MAIL USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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CHAPTER 1 – USING THE MAIL REGISTER

The **InEight Document (DOC) Mail module** controls the process of sending and receiving mail and communications between project participants.

The typical process for sending and receiving InEight Mail is:

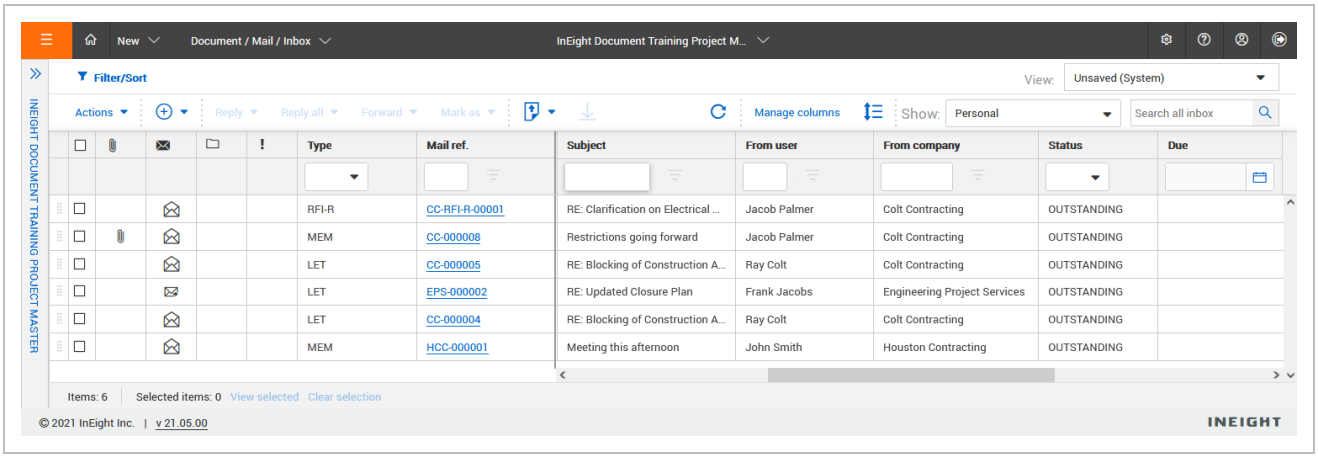
1. Users create and send outgoing mail using the Mail module.
2. Recipients within InEight Document receive a notification via their corporate email system with a hyperlink to the mail.
3. Recipients who are registered as external contacts receive a copy of the mail.
4. InEight users read and respond to received mail within InEight Document.
5. External contacts reply using their corporate email system. This mail comes back into InEight via the DOC unregistered mail folder.

InEight also provides an Outlook Integration tool if you prefer to access your InEight Document Mail using Microsoft Outlook.

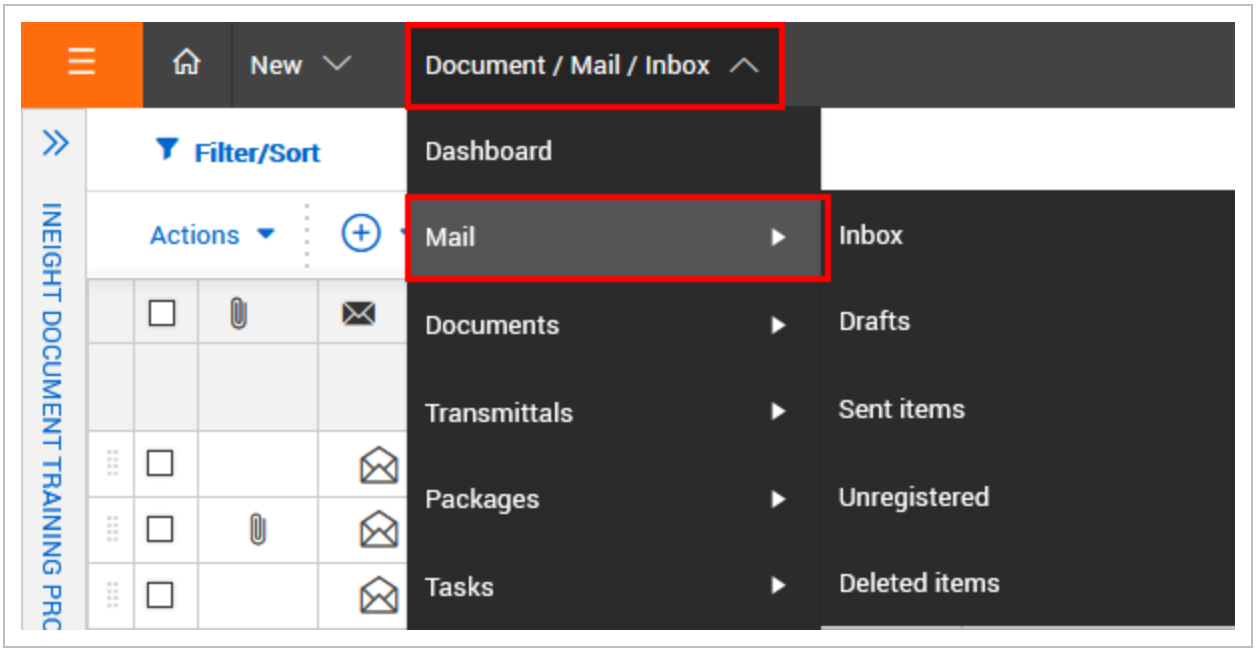
For more information on using the Mail Register, see the links below.

1.1 VIEWING THE MAIL REGISTER

The Mail Register contains all mail related to a project.



The Mail Register includes an **Inbox**, **Sent Mail**, **Drafts**, **Deleted items** and **Unregistered Mail** folders. If you have access to these mailboxes, they can be found by selecting the Mail module.



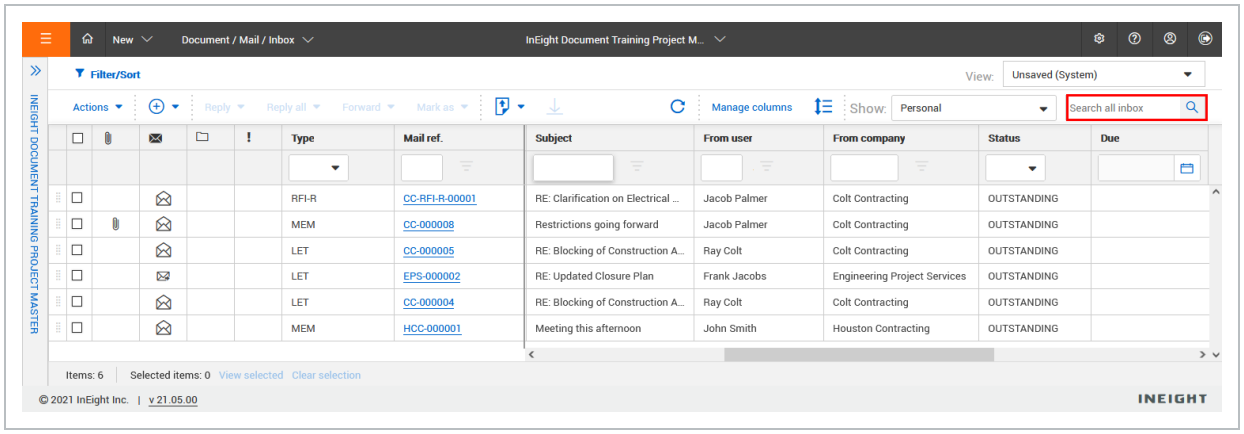
NOTE

- Mail can be sorted by clicking on column headers or using the column filters. You can also search for mail using the search box above the Register.
- Click the mail reference number or double click the row to open, read or respond to mail.
- Select mail in the Register and click **Actions** for more options.
- To copy text from a single cell in any register, right-click in the cell and then select **Copy text** to add the cell contents to the clipboard.

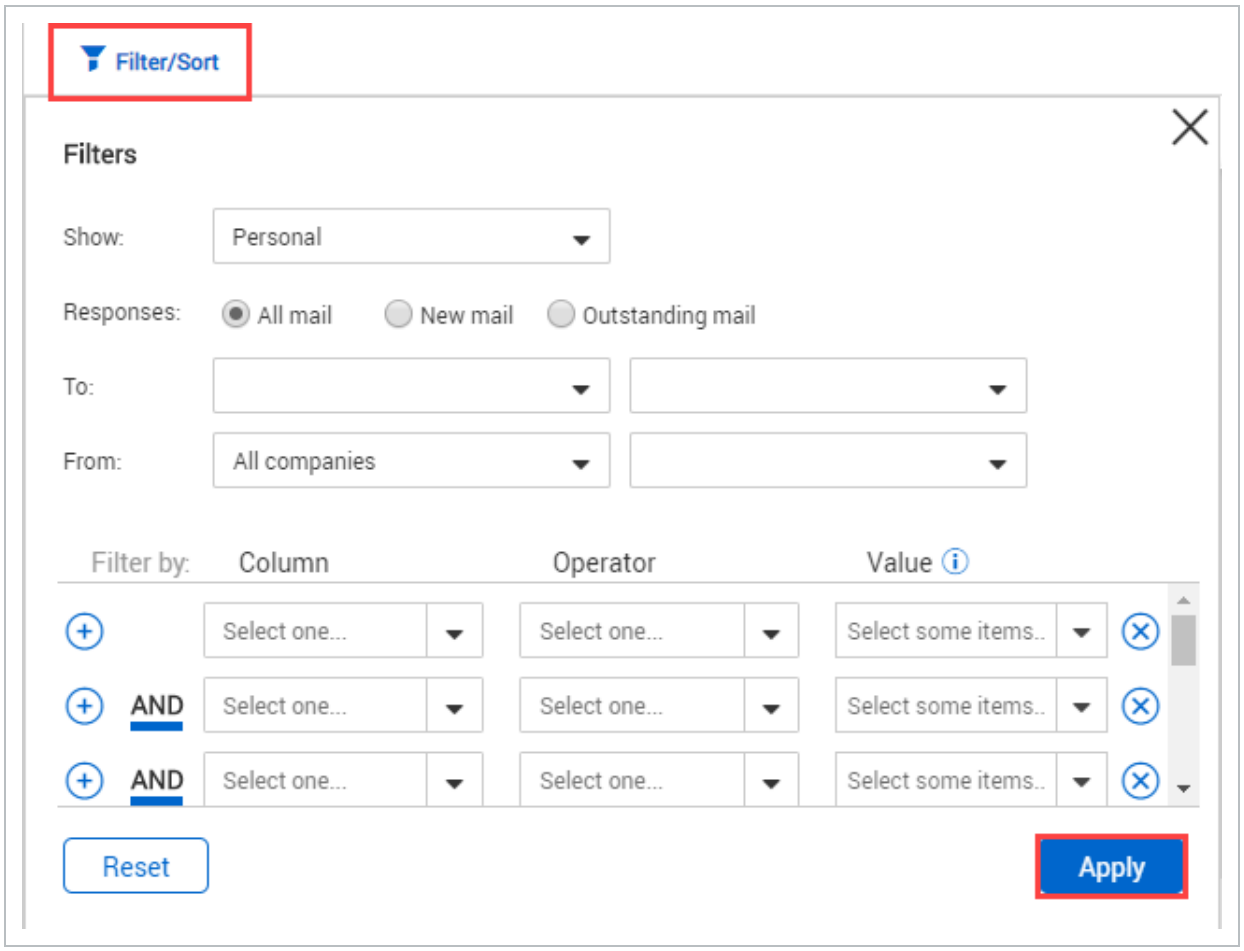
1.2 SEARCHING FOR MAIL

There are three ways to search for mail in the Mail Register.

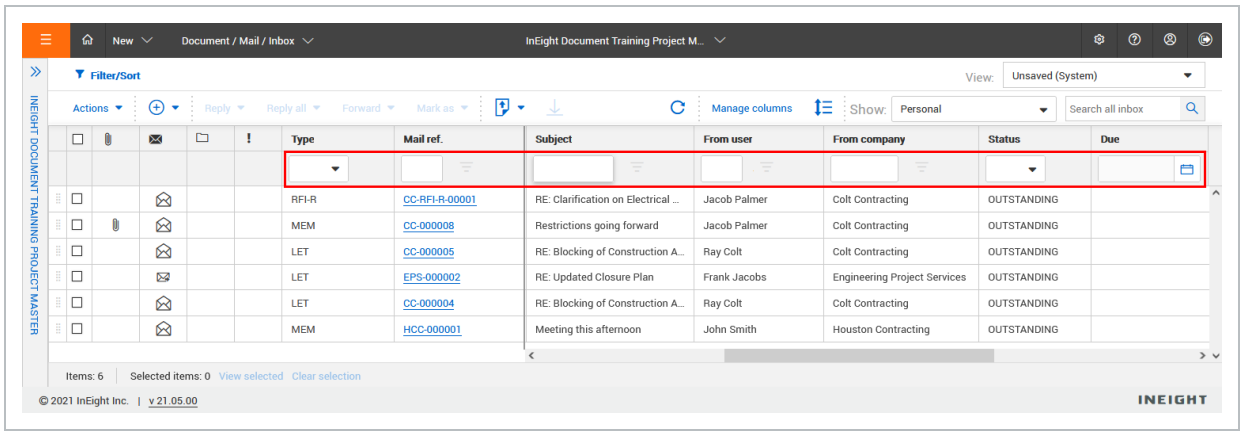
1. **Simple search** – Enter key words in the search box above the Register. The Register will display mail containing those key words.



2. **Filter and sort** – Click **Filter/Sort** to select filters for your search. Click **Apply** to apply the search filters.

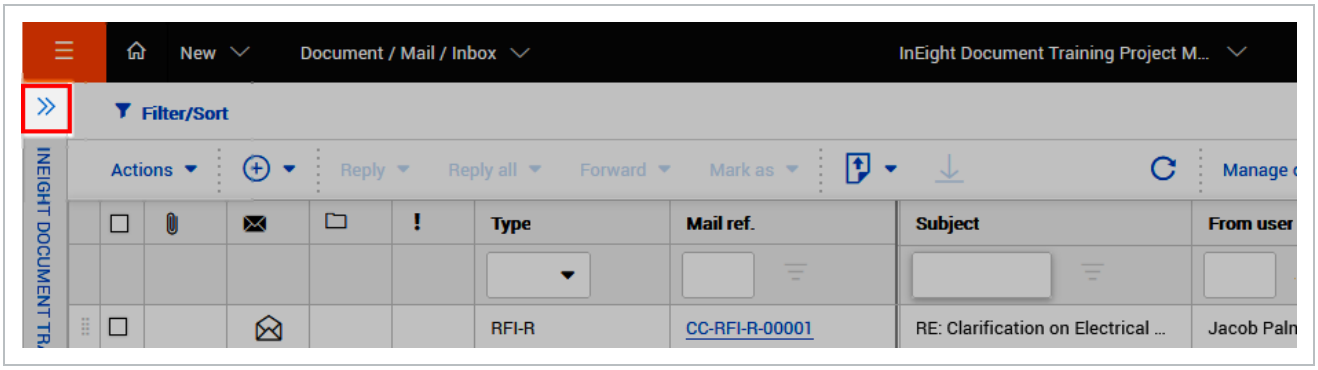


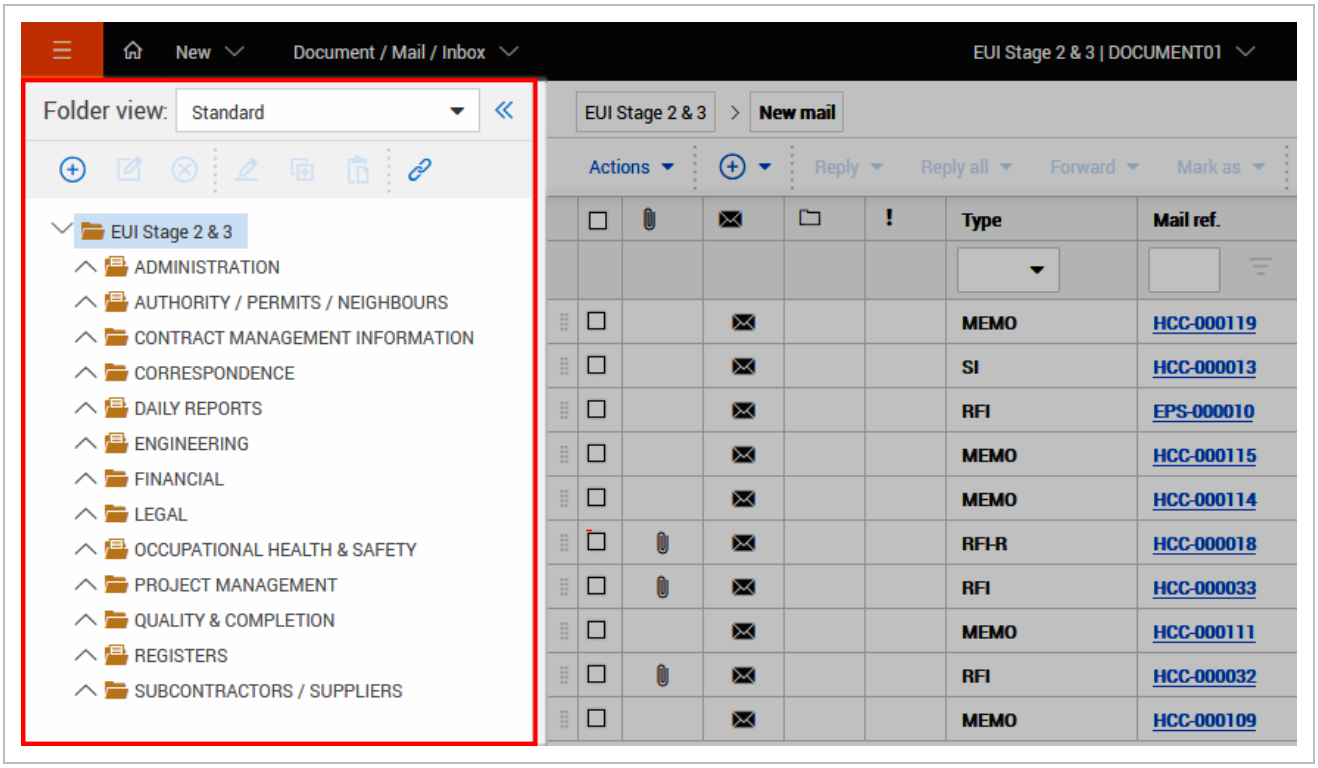
3. **Column filters** – Enter key words into the columns above the Register or select the drop-down lists to apply filters to that column.



1.3 USING MAIL FOLDERS

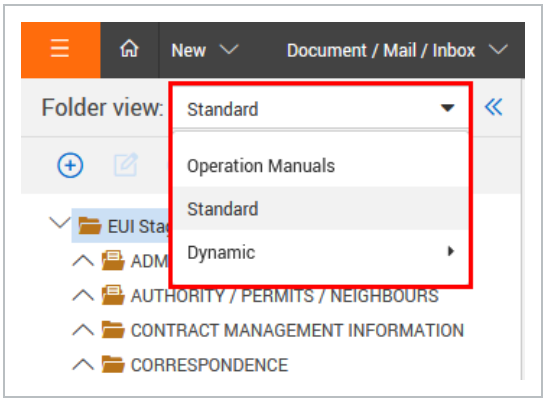
Allocate mail items into folders to make them easier to sort. To view mail folders, click the **arrow icon** to expand the folders section.





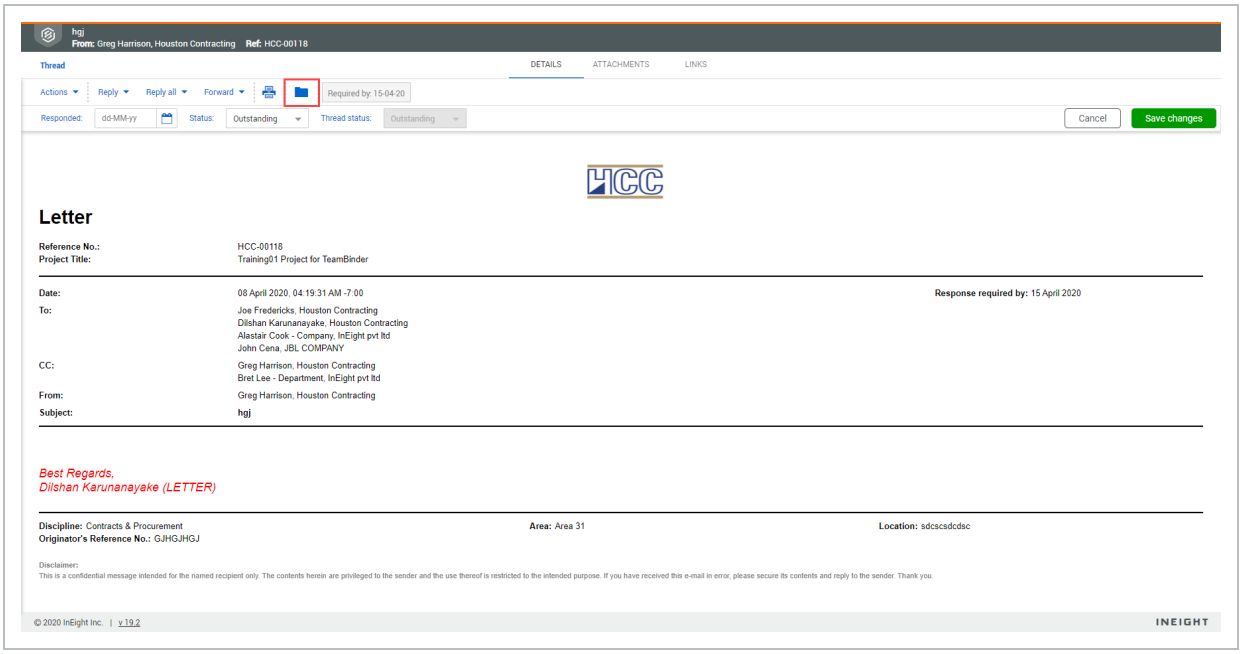
Smart Folders can automatically file mail or other data based on folder rules.

Dynamic Folders can automatically create folders and file mail based on mail fields (metadata). Swap between folder types by using the **Folder view** drop-down menu.

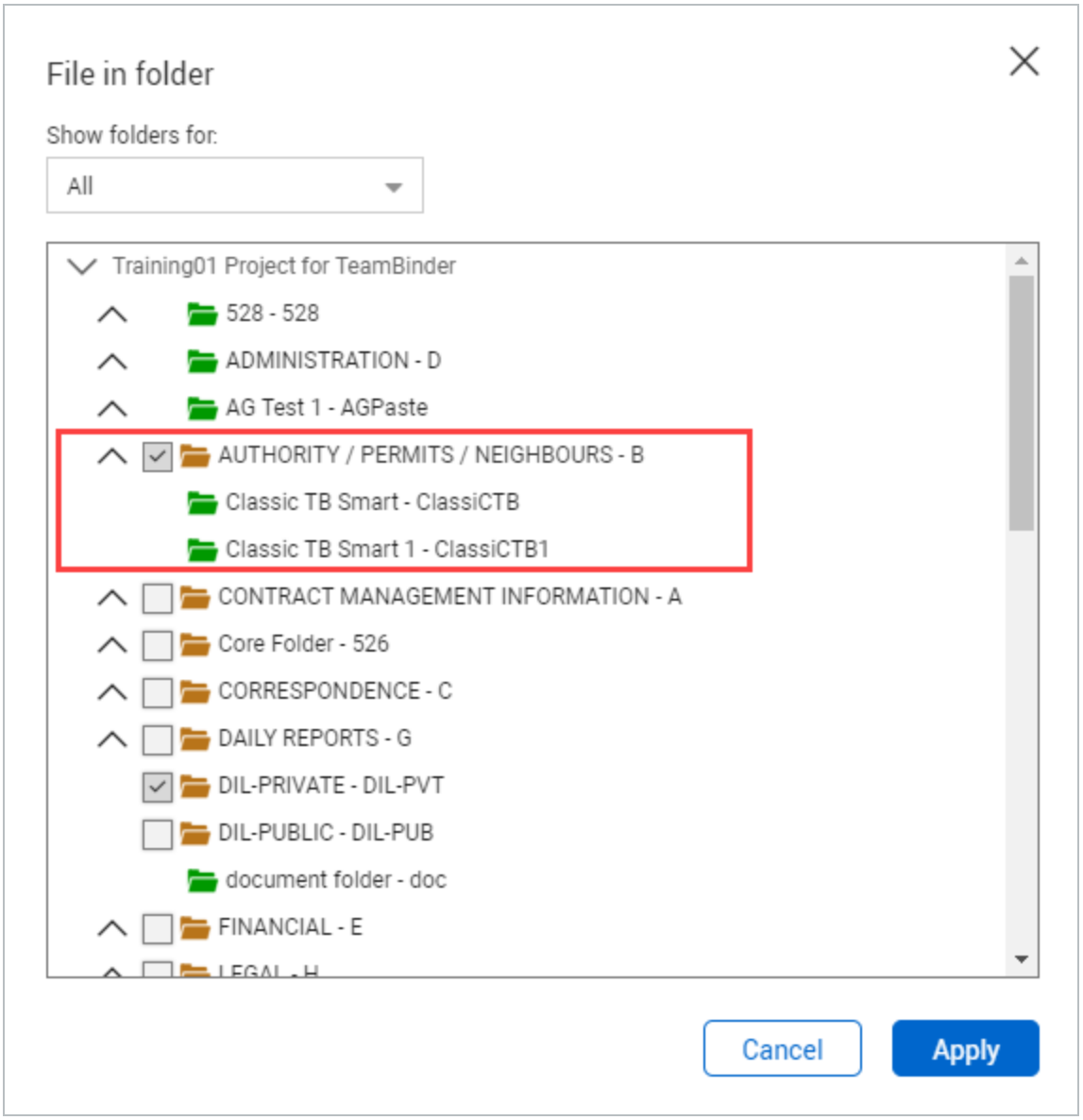


1.3.1 To file mail into folders:

1. Open the mail item.
2. Click the **folder icon**.



3. Select the folder.



4. Click **Apply**.

NOTE

- Mail Items can be filed and viewed in multiple folders. However, there is only ever one copy of the mail in InEight Document.
- Mail items that have been filed in one or more folders have a **folder icon** displayed in the Register.

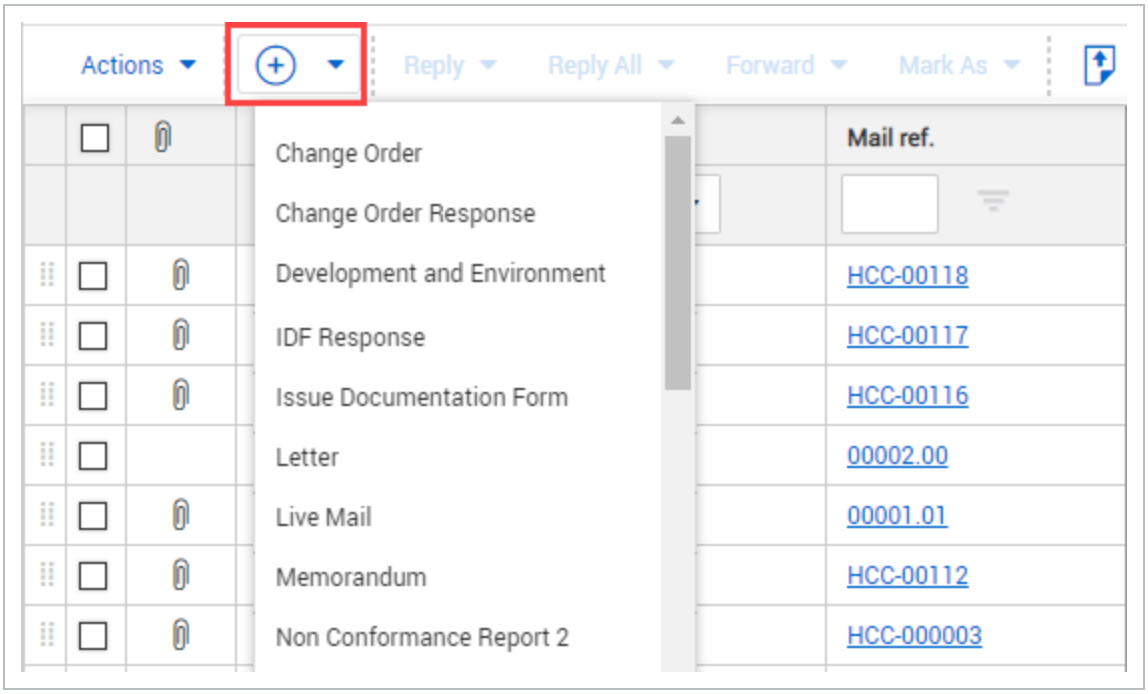
1.4 CREATING AND SENDING MAIL

You can create and send new mail directly from the Mail Register.

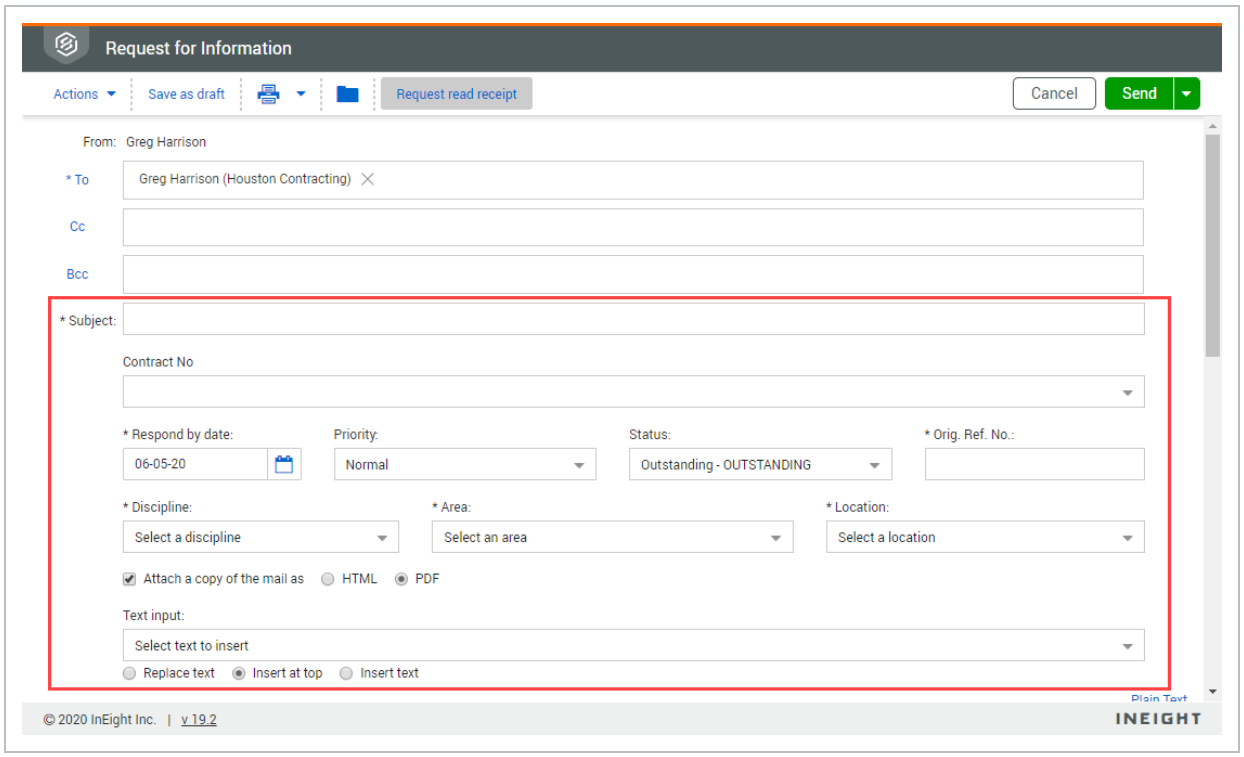
1.4 Step by Step 1 — Create new mail

Summary: Create new mail to communicate with other project participants.

1. Click the **Add icon**, and then select the type of mail.

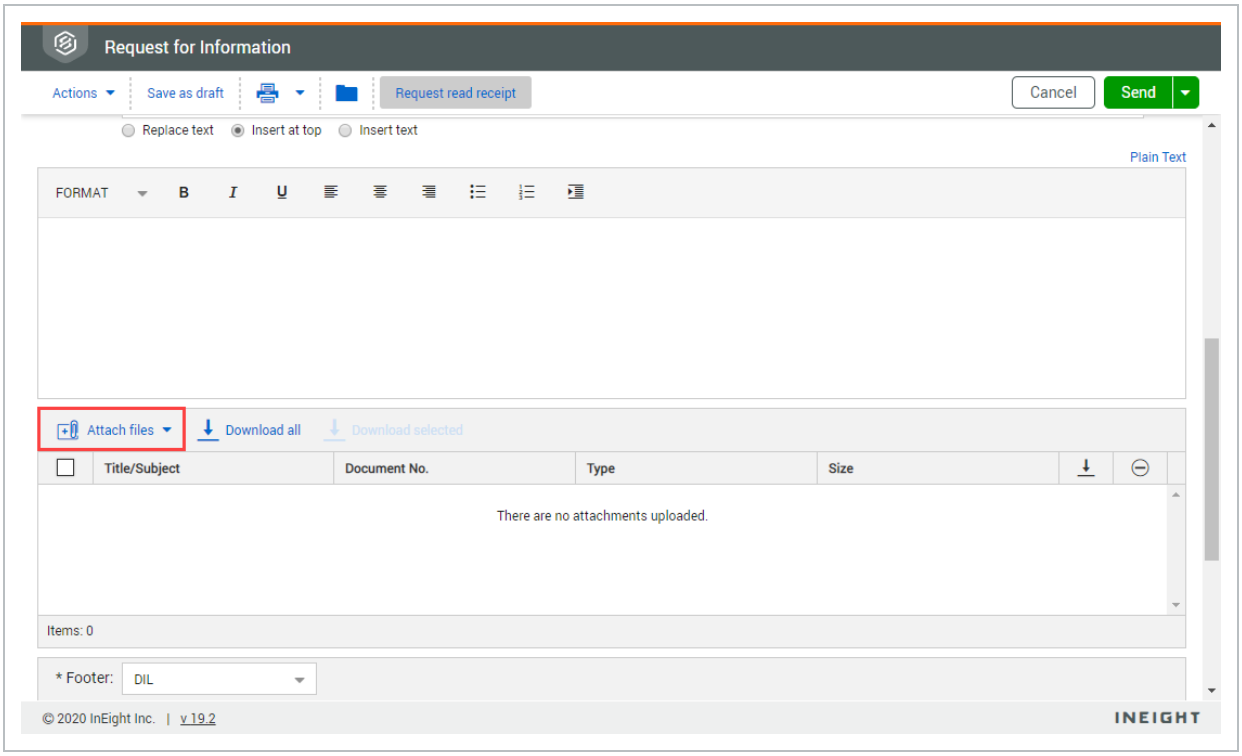


2. Enter the mail details.



- To use a custom footer, scroll down and select a custom footer from the drop-down menu.
- To make internal notes about the mail, scroll down and enter information into the **Action note** and **Response** fields.
- Attach a PDF or HTML copy of the mail by selecting the check box above the message field.

3. Enter a message in the message field.
4. Click **Attach files** to upload files.



5. If you are not ready to send the mail you can select **Save as draft** to save the mail as a draft. If the Assign a reference number when saving a draft project setting is selected, Document assigns a reference number. If the setting is unselected, draft mails are assigned a temporary reference number in the format DRAFT-COMPANYID-AUTOSEQUENCE. This number is replaced with the actual mail reference number when the mail is sent. You can click the **arrow** next to **Save** to choose from additional options, send and close out the mail or send it for review.
6. Click **Send** in the top right corner. The sent mail is shown in the Mail Sent items register. If the mail is large, and processing takes place in the background, a processing icon shows to the left of the item in the register. When processing is complete, a check mark icon shows. If the process was unsuccessful, an exclamation point shows.

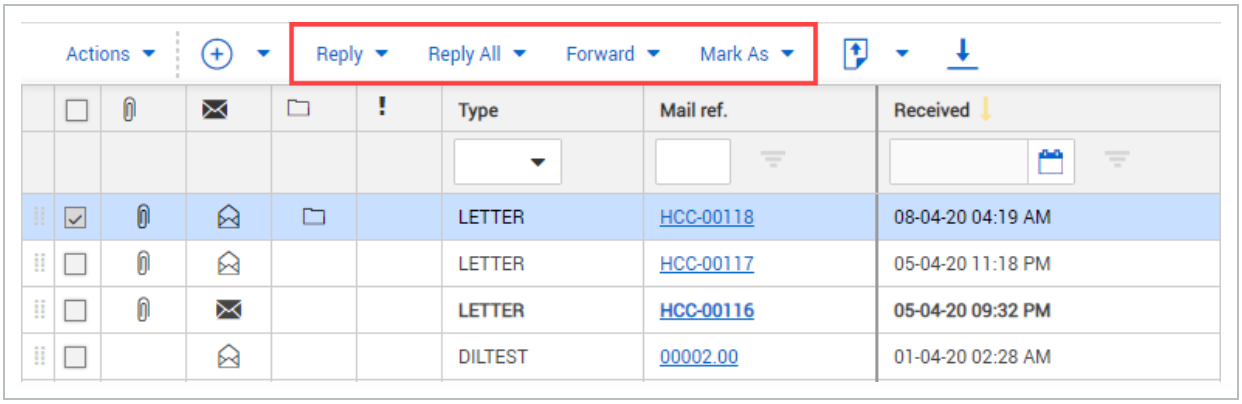
What's next: Click the **Print** icon and select **Print preview** to preview the mail. Click the **Folder** icon to file the mail in a folder.

1.5 RESPONDING TO MAIL

You can respond to mail directly from the Mail Register or from within the mail itself.

1.5.1 To respond to mail from the Register:

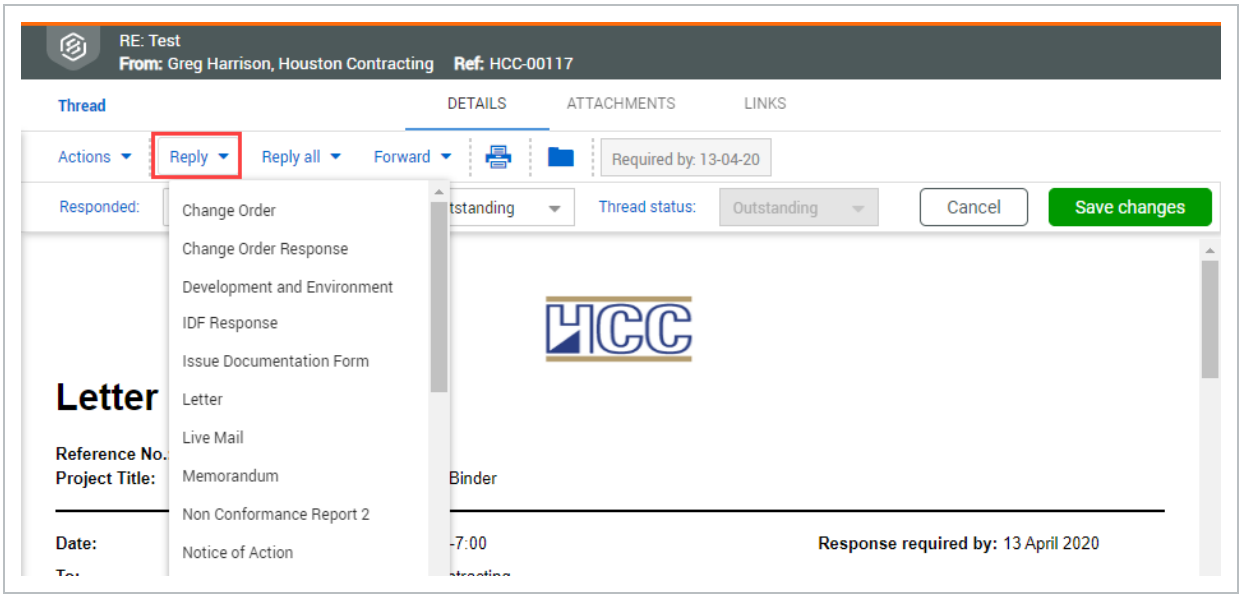
1. Select the mail to enable more options.



2. Click **Reply** and select the mail type.
3. Enter in the message details.
4. Click **Send**.

1.5.2 To respond to mail within the mail item:

1. Open the mail.
2. Click **Reply** and select the mail type.



3. Enter in the message details
4. Click **Send**.

NOTE

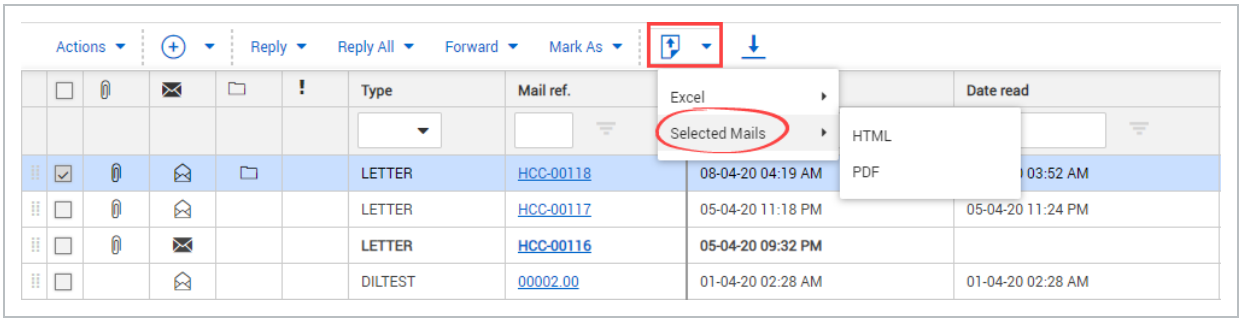
- After selecting mail in the Register, you can also select:
  - **Reply All**: Reply to all recipients.
  - **Forward:** Forward the mail to more recipients.
  - **Mark As**: Mark the mail as read or unread.
- Replies and forwards are automatically linked to the mail.

1.6 EXPORTING MAIL TO HTML OR PDF

Mail items stored in the **Inbox**, **Sent Items** or **Drafts** folders can be exported to HTML or PDF format in a single zip file.

1.6.1 To export mail items:

1. Select the mail items in the Register.
2. Click the **export icon**.
3. In the **Selected Mail** menu, select **HTML** or **PDF**.



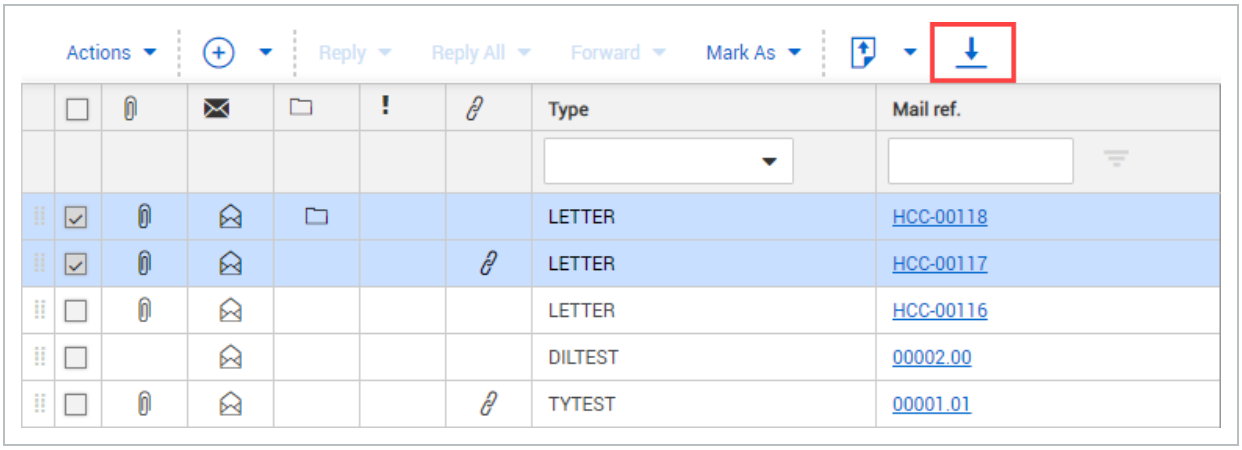
4. Click **Download**.

1.7 DOWNLOADING MAIL ATTACHMENTS

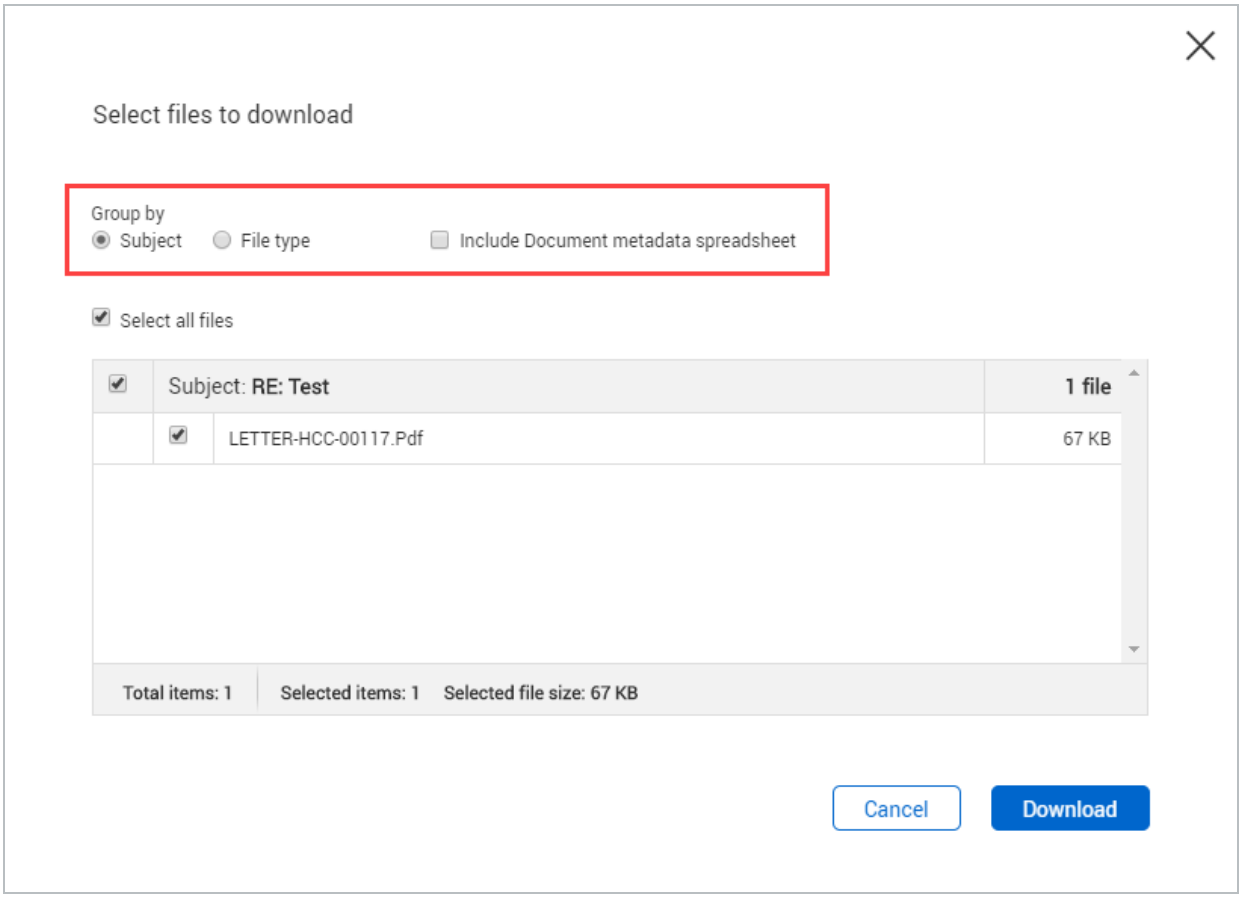
You can download mail attachments directly from the Mail Register.

1.7.1 To download mail attachments

1. Select the mail items.
2. Click the **download icon**.



3. Select whether to group mail attachments by subject or file type.



4. Select whether to include the document metadata spreadsheet.
5. Click **Download**.

1.8 OPEN A MAIL ATTACHMENT PREVIEW

When you want to quickly view a mail attachment without having to download it, you can view a preview from the Attachments tab of the mail item. The preview opens in a new window.

The preview window includes tools for viewing and downloading the document similar to the viewer or PDF viewer. The entire attachment is shown in the preview.

The following image shows the preview window for a PDF document.

	Item	Description
1	File names	A drop-down list of all files attached to the mail item. The full list of files shows regardless of the items selected.
2	Viewing tools	Tools to enhance viewing. These are the same tools as the applicable viewer.
3	Download icon	Lets you download the file to your computer.
4	Page indicator	Indicates the page number in the file.
5	Close button	Closes the preview window.

1.8 Step by Step 1 — Preview a mail attachment

Summary: Preview a mail attachment when you want to quickly see the attachment contents without downloading it.

Considerations: The preview lets you view the file only. If you want access to mark up or comment tools, you must download the attachment and open it in the applicable viewer. All files in the attachment are added to the preview regardless of the View icon clicked or the items selected.

Quick steps:

1. From your Mail inbox, click the **Mail reference** number. The Mail Details page opens.
2. Go to the Attachments page, and then click the **View** icon for the file you want to view. The file is shown in the viewer.
3. Use the viewing tools to view the file.
4. Optionally, click the **Download** icon to download the file to your computer.

What's next: If you want to look at other files in the attachment, you can expand the File names drop-down menu, and then select the file name. After you have viewed the files, click **Close** to close the preview window.

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CHAPTER 2 – MANAGING MAIL

There are some key functionalities you can use to manage mail in the Mail Register.

For more information on how to manage mail, see the links below.

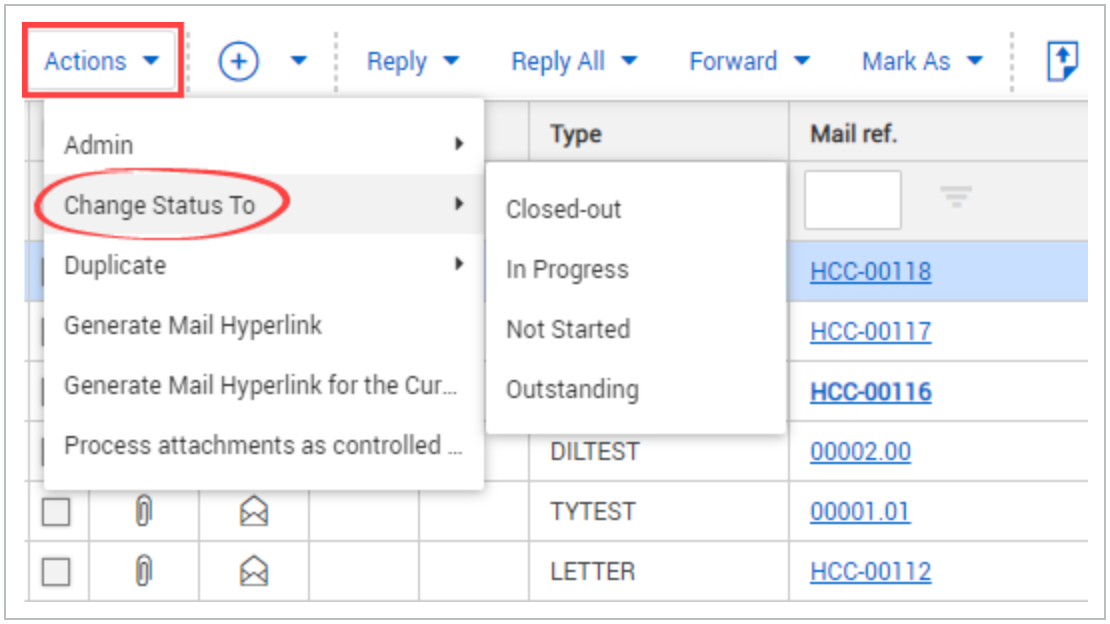
InEight also provides an Outlook Integration tool if you prefer to access your InEight Document Mail using Microsoft Outlook.

2.1 CHANGING MAIL STATUS

Every mail item has a status. Filter mail by status to see which items require action from you or a recipient. Manage resolved mail items by changing their status to closed out. You can also automatically set mail items to be given an automatic status in user preferences.

2.1.1 To change mail status in the Mail Register:

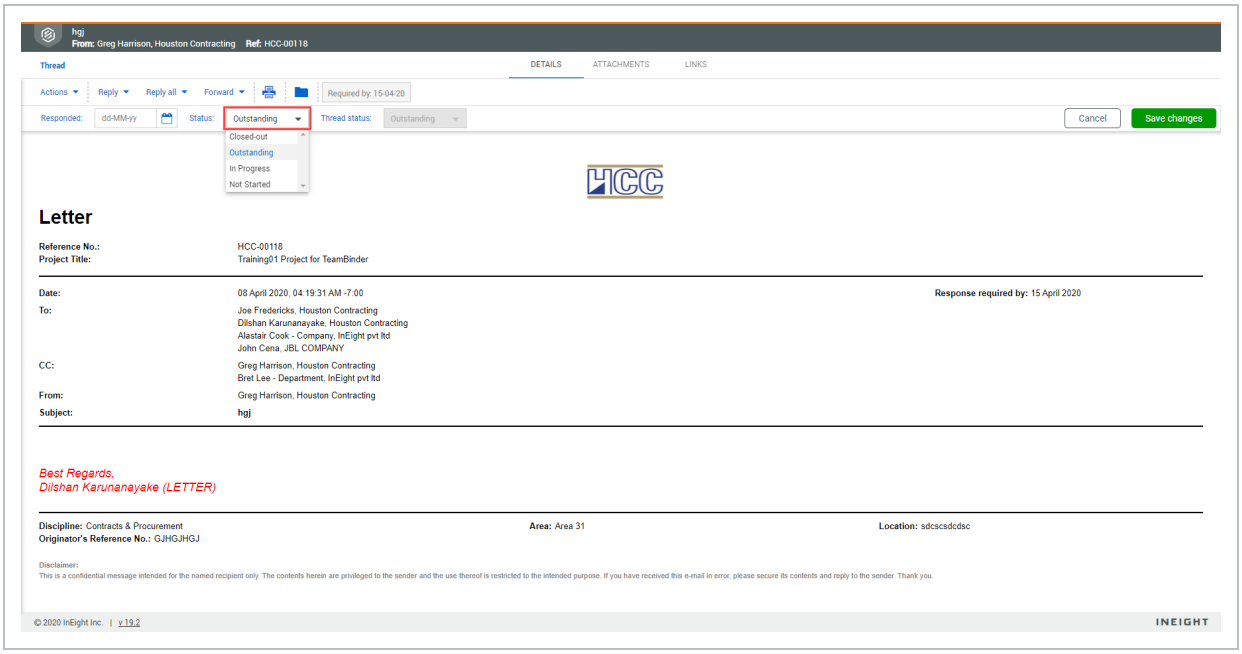
1. Select the mail and click **Actions**.
2. In the **Change status to** menu, select the new status.



3. Click **Yes**.

2.1.2 To change mail status in the mail:

1. Open the mail.
2. Select the new status from the drop-down menu.



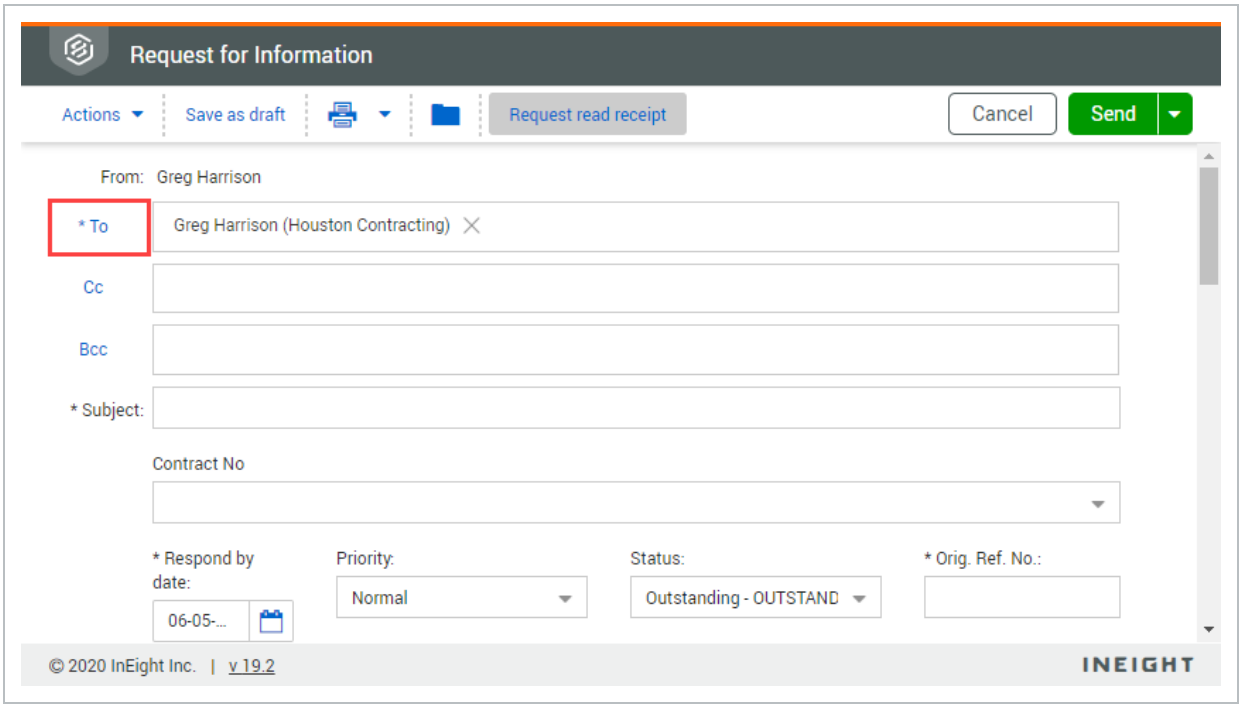
3. Click **Save changes**.

2.2 ADDING CONTACTS

You can add contacts from different companies in the **To** field of mail.

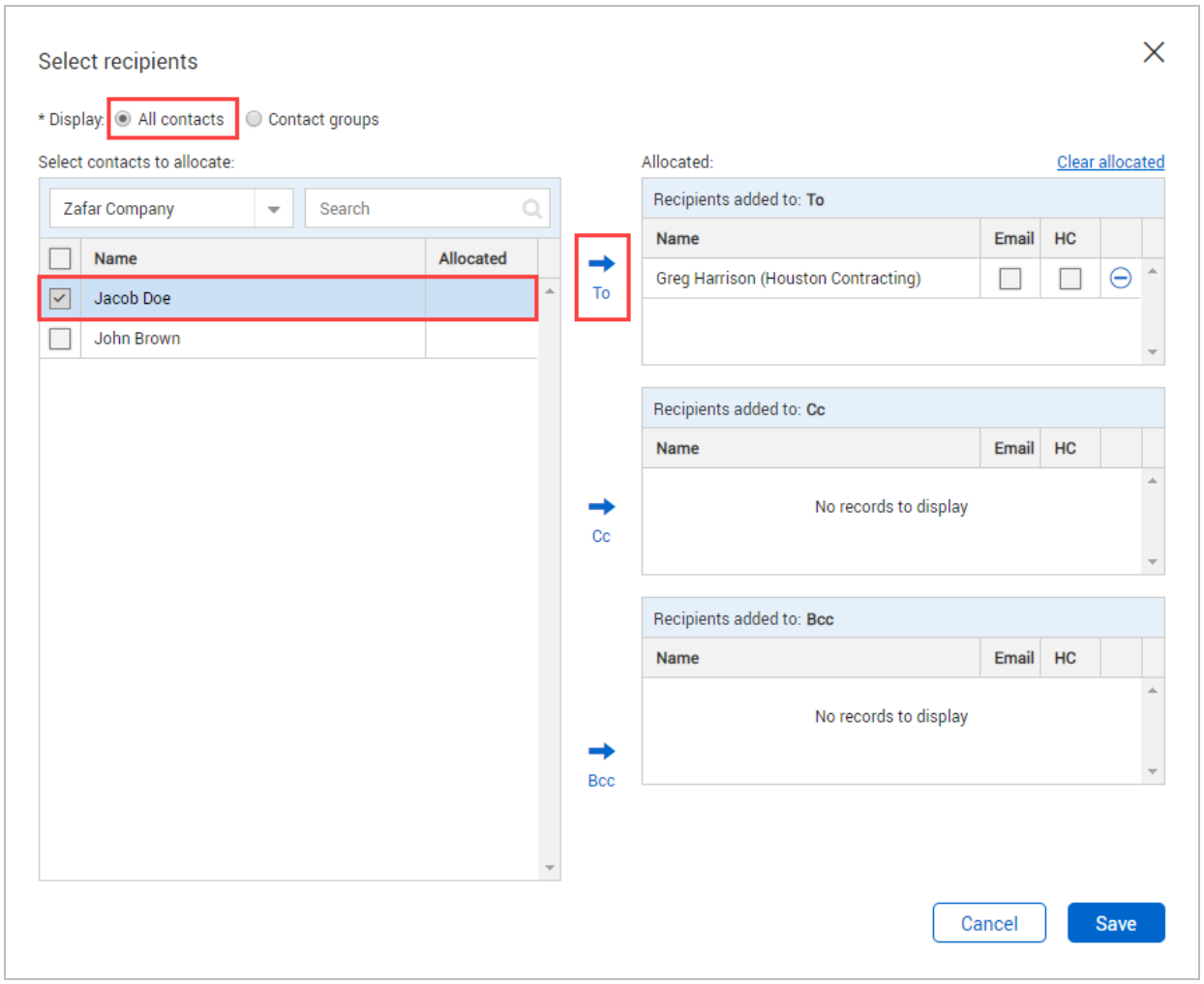
2.2.1 To add a contact:

1. Open the mail compose screen.
2. Click **To**.



3. Select the company from the drop-down menu.

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



5. Click **Save**

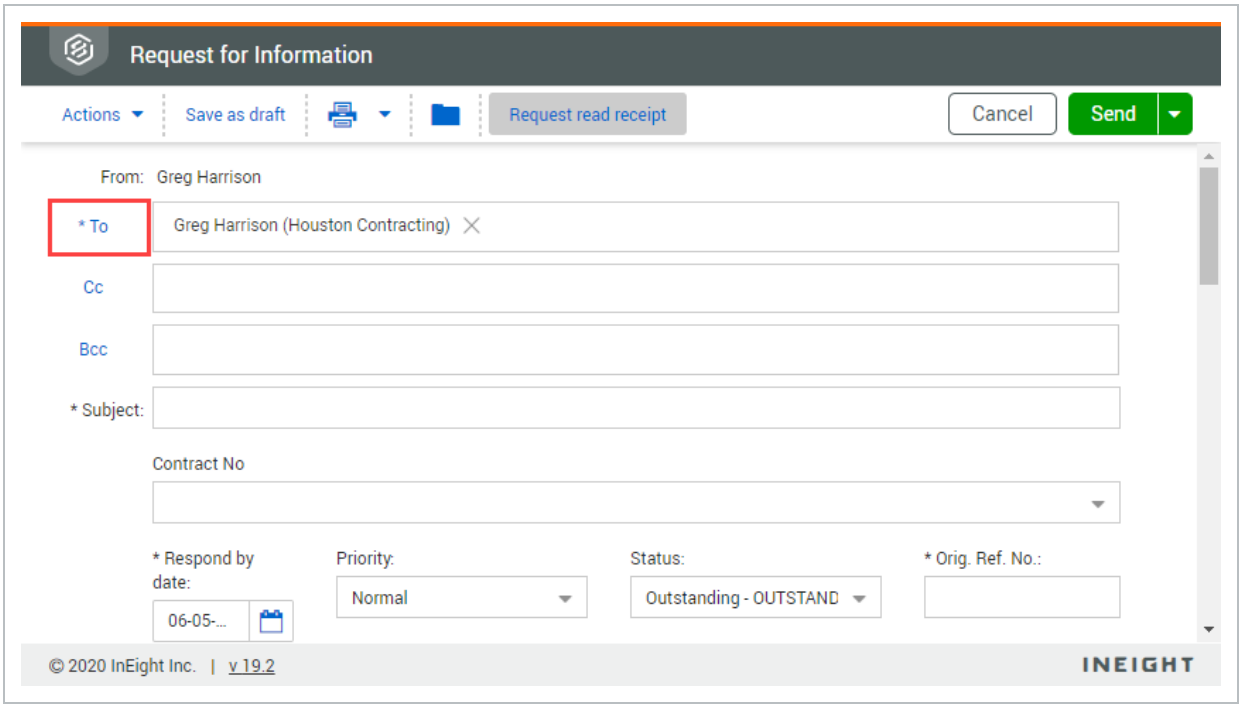
NOTE You can also add contacts to the Cc and Bcc fields using the **arrow icons**.

2.3 USING CONTACT GROUPS

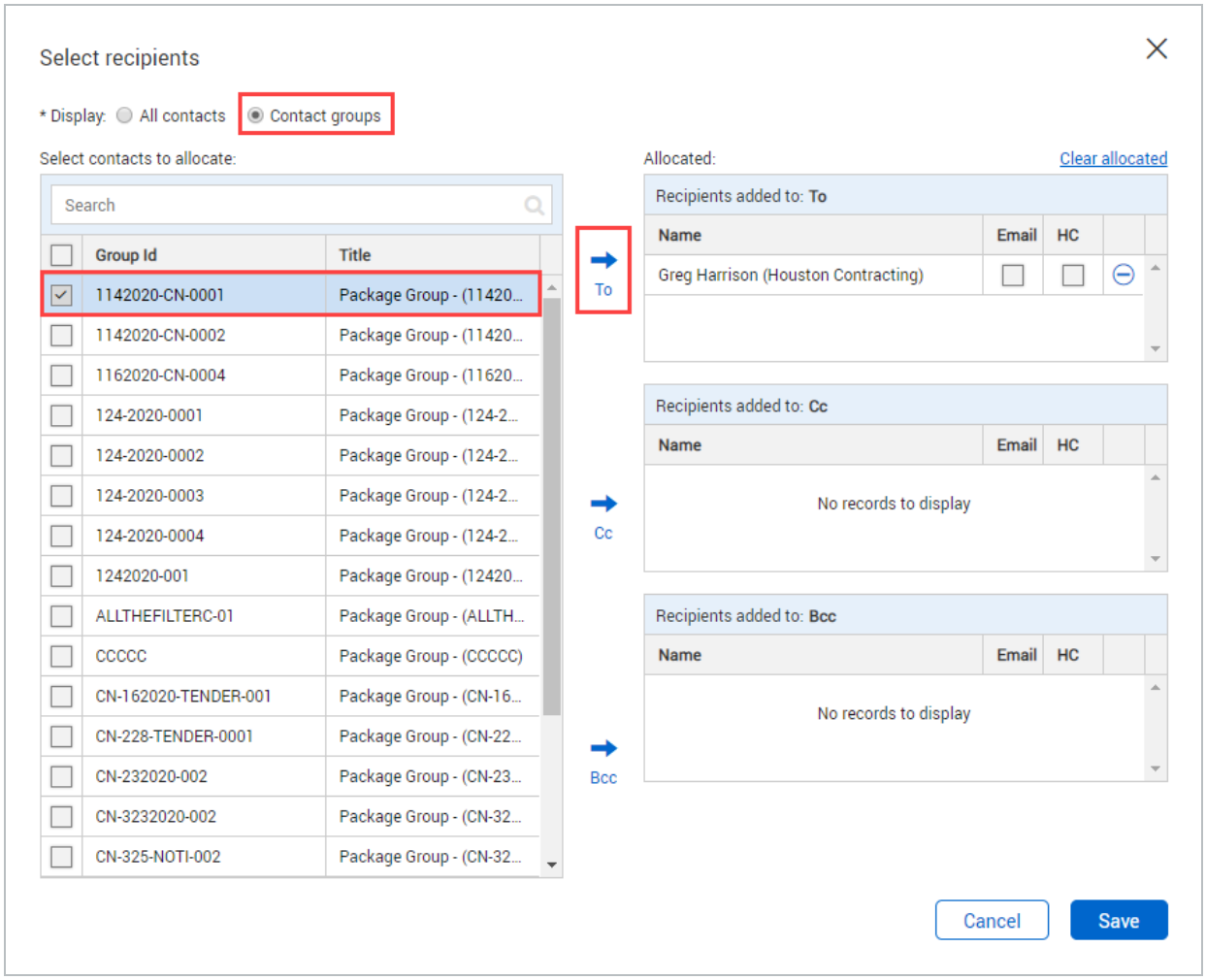
You can use contact groups to easily send mail to all required recipients.

2.3.1 To use contact groups:

1. Open the mail compose screen.
2. Click **To**.



3. Select **Contact groups**.
4. Select the contact group and click the appropriate **arrow icon** to assign them to the To, Cc or Bcc fields.



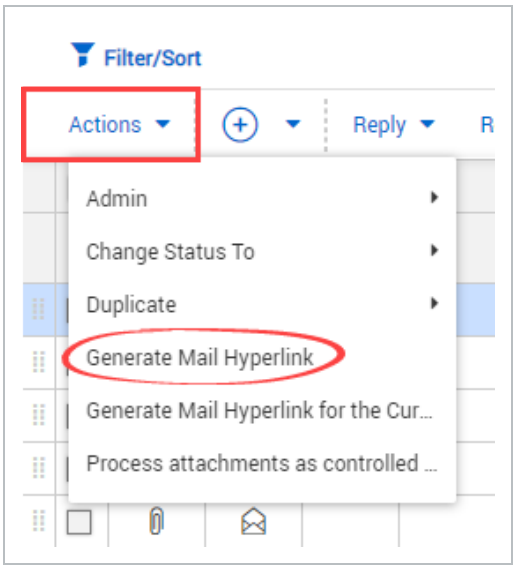
5. Click **Save**.

2.4 GENERATING A MAIL HYPERLINK

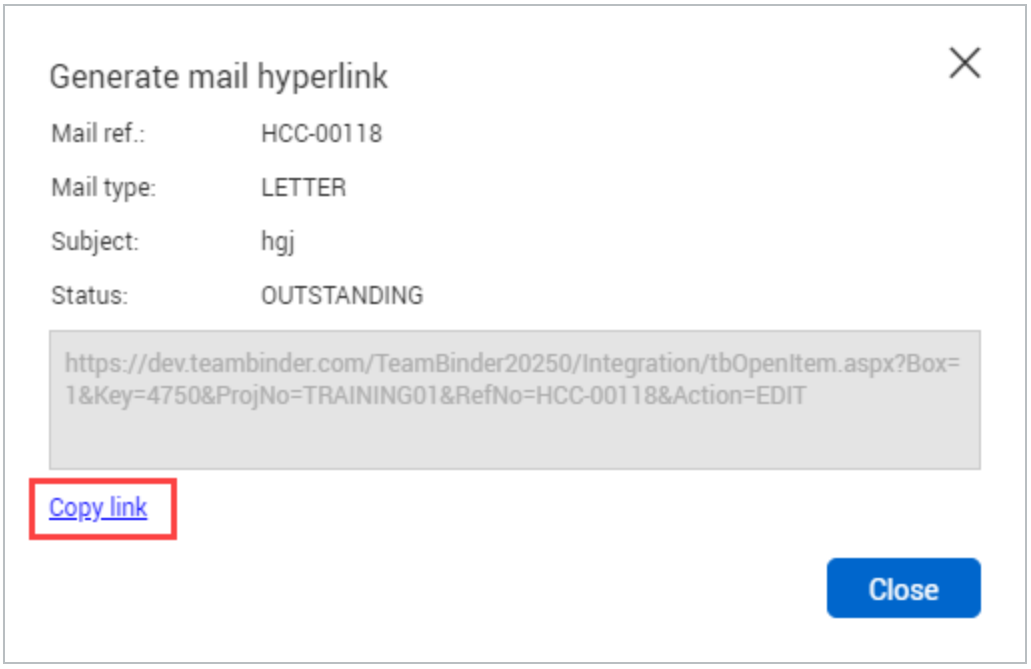
A hyperlink to a mail item can be sent to another user that will take them directly to that mail. The user must have access to the mail and log in to view the item.

2.4.1 To generate a mail hyperlink:

1. Select the mail.
2. Click **Actions** and select **Generate Mail Hyperlink**.



3. Click **Copy link**.



4. Click **Close**.

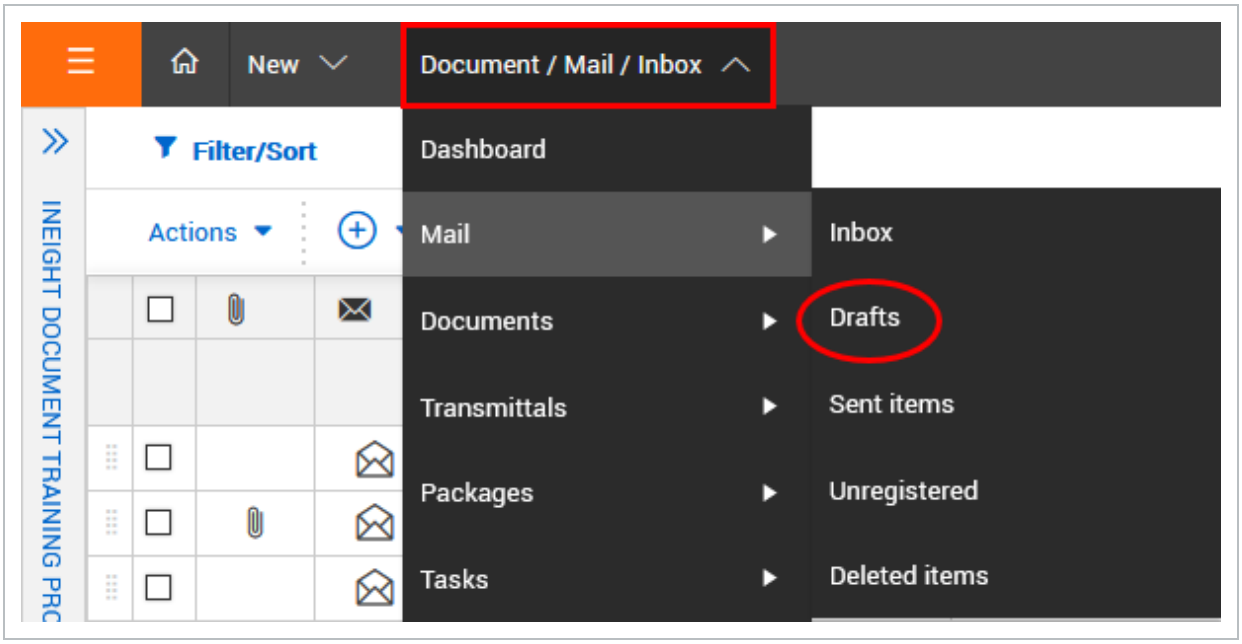
NOTE Generate a hyperlink for the current Register view by selecting **Generate hyperlink for the Current Register**.

2.5 SENDING DRAFTS

You can send drafts from within the **Drafts** folder of the Mail Register.

2.5.1 To send a draft:

1. Click the **Module** drop-down menu.
2. In the **Mail** menu, select **Drafts**.



3. Open the draft mail and make any required updates.
4. Click **Send**.

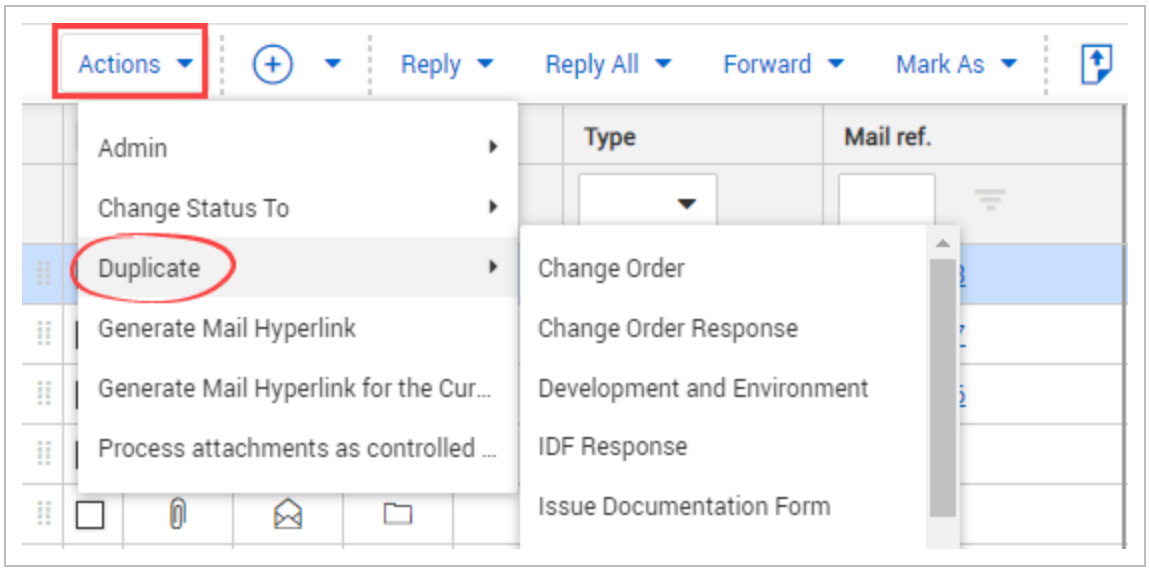
NOTE Printed drafts are automatically stamped as DRAFT.

2.6 DUPLICATING MAIL

You can duplicate mail to copy attributes from an existing mail. You can edit the new mail as required.

2.6.1 To duplicate mail:

1. Select the mail and click **Actions**.
2. In the **Duplicate** menu, select the type of new mail.



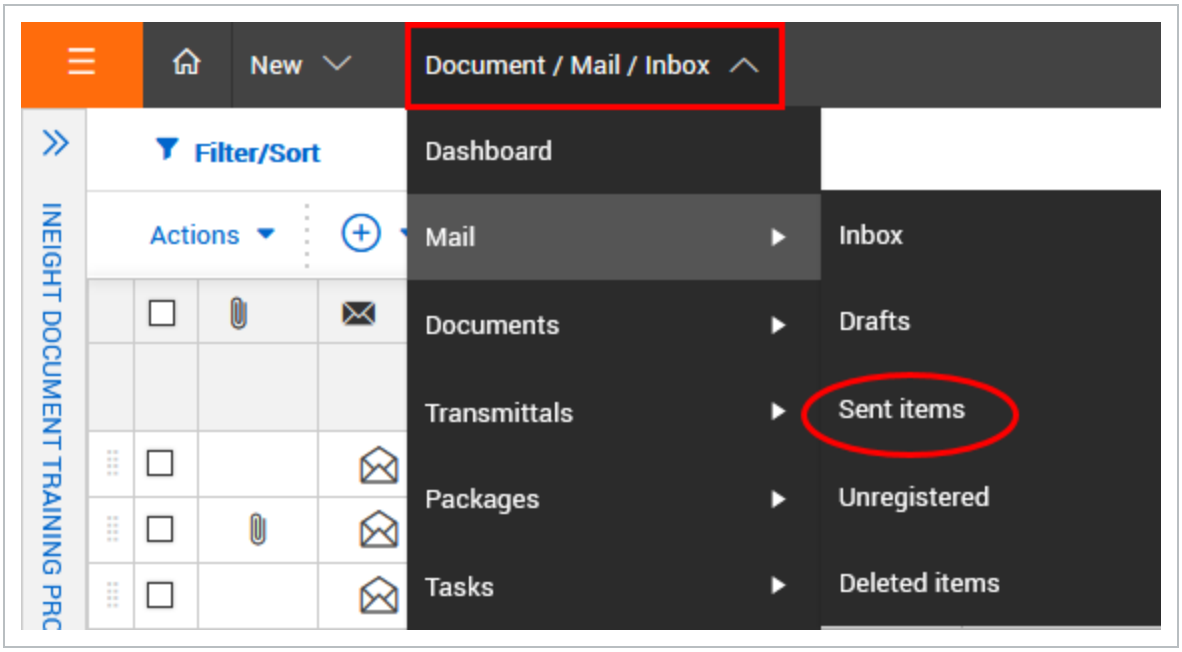
3. Edit the mail details.
4. Click **Send**.

2.7 CANCELLING MAIL

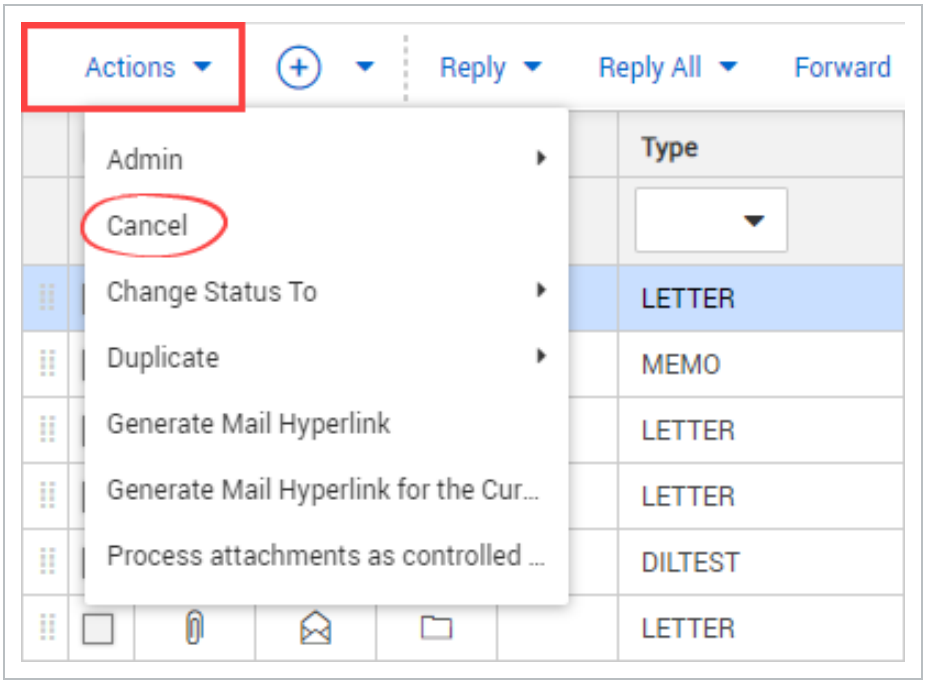
You can only cancel mail from the **Sent Items** folder. Mail can only be cancelled if this option is activated in the project settings.

2.7.1 To cancel mail:

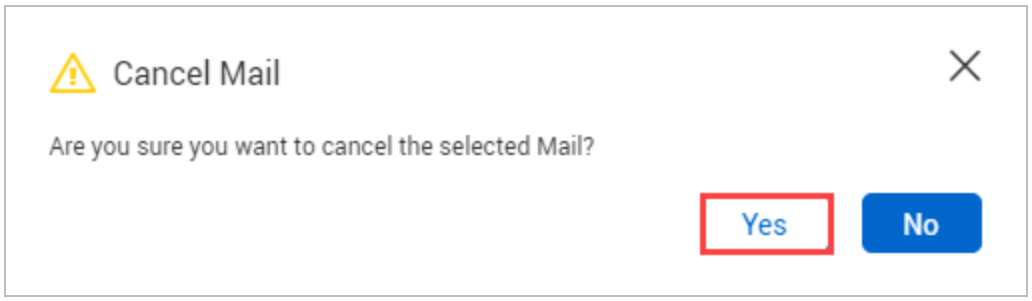
1. Click the **Module** drop-down menu.
2. In the **Mail** tab, select **Sent Items**.



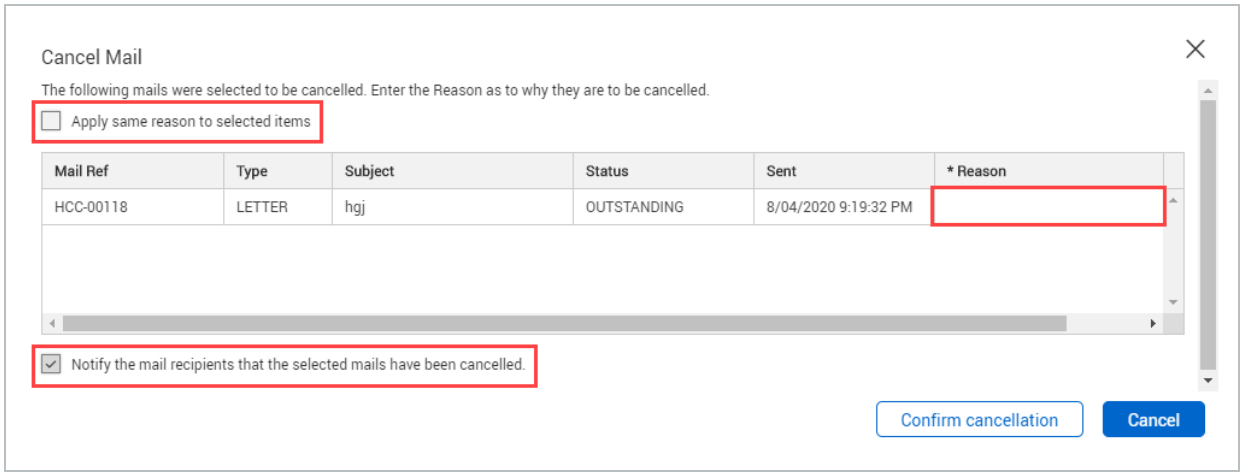
3. Click **Actions** and select **Cancel**.



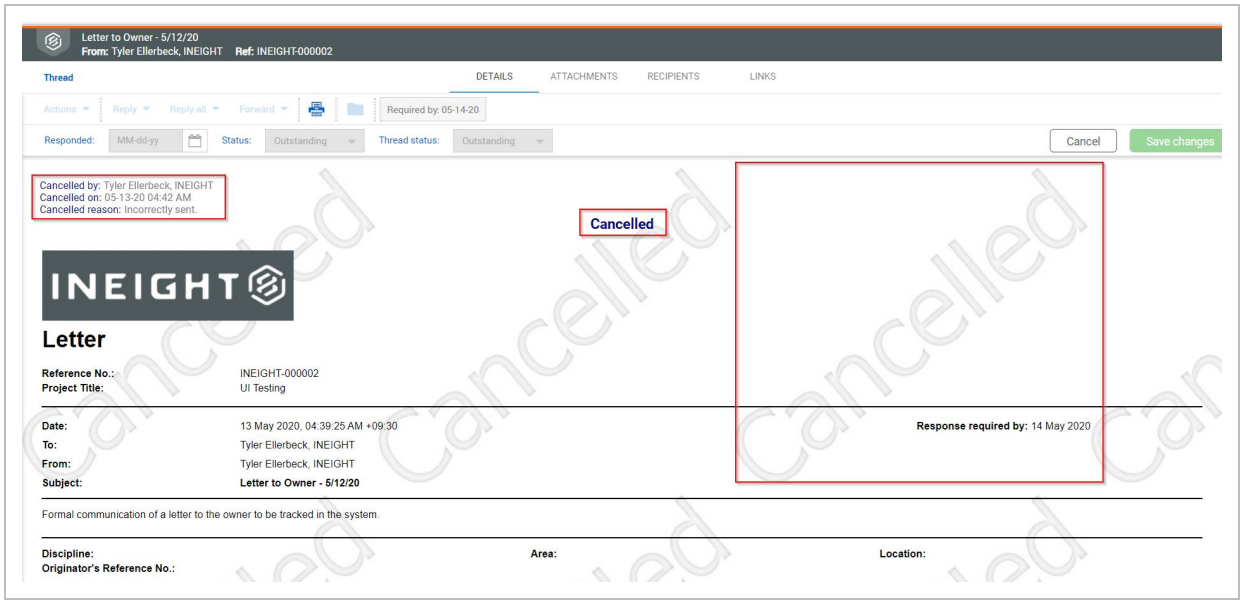
4. Click **Yes**.



5. Enter a reason for cancelling the mail.

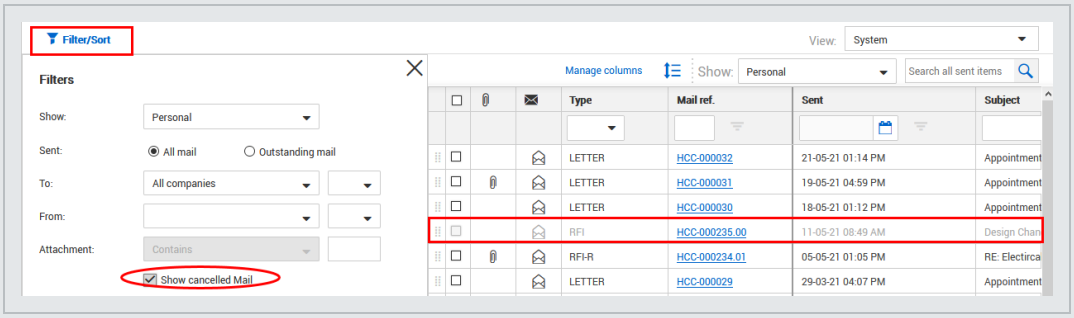


6. Select whether you want to apply the same reason for all items.
7. Select whether you want to notify the mail recipient(s).
8. Click **Confirm cancellation**.



NOTE

- Cancelled mail will be displayed as greyed out in the **Sent Items** folder and in mail threads.
- Cancelled mail will also be displayed with a watermark saying cancelled.
- Cancelled mail will not be removed from external contacts mail system / inbox. If the file was physically attached, it cannot be removed. If it was sent as a hyperlink, the link will be invalid.
- To view cancelled mail in the mail register, click **Filter/Sort** and check **Show cancelled Mail**.



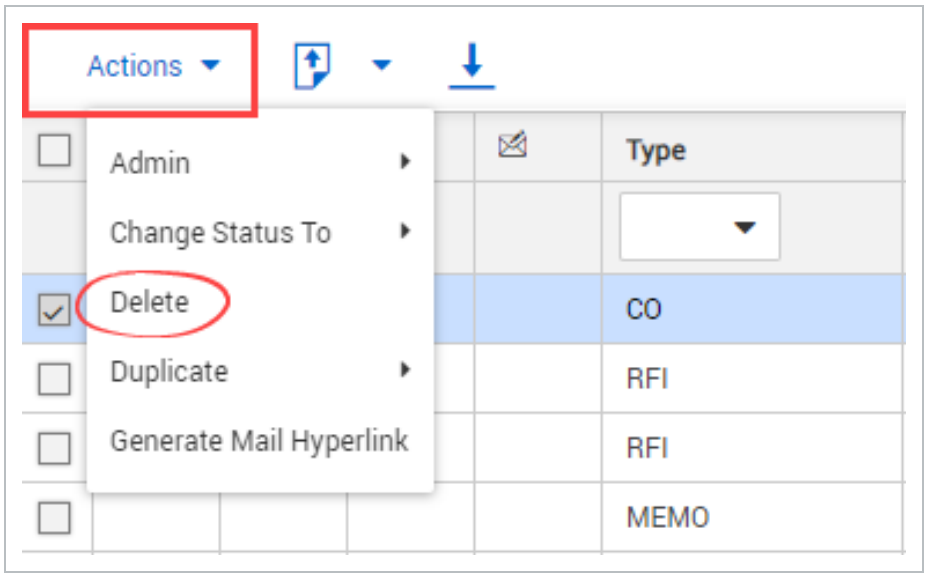
2.8 DELETING MAIL

You can only delete mail in the **Drafts** and **Unregistered Mail** folders. Mail items in your **Inbox** and **Sent Items** folders cannot be deleted.

All deleted mail is moved to the **Deleted Items** folder. From here, you can delete it permanently.

2.8.1 To delete mail:

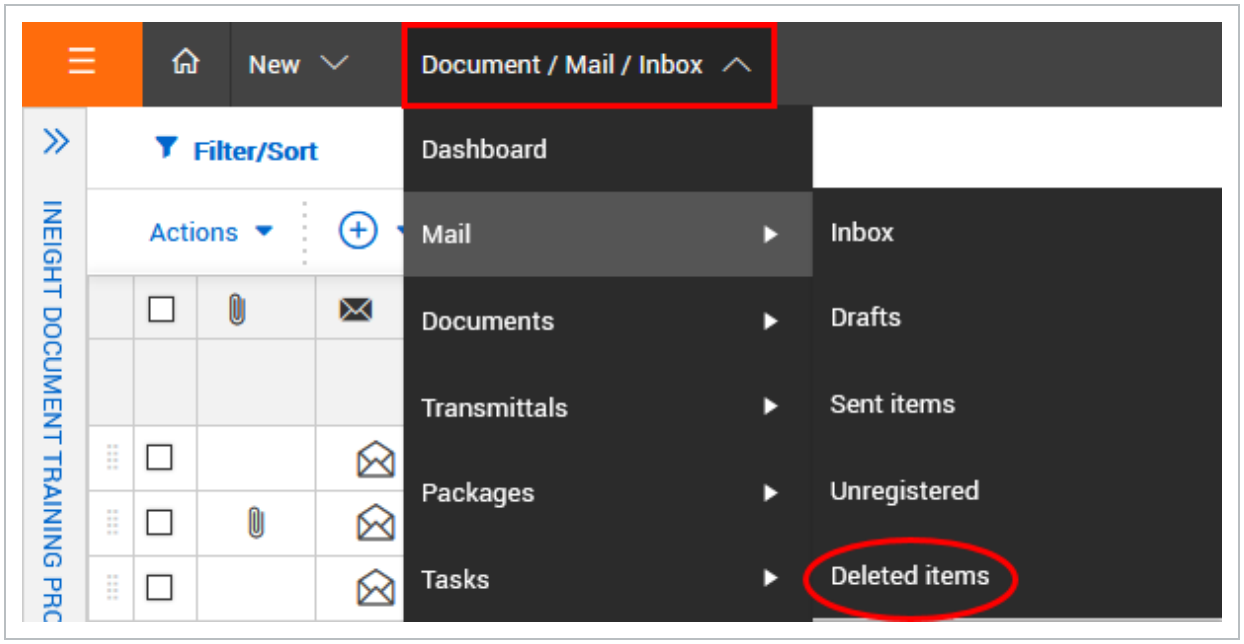
1. Select the mail.
2. Click **Actions** and select **Delete**.



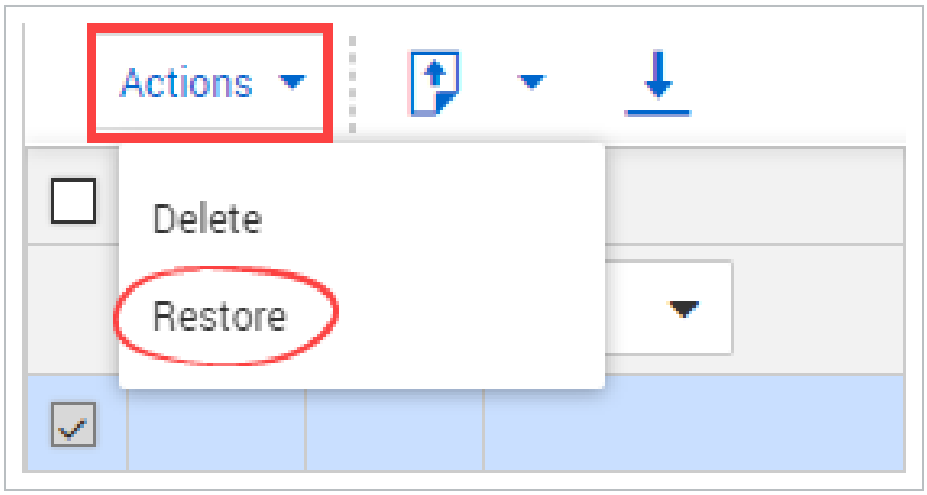
3. Click **Yes**.

2.8.2 To restore deleted mail:

1. Click the **Module** drop-down menu.
2. In the **Mail** menu, select **Deleted Items**.



3. Click **Actions** and select **Restore**.



4. Click **Yes**.

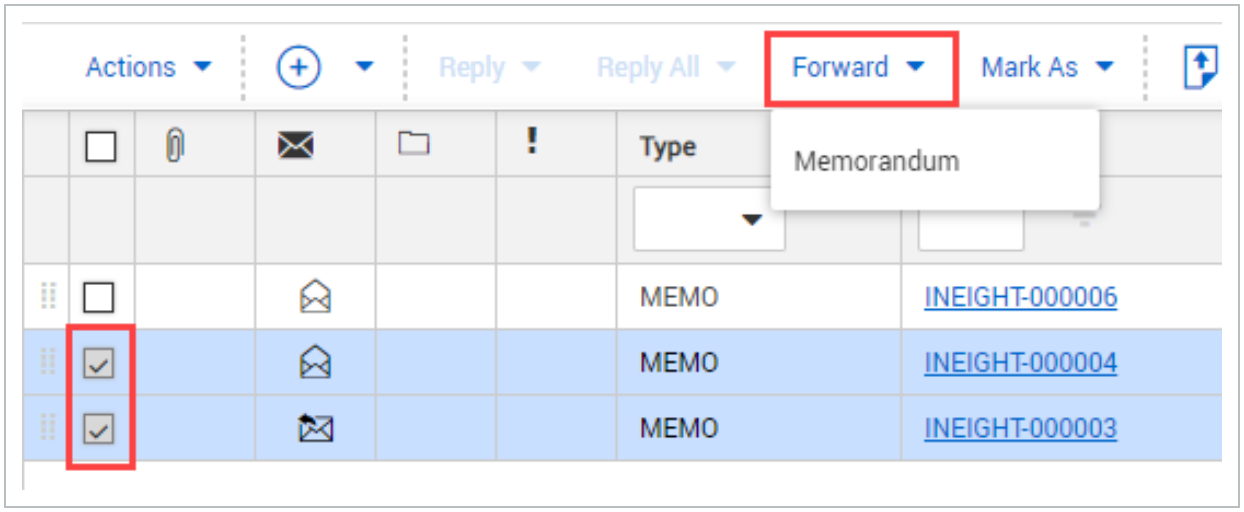
NOTE To permanently delete mail from the **Deleted Items** folder, click **Actions** and select **Delete**.

2.9 FORWARDING MAIL IN BULK

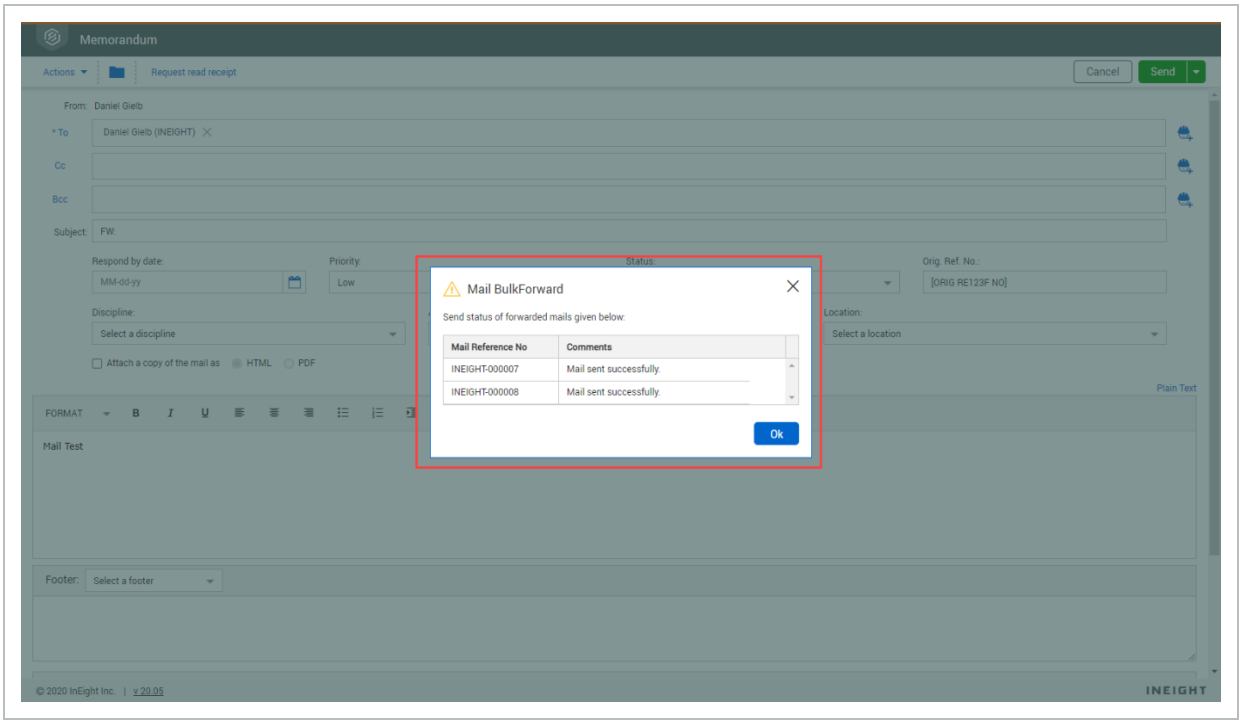
Mail can be forwarded in bulk.

2.9.1 To forward mail in bulk:

1. Select the mail items you would like to forward



2. Click **Forward** and select the mail type.
3. Select the Recipients and populate the mail fields.
4. Click **Send**.



5. The mail items will be forwarded in Bulk, you will receive a prompt informing you of the mail reference no.

CHAPTER 3 – USING ADVANCED MAIL FUNCTIONS

There are a number of advanced mail functions you can perform in the Mail Register.

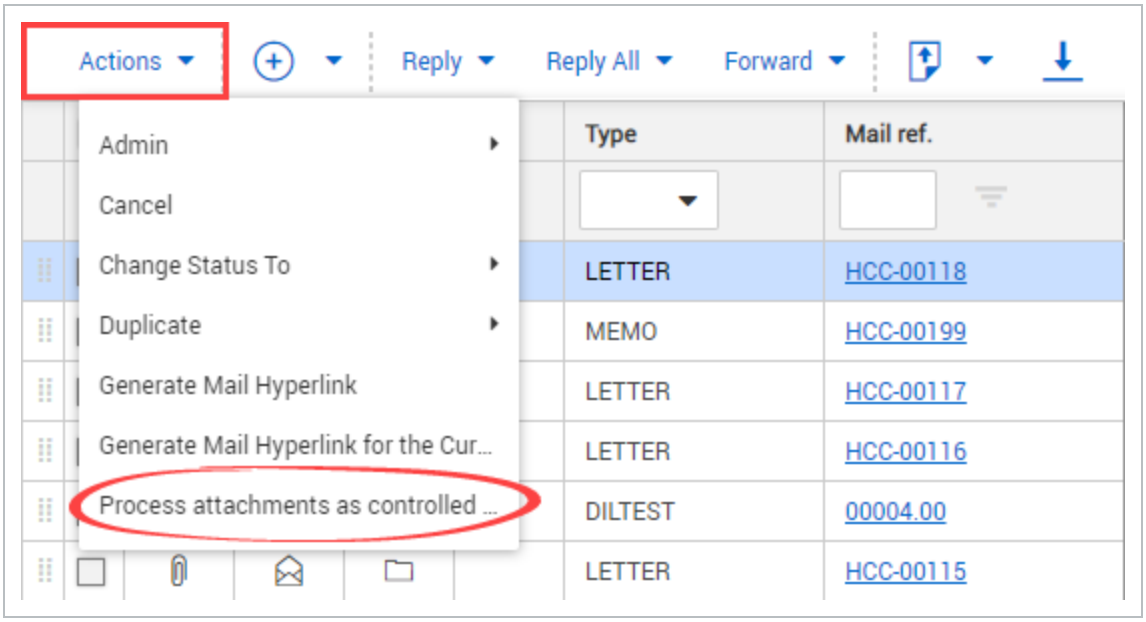
For more information on these functions, see the links below.

3.1 PROCESSING MAIL ATTACHMENTS AS CONTROLLED DOCUMENTS

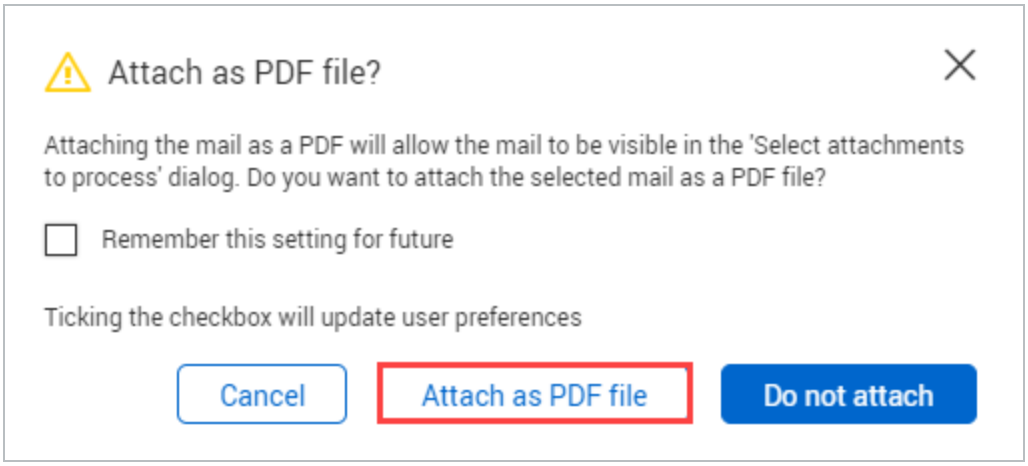
Mail items sent or received within InEight and the files attached to them can be processed as controlled documents.

3.1.1 To process mail attachments as controlled documents:

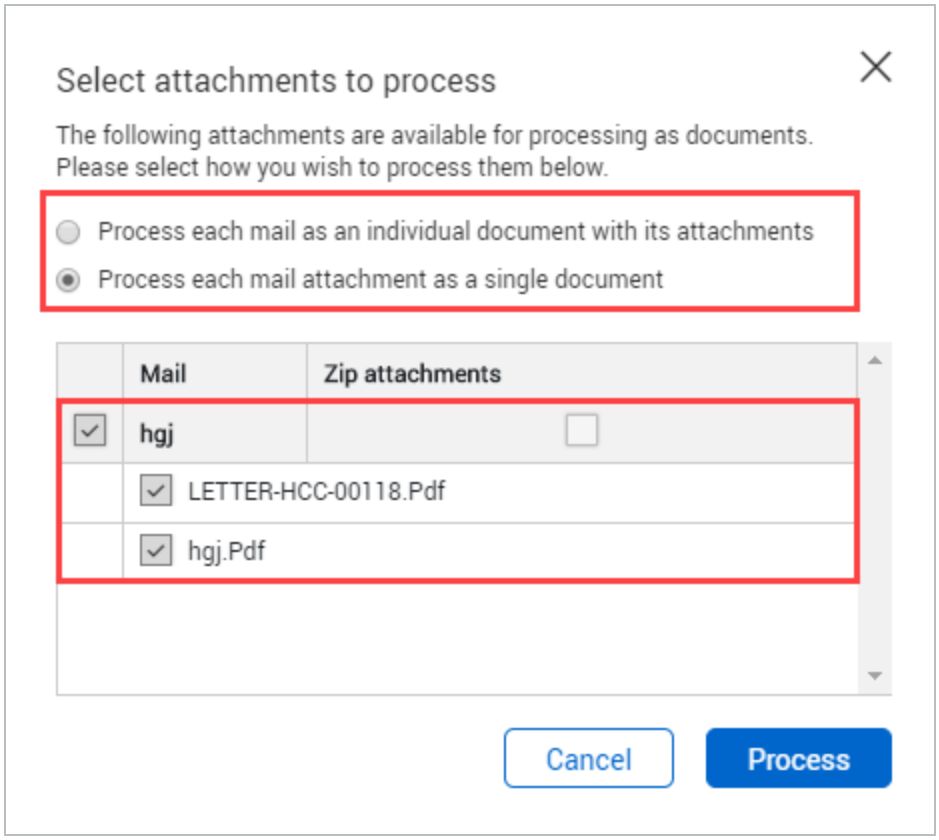
1. Select the mail.
2. Click **Actions** and select **Process attachments as controlled documents**.



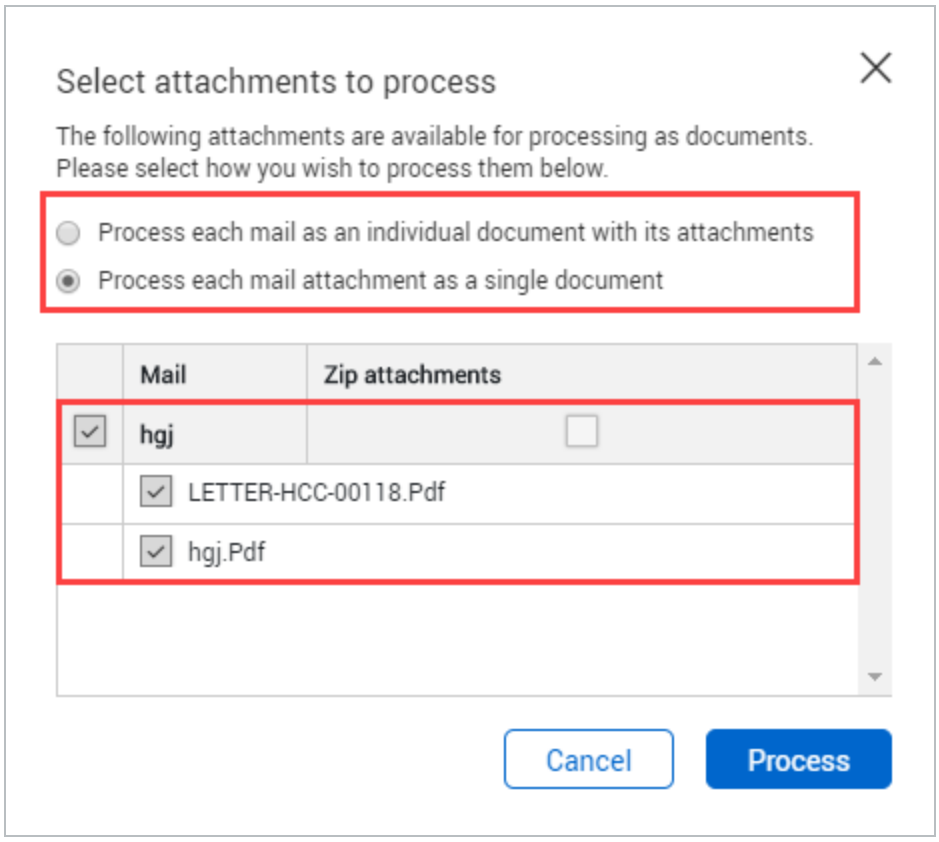
3. Click **Attach as PDF file**.



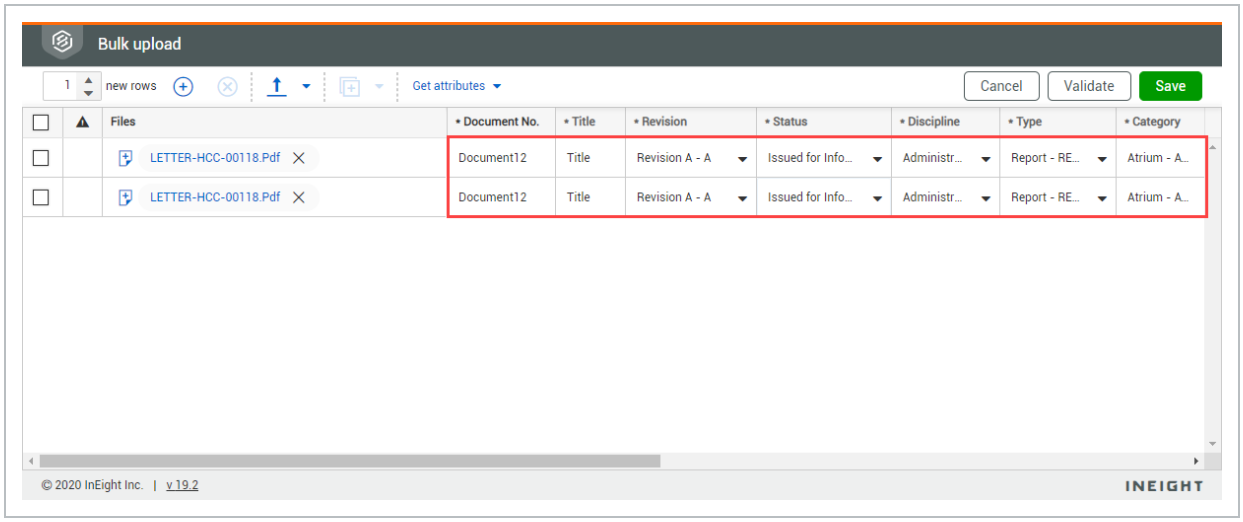
4. Select how you want to process the attachments.



5. Select the attachments you want to process.



6. Click **Process** to open the bulk upload screen.
7. Enter in the document details.



8. Click **Validate**.
9. Click **Save**.

- Click **Yes** if you want to create a transmittal of the saved documents.
- Click **No** to return to the inbox.

3.2 CONFIGURING A NEW MAIL WORKFLOW

You can configure a new mail workflow from the Admin menu. This function is only available to Administrators on the project.

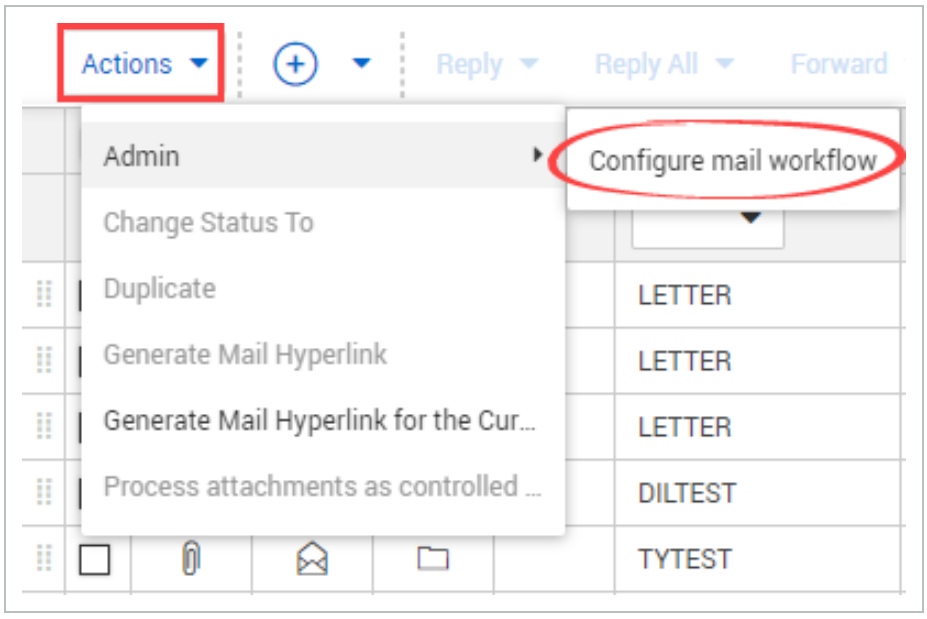
3.2 Step by Step 1 — Configure a new mail workflow

Summary: Configure a new mail workflow to create a new mail type.

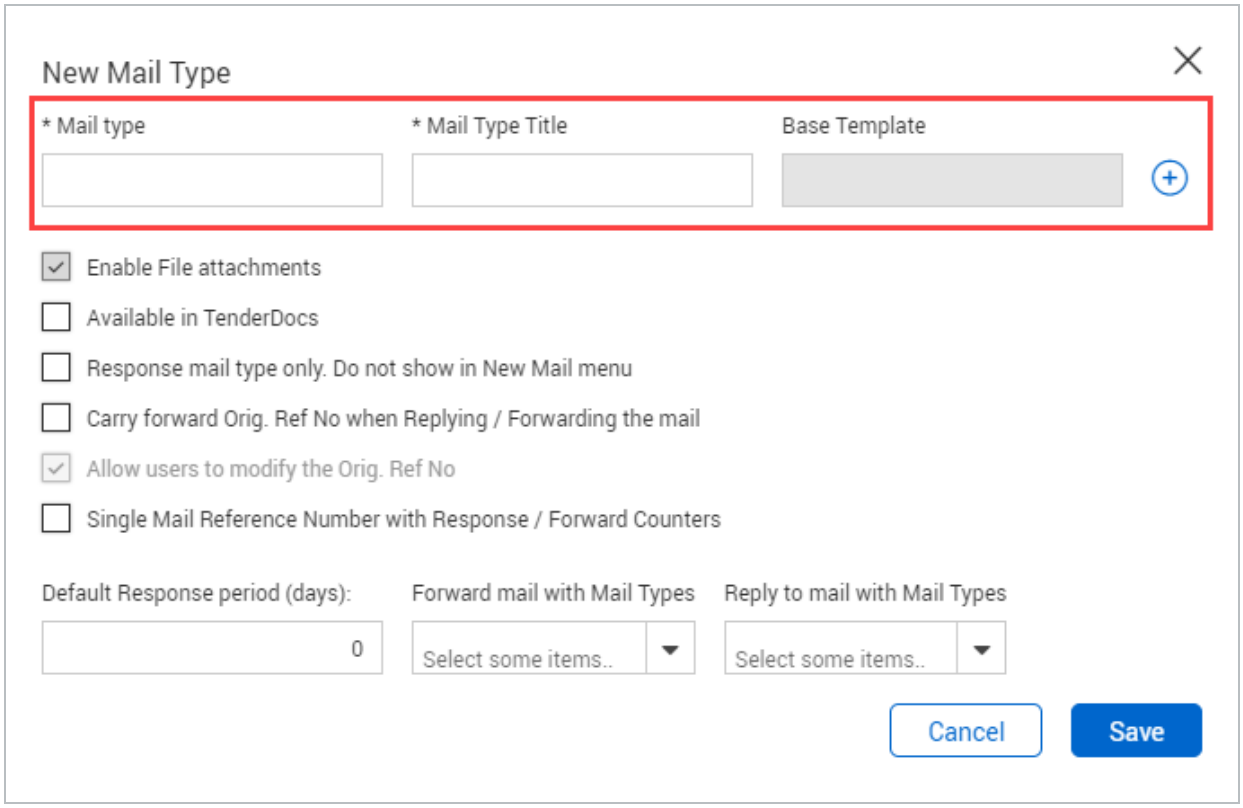
Considerations: New mail types will have all the features of the existing mail type on which they are based, such as sequential numbering within the mail type. After you have created a new mail type, ensure that the relevant users are given access via Security Groups. The default is that no access is given.

Quick steps:

1. From the Mail register, click **Actions**.
2. In the Admin tab, select **Configure mail workflow**.



3. Click the **plus icon**.
4. Enter in the Mail Type and Mail Type Title.



5. Complete the following fields:
   - **Base Template:** Select a template that shows the input and output screen of the mail type.
   - **Available in TenderDocs**: Select this option to make the mail type available in TenderDocs.
   - **Enable File attachments:** Select this option to enable users to attach files to this mail type.
   - **Response mail type only:** Select this option if the mail is only to be used when replying to other mails.
   - **Carry forward Orig. Ref No when Replying / Forwarding the mail:** Select this option so that the original mail reference is copied to the originator's reference when replying or forwarding mails of this type.
   - **Allow users to modify the Orig. Ref No:** Select this option to allow the originator's reference number to be editable when creating a new mail using reply or forward.

- **Single Mail Reference Number with Response / Forward Counters:** Select this option for mail to maintain the original reference number but add a counter at the end of to reflect that mail has been responded to or forwarded.
- **Default Response period:** Select the number of days the mail must be responded to by.
- **Forward mail with Mail Types:** Controls the type of mail that can be used to forward the current mail type with.
- **Reply to mail with Mail Types:** Controls the type of mail that can be used to reply to the current mail type.

6. Click **Save**.

What's next: To edit an existing mail type, select it in the Configure Mail Workflow screen and edit the details as needed. You can also edit the following details:

- To edit the mandatory recipients, click the **Edit** icon in the Mandatory Recipients column. See 3.3 Adding Mandatory Recipients to a Mail Workflow on page 43 for information.
- To select mandatory fields for the mail type, click the Edit icon in the Mandatory Field column, and then select the fields you want to be mandatory. Click **Save**.
- You can select or deselect the Enable File Attachments, Allow Single Mail Reference Number, and Available in TenderDocs check boxes.
- To edit default attributes for the mail type in TenderDocs, click the link in the **Attribute Values** column. The project attributes are used with TenderDocs only. See "Selecting Mail Types for TenderDocs" for more information.

You can delete a mail type only if it has not been used. To delete a mail type, select it, and then click **Delete**.

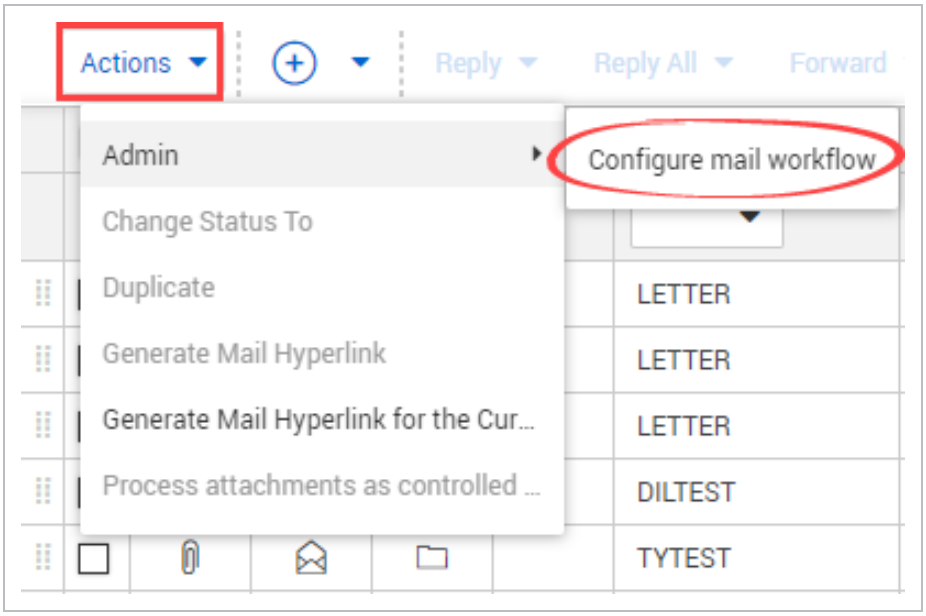
NOTE New mail types can be further customized if required by InEight.

3.3 ADDING MANDATORY RECIPIENTS TO A MAIL WORKFLOW

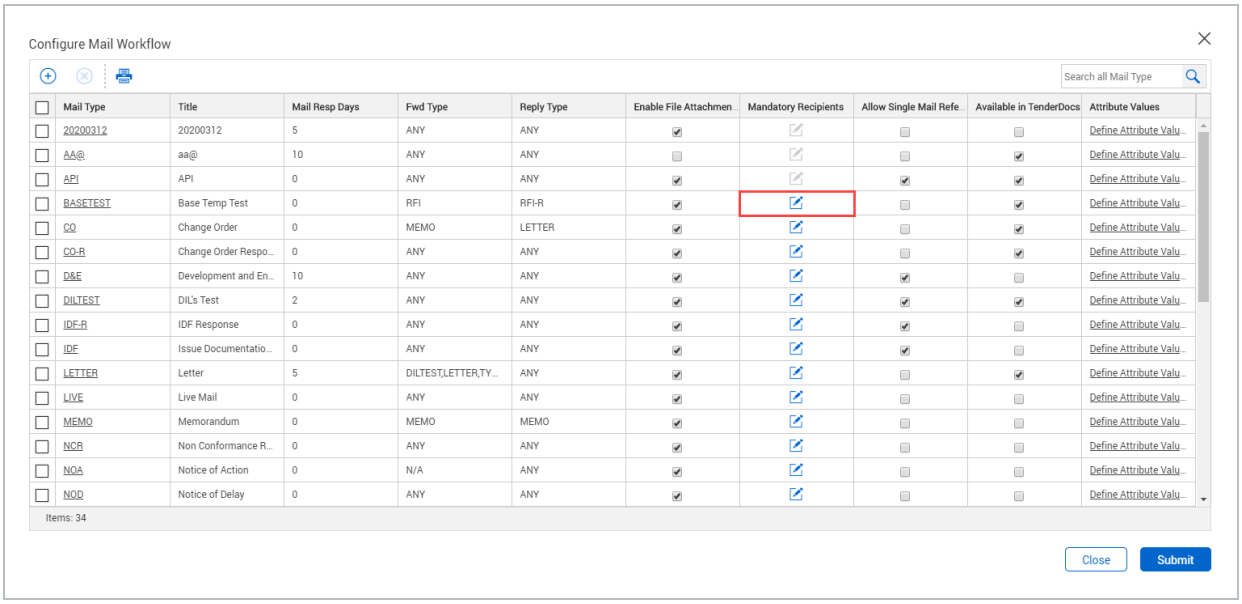
You can add mandatory recipients to a mail workflow from the Admin menu.

3.3.1 To add mandatory recipients to a mail workflow:

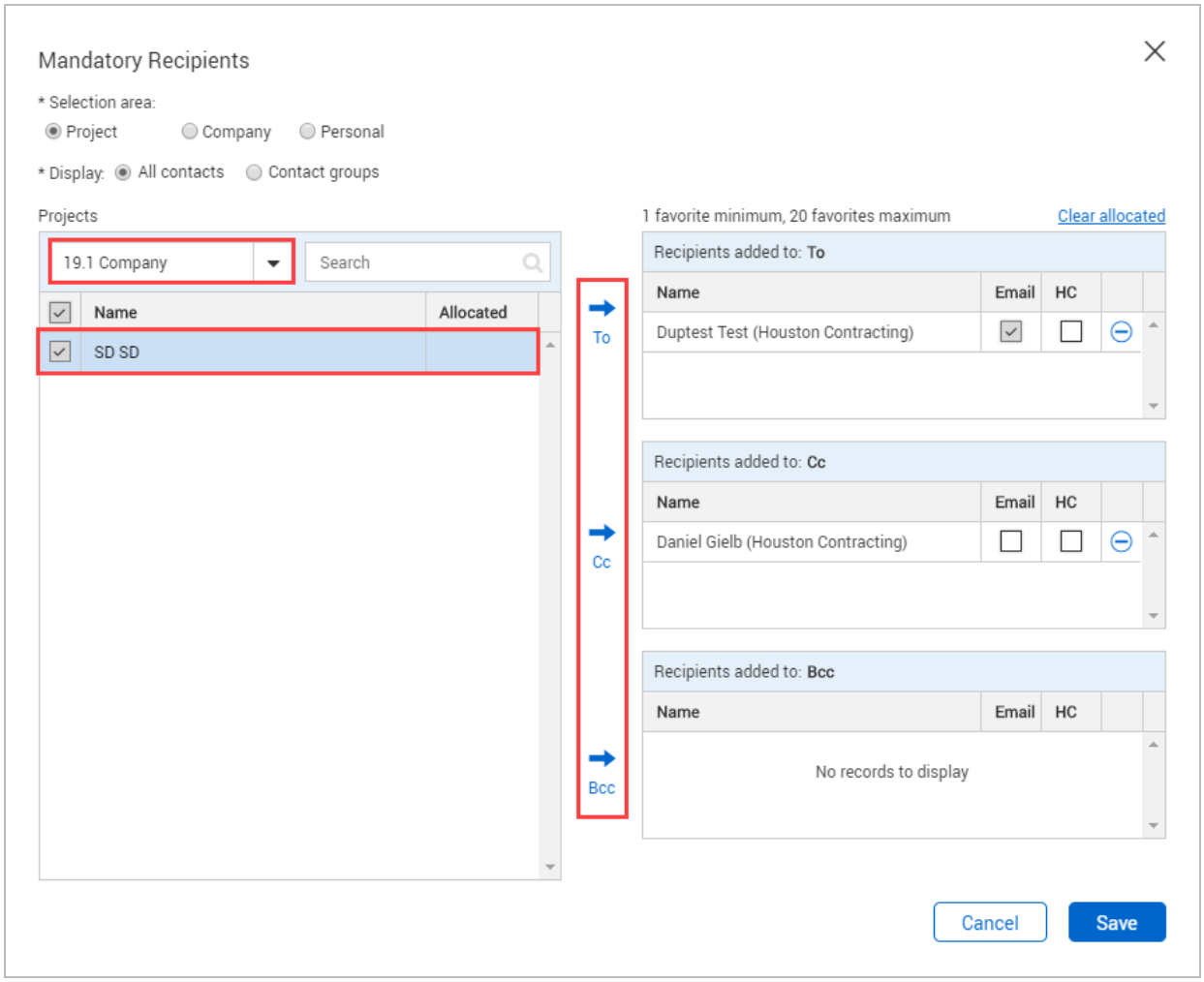
1. Click **Actions**.
2. In the **Admin** tab, select **Configure mail workflow**.



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



4. Select the company name.
5. Select the recipient(s) and click the **arrow icon** to add them to the **To**, **Cc** or **Bcc** fields.



6. Click **Save**.

3.4 SENDING MAIL FOR REVIEW

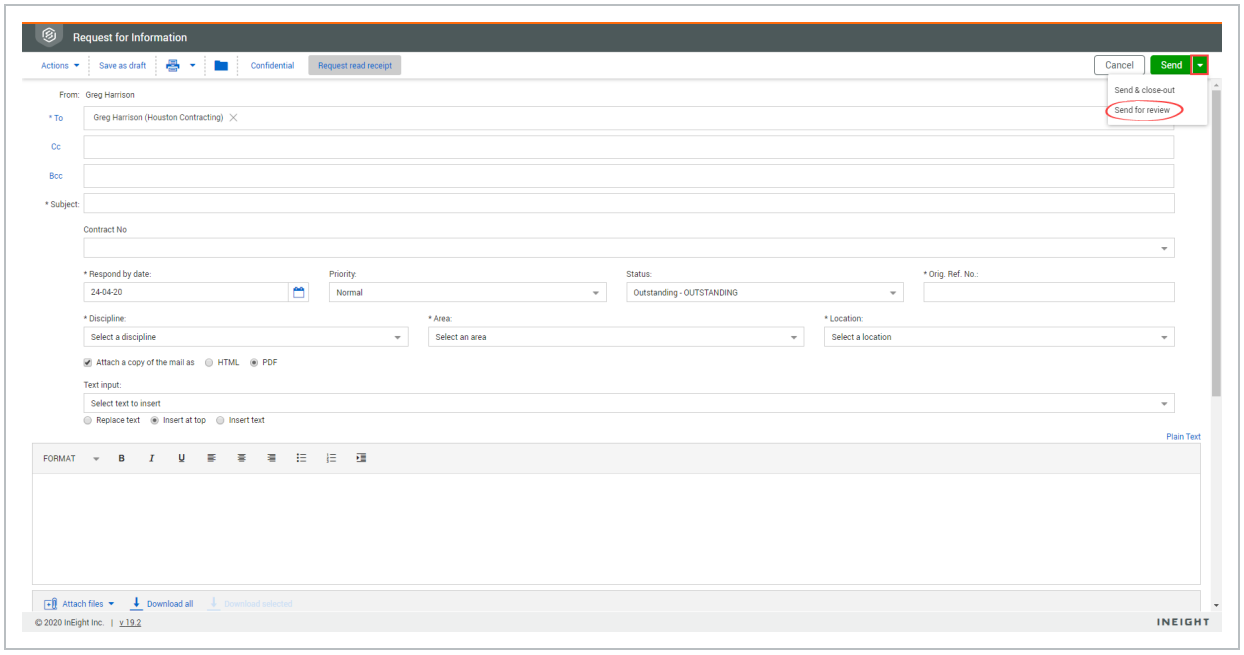
On some projects, mail must be reviewed by one or more people prior to being sent. This is managed in InEight Document using **Send for Review** instead of **Send**.

Mail sent for review can be:

- Reviewed and returned to the originator for sending.
- Reviewed and sent to the final recipient(s).
- Kept as a draft and sent to another internal user for review.

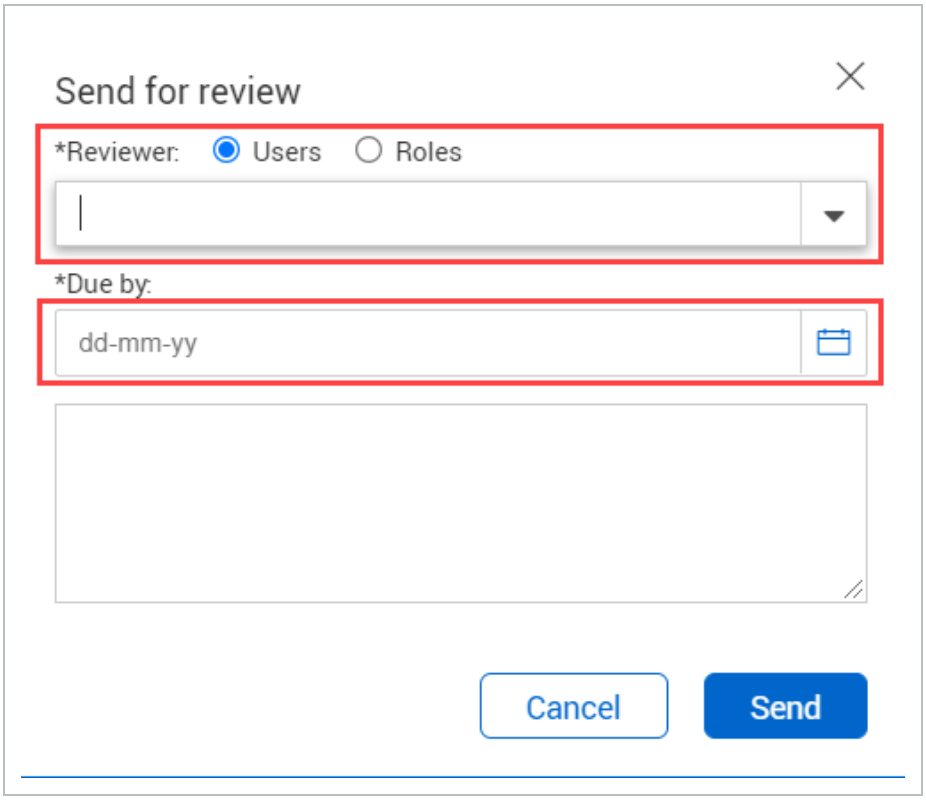
3.4.1 To send mail for review:

1. Click the **arrow** next to Send and select **Send for review**.



   The send for review dialog box opens.

2. Select one of the following radio buttons:
   - **Users**, if you want specific users to review the mail
   - **Roles**, if you want people in a specific role to review the mail
3. Select the reviewer or role.



4. Select the due by date.
5. Click **Send.**

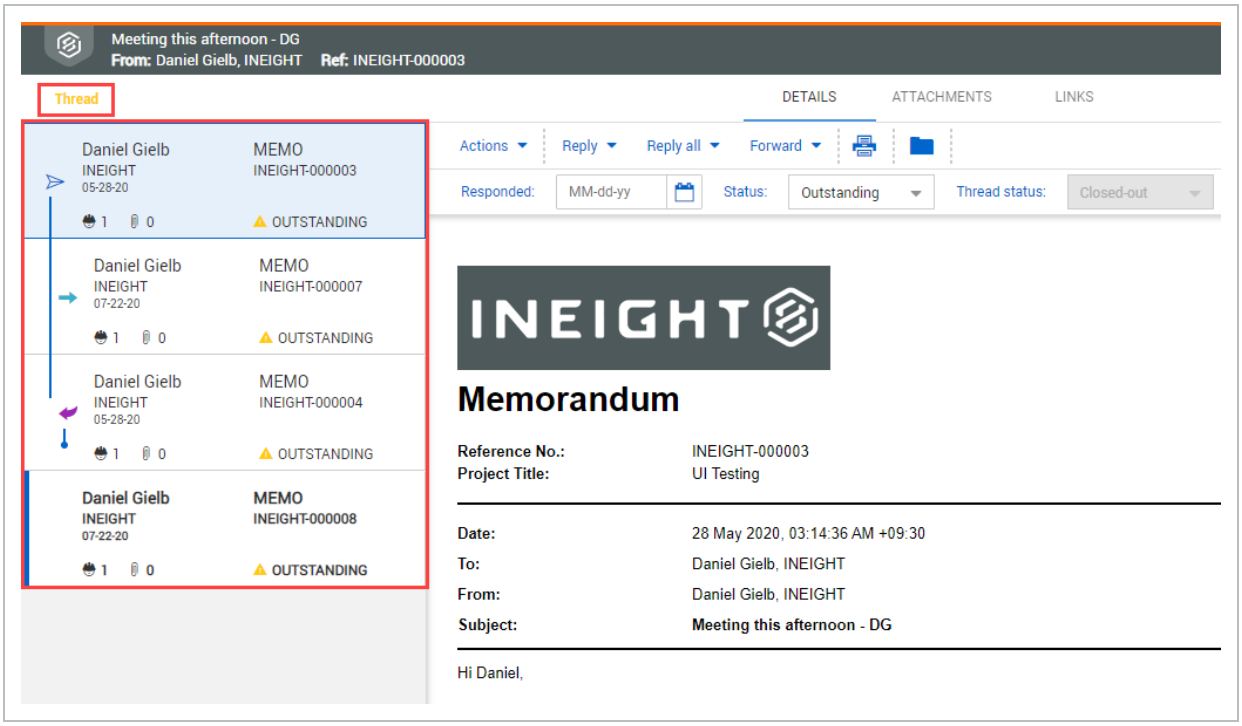
3.5 USING THREAD VIEW

InEight Document builds a thread link between mail items automatically when:

- A mail item is responded to via a reply or forward.
- A mail item is forwarded with other mail.
- Mail is manually linked to other items (mail, documents, transmittals, forms, etc.).

3.5.1 To access mail threads:

1. Open the mail.
2. Click **Thread**.



3.6 PROCESSING UNREGISTERED MAIL

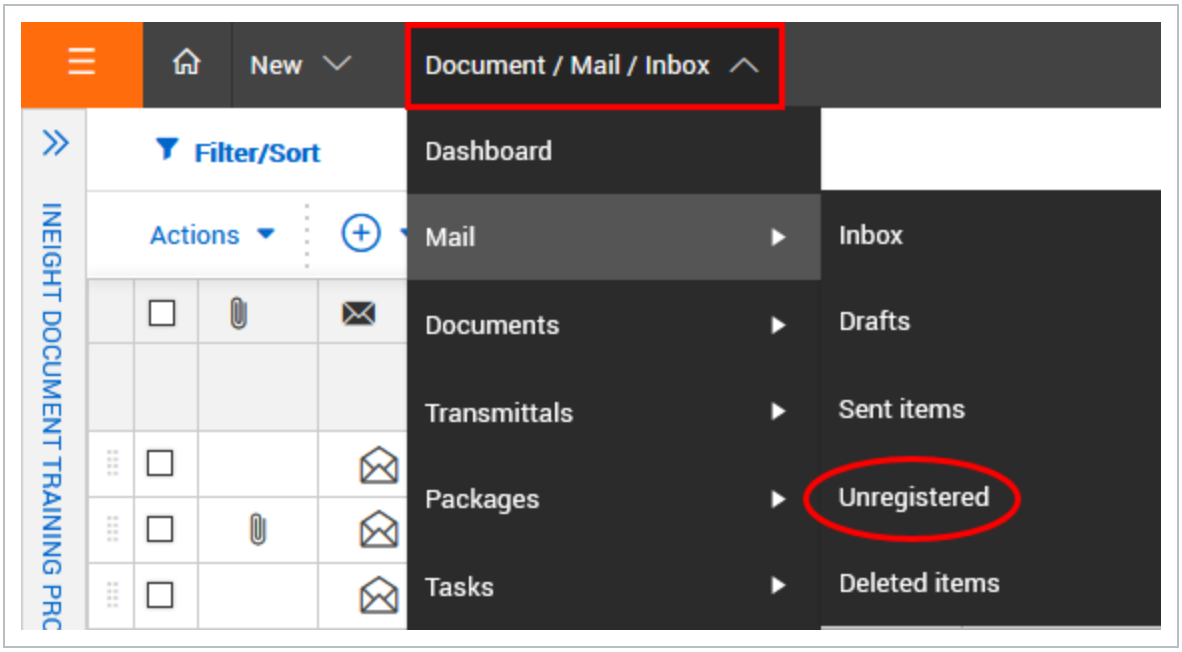
Unregistered mail is generated outside InEight Document either as a reply from an external contact or using an InEight email-in address. As it is generated outside of InEight DOC it will be missing certain InEight fields including mail type. Any missing fields that are mandatory need to be assigned before the mail can be processed into recipient inboxes.

Usually unregistered mail is delivered back to an administrator from an unregistered company or department. However, if the unregistered mail is a response to InEight Mail it may return directly to the originator's personal unregistered mailbox if this access option is available.

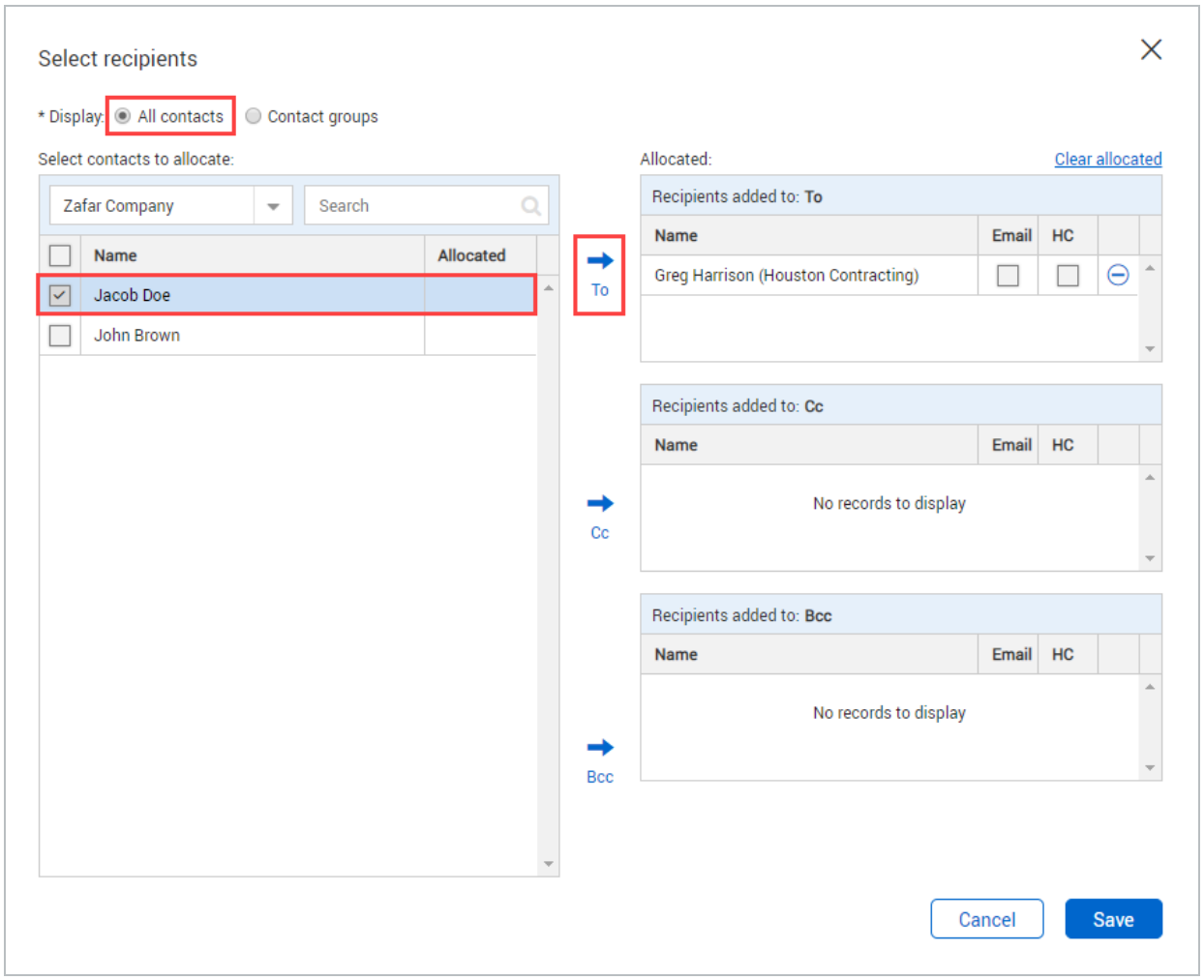
For unregistered mail processed at either a company or department level, the intended recipients are notified about the new incoming mail. The new mail appears in their inbox in the same way as it would as if the sender had sent the mail via InEight Document.

3.6.1 To process unregistered mail:

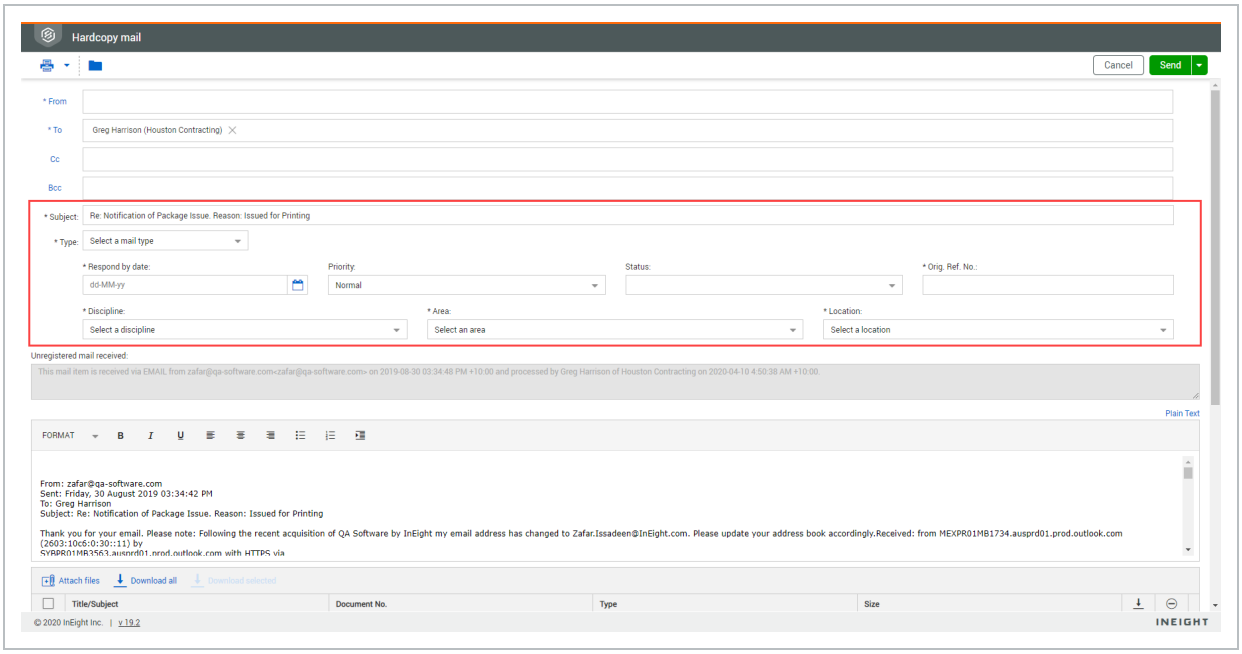
1. Click the **Module** drop-down menu.
2. In the **Mail** menu, select **Unregistered**.



3. Open the mail and click **From**.
4. Select the contact and click the **arrow icon** to add them.



5. Enter the mail details.



6. Click **Send**.

NOTE

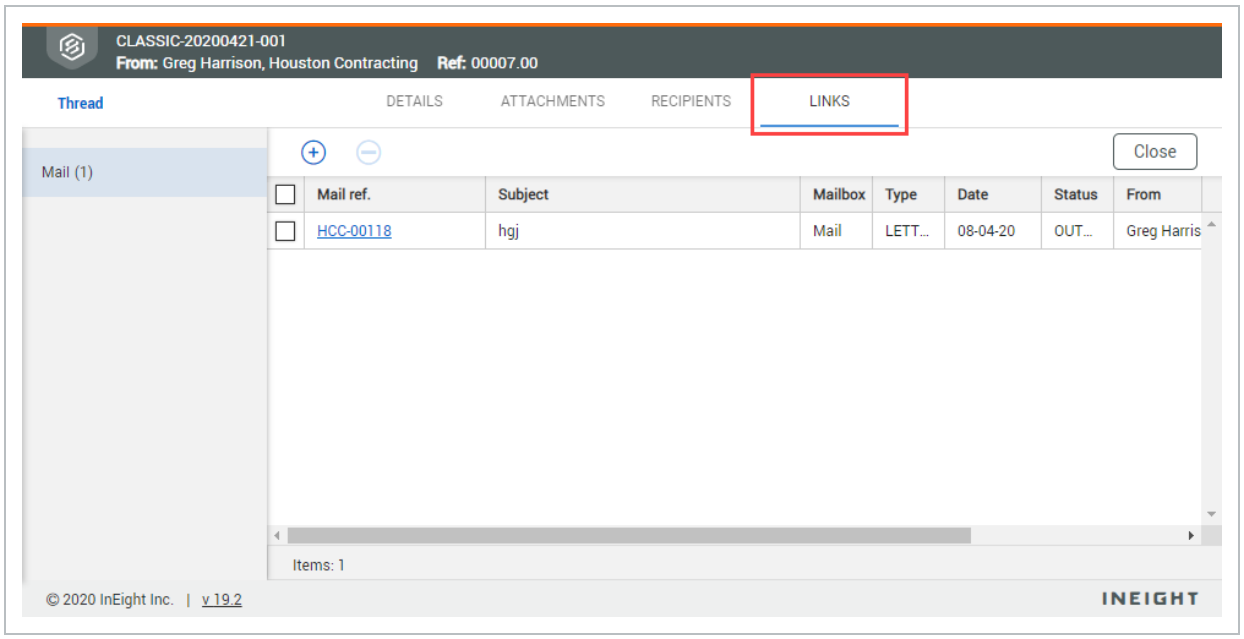
- Any attachments from the email will be automatically attached to the mail.
- The details of how and when the email was received and when it was processed are stored as part of the mail and cannot be edited.
- Users can only process unregistered mail that has been sent to their company's email address.
- The processed mail will appear in the **Sent items** folder of the person marked in the **From** field.
- Click Delete to delete any unregistered incoming emails and move them to the **Deleted Items** folder.
- It is possible to process the incoming email as a document rather than a mail.
- If unregistered mail is a reply that originated from InEight Document, the reference number from the original mail is carried forward to the reply.

3.7 MANUALLY LINKING MAIL

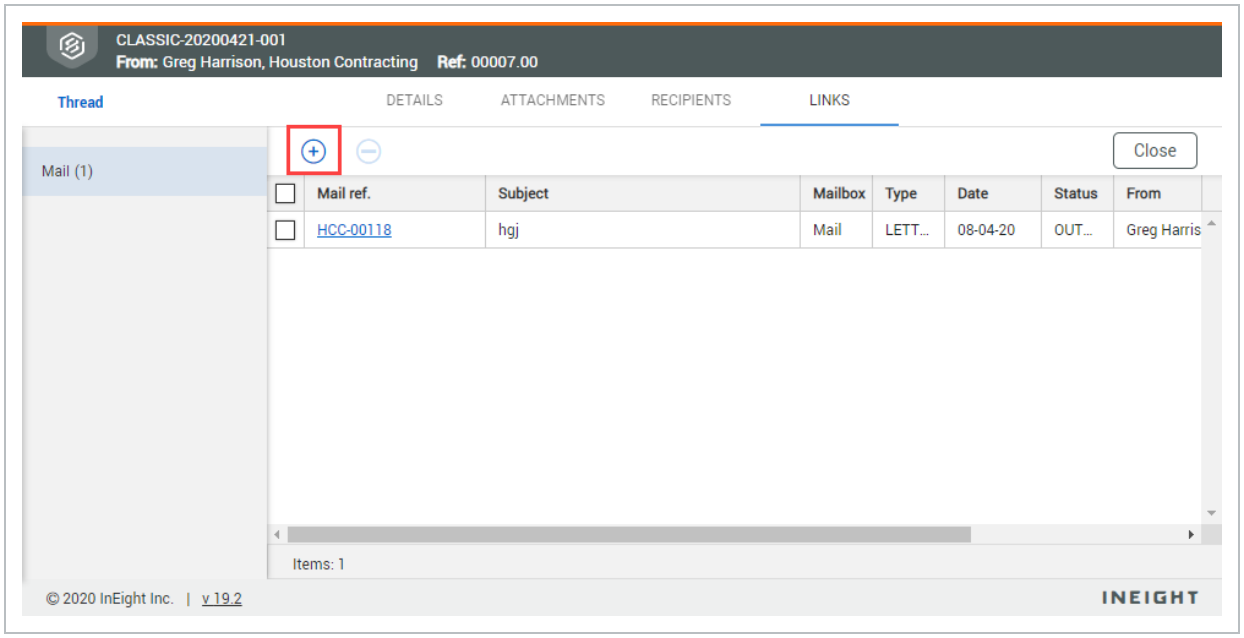
When you reply to mail or forward it, a link to the original mail is created. You can also link mail to other InEight items such as mail, documents, transmittals and forms.

3.7.1 To manually link an item to mail:

1. Open the mail.
2. Click the **Links** tab.

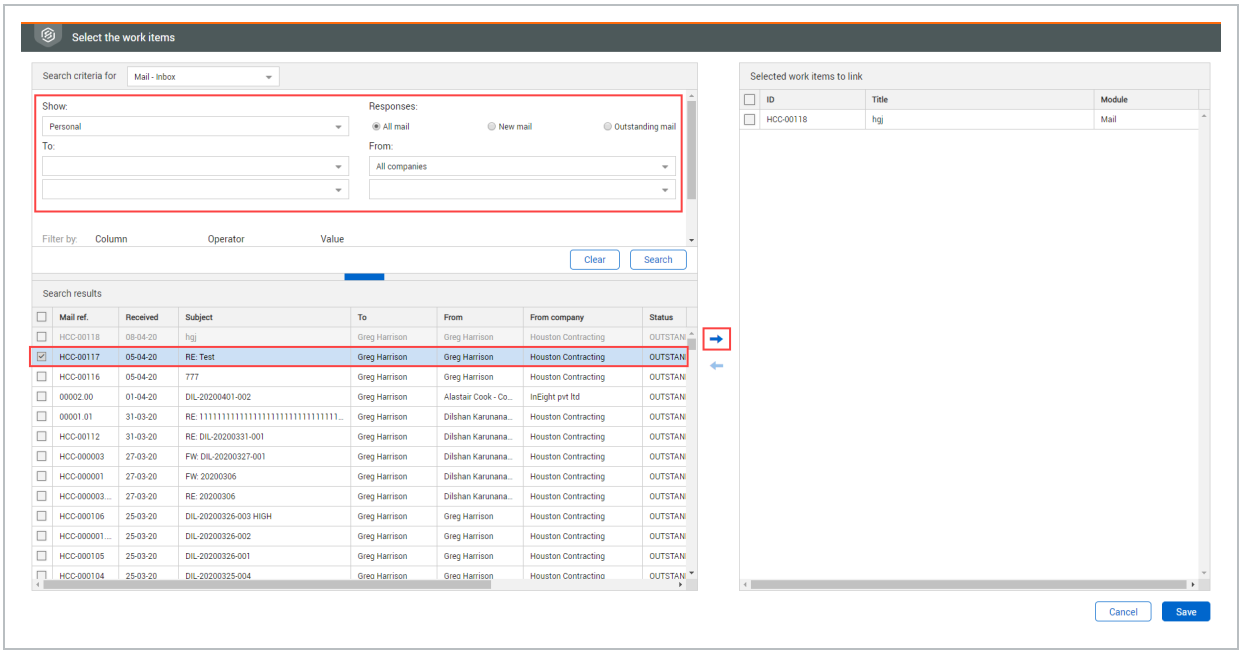


3. Click the **plus icon**.



4. Enter in the item details and click **Search**.

5. Select the item and click the **arrow icon**.



6. Click **Save**.

NOTE

- The default status codes for mail are outstanding (applied to all mail by default) and closed out.
- Additional mail status codes can be configured by administrators.

3.8 ACCESSING INTEGRATED MAIL SERVICE

InEight Document can automatically route normal emails sent to a project directly into the system electronically based on a company email address.

This facility can be provided on a per receiving company/department or per project basis. Any company on the project who wants to allow people to send them communications by email rather than by logging into InEight Document can arrange the activation of the email-In feature by contacting InEight.

3.8.1 The process for applying, activating, and using the email-In service is summarized as follows:

1. A decision is made by a company on a project to use the email-In service.
2. The company contacts InEight who arranges an email address specifically for this purpose (only InEight can arrange this).
3. The company then notifies their own staff for the purpose of forwarding project related emails into InEight Document and external parties to email into InEight Document.
4. Any emails sent to the email address set up will appear in InEight Document in the unregistered mailbox where they are processed. This task is normally allocated to a nominated person who checks for incoming emails daily.
5. The person nominated views all incoming emails received and assigns the correct To, From, Cc and mail type details after viewing the electronic copy of the email online. The From person will be auto mapped if their email address exists in the project address book.
6. InEight Document then processes the email as though the sender had created it online from within InEight Document.
7. The sender also receives an email advising them that the email has been received and processed.

NOTE

- Setup email address can be found by clicking the **address book** and selecting **Companies**. Select the company and edit their **Email-in address**.
- Fax can be setup in a similar way to email. A nominal monthly charge applies.
- It is possible to have a single email-In address that is used to receive mail from multiple projects. All such mail is routed into a single nominated project and from that project can be read and transferred to the correct project. Contact InEight for more information.