Harrison' form. At the top, there are tabs for 'DETAILS', 'USER SECURITY', 'DISTRIBUTION MATRIX', 'HISTORY', and 'CONTACT GROUPS'. Below the tabs, there are 'Actions', 'Cancel', and 'Save' buttons. The form fields include: Company (Houston Contracting), Department (Select a department), Type (HC), Title (Select a title), First name (Greg), Last name (Harrison), Contact ID (GHA), Position, Tags, Phone, Mobile, Fax, Email (Greg.H@HCC.com), External contact, Preferred send method (Email), Address 1, Address 2, City, State, Postcode, Country (Select a country), and Remarks. At the bottom, there are checkboxes for 'Make contact inactive', 'Include inactive contact in filters', and 'Make contact restricted'. The 'Make contact restricted' checkbox is highlighted with a red box.

4. Click **Save**.

NOTE

- Restricted users are displayed in red.
- The contacts that a restricted user can see are listed in the **Restricted Access** 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. The list of restricted contacts that the administrator has access to will automatically be carried forward to the new users.

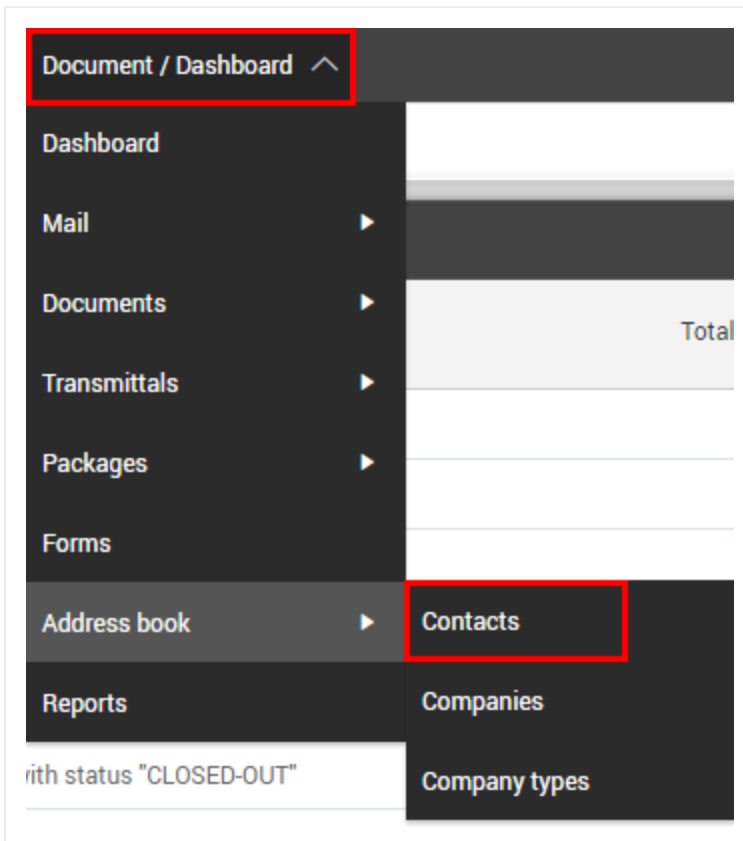
2.11 SENDING USERS PLAIN TEXT EMAILS

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 and transmittals to appear in a high-quality format rather than unformatted text.

Some email systems do not support HTML formatted emails, meaning 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. This ensures the message and information is clear.

2.11.1 To activate plain text emails for a contact:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.



2. Select the user.
3. In the **Details** tab, add the suffix **-text** at the end of the user's email in the email field. For example, if the email is GregH@HCC.com@houston.com, the field will read: GregH@HCC.com-text

text.

The screenshot shows the 'Edit contact: Greg Harrison' form. The form is divided into several sections. At the top, there are tabs for 'DETAILS', 'USER SECURITY', 'DISTRIBUTION MATRIX', 'HISTORY', and 'CONTACT GROUPS'. Below the tabs, there are 'Cancel' and 'Save' buttons. The form fields include: Company (Houston Contracting), Department (Select a department), Type (HC), Title (Select a title), * First name (Greg), * Last name (Harrison), * Contact ID (GHA), Position, Tags (Select a tag...), Phone, Mobile, Fax, Email (Greg.H@HCC.com), External contact (checkbox), Preferred send method (Email), Address 1, Address 2, City, State, Postcode, Country (Select a country), and Remarks. The email field is highlighted with a red box. There are 'Update email' and 'Test email' links next to the email field. At the bottom, there are checkboxes for 'Make contact inactive', 'Include inactive contact in filters', and 'Make contact restricted'. The footer shows '© 2021 InEight Inc. | v_21.05.00' and the 'INEIGHT' logo.

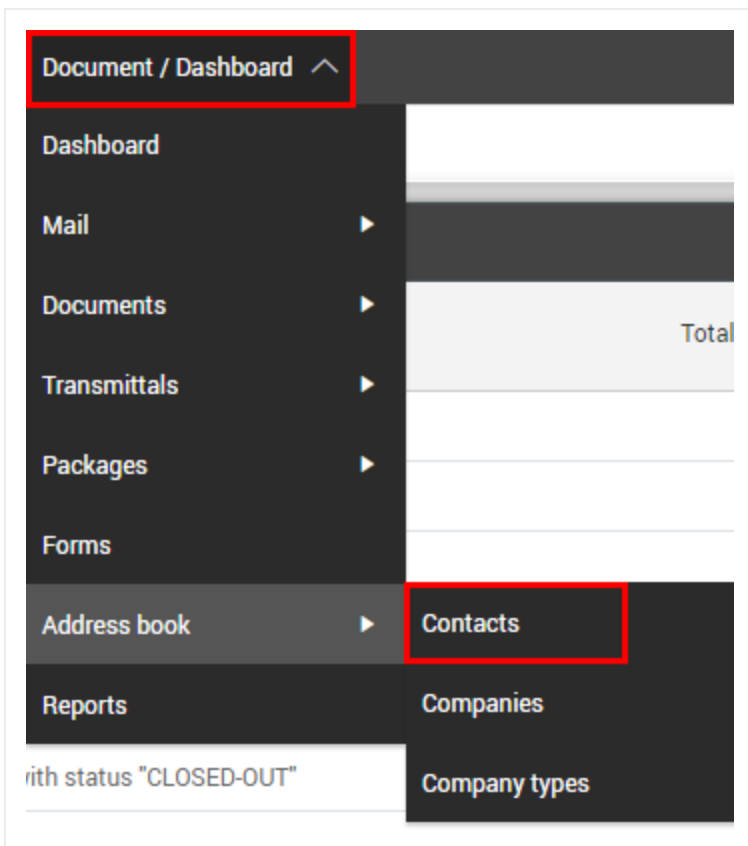
4. Click **Save**.

2.12 VIEWING USER HISTORY

User history tracks user actions within the project, no matter which module they are currently working in. User history tracks user usage and allows an administrator to verify their access for certain modules.

2.12.1 To view user history:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.



2. Select the user.

3. Click the **History** tab.

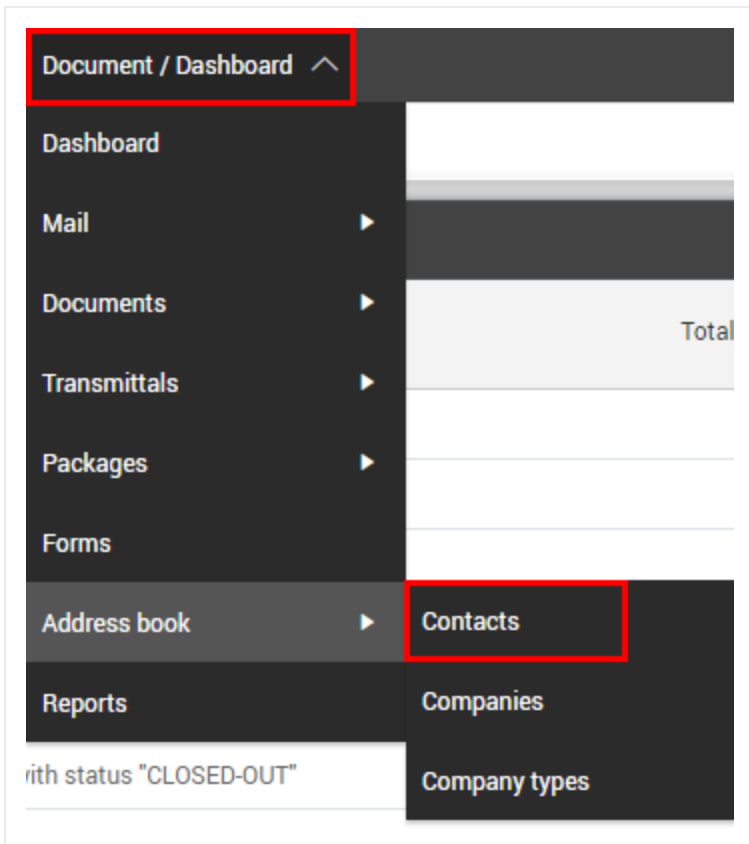
Date	Event Type	Action By	Description
18-06-21 10:24 AM	Changed Security Group Details	Greg Harrison (Houston Contracting)	More Information
14-01-21 02:06 PM	Document Rule Assigned	Joe Fredericks (Houston Contracting)	More Information
29-10-20 06:16 PM	Document Rule Assigned	Greg Harrison (Houston Contracting)	More Information
22-10-20 02:49 PM	Assigned as Project Administrator	Project Analysis (QA Software Pty. Ltd.)	More Information
22-10-20 02:49 PM	Assigned as Primary Administrator	Project Analysis (QA Software Pty. Ltd.)	More Information
22-10-20 02:46 PM	Changed Security Group Details	Project Analysis (QA Software Pty. Ltd.)	More Information
22-10-20 02:45 PM	Assigned to Security Group	Project Analysis (QA Software Pty. Ltd.)	More Information
22-10-20 02:34 PM	Contact Created	Project Analysis (QA Software Pty. Ltd.)	More Information

2.13 MARKING A CONTACT AS A SERVICE ACCOUNT

A project might want to mark a contact as a service account, meaning it will only be visible to the project administrator. This is useful for integrations with other systems.

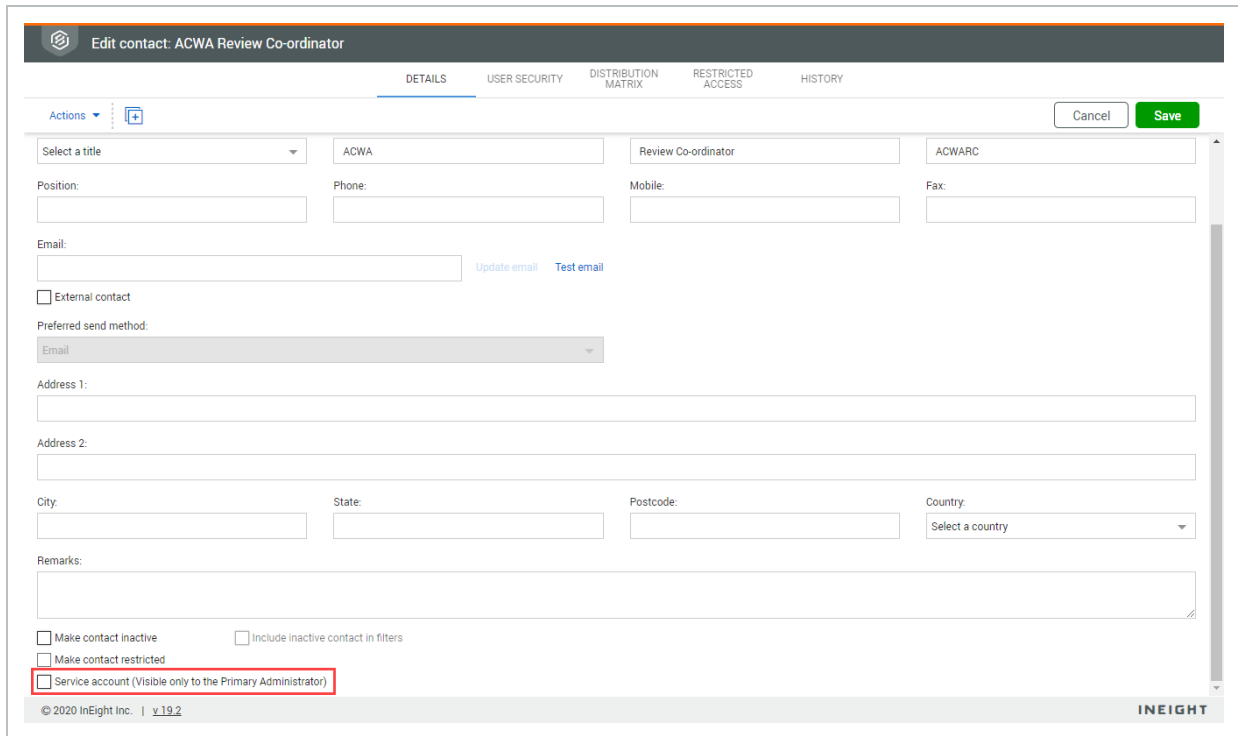
2.13.1 To mark a contact as a service account:

1. From the **Module Menu**, hover over **Address book** and select **Contacts**.



2. Select the user.

3. Scroll down and select the **Service account** check box.



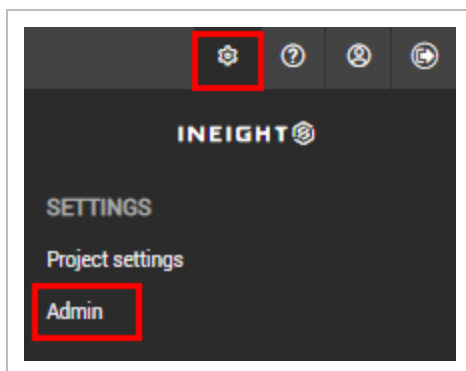
The screenshot shows the 'Edit contact: ACWA Review Co-ordinator' form. The form is divided into several sections: 'Details', 'User Security', 'Distribution Matrix', 'Restricted Access', and 'History'. The 'Details' section is active and contains fields for 'Select a title', 'ACWA', 'Review Co-ordinator', 'ACWARC', 'Position', 'Phone', 'Mobile', 'Fax', 'Email', 'External contact', 'Preferred send method', 'Address 1', 'Address 2', 'City', 'State', 'Postcode', 'Country', and 'Remarks'. At the bottom of the form, there are four checkboxes: 'Make contact inactive', 'Include inactive contact in filters', 'Make contact restricted', and 'Service account (Visible only to the Primary Administrator)'. The 'Service account' checkbox is highlighted with a red box. The form also includes 'Cancel' and 'Save' buttons at the top right and a footer with '© 2020 InEight Inc. | v.19.2' and the 'INEIGHT' logo.

2.14 CREATING A SECURITY GROUP

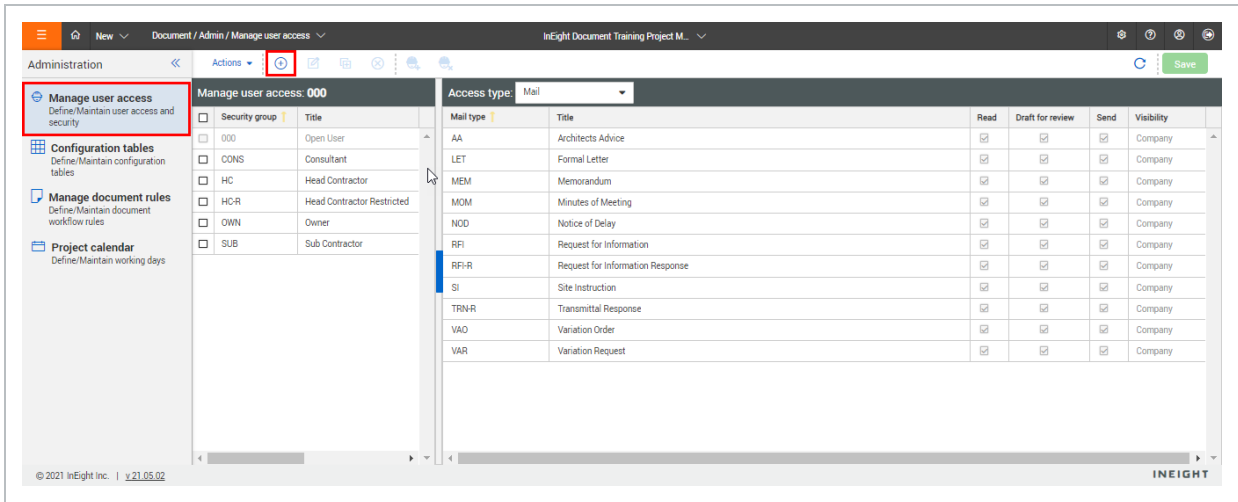
To make a contact a user of InEight Document, they must be added to a security group. A security group controls access to mail types, transmittal types, form types and document administration functions by users allocated to the group.

2.14.1 To create a security group:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Manage user access** and click the **plus icon**.



3. Fill in the details of the new security group.

- 4. Select the default user security access level to each of the InEight Document modules.

Add new security group [X]

*Security group: *Title:

Description:

Default user security

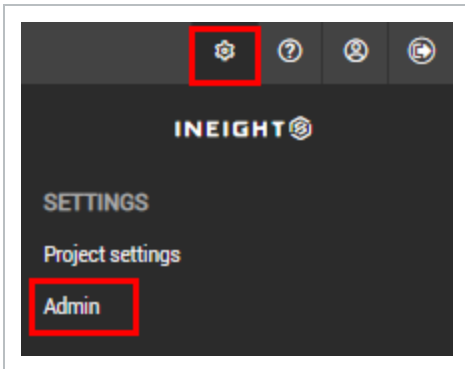
Standard mail:	Unregistered mail:
<input type="text" value="Personal"/>	<input type="text" value="None"/>
Folders:	Documents:
<input type="text" value="None"/>	<input type="text" value="View"/>
Packages:	Transmittals:
<input type="text" value="None"/>	<input type="text" value="Company"/>
Published report:	Tasks:
<input type="text" value="None"/>	<input type="text" value="None"/>
Gallery:	Lots:
<input type="text" value="None"/>	<input type="text" value="None"/>

- 5. Click **Save**.

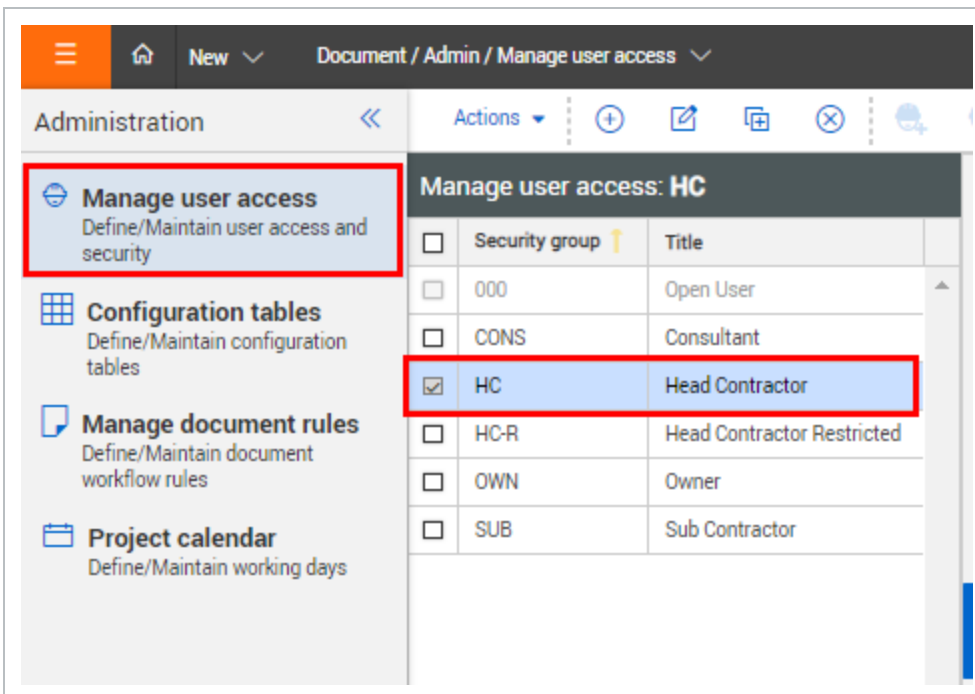
2.15 CONFIGURING SECURITY GROUP ACCESS BY TYPE

2.15.1 To configure security group access by type:

1. Click the **cogwheel icon** and select **Admin**.

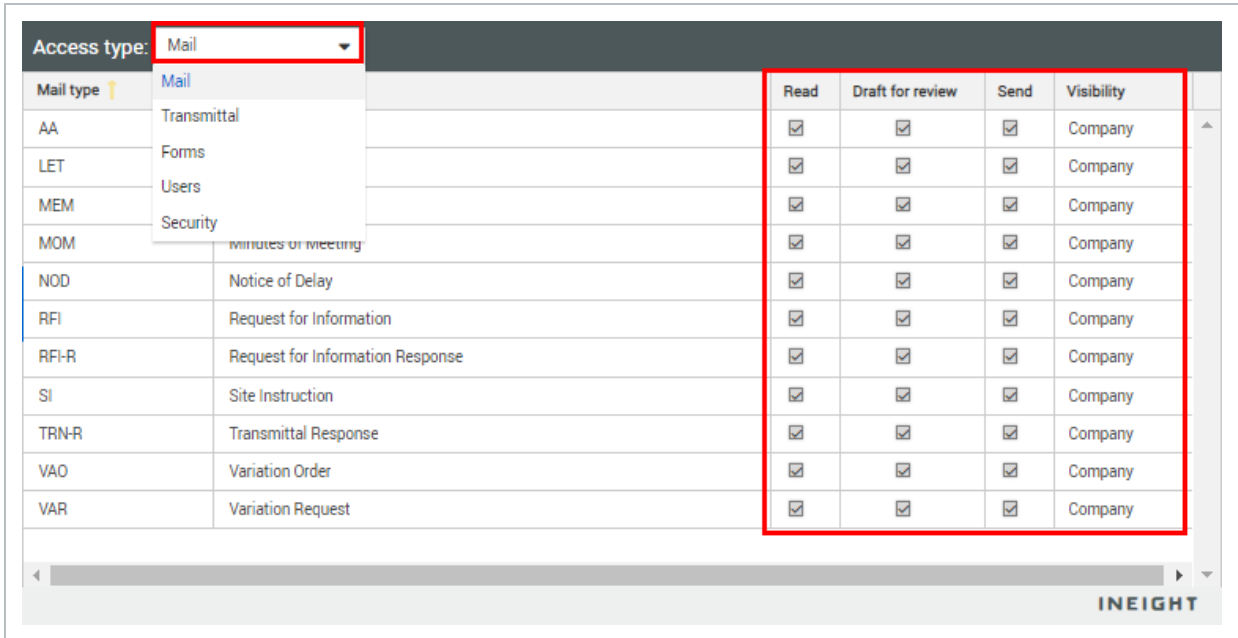


2. Select **Manager user access** and select the security group.



3. Select the module from the **Access type** drop-down menu.

4. Select the check boxes to set the access levels for each item.



5. Click **Save**.

See the tables below for information on each setting:

2.15.2 Mail type access

Setting	Description
Read	Gives the user access to view but not create mail of this type.
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.
Send	Gives the user access to view, create and send mail of this type.
Attach files	Gives the user the ability to attach files to mail of this type.
Visibility	Select the required visibility for each mail type for users assigned to this security group.

2.15.3 Transmittal type access

Setting	Description
Read	Gives the user access to view but not create transmittals of this type.
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.
Send	Gives the user access to view, create and send transmittals of this type.

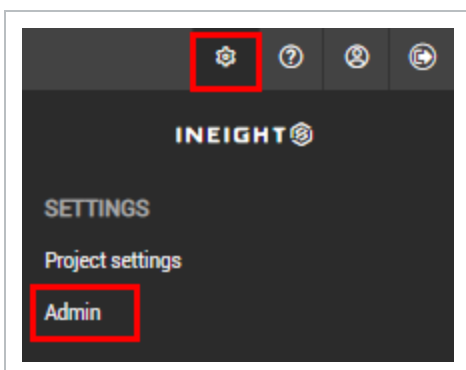
2.15.4 Forms type access

Setting	Description
Read	Gives the user access to view but not create forms of this type.
Send	Gives the user access to view, create and send forms of this type.

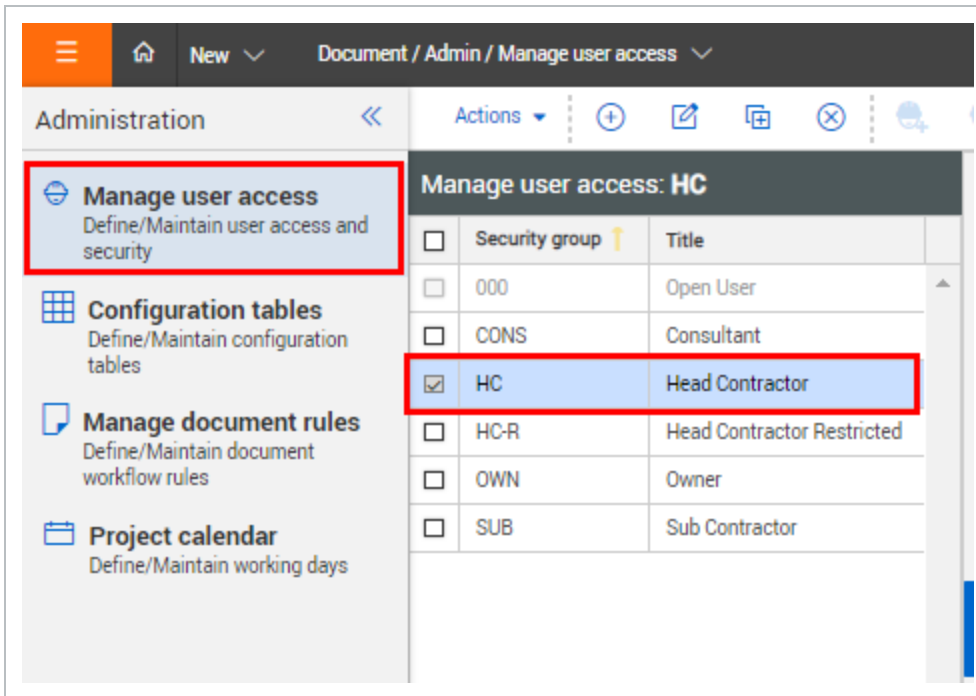
2.16 DELEGATING ADMIN FUNCTIONS FOR A SECURITY GROUP

2.16.1 To delegate admin functions for a security group:

1. Click the **cogwheel icon** and select **Admin**.

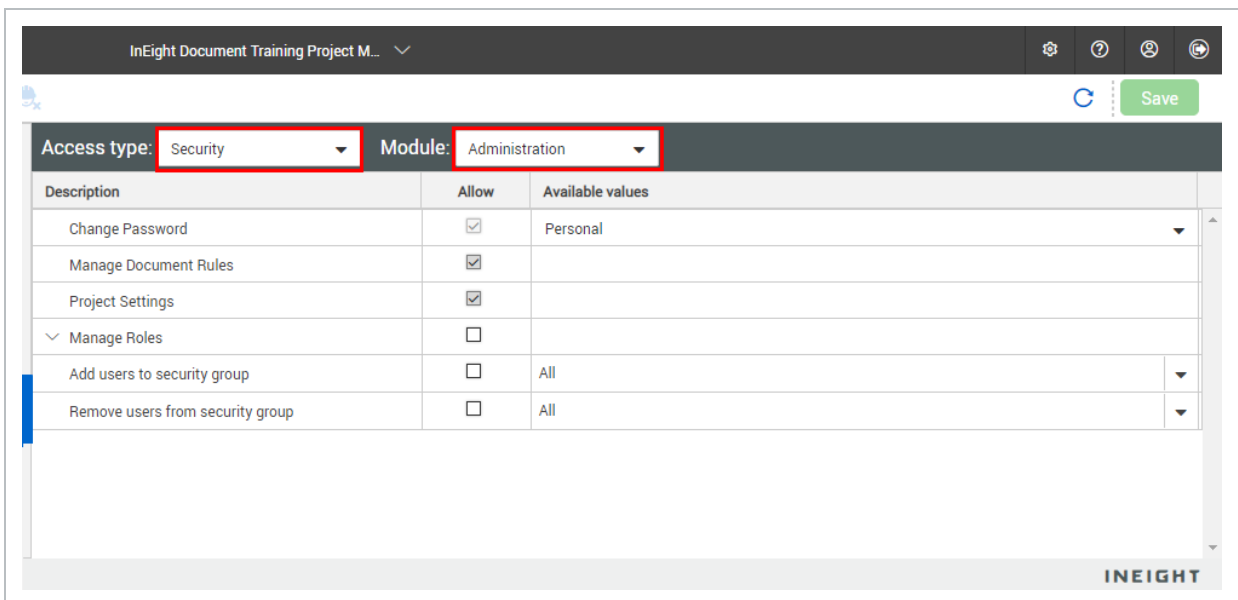


2. Select **Manage user access** and select the security group.



3. In the **Access type** drop-down menu, select **Security**.

4. In the **Module** drop-down menu, select the relevant module.



See the table below for a list of settings in each module:

2.16.2 Administration

Setting	Description
Change Password	Allows passwords to be changed at a personal or company level.
Manage Document Rules	Allows users to change upload, review Y/N, review initiator, review team and distribution rules.
Project Settings	Allows users to change project settings.
Manage Roles	Allows users to manage user roles.

2.16.3 Configuration tables

Setting	Description
Create New	Allows users to create items in configuration tables that you specify in the Available values drop-down menu.
Edit	Allows users to edit items in configuration tables that you specify in the Available values drop-down menu.
Delete	Allows users to delete items in configuration tables that you specify in the Available values drop-down menu.

2.16.4 Document

Setting	Description
Change Document Details	Allows document details to be changed at a personal or company level. This includes both standard and custom fields.
Delete Documents	Allows documents to be deleted at a personal or company level.

Setting	Description
Replace/Remove View Files	Allows view files to be removed or replaced at a personal or company level.
Transfer Document Ownership	Allows document ownership to be transferred at a personal or company level.
Export Documents	Allows documents to be exported at a personal or company level.
Synchronize Documents	Allows documents to be synchronized at a personal or company level.
Apply Pre Stamp	Allows pre stamps to be applied to documents.
Apply Post Stamp	Allows post stamps to be applied to documents.
Apply QR Code	Allows QR stamps to be manually managed from the Documents register. This is activated only when QR codes are enabled on the project.
Manage tags	Allows users to manage Document tags from the Documents register.
Add/Edit tags on Documents	Allows users to add or edit tags to the document details.
Restore Documents	Allows deleted documents to be restored.

2.16.5 Reports

Setting	Description
Enable/Disable scheduled Reports	Allows the administrator to have access to company or self-created reports. When set to <i>Reports scheduled by my company</i> , the administrator can disable reports created by another user in the company.

NOTE

- Users given permission for one or more of these functions can only apply the function to documents they have access to.
- The settings for the **Open User** security group cannot be changed. This group gives project administrators full access to all mail types within InEight Document Mailboxes.
- Security Levels are allocated to users via the **Manage User Access** screen, or from within the **Address book** using the **User Security** tab.
- New users added to a security group inherit the default settings for the group. If default settings are updated for the group, all users of the group will automatically be updated with the new settings.
- 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).
- **Duplicate** is used to create a new security group with similar mail type access, transmittal type access and form type access.
- In **Contacts**, make the security group visible by customizing the register to locate contacts who are not allocated to a security group.
- The options for **Change Document Details** are standard document fields. Custom fields can be added upon request.

2.17 ADDING USERS TO SECURITY GROUPS IN BULK

Project participants requiring access in InEight Document to send communications, upload documents, generate transmittals must be defined as InEight Document users.

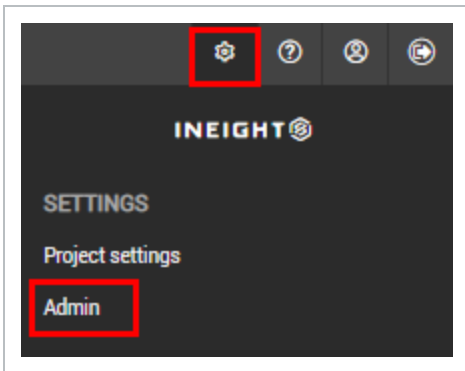
2.17.1 The process of creating a new user involves:

1. Adding the user to the address book.
2. Assigning the user to a security group.
3. Setting the user's access levels to the different modules of InEight Document.
4. Adding the user to a document distribution rule set (optional).

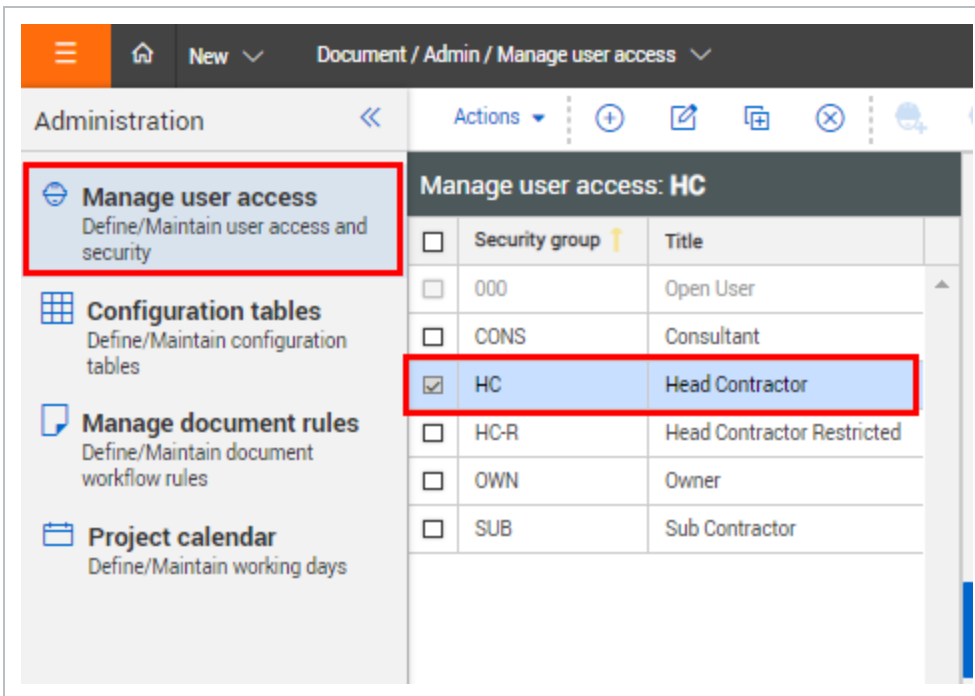
The minimum requirements for enabling InEight Document users are adding them to the address book and allocating them to a security group.

2.17.2 To add users to a security group:

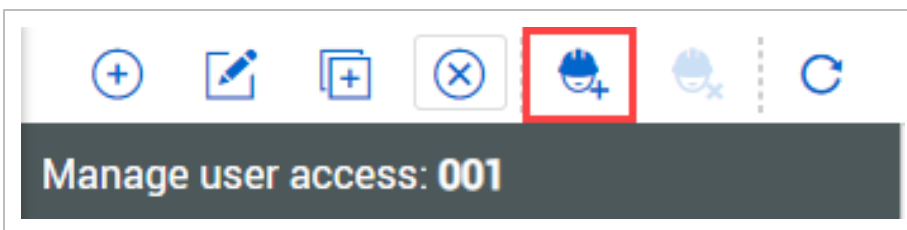
1. Click the **cogwheel icon** and select **Admin**.



2. Select **Manage user access** and select the security group.

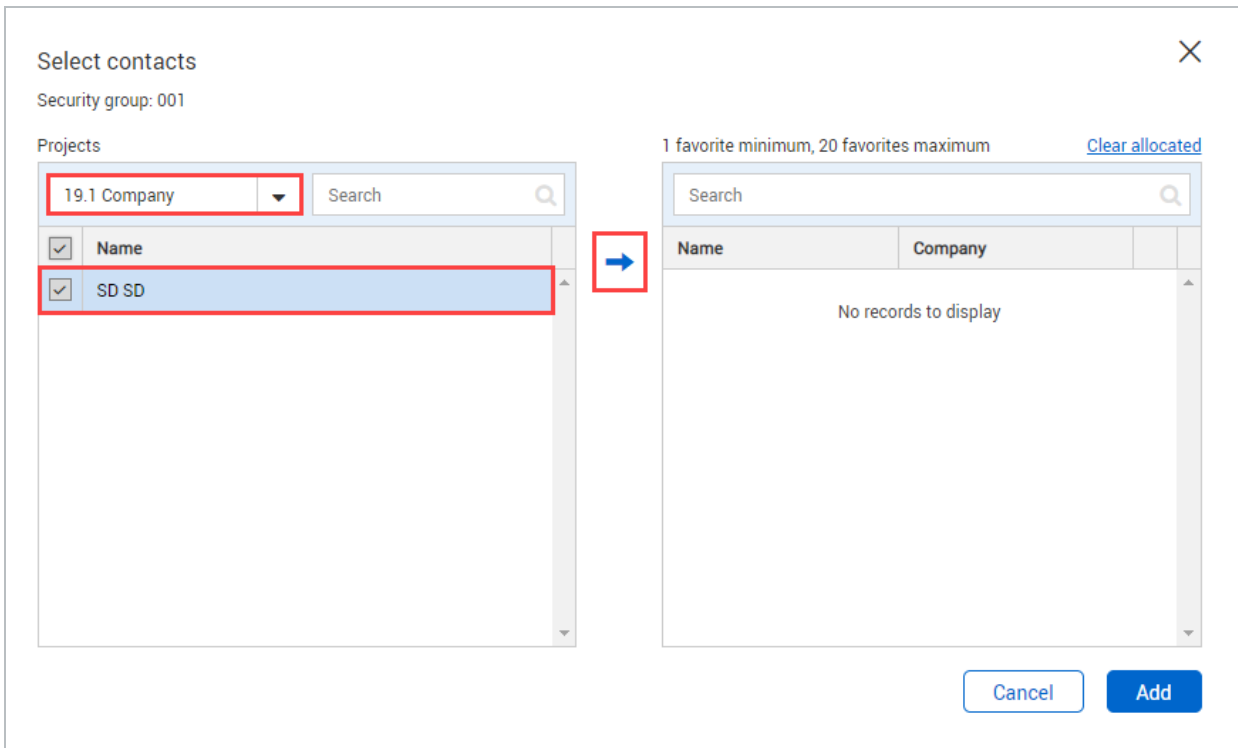


3. Click the **add user icon**.



4. Select the company of the user.

5. Select the user(s) and click the **arrow icon**.

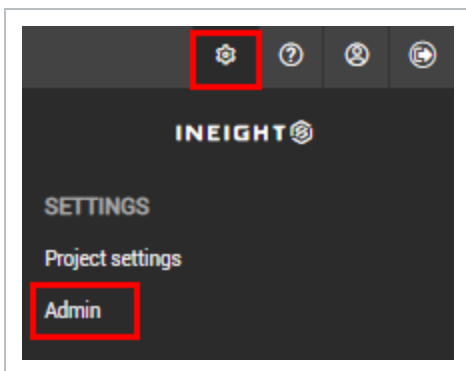


6. Click **Add**.
7. Click **Yes** to confirm.

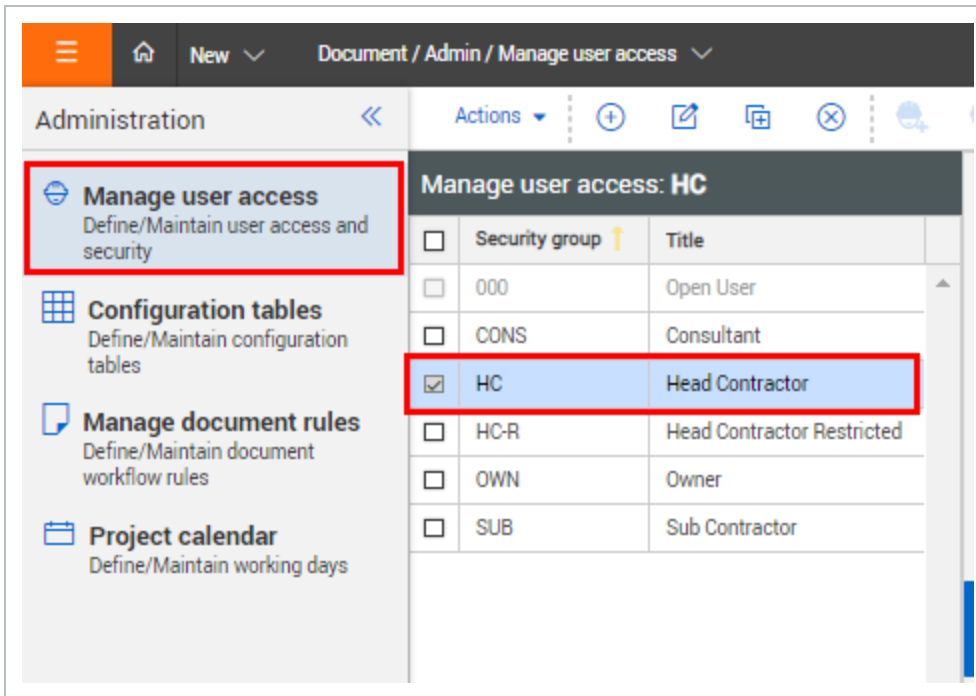
2.18 CONFIGURING USER ACCESS TO MODULES

To configure user access to modules:

1. Click the **cogwheel icon** and select **Admin**.

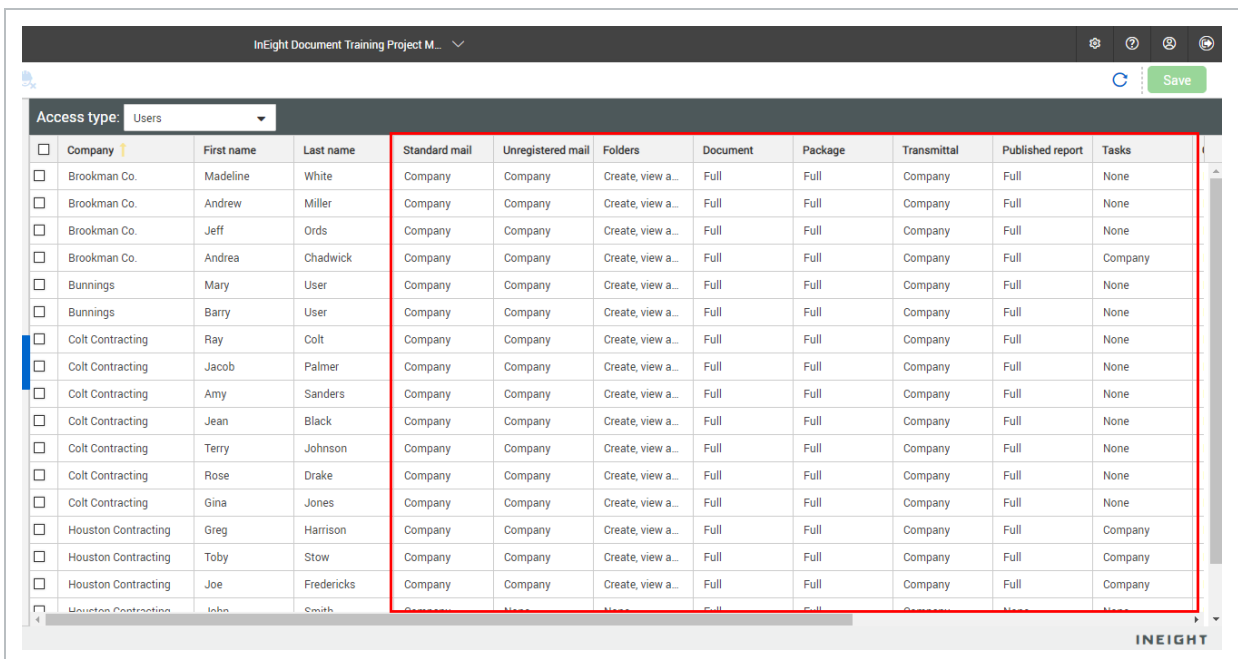


2. Select **Manage user access** and select the security group.



3. In the **Access type** drop-down menu, select **Users**.

4. Select the level of access for each module against each user.



5. Click **Save**.

2.18.1 Select the links below for a list of each module's settings:

2.18.2 Standard mail

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

2.18.3 Unregistered mail

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

2.18.4 Folder

Setting	Description
None	The folder is not visible.
View	The user can view folders and items.
View and allocate items	The user can view folders and add or remove items.
Create, view and allocate items	The user can create new folders and add or remove items.

2.18.5 Document

Setting	Description
None	The user cannot access the Document module.
View	The user can view the Document module.
Full	The user can fully access the Document module.

2.18.6 Package

Setting	Description
None	The user cannot access the Packages module.
View	The user can view the Packages module.
Full	The user can fully access the Packages module.

2.18.7 Transmittal

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

2.18.8 Published report

Setting	Description
None	The user cannot access the Published report module.
View	The user can view the Published report module.
Full	The user can fully access the Published report module.

2.18.9 Defects

Setting	Description
None	The user cannot access the Defects module.
View	The user can view the Defects module.
Full	The user can fully access the Defects module.

2.18.10 Tasks

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

2.18.11 Gallery

Setting	Description
None	The user cannot access the Gallery module.
View	The user can view the Gallery module.
Full	The user can fully access the Gallery module.

2.18.12 Lots

Setting	Description
None	The user cannot access the Lots module.

Setting	Description
View	The user can view the Lots module.
Full	The user can fully access the Lots module.

2.18.13 Forms

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

2.18.14 Sustainability

Setting	Description
None	The user cannot access the Sustainability module.
View	The user can view the Sustainability module.
Full	The user can fully access the Sustainability module.

2.18.15 Checklist

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

2.18.16 Vendor data

Setting	Description
None	The user cannot access the Vendor data module.
View	The user can view the Vendor data module.
Full	The user can fully access the Vendor data module.

2.18.17 Manuals

Setting	Description
None	The manual is not visible.
View	The user can view manuals and items.
View and allocate items	The user can view manuals and add or remove items.
Create, view and allocate items	The user can create new manuals and add or remove items.

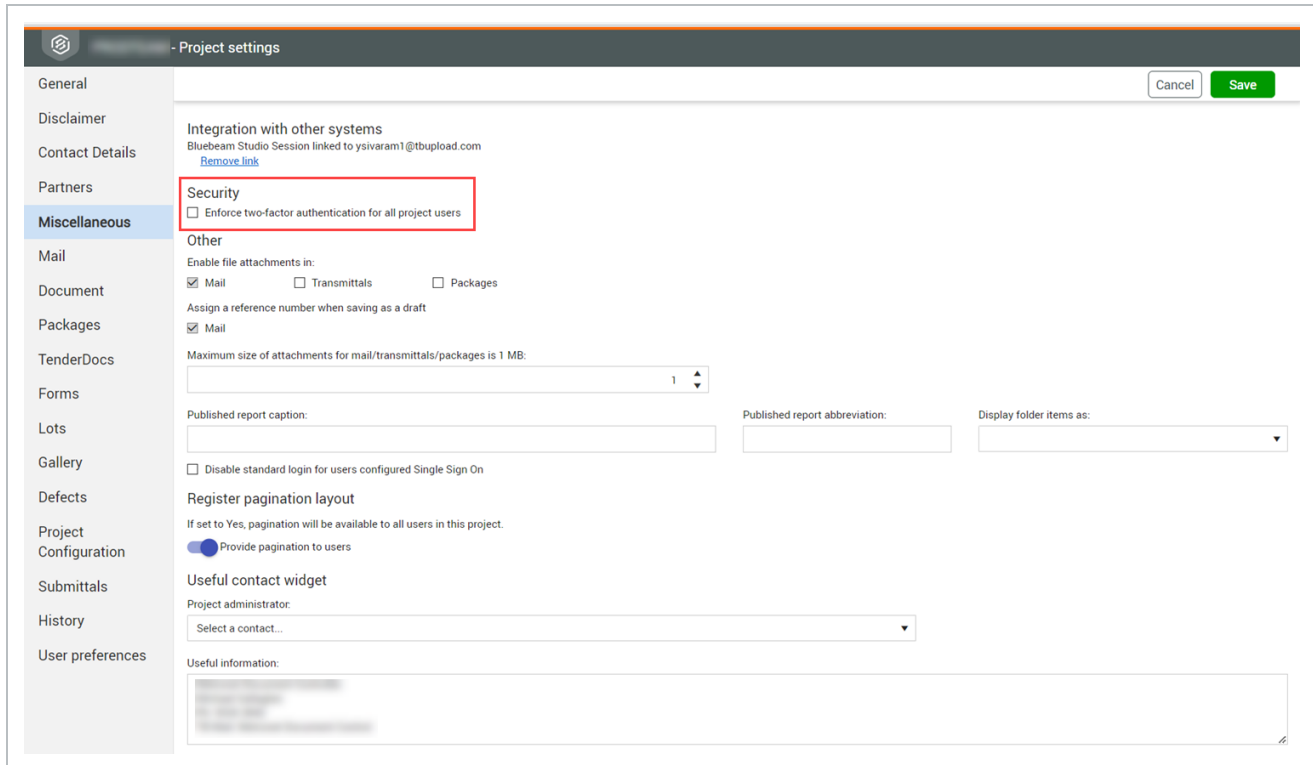
2.18.18 Document holding area

Setting	Description
None	The user cannot access the Document holding area module.
View	The user can view the Document holding area module.
View and upload	The user can view and upload documents to the Document holding area module.
View, upload and process	The user can view, upload and process documents in the Document holding area module.

2.19 ENFORCE TWO-FACTOR AUTHENTICATION

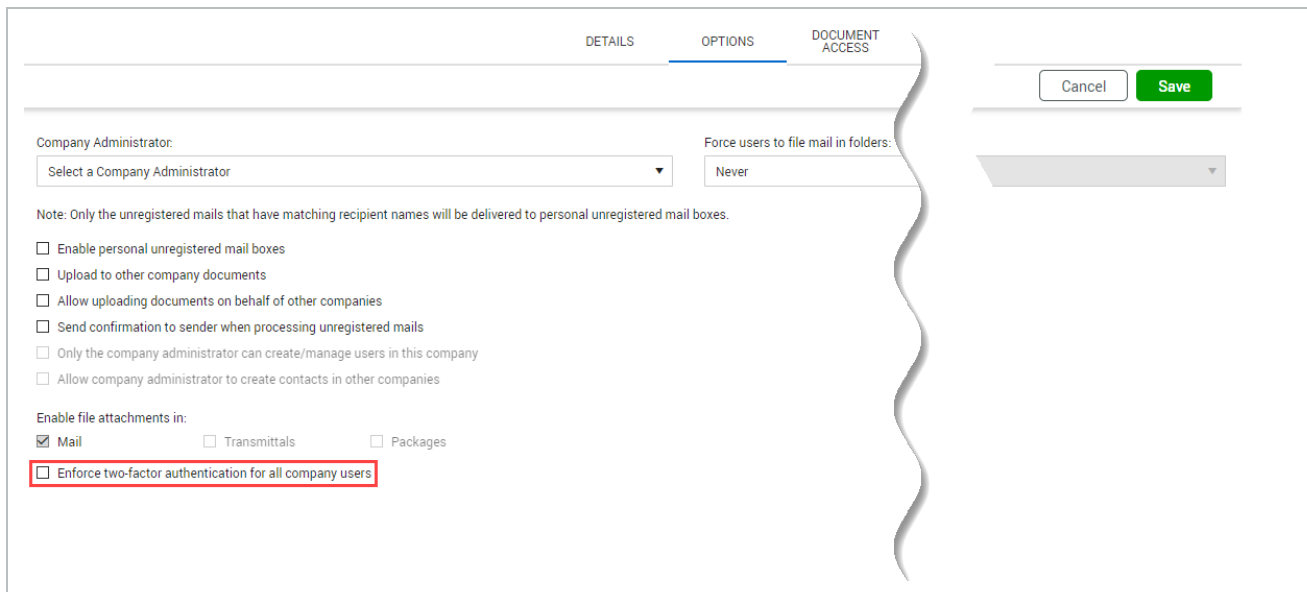
Typically, two-factor authentication is an option offered to each user. When your company or project requires this extra layer of security, you can enforce its implementation using project- or company-level settings.

To enforce two-factor authentication at the project level, select the **Enforce two-factor authentication for all users** check box in the Miscellaneous project settings.



The screenshot shows the 'Project settings' interface. On the left is a navigation menu with categories: General, Disclaimer, Contact Details, Partners, Miscellaneous (selected), Mail, Document, Packages, TenderDocs, Forms, Lots, Gallery, Defects, Project Configuration, Submittals, History, and User preferences. The main content area is titled 'Project settings' and includes a 'Cancel' button and a green 'Save' button. Under the 'Miscellaneous' tab, the 'Security' section is highlighted with a red box and contains the checkbox 'Enforce two-factor authentication for all project users'. Below this are sections for 'Other' (file attachments), 'Register pagination layout', and 'Useful contact widget'.

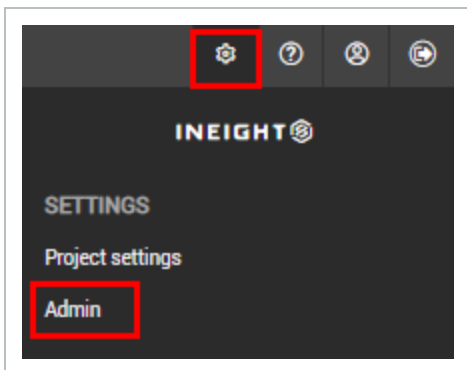
To enforce two-factor authentication for a company, select the **Enforce two-factor authentication for all company users** check box on the Options tab of the company's address book (Address book > Companies).



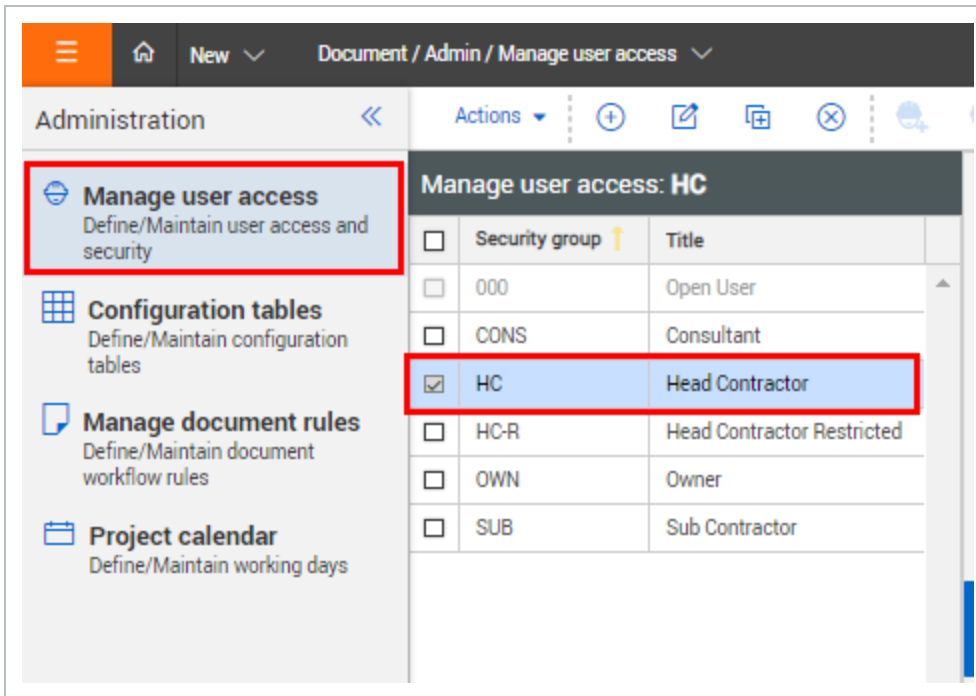
2.20 CONFIGURING USER ACCESS TO MODULES

To configure user access to modules:

1. Click the **cogwheel icon** and select **Admin**.

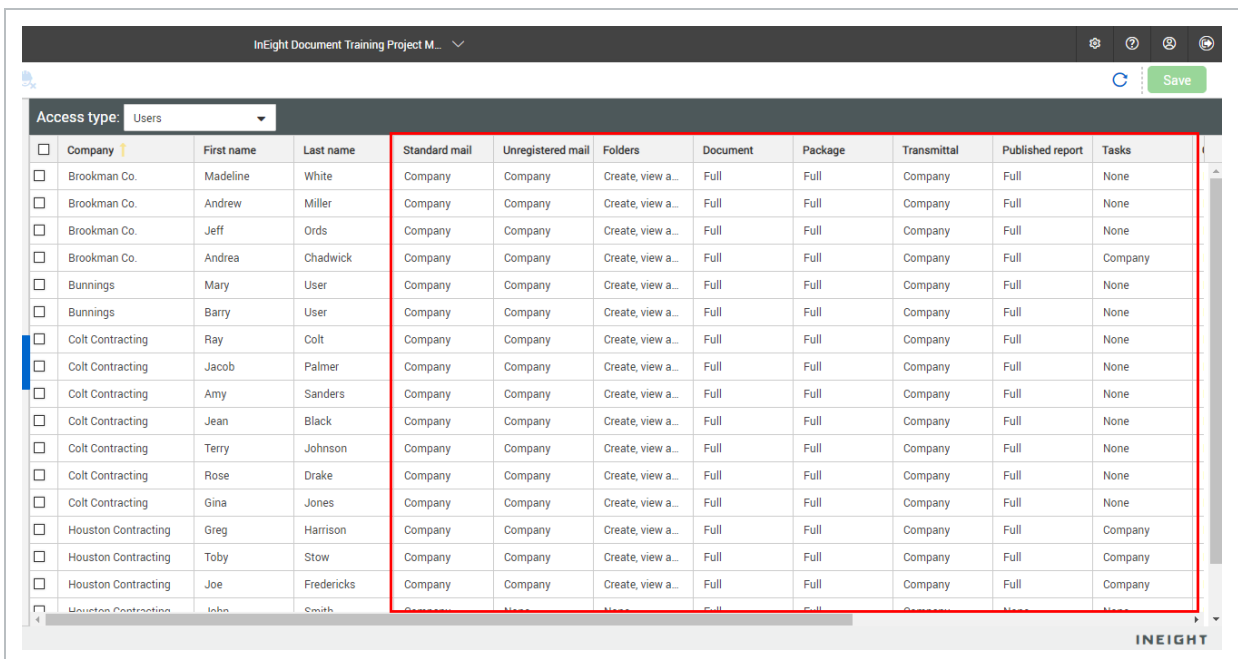


2. Select **Manage user access** and select the security group.



3. In the **Access type** drop-down menu, select **Users**.

4. Select the level of access for each module against each user.



5. Click **Save**.

2.20.1 Select the links below for a list of each module's settings:

Standard mail

2.20.2 Standard mail

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

Unregistered mail

2.20.3 Unregistered mail

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

Folder

2.20.4 Folder

Setting	Description
None	The folder is not visible.
View	The user can view folders and items.
View and allocate items	The user can view folders and add or remove items.
Create, view and allocate items	The user can create new folders and add or remove items.

Document

2.20.5 Document

Setting	Description
None	The user cannot access the Document module.
View	The user can view the Document module.
Full	The user can fully access the Document module.

Package

2.20.6 Package

Setting	Description
None	The user cannot access the Packages module.
View	The user can view the Packages module.
Full	The user can fully access the Packages module.

Transmittal

2.20.7 Transmittal

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

Published report

2.20.8 Published report

Setting	Description
None	The user cannot access the Published report module.
View	The user can view the Published report module.
Full	The user can fully access the Published report module.

Defects

2.20.9 Defects

Setting	Description
None	The user cannot access the Defects module.
View	The user can view the Defects module.
Full	The user can fully access the Defects module.

Tasks

2.20.10 Tasks

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

Gallery

2.20.11 Gallery

Setting	Description
None	The user cannot access the Gallery module.
View	The user can view the Gallery module.
Full	The user can fully access the Gallery module.

Lots

2.20.12 Lots

Setting	Description
None	The user cannot access the Lots module.
View	The user can view the Lots module.
Full	The user can fully access the Lots module.

Forms

2.20.13 Forms

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

Sustainability

2.20.14 Sustainability

Setting	Description
None	The user cannot access the Sustainability module.
View	The user can view the Sustainability module.
Full	The user can fully access the Sustainability module.

Checklist

2.20.15 Checklist

Setting	Description
None	The user is not visible.
Personal	The user is in the To , Cc , Bcc or From values in the distribution.
Department	The user of the same department is any of the To , Cc , Bcc or From values in the distribution.
Company	Anyone from the user's company is any of the To , Cc , Bcc or From values.

Vendor data

2.20.16 Vendor data

Setting	Description
None	The user cannot access the Vendor data module.
View	The user can view the Vendor data module.
Full	The user can fully access the Vendor data module.

Manuals

2.20.17 Manuals

Setting	Description
None	The manual is not visible.
View	The user can view manuals and items.
View and allocate items	The user can view manuals and add or remove items.
Create, view and allocate items	The user can create new manuals and add or remove items.

Document holding area

2.20.18 Document holding area

Setting	Description
None	The user cannot access the Document holding area module.
View	The user can view the Document holding area module.
View and upload	The user can view and upload documents to the Document holding

Setting	Description
	area module.
View, upload and process	The user can view, upload and process documents in the Document holding area module.

2.21 VIEW USER ACCESS CONFIGURATION HISTORY

You can see a full audit of changes made to the user access settings from the History page. Access the History page from Admin > Manage user access > Actions > **History**.

The History page shows the following:

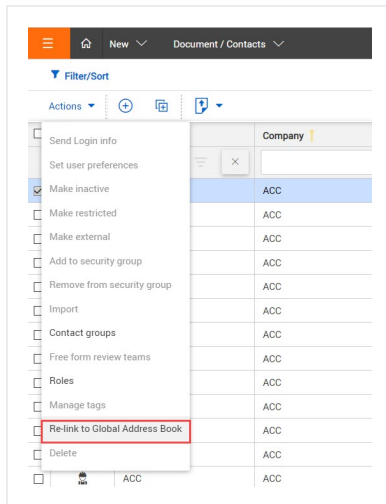
Field	Description
Date	The date the change was made to the setting.
Value	The setting that was changed.
Event type	The type of change made.
Action by	The person that made the change.
Description	The change that was made. Click the ellipsis to see the original value and the new value.

2.22 MAINTAIN THE GLOBAL ADDRESS BOOK

Sometimes updating an entry in the Address book in a project can break the link to the Global Address Book. The Global address status column on the Contacts and Companies registers lets you quickly see if an entry is linked to or unlinked from the Global Address Book and relink it if necessary.

User type	Company ID	Company	Contact ID	Global Address Book Status	Security group	First name	Last name	Email	Phone
	ACC								
	ACC	ACC	ABC	Unlinked	Consultant	ABC	BC	vineght@gmail.com	0356654877
	ACC	ACC	ABC1111111	Unlinked	Consultant	ABC	BC	vineght@gmail.com	0356654877
	ACC	ACC	ABH	Unlinked	Consultant	adv	gh	vineght@gmail.com	0356654877
	ACC	ACC	ABJ	Unlinked	Consultant	AS	B'	vineght@gmail.com	0356654877
	ACC	ACC	ABC	Unlinked	Consultant	AV	VC	vineght@gmail.com	0356654877
	ACC	ACC	CAS	Unlinked	Consultant	CAS	AS	vineght@gmail.com	0356654877

If the entry is unlinked and you want to relink it, you can select it, open the **Actions** menu, and then select **Re-link to Global Address Book**.



The Global Address Book status field is also on the Contact details page. The field is for information only. If you want to relink the status, you must do it from the Address book register.

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CHAPTER 3 – MANAGING PROJECT ADMINISTRATORS

For information on Managing Project Administrators, see the links below.

- 3.1 Update the Project Administrators 119
- 3.2 Assigning Company Administrators 123
 - 3.2.1 To assign company administrators: 124
- 3.3 Manage Administrator History 125

3.1 UPDATE THE PROJECT ADMINISTRATORS

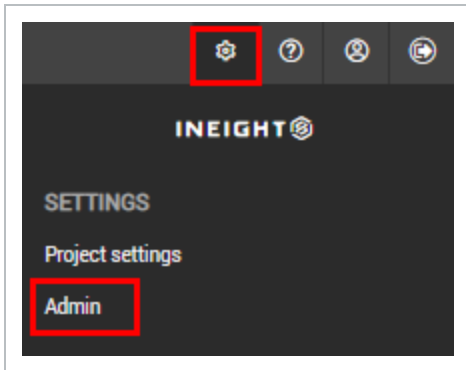
You can update the project administrator when a new administrator joins the project. The administrator can be in the existing administrator company or a new administrator company.

3.1 Step by Step 1 — Update the project administrators in the same company

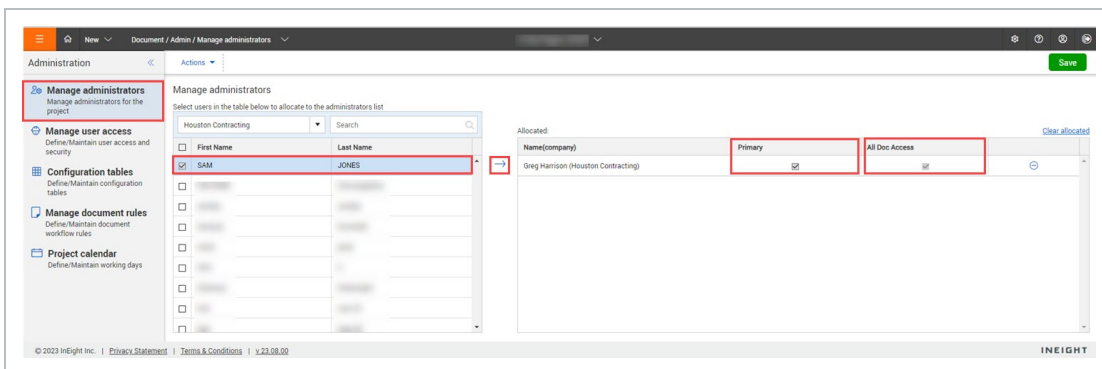
Summary: Update administrator when you want to replace the current administrator or add additional administrators in the same company.

Considerations: Additional project administrators must be from the same company. A project can have more than one administrator but only one primary administrator

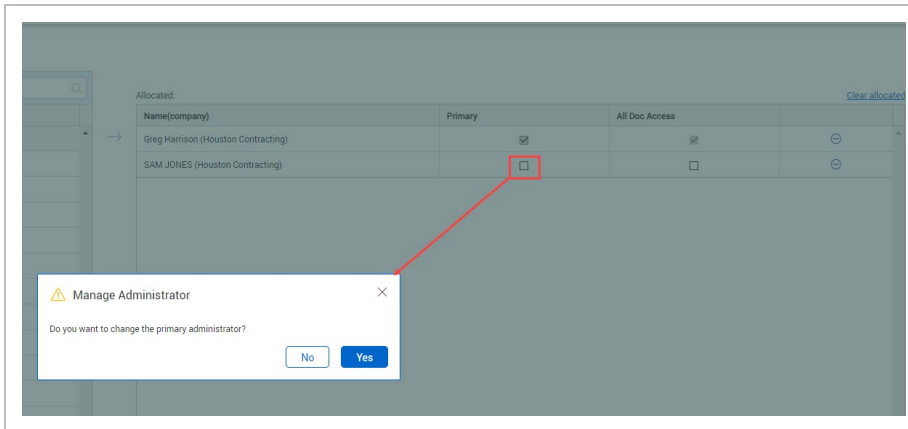
1. Click the **Settings** icon, and then select **Admin**.



2. Select **Manage administrators**. The Manage administrators page opens.
3. Select the company from the drop-down menu.
4. Select the contact and click the **arrow** icon.



5. If the contact is to be the primary administrator, select the **Primary** check box. Document asks whether you want to change the primary administrator.



Click **Yes** to make the contact the new primary administrator.

- If you want to administrator to control access to all documents, select the **All Doc Access** check box.
- Click **Save**.

NOTE

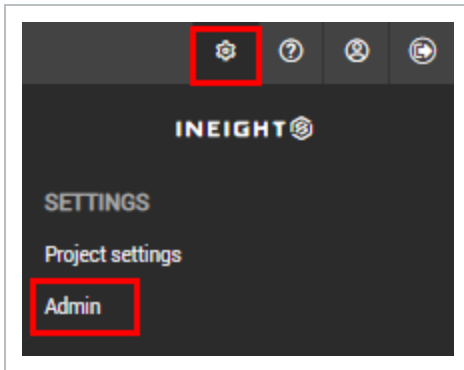
The project administrator normally has access to all project documents in the document module. InEight can change the primary administrator's access to be the same as all other users. In this case the option to define automatic distribution rules is also disabled. Contact InEight for more information on this.

3.1 Step by Step 2 — Update the project administrator to a different company

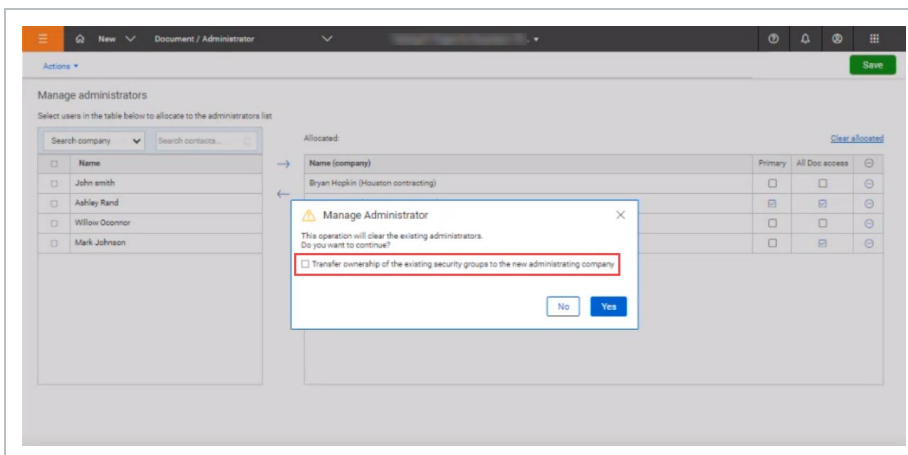
Summary: When a different company takes over as the administrator company of the project, you can add a contact from that company as the project administrator.

Considerations: When you change the administrator company for a project, the ownership of the existing security group stays with the original company unless it is transferred to the new administrating company.

1. Click the **Settings** icon, and then select **Admin**.



2. Select **Manage administrators**. The Manage administrators page opens.
3. Select the new company from the drop-down menu.
4. Select a contact and click the **arrow** icon. The Manage Administrator dialog box opens. The dialog box warns you that the names of the existing administrators are cleared in the operation. It also gives you the option to transfer ownership of the existing security groups to the administering company.



5. Select the check box to transfer ownership of the existing security groups, if needed. If you continue without selecting this box, ownership remains with the original company. Click **Yes**.
6. Click **Save** in the Manage administrators page.

3.2 ASSIGNING COMPANY ADMINISTRATORS

A company administrator can be assigned within each participating company to allow them to manage some administrative functions.

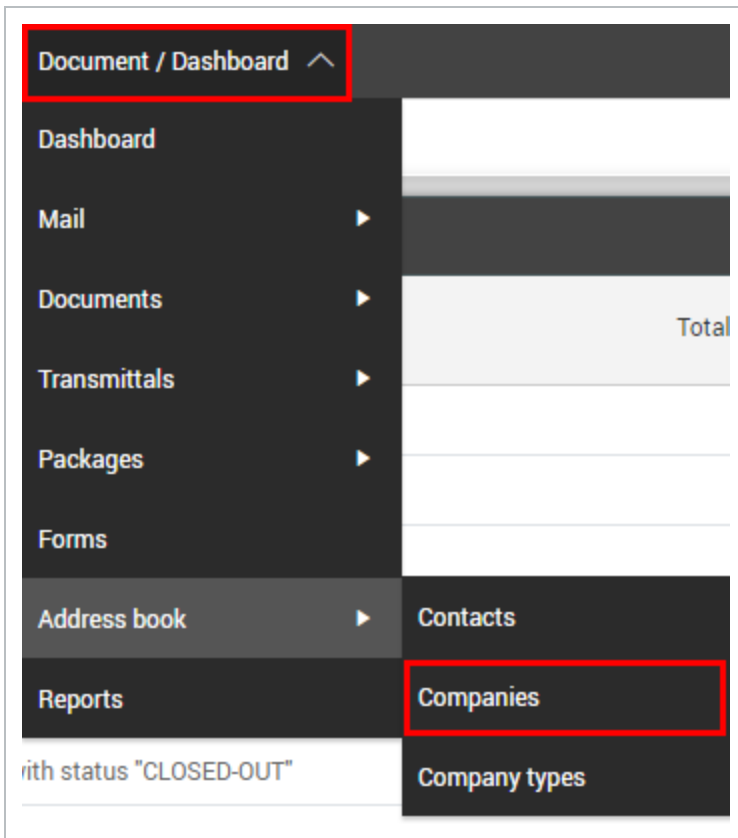
Company administrators can perform the following tasks for users within their own company:

1. Create new users.
2. Edit contacts details within a project address book.
3. Enable and disable users.
4. Change user passwords.
5. Create security groups.
6. Modify security group definitions for groups they have defined.
7. Configure distribution rules.
8. Approve and 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.

3.2.1 To assign company administrators:

1. From the **Module Menu**, hover over **Address book** and select **Companies**.



2. Select the company.
3. In the **Options** tab, select the company administrator from the drop-down menu.

ABC Company

DETAILS **OPTIONS** DOCUMENT ACCESS UNREG NOTIFICATION UPLOAD RULES SINGLE SIGN-ON SETUP HISTORY

Cancel Save

Company Administrator: **Select a Company Administrator** Force users to file mail in folders: Never Allow removing allocated mails from folders: No

Note: Only the unregistered mails that have matching recipient names will be delivered to personal unregistered mail boxes.

Enable personal unregistered mail boxes

Upload to other company documents

Allow uploading documents on behalf of other companies

Send confirmation to sender when processing unregistered mails

Only the company administrator can create/manage users in this company

Allow company administrator to create contacts in other companies

Enable file attachments in:

Mail Transmittals Packages

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4. Click **Save**.

NOTE

- The company administrator will need to be notified by email outside of InEight Document of this change in status.
- The ability for a company to create 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.
- Enabling this function gives them the ability to create companies and contracts, and also edit the details of any existing company or contact.
- A feature can be enabled to assign a mandatory ABN number to all new companies. When creating a new company, type the ABN first to auto complete the company details if it already exists.

3.3 MANAGE ADMINISTRATOR HISTORY

You can see a full audit of changes made to the project administrator settings from the History page. Access the history page from Admin > Manage > Administrators > Actions > **History**.

NOTE

Only the primary administrator can view the History page.

The History page shows the following:

Field	Description
Date	The date the change was made to the setting.
Value	The setting that was changed.
Event type	The type of change made.
Action by	The person that made the change.
Description	The change that was made. Click the ellipsis to see the original value and the new value.

You can sort by any of the columns, and search across the history.

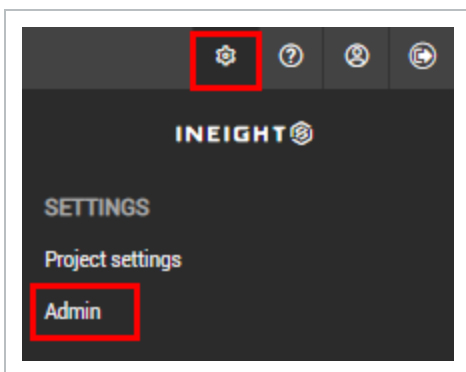
CHAPTER 3 – MANAGING PROJECT ADMINISTRATORS

For information on Managing Project Administrators, see the links below.

3.0.1 Updating the Project Administrators

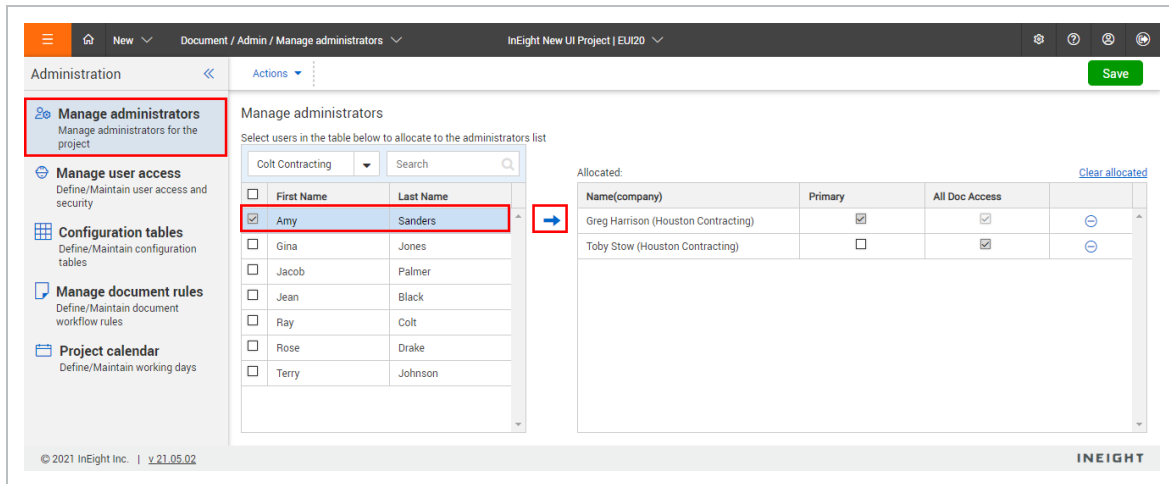
3.0.1.1 To update the additional project administrators:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Manage administrators** and select the company from the drop-down menu.

3. Select the contact and click the **arrow icon**.



4. Click **Save**.

NOTE

- The role of additional project administrator can be assigned to more than one user within the same company by adding them to the list of administrators without selecting the **Primary** check box.
- For additional project administrators, it is possible to control access to all documents by selecting the **All Doc Access** check box. By default, they do not get access.
- The project administrator normally has access to all project documents in the document module. InEight can change the primary administrator's 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.

3.0.2 Assigning 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:

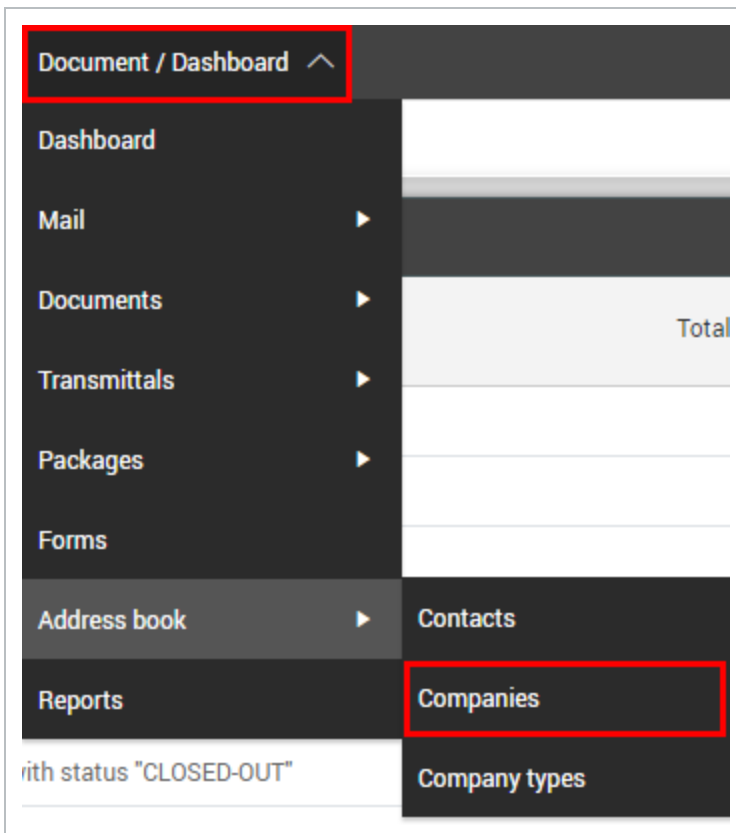
1. Create new users.
2. Edit contacts details within a project address book.
3. Enable and disable users.
4. Change user passwords.

5. Create security groups.
6. Modify security group definitions for groups they have defined.
7. Configure distribution rules.
8. Approve and 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.

3.0.2.2 To assign company administrators:

1. From the **Module Menu**, hover over **Address book** and select **Companies**.



2. Select the company.

3. In the **Options** tab, select the company administrator from the drop-down menu.

The screenshot shows the 'Options' tab for a company administrator in the InEight system. The 'Options' tab is highlighted with a red box. The 'Company Administrator' dropdown menu is also highlighted with a red box and contains the text 'Select a Company Administrator'. Other settings include 'Force users to file mail in folders' set to 'Never' and 'Allow removing allocated mails from folders' set to 'No'. There are several checkboxes for enabling features like personal unregistered mail boxes, document uploads, and file attachments.

4. Click **Save**.

NOTE

- The company administrator will need to be notified by email outside of InEight Document of this change in status.
- The ability for a company to create 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.
- Enabling this function gives them the ability to create companies and contracts, and also edit the details of any existing company or contact.
- A feature can be enabled to assign a mandatory ABN number to all new companies. When creating a new company, type the ABN first to auto complete the company details if it already exists.

3.0.3 Manage Administrator History

You can see a full audit of changes made to the project administrator settings from the History page. Access the history page from Admin > Manage > Administrators > Actions > **History**.

NOTE

Only the primary administrator can view the History page.

The History page shows the following:

Field	Description
Date	The date the change was made to the setting.
Value	The setting that was changed.
Event type	The type of change made.
Action by	The person that made the change.
Description	The change that was made. Click the ellipsis to see the original value and the new value.

You can sort by any of the columns, and search across the history.

CHAPTER 4 – APPLYING CONFIGURATION TABLE SETTINGS

For information on Applying Configuration Table Settings, see the links below.

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4.12 View configuration history	155

4.1 ACCESSING CONFIGURATION TABLES

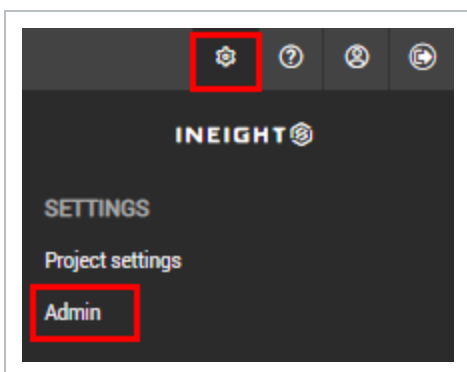
Throughout InEight Document there are attributes that can be assigned to mail, documents, transmittals, packages and other menus from drop-down menus.

The values in the drop-menus are defined on a per project basis via the InEight Document configuration tables.

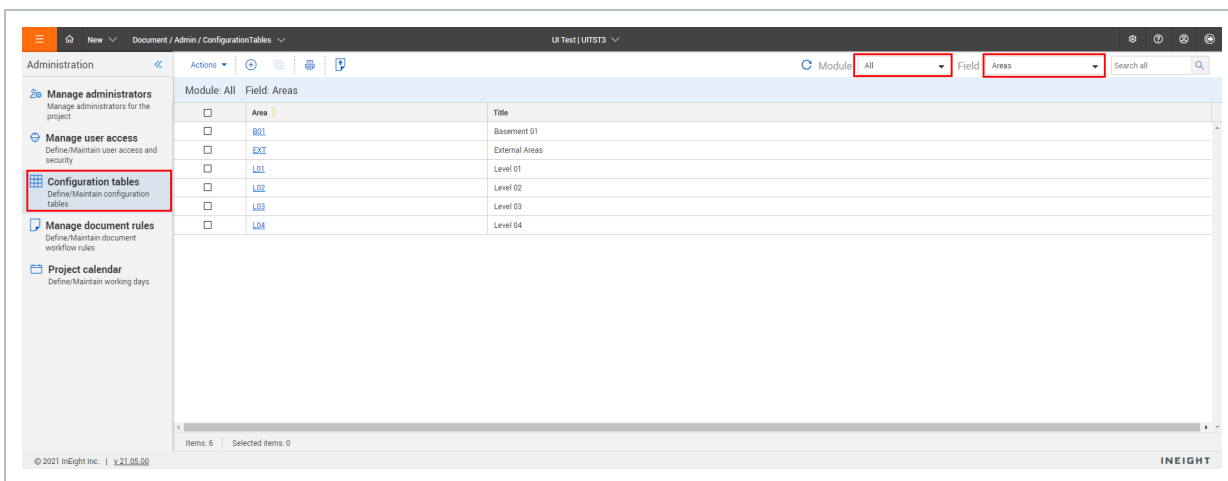
4.1 Step by Step 1 — Access configuration tables

Summary: You can access all configuration tables from the Administration area.

1. Click the **Settings** icon, and then select **Admin**.



2. Select **Configuration tables** and select the module from the drop-down menu.
3. Select the configuration table from the Field drop-down menu.



What's next: You can now perform these tasks:

- To add a new configuration table, click the **Add** icon.
- To edit a configuration table, click the link in the **Area** field.
- To deactivate one or more configuration tables, select them, and then select **Make inactive** from the **Actions** menu.
- To delete one or more configuration tables, select them, and then select **Delete** from the **Actions** menu.

See the tables below for a list of configuration settings.

4.1.1 Documents

Field	Description
Areas	Used for additional classifications. For example, stages of a road project.
Categories	Used to further classify a drawing type in the system and is part of the upload rule.
Disciplines	Disciplines are mandatory. They are part of the upload rule, distribution of documents, triggering a workflow and determining review teams.
Locations	The physical delimiters on a project.
Status Codes	A mandatory field used to indicate 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 that is part of the upload rule.

4.1.2 Mail

Field	Description
Areas	This field can also be used in mail as a search filter.
Disciplines	This field can also be used in mail as a search filter.
Locations	This field can also be used in mail as a search filter.
Mail Status Codes	This status can assist when managing large volumes of mail. The status is applied when creating or responding to mail.

4.1.3 Address Book

Field	Description
Contact Title	Used when adding names to the address book. For example, Mr.
Trade	Used to categorize companies. Companies can be allocated to more than one trade.

NOTE

- You can delete existing configuration tables by clicking Actions and selecting Delete.
- Use the module drop down list (default value is **All**) to select the configuration tables related to a single module only.
- It is possible to make configuration table values inactive if they are no longer required by selecting the **Make inactive** check box.
- Configuration table values can be exported to Microsoft Excel by clicking the **export icon**.

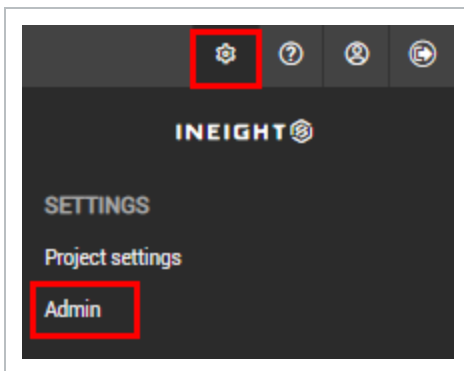
4.2 DEFINING REVISIONS SETTINGS

Revisions are a mandatory attribute of controlled documents in InEight Document. There is a rule in InEight Document that each time a document is uploaded, the revision number must be greater than the previous. This is controlled via a sequence number against each revision.

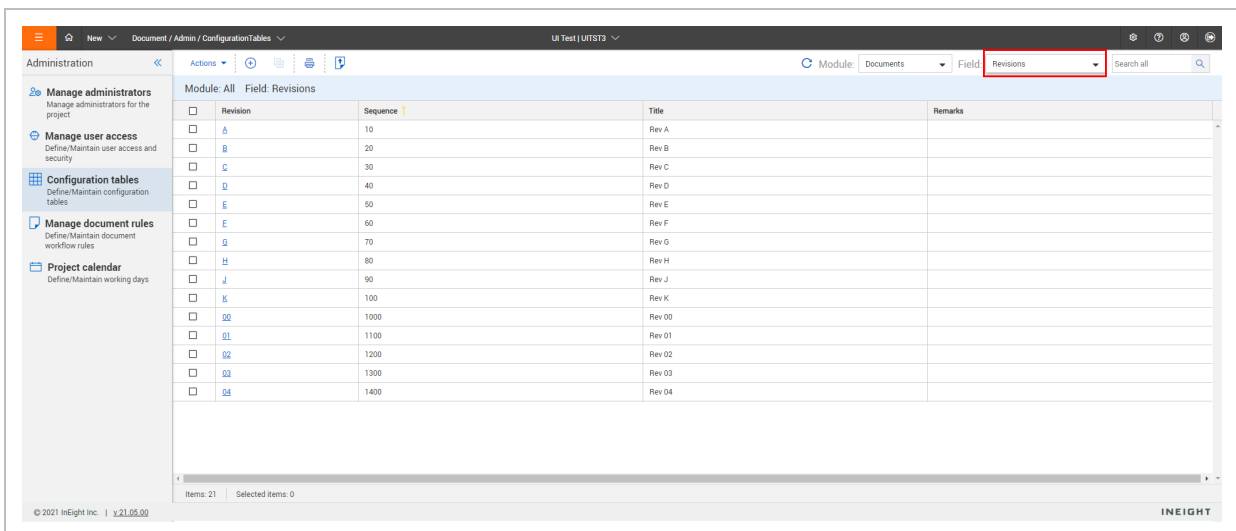
The sequence number is used to validate uploaded documents to ensure that the revision being uploaded is greater than the previously uploaded revision.

4.2.1 To apply configuration settings for revisions:

1. Click the **cogwheel icon** and select **Admin**.

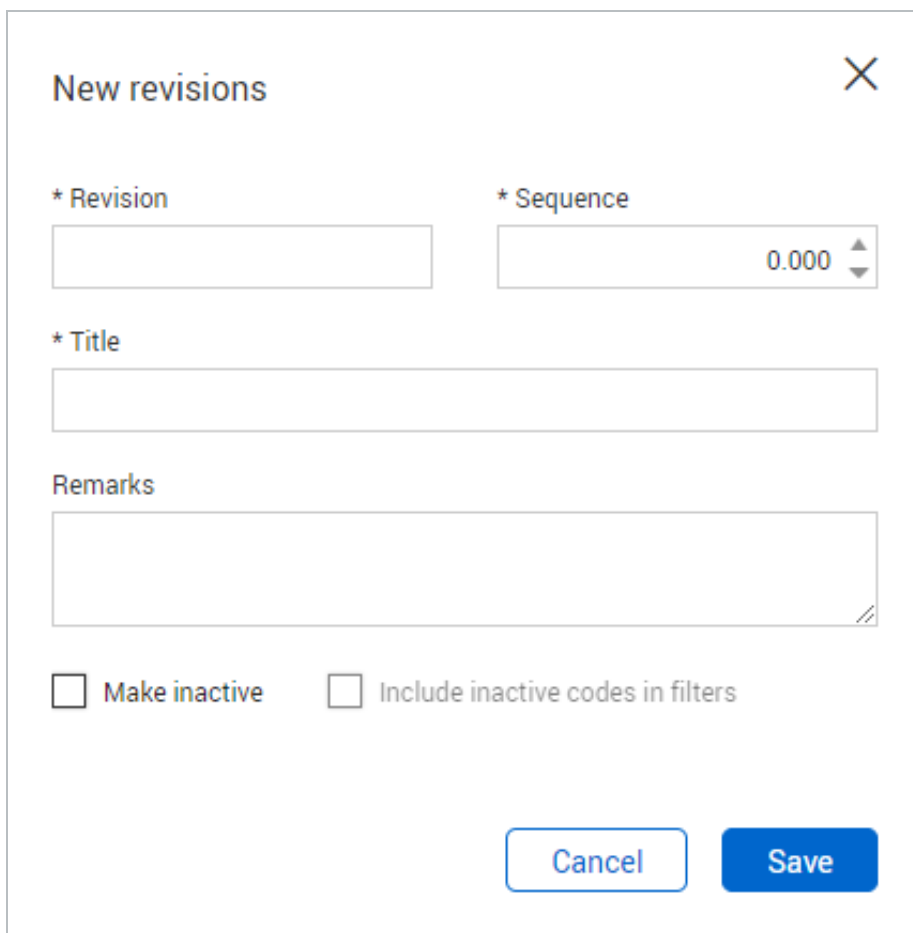


2. Select **Configuration tables** and select **Revisions** from the drop-down menu.



3. Click the **plus icon**.
4. Enter in the details of the new revision:
 - **Revision:** The value of the revision (A, B, C).
 - **Title:** The description of the revision.

- **Sequence:** The order of the revision value.



New revisions ✕

* Revision

* Sequence

* Title

Remarks

Make inactive Include inactive codes in filters

5. Click **Save**.

NOTE

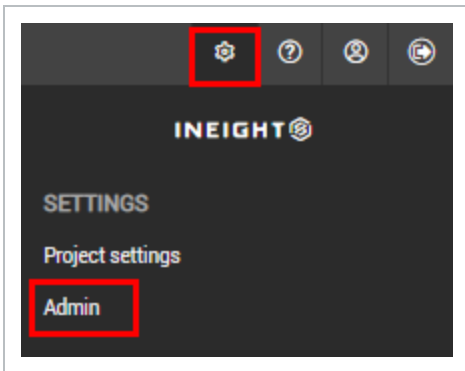
- It is possible to upload additional view files to a document without changing the revision.
- When selecting the sequence field, leave a large gap in the sequences used so additional entries can be added.

4.3 DEFINING MANDATORY FIELDS

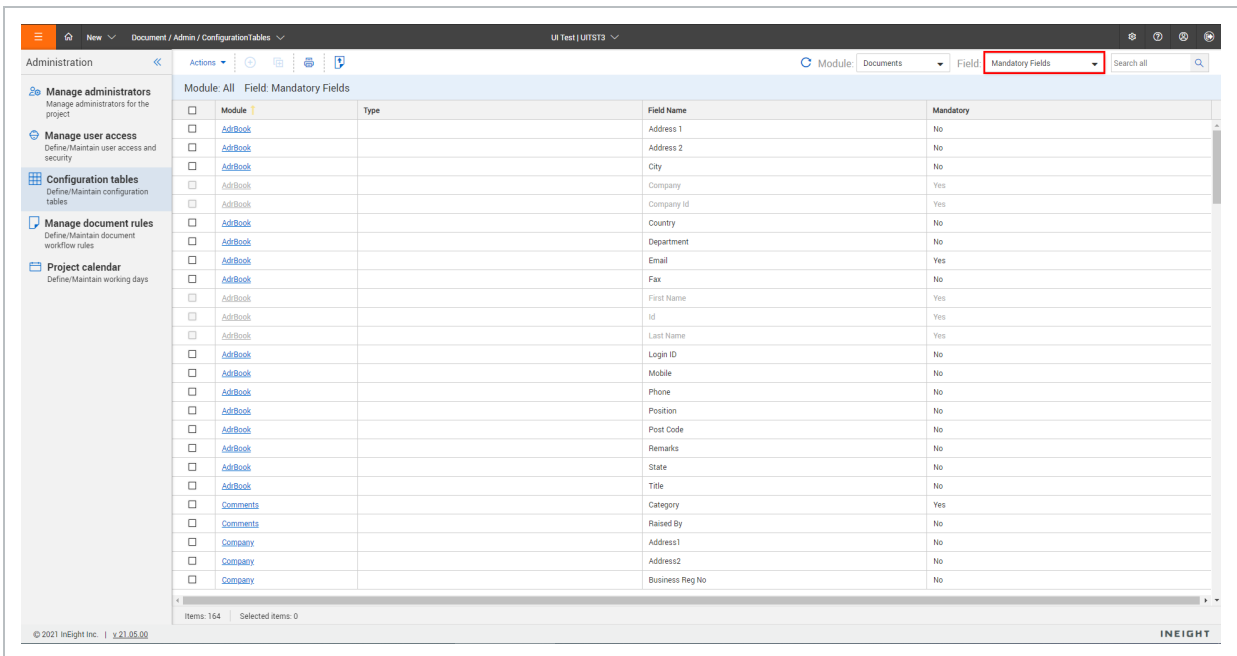
Mail, documents, transmittals and the address book have pre-defined mandatory fields. Additional fields can be made mandatory at these screens if required.

4.3.1 To define mandatory fields:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **Mandatory fields** from the drop-down menu.



3. Select the mandatory field.

4. Edit the mandatory field.

Edit mandatory fields ✕

* Module
Document

* Field Name
Revision Notes

Mandatory

Cancel Save

5. Click **Save**.

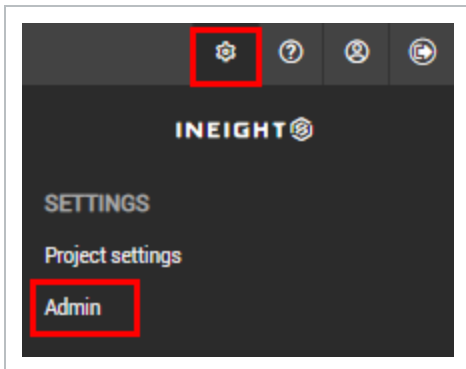
NOTE A field can be defined as mandatory for All types by selecting the *All* value and marking it as mandatory for a specific field. This field is then mandatory on all types. Mandatory fields that cannot be edited are disabled.

4.4 DEFINING REVIEW STATUS CODES

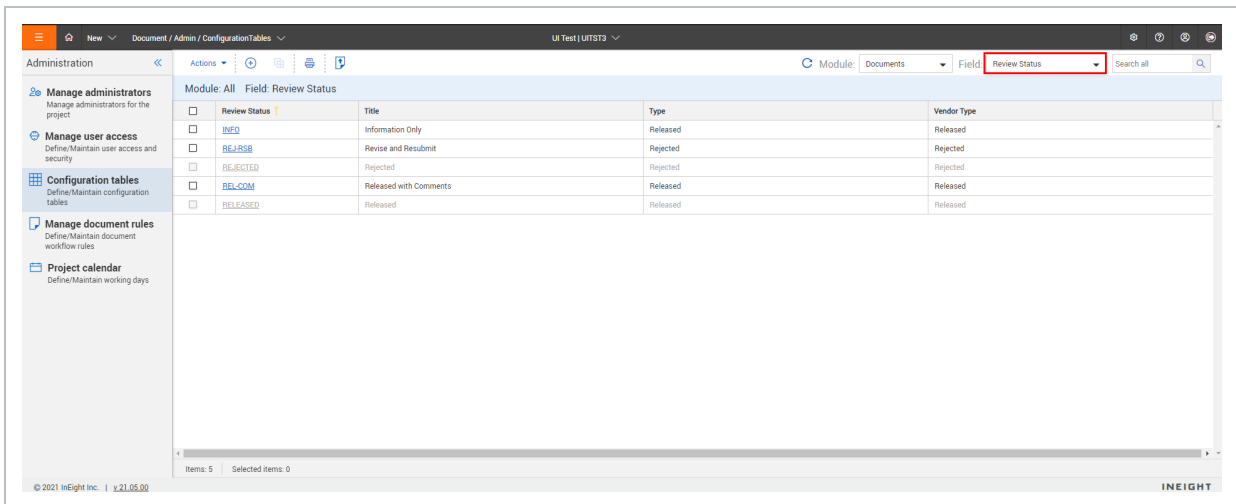
At the end of review a status is assigned that determines if the document is released or rejected.

4.4.1 To define review status codes:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **Review Status** from the drop-down menu.



3. Click the plus icon.
4. Enter in the details of the new status code:
 - **Review Status Code:** The code for the review status.
 - **Type:** Select either released or rejected.

- **Title:** The description of the review status code.

New review status

* Review Status

Type

Released Rejected

Vendor Type

Released Rejected

* Title

Cancel Save

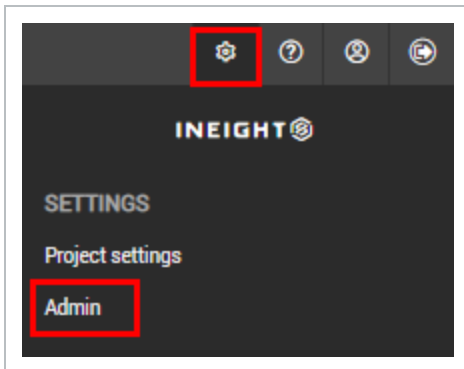
5. Click **Save**.

4.5 CREATING TEXT INPUTS

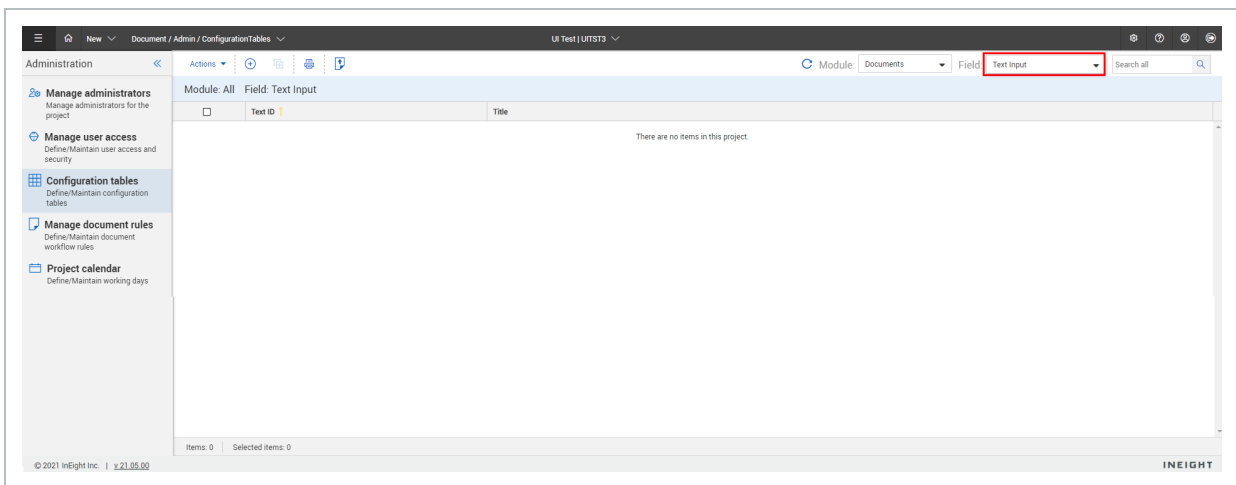
Text inputs are commonly used text that can be made available to users when creating mail or transmittals. Text inputs can be assigned to selected mail and transmittal types and linked to a default subject.

4.5.1 To create text inputs:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **Text Input** from the drop-down menu.



3. Click the **plus icon**.
4. Enter in the details of the new text input:
 - **Text input:** The code of the text input.
 - **Title:** The title of the text input.
 - **Select mail and/or transmittal types:** Select any mail or transmittal types that this text input will be available in.

- **Standard text:** The text for the text input.

The screenshot shows a 'New text input' dialog box. It includes a title bar with a close button (X). The main area contains the following elements:

- * Text input:** A text input field.
- * Title:** A text input field.
- Subject:** A text input field.
- * Select mail and/or transmittal types:** A dropdown menu with the text 'Select some items' and a downward arrow.
- * Standard text:** A rich text editor area with a 'Plain Text' link in the top right corner. The toolbar includes: 'FORMAT' (dropdown), bold (B), italic (I), underline (U), bulleted list, numbered list, and right-align icons.

At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

5. Click **Save**.

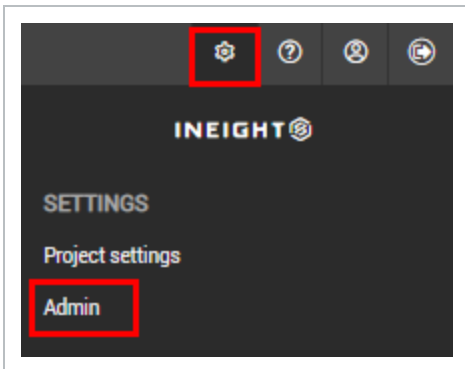
4.6 DEFINING THE DOCUMENT FILE NAME FORMAT

In addition to auto document number, there is the ability to extract document information from the saved file name. This will be active for both single and bulk document uploads.

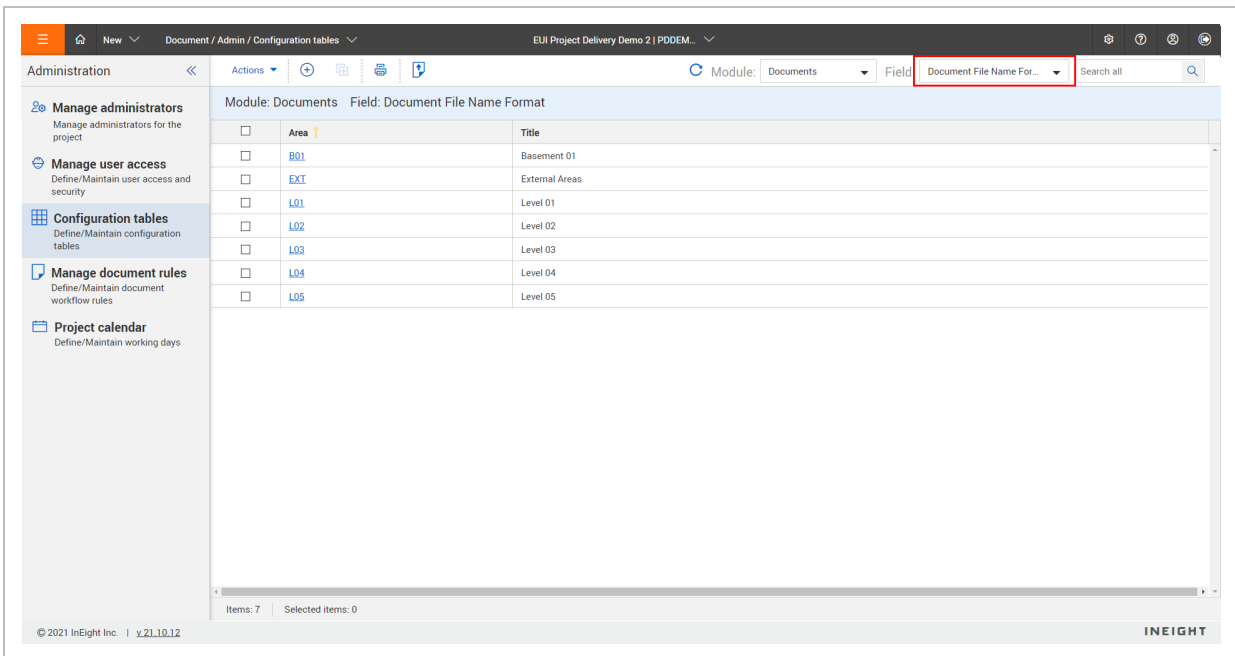
The option to extract document information from a file name needs to be activated in project settings.

4.6.1 To define the document file name format:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **Document File Name Format** from the drop-down menu.



3. Click the **plus icon**.
4. Enter in the details of the new document file format:
 - **File Name Format:** The file name format.
 - **Title:** The title of the file name format.
 - **Value:** The required expression to extract the document information.

New document file name format ✕

*** File Name Format**

*** Title**

*** Value**

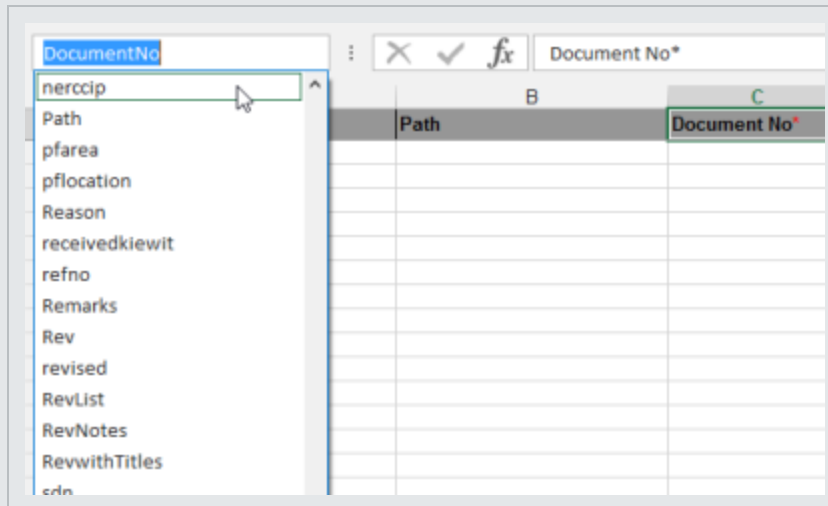
Make inactive Include inactive codes in filters

5. Click **Save**.

NOTE

Fields are extracted using RegEx. Please see examples at <https://www.regex tester.com>

- Field names need to be inserted with the format **(?P<fieldname>.*).**
- Do not use spaces if the 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 **)** make up the document number.
 - The document number does not have the closed brackets at the end to indicate the inclusion of the following fields.
 - Note that the hyphen between the brackets is the separator between attributes.
- To find names of custom fields, use XL Upload as below:
 1. Highlight any field name header.
 2. Select the drop down in the top left corner of the screen.
 3. Locate the field name for document number convention.



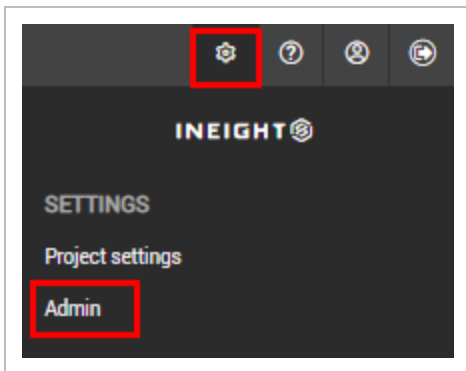
- If any information is already populated, it will not be overwritten when the file is attached.

4.7 DEFINING REASONS FOR TRANSMITTALS

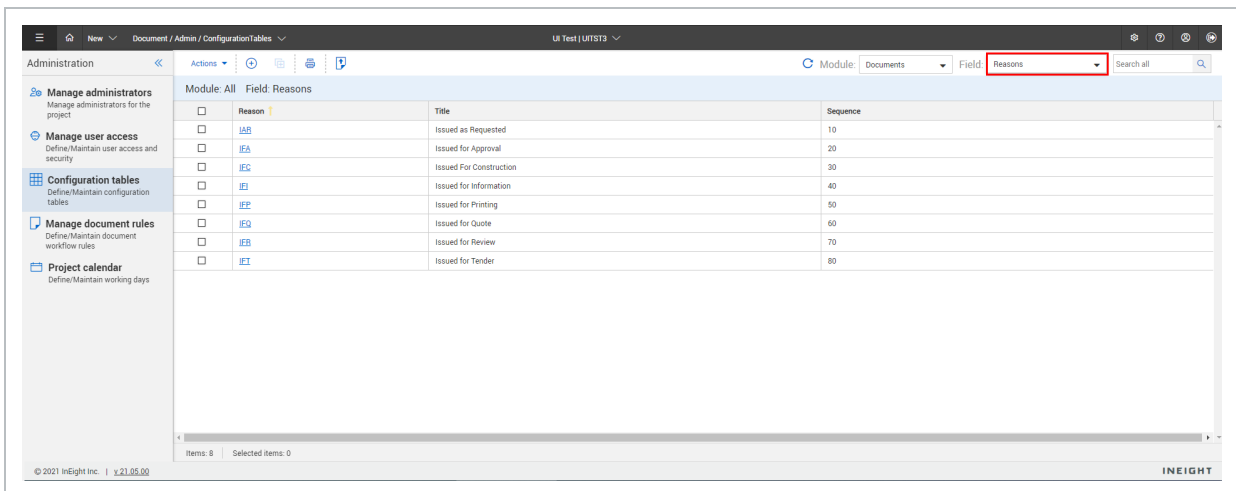
When creating a transmittal, a reason for the issue can be specified.

4.7.1 To create a reason for a transmittal:

1. Click the **cogwheel icon** and select **Admin**.

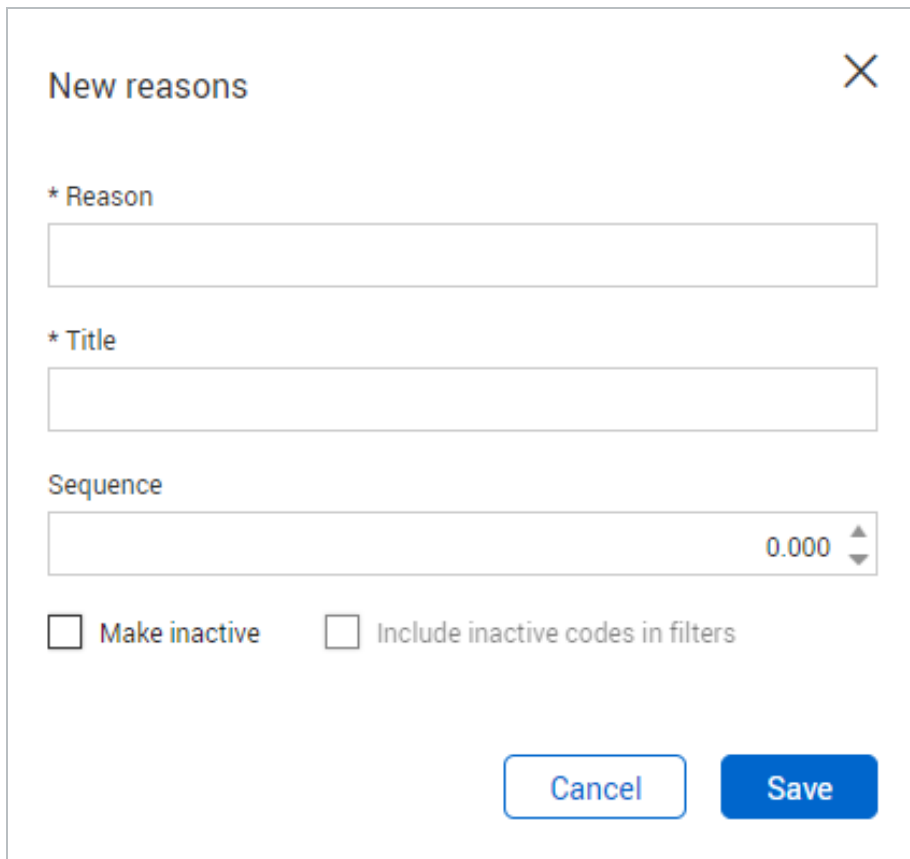


2. Select **Configuration tables** and select **Reasons** from the drop-down menu.



3. Click the **plus icon**.

4. Enter in the details for the new reason.



New reasons ✕

* Reason

* Title

Sequence

Make inactive Include inactive codes in filters

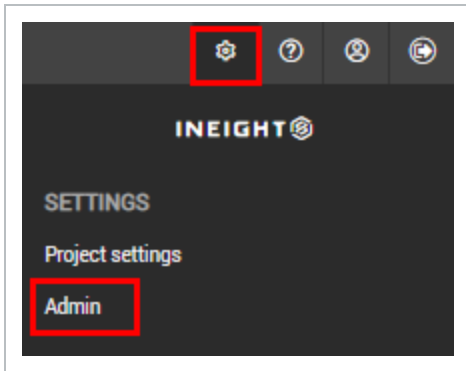
5. Click **Save**.

4.8 DEFINING RESPONSE MESSAGES

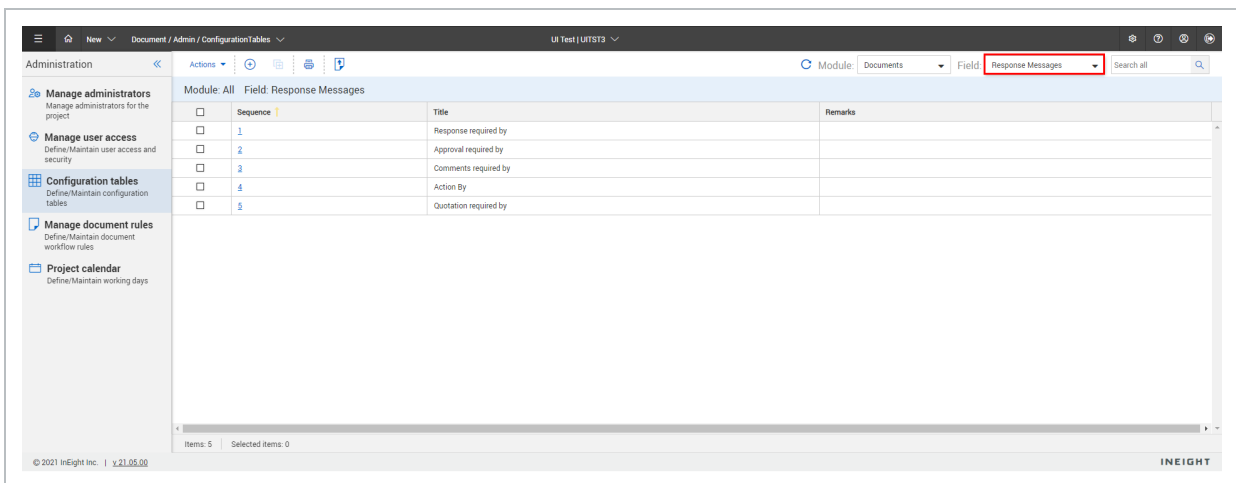
When requesting a response to a transmittal, standard response messages can be specified.

To create a standard response:

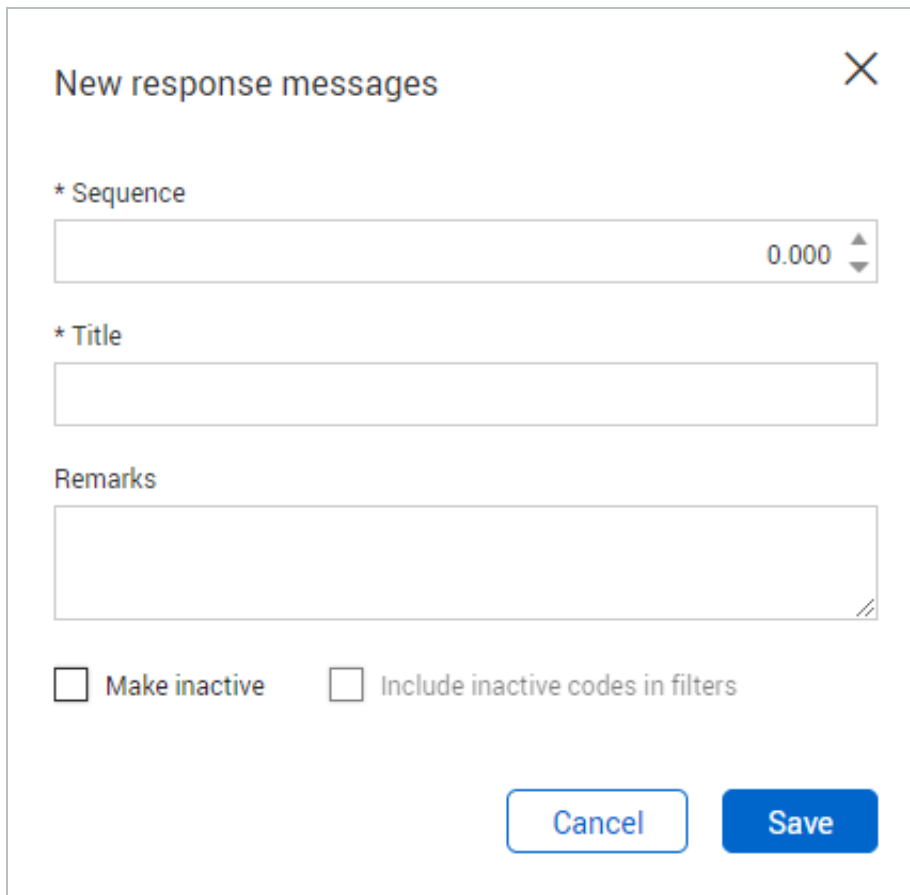
1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **Response Messages** from the drop-down menu.



3. Click the **plus icon**.
4. Enter in the details for the new response message.



New response messages ✕

* Sequence
0.000

* Title

Remarks

Make inactive Include inactive codes in filters

Cancel Save

5. Click **Save**.

4.9 DEFINING FILE FORMATS

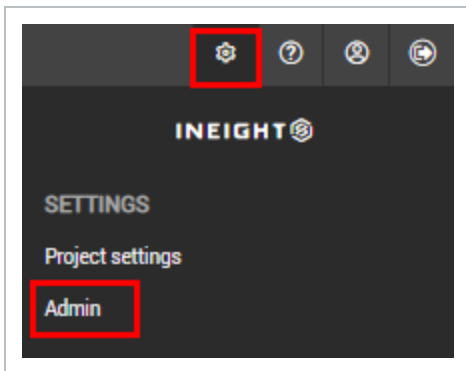
InEight Document supports the storage and distribution of multiple formats for the same controlled document at the same revision and status.

When viewing the document register, four file format columns are displayed (the default settings are PDF, DWG, DOC and OTHER). Each file format column has one or more file types (defined by document file extension) associated with it.

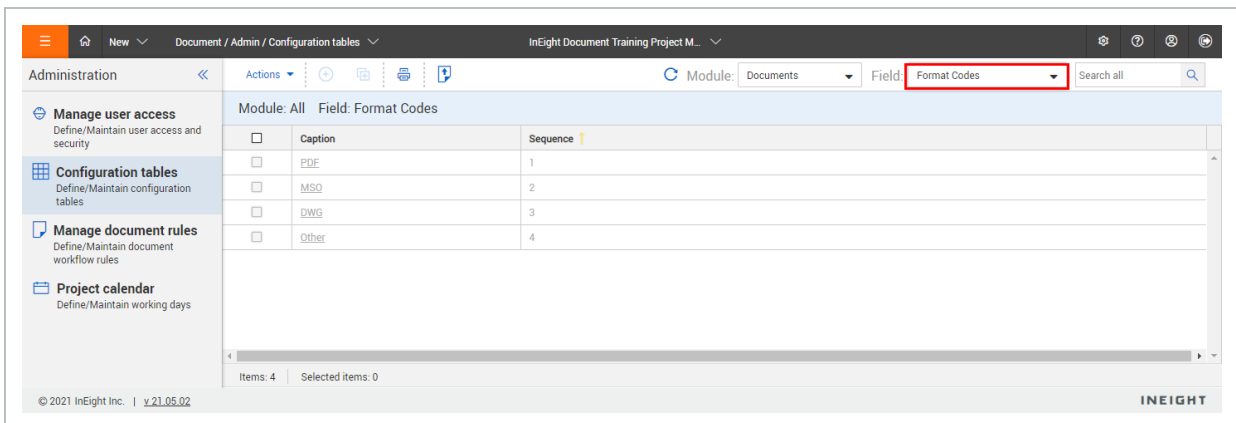
As documents are uploaded to InEight Document, the system auto detects the file type extensions of the included view files. In the Document Register, an icon indicates whether the file format is available to download.

4.9.1 To modify the primary file format settings:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **File Formats** from the drop-down menu.



3. Select the format code you want to edit.
4. Edit the details for the file format:
 - **Caption:** The caption for the file format.
 - **Sequence:** The column order that the file format will appear in.
 - **Format:** The formats that will be sorted to this file format group.

Edit format codes
✕

* Caption

* Sequence

* Format

Document format list:

Format
PDF -

5. Click **Save**.

NOTE

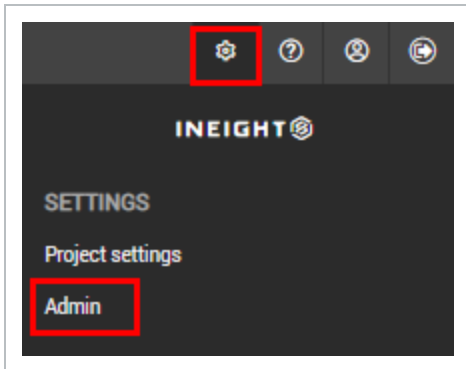
- **This setting can only be edited at the start of a new project and before any documents are uploaded to the system.**
- If a document is uploaded and it does not have a file format that is defined in the format codes, it will be applied to the fixed file format of OTHER.
- The format code OTHER cannot be removed.

4.10 DEFINING QUICK LINKS

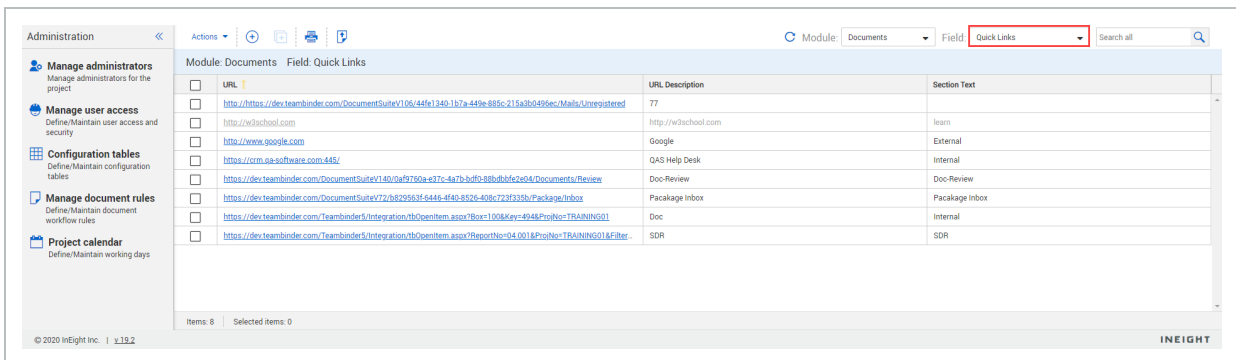
The quick links widget on the Dashboard displays a list of links to external sites and is visible to all users if there is at least one link defined.

4.10.1 To add quick links:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Configuration tables** and select **Quick Links** from the drop-down menu.



3. Click the **plus icon**.
4. Enter in the details for the new quick link.
 - **URL:** The URL for the quick link.
 - **Link Text:** The text that the quick link will display.

New quick links ✕

* URL

* Link Text

Section Text

Make inactive Include inactive codes in filters

5. Click **Save**.

4.11 DEFINE SUBMITTAL MILESTONES

Submittal milestones ensure that deliverables are submitted in a timely manner. Document has defined the following milestones:

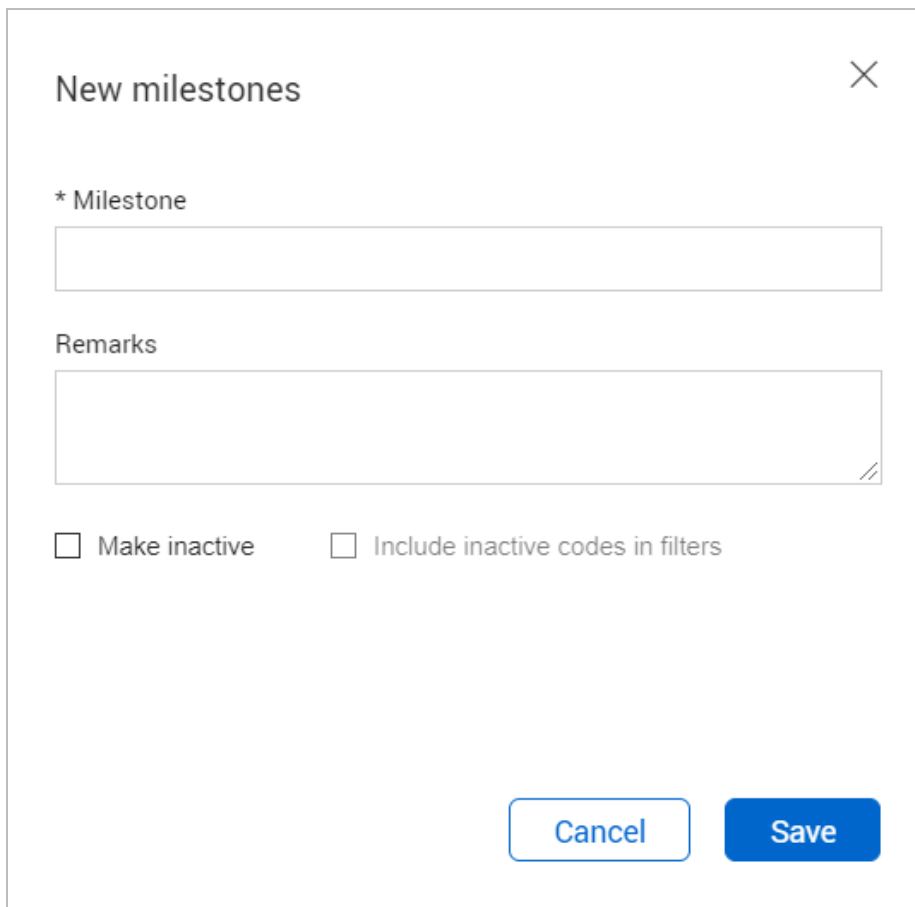
You can configure more project milestones with names that are meaningful to your organization. You can also use these settings to mark a milestone as inactive. When you mark a milestone as inactive you can also specify whether to use the milestone in filters.

4.11.1 To define submittal milestones

The submittal milestones indicate the steps of a submittal that must be completed. The scheduled, forecasted, and actual dates for the milestone are tracked on the Submittal Details page for a project.

You cannot delete a milestone. If a milestone is not used, you can make it inactive. The default milestones that are included with Document cannot be deactivated.

1. Click the **Settings** icon, and then select **Admin**.
2. Select **Configuration tables**.
3. Select **Submittals** as the module and **Milestones** as the field.
4. Click the **Add** icon. The New milestones dialog box opens.



The screenshot shows a dialog box titled "New milestones" with a close button (X) in the top right corner. The dialog contains the following elements:

- A text input field labeled "* Milestone".
- A larger text area labeled "Remarks".
- Two checkboxes: Make inactive and Include inactive codes in filters.
- Two buttons at the bottom: "Cancel" (outlined) and "Save" (solid blue).

5. Enter the milestone name and any remarks about the milestone.
6. If the milestone is inactive now, check the **Make inactive** check box. If you want to include the inactive milestone in filters, check the **Include inactive codes** in filters check box.
7. Click **Save**.

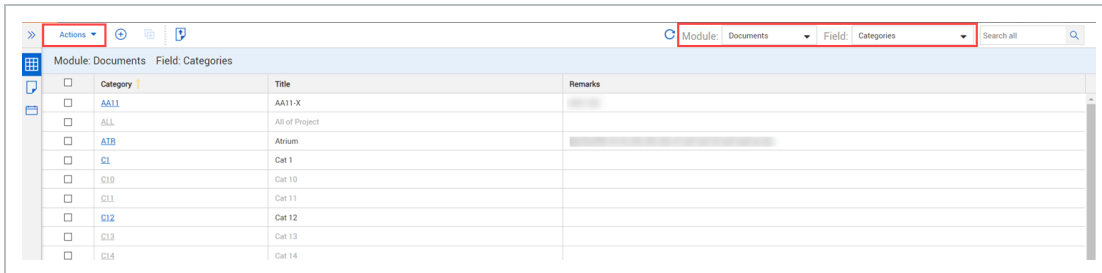
The milestone is shown in the Scheduled dates and Milestones information groups on the Submittal Details page for projects going forward.

You can edit a milestone by clicking the link in the Milestone column of this page.

4.12 VIEW CONFIGURATION HISTORY

You can see a full audit of changes made to the configuration tables.

1. From the Configuration Tables register, select a module and field.



2. Go to the Actions menu, and then select **History**. A history window opens.

The History page shows the following:

Field	Description
Date	The date the change was made to the setting.
Value	The setting that was changed.
Event type	The type of change made.
Action by	The person that made the change.
Description	The change that was made. Click the ellipsis to see the original value and the new value.

This page intentionally left blank.

CHAPTER 5 – APPLYING ADDITIONAL ADMINISTRATIVE FUNCTIONS

For information on Applying Additional Administrative Functions, see the links below.

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5.2 Managing Folders	159
5.2.1 To create a standard folder:	160
5.2.2 To create a smart folder:	161
5.2.3 To create a dynamic folder:	164
5.3 Accessing Project Archives	166

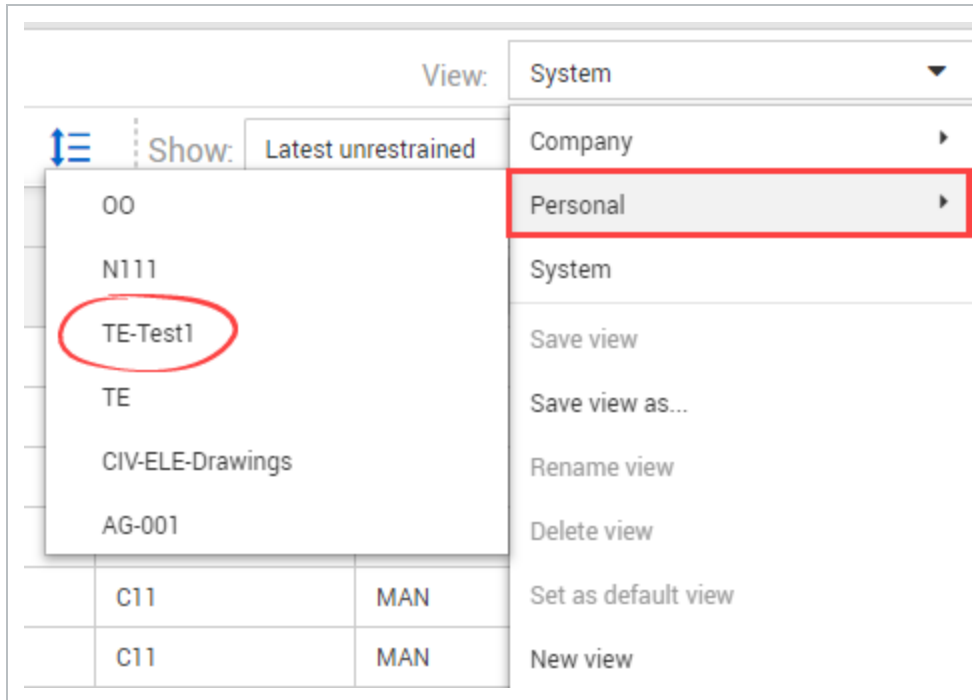
5.1 MANAGING REGISTER VIEWS

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 views for each main Register.

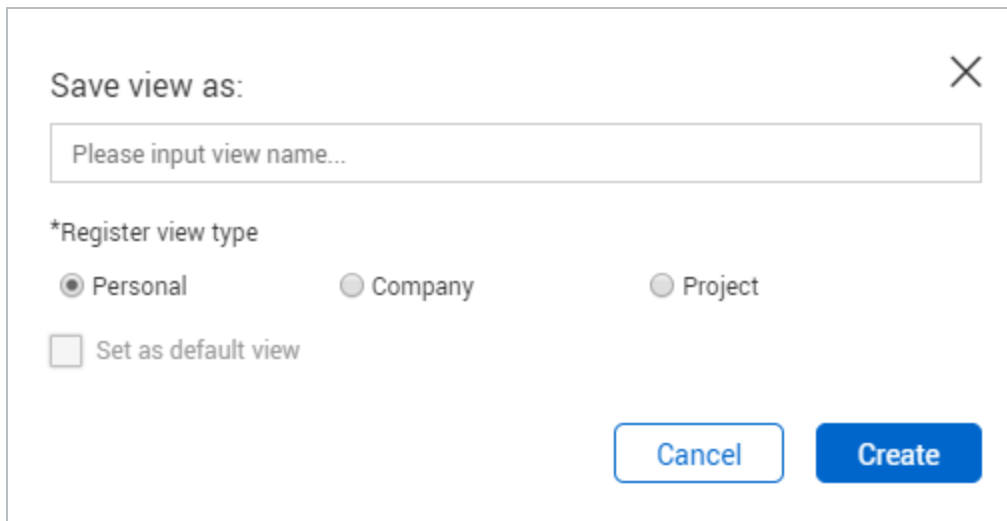
When saving the Register View, the Search criteria will also be saved. This means that when utilizing the register views, you will be shown the results along with the relevant metadata depending on the view selected.

5.1.1 To define a company or project level custom view:

1. Click the **Views** drop down menu.
2. In the **Company** or **Personal** tab, select the view.



3. Click the **Views** drop-down menu and select **Save view as....**
4. Enter in the name of the view.
5. Select whether the view is:
 - **Personal.**
 - **Company.**
 - **Project.**



Save view as: ✕

Please input view name...

*Register view type

Personal Company Project

Set as default view

Cancel Create

6. Click Create.

NOTE

- When users access a Register, their preferred personal view will be loaded. If they do not have their own personal view defined, the company view will be loaded. If both are not defined, the Project view will be loaded. If no custom Registers are defined, a system default view will be displayed.
- The ability to define project and personal custom Register views is enabled by default and managed via the project settings. If enabled at a project level, the option to allow a user personal view can be managed at a company level by using the Options tab within company details.

5.2 MANAGING FOLDERS

In addition to standard folders, InEight Document enables projects and/or companies within a project to define a multi-level filing system with folders to further enhance the way items are indexed.

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.

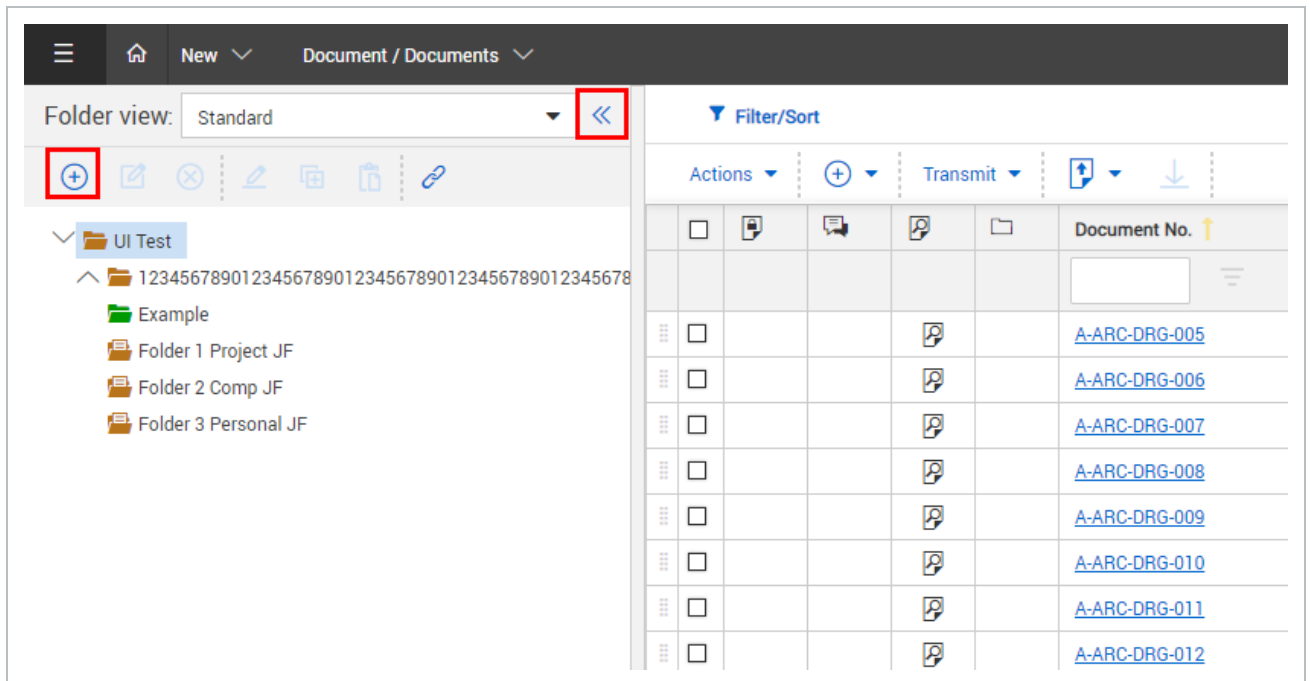
You can create folders from your desired Register. These folders can either be standard, smart or dynamic folders.

- **Standard folders** can be created to manually file mail, documents and other InEight data.
- **Smart folders** automatically file mail, documents and other InEight data into folders based upon set filter criteria.

- **Dynamic folders** can automate the process of creating folders and filing data into folders based on criteria. For example, if a document is uploaded to a discipline where no folder exists for that discipline, the folder will be created and the document filed automatically.

5.2.1 To create a standard folder:

1. Expand the folder pane and click the **plus icon**.



2. Enter in the details of the folder.

Add folder to Training01 Project for TeamBinder

*Folder ID

*Title

*Type

*Security Private Public

Smart folder (automatically allocate items based on filter criteria)

3. Click **Save**.

5.2.2 To create a smart folder:

1. Expand the folder pane and click the **plus icon**.

Folder view: Standard

Filter/Sort

Actions + Transmit


				Document No. ↑
				<input type="text"/>
...	<input type="checkbox"/>			A-ARC-DRG-005
...	<input type="checkbox"/>			A-ARC-DRG-006
...	<input type="checkbox"/>			A-ARC-DRG-007
...	<input type="checkbox"/>			A-ARC-DRG-008
...	<input type="checkbox"/>			A-ARC-DRG-009
...	<input type="checkbox"/>			A-ARC-DRG-010
...	<input type="checkbox"/>			A-ARC-DRG-011
...	<input type="checkbox"/>			A-ARC-DRG-012

2. Enter in the details of the folder.

3. Select the **Smart folder** check box.

Add folder to Training01 Project for TeamBinder ✕

*Folder ID	*Title
<input type="text"/>	<input type="text"/>
*Type	*Security
<input type="text" value="Select one"/>	<input checked="" type="radio"/> Private <input type="radio"/> Public

 Smart folder (automatically allocate items based on filter criteria)

4. Enter in the filter criteria for the folder.

Add folder to Training01 Project for TeamBinder ✕

*Folder ID

*Title

*Type

*Security Private Public

Smart folder (automatically allocate items based on filter criteria)

Search criteria for:

All mail New mail Outstanding mail

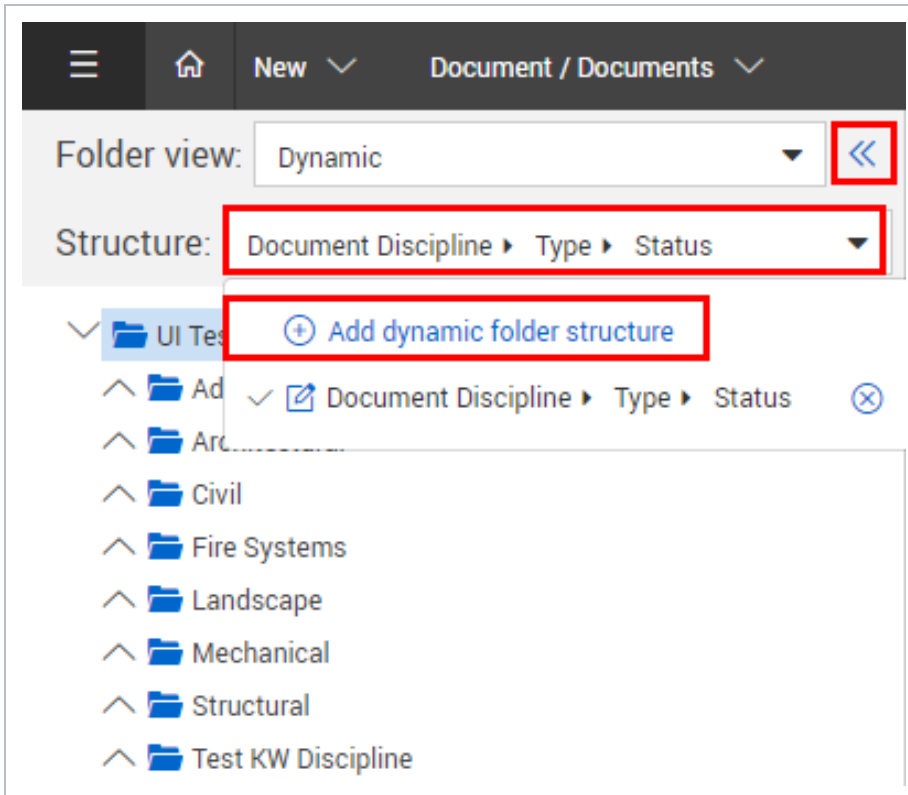
To: From:

Filter by:	Column	Operator	Value
<input type="button" value="+"/>	Area	Equals	Select some items...
<input type="button" value="+"/> AND	Cancelled	Equals	Select some items...

5. Click **Save**.

5.2.3 To create a dynamic folder:

1. Expand the folder pane.
2. Click the **Structure** drop-down menu and select **Add dynamic folder structure**.



3. Select the top level field of your dynamic folder structure and click the **arrow icon**.

The screenshot shows the 'Add dynamic folder' dialog box. It features two 'Available fields' lists. The left list contains the following items: Document Discipline (highlighted with a red box), Document Sender Company, From Company ID, Review Status, Status, and Type. A red box also highlights a right-pointing arrow icon between the two lists. The right list is currently empty. Below the lists, there are radio buttons for 'None', 'My company', and 'My project', with 'None' selected. There is also a checkbox for 'Set as Default Dynamic Folder view'. At the bottom right, there are 'Cancel' and 'Save' buttons.

4. Select the next field required and click the **arrow icon**. Reorder the structure by clicking the **arrows icons** on the right.
5. Select whether the dynamic folder view is available to:
 - None
 - My company.
 - My Project.
6. Click **Save**.

NOTE

- Use of folders is restricted to users only belonging to the company that created them. Access limits still exist. For example, a user with only personal mail access can only see personal mail filed.
- To copy a complete branch of the folder tree structure, right click and select **Copy** on the top folder. 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 folder in the new branch.
- Rename and delete folders using the right click options.
- There is no limit to the number of levels in the folder and section tree structure.
- Custom fields can be added to the folder structure in addition to the ID and Title. Contact InEight for more information on this.

5.3 ACCESSING 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, created by InEight and charges applied. 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.

CHAPTER 5 – APPLYING ADDITIONAL ADMINISTRATIVE FUNCTIONS

For information on Applying Additional Administrative Functions, see the links below.

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5.1 MANAGING FOLDERS

In addition to standard folders, InEight Document enables projects and/or companies within a project to define a multi-level filing system with folders to further enhance the way items are indexed.

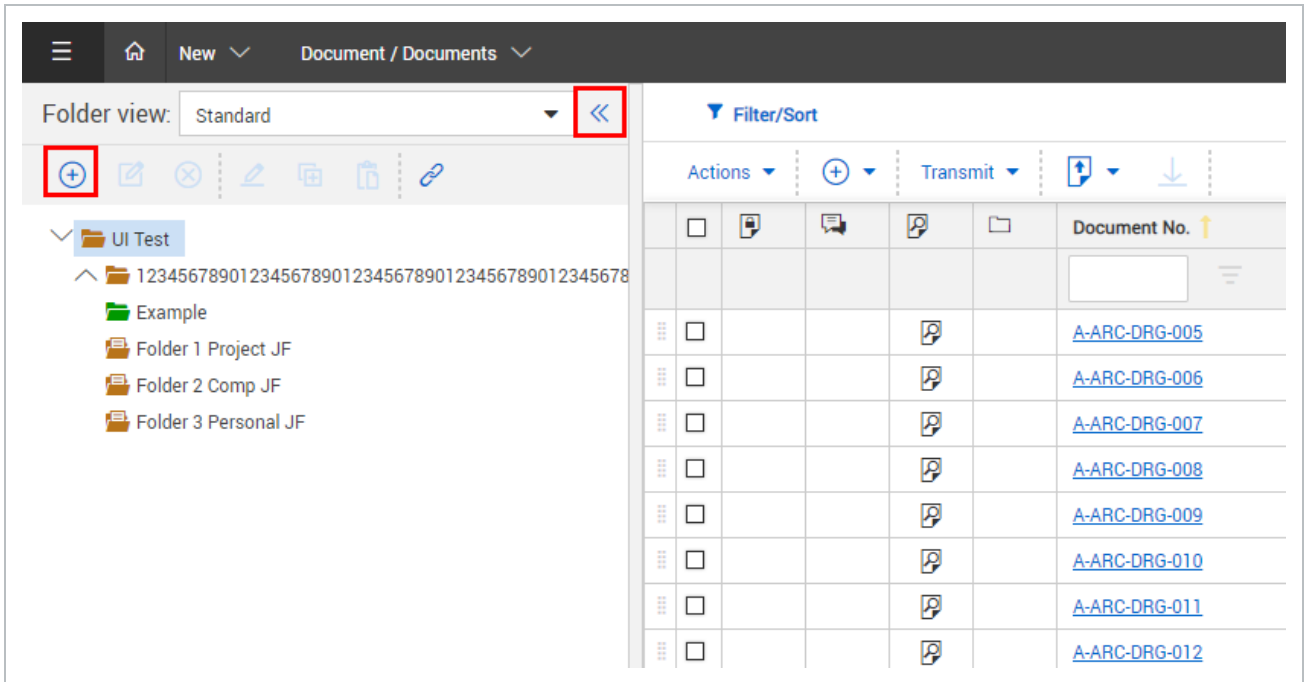
Use of folders in InEight Document enables a centralized filing system to be created for use by all parties on a project (public folders), or for use only by a single company on a project (private folders). The use of folders on a project does not in any way compromise a person's security level.

You can create folders from your desired Register. These folders can either be standard, smart or dynamic folders.

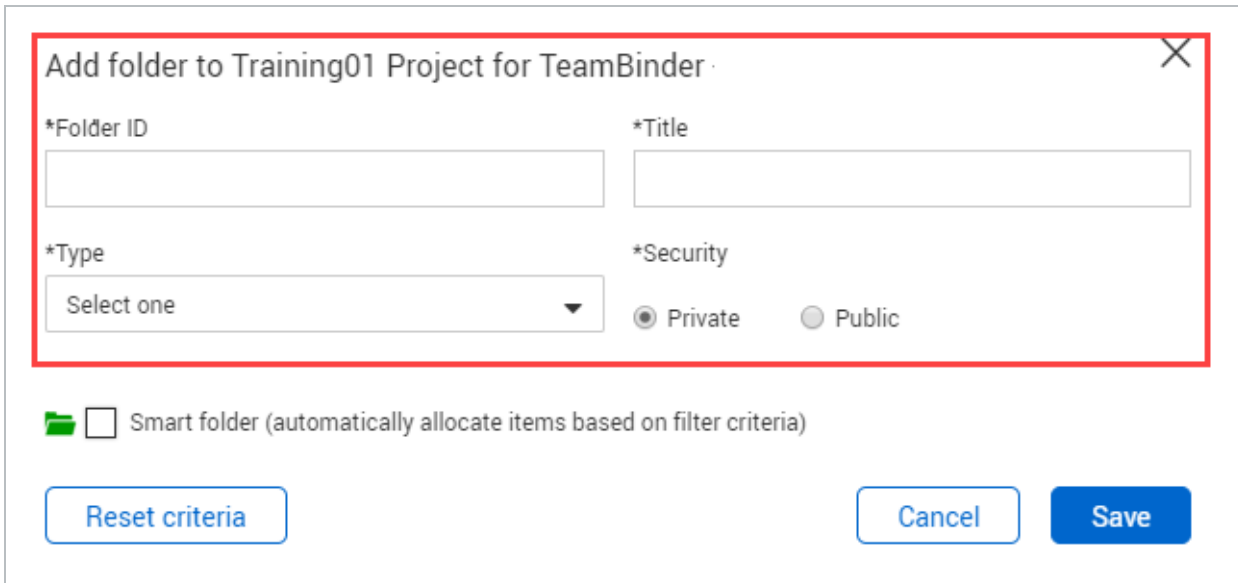
- **Standard folders** can be created to manually file mail, documents and other InEight data.
- **Smart folders** automatically file mail, documents and other InEight data into folders based upon set filter criteria.
- **Dynamic folders** can automate the process of creating folders and filing data into folders based on criteria. For example, if a document is uploaded to a discipline where no folder exists for that discipline, the folder will be created and the document filed automatically.

5.1.1 To create a standard folder:

1. Expand the folder pane and click the **plus icon**.



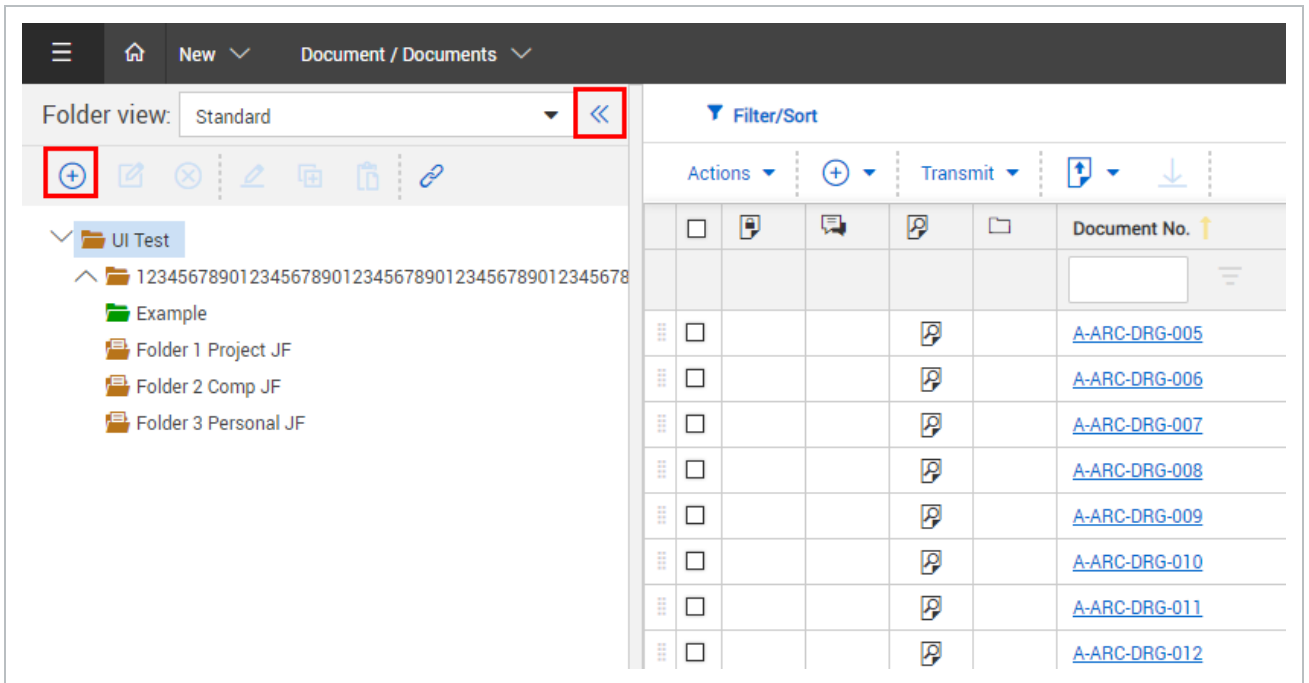
2. Enter in the details of the folder.



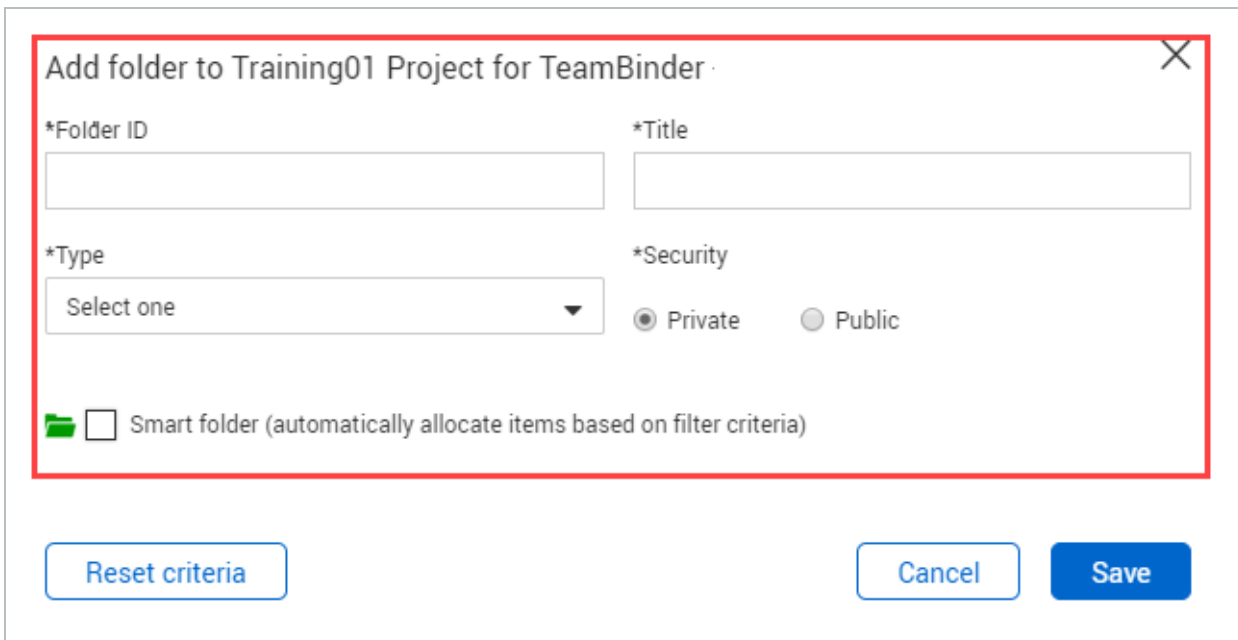
3. Click **Save**.

5.1.2 To create a smart folder:

1. Expand the folder pane and click the **plus icon**.



2. Enter in the details of the folder.
3. Select the **Smart folder** check box.



4. Enter in the filter criteria for the folder.

Add folder to Training01 Project for TeamBinder ✕

*Folder ID *Title

*Type *Security Private Public

Smart folder (automatically allocate items based on filter criteria)

Search criteria for:

All mail New mail Outstanding mail

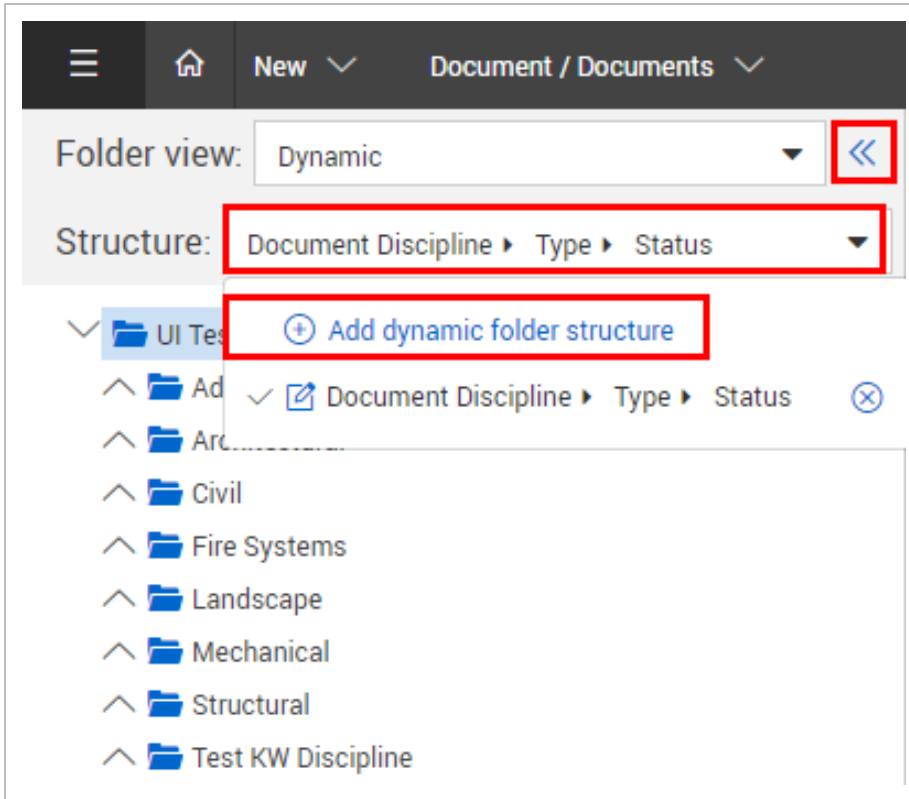
To: From:

Filter by:	Column	Operator	Value
<input type="button" value="+"/>	Area	Equals	Select some items... <input type="button" value="✕"/>
<input type="button" value="+"/> AND	Cancelled	Equals	Select some items... <input type="button" value="✕"/>

5. Click **Save**.

5.1.3 To create a dynamic folder:

1. Expand the folder pane.
2. Click the **Structure** drop-down menu and select **Add dynamic folder structure**.



3. Select the top level field of your dynamic folder structure and click the **arrow icon**.

The screenshot shows the 'Add dynamic folder' dialog box. It features two 'Available fields' lists. The left list contains the following items: 'Document Discipline' (highlighted with a red box), 'Document Sender Company', 'From Company ID', 'Review Status', 'Status', and 'Type'. A red box highlights a right-pointing arrow icon between the two lists. The right list is currently empty, with up and down arrow icons to its right. Below the lists, there are three radio buttons under the heading 'Make this Dynamic Folder View available to': 'None' (selected), 'My company', and 'My project'. A checkbox labeled 'Set as Default Dynamic Folder view' is located below the radio buttons. At the bottom right, there are 'Cancel' and 'Save' buttons.

4. Select the next field required and click the **arrow icon**. Reorder the structure by clicking the **arrows icons** on the right.
5. Select whether the dynamic folder view is available to:
 - None
 - My company.
 - My Project.
6. Click **Save**.

NOTE

- Use of folders is restricted to users only belonging to the company that created them. Access limits still exist. For example, a user with only personal mail access can only see personal mail filed.
- To copy a complete branch of the folder tree structure, right click and select **Copy** on the top folder. 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 folder in the new branch.
- Rename and delete folders using the right click options.
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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, created by InEight and charges applied. For projects being self-hosted by a customer, project archives must be requested and created by the self-hosting company.

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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.

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5.3 MANAGING FOLDERS

For information on Applying Additional Administrative Functions, see the links below.

In addition to standard folders, InEight Document enables projects and/or companies within a project to define a multi-level filing system with folders to further enhance the way items are indexed.

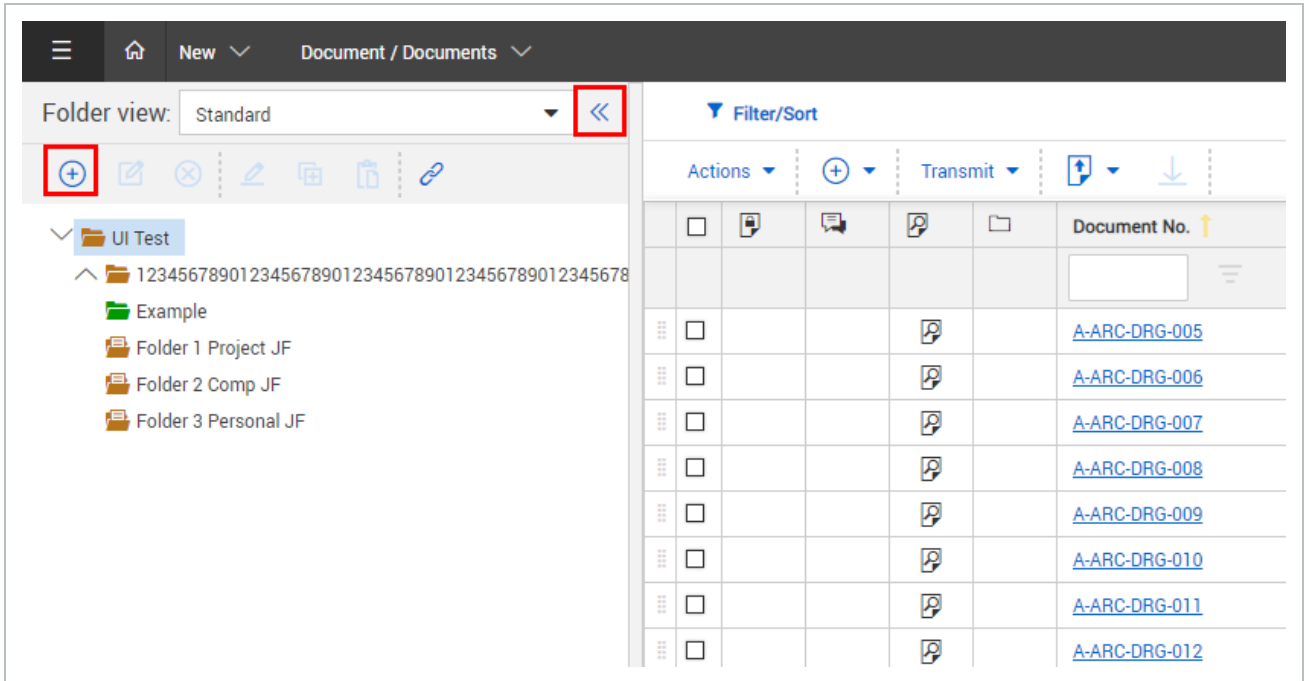
Use of folders in InEight Document enables a centralized filing system to be created for use by all parties on a project (public folders), or for use only by a single company on a project (private folders). The use of folders on a project does not in any way compromise a person's security level.

You can create folders from your desired Register. These folders can either be standard, smart or dynamic folders.

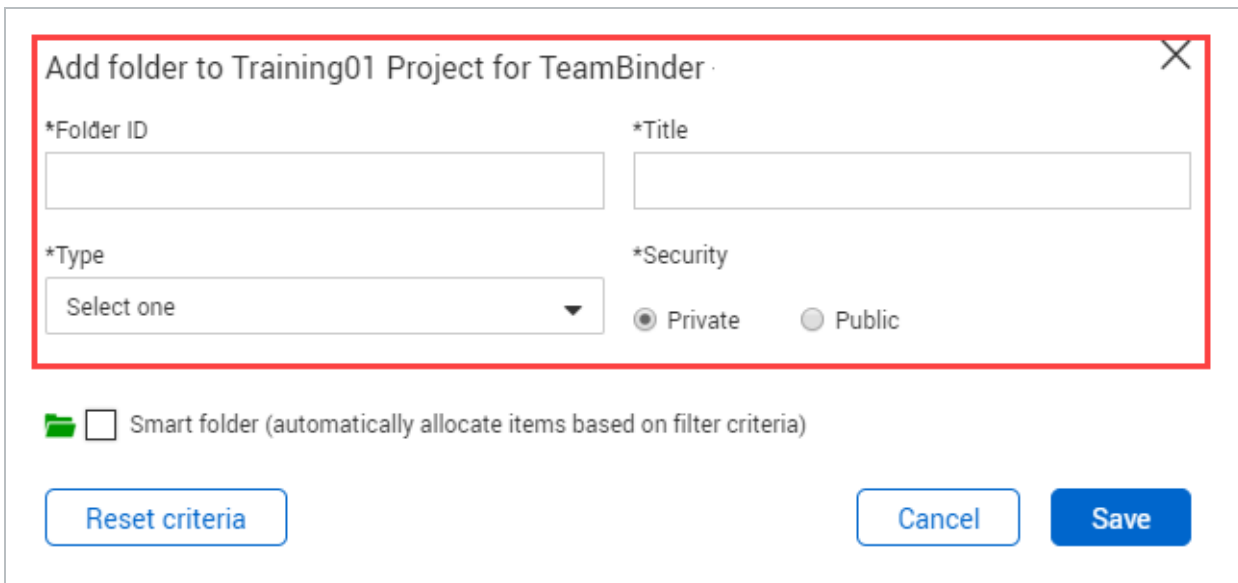
- **Standard folders** can be created to manually file mail, documents and other InEight data.
- **Smart folders** automatically file mail, documents and other InEight data into folders based upon set filter criteria.
- **Dynamic folders** can automate the process of creating folders and filing data into folders based on criteria. For example, if a document is uploaded to a discipline where no folder exists for that discipline, the folder will be created and the document filed automatically.

5.3.0.1 To create a standard folder:

1. Expand the folder pane and click the **plus icon**.



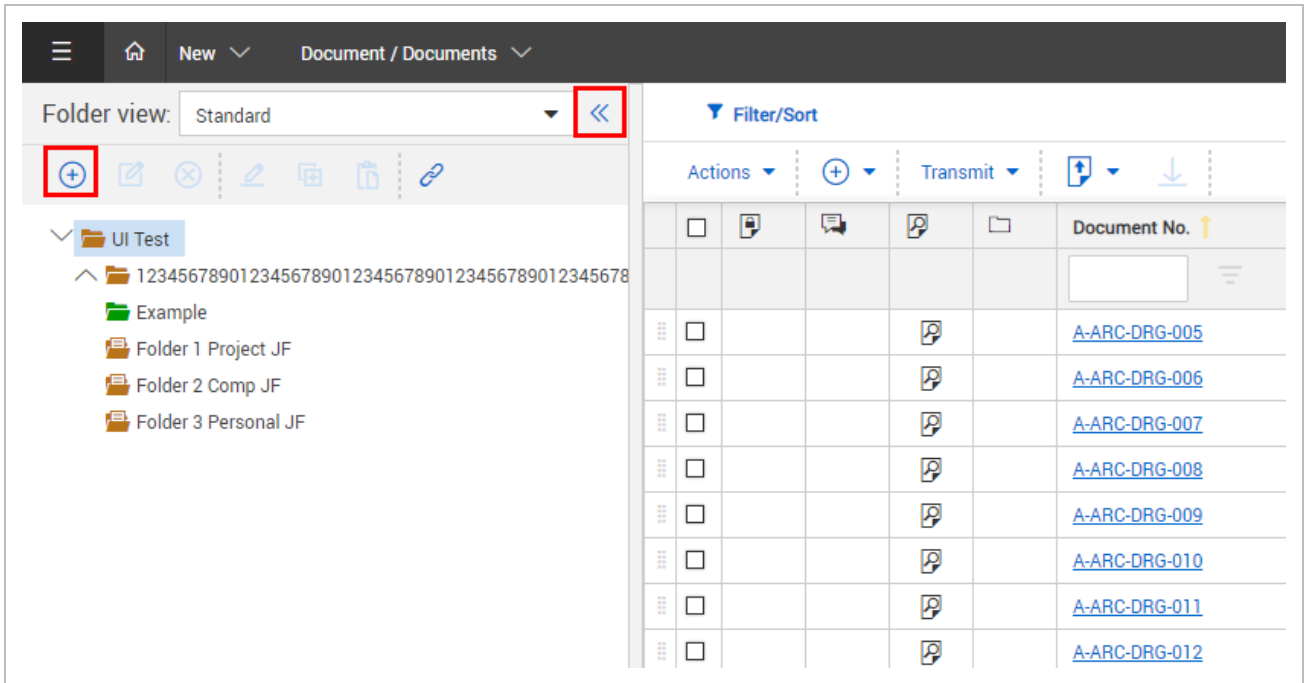
2. Enter in the details of the folder.



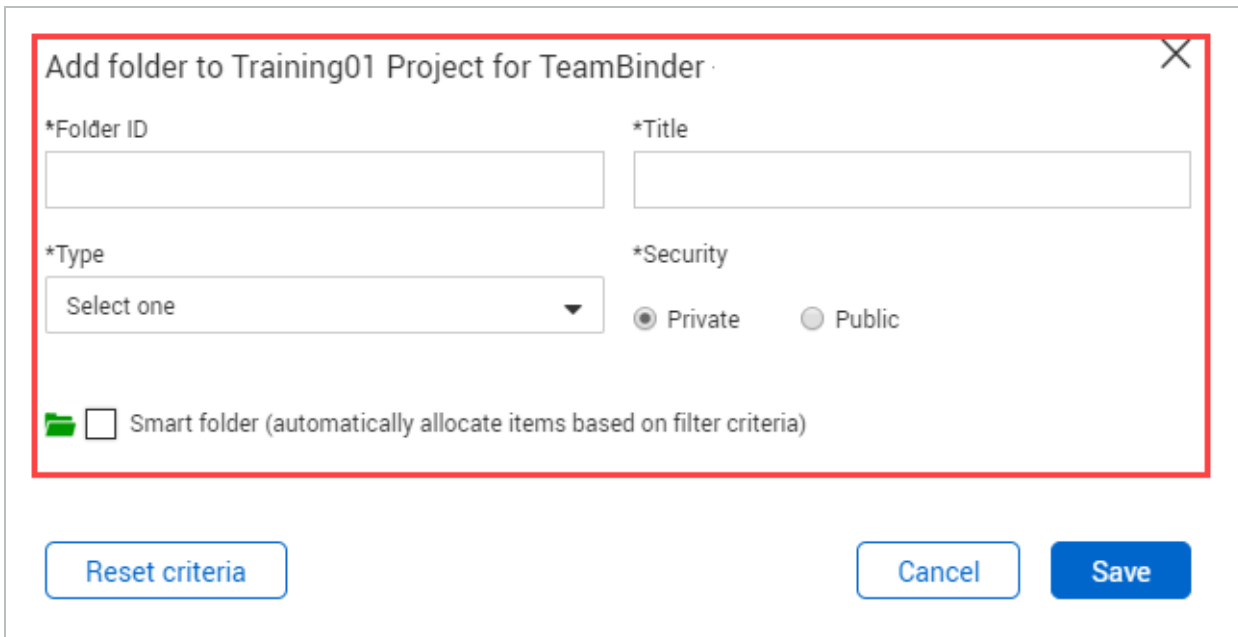
3. Click **Save**.

5.3.0.2 To create a smart folder:

1. Expand the folder pane and click the **plus icon**.



2. Enter in the details of the folder.
3. Select the **Smart folder** check box.



- 4. Enter in the filter criteria for the folder.

Add folder to Training01 Project for TeamBinder ✕

*Folder ID

*Title

*Type

*Security Private Public

Smart folder (automatically allocate items based on filter criteria)

Search criteria for:

All mail New mail Outstanding mail

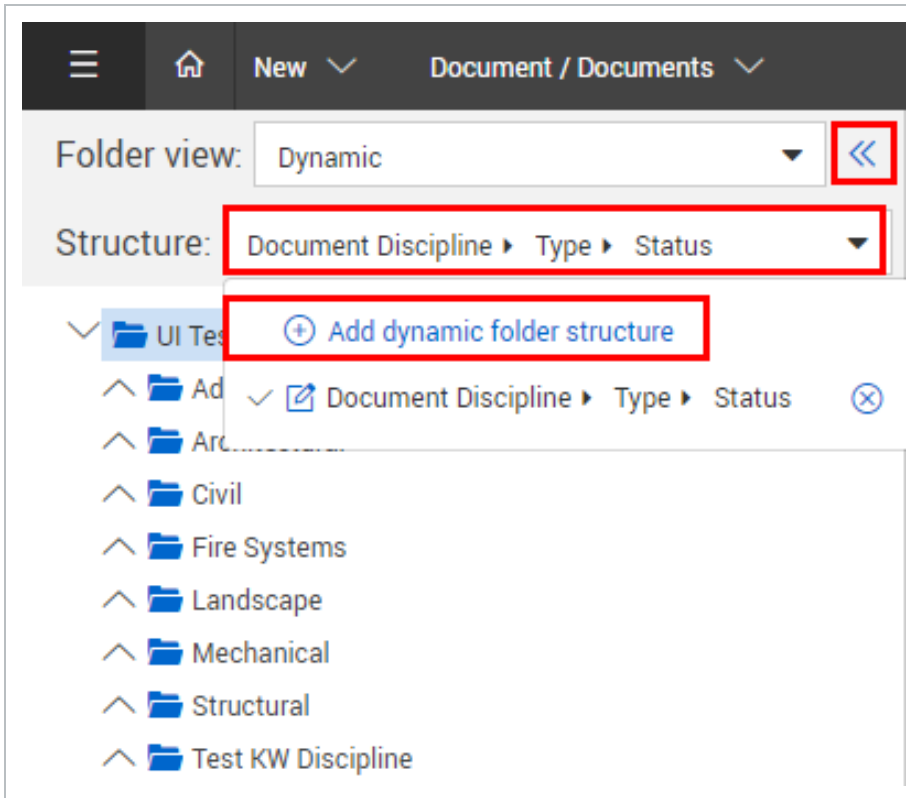
To: From:

Filter by:	Column	Operator	Value
<input type="button" value="+"/>	Area	Equals	Select some items...
<input type="button" value="+"/> AND	Cancelled	Equals	Select some items...

- 5. Click **Save**.

5.3.0.3 To create a dynamic folder:

1. Expand the folder pane.
2. Click the **Structure** drop-down menu and select **Add dynamic folder structure**.



3. Select the top level field of your dynamic folder structure and click the **arrow icon**.

The screenshot shows the 'Add dynamic folder' dialog box. It features two 'Available fields' lists. The left list contains the following items: Document Discipline (highlighted with a red box), Document Sender Company, From Company ID, Review Status, Status, and Type. A red box also highlights a blue right-pointing arrow icon between the two lists. The right list is currently empty. Below the lists, there are radio buttons for 'None', 'My company', and 'My project', with 'None' selected. There is also a checkbox for 'Set as Default Dynamic Folder view'. At the bottom right, there are 'Cancel' and 'Save' buttons.

4. Select the next field required and click the **arrow icon**. Reorder the structure by clicking the **arrows icons** on the right.
5. Select whether the dynamic folder view is available to:
 - None
 - My company.
 - My Project.
6. Click **Save**.

NOTE

- Use of folders is restricted to users only belonging to the company that created them. Access limits still exist. For example, a user with only personal mail access can only see personal mail filed.
- To copy a complete branch of the folder tree structure, right click and select **Copy** on the top folder. 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 folder in the new branch.
- Rename and delete folders using the right click options.
- There is no limit to the number of levels in the folder and section tree structure.
- Custom fields can be added to the folder structure in addition to the ID and Title. Contact InEight for more information on this.

CHAPTER 6 – WORKFLOW ADMINISTRATION RULES

For information on Workflow Administration Rules, see the links below.

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6.1 WORKFLOW ADMINISTRATION RULES

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.

If required, reviewers can create sub-review workflows initiating a workflow within 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 must be configured by InEight and charges may apply.

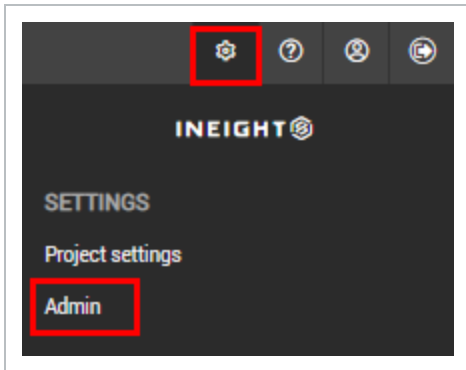
6.2 REVIEW (Y/N) RULES

The review (Y/N) is triggered from the status assigned to the document. This determines if there is a requirement for a document to be reviewed. A document that requires review is defined as restrained

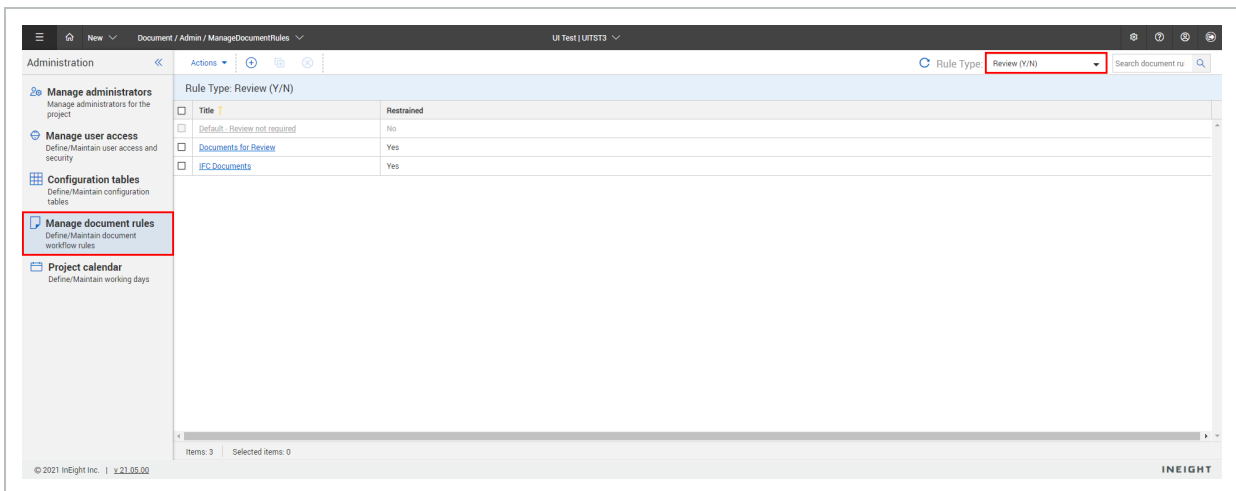
and needs to be passed through a review workflow before it is released.

6.2.1 To define review (Y/N) rules:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Manage document rules**.
3. In the **Rule type** drop-down menu, select **Review (Y/N)**.



4. Click the **plus icon**.
5. Enter in a title and select a status value.

6. Select whether a review is required.

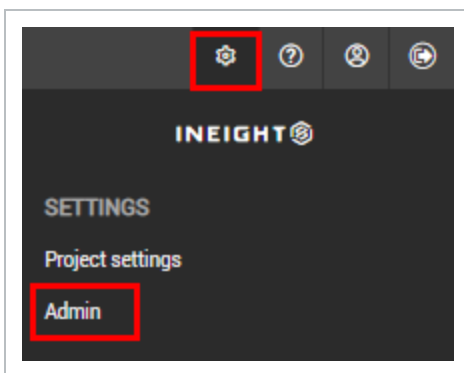
7. Click **Save**.

6.3 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.

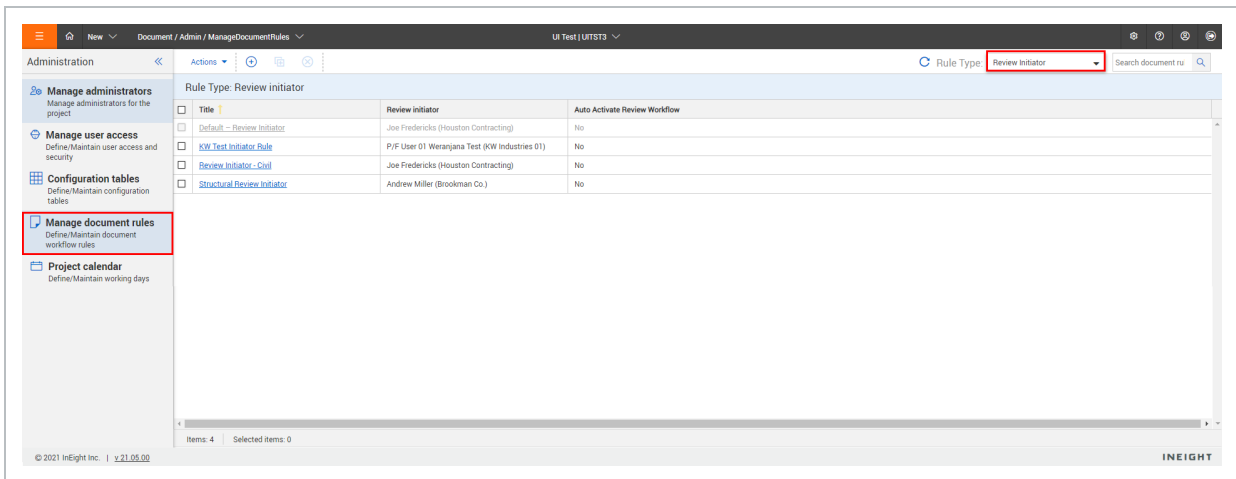
6.3.1 To define review initiators:

1. Click the **cogwheel icon** and select **Admin**.



2. Select **Manage document rules**.

3. In the **Rule type** drop-down menu, select **Review Initiator**.



4. Click the **plus** icon.

5. Enter in a title and select a status value.

6. Select the review initiator's (user or role) company and contact.

Review initiator - New Rule

Cancel Duplicate Save

*Title:

Document Field: Value:

*Review initiator: User Role

*Review initiator company: *Review initiator contact:

Automatically activate review workflow:

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7. Select whether to automatically activate the review workflow.

8. Click **Save**.

NOTE

- If you select to automatically review the workflow, the reviewers of documents with this status should be notified automatically and the workflow is to be auto initiated. If you select no, 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 change the reviewer sequence for the document(s) if required before initiating the review process.
- 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.

6.4 REVIEW TEAM RULES AND REVIEW SETTINGS

Review teams in InEight Document are pre-defined either on a per discipline or free form basis so when the workflow for a document is activated the system knows which reviewers notify in each sequence.

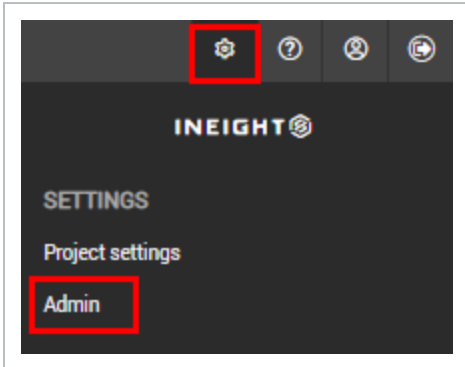
In addition to defining review teams, the document review coordinator is specified. This is the company and contact responsible for managing the review process and workflow for restrained documents for each review team. The review coordinator is also responsible for consolidating the review comments and applying a review status once reviewers have completed their individual reviews.

There are three steps in relation to defining review teams and review settings:

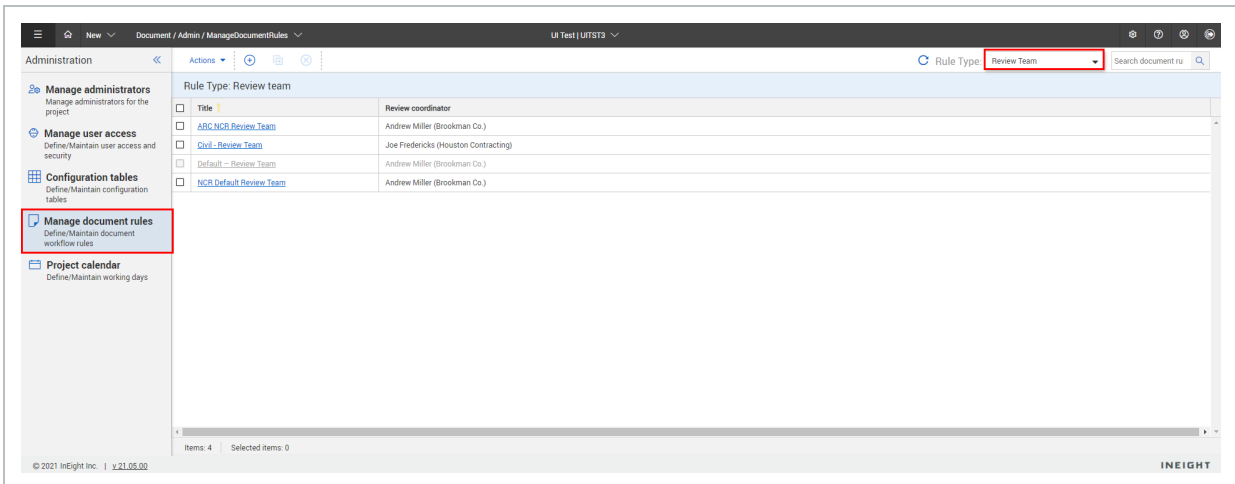
1. Define the review team title and discipline which controls which documents will be assigned to this team.
2. Define the review and release defaults for the team.
3. Define the review team and review coordinator.

6.4.1 Define the review team

1. Click the **cogwheel icon** and select **Admin**.

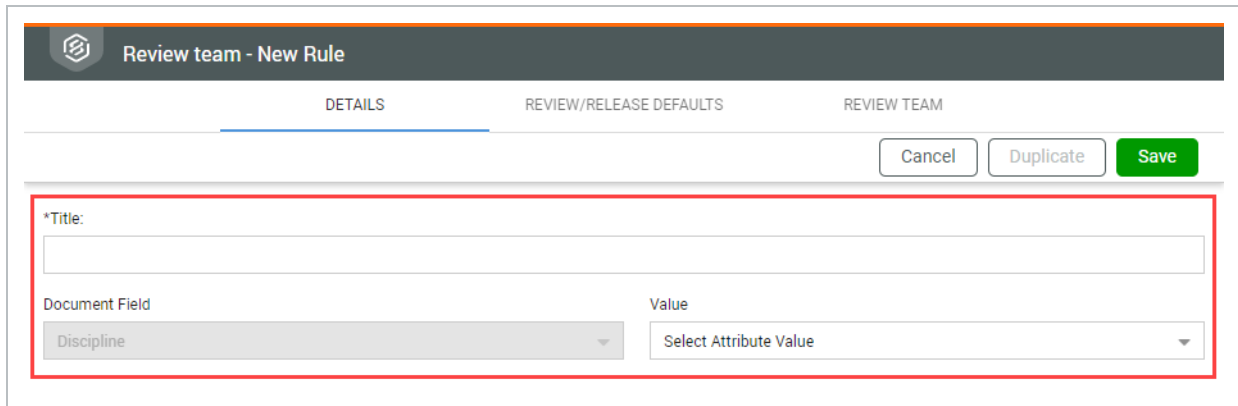


2. Select **Manage document rules**.
3. In the **Rule type** drop-down menu, select **Review Team**.



4. Click the **plus icon**.

5. Enter in a title and select the status value.



The screenshot shows a web interface for creating a new review team rule. The title bar reads "Review team - New Rule". There are three tabs: "DETAILS", "REVIEW/RELEASE DEFAULTS", and "REVIEW TEAM". The "DETAILS" tab is selected. Below the tabs are three buttons: "Cancel", "Duplicate", and "Save". A red box highlights the "Title" field, which is currently empty, and the "Document Field" dropdown menu, which is set to "Discipline". The "Value" dropdown menu is set to "Select Attribute Value".

6. In the **Review/Release Defaults** tab, select the following options for the **Review Process**:

- **Remind reviewers every (input days):** Enter the interval for the auto-sending of reminders to reviewers if they have not completed their review by the due date.
- **Default review duration in (input days):** This is the default duration, in working days, for each user to complete their review.
- **Automatically complete document review in (input days) after the due date:** This option can be enabled to have the system automatically complete each reviewers review (with no comments) if they do not complete their review prior to the defined number of days after their due date.
- **Notify Review Coordinator of delays in the review process:** Select whether to notify the review coordinator of any delays in the review process.

Review team - New Rule

DETAILS REVIEW/RELEASE DEFAULTS REVIEW TEAM

Cancel Duplicate Save

Review process:

Remind reviewers every (input) days:

Default review duration in (input) days:

Automatically complete document review in (input) days after the due date

Can send to Review Coordinator bypassing other reviews

Notify Review Coordinator of delays in the review process

Release process:

Notify Review Coordinator of delays in the release process

Notify Administrator of delays in the release process

Default release duration in (input) days:

Automatically complete document release in (input) days after the due date

With review status code:

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7. In the **Review/Release Defaults** tab, select the following options for the **Release Process**:

- **Notify Review Coordinator of delays in the release process:** Select whether to notify the review coordinator of any delays in the release process.
- **Notify Administrator of delays in the release process:** Select whether to notify the administrator of any delays in the release process.
- **Default release duration in (input days):** The default duration allocated to release a document after all reviewers have completed their review. This is used as a trigger to control the notifications regarding delays in the release process.
- **Automatically complete document release in (input days) after the due date:** This option enables the system to automatically release documents if the review coordinator has not released them prior to a defined number of days after the due date. If this option is enabled, select the review status code to be assigned in case of an automatic release.

Review team - New Rule

DETAILS **REVIEW/RELEASE DEFAULTS** REVIEW TEAM

Cancel Duplicate Save

Review process:

Remind reviewers every (inputed) days:

Default review duration in (inputed) days:

Automatically complete document review in (inputed) days after the due date Notify Review Coordinator of delays in the review process

Can send to Review Coordinator bypassing other reviews

Release process:

Notify Review Coordinator of delays in the release process Notify Administrator of delays in the release process

Default release duration in (inputed) days:

Automatically complete document release in (inputed) days after the due date

With review status code:

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8. In the **Review Team** tab, select the following options:

- **Document review coordinator:** Set as either user or role.
- **Document review coordinator company:** Select the company.
- **Document review coordinator:** Select the coordinator.
- **Total review duration in (input days):** Enter in the total amount of days the review must be completed by.

Review team - New Rule

DETAILS REVIEW/RELEASE DEFAULTS REVIEW TEAM

Cancel Duplicate Save

*Document review coordinator: User Role

*Document review coordinator company: Select a company

*Document review coordinator: Select a contact

Total review duration in (inputed) days

Display: User Roles Free form review teams

Select companies, departments and users to allocate

19.1 Company Search

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	SD SD

Allocated companies, departments and users [Clear allocated](#)

Search

Name	Company	Sequence
No records t		

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9. Select the company.

10. Select the contact and click the **arrow icon**.

The screenshot shows the 'Review team - New Rule' configuration page. The 'REVIEW TEAM' tab is selected. The page includes fields for 'Document review coordinator' (User/Role), 'Document review coordinator company', and 'Document review coordinator' (Select a contact). There is a 'Total review duration in (inputed) days' field and a 'Display' section with radio buttons for 'User', 'Roles', and 'Free form review teams'. Below this, there are two search bars: 'Select companies, departments and users to allocate' and 'Allocated companies, departments and users'. The first search bar shows '19.1 Company' selected. The second search bar shows a table with columns 'Name', 'Company', and 'Sequence'. The table is currently empty, showing 'No records t'. A red box highlights the 'SD SD' user in the search results, and a blue arrow points to the right, indicating the action to be taken.

11. For each contact, select the following options:

- **Sequence:** The 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 review. If using parallel reviews, the sequence should be the same for each user so that all users will receive the documents at the same time.
- **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:** This indicates that a reviewer is not required to complete a review before the next reviewer in the sequence. This option is only available where two or more reviewers are at the same sequence. One reviewer must be mandatory in the sequence to enable others to be optional.
- **Either:** This indicates that if one of two reviewers marked as **Either** completed a review, the reviewer in the next sequence will be notified. If other mandatory reviewers have not

yet completed their review at the same sequence, it will not move on. This option requires at least two reviewers at the same sequence in a review team.

Allocated companies, departments and users [Clear allocated](#)

Name	Company	Sequence	Duration (Days)	Optional	Either
SD SD	19.1 Company	0	0	<input type="checkbox"/>	<input type="checkbox"/>

12. Click **Save**.

NOTE

- If no users are assigned to a review team, the workflow is considered as a 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.
- 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**.

6.4.2 Manage teams in bulk

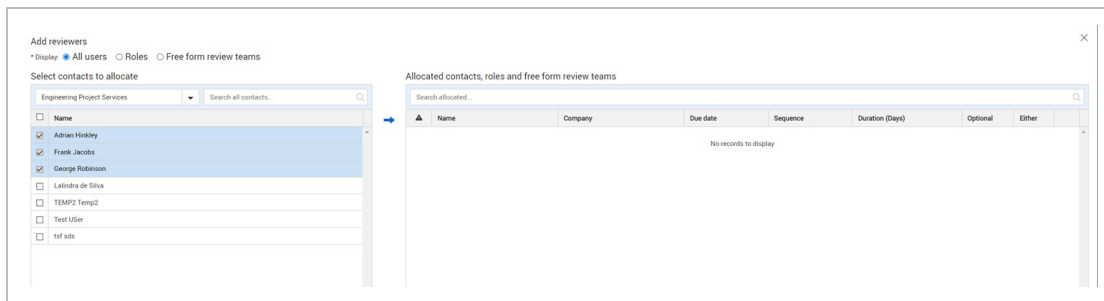
You can add, remove, or replace users and free-form review teams in document rules in bulk.

6.4 Step by Step 1 — Add reviewers to multiple document rules

When you have one or more reviewers to add to multiple document rules, you can save time by adding reviewers to rules in bulk.

1. From the Review team Rule Type page (Settings > Admin > Manage document rules > **Review team**), select multiple teams.
2. Expand the **Actions** menu, and then select **Add reviewers**. The Add reviewers dialog box opens that shows a list of applicable users or roles.

3. Select the radio button for **All users** or **Roles**, and then enter the company name. A list of contacts is shown.



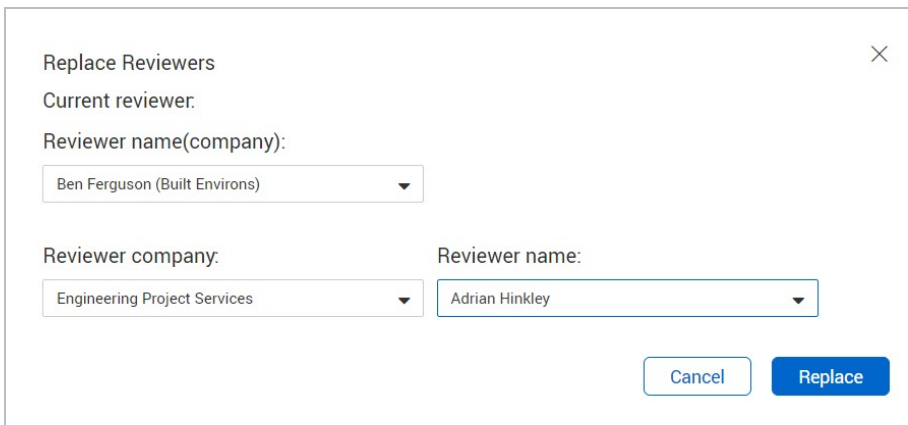
4. Select the contacts you want to add to the team, and then click the arrow to move them to the Allocated contacts, roles and free form review teams section.
5. Enter the Sequence and Duration days for each user, and then click **Save**. The reviewers are added to the selected review teams.

You can copy attributes from a reviewer to the new reviewers.

6.4 Step by Step 2 — Replace reviewers in multiple review teams

When you want to replace reviewers in multiple review teams, you can save time by replacing the reviewers in bulk.

1. From the Review team Rule Type page (Settings > Admin > Manage document rules > **Review team**), select multiple teams.
2. Expand the **Actions** menu, and then select **Replace reviewers**. The Replace reviewers dialog box opens.
3. Enter the name of the current reviewer that you want to replace, and then select the company and reviewer name of the replacement.



Replace Reviewers ✕

Current reviewer:

Reviewer name(company):

Ben Ferguson (Built Environs) ▼

Reviewer company: Reviewer name:

Engineering Project Services Adrian Hinkley ▼

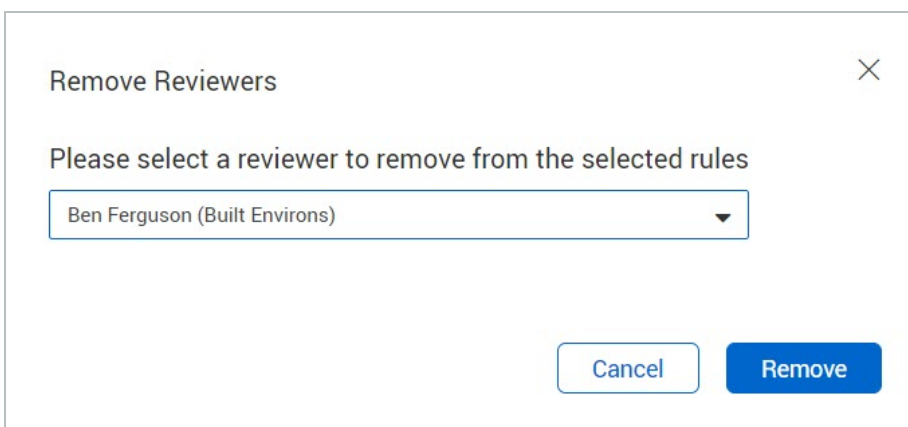
Cancel Replace

4. Click **Replace**. The reviewer is replaced in the selected review teams.

6.4 Step by Step 3 — Remove a reviewer from multiple review teams

When you want to remove a reviewer from multiple review teams, you can save time by removing the reviewers in bulk.

1. From the Review team Rule Type page (Settings > Admin > Manage document rules > **Review team**), select multiple teams.
2. Expand the **Actions** menu, and then select **Remove reviewers**. The Remove reviewers dialog box opens.
3. Select the name of the reviewer you want to remove, and then click **Remove**. The reviewer is removed from the selected review teams.



Remove Reviewers ✕

Please select a reviewer to remove from the selected rules

Ben Ferguson (Built Environs) ▼

Cancel Remove

6.4 Step by Step 4 — Copy attributes from one reviewer to other reviewers

After you add reviewers, you can save time defining their attributes by copying the attributes of another reviewer on the team and applying them to the new members.

1. From the Review team Rule Type page (Settings > Admin > Manage document rules > **Review team**), click on a review team to open it, and then go to the **Review team** tab.

The screenshot shows the 'Review team - TS-01' configuration page. The 'REVIEW TEAM' tab is selected. The page displays settings for document review coordinator, company, and duration. A table of 'Allocated contacts, roles and free from review teams' is visible, with a 'Copy Attributes' button highlighted. The table lists reviewers with columns for Name, Company, Sequence, Duration (days), Optional, and Either.

Name	Company	Sequence	Duration (days)	Optional	Either
DP	(Role)	1	5	<input type="checkbox"/>	<input type="checkbox"/>
AI A1	A company	1	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adrian Hinkley	Engineering Project Services	1	1	<input type="checkbox"/>	<input type="checkbox"/>
Ben Ferguson	Bulk Envoiros	1	4	<input type="checkbox"/>	<input type="checkbox"/>
Frank Jacobs	Engineering Project Services	1	1	<input type="checkbox"/>	<input type="checkbox"/>
George Roberson	Engineering Project Services	1	1	<input type="checkbox"/>	<input type="checkbox"/>
Thana Siva	JBL COMPANY	1	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dupltest Test	Houston Contracting	2	2	<input type="checkbox"/>	<input type="checkbox"/>
DP	(Role)	3	5	<input type="checkbox"/>	<input type="checkbox"/>
Adrian Hinkley	Engineering Project Services	4	1	<input type="checkbox"/>	<input type="checkbox"/>
Frank Jacobs	Engineering Project Services	4	1	<input type="checkbox"/>	<input type="checkbox"/>
George Roberson	Engineering Project Services	4	1	<input type="checkbox"/>	<input type="checkbox"/>

2. Select the name of the reviewer whose attributes you want to copy, and then click **Copy attributes**. The Copy Attributes dialog box opens.
3. Select where to place the copied attributes and the number of rows.

Copy attributes ✕

Select where to place copied attributes: Enter row amount:

Select the attributes to copy:

<input checked="" type="checkbox"/>	Attribute	Value
<input checked="" type="checkbox"/>	Sequence	1
<input checked="" type="checkbox"/>	Duration (Days)	4
<input checked="" type="checkbox"/>	Optional	No
<input checked="" type="checkbox"/>	Either	No

4. Select the attributes you want to copy, and then click **Apply**.

CHAPTER 7 – USING THE PROJECT CREATION TOOL

For information on Using The Project Creation Tool, see the links below.

7.1 Accessing the Project Creation Tool	197
7.2 Creating a New Project	197
7.3 Changing Your Password	198
7.4 Understanding Terminology	198
7.4.1 General	198
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7.1 ACCESSING THE PROJECT CREATION TOOL

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:

- A quick and simple way to create new projects based on existing projects.
- A wide variety of register default options available.
- The ability to transfer data from specified modules into the new project including configuration tables, address books and document rules.
- The automatic selection of certain fields to ensure data integrity.

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.

Access to the project creation tool can be granted to additional project users by request. Contact InEight for more information.

7.2 CREATING A NEW PROJECT

1. Go to the URL provided by your administrator.
2. Log in using the username and password provided (separate to your InEight Document credentials).
3. Select the base project you wish to use.
4. Pre-fill and populate the project specific drop-down menus in this form.
5. Fill in all required fields, taking note of all mandatory fields marked with an *.
6. Select mail and document defaults (these can be updated from project settings once the project has been established in InEight Document if required).
7. Select the data you wish to export from the base project into the new project.
8. Click **Finish** once complete, or **Clear** if you wish to start again. The form will then show whether the project has been successfully created and if there are any errors.

7.3 CHANGING YOUR PASSWORD

1. In the top right corner of the page, click **Change Password**.
2. Enter in your existing password, followed by your new password.
3. Confirm your new password.
4. Click **Save**. then confirm the New Password.

7.4 UNDERSTANDING TERMINOLOGY

The following tables describe each field found in the project creation tool.

7.4.1 General

Field	Description
Base Project No.	This drop-down menu provides a list of existing projects to choose from. Project-specific selections in the remainder of this form will be updated based on the project selected but can also be manually updated as required.
Project No.	The project number as it will appear in InEight Document. This is limited to 10 alphanumeric characters. There must be no spaces and no special

Field	Description
	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	The time zone of the host company.
Administrator	The contact name of the primary administrator for the project as listed in InEight Document.
Contact Details	The details in the contact fields will be populated with the same details of the selected base project.

7.4.2 Custom

Field	Description
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 at which the system will send email notifications relating to each event type in InEight Document. For example, if set to 30 minutes and 20 documents are uploaded and released within this time frame, each recipient on the distribution matrix will receive one notification listing 20 documents.
Document download expires in	The value entered in this field will determine how long users can download a document after they have received a notification.
Respond to transmittals within	This is the default number of working days used to calculate the respond by date for transmittals, based on the current date and number of days defined here.
Select global address book	The project will be linked to the nominated global address book.
User password	This is the number of days after which users will be required to change their password.

Field	Description
expires in	
Enable TenderDocs	Enables the TenderDocs 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, the project itself will become the base global gallery project.

7.4.3 Mail and Document Register Defaults

Field	Description
Minimum document length	The minimum document length as 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 and recipients.
Enable carry forwarding	Used to set that outstanding comments against a document (not closed out) are automatically carried forward to the next revision.
Enable redlining and commenting once the document has completed the review workflow	Used to enable the ongoing redlining 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.

Field	Description
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).
Enable transmitted document access	Enables the option under the 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 and 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 mail and transmittal numbering	Enabling this feature allows the user to specify which company ID prefix the admin company will be known by (usually this is the company ID).
Set support user as additional administrator	Add SUPPORT/QAS user as an additional project administrator.

CHAPTER 7 – USING THE PROJECT CREATION TOOL

For information on Using The Project Creation Tool, see the information below.

7.0.1 Accessing the Project Creation Tool

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:

- A quick and simple way to create new projects based on existing projects.
- A wide variety of register default options available.
- The ability to transfer data from specified modules into the new project including configuration tables, address books and document rules.
- The automatic selection of certain fields to ensure data integrity.

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.

Access to the project creation tool can be granted to additional project users by request. Contact InEight for more information.

7.0.2 Creating a New Project

1. Go to the URL provided by your administrator.
2. Log in using the username and password provided (separate to your InEight Document credentials).
3. Select the base project you wish to use.
4. Pre-fill and populate the project specific drop-down menus in this form.
5. Fill in all required fields, taking note of all mandatory fields marked with an *.

6. Select mail and document defaults (these can be updated from project settings once the project has been established in InEight Document if required).
7. Select the data you wish to export from the base project into the new project.
8. Click **Finish** once complete, or **Clear** if you wish to start again. The form will then show whether the project has been successfully created and if there are any errors.

7.0.3 Changing Your Password

1. In the top right corner of the page, click **Change Password**.
2. Enter in your existing password, followed by your new password.
3. Confirm your new password.
4. Click **Save**. then confirm the New Password.

7.0.4 Understanding Terminology

The following tables describe each field found in the project creation tool.

7.0.4.1 General

Field	Description
Base Project No.	This drop-down menu provides a list of existing projects to choose from. Project-specific selections in the remainder of this form will be updated based on the project selected but can also be manually updated as required.
Project No.	The project number as it will appear in InEight Document. This is limited to 10 alphanumeric 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	The time zone of the host company.

Field	Description
Administrator	The contact name of the primary administrator for the project as listed in InEight Document.
Contact Details	The details in the contact fields will be populated with the same details of the selected base project.

7.0.4.2 Custom

Field	Description
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 at which the system will send email notifications relating to each event type in InEight Document. For example, if set to 30 minutes and 20 documents are uploaded and released within this time frame, each recipient on the distribution matrix will receive one notification listing 20 documents.
Document download expires in	The value entered in this field will determine how long users can download a document after they have received a notification.
Respond to transmittals within	This is the default number of working days used to calculate the respond by date for transmittals, based on the current date and number of days defined here.
Select global address book	The project will be linked to the nominated global address book.
User password expires in	This is the number of days after which users will be required to change their password.
Enable TenderDocs	Enables the TenderDocs feature.
Enable full text search	Enables content searches within mail attachments and document view files.
Select	Use this option to select the base customisation template package to deploy if

Field	Description
customization to be deployed	relevant.
Select global gallery project	Indicates which base global gallery project to use. If not selected, the project itself will become the base global gallery project.

7.0.4.3 Mail and Document Register Defaults

Field	Description
Minimum document length	The minimum document length as 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 and recipients.
Enable carry forwarding	Used to set that outstanding comments against a document (not closed out) are automatically carried forward to the next revision.
Enable redlining and commenting once the document has completed the review workflow	Used to enable the ongoing redlining 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).
Enable transmitted document access	Enables the option under the company screen to give other users access to documents transmitted to their company.

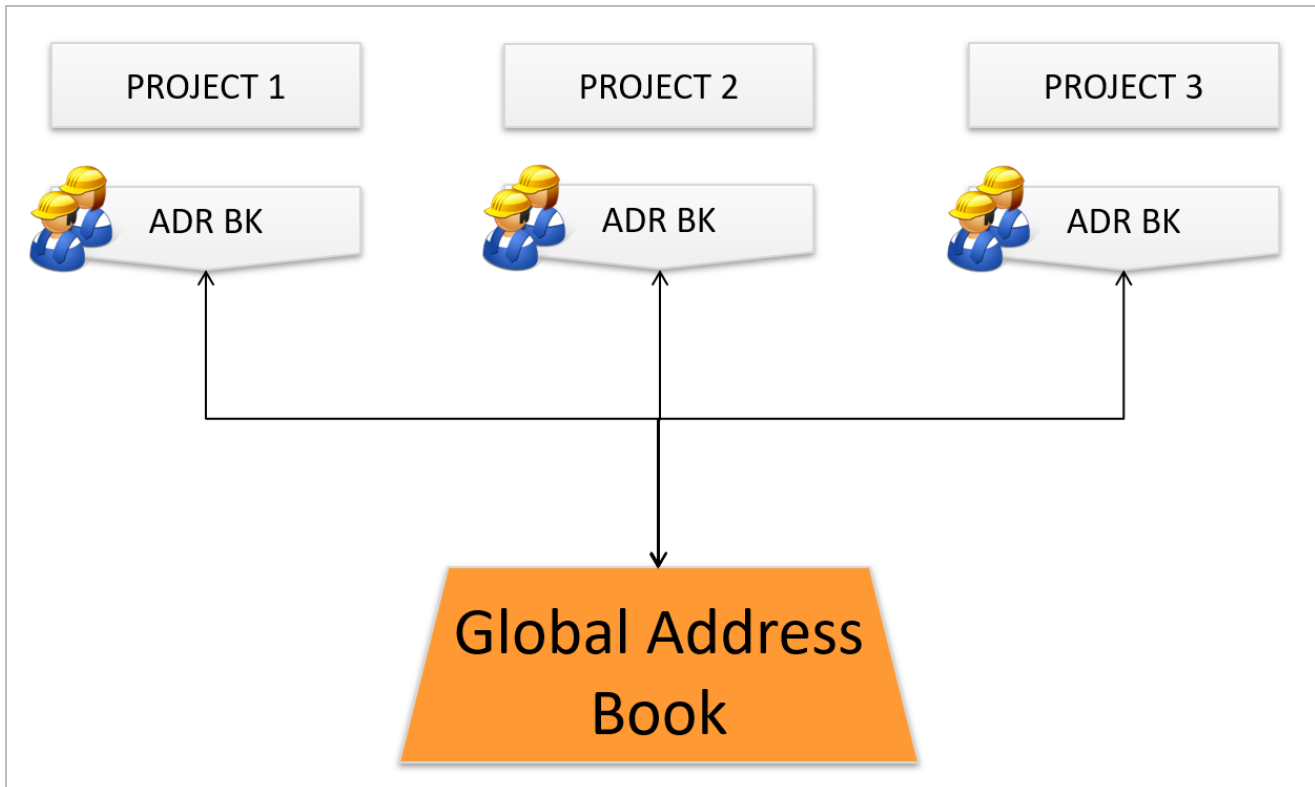
Field	Description
Show checked out documents as latest documents	This removes the default option of checked out documents not shown as the latest.
Email in for admin company	Specify the email in address. This is an integrated email service for InEight Document which enables incoming emails sent to a 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 and 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 mail and transmittal numbering	Enabling this feature allows the user to specify which company ID prefix the admin company will be known by (usually this is the company ID).
Set support user as additional administrator	Add SUPPORT/QAS user as an additional project administrator.

CHAPTER 8 – USING A GLOBAL ADDRESS BOOK

8.1 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.



8.2 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.

Global Address Book includes:

Address Book

Company

Company Types

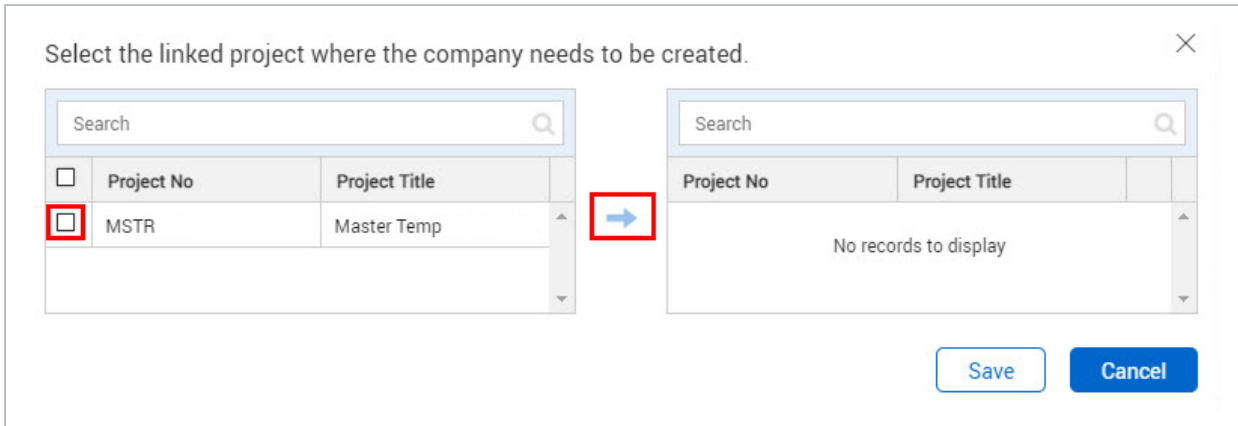
Departments

NOTE

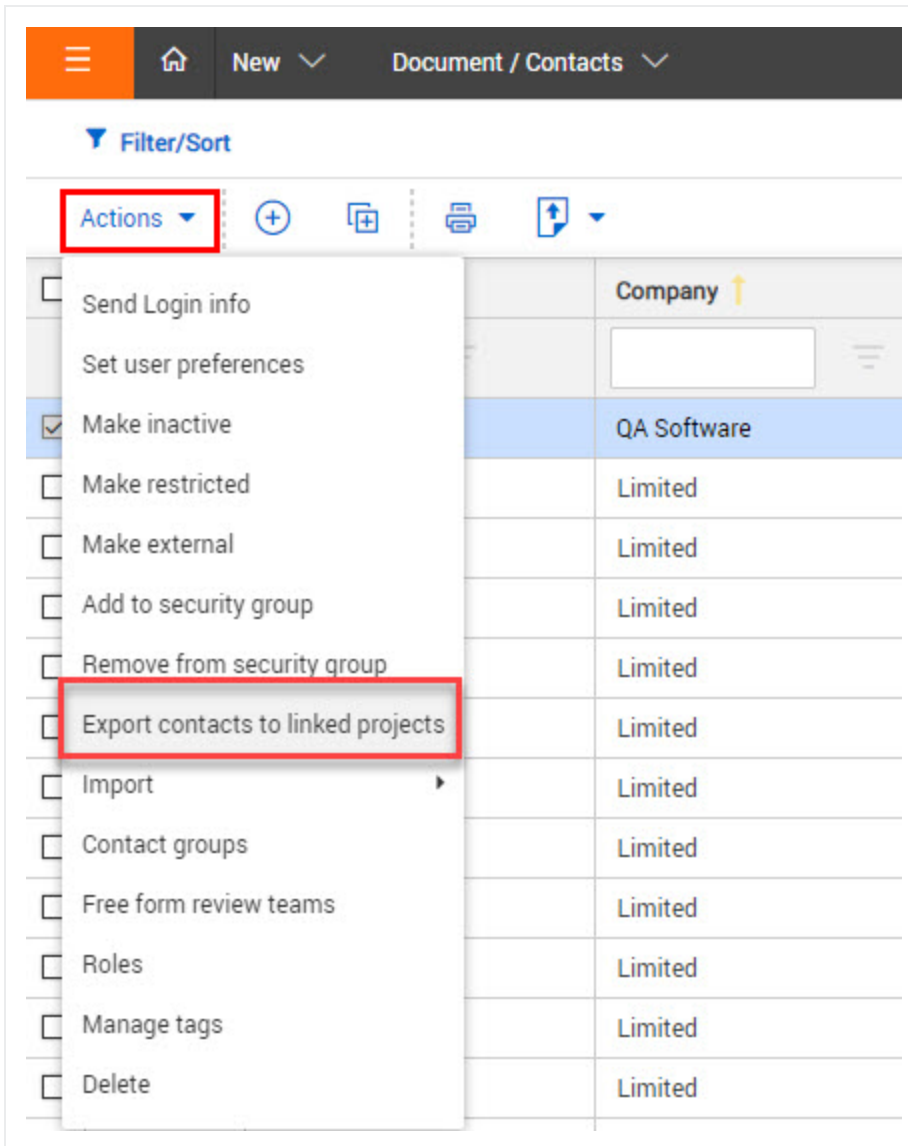
- Access to the Global Address Book project is restricted to project administrators and users from their company.
- All three elements of the Address Book (company types, companies and contacts) are integrated with the Global Address book.

8.3 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.



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



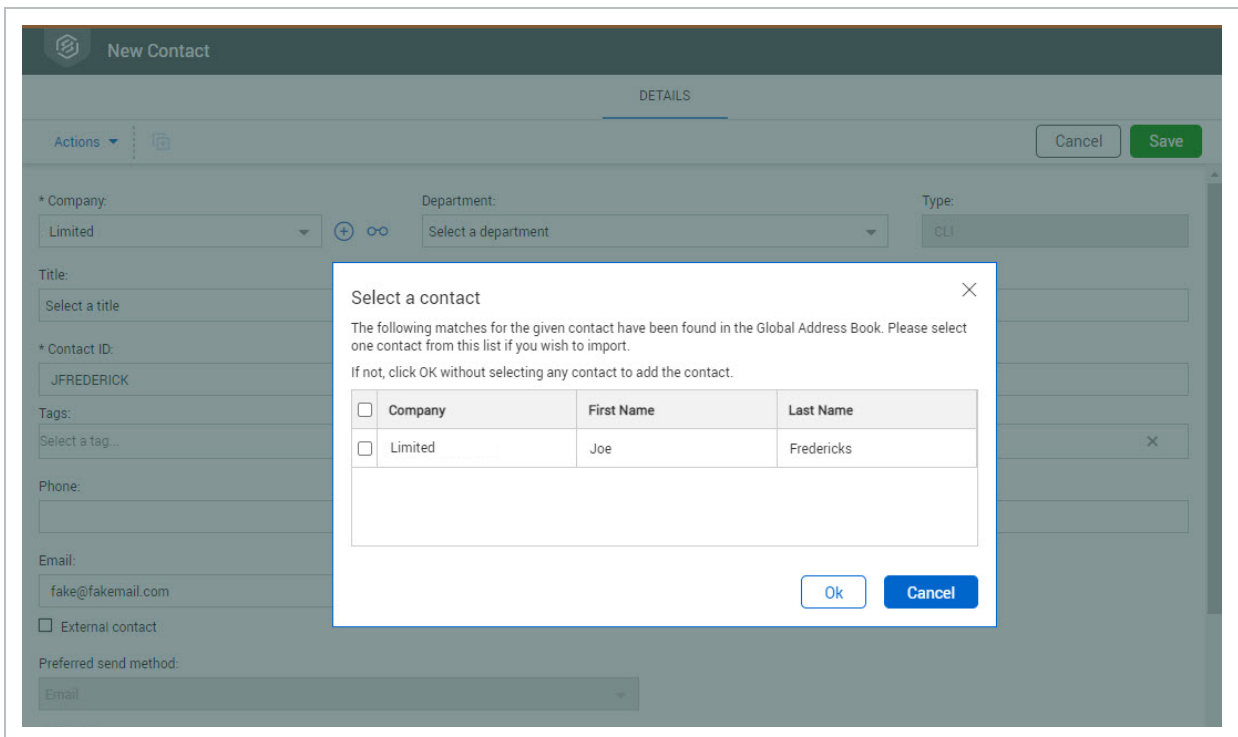
2. A link is then maintained between the details of the contact in the Global Address book and the details in the linked projects.
3. If information is changed in the Global Address Book the linked project, the contact is auto updated.

NOTE

- Users with access to the Global Address book can add contact details to the Global Address book but cannot post these directly to linked projects. The posting is a function of the Project Administrator using Export contacts option.
- Contacts can be imported into a Global Address book from projects that are using a project specific address book. In this case however there is no link maintained between the Global Address book and the source project.

8.4 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.



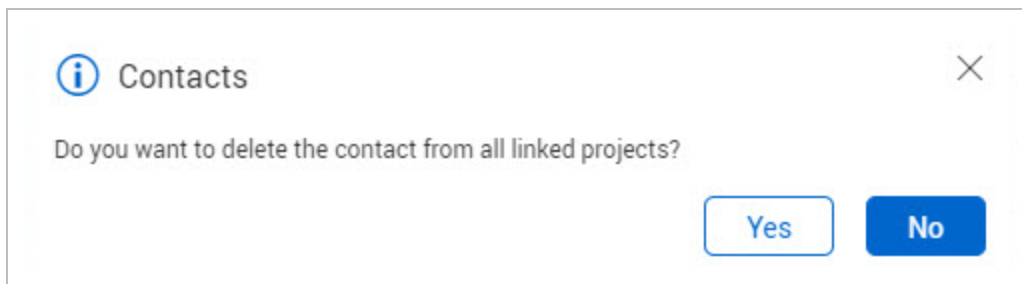
4. If linked contacts are updated in a linked project address book, the details are automatically updated in the Global address book and in other linked projects where the same contact is linked back to the Global Address Book.
5. When importing contacts from the Global Address Book project into the current project, any imported contacts are auto linked back to the Global Address Book.

8.5 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.



If a contact is deleted from a local project linked to a Global Address Book project, the Global Address Book is not affected.

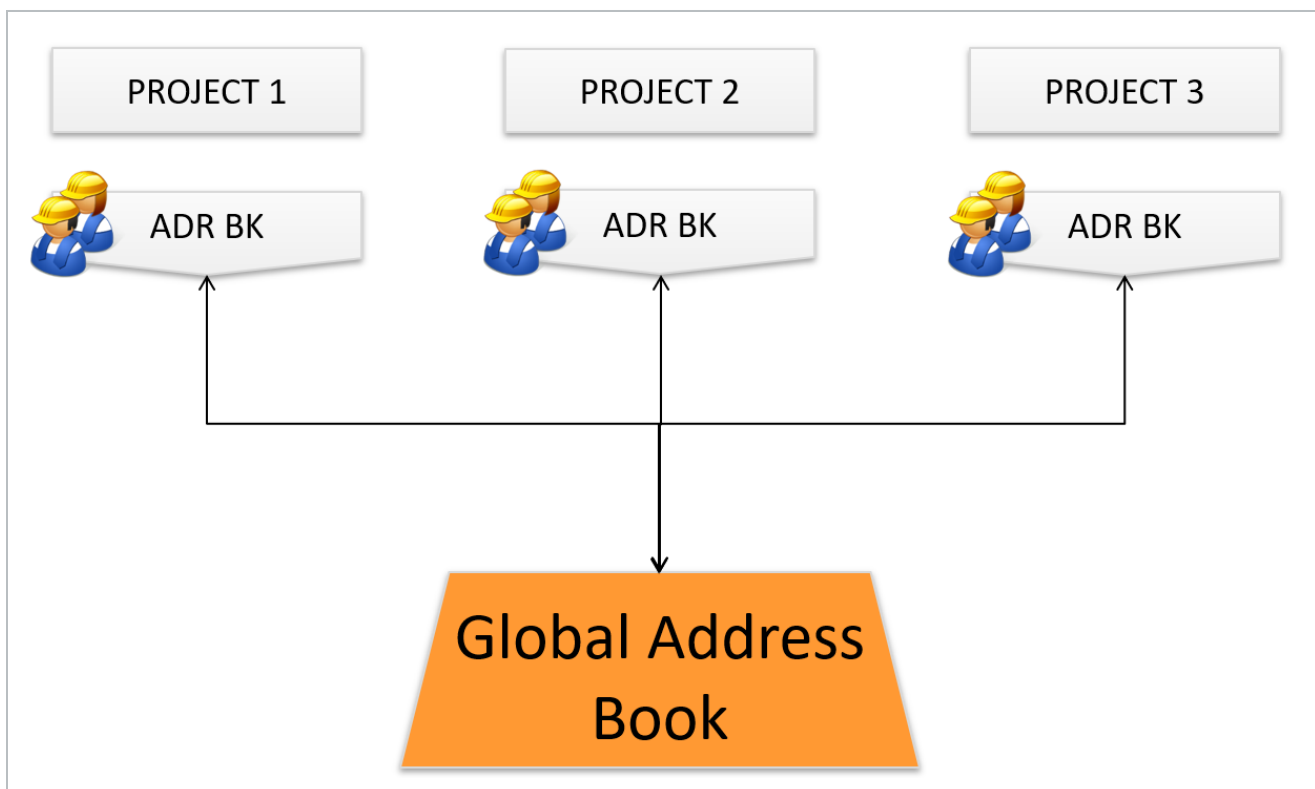
Making contacts Inactive: This is treated in a similar way to Deleting contacts.

CHAPTER 8 – USING A GLOBAL ADDRESS BOOK

8.0.1 Global Address Book 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.



8.0.2 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.

Global Address Book includes:

Address Book

Company

Company Types

Departments

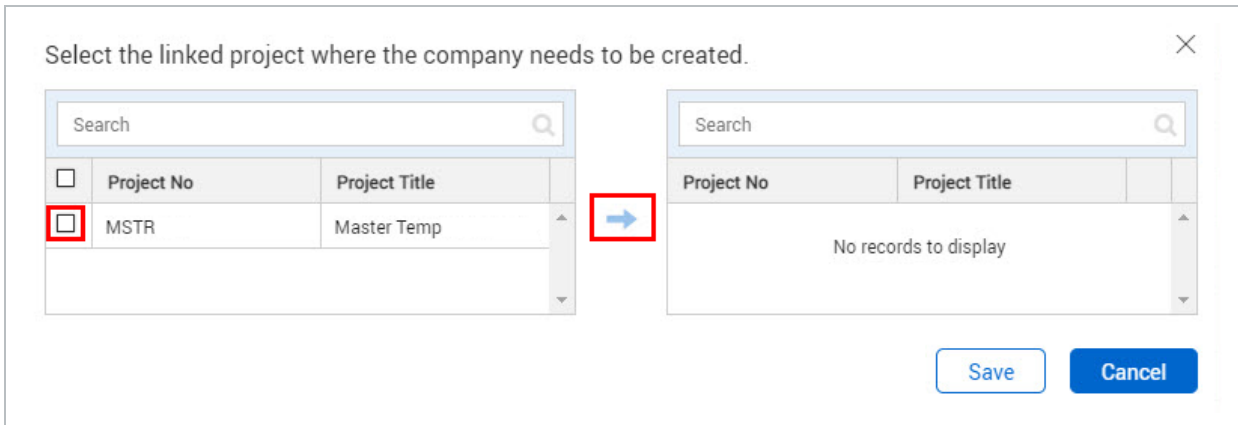
NOTE

- 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.

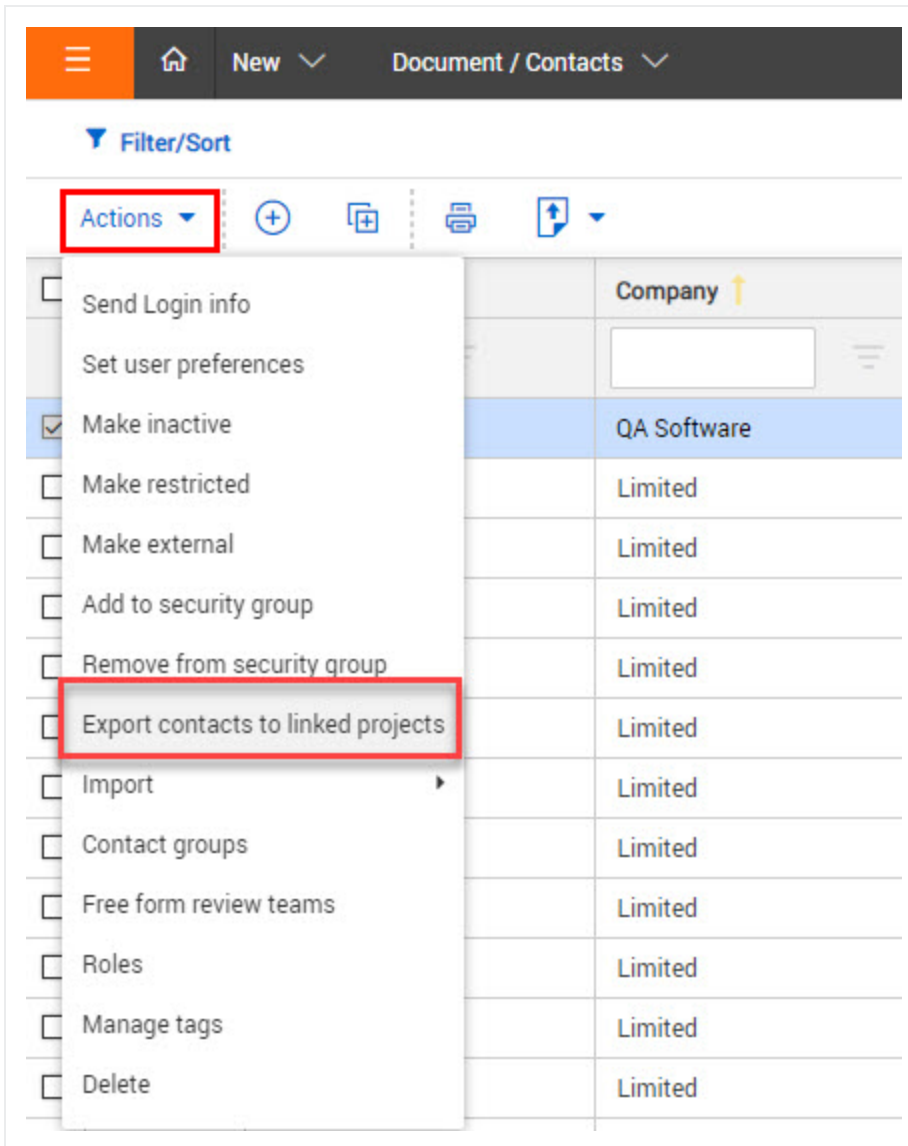
8.0.3 Populating the Global Address Book

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.



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



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.

NOTE

- Users with access to the Global Address book can add contact details to the Global Address book but cannot post these directly to linked projects. The posting is a function of the Project Administrator using Export contacts option.
- Contacts can be imported into a Global Address book from projects that are using a project specific address book. In this case however there is no link maintained between the Global Address book and the source project.

8.0.4 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.

The screenshot shows the 'New Contact' form with a modal dialog titled 'Select a contact'. The dialog contains the following text and table:

Select a contact

The following matches for the given contact have been found in the Global Address Book. Please select one contact from this list if you wish to import.
If not, click OK without selecting any contact to add the contact.

<input type="checkbox"/>	Company	First Name	Last Name
<input type="checkbox"/>	Limited	Joe	Fredericks

Buttons: Ok, Cancel

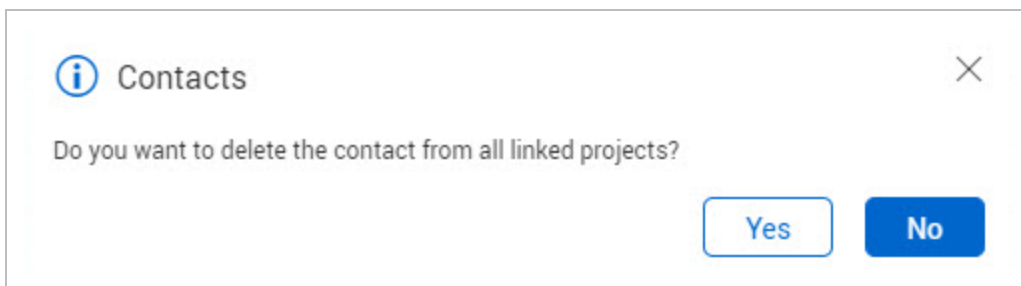
4. If linked contacts are updated in a linked project address book, the details are automatically updated in the Global address book and in other linked projects where the same contact is linked back to the Global Address Book.
5. When importing contacts from the Global Address Book project into the current project, any imported contacts are auto linked back to the Global Address Book.

8.0.5 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.



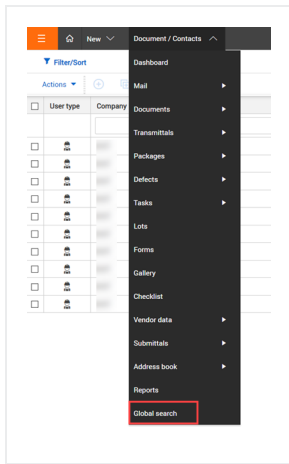
If a contact is deleted from a local project linked to a Global Address Book project, the Global Address Book is not affected.

Making contacts Inactive: This is treated in a similar way to Deleting contacts.

8.1 ACCESS GLOBAL SEARCH FUNCTIONS

You can search across modules using a global search.

To launch a global search, go to the module navigation, and then select **Global search**.



A search dialog box opens. Click **Filter/Sort** to open the Global search slide-out panel. You can then enter the project, search terms, modules to search in, and other options. The Search terms field uses advanced search functions. You can enter part of the search string and an asterisk to match multiple characters. Results are shown in a standard results panel.

