INEIGHT

DOCUMENT DRIVE USER GUIDE

DOCUMENT

Release 23.12
Revision: 1
Last Updated: 03 October 2025

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

Copyright ©2025 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

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

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

Release 23.12
Revision: 1
Last Updated: 03 October 2025

This page intentionally left blank.

CONTENTS

CHAPTER 1 – INTRODUCTION TO DOCUMENT DRIVE 7
1.1 Document Drive in InEight Document 7
1.2 Document Drive benefits 7
1.3 Document Drive Standalone application vs Windows Integration 7

CHAPTER 2 – INSTALLING INEIGHT DOCUMENT DRIVE 9
2.1 Installation Steps 9

CHAPTER 3 – DOCUMENT DRIVE WINDOWS EXPLORER INTEGRATION 11
3.1 Add Projects 11
3.2 Remove Projects 12
3.3 Introduction to the Interface 13
3.4 View Documents and Customising the Register 13
3.4.1 Folder Structure View 13
3.4.2 Document Metadata 14
3.4.3 Customise Register view 14
3.5 Uploading Documents via the Explorer Interface 14
3.5.1 In Document register 14
3.5.2 In Tray icon area 15
3.6 Managing Gallery and Publish Reports using Windows Explorer Integration 16
3.6.1 Uploading items using Document Drive 16
3.6.2 Viewing files 17
3.6.3 Deleting Items 18
3.7 Windows Explorer Integration Preferences 18
3.7.1 Accessing Windows Explorer Integration Preferences 18
3.7.2 Preference Options 19

CHAPTER 4 – DOCUMENT DRIVE WINDOWS STANDALONE APPLICATION 21
4.1 Add / Remove Projects 21
4.2 Introduction to the Interface 21
4.3 Viewing Documents within Register 22
4.4 Uploading Documents 23

4.4.1 Standard Single upload 23
4.4.2 Bulk upload 23
4.4.3 Downloading from Microsoft OneDrive 24
4.4.4 Uploading to Microsoft OneDrive 25
4.5 Managing Gallery via the Windows Application 26
4.5.1 Images and videos can be uploaded from OneDrive by using two methods: 27
4.6 Managing Published Reports via the Windows Application 27
4.6.1 Files can be uploaded from OneDrive by using the option; 28

LESSON 4 – WINDOWS STANDALONE APPLICATION SETTINGS 29

CHAPTER 1 – INTRODUCTION TO DOCUMENT DRIVE

For information on Introduction To Document Drive, see the links below.

1.1 DOCUMENT DRIVE IN INEIGHT DOCUMENT

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

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

1.2 DOCUMENT DRIVE BENEFITS

Some of the benefits of Document Drive include:

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

1.3 DOCUMENT DRIVE STANDALONE APPLICATION VS WINDOWS INTEGRATION

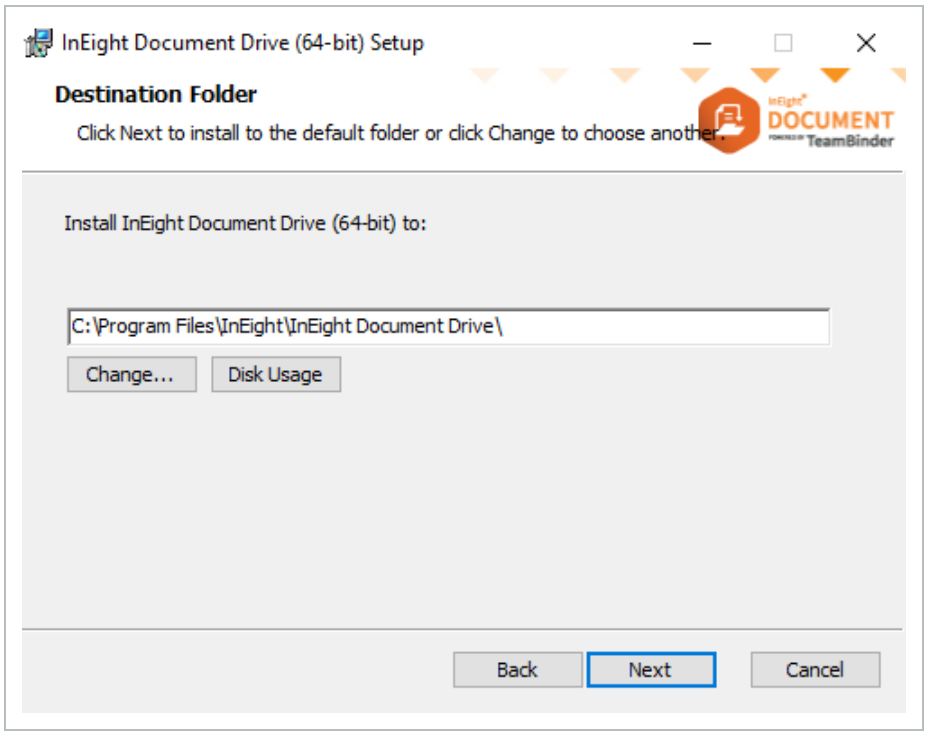
Windows Integration	Standalone Application
Familiar Windows interface.	Simplified register view.
Ability to select project view or folder structure view.	Grid view with clear metadata display in register.
Ability to upload a single document.	Bulk Upload available via drag and drop
Ability to select which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

CHAPTER 2 – INSTALLING INEIGHT DOCUMENT DRIVE

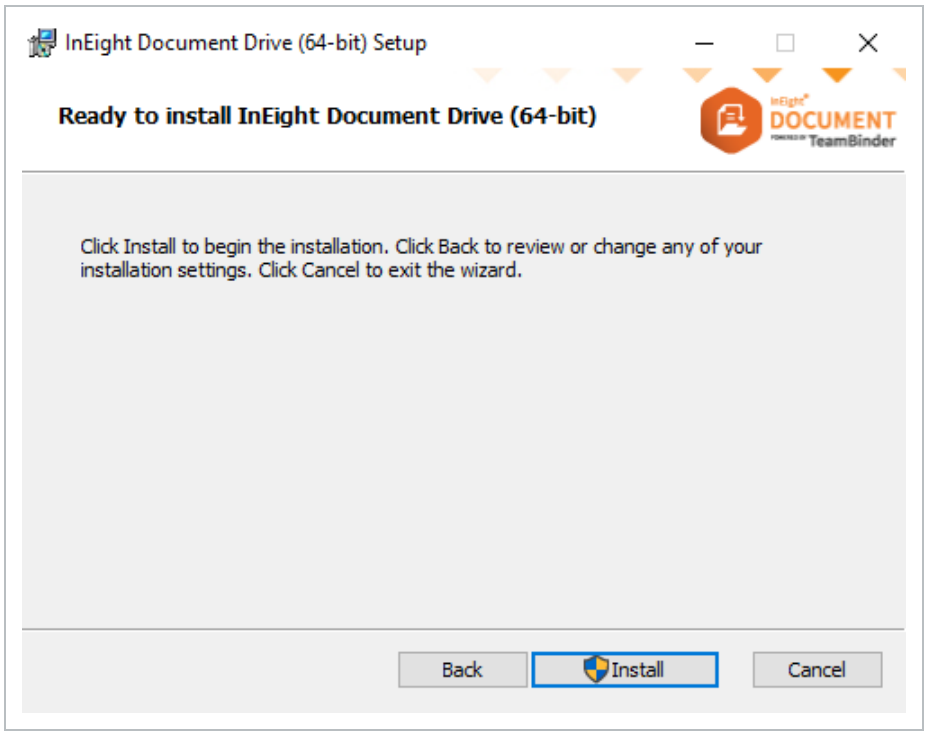
For information on Installing InEight Document Drive, see the links below.

2.1 INSTALLATION STEPS

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

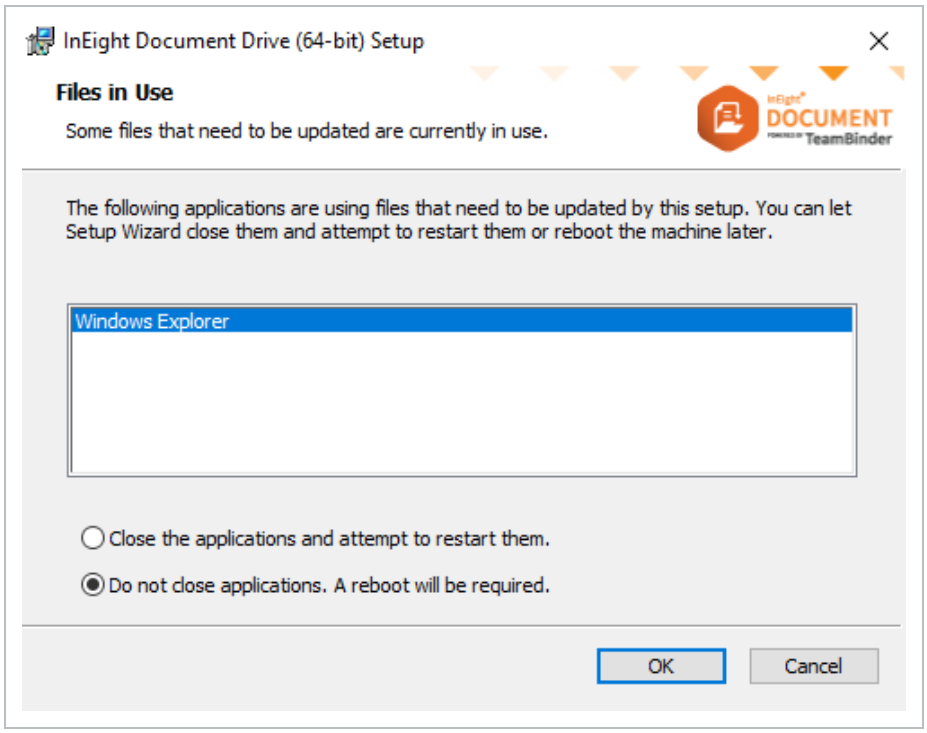


5. Click **Next** once more then **Install**.



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

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



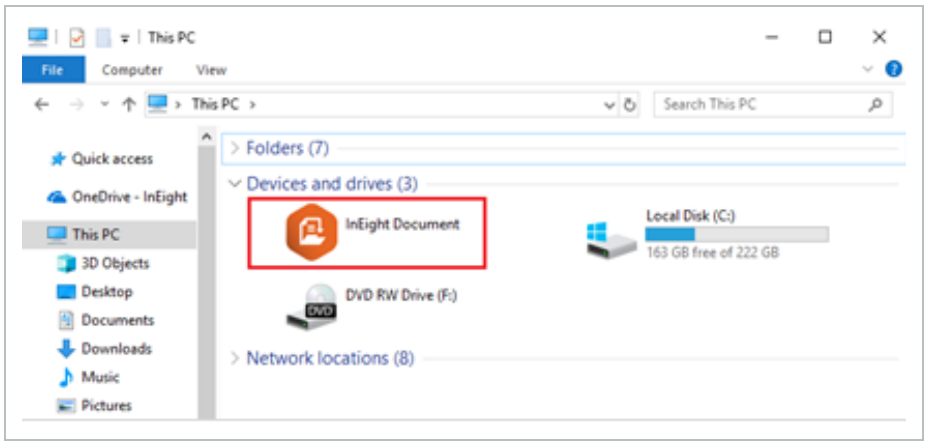
CHAPTER 3 – DOCUMENT DRIVE WINDOWS EXPLORER INTEGRATION

For information on Document Drive Microsoft Windows Explorer Integration, see the links below.

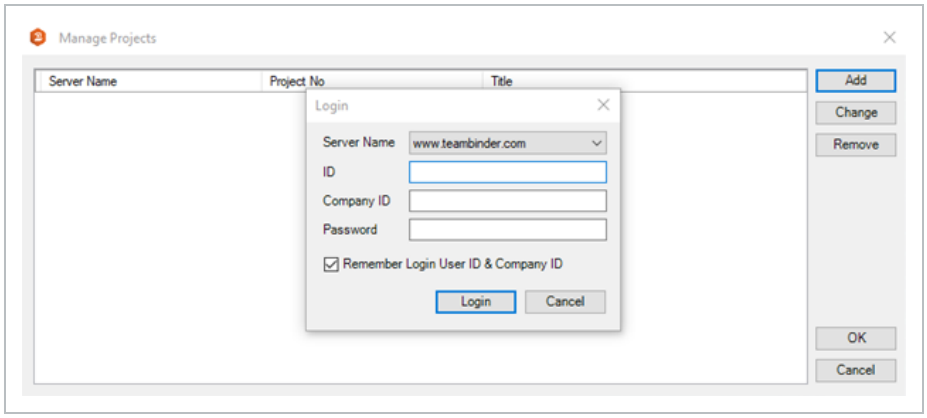
3.1 ADD PROJECTS

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

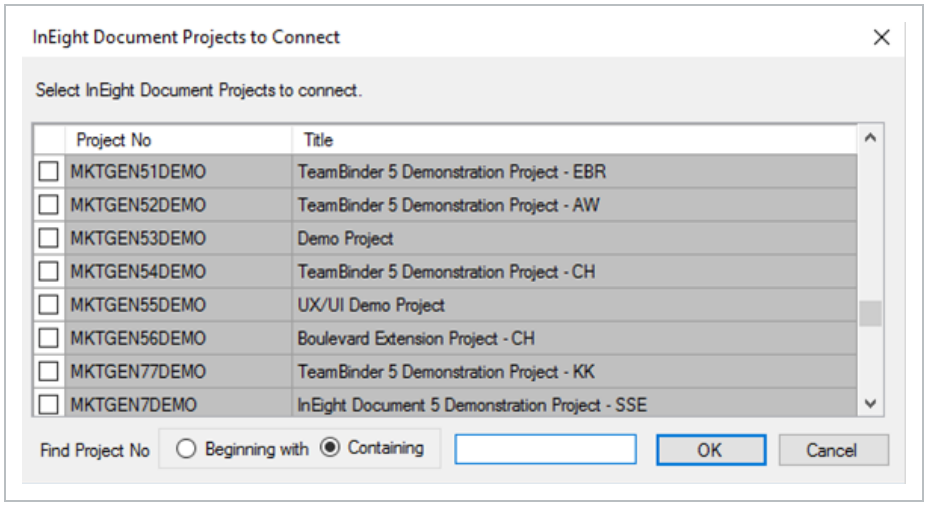
1. Double click on **Drive** to open the application in Windows.



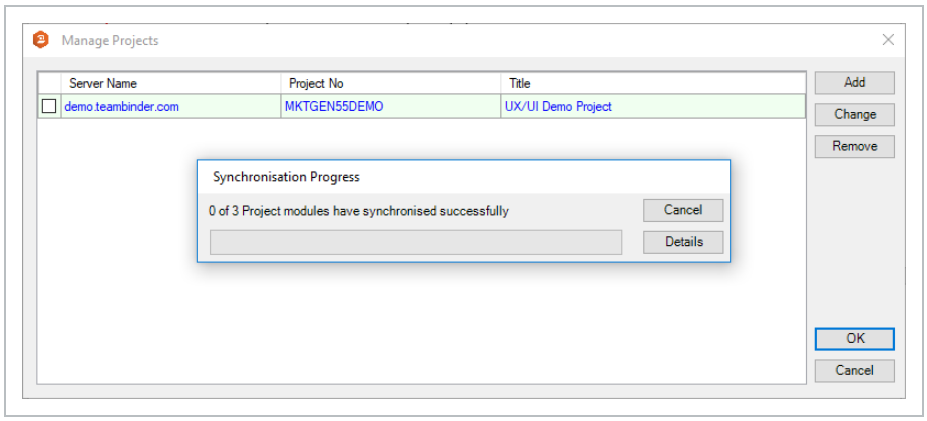
2. Right click and select **Manage Projects**.



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



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



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

3.2 REMOVE PROJECTS

To remove existing project, simply follow these steps:

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

3.3 INTRODUCTION TO THE INTERFACE

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

3.4 VIEW DOCUMENTS AND CUSTOMISING THE REGISTER

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

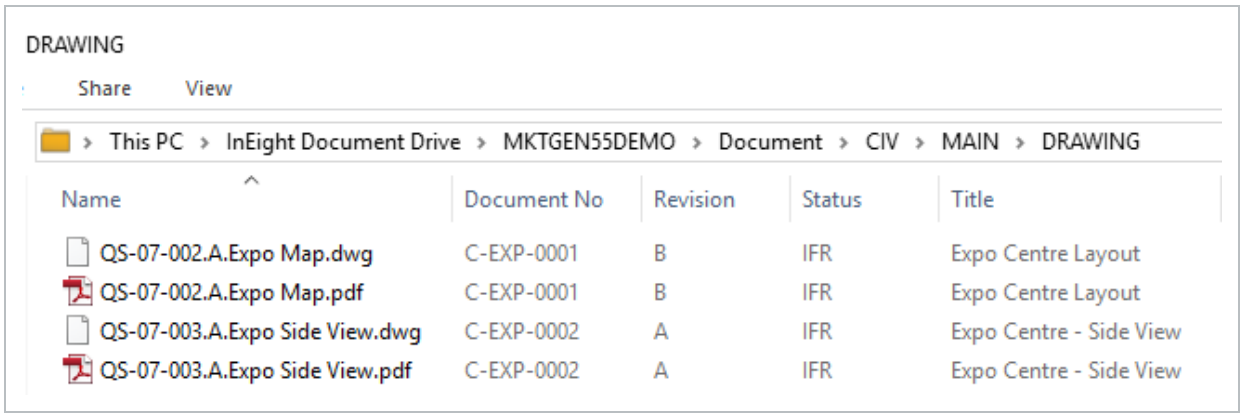
3.4.1 Folder Structure View

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

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

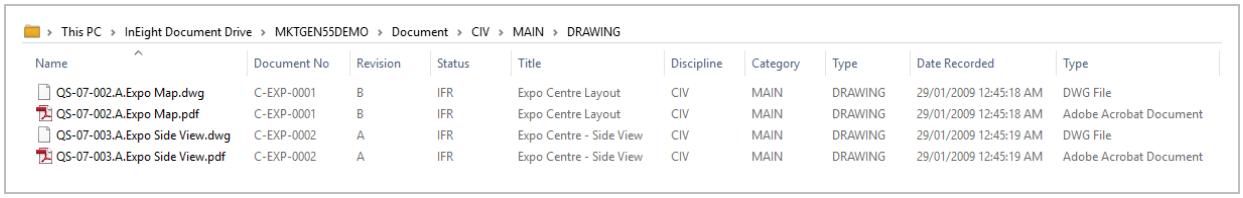
- Discipline: CIV – Civil
- Category: Main

- Type: DRAWING



3.4.2 Document Metadata

1. In this view, users will see a similar folder structure to that of their project.
2. User can drill down and see within a folder, document metadata is displayed according to the Documents register in the project.
3. Columns can be modified if required, as per standard Windows explorer functionality.



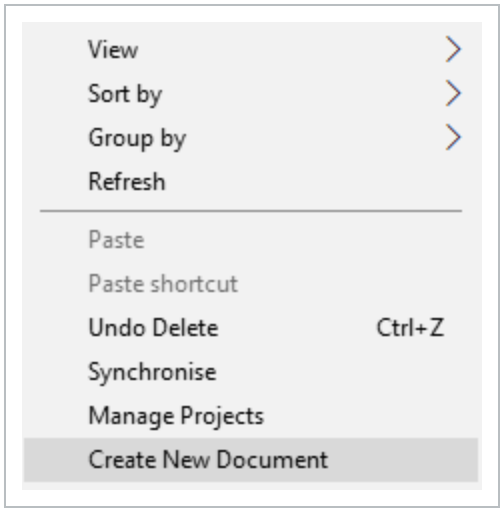
3.4.3 Customise Register view

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

3.5 UPLOADING DOCUMENTS VIA THE EXPLORER INTERFACE

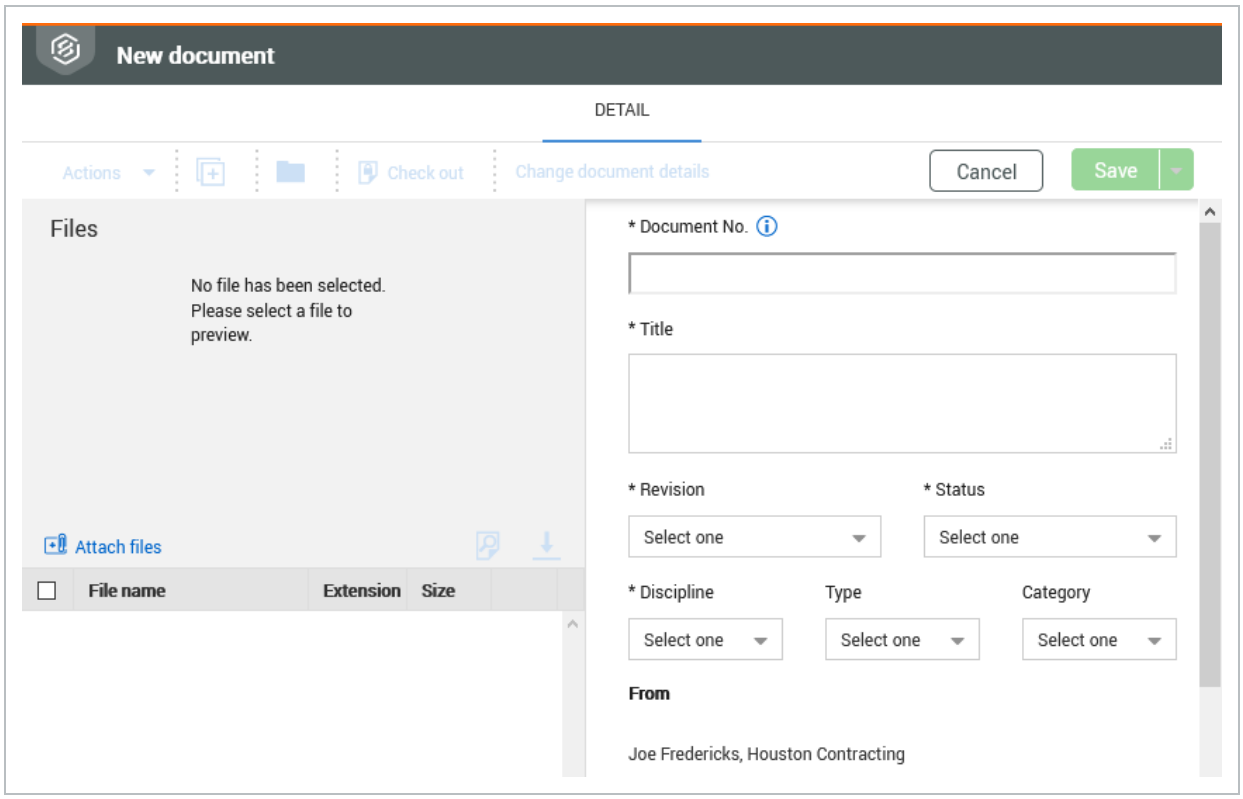
3.5.1 In Document register

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



3.5.2 In Tray icon area

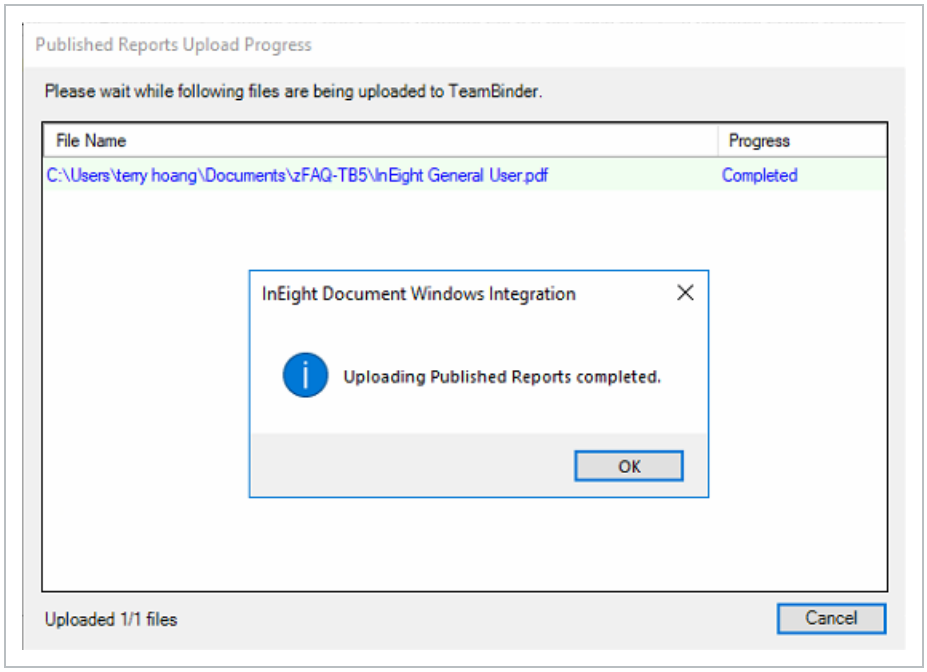
1. Right click on the InEight Document Drive Windows Explorer Integration.
2. Select **New** then **Document**.
3. Select project. This opens the Single Document upload screen in the web application where upload can be completed as normal.



3.6 MANAGING GALLERY AND PUBLISH REPORTS USING WINDOWS EXPLORER INTEGRATION

3.6.1 Uploading items using Document Drive

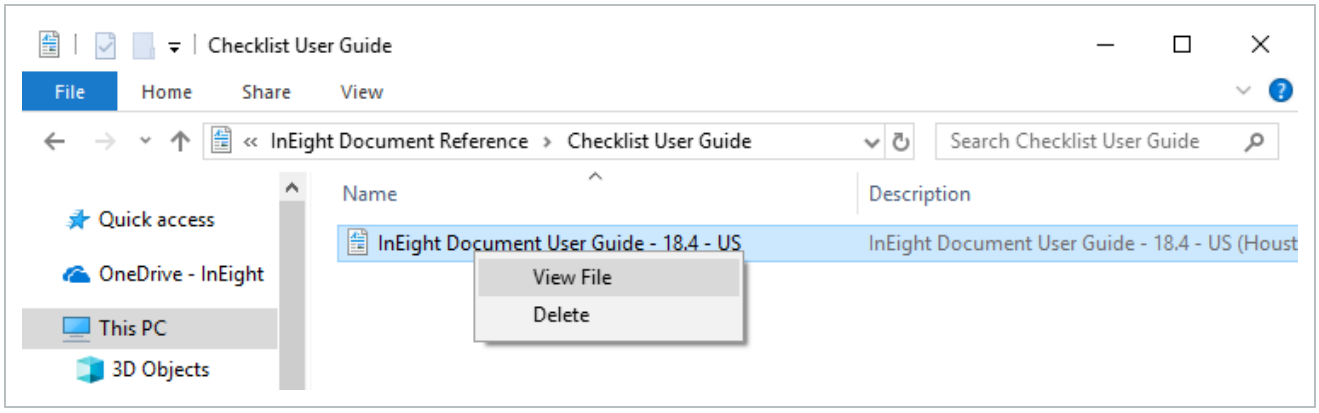
1. Items can be uploaded quickly and easily using the drag and drop method in both Gallery and Publish Reports.



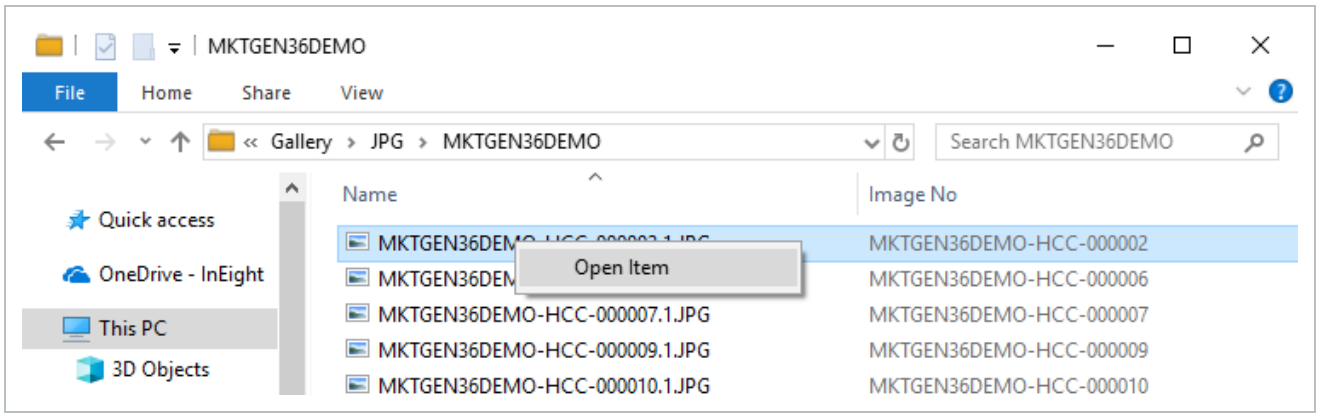
2. Upon completion, users receive a pop up message confirming items have been uploaded successfully.

3.6.2 Viewing files

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



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



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

3.6.3 Deleting Items

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

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

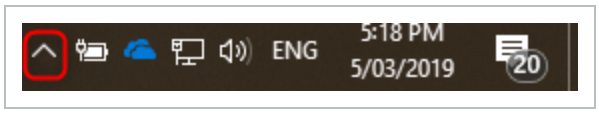
NOTE	It is not possible to delete existing images and videos from within Gallery folder.

3.7 WINDOWS EXPLORER INTEGRATION PREFERENCES

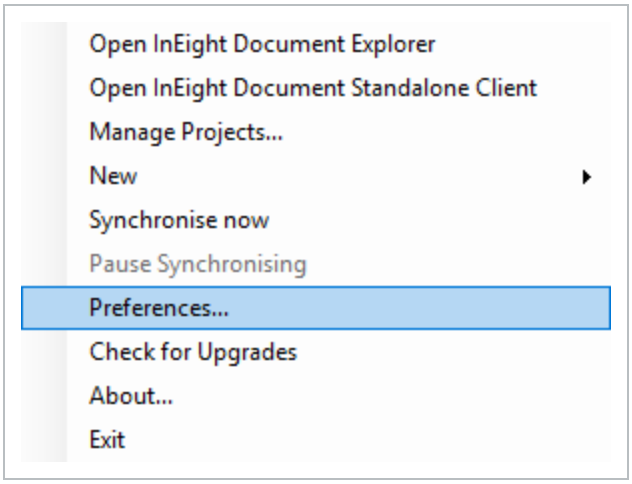
3.7.1 Accessing Windows Explorer Integration Preferences

To access Windows Explorer Integration Settings:

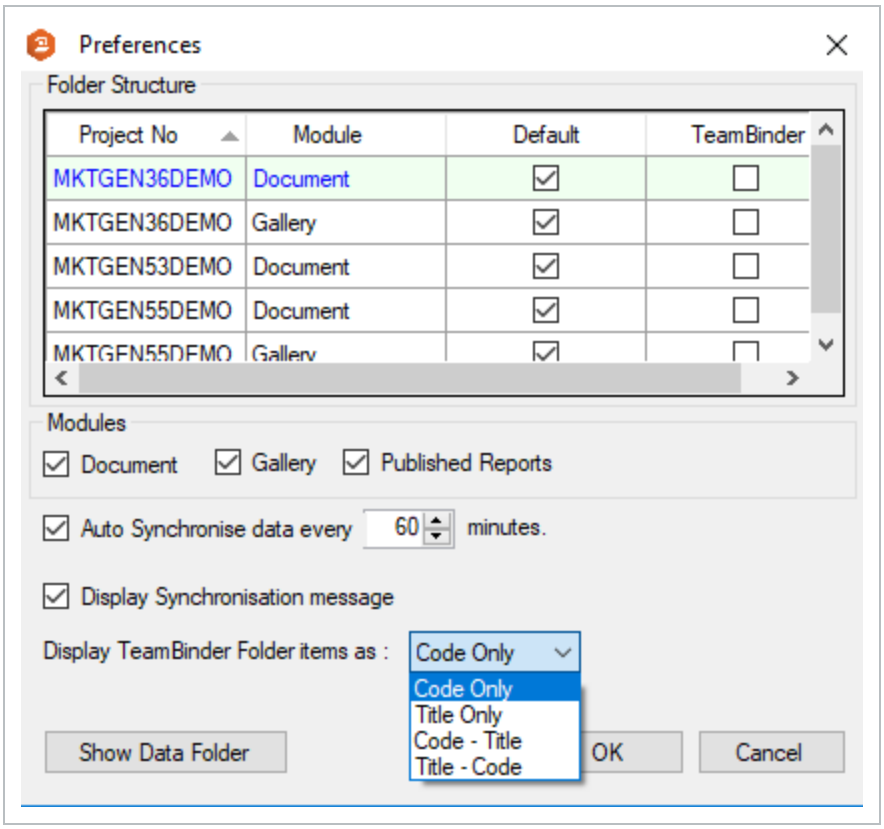
1. Locate the Drive Windows Explorer Integration icon in the system tray \ area.



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



3. This opens the Preferences window



3.7.2 Preference Options

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

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

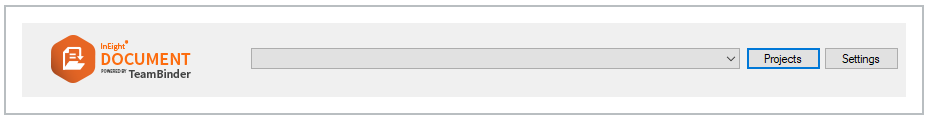
CHAPTER 4 – DOCUMENT DRIVE WINDOWS STANDALONE APPLICATION

For information on Document Drive Microsoft Windows Standalone Application, see the links below.

4.1 ADD / REMOVE PROJECTS

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

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



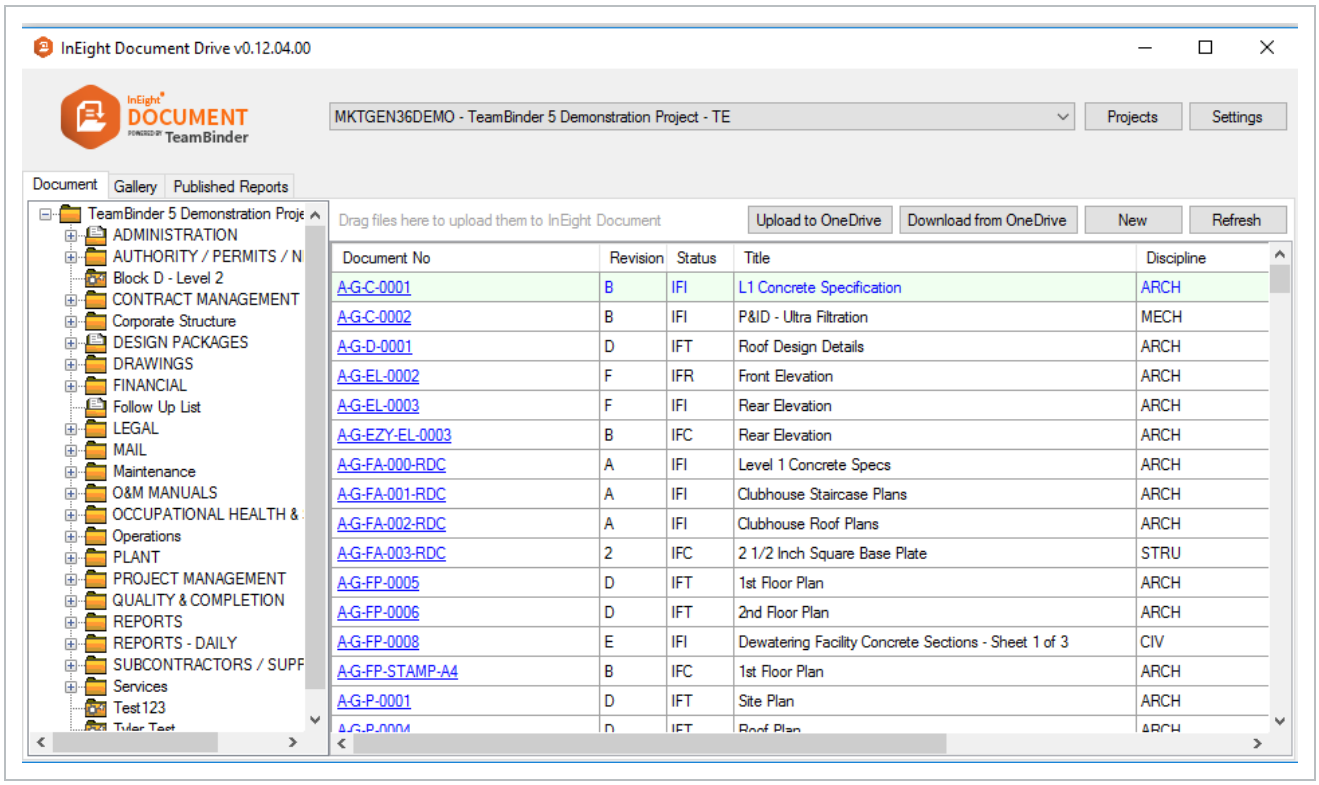
2. Projects can then be added or removed as per Windows Explorer Integration (refer to sections **3.1** and **3.2** for instructions).

4.2 INTRODUCTION TO THE INTERFACE

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

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

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

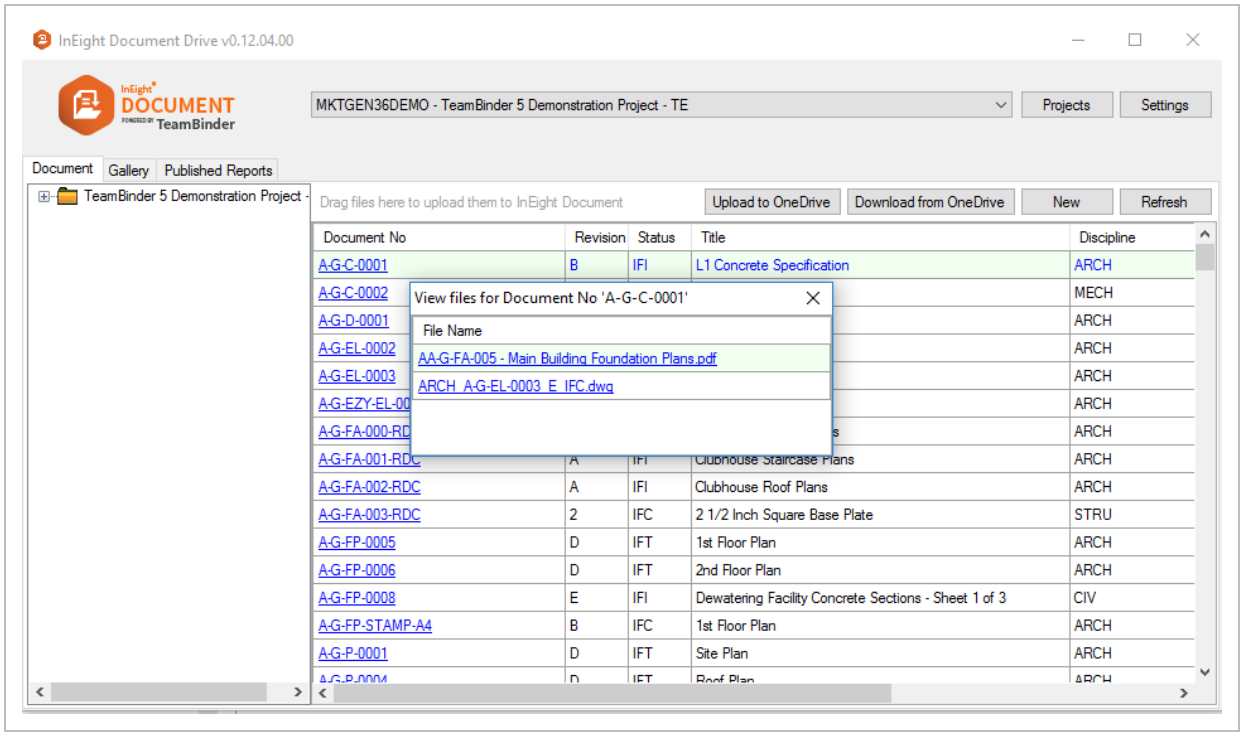


4.3 VIEWING DOCUMENTS WITHIN REGISTER

To view documents within the Windows application:

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

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



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

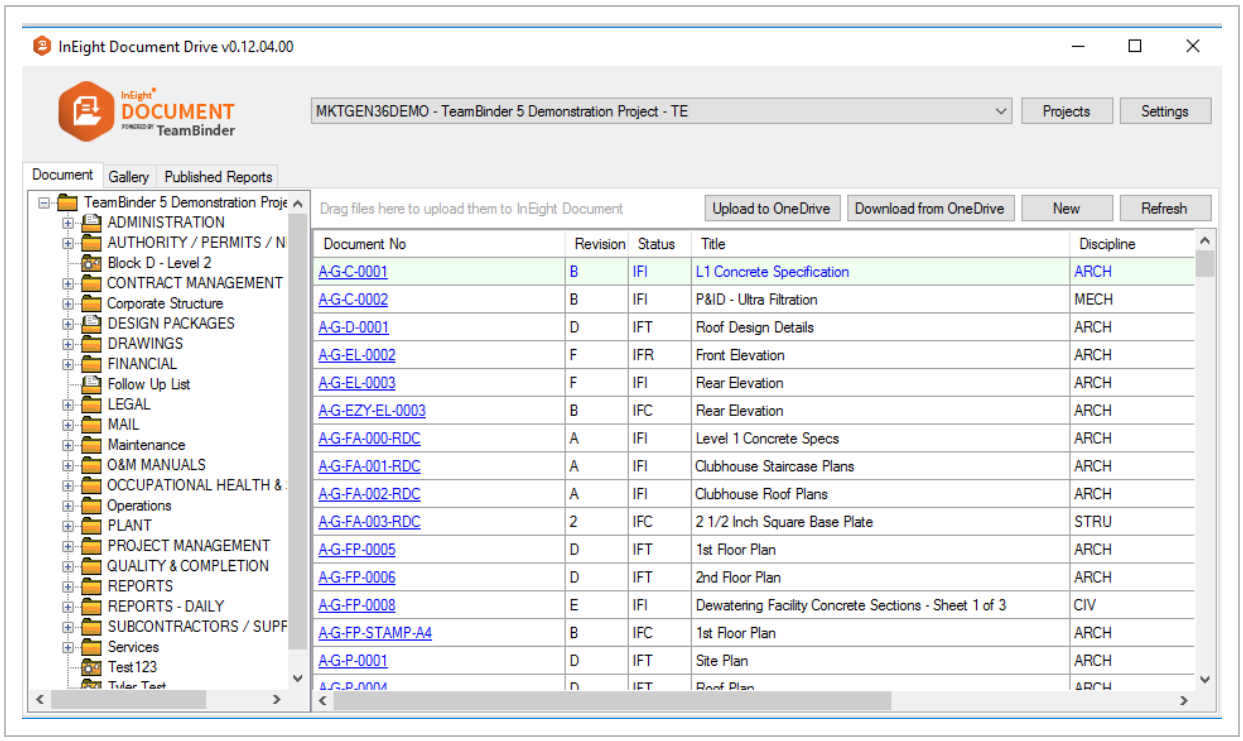
4.4 UPLOADING DOCUMENTS

4.4.1 Standard Single upload

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

4.4.2 Bulk upload

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



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

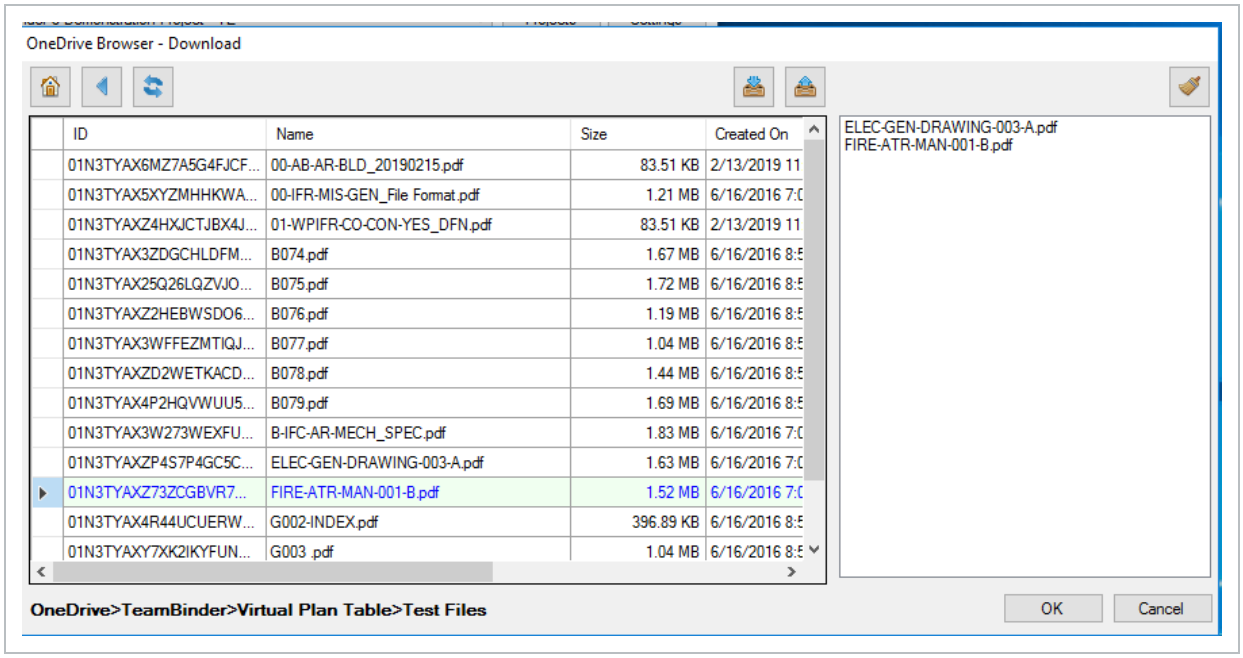
4.4.3 Downloading from Microsoft OneDrive

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

1. Click

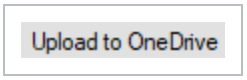
button.
2. Sign in Microsoft OneDrive.
3. OneDrive folder structure is displayed on the left-hand screen.
4. Double click on the folder to drill down.

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

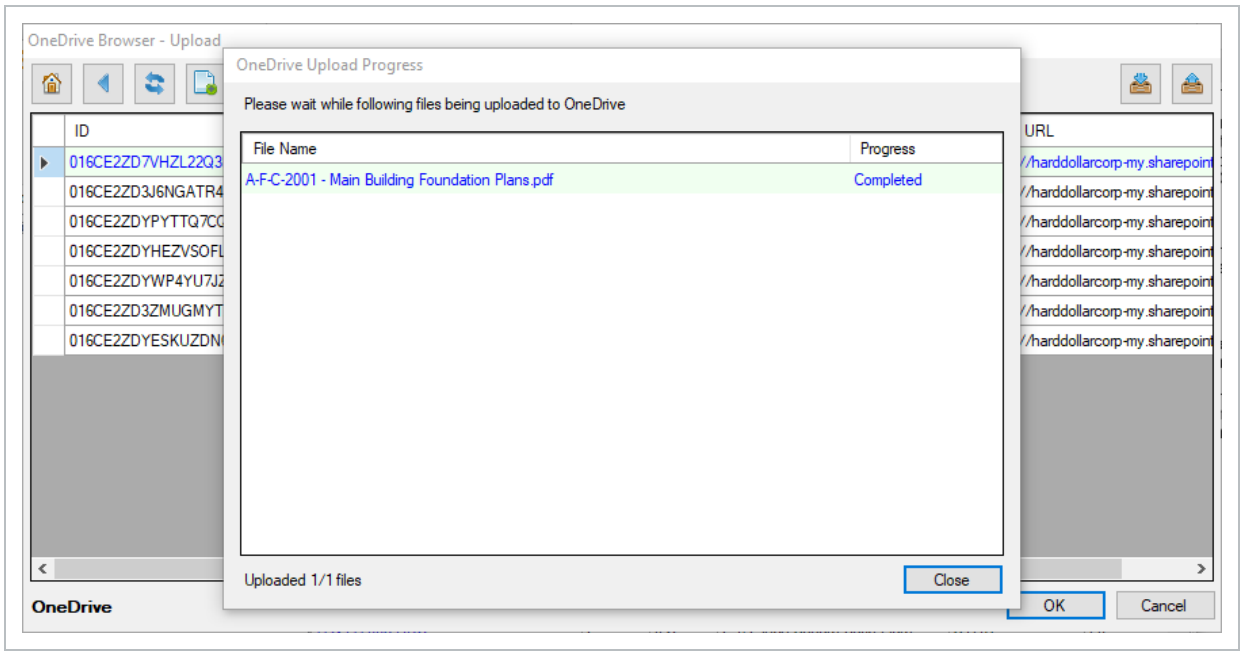


6. To remove items from the right-hand screen, double click on them and confirm removal.
7. Click **OK**.
8. Complete action in InEight Document Bulk Upload screen in the web application.

4.4.4 Uploading to Microsoft OneDrive

1. Select the document in the register.
2. Click 

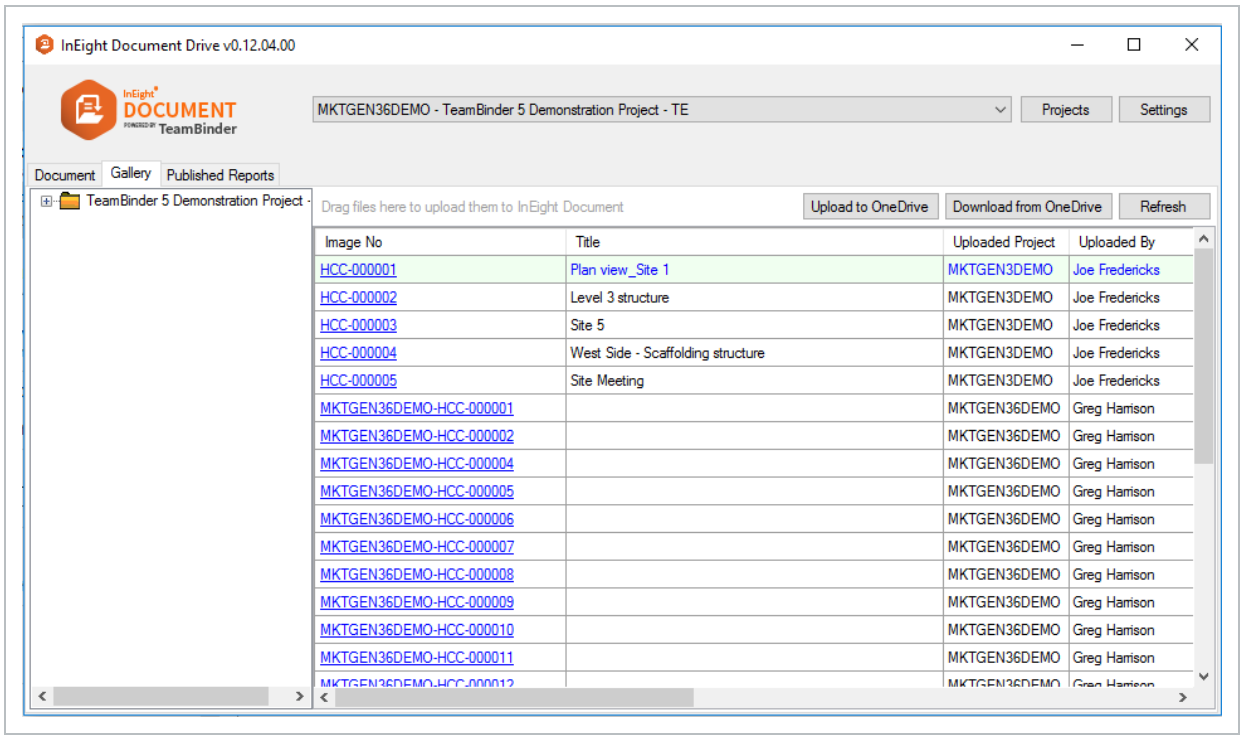
button.
3. Click **OK**.



4.5 MANAGING GALLERY VIA THE WINDOWS APPLICATION

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

- Dragging and dropping the files to the designated space.



- Using the

option.

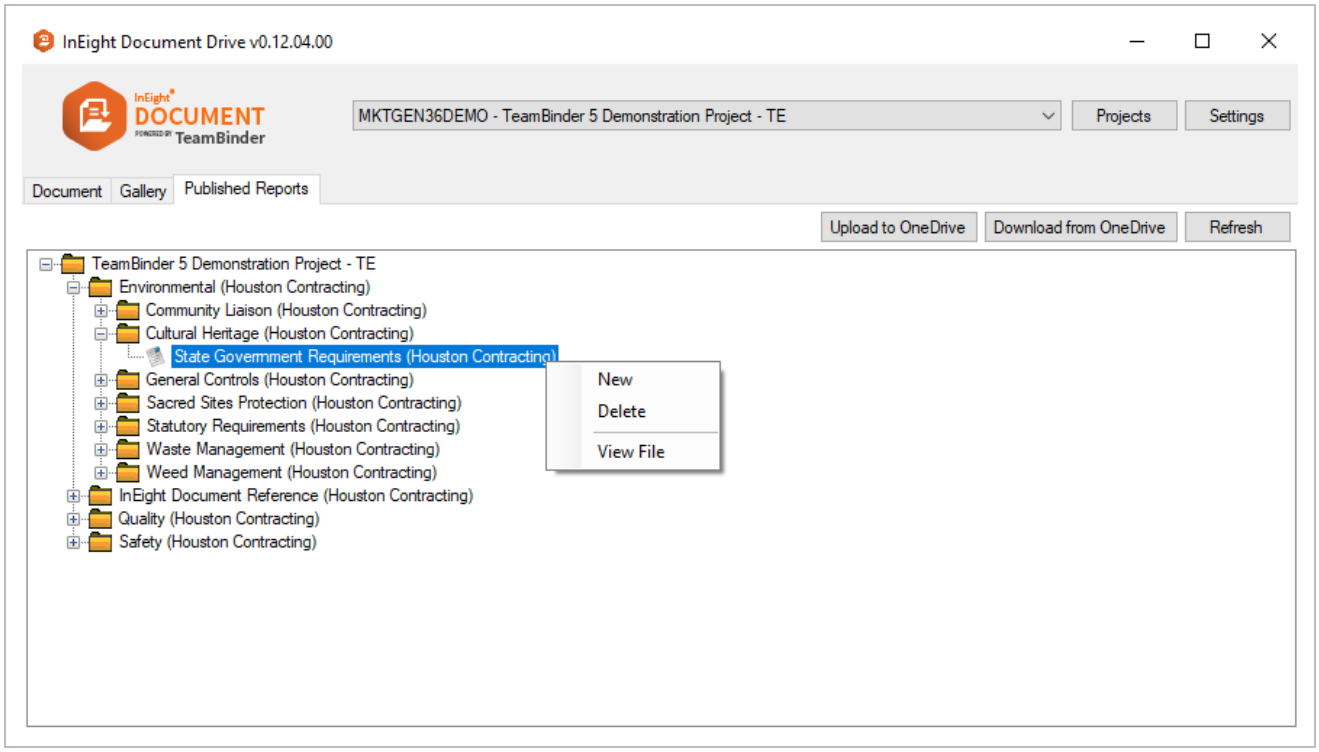
Items can be viewed by selecting the hyperlink in the “Image No” column to open the item in the default native application.

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

NOTE	Items cannot be deleted from the Gallery tab.

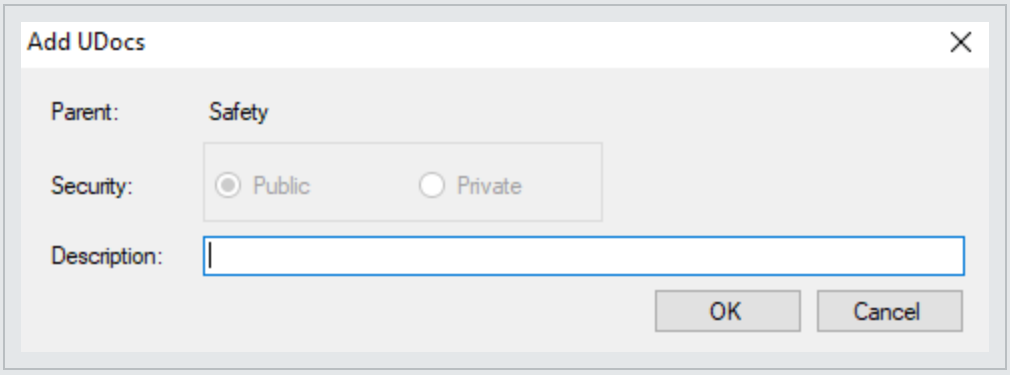
4.6 MANAGING PUBLISHED REPORTS VIA THE WINDOWS APPLICATION

4.6.1 Files can be uploaded from OneDrive by using the Download from OneDrive option;



NOTE

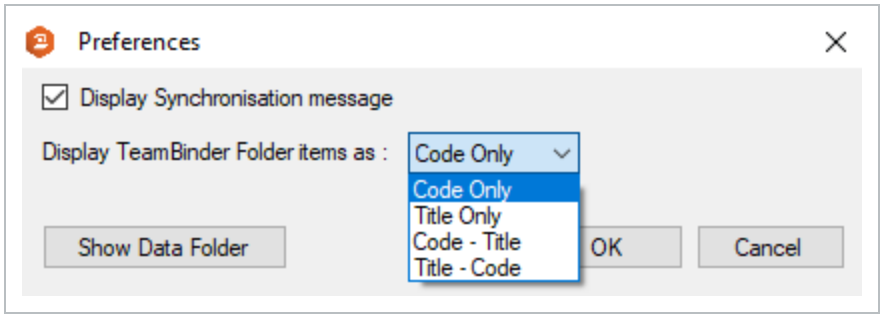
- A new folder can be added by right clicking on a folder and select **New**.



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

LESSON 4 – WINDOWS STANDALONE APPLICATION SETTINGS

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



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