

DOCUMENT MANAGEMENT



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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 <u>Outlook Integration tool</u> 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.

1.1 Viewing the Mail Register

•	Filter/So	rt						V	iew: Unsaved (Syste	em)
Ac	tions 💌	+ •	▼ B	eply all 🔻 👘 Forwa	rd 🔻 Mark as 💌 📑	0• <u>↓</u> C	Manage columns	t∃ Show: Personal	▼ Se	arch all inbox
	0		1	Туре	Mail ref.	Subject	From user	From company	Status	Due
				-					-	E
		\bigotimes		RFI-R	CC-RFI-R-00001	RE: Clarification on Electrical	Jacob Palmer	Colt Contracting	OUTSTANDING	
	0	\boxtimes		MEM	CC-000008	Restrictions going forward	Jacob Palmer	Colt Contracting	OUTSTANDING	
		\boxtimes		LET	CC-000005	RE: Blocking of Construction A	Ray Colt	Colt Contracting	OUTSTANDING	
				LET	EPS-000002	RE: Updated Closure Plan	Frank Jacobs	Engineering Project Services	OUTSTANDING	
		\boxtimes		LET	CC-000004	RE: Blocking of Construction A	Ray Colt	Colt Contracting	OUTSTANDING	
		\bigotimes		MEM	HCC-000001	Meeting this afternoon	John Smith	Houston Contracting	OUTSTANDING	
						<				

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.

Ξ	Ξ	ଜ	New	~	Document / Mail / Inbox \land		
»	Filter/Sort			t	Dashboard		
INEIGHT	Actions 🔹 🔶		()	Mail	•	Inbox	
			\bowtie	Documents	Þ	Drafts	
DOCUMENT					Transmittals	Þ	Sent items
				\bigotimes	Packages	•	Unregistered
TRAINING			U	\bigotimes	·		
3 PRC	1			\bigotimes	Tasks	•	Deleted items

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.

Filter/Sort									Vi	ew: Unsaved (Syste	m) 🗖	
	Acti	ons 💌	(+) •		▼ R	eply all 🔻 👘 Forwar	d 🔻 Mark as 💌 🚺	0• <u>↓</u> C	Manage columns	t∃ Show: Personal	▼ Sea	rch all inbox
		0	\bowtie		1	Туре	Mail ref.	Subject	From user	From company	Status	Due
						-		-			-	e
						RFI-R	CC-RFI-R-00001	RE: Clarification on Electrical	Jacob Palmer	Colt Contracting	OUTSTANDING	
		0				MEM	CC-000008	Restrictions going forward	Jacob Palmer	Colt Contracting	OUTSTANDING	
			\bigotimes			LET	CC-000005	RE: Blocking of Construction A	Ray Colt	Colt Contracting	OUTSTANDING	
						LET	EPS-000002	RE: Updated Closure Plan	Frank Jacobs	Engineering Project Services	OUTSTANDING	
			\bigotimes			LET	CC-000004	RE: Blocking of Construction A	Ray Colt	Colt Contracting	OUTSTANDING	
			\boxtimes			MEM	HCC-000001	Meeting this afternoon	John Smith	Houston Contracting	OUTSTANDING	
								<				

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

Filters				
Show:	Personal	-		
Responses:	● All mail ○ Ne	ew mail 🛛 Outstanding mail		
To:		•	•	
From:	All companies	•	-	
Filter by:	Column	Operator	Value (i)	
+	Select one	▼ Select one	▼ Select some items ▼	\otimes
+ AND	Select one	▼ Select one	▼ Select some items ▼	\otimes
+ AND	Select one	✓ Select one	✓ Select some items	\otimes

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

▼ Filter/Sort									View: Unsaved (S					
	Actions	•	• •		▼ Re	ply all 💌 🛛 Forwa	rd 👻 Mark as 👻 📑	• <u>↓</u> C	Manage columns	€ Show: Personal	▼ Sea	rch all inbox		
)	\bowtie		1	Туре	Mail ref.	Subject	From user	From company	Status	Due		
						•			-		-	Ê		
			\bigotimes			RFI-R	CC-RFI-R-00001	RE: Clarification on Electrical	Jacob Palmer	Colt Contracting	OUTSTANDING			
		0	\bigotimes			MEM	CC-000008	Restrictions going forward	Jacob Palmer	Colt Contracting	OUTSTANDING			
			\bigotimes			LET	CC-000005	RE: Blocking of Construction A	Ray Colt	Colt Contracting	OUTSTANDING			
						LET	EPS-000002	RE: Updated Closure Plan	Frank Jacobs	Engineering Project Services	OUTSTANDING			
			\bigotimes			LET	CC-000004	RE: Blocking of Construction A	Ray Colt	Colt Contracting	OUTSTANDING			
			\bigotimes			MEM	HCC-000001	Meeting this afternoon	John Smith	Houston Contracting	OUTSTANDING			
								<						

1.3 USING MAIL FOLDERS

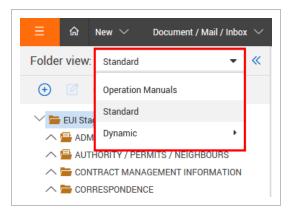
Allocate mail items into folders to make them easier to sort. To view mail folders, click the **arrow icon** to expand the folders section.

_	🗧 🏠 New 🔨 Document / Mail / Inbox 🗸 InEight Document Training Project M 🗡									
»		•	Filter/Sor	t						
INEIGHT		Acti	ons 💌	(+) •	Reply	▼ Rej	oly all 🔻 🛛 Forward 💌	Mark as 💌 🚺 🔻	· <u>↓</u> C	Manage
			0			!	Туре	Mail ref.	Subject	From user
DOCUMENT							-			
NT TR				\bigotimes			RFI-R	CC-RFI-R-00001	RE: Clarification on Electrical	Jacob Palr

							EUI Stage 2 & 3	DOCUMENT01 ~
Folder view: Standard 🗸 🗸		EUI	Stage 2 &	3 > Ne	w mail			
⊕ ℤ ⊗ ∠ ℡ ℔ ℰ		Act	ions 💌	(+) •	Reply	▼ R	eply all 🔻 🛛 Forwar	d 👻 🛛 Mark as 💌
V 늘 EUI Stage 2 & 3			0			1	Туре	Mail ref.
							-	
AUTHORITY / PERMITS / NEIGHBOURS				_				
A 🚔 CONTRACT MANAGEMENT INFORMATION	-						MEMO	HCC-000119
	1						SI	HCC-000013
A 🖶 DAILY REPORTS	-						RFI	EPS-000010
							MEMO	HCC-000115
A 🚔 FINANCIAL		-						
A 📛 LEGAL	-						MEMO	HCC-000114
A 🖶 OCCUPATIONAL HEALTH & SAFETY	1		0				RFI-R	HCC-000018
A 🚔 PROJECT MANAGEMENT	-		0				RFI	HCC-000033
🔨 늘 QUALITY & COMPLETION	-						MEMO	HCC-000111
			•					
A 📛 SUBCONTRACTORS / SUPPLIERS			Û				RFI	HCC-000032
							МЕМО	HCC-000109

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**.

hgj From: Greg Harrison, Houston Contra	acting Ref. HCC-00118		
Thread		DETAILS ATTACHMENTS LINKS	
Actions • Reply • Reply all • Fo	rward 👻 📠 Required by: 15-04-20		
Responded: dd-MM-yy 💾 Status	Outstanding - Thread status: Outstanding -		Cancel Save chang
Letter			
Reference No.: Project Title:	HCC-00118 Training01 Project for TeamBinder		
Date:	08 April 2020, 04:19:31 AM -7:00		Response required by: 15 April 2020
To:	Joe Fredericks, Houston Contracting Dilshan Karunanayake, Houston Contracting Alastair Cook - Company, InEight pvt Itd John Cena, JBL COMPANY		
CC:	Greg Harrison, Houston Contracting Bret Lee - Department, InEight pvt Itd		
From:	Greg Harrison, Houston Contracting		
Subject:	hgj		
Best Regards, Dilshan Karunanayake (LETTER)		
Discipline: Contracts & Procurement Originator's Reference No.: GJHGJHGJ		Area: Area 31	Location: sdcscsdcdsc
Disclaimer: This is a confidential message intended for the named	recipient only. The contents herein are privileged to the sender and the use thereof is re	stricted to the intended purpose. If you have received this e-mail in error, pleas	e secure its contents and reply to the sender. Thank you.
			INEIG

3. Select the folder.

Show folders for:		
All	~	
✓ Training01	Project for TeamBinder	
_	528 - 528	- 1
^ ┣	ADMINISTRATION - D	
^ b	AG Test 1 - AGPaste	
∧ <	AUTHORITY / PERMITS / NEIGHBOURS - B	
-	Classic TB Smart - ClassiCTB	- 1
-	Classic TB Smart 1 - ClassiCTB1	- 1
<u>∧</u> [] [= 0	CONTRACT MANAGEMENT INFORMATION - A	
<u>∧</u> [] [= 0	Core Folder - 526	
<u>∧</u> □ □	CORRESPONDENCE - C	
^ 🗌 📛 I	DAILY REPORTS - G	
 	DIL-PRIVATE - DIL-PVT	
🔤 🔚 I	DIL-PUBLIC - DIL-PUB	
-	document folder - doc	
^ 🗌 📛	FINANCIAL - E	
	LEGAL - H	

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.

Actions 🔻	🛨 🔻 Reply 🔻 Reply All 💌	Forward 👻 Mark As 💌 🚺
	Change Order	Mail ref.
	Change Order Response	-
II 🗆 🚺	Development and Environment	HCC-00118
II 🗆 🚺	IDF Response	HCC-00117
II 🗆 🚺	Issue Documentation Form	HCC-00116
	Letter	00002.00
II 🗆 🚺	Live Mail	<u>00001.01</u>
II 🗆 🚺	Memorandum	HCC-00112
	Non Conformance Report 2	HCC-000003

2. Enter the mail details.

ctions 🔻	Save as draft 🛛 📇 💌	Re	quest read receipt					Cancel	Send
From:	Greg Harrison								
* To	Greg Harrison (Houston Contra	cting) $ imes$							
Сс									
Bcc									
* Subject:									
	Contract No								
									-
	* Respond by date:	Priority:			Status:		* Orig. Ref. No		
	06-05-20	Normal		*	Outstanding - OUTSTANDING	~			
	* Discipline:		* Area:			* Location:			
	Select a discipline	-	Select an area		~	Select a loca	tion		-
	Attach a copy of the mail as	HTML O	PDF						_
	Text input:								
	Select text to insert								-
		p 🔘 Insert tex							

- 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.

actions 👻 Save as draft 🛛 📇 💌	Request read receipt			Cancel Send -
 Replace text Insert at top 	p 🔘 Insert text			Plain Text
FORMAT V B <i>I</i> <u>U</u>				
0				
→ Attach files → Download all				
Title/Subject	Document No.	Туре	Size	<u>↓</u> ⊖
	There are	no attachments uploaded.		
				*
ems: 0				•
ms: 0				Ţ

- 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:

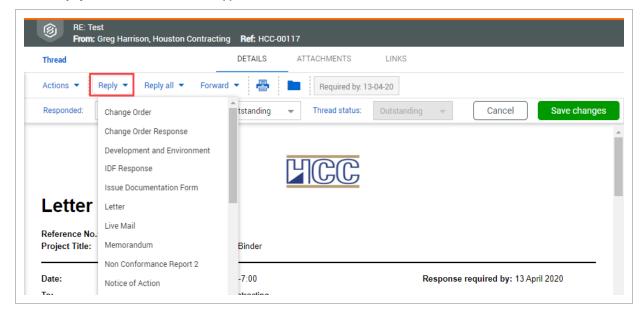
1. Select the mail to enable more options.

	Actio	ons 🔻	(+) •	Reply	y ▼ R	eply All 🔻 🛛 Forward	🔹 Mark As 👻 🚺) + <u>+</u>		
		0	\bowtie		1	Туре	Mail ref.	Received 👃		
						-	-			
	~	0				LETTER	HCC-00118	08-04-20 04:19 AM		
1		Ø				LETTER	HCC-00117	05-04-20 11:18 PM		
1		Ø	\times			LETTER	HCC-00116	05-04-20 09:32 PM		
1						DILTEST	00002.00	01-04-20 02:28 AM		

- 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.

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.

		O	\times	1	Туре	Mail ref.	Excel •		Date rea	d
					-	= = (Selected Mails	HTML		-
	 Image: A start of the start of	0			LETTER	HCC-00118	08-04-20 04:19 AM	PDF		03:52 AM
1		0			LETTER	HCC-00117	05-04-20 11:18 PM		05-04-20	0 11:24 PM
1		0	\times		LETTER	HCC-00116	05-04-20 09:32 PM			
					DILTEST	00002.00	01-04-20 02:28 AM		01-04-20	0 02:28 AM

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**.

Acti	ons 💌	÷ •	Repl	y 🔻 R	eply All 🔻	Forward 👻 Mark As 💌 💽	* <u>+</u>
	0	\Join		!	в	Туре	Mail ref.
~	0					LETTER	HCC-00118
 ~	0				в	LETTER	HCC-00117
	Ø					LETTER	HCC-00116
						DILTEST	00002.00
	Ø				в	TYTEST	<u>00001.01</u>

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

Group Sul	by bject	 File type 	Include Document metadata spreadsheet	
🖌 Sel	ect all f	iles		
	Sub	ject: RE: Test		1 file [^]
		LETTER-HCC-00117.	Pdf	67 KB
				*

- 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.

From: Ref: INEIGHT0000016.00	
File names PDF - Document_Release 🔻 1	Close
Viewing tools Measure 2 3 9	
C Q Q Q/W Marquee O Fit Page ↓ ⊕ 1 / 6	

	ltem	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 dropdown menu, and then select the file name. After you have viewed the files, click **Close** to close the preview window. This page intentionally left blank.



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 <u>Outlook Integration tool</u> 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.

Actions 🔹 🔶 🔹 Reply 👻	Reply All 🔻 For	ward 👻 Mark As 👻 [
Admin •	Туре	Mail ref.
Change Status To	Closed-out	
Duplicate •	In Progress	HCC-00118
Generate Mail Hyperlink	Not Started	HCC-00117
Generate Mail Hyperlink for the Cur	Outstanding	HCC-00116
Process attachments as controlled	DILTEST	00002.00
	TYTEST	00001.01
	LETTER	HCC-00112

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.

hread		DETAILS ATTACHMENTS LINKS	
ctions • Reply • Reply all •	Forward 👻 📇 Required by: 16-04-20		
esponded: dd-MM-yy 💾 State			Cancel Save cha
	Closed-out		
	Outstanding		
	In Progress Not Started +	HCC	
	Not Started		
etter			
eference No.:	HCC-00118		
roject Title:	Training01 Project for TeamBinder		
ate:	08 April 2020, 04:19:31 AM -7:00		Response required by: 15 April 2020
):	Joe Fredericks, Houston Contracting		
	Dilshan Karunanayake, Houston Contracting		
	Alastair Cook - Company, InEight pvt ltd John Cena, JBL COMPANY		
C:	Greg Harrison, Houston Contracting		
	Bret Lee - Department, InEight pvt Itd		
rom:	Greg Harrison, Houston Contracting		
ıbject:	hgj		
rom: ubject: Nest Regards,			
Dilshan Karunanayake (LETTE)	R)		
iscipline: Contracts & Procurement riginator's Reference No.: GJHGJHGJ		Area: Area 31	Location: sdcscsdcdsc
sclaimer: is is a confidential message intended for the nam	ed recipient only. The contents herein are privileged to the sender and the use thereof i	is restricted to the intended purpose. If you have received this e-mail in error, plear	se secure its contents and reply to the sender. Thank you.

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**.

Actions 💌	Save as draft	🖶 🔹 🖿	Request read	l receipt	Cancel	Send
From:	Greg Harrison					
* To	Greg Harrison (Hou	ston Contracting) >	<			
Cc						
Bcc						
* Subject:						
	Contract No					
						-
	* Respond by	Priority:		Status:	* Orig. Ref. No.:	
	* Respond by date:	Priority: Normal		Status: Outstanding - OUTSTAND 👻	* Orig. Ref. No.:	

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

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

Select contacts to allocate	2:			Allocated:		<u>Clear</u>	alloca
Zafar Company	- Sea	rch Q		Recipients added to: To			
Name		Allocated		Name	Email	HC	
Jacob Doe			To	Greg Harrison (Houston Contracting)			Θ
John Brown							
				Recipients added to: Cc			
				Name	Email	HC	
			_	No records to display			
			Cc	No records to display			
				Recipients added to: Bcc			
				Name	Email	HC	
			_	No records to display			
			Bcc				

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**.

Actions 🔻	Save as draft 🛛 🖶 🔹 📄	quest read receipt	Cancel	Send
From:	Greg Harrison			
* To	Greg Harrison (Houston Contracting) $ imes $			
Cc				
Bcc				
* Subject:				
	Contract No			
				-
	* Respond by Priority: date:	Status:	* Orig. Ref. No.:	
	06-05			

- 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.

elect	contacts to allocate:				Allocated:		<u>Clear</u>	alloca	at
Se	arch	Q			Recipients added to: To				
	Group Id	Title	ſ		Name	Email	HC		
~	1142020-CN-0001	Package Group - (11420		→ To	Greg Harrison (Houston Contracting)			Θ	1
-	1142020-CN-0002	Package Group - (11420	14						
-	1162020-CN-0004	Package Group - (11620							
_					Recipients added to: Cc				
	124-2020-0001	Package Group - (124-2			Name	Email	HC		
	124-2020-0002	Package Group - (124-2			Name	Lindii	но		
	124-2020-0003	Package Group - (124-2		→	No records to displa	у			
	124-2020-0004	Package Group - (124-2		Сс					
	1242020-001	Package Group - (12420							
	ALLTHEFILTERC-01	Package Group - (ALLTH			Recipients added to: Bcc				
	CCCCC	Package Group - (CCCCC)			Name	Email	HC		
	CN-162020-TENDER-001	Package Group - (CN-16							
	CN-228-TENDER-0001	Package Group - (CN-22			No records to displa	у			
	CN-232020-002	Package Group - (CN-23		Bcc					
_	CN-3232020-002	Package Group - (CN-32		200					
	014-5252020-002	Package Group - (CN-32							

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.

	Filter/Sort	t		
	Actions 🔻	• •	Reply 🔻	R
	Admin		,	
	Change Sta	tus To	•	
	Duplicate		•	
	Generate M	ail Hyperlink	>	
	Generate M	ail Hyperlink	for the Cur	
	Process att	achments as	controlled	
II				

3. Click Copy link.

Mail type:	LETTER	
Subject:	hgj	
Status:	OUTSTANDING	
	ambinder.com/TeamBinder20250/Integration/tbOpenItem.aspx? ProjNo=TRAINING01&RefNo=HCC-00118&Action=EDIT	DUX-

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.

Ξ	1	ଜ	New	~	Document / Mail / Inbox 🦯	、	
>>		Υ.	Filter/Sort	t	Dashboard		
INEIGHT		Acti	ons 🝷	÷ •	Mail	Þ	Inbox
			0	×	Documents	• (Drafts
DOCUMENT					Transmittals	►	Sent items
				\bigotimes	Packages	•	Unregistered
TRAINING			0	\bigotimes	- ackages		onegistered
G PRC				\bigotimes	Tasks	•	Deleted items

- 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.

Actions 🔹 🔶 💌 Reply 🔹	Reply All 🔹 Forward 👻 Mark As 👻 🚺
Admin	Type Mail ref.
Change Status To	▼
11 Duplicate	Change Order
Generate Mail Hyperlink	Change Order Response
Generate Mail Hyperlink for the Cur	Development and Environment
Process attachments as controlled	IDF Response
	Issue Documentation Form

- 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.

Ξ	3	ଜ	New	~	Document / Mail / Inbox 🦯	、	
>>>		T	Filter/Sort	t	Dashboard		
INEIG		Acti	ons 💌	÷ •	Mail	►	Inbox
INEIGHT DOCUMENT			0	\bowtie	Documents	►	Drafts
UMEN					Transmittals	• (Sent items
T TRA				\boxtimes	Packages		Unregistered
TRAINING			0	\bigotimes	T ackages		omegiotered
g PRC				\bigotimes	Tasks	•	Deleted items

3. Click Actions and select Cancel.

Act	tions 🔹 🔶 💌	Reply 👻 🛛	Reply All 🔻 Forward
A	dmin	•	Туре
0	ancel		•
ii l c	hange Status To	•	LETTER
11 D	uplicate	•	MEMO
<u> </u> G	enerate Mail Hyperlink		LETTER
<u> </u> G	enerate Mail Hyperlink for	the Cur	LETTER
11 P	rocess attachments as co	ntrolled	DILTEST
			LETTER

4. Click Yes.



5. Enter a reason for cancelling the mail.

	vere selected to be ca on to selected items	1	s to why they are to be cancelled.		
Mail Ref	Туре	Subject	Status	Sent	* Reason
HCC-00118	LETTER	hgj	OUTSTANDING	8/04/2020 9:19:32 PM	×

- 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.

Letter to Owner - 5/12/20 From: Tyler Ellerbeck, INEIGH	IT Ref: INEIGHT-000002			
Thread		DETAILS ATTACHMENTS RECIPIENTS	LINKS	
Actions - Reply - Reply all	Forward 🔻 📇 📄 Required by: 05-	-14-20		
Responded: MM-dd-yy	Status: Outstanding 👻 Thread status:	Outstanding 👻	С	ancel Save changes
Cancelled by: Tyler Ellerbock, INEIGHT Cancelled or: 05:13:20 04:42 AM Cancelled reason: Incorrectly sent.	T ③	Cancelled	celled	
Project Title: Date: To: From: Subject:	UI Testing 13 May 2020, 04:39 25 AM +09:30 Tyler Ellerbeck, INEIGHT Tyler Ellerbeck, INEIGHT Letter to Owner - 6/12/20	911 .	Response required by: 14 May 2	020
Formal communication of a letter to the	<u></u>			
2				
Discipline: Originator's Reference No.:	10UN	Area:	Location:	

OTE	 Cancelled threads. 	mail will l	oe displa	ayed a	as gi	reye	ed (out in t	he Sent I I	ems fold	der ar	nd in mai
	Cancelled	mail will a	also be d	displa	yed	wit	:h a	wateri	mark sayi	ng cance	lled.	
		mail will r as physica vill be inval	lly attacl							-		
	cancelled	Mail.								View: System		•
	Filter/Sort	Mail.		×				Manage columns	t∃ Show: Perso			Til sent items
	Filters]		×		0	×	Manage columns Type	t≡ Show. Perso Mail ref.			
	Filter/Sort Filters Show:	Personal	•	×		0	8	5		nal Sent		Il sent items
	Filters	Personal	- Outstanding mail	×		0		Туре	Mail ref.	nal Sent	 ✓ Search al [™] Ξ 	Il sent items
	Filter/Sort Filters Show:	Personal	Outstanding mail	×		0		Type LETTER LETTER	Mail ref. HCC-000032 HCC-000031	Sent 21-05-21 01:14 Pl 19-05-21 04:59 Pl	 Search al Search al Search al 	Il sent items Q
	Filter/Sort Filters Show: Sent:	Personal All mail	Outstanding mail					Type LETTER LETTER LETTER	Mail ref. HCC-000032 HCC-000031 HCC-000030	Sent 21-05-21 01:14 PV 19-05-21 01:12 PV 18-05-21 01:12 PV	 Search al Search al Search al A A A A 	Il sent items Q Subject Appointment Appointment Appointment
	FilterSort Filters Show: Sent: To:	Personal All mail	Outstanding mail	•				Type LETTER LETTER	Mail ref. HCC-000032 HCC-000031	Sent 21-05-21 01:14 Pl 19-05-21 04:59 Pl	 Search al Search al M M M M M 	Il sent items Q Subject ^ Appointment Appointment

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.

Actions 👻 💽 💌	<u>+</u>	
Admin •	Ø	Туре
Change Status To		•
Delete		со
Duplicate		RFI
Generate Mail Hyperlink		RFI
		MEMO

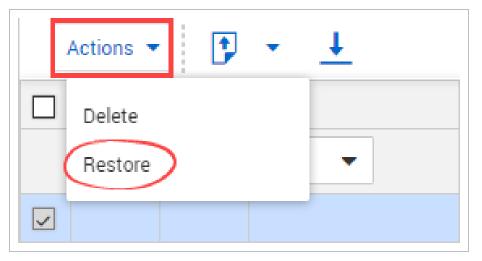
3. Click Yes.

2.8.2 To restore deleted mail:

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

Ξ	3	ធ	New	~	Document / Mail / Inbox 🦯		
*		T 1	Filter/Sort	t	Dashboard		
INEIGH	INEIGHT DOCUMENT TRAINING	Acti	ons 🝷	÷	Mail	•	Inbox
HT DOC			0	×	Documents	►	Drafts
UMEN					Transmittals	►	Sent items
			0		Packages	►	Unregistered
IING PRC			U		Tasks	۲ (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

	Actio	ons 💌	+ •	Repl	y 🔻 R	eply All 🔻	Forward 👻 Mark As 👻 🚺
		0	\bowtie		!	Туре	Memorandum
						•	
						MEMO	INEIGHT-000006
11						MEMO	INEIGHT-000004
			赵			MEMO	INEIGHT-000003

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

From:	: Daniel Gielb									
	Daniel Gielb (INEIGHT) $ imes$									
Bcc										
Subject:	: FW:									
	Respond by date:		Priority:		Status:			Orig. Ref. No.:		
	MM-dd-yy	—	Low	🔥 Mail BulkForw	ard	×	~	[ORIG RE123F NO]		
	Discipline:			Send status of forwarded			Location:			
	Select a discipline		¥		Comments		Select a location		×	
	Attach a copy of the mail as 💿 HTML	O PDF		Mail Reference No INEIGHT-000007	Mail sent successfully.	A				
				INEIGHT-000008	Mail sent successfully.	- 11			P	lain T
ORMAT		=			nun och obocononj.	Ψ				
						Ok				
ail Test										
ooter:	Select a footer 🛛 👻									

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.

			;
Admin	•	Туре	Mail ref.
Cancel		•	=
Change Status To	•	LETTER	HCC-00118
Duplicate	•	MEMO	HCC-00199
Generate Mail Hyperlink		LETTER	HCC-00117
Generate Mail Hyperlink	for the Cur	LETTER	HCC-00116
Process attachments as	controlled	DILTEST	00004.00
		LETTER	HCC-00115

3. Click Attach as PDF file.

🔥 Attach as PDF file?	\times							
Attaching the mail as a PDF will allow the mail to be visible in the 'Select attachments to process' dialog. Do you want to attach the selected mail as a PDF file?								
Remember this setting for future								
Ticking the checkbox will update user preferences								
Cancel Attach as PDF file Do not attac	h							

4. Select how you want to process the attachments.

_		as an individual document with its attachments]
) Pr	ocess each mail	attachment as a single document	
	Mail	Zip attachments	_ ^
\checkmark	hgj		
	LETTER-H	CC-00118.Pdf	
	✓ hgj.Pdf		T.
			-

5. Select the attachments you want to process.

	-	u wish to process them below. I as an individual document with its attachments	٦
		l attachment as a single document	
	Mail	Zip attachments	-
~	hgj		1
	LETTER-H	ICC-00118.Pdf	
	✓ hgj.Pdf		

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

-	new rows 🔶 🙁 🚹 👻 📑 👻	Get attributes 💌							Car	ncel Valio	late	Save
▲	Files	* Document No.	* Title	* Revision		* Status		* Discipline		* Туре	•	Category
	LETTER-HCC-00118.Pdf X	Document12	Title	Revision A - A	•	Issued for Info	•	Administr	•	Report - RE	• A	Atrium - A
	LETTER-HCC-00118.Pdf X	Document12	Title	Revision A - A	•	Issued for Info	•	Administr	•	Report - RE	~ A	Atrium - A

- 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.

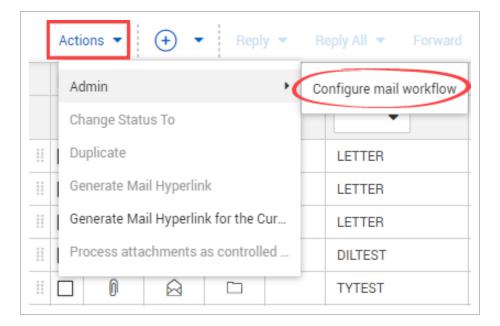
3.2 Step by Step 1 — Configure a new mail workflow

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.

* Mail type	* Mail Type Title	Base Template	_
			+
 Enable File attachments 			
Available in TenderDocs			
Response mail type only. Do no	ot show in New Mail menu		
Carry forward Orig. Ref No whe	en Replying / Forwarding the mail		
 Allow users to modify the Orig. 	Ref No		
Single Mail Reference Number	with Response / Forward Counter	s	
Default Response period (days):	Forward mail with Mail Types	Reply to mail with Mail Types	
0	Select some items	Select some items	

- 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**.

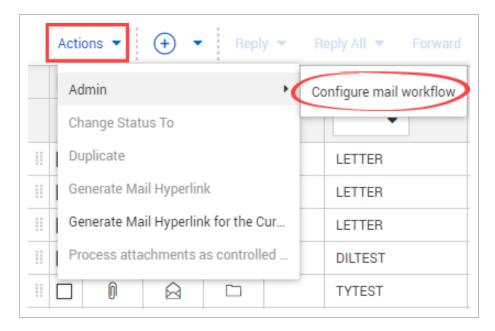
NOTE New mail types can be further customized if required by InEight.

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.

Ð	🛞 📇								Sea	rch all Mail Type
	Mail Type	Title	Mail Resp Days	Fwd Type	Reply Type	Enable File Attachmen	Mandatory Recipients	Allow Single Mail Refe	Available in TenderDocs	Attribute Values
	20200312	20200312	5	ANY	ANY					Define Attribute Valu
	<u>AA@</u>	aa@	10	ANY	ANY		Ľ			Define Attribute Valu
	API	API	0	ANY	ANY	•	Z	×		Define Attribute Valu
	BASETEST	Base Temp Test	0	RFI	RFI-R					Define Attribute Valu
	<u>co</u>	Change Order	0	MEMO	LETTER					Define Attribute Valu
	<u>CO-R</u>	Change Order Respo	0	ANY	ANY	•				Define Attribute Valu
	<u>D&E</u>	Development and En	10	ANY	ANY			×		Define Attribute Valu
	DILTEST	DIL's Test	2	ANY	ANY					Define Attribute Valu
	IDF-R	IDF Response	0	ANY	ANY					Define Attribute Valu
	IDF	Issue Documentatio	0	ANY	ANY					Define Attribute Valu
	LETTER	Letter	5	DILTEST, LETTER, TY	ANY					Define Attribute Valu
	LIVE	Live Mail	0	ANY	ANY					Define Attribute Valu
	MEMO	Memorandum	0	MEMO	MEMO					Define Attribute Valu
	NCR	Non Conformance R	0	ANY	ANY					Define Attribute Valu
	NOA	Notice of Action	0	N/A	ANY					Define Attribute Valu
	NOD	Notice of Delay	0	ANY	ANY					Define Attribute Valu
Ite	ms: 34									

- 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.

Selection area:								
🖲 Project 💿 Company 💿 F	Personal							
Display: All contacts Contact 	groups							
rojects				1 favorite minimum, 20 favorites maximum		<u>Clear</u>	alloca	ate
19.1 Company 💌 😒	Search	Q		Recipients added to: To				
Name	Allocate	d	→	Name	Email	HC		
	Allocate	u 	То	Duptest Test (Houston Contracting)	\checkmark		Θ	-
				Recipients added to: Cc				
				Name	Email	HC		
			→	Daniel Gielb (Houston Contracting)			Θ	-
			Cc					
				Recipients added to: Bcc				
				Name	Email	HC		
			→ Bcc	No records to displa	у			-
			DUU					,

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**.

Actions 💌	Save as draft 🛛 🖶 👻 📘 Confidential	F	Request read receipt					Cancel Send
	Greg Harrison							Send & close-out
* То	Greg Harrison (Houston Contracting) ×							Send for review
Cc								
Bcc								
* Subject:								
	Contract No							
	Contract No							
	* Respond by date: 24-04-20		Priority:	v	Status: Outstanding - OUTSTANDING	~	* Orig. Ref. No.:	
			Normal		Outstanding - OUTSTANDING			
	* Discipline:			* Area:		* Location:		
	Select a discipline		*	Select an area	Ŧ	Select a location		Ŧ
	Attach a copy of the mail as O HTML PDF							
	Text input:							
	Select text to insert							Ψ.
	Replace text Insert at top Insert text							Plain
	- B I U ≣ ≅ ≣ :	=	=					
FORMAT		-						
FORMAT								
FORMAT								
FORMAT								
FORMAT								
FORMAT								
FORMAT								

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.

*Reviewer: 🔘 Users	○ Roles			
				•
*Due by:				
dd-mm-yy			Ē	÷
				//

- 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.

Thread			DETA	ILS ATTA	CHMENTS	LINKS
Daniel Gielb	MEMO INEIGHT-000003	Actions 🔻 Reply 🔻	Reply all 🔻 Forward	- 🖶 🖿		
> 05-28-20		Responded: MM-dd-y	ry 🛗 Status: Ou	tstanding 🚽	Thread status:	Closed-out
🖶 1 🔋 O	▲ OUTSTANDING				_	
Daniel Gielb	MEMO INEIGHT-000007					
→ 07-22-20	INEIGHT-000007					
🖶 1 🔋 O	▲ OUTSTANDING	INEI	G H T 🛞			
 ➡ 1 0 0 Daniel Gielb INEIGHT 05-28-20 	OUTSTANDING MEMO INEIGHT-000004	Memorand				
Daniel Gielb INEIGHT	MEMO	Memorand Reference No.:	Ium			
Daniel Gielb INEIGHT 05-28-20 🗮 1 🛛 0	MEMO INEIGHT-000004	Memorand	lum			
Daniel Gielb INEIGHT 05-28-20	MEMO INEIGHT-000004	Memorand Reference No.:	Ium			
Daniel Gielb INEIGHT 05-28-20 1 0 0 Daniel Gielb INEIGHT	MEMO INEIGHT-000004	Memorand Reference No.: Project Title:	IUM INEIGHT-000003 UI Testing	4:36 AM +09:30		
Daniel Gielb INEIGHT 05-28-20 1 0 0 Daniel Gielb INEIGHT 07-22-20	MEMO INEIGHT-000004 OUTSTANDING MEMO INEIGHT-000008	Memorand Reference No.: Project Title: Date:	IUM INEIGHT-000003 UI Testing 28 May 2020, 03:1	4:36 AM +09:30 GHT		

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.

Ξ	Ξ	ଜ	New	~	Document / Mail / Inbox 🦯	`	
>>		T	Filter/Sort	t	Dashboard		
INEIGH		Acti	ons 💌	÷ •	Mail	►	Inbox
HT DOC			0	\bowtie	Documents	►	Drafts
INEIGHT DOCUMENT					Transmittals	►	Sent items
T TR/				\boxtimes	Packages	. (Unregistered
TRAINING			0	\bigotimes			onregistered
G PRC				\bigotimes	Tasks	۱.	Deleted items

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

lect contacts to allocat	e:					Allocated:		<u>Clear</u>	alloca	at
Zafar Company	-	Search		Q		Recipients added to: To				
Name			Allocated			Name	Email	HC		
Jacob Doe			Allocated	_	→ To	Greg Harrison (Houston Contracting)			Θ	
John Brown					ш					
						Recipients added to: Cc				
						Name	Email	HC		
					→ Cc	No records to dis	splay			
					00					
						Recipients added to: Bcc				
						Name	Email	HC		
						Name	Lindi	no		+
						No records to dis	splay			
					-					
					Bcc					

5. Enter the mail details.

	-					0	0
• •	•					Cancel	Send
From							
то	Greg Harrison (Houston Contracting) $ imes $						
Co							
сс							
ubject:	Re: Notification of Package Issue. Reason: Issued for Printing						
* Type:	Select a mail type 🖤						
	* Respond by date:	Priority.		Status:	*	Orig. Ref. No.:	
	dd-MM-yy	Normal		•	-		
	* Discipline:						
	Select a discipline mail received:	Fitwate com- on 2010-08-20	Area: Select an area	▼	* Location: Select a location		Ŧ
	Select a discipline		Select an area		Select a location		-
mail ite	Select a discipline nall received : m is received via EMAIL from zafar@qa-software.com-zafar@qa-sof	ftware.com> on 2019-08-30	Select an area		Select a location		-
	Select a discipline nall received : m is received via EMAIL from zafar@qa-software.com-zafar@qa-sof		Select an area		Select a location		
mail ite RMAT m: zafa Greg H	Select a discipline nall received : m is received via EMAIL from zafar@qa-software.com-zafar@qa-sof	ftware.com> on 2019-08-30	Select an area		Select a location		Plain
mail ite RMAT m: zafa t: Frida Greg H ject: R nk you 03:10c	Select a discipline mail received. ms received with EAAAL from zafar@ga software.com-zafar@ga software.com w B I U E E E E E E Ms ga software.com Ms ga software.com Ms ga software.com Ms ga software.com	ttware.com> on 2019-08-30	Select an area	nteen of Houston Contracting on 2020-04-10-4 50-30 AM +10 k	Select a location	m MEXPR01M81734.ausprd01.prod.outlook.com	Plain
mail ite RMAT m: zafa t: Frida Greg H oject: R ink you 03:10c	Select a discipline nal received in is received with DAAL from zafar@pas.edhware.com-zafar@pas.edh B I U E E E E E E reflaga.software.com yo Jakupust 2019 03:34-42 PM tarrison reflaga.software.com reflaga	ttware.com> on 2019-08-30	Select an area	nteen of Houston Contracting on 2020-04-10-4 50-30 AM +10 k	Select a location	m MEXPR01M81734.ausprd01.pred.outlook.com	Plain

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.

CLASSIC-20200421-0 From: Greg Harrison,	001 , Houston Contracting Ref: 0	0007.00					
Thread	DETAILS	ATTACHMENTS RECIPIENTS	LINKS				
Mail (1)	• 						Close
Mail (1)	Mail ref.	Subject	Mailbox	Туре	Date	Status	From
	HCC-00118	hgj	Mail	LETT	08-04-20	0UT	Greg Harris
	4						Þ
	Items: 1						
© 2020 InEight Inc. <u>v 19.2</u>						1	NEIGHT

3. Click the **plus icon**.

Thread	DETAILS	ATTACHMENTS	RECIPIENTS	LINKS				
fail (1)	• •							Close
iaii (1)	Mail ref.	Subject		Mailbox	Туре	Date	Status	From
	HCC-00118	hgj		Mail	LETT	08-04-20	OUT	Greg Harri

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

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

Se	arch criteria for	Mail - Inbo	x -							Selected work items to	link	
Sh	iow:			Responses:				^ ^		D ID	Title	Module
F	Personal		v	All mail New mail Outstanding mail						HCC-00118	hgj	Mail
То				From:								
			v	All companies				*				
			Ψ									
Fil	ter by: Colu	mn	Operator Value					-				
	,						Clear	Search				
Se	arch results											
	Mail ref.	Received	Subject	То	From	From comp	bany	Status				
	HCC-00118	08-04-20	hgj	Greg Harrison	Greg Harrison	Houston Co	ontracting	OUTSTAN *	→			
~	HCC-00117	05-04-20	RE: Test	Greg Harrison	Greg Harrison	Houston Co	ontracting	OUTSTAN	-			
	HCC-00116	05-04-20	777	Greg Harrison	Greg Harrison	Houston Co	ontracting	OUTSTAN				
	00002.00	01-04-20	DIL-20200401-002	Greg Harrison	Alastair Cook - Co	InEight pvt	ltd	OUTSTAN				
	00001.01	31-03-20	RE: 111111111111111111111111111111111111	Greg Harrison	Dilshan Karunana	Houston Co	ontracting	OUTSTAN				
	HCC-00112	31-03-20	RE: DIL-20200331-001	Greg Harrison	Dilshan Karunana	Houston Co	ontracting	OUTSTAN				
	HCC-000003	27-03-20	FW: DIL-20200327-001	Greg Harrison	Dilshan Karunana	Houston Co	ontracting	OUTSTAN				
	HCC-000001	27-03-20	FW: 20200306	Greg Harrison	Dilshan Karunana	Houston Co	ontracting	OUTSTAN				
	HCC-000003	27-03-20	RE: 20200306	Greg Harrison	Dilshan Karunana	Houston Co	ontracting	OUTSTAN				
	HCC-000106	25-03-20	DIL-20200326-003 HIGH	Greg Harrison	Greg Harrison	Houston Co	ontracting	OUTSTAN				
	HCC-000001	25-03-20	DIL-20200326-002	Greg Harrison	Greg Harrison	Houston Co	ontracting	OUTSTAN				
	HCC-000105	25-03-20	DIL-20200326-001	Greg Harrison	Greg Harrison	Houston Co	ontracting	OUTSTAN				
		25-03-20	DIL-20200325-004	Greg Harrison	Grea Harrison	Houston Co	ontracting	OUTSTAN *				

6. Click Save.

- 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.