DOCUMENT DRIVE USER GUIDE

Document Drive

Release 23.12
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CONTENTS

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CHAPTER 1 – USING THE DOCUMENTS REGISTER

The Documents Register contains all the documents uploaded by your company on the project. By default, only the latest released revisions of documents are visible.

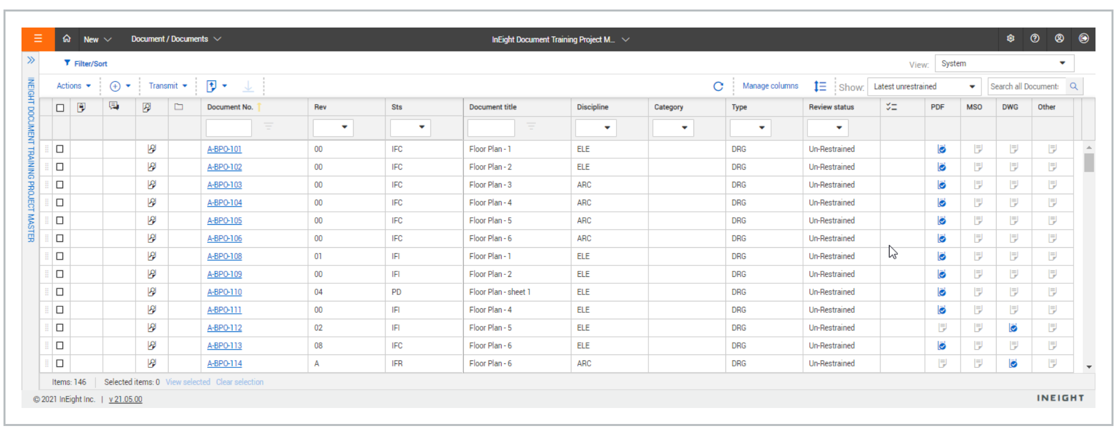
See the links below for information on common tasks you can perform from the Documents Register.

InEight U — Online Training : You must be signed in to access the related course link below.

Document Register Essentials Course

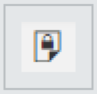
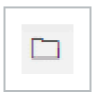
1.1 VIEWING THE DOCUMENTS REGISTER

The Documents Register is made up of columns that describe the details of each document. You can also add custom fields to the Register view by clicking **Manage columns**.



See the table below for a description of each Register column.

Column	Description
Padlock Icon	A padlock icon indicates that the document has been checked out. A red exclamation mark icon shows when

Column	Description
	Bluebeam consolidation has failed. Document continues to attempt consolidation.
Comment Icon 	A blue comment icon indicates there are text comments available for the document. A red comment icon indicates there are outstanding text comments for the document.
View Icon 	A magnifying glass icon indicates there is a preview available for the document.
Folder Icon 	A folder icon indicates that the document is in a folder.
Document No.	The unique identifier for the document.
Rev (Revision)	The revision of the document.
Sts (Status)	The status of the document. This controls whether the document is restrained (needs to be reviewed) or un-restrained (can be released immediately).
Document title	The description of the document.
Discipline	The discipline of the document. Documents can be grouped by disciple (e.g. Structural, Electrical or Mechanical).
Category	The category of the document. Documents can be grouped by category (e.g. Main Building, Carpark, Atrium).
Type	The type of the document. Documents can be grouped by type (e.g. Drawing,

Column	Description
	Report, Manual).
Review status	The status of the document's review process (e.g. Released, Un-restrained).
DWG, PDF, DOC and OTHER	The formats the document is available in for download.

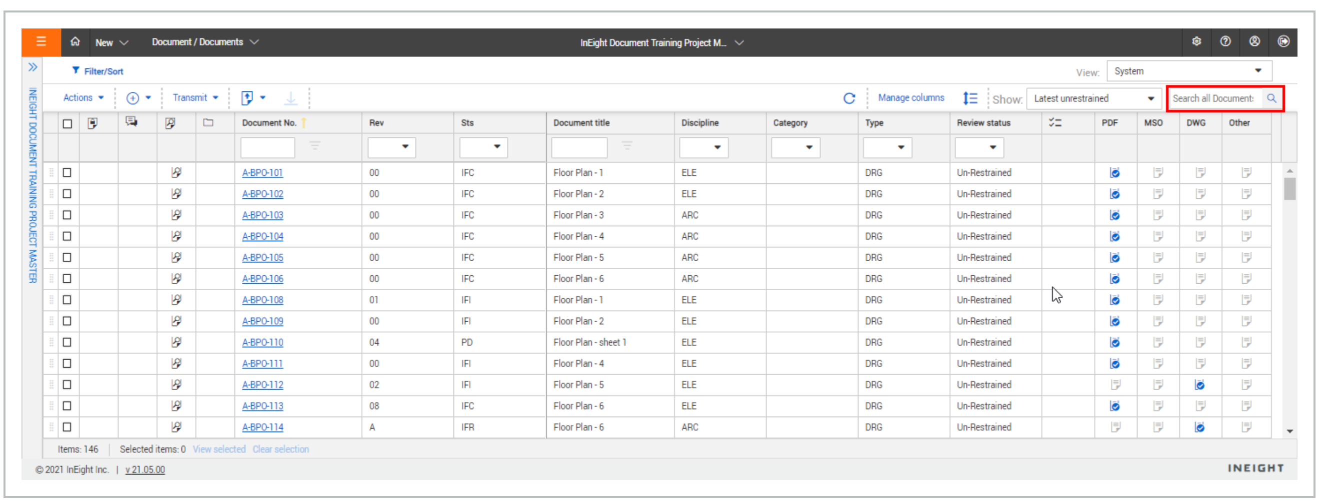
To select a document in the Register, select the document's check box on the left side of the screen. To select all documents in the register, click **Select all** at the bottom of the page. This feature is available when there are 1000 or fewer entries in the register results. The option is disabled when there are more than 1000 entries. 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.

To open a document, click the document number or double click the row of the document. The document opens to the details page or in the viewer, depending on your user preferences.

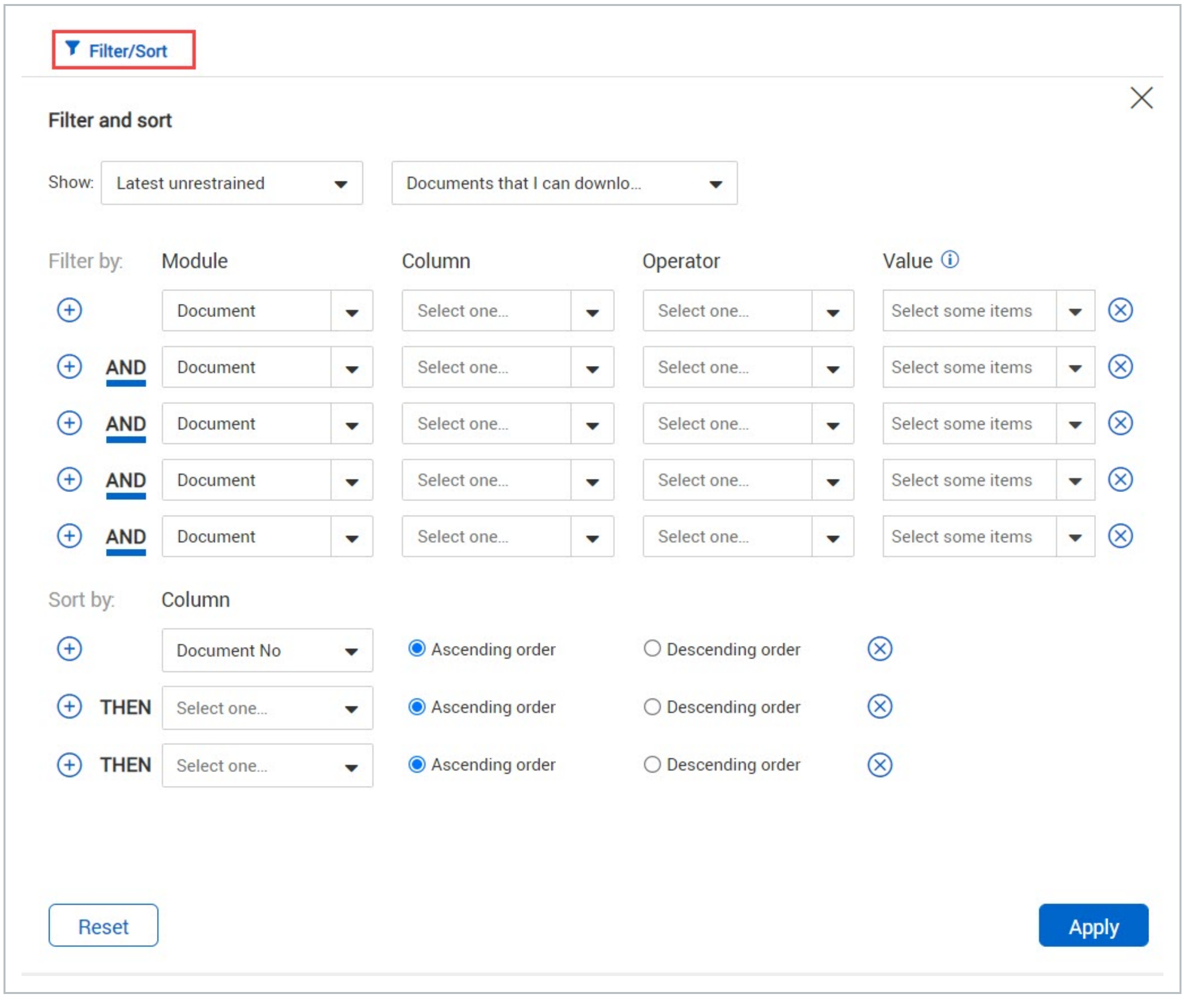
1.2 SEARCHING FOR DOCUMENTS

There are several ways to search for documents in the Documents Register.

Simple search – Enter key words in the search box above the Register. The Register will display documents with those key words.



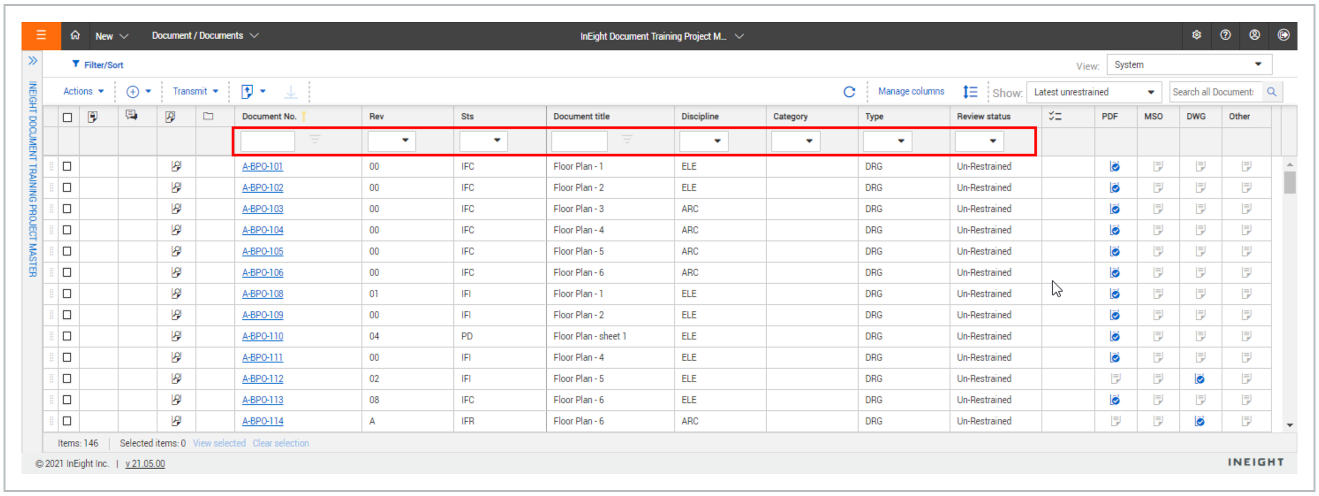
Filter and sort – Click **Filter/Sort** to select filters for your search. Click **Apply** to apply the search filters.



For projects using the Vendor data module, you can filter the register based on metadata of a linked deliverable or purchased item. The metadata fields do not show in the register, but you can enter them in the filter criteria. The Module column lets you identify whether the filter is for a document, deliverable item, or purchased item. You can then enter a value representing the deliverable or purchased item. When you click **Apply**, all the documents linked to the corresponding deliverables or purchased items are shown.

The Column column lets you filter by a column in the register or a link type, such as Mail.

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

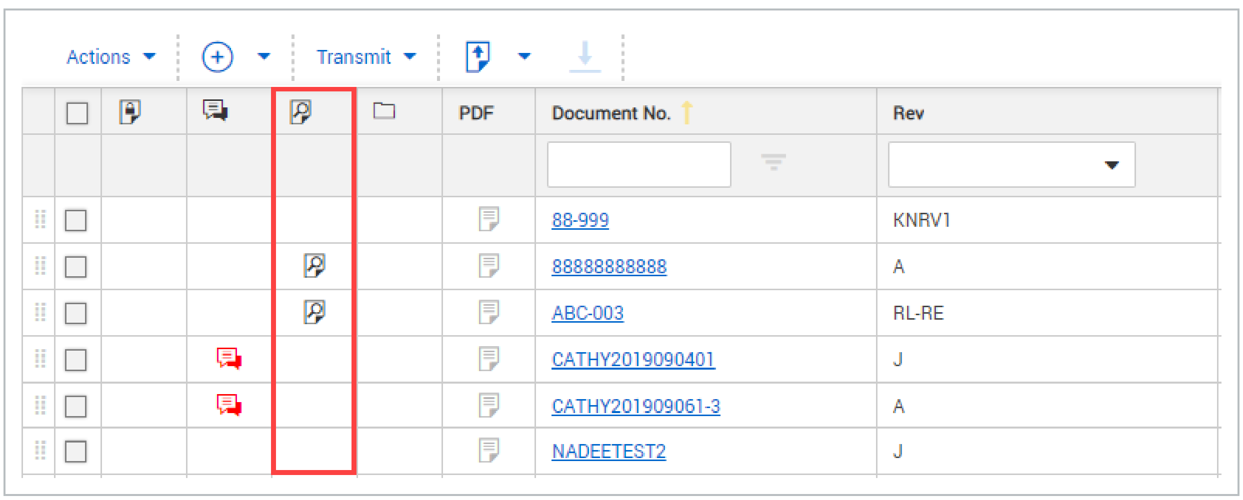


1.3 VIEWING DOCUMENTS WITH FILE VIEWER

Documents you have access to can either be downloaded or viewed online using File Viewer. File Viewer is a web-based application that renders the document via your browser and can also be used to mark up documents.

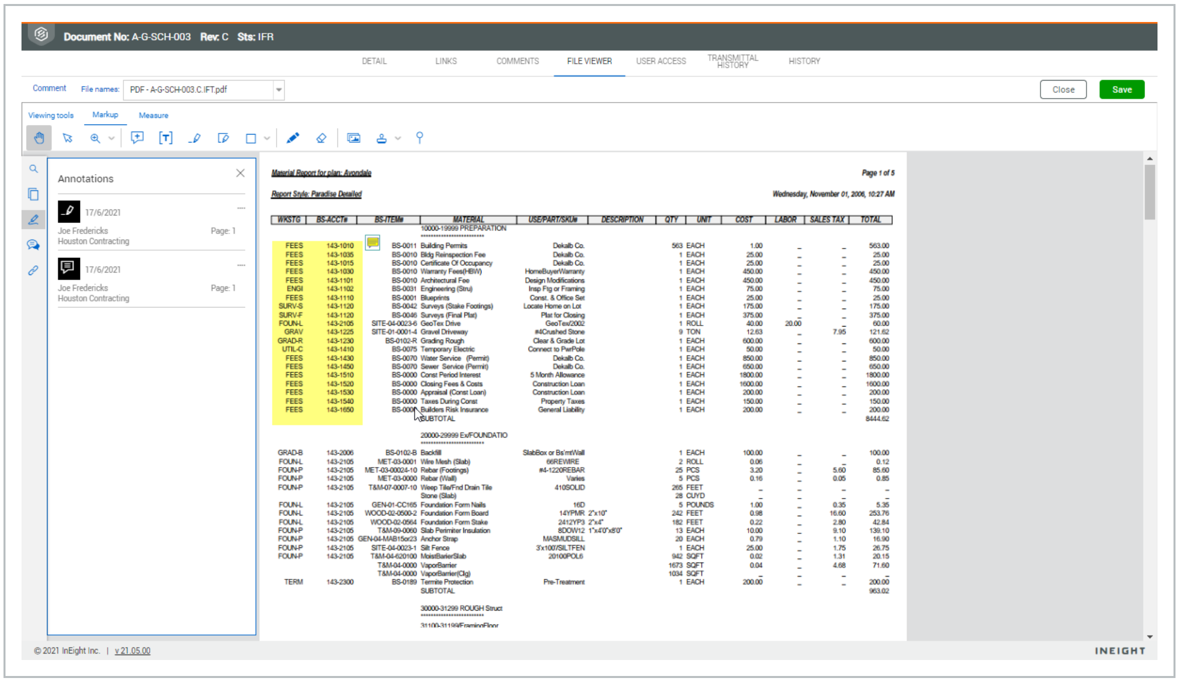
1.3.1 TO VIEW A DOCUMENT USING FILE VIEWER:

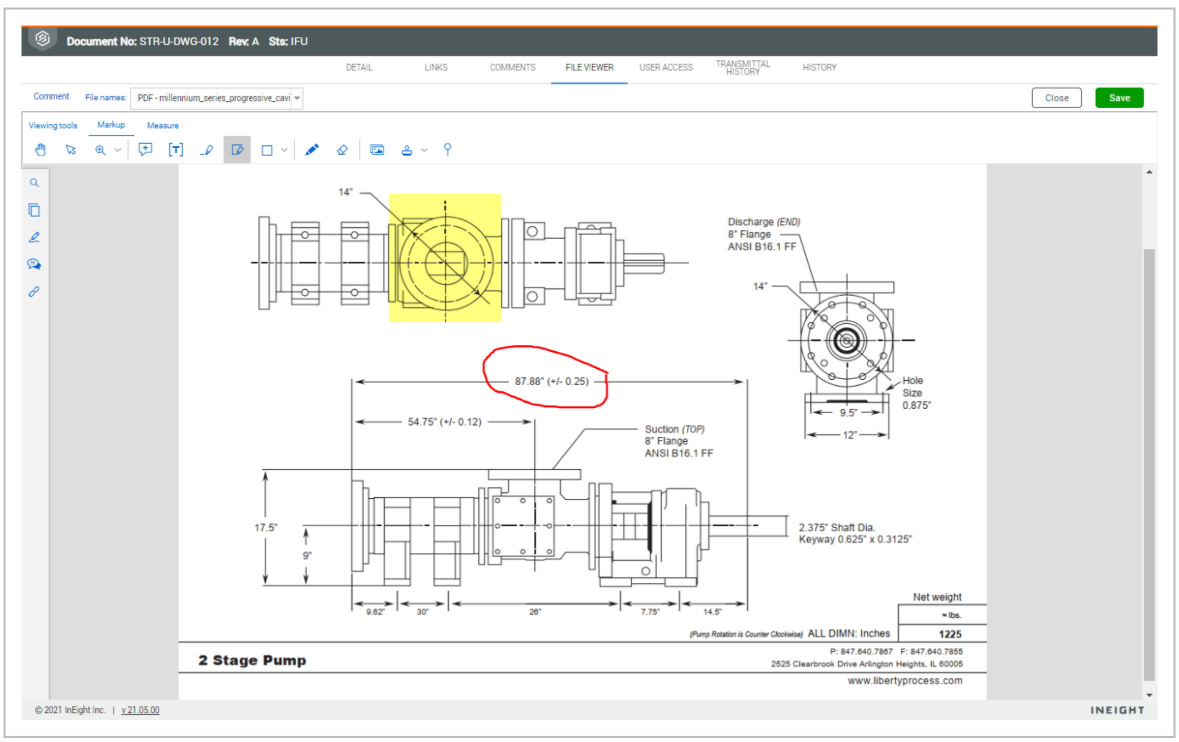
1. Click the **view icon** to load the document in File Viewer.



2. The viewer contains a number of options to **annotate**, **measure** or **view the document**. In the left menu, you will be able to see annotations made by reviewers and also toggle user layers as necessary.

New File Viewer (version 21.05)





NOTE If you want to view different details of the document, click the tabs to navigate between screens.

1.4 VIEW PDFS WITH PDF VIEWER

When you open a PDF for viewing, the PDF viewer opens. The PDF viewer is a web-based application that renders the document using your browser and can also be used to mark up documents. You can also view non-macro enabled Microsoft Office files, such as those with .docx or .xlsx extensions, and macro enabled files, such as those with .docm or .xlsm extensions.

Download PDF Viewer Quick Guide

VIEW A DOCUMENT FROM THE DOCUMENT REGISTER

When you select a PDF from the document register, the document opens with the PDF viewer. The PDF viewer provides you with tools to search file text, view, and manage comments and annotations, and view links.

The PDF viewer is available for projects that started with Document release 21.5. The viewer also opens when you select a PDF document from anywhere within Document for viewing.

1. Locate the document in the Document register or dashboard tile. A blue icon in the PDF column indicates a PDF that you can access.
2. Click the **View** icon to load the document in PDF Viewer.

   The PDF image is shown in a new browser window.

You can view the document, search for text, view and manage comments, add and view links, and add and manage annotations.

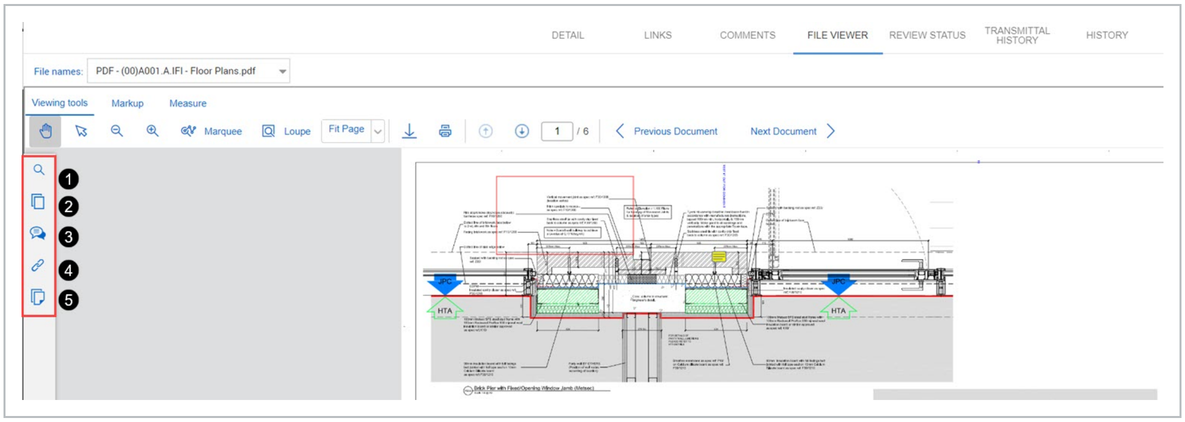
Download PDF Viewer Quick Guide

1.5 PDF VIEWER TOOLBARS

The PDF viewer has toolbars for managing annotations, viewing, markups, and measuring.

1.5.1 ORGANIZATION TOOLS

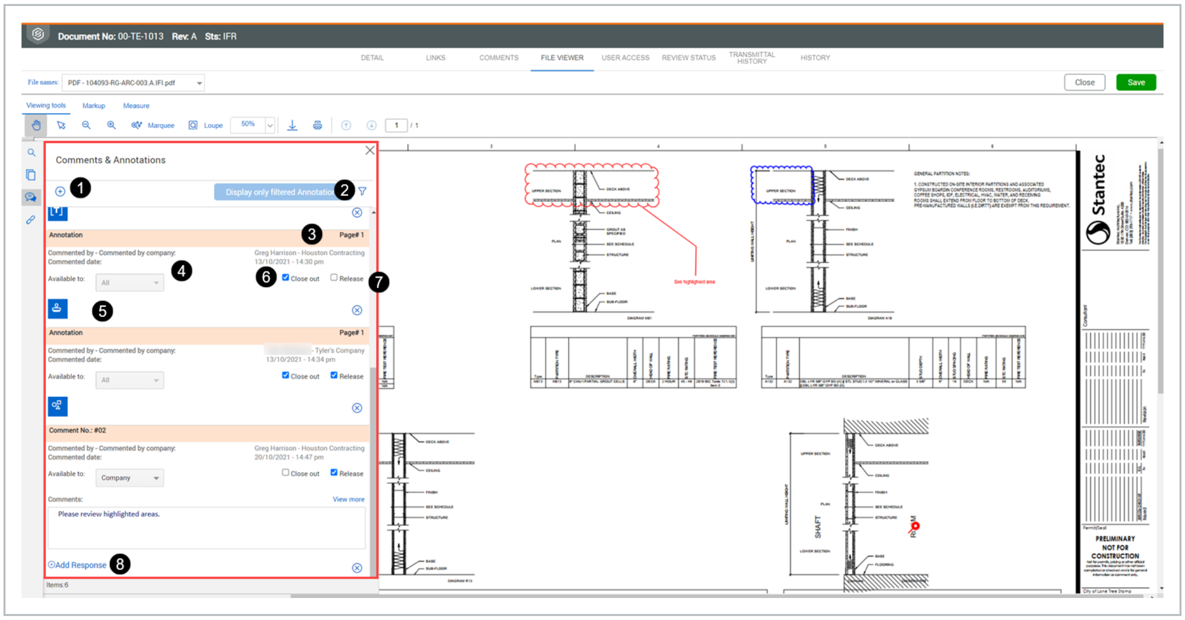
The left side toolbar gives you tools to help you keep track of the annotations, comments, and links. You can also search for text or view thumbnails of the PDF. The toolbar is shown on all tabs of the PDF viewer.



Item number	Name	Use
1	Search tool	Search for text in the document. Use this tool for documents with searchable text. Click the search result to see the text highlighted in the document.
2	Thumbnail	View a thumbnail of each page of the document. You can scroll through the thumbnails and click to go directly to that page.
3	Comments	View comments and annotations, such as notes, shapes, pencil lines, and stamps, associated with the document. You can also create new comments or respond to existing comments. The annotations include the user name, company, date created, and the page number. Click on an annotation in the list to see the location of the annotation on the page.
4	Links	View a list of links associated with the document. You can click a link to open the specified item.
5	Documents	View a table of contents of all documents in the register. You can select a document from the list and open it in the current window instead of going back to the Documents register to open it.

1.5.1.1 COMMENTS & ANNOTATIONS PANE

The Comments & Annotations pane lets you see all comments and annotations that were added to the document.

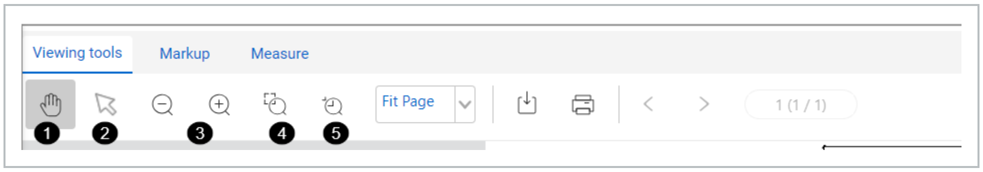


Item number	Name	Use
1	New Comment	Lets you add a new comment to the document.
2	Filter	Lets you filter and sort comments and annotations in the list. You can filter by module, such as Mail or Transmittals, and some high-level data in the module. When you filter annotations, the filtering is also applied to the markups in the viewer. Only the annotations that meet the filter criteria are shown in the viewer.
3	Page number	The page where the annotation can be found.
4	Comment information	Lets you see the name of the commenter, their company, the commented date, and the available to option.
5	Annotation indicator	The icon shows you the type of annotation. Click the annotation to see it highlighted in the document.
6	Close out	Lets you close out the comment or annotation.
7	Release	If you are the review coordinator, this check box is shown. Check this box to release the comment or annotation.
8	Add response	Lets you add a response to a comment.

When you click an annotation in the pane, the annotation in the file is highlighted. You can also click an annotation in the file, and it is highlighted in the annotation pane.

1.5.2 VIEWING TOOLS TAB

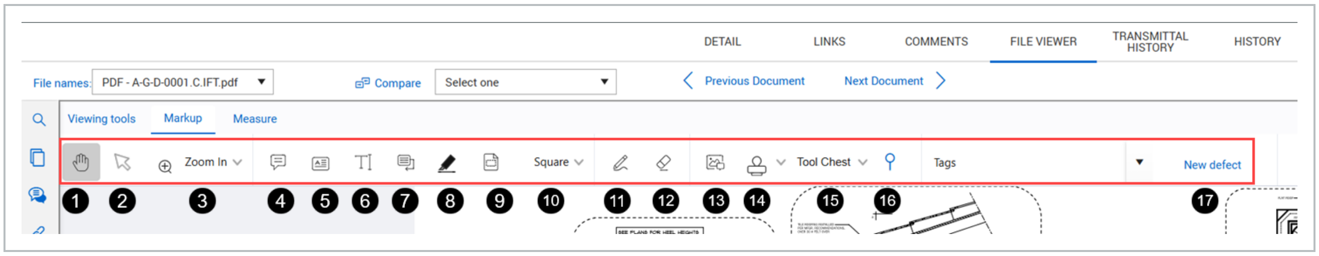
The tools in the Viewing tools tab toolbar let you customize how you view the PDF.



Item number	Name	Use
1	Pan hand	Click and drag to move a large drawing around in the viewing area.
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.
4	Marquee	Magnify an area of the page. Use the pan hand tool to move the page in the viewer. Use the Zoom out tool to return to the original size.
5	Loupe	View a magnified area of the page by hovering over it.

1.5.3 MARKUP TAB

Tools on the Markup tab let you add text and other annotations to the PDF. When the Automatically save document markups setting (Settings > Project settings> Document > **Comment**) is enabled, your markups are saved automatically. If the setting is disabled, you must save any markups you make before closing the file. Save prompts are shown when windows, such as the Details page, are closed or when closing the viewer tab to ensure that you save all markups.



Item number	Name	Use
1	Pan hand	Click and drag to move around a large drawing. You can use the pan hand to click on an annotation to open a formatting slide-out panel. You can then click the **Apply** button to apply the formats and close the panel.
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.
4	Note	Add a note to the PDF page.
5	Text box	Add a text box on the PDF page. Text added to a text box is shown in the Comments field of the annotation in the Comments & Annotations pane. It is also shown as a comment in the document's Comments register.
6	Typewriter	Add text without a text box around it. The text shows in the Comments & Annotations panel as comments.
7	Callout	Add a text box with an arrow, so you can add text and point to an area of the document with a single tool. You can right-click the callout to access the callout properties, where you can adjust the appearance and font of the text box.
8	Highlight	Highlight text on the PDF page.
9	Area highlight	Draw a highlight box.
10	Shape	Draw a shape, such as a square, circle, or line.
11	Pencil	Draw a pencil line.
12	Eraser	Erase a pencil line.

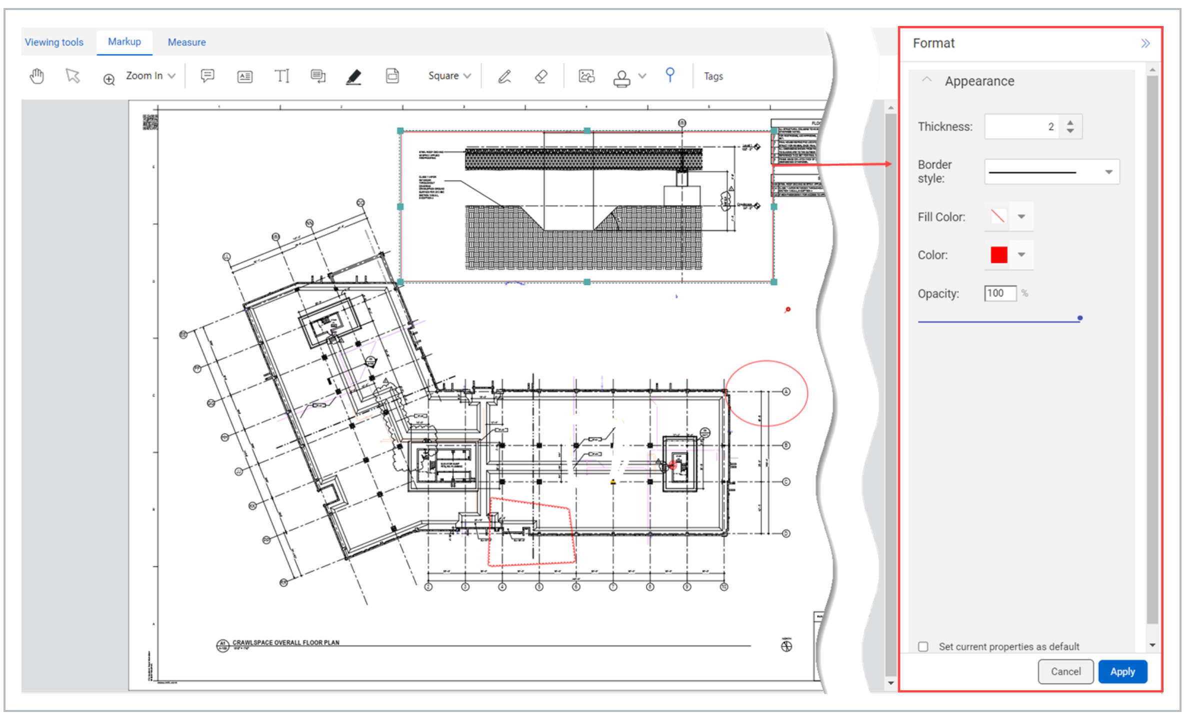
Item number	Name	Use
13	Image	Insert a saved image.
14	Stamp	Add a stamp, such as one that shows approval or rejection.
15	Tool chest	Insert or manage custom annotations.
16	Pin	Place a marker (pin) to an area of the PDF page.
17	New defect	Pin a defect to the drawing.

You can use the Ctrl-C and Ctrl-V keyboard shortcuts to copy and paste a markup. Copy and paste is supported in the same file or across files.

Text added to any markup, including notes and shapes shows in the Comments tab. You can click the **Add response** icon for the comment in the Comments tab to respond to the annotation comment.

1.5.3.2 FORMAT MARKUPS

When you add a note, highlight, or shape, the Format slide-out panel opens, so you can change the color and opacity. You can then click the **Apply** button to apply the formats and close the panel.



For other markups, you can use the pan hand to click the markup to open the Format slide-out panel, where you can change the appearance. You can then click the **Apply** button to apply the formats and close the panel.

1.5.3.3 CUSTOM TOOL CHEST

You can use the tool chest to create a library of custom stamps and annotations at the personal, company, or project level. You can group markups to create custom annotations or import custom stamps.

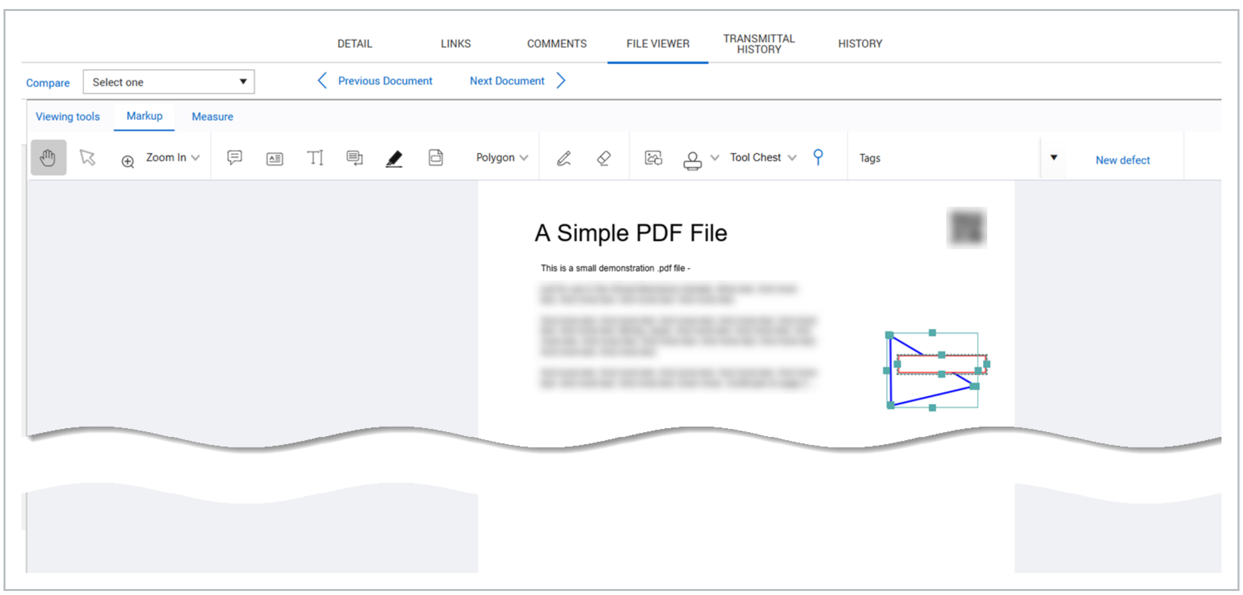
If you have requested a new stamp via a customization, it is automatically added to the tool chest.

CREATE A CUSTOM ANNOTATION FOR THE TOOL CHEST

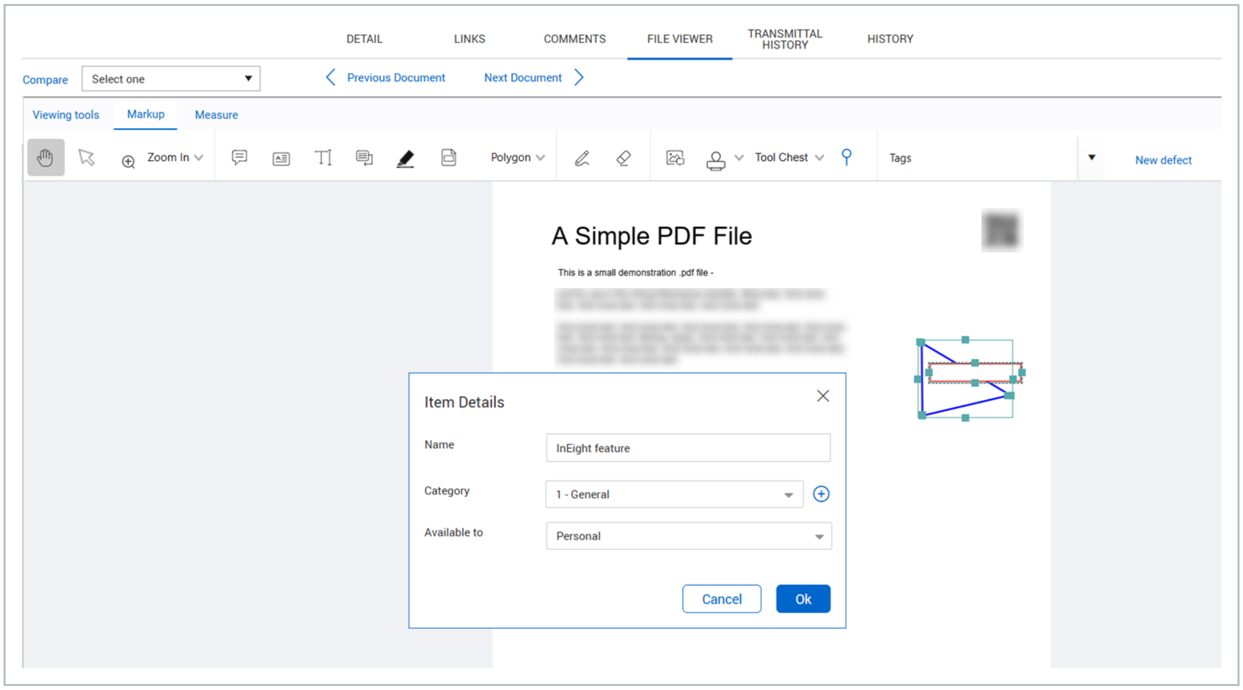
Summary: Create a custom annotation and add it to the tool chest when you frequently group multiple markups together, and you want to save them as a single annotation for future use. You can also use the tool chest when you want to save the formatting for a single annotation, such as a font or color, so you do not have to apply formatting each time you use the annotation.

Considerations: You can create custom annotations while using the viewer.

1. In the viewer, use the markup tools to add multiple shapes to a document, and then select them.



2. Right-click the grouped annotation, and then select **Add to Tool Chest**. The Item Details dialog box opens.



3. Enter the name of the annotation, the category, and the availability (Personal, Company, or Project) of the item, and then click **Ok**. The item is saved to the tool chest.

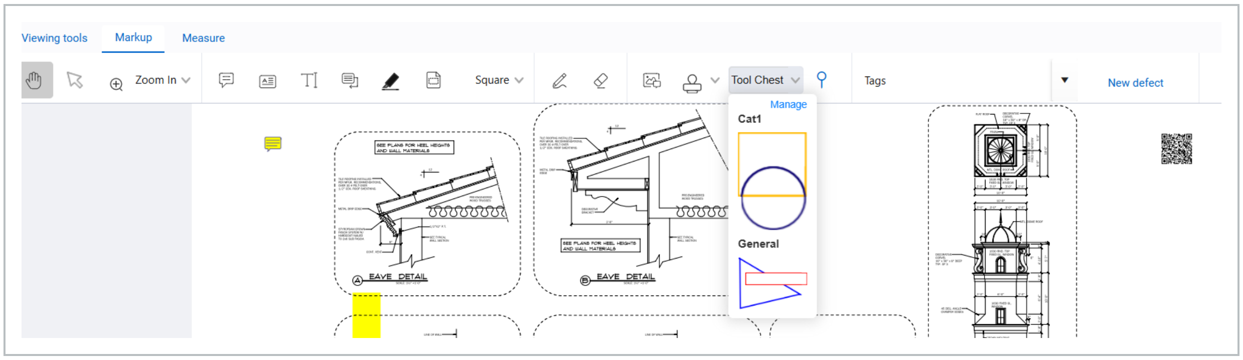
What's next: You can open the tool chest and select your annotation instead of having to recreate it. If you saved the tool with Company or Project availability, the annotation is available in other users' tool chests.

1.5 STEP BY STEP 1 – USE A CUSTOM ANNOTATION OR STAMP

Summary: Mark up a document with a custom annotation or stamp.

Considerations: The annotation or stamp must have already been added to the Tool Chest. While a custom annotation is added to the page as a unit, you must select each part if you want to move it or apply options from the context menu.

1. In the PDF viewer, expand the Tool Chest drop down list, and then select the annotation or stamp you want to use.



2. Select an area on the page to add the tool chest markup. The markup is added to the page.

To manage tool chest items, expand the **Tool Chest** drop-down list, and then select **Manage**. You can then right-click a tool chest item, and then select to delete it or edit the item details.

1.5.3.4 LINKING AND PINNING ANNOTATIONS

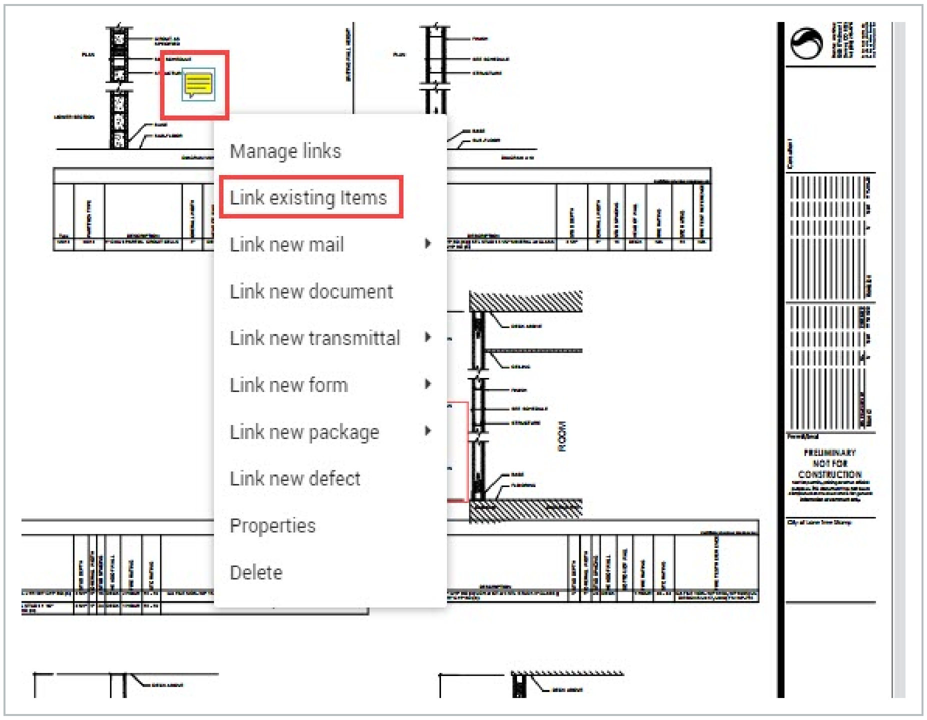
Document tools let you link supporting items or pin defects to an annotation.

LINK AN EXISTING ITEM TO AN ANNOTATION

You can link an existing item, such as mail, a document, or a form, to support an annotation on the PDF. For example, if you annotated a drawing with a note, you can add items to support that note.

The item to link must already exist in Document. See Link a new item to an annotation for information about creating a new item and linking it. If you want to add links to the document in general, you can use the Links tab.

1. Click the Select tool, and then click an annotation. A menu of linking options is shown.
2. Select **Link existing items** from the menu. A search dialog box opens.



3. Select the search criteria type, and then enter the search criteria.
4. Click **Search**.
5. Select one or more items from the search results, and then use the move right arrow to move the items to the Selected work items to link section of the page.
6. Repeat steps 3–5 until you have the links you want. Click **Save**.
7. Click **Save** in the PDF viewer.

The items are linked to the text. You can see them when you use the Links tool.

LINK A NEW ITEM TO AN ANNOTATION

You can create a new item, such as mail, a document, or a form, and then link it to annotation on the PDF in a single procedure. For example, if you annotated a drawing with a note, you can create items to support that note.

You can create and link an item to an annotation from any of the tabs of the PDF viewer. If you want to add links to the document in general, you can use the Links tab.

1. Click the Select tool, and then click an annotation. A menu of linking options is shown.
2. Select the type of item you want to link (for example, Link new document).
3. Create the new item and then save it.
4. Click **Save** on the PDF viewer.

The items are linked to the text. You can see them when you use the Links tool.

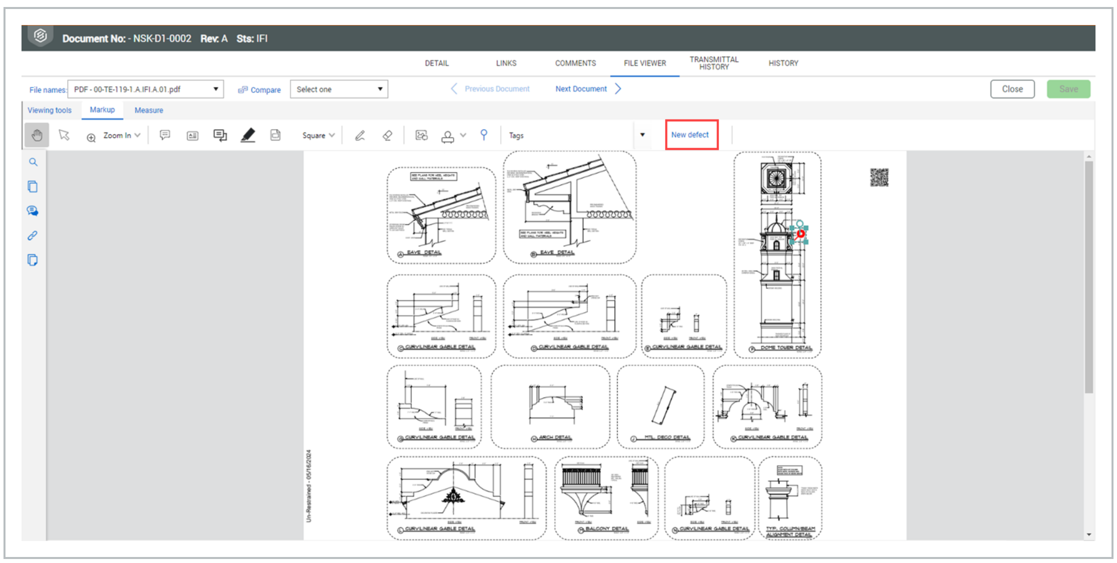
PIN A DEFECT TO A DRAWING

Summary: Pin a defect to a drawing to show where the defect is located. Using a drawing that is already in the register instead of adding a drawing to the inspection lists prevents duplicate drawings.

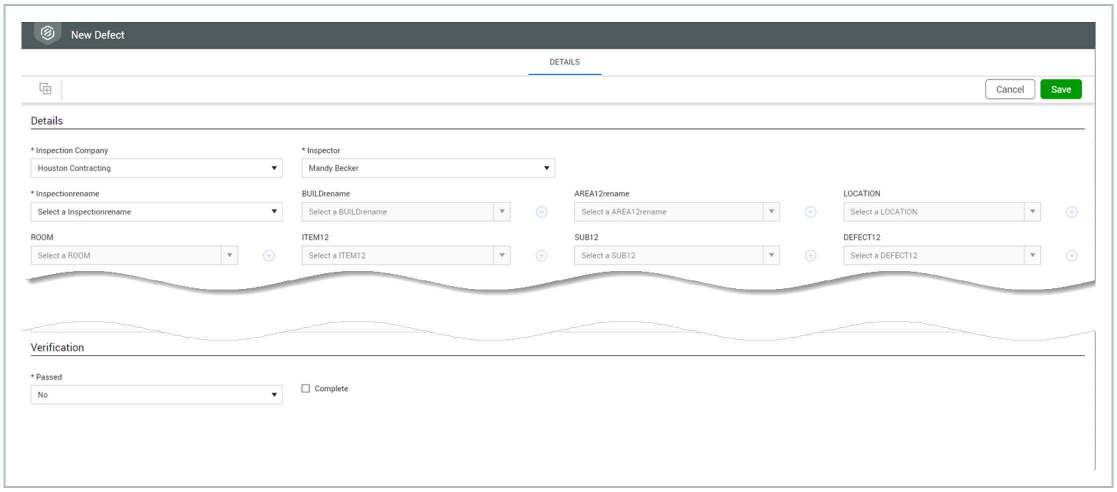
Considerations: The drawing must be a PDF.

Quick steps:

1. From a PDF drawing, go to the Markup tab, and then click **New defect**.



2. Click the area on the page to place the defect link. The New Defect Details page opens.

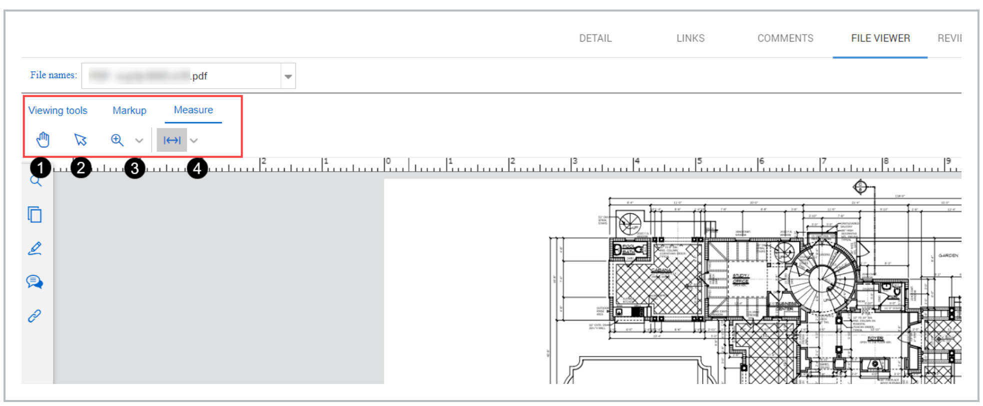


3. Enter the details of the defect, and then click **Save**. The defect is added, and additional defects tabs become available. The drawing, including the pin, shows in the Drawings tab. For information about New Defect Detail page, see Log defects on the web application.

What's next: You can add information on the additional tabs as needed.

1.5.4 MEASURE TAB

The measure tab has tools that let you measure distances, perimeters, and areas on a PDF drawing.



Item number	Name	Use
1	Pan hand	Click and drag to move a large drawing around in the viewing area.

Item number	Name	Use
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.
4	Measure	Draw an area to measure distance, perimeter, or area. A dialog box opens that lets you specify the scale.

1.6 AUTOMATIC DOCUMENT LINKING

When you upload a PDF with searchable text (OCR), Document searches for the text for document numbers that correspond to documents in the register. When it finds the matching text, it creates a hyperlink to the document. You can click the document number link to go directly to the corresponding document.

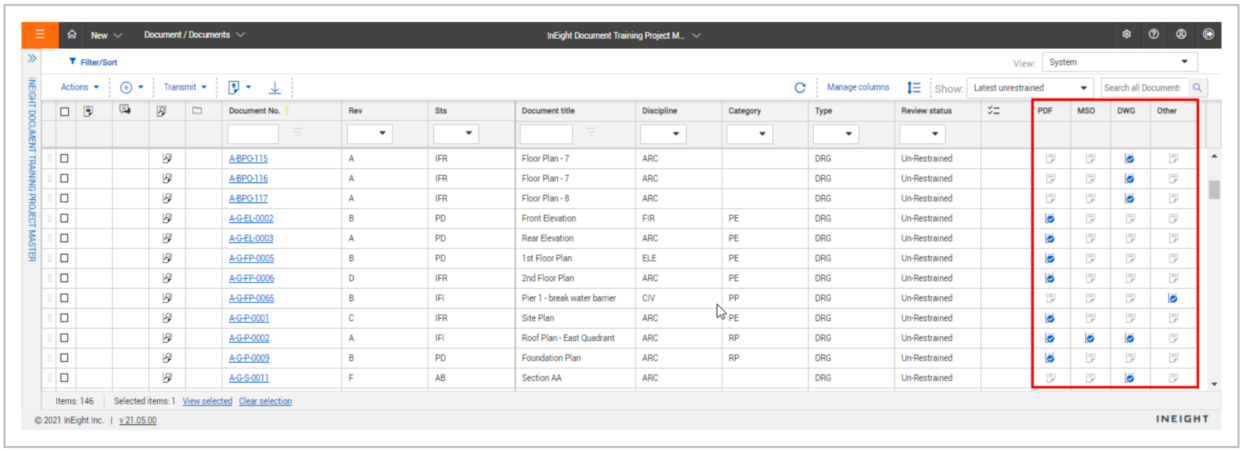
1.7 DOWNLOADING RELEASED DOCUMENTS

Download documents you have access to directly from the Register. The format columns indicate which formats the document is available in. An icon with a tick means you have access to the file and can download it. You can download the document with or without annotations (that is, markups).

1.7 STEP BY STEP 1 – DOWNLOAD A DOCUMENT WITHOUT ANNOTATIONS

You can download any document without markups that have been made.

1. Click the **Download** icon of the format you want to download.



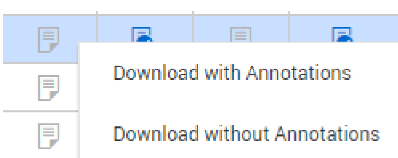
2. If the document is a PDF, a menu shows with options to download with or without annotations. Choose **Download without Annotations**. If the document is not a PDF, the option is not shown.
3. If a download disclaimer appears, click **Agree**.
4. Click **Download** to save the file to your computer.

1.7 STEP BY STEP 2 – DOWNLOAD A DOCUMENT WITH ANNOTATIONS WITH ADOBE

You can download a PDF with markups.

This option is available in the PDF viewer only and is only supported with Adobe.

1. Click the **Download** icon of the PDF you want to download. A menu shows with options to download with annotations or without annotations.



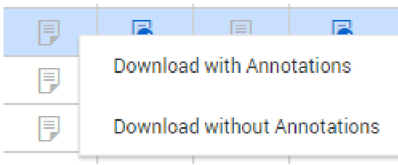
2. Click **Download with Annotations**. PDF files are provided in a zip file.
3. Extract the zip file.
4. Open thePDF file.

1.7 STEP BY STEP 3 – DOWNLOAD A DOCUMENT WITH ANNOTATIONS WITH BLUEBEAM

You can download a PDF with markups.

This option is available in the PDF viewer only and is only supported with Bluebeam.

1. Click the **Download** icon of the PDF you want to download. A menu shows with options to download with annotations or without annotations.



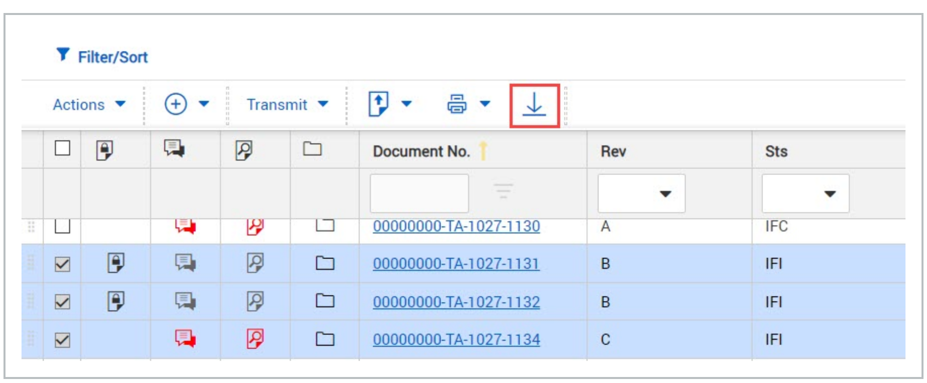
2. Click **Download with Annotations**. PDFfiles are provided in a zip file.
3. Extract the zip file.
4. Open the PDF in Bluebeam.

1.7 STEP BY STEP 4 – DOWNLOAD MULTIPLE DOCUMENTS WITH ANNOTATIONS WITH ADOBE

You can download PDFs with annotations in bulk with Adobe..

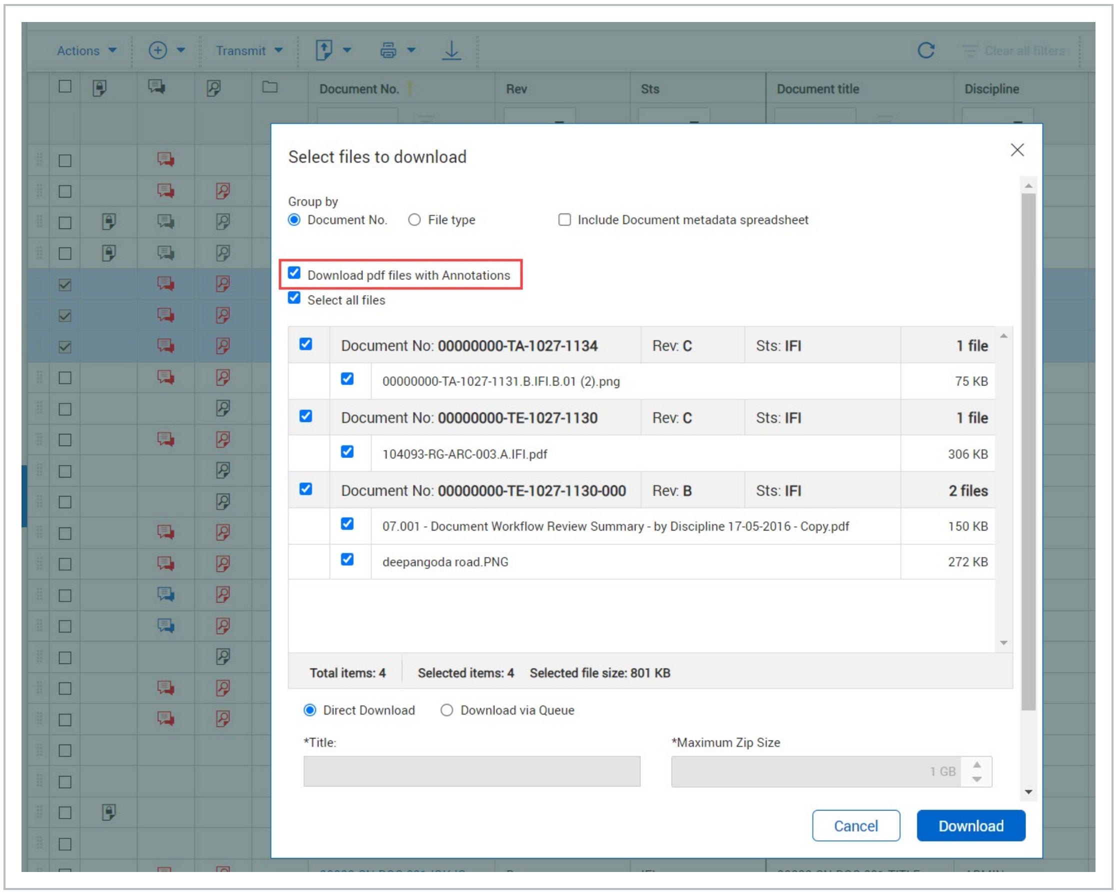
The option is available in the PDF viewer only.

1. Select multiple PDFs from the register, and then click the **Download** icon.



The Select files to download dialog box opens.

2. Select the **Download pdf files with Annotations** check box. PDF files are provided in a zip file.



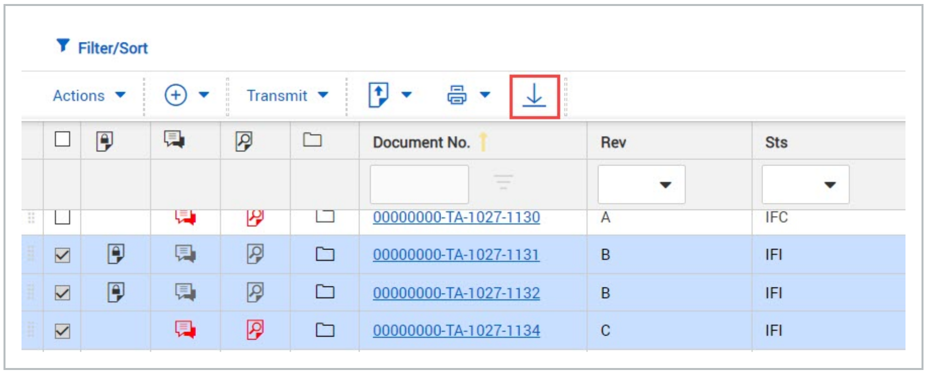
3. Extract the zip file.
4. Open the PDF file.

1.7 STEP BY STEP 5 – DOWNLOAD MULTIPLE DOCUMENTS WITH ANNOTATIONS WITH BLUEBEAM

You can download PDFs with annotations in bulk with Bluebeam.

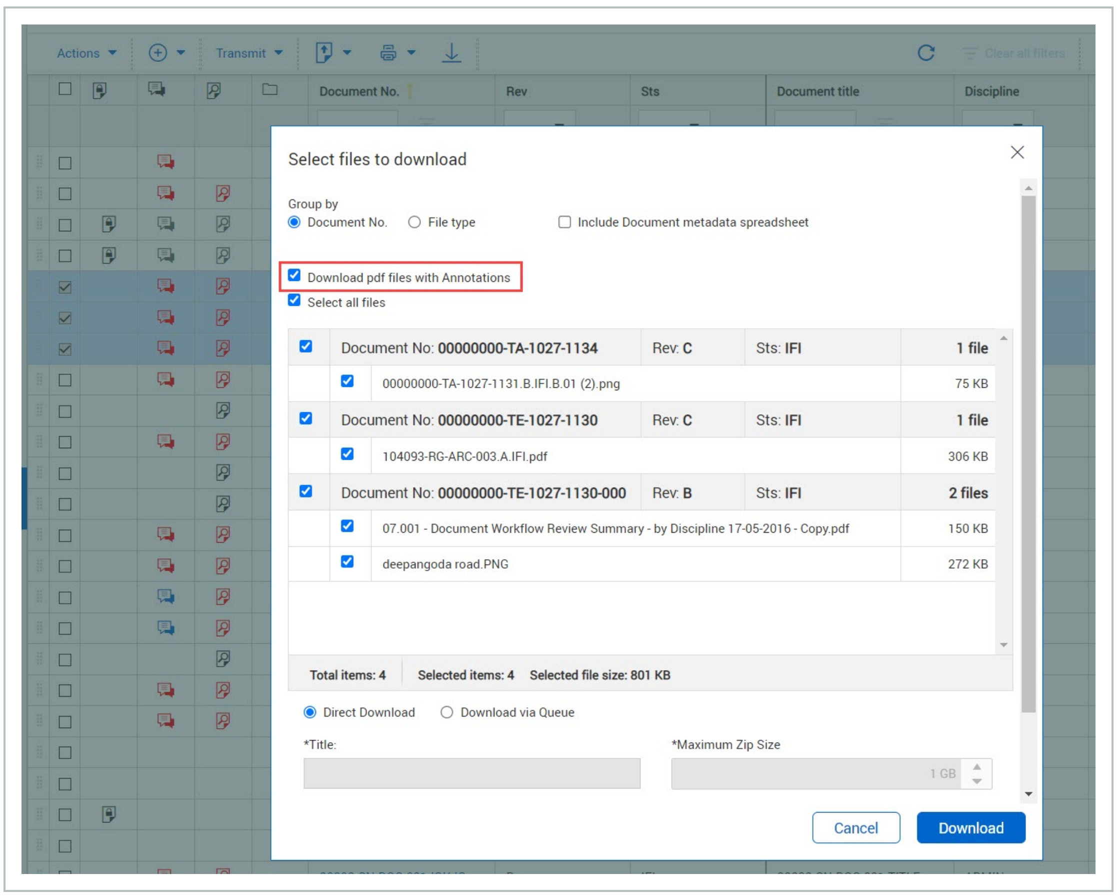
The option is available in the PDF viewer only.

1. Select multiple PDFs from the register, and then click the **Download** icon.



The Select files to download dialog box opens.

2. Select the **Download pdf files with Annotations** check box. PDF files are provided in a zip file.



3. Extract the zip file.

4. Open the PDF in Bluebeam.

1.8 DOWNLOADING DOCUMENTS IN BULK

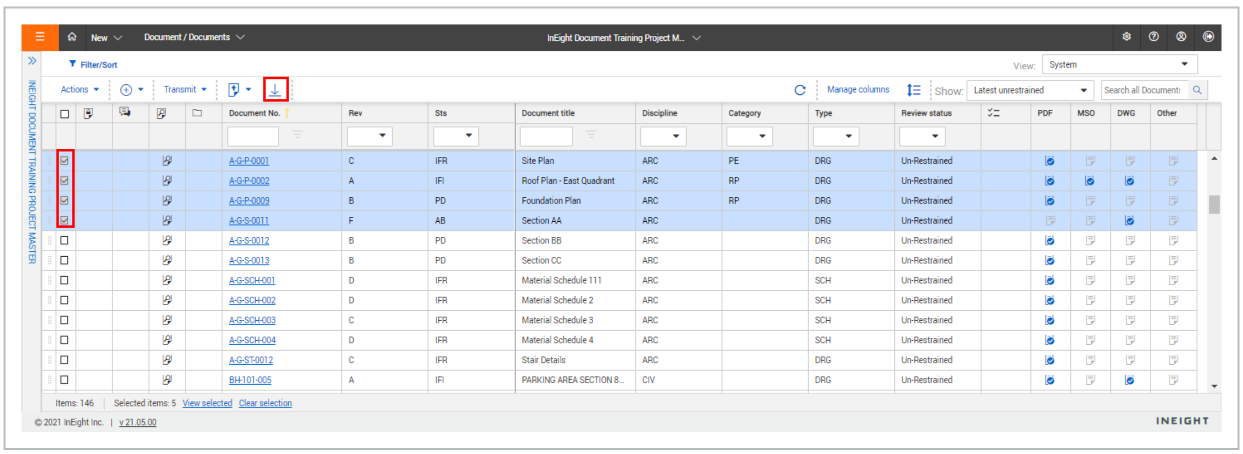
Easily download lots of documents using the bulk download feature. You can download documents directly or download from a queue.

1.8.1 DOWNLOAD DOCUMENTS DIRECTLY

You can download documents directly to your Downloads folder when you have 100 documents or less.

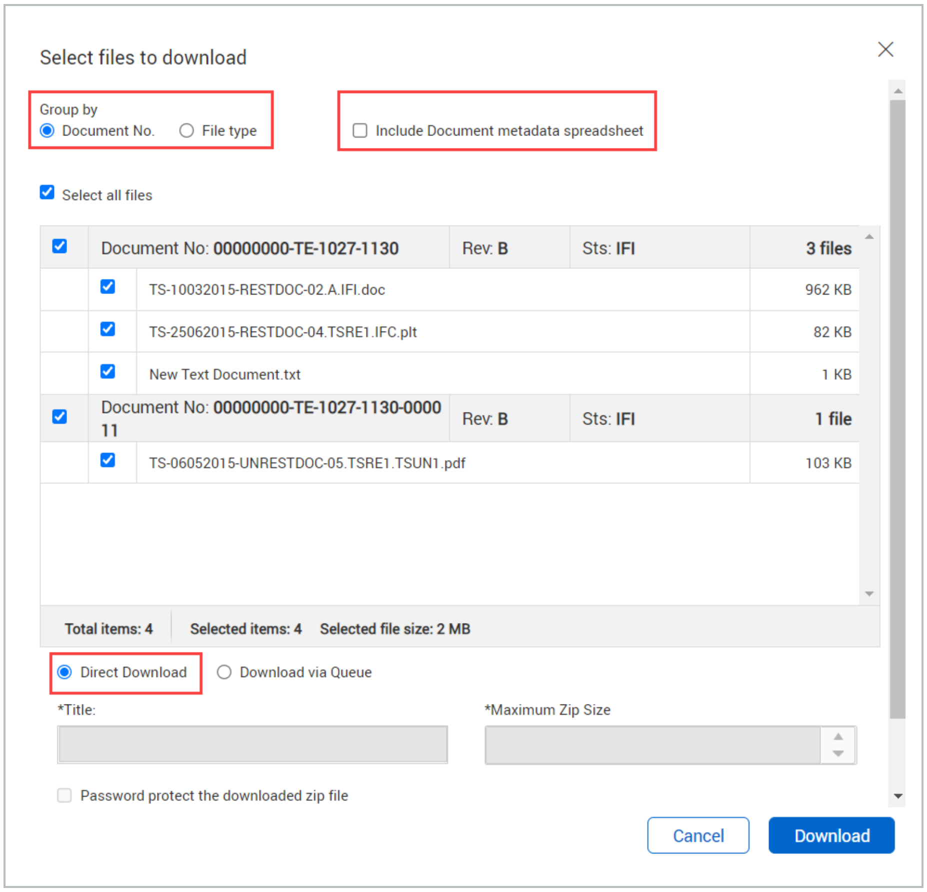
The option to download documents directly is available only when the number of documents is 100 or less. The documents are downloaded in a zip file. There is no password protection or control over the zip file size. If you want to protect the zip file with a password or control the file size, you can use the download from a queue method.

1. Select the documents in the Register.
2. Click the **Download** icon.



   The Select files to download dialog box opens.

3. Select whether to group documents by document number or file type.



4. Select whether to include the document metadata spreadsheet.
5. Select the **Direct Download** radio button.
6. Click **Download**. The files are downloaded in a zip file.

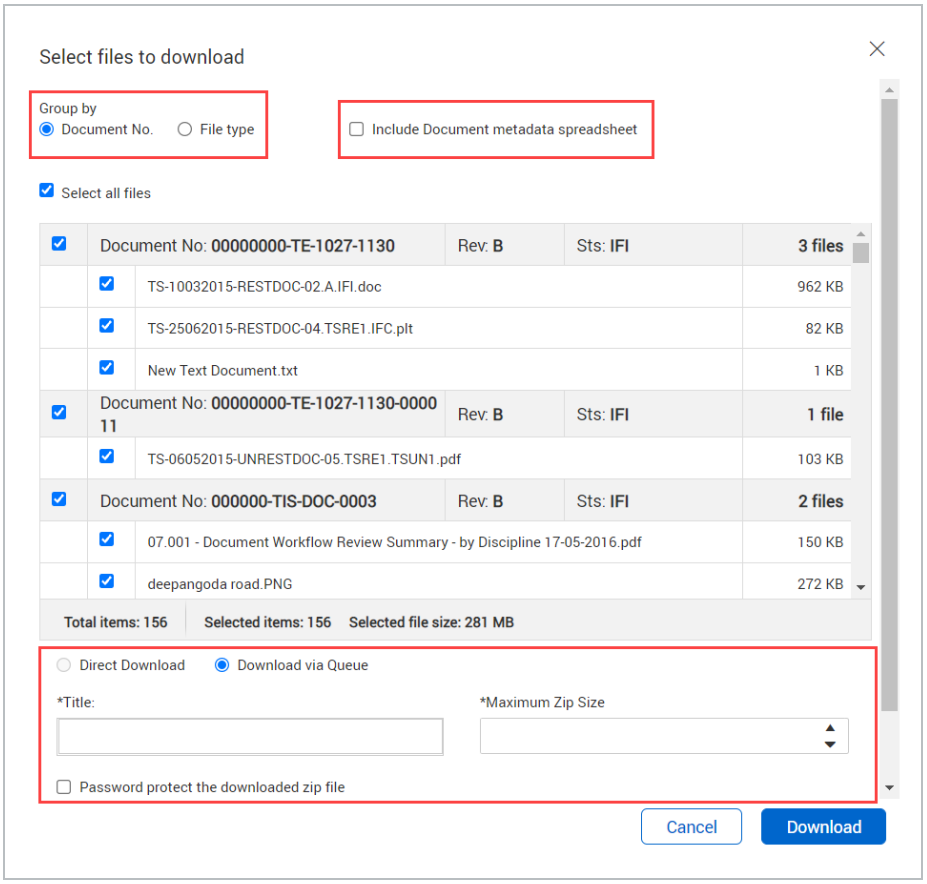
You can unzip the file and view the documents.

1.8.2 DOWNLOAD DOCUMENTS IN A QUEUE

Download documents to a queue when you have to download more than 100 documents. You can also use a queue when you want to minimize the performance impact of downloading documents. You can also use this method when you want to add a password to the zip file, control the size of the zip file, or track what has been downloaded.

The download to a queue runs on a separate process, so it does not take away from the performance of the project. After the files have been downloaded to the queue, you can download them to your workstation.

1. Select the documents in the Register.
2. Click the **Download** icon. The Select files to download dialog box opens.
3. Select whether to group documents by document number or file type.



4. Select whether to include the document metadata spreadsheet.
5. Select the **Download via Queue** radio button.
6. Enter the title of the zip file and the maximum zip file size.
7. If you want to protect the zip file with a password, select the **Password protect the downloaded zip file** check box, and then enter a password.
8. Click **Download**. A message stating the download has completed successfully is shown after the download is complete.

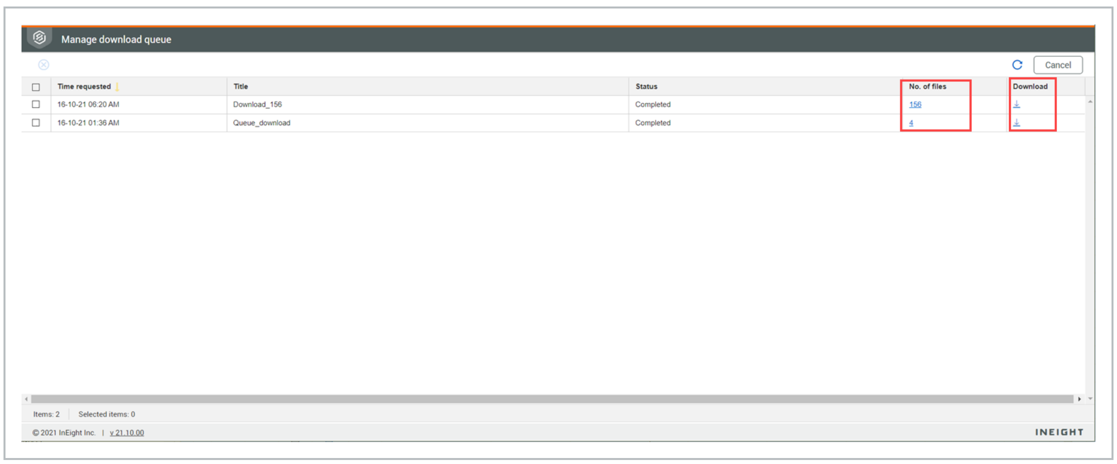
You can then download the documents from the queue to your workstation.

1.8.3 DOWNLOAD DOCUMENTS FROM A QUEUE TO YOUR WORKSTATION

After documents have been downloaded to a queue, you must download them to your Downloads folder.

After you download files, you can go to the queue to manage the files. Expired downloads have a yellow exclamation point in the Download column of the Manage download queue. If a download has expired, you cannot download the documents to your workstation, and the documents must be downloaded to the queue again.

1. From the Documents Register, click the **Actions** menu, and then select **Manage download queue**. The Manage download queue dialog box opens.
2. If you want to see a list of the files in the download, click the number in the No. of files column for the download.



3. Click the **Download** icon in for the download. The files are downloaded in a zip file to your Downloads folder.

You can unzip the file and view the documents. If you entered a password when you downloaded to the queue, you must enter it to unzip the file.

1.9 UPLOADING A SINGLE DOCUMENT

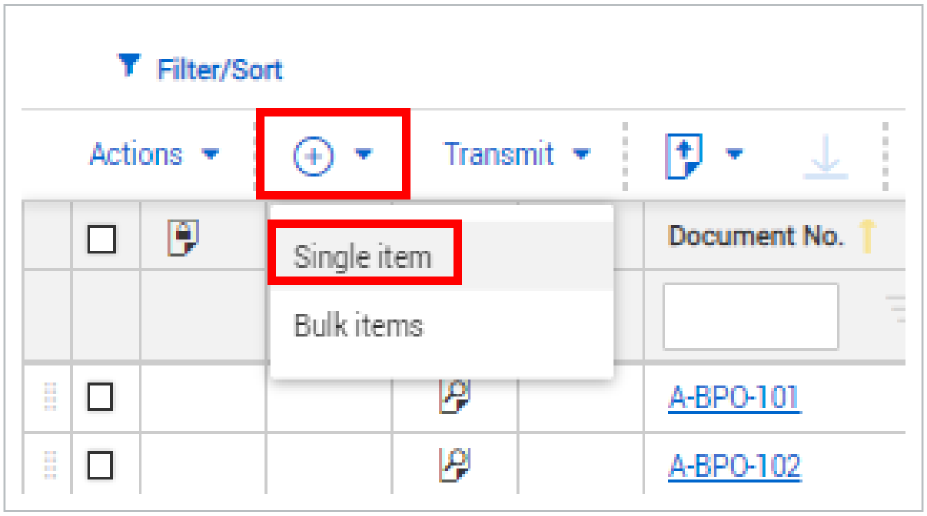
Upload documents to the Documents Register to manage and perform actions on them.

UPLOAD A SINGLE DOCUMENT

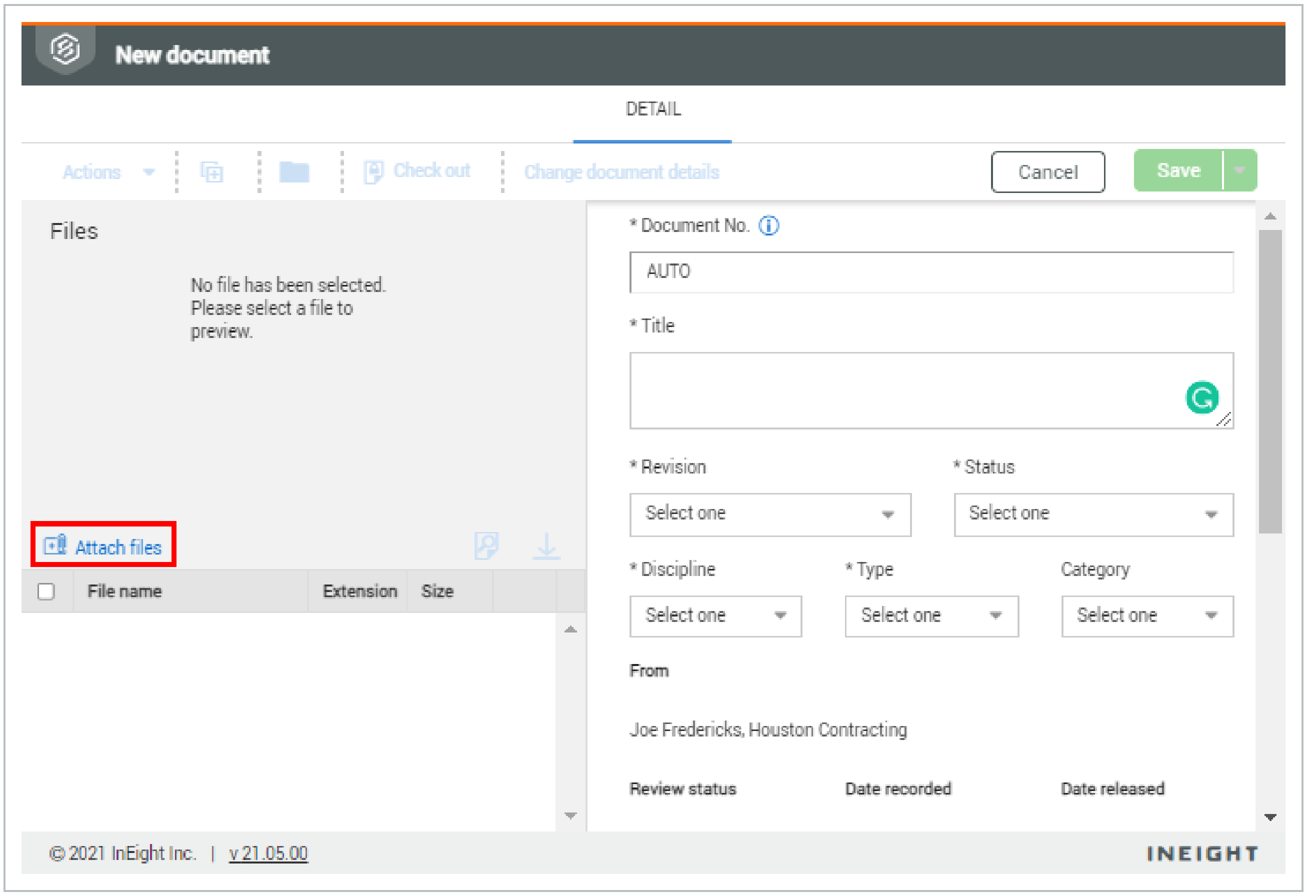
Summary: Upload a single document when you want to add it to the Documents register.

Considerations: If you are using standard folders, you can select a folder before starting these steps, and the document is automatically added to that folder.

1. Click the **Add** icon, and then select **Single item**.



2. Enter the document details.
3. Click **Attach files** to upload files.



4. Save or save and transmit. the document.
    - To save the uploaded document, click **Save**.
    - To save and transmit the document, click the **arrow** next to the Save button, and then select **Save & Transmit** to automatically launch the transmittal generation screen after the document is uploaded.

NOTE

- If the Enable OCR PDF's on document upload project setting has been enabled, a batch process runs every 15 minutes and automatically applies optical character recognition (OCR) to PDF files.

What's next: You can click **Actions,** and then select **Duplicate** to create a new document based on the attributes of a document you have selected.

1.9.1 OPTICAL CHARACTER RECOGNITION (OCR)

Document's OCR function is an automatic process that uses optical character recognition (OCR) to check PDFs for unextractable text and converts to searchable text. This feature is available for PDF documents that are A4/Letter size or larger and written in English. Only files in the Document module are considered by the OCR function.

OCR functionality is enabled at the project level.(Project settings > Document > Upload > **Enable OCR PDF's on document upload**).

The OCR process runs in the background every 15 minutes.

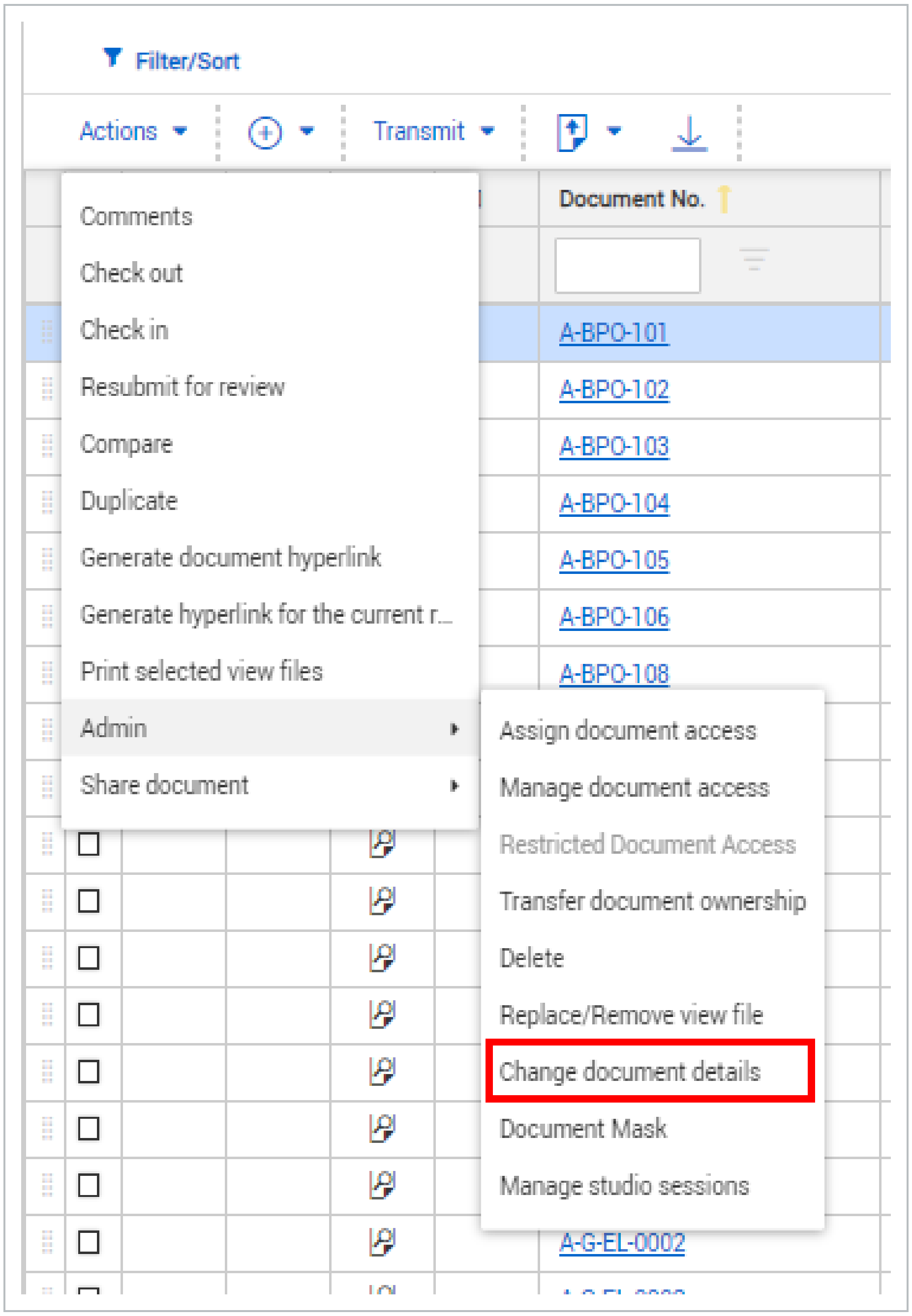
When the OCR process completes, the document view file is replaced with the new version, and a corresponding entry is created in the Document History.

1.10 CHANGING DOCUMENT DETAILS

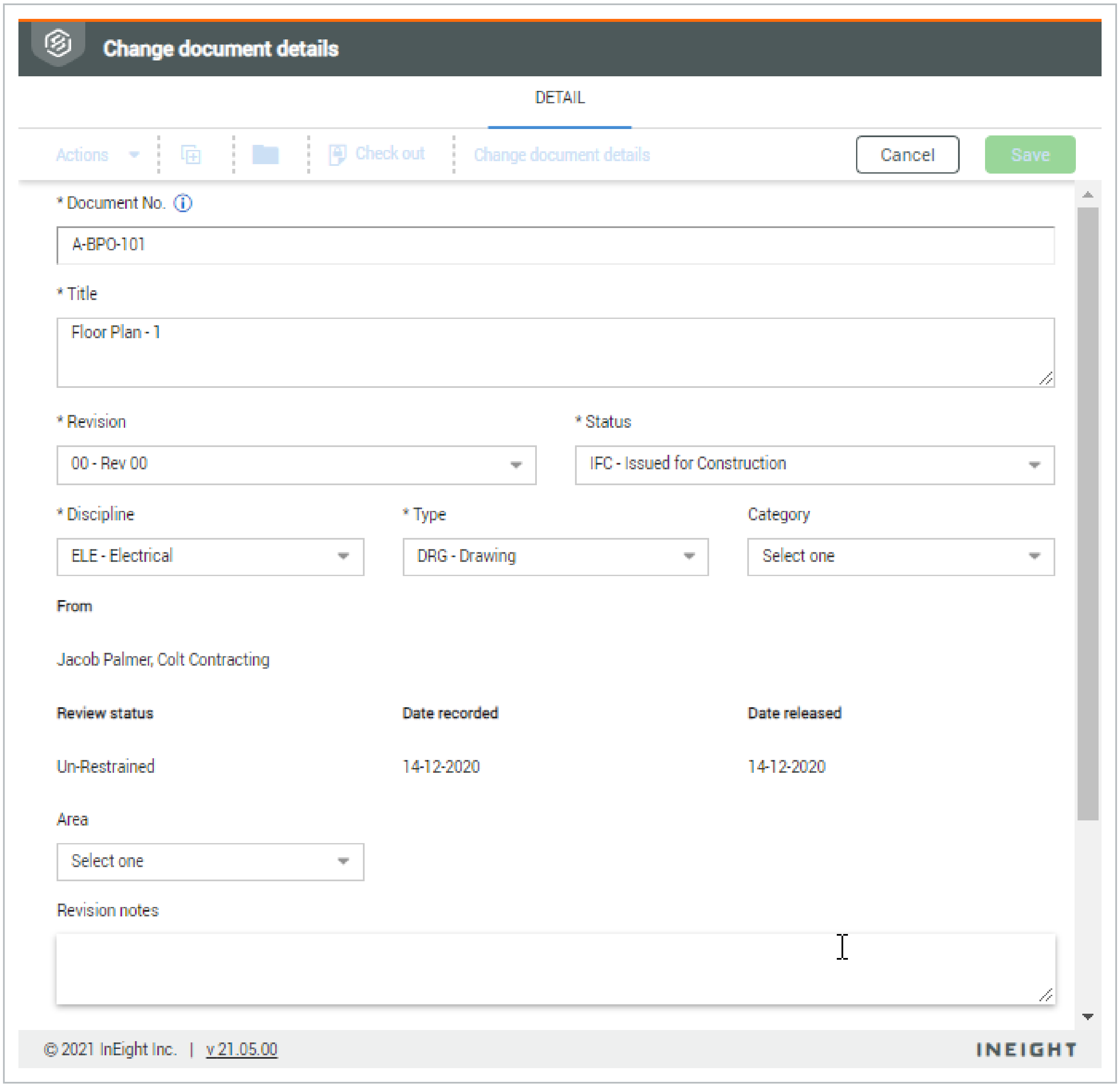
Sometimes you might need to change document details, such as if the document was uploaded under the wrong discipline.

1.10.1 TO CHANGE DOCUMENT DETAILS:

1. Select the document in the Register and click **Actions**.
2. In the **Admin** menu, select **Change document details**.



3. Edit the details as required.



You can change the document number to an existing document number as long as the revision and status combination is available. If versioning is enabled, the document number can have the same revision/status combination, and Document uses the uploaded date to order the versions.

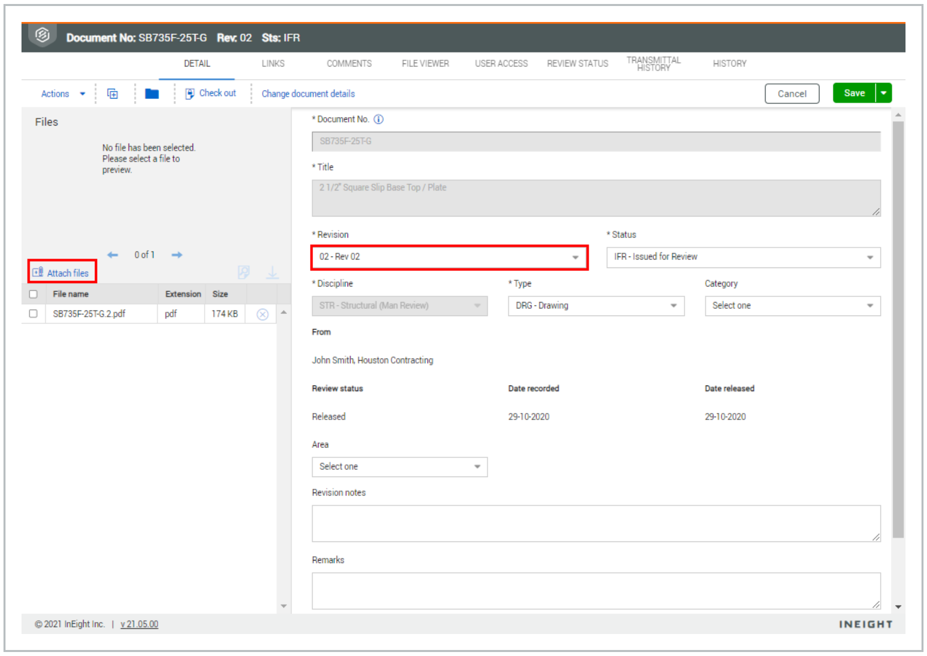
4. Click **Save**.

1.11 UPLOADING REVISED DOCUMENTS

You can upload the newest version of a revised document from within the document. By default, the newest revision will be displayed in the Documents Register.

1.11.1 TO UPLOAD A REVISED DOCUMENT:

1. Open the document.
2. Select the new revision from the drop-down menu.
3. Click **Attach files** to upload the new file(s).



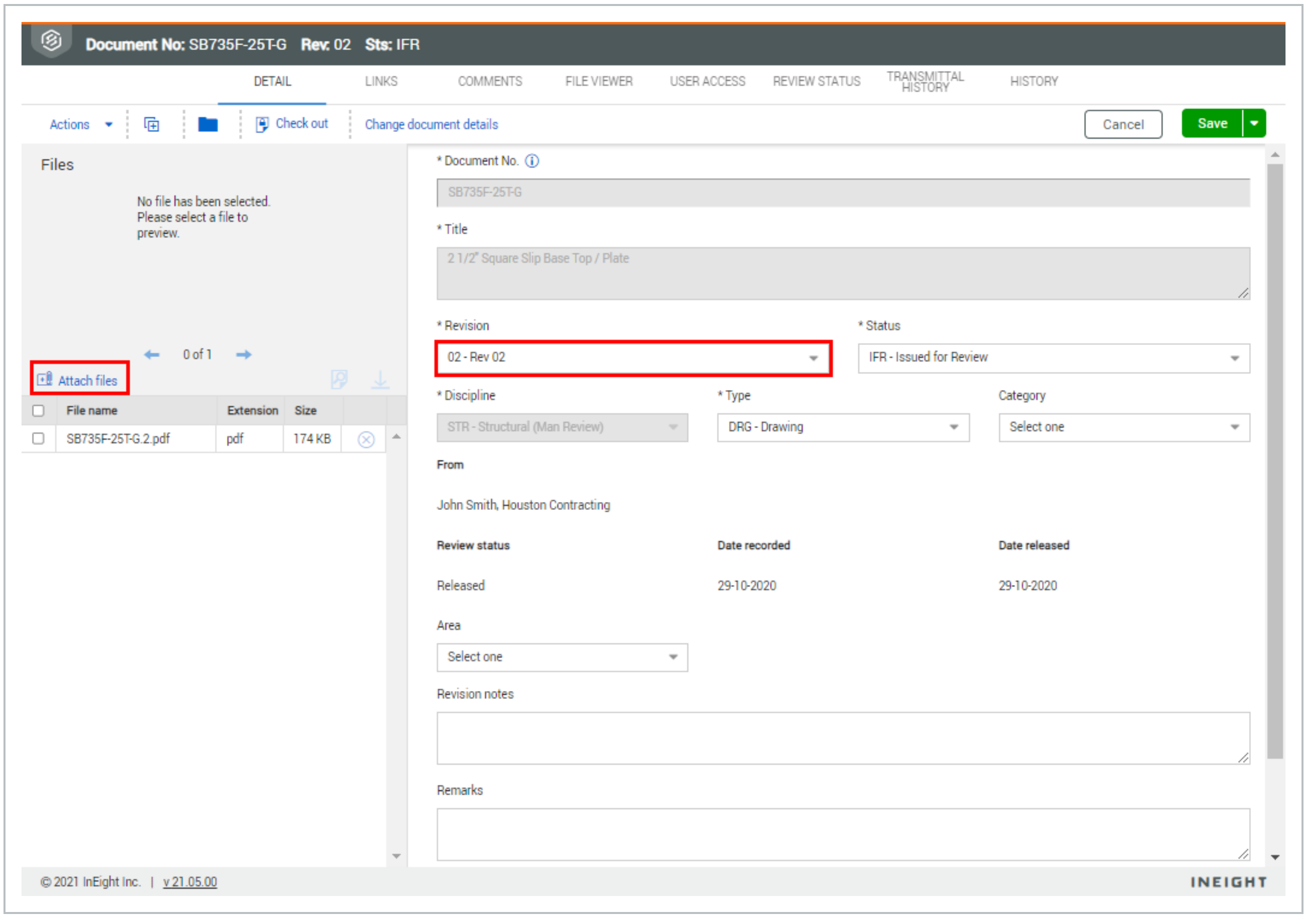
4. Click **Save**.

1.12 UPLOADING SUPERSEDED DOCUMENT REVISIONS

You can upload a superseded revision of a document from within the document. Before you can upload superseded document revisions, this option must be enabled by an administrator.

1.12.1 TO UPLOAD SUPERSEDED DOCUMENT REVISIONS:

1. Open the document.
2. Select the new revision from the drop-down menu.
3. Click **Attach files** to upload the new file(s).



4. Click **Save**.
5. A prompt is shown to ensure that you are aware you are uploading a Superseded revision.
   - If the document is not under review or if the Allow superseding document under review when processing holding area documents setting is not selected, click **Yes** to proceed.
   - If the document is under review and the Allow superseding documents under review when processing holding area document is selected, the prompt lists the documents that are currently under review. Select the documents you want to supersede, and then click **Supersede**.

NOTE

- Documents can be superseded using **Bulk upload**, just use the tick boxes to indicate that the documents are superseded revisions.
- To upload superseded revisions from InEight Document mobile apps or XL-Upload, add a suffix of ** to the Document number. In this case there will be no warning a superseded revision is being uploaded.
- The title of Documents uploaded as Superseded should match that of the latest revision. If a title change is required, the ** suffix must be added to the Title also.
- Documents uploaded as Superseded are saved with the Date recorded as the current date.

1.13 UPLOADING DOCUMENTS IN BULK

Easily upload multiple of documents using the bulk upload feature. You can choose the standard bulk upload or the enhanced bulk upload, where you can use tools such as copy and paste or dragging values to quickly enter document data.

Both upload interfaces include time-saving features. If you select a document in the Documents register before selecting **Bulk upload**, the details of that document automatically show in a row. You can then edit the details as needed.

1.13.1 UPLOADING REVISIONS

If you are uploading revised documents, select the documents in the register before selecting **Bulk upload**. You can edit the revision and attach new files.

If you are uploading to an existing document number and want Document to carry forward the same file when the status is changed, select the **Carry forward view files from the previous status** check box on the standard dialog box, or select *Yes* in the Carry forward view files column in the enhanced dialog box. Existing files are not carried over if a new file has been attached to the document.

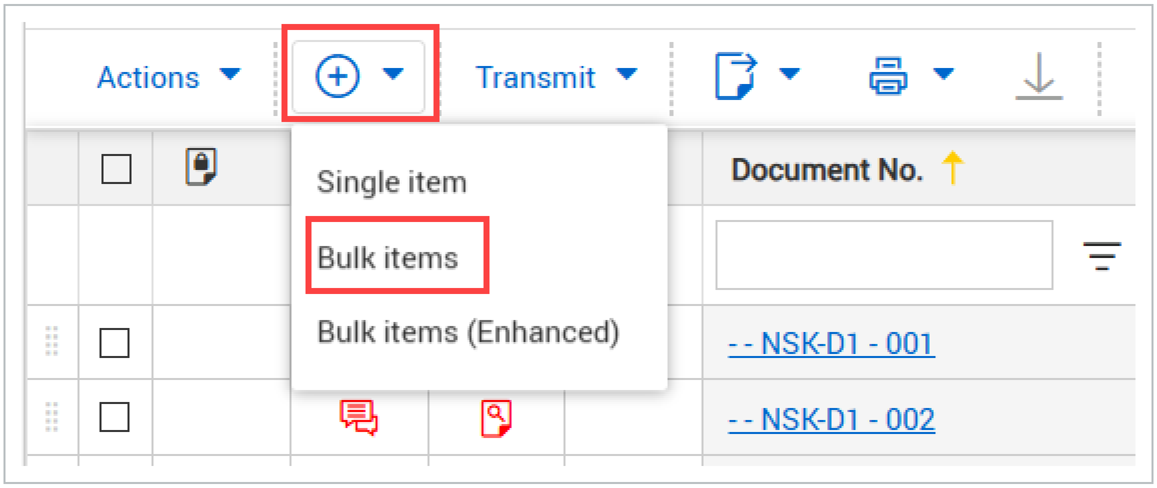
Select the **Superseded revision** check box if you want to upload previous revisions of the files.

UPLOAD DOCUMENTS IN BULK (STANDARD)

Summary: Choose the standard bulk upload tool to upload documents in bulk in the interface.

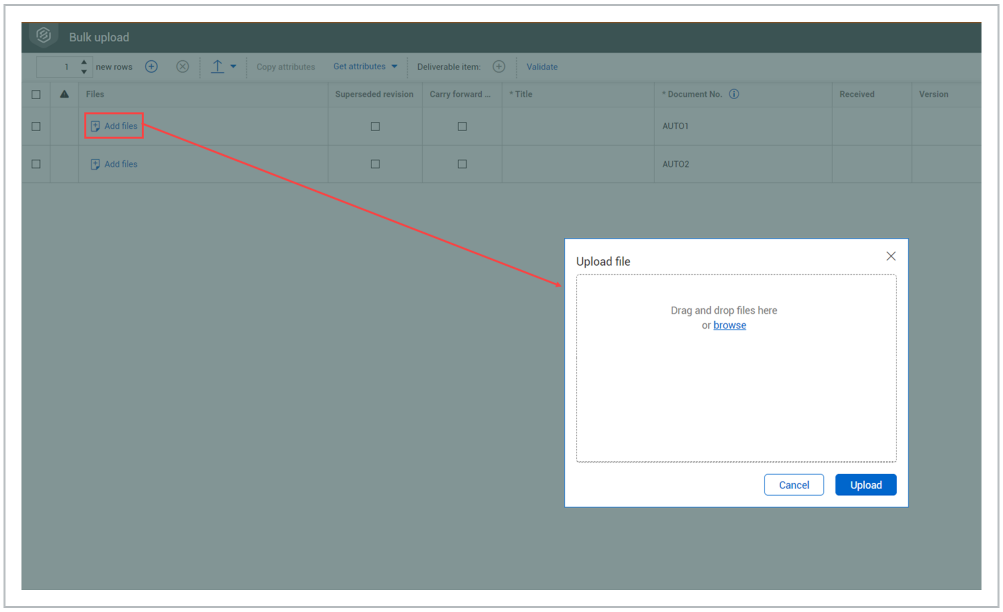
Considerations: If you are using standard folders, you can select a folder before starting these steps, and the documents are automatically added to that folder.

1. From the Documents register, click the **Add** icon, and then select **Bulk items**.

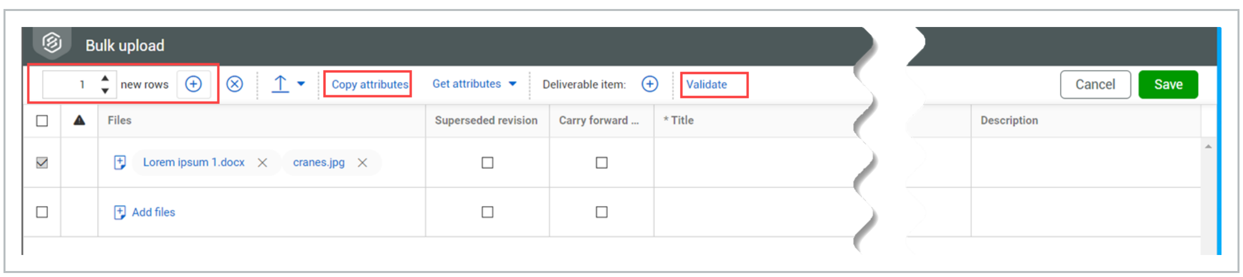


   The Bulk upload dialog box opens.

2. In the Bulk upload dialog box, click the **Add files** icon in the Files column. The Upload file dialog box opens.

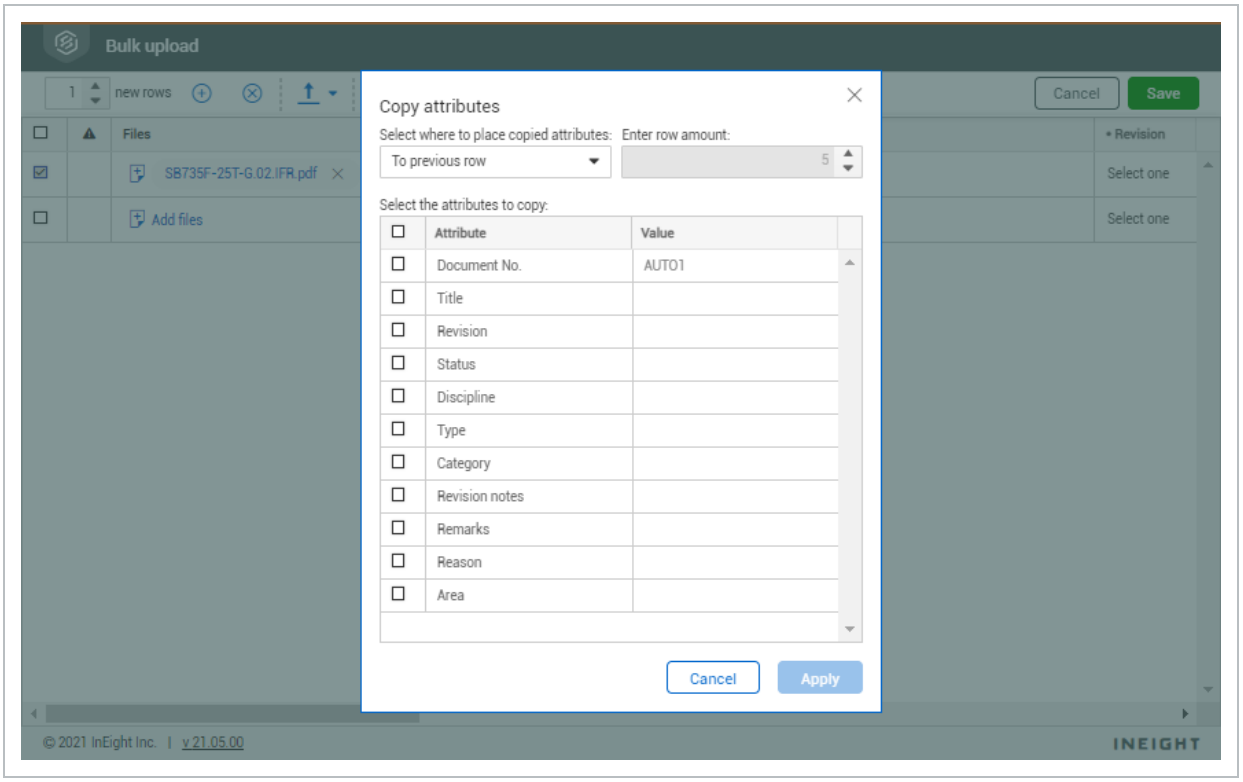


3. Drag and drop files for the document entry into the Upload file dialog box. You can upload multiple files for each document if they are of different file formats. After all files are added, click **Upload**.
4. Complete the required fields and the applicable optional fields.
5. Repeat steps 2-4 as needed. If you need additional grid lines, click the **Add rows** icon.



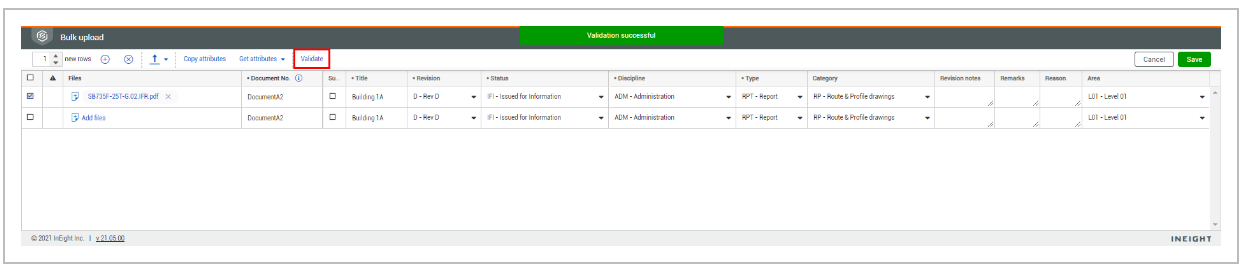
To delete a row, select the document, and then click the **Delete rows** icon.

If the documents being uploaded have similar details as other documents in the dialog box, you can select the previous document, click the **Copy attributes**, and then select which details you want to copy to each row.



You can click **Get Attributes** to retrieve document details from existing revisions with the same document number already uploaded to the Documents register.

6. Click **Validate** to check that all fields have been completed and details are correct. When there are errors, the incorrect fields show in red, so you can edit them as required.



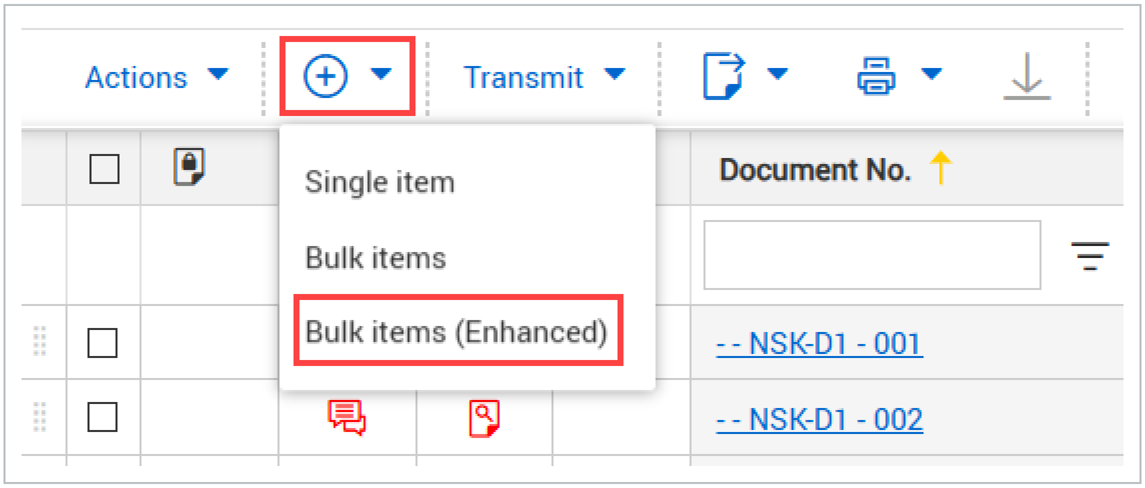
7. Click **Save**. A confirmation box opens.
   - Click **Yes** to create a transmittal for the saved documents.
   - Click **No** to return to the Documents Register.

UPLOAD DOCUMENTS IN BULK (ENHANCED)

Summary: Choose the enhanced bulk upload tool to upload when you want the convenience of spreadsheet-style tools to enter metadata quickly.

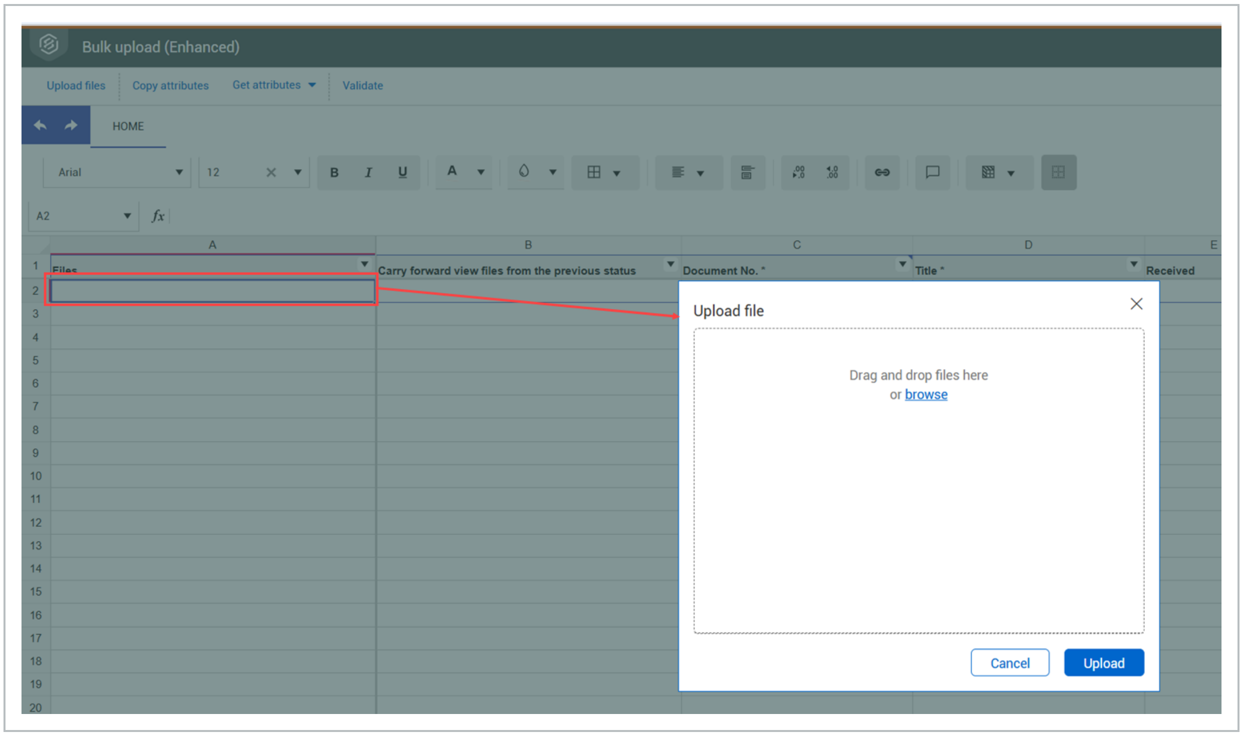
Considerations: If you are using standard folders, you can select a folder before starting these steps, and the documents are automatically added to that folder.

1. From the Documents register, click the **Add** icon, and then select **Bulk items (Enhanced)**.



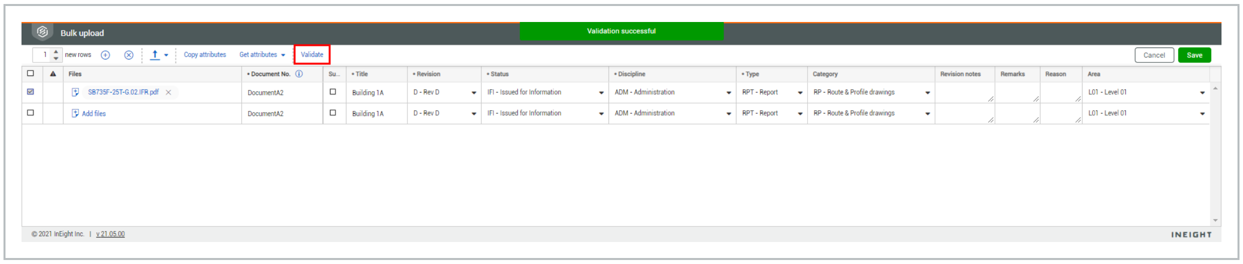
   The Bulk upload (Enhanced) dialog box opens.

2. Click the first available cell in the Files column. The Upload file dialog box opens. Alternatively, you can click the **Upload files** button.



3. Drag and drop or browse for files for entry into the Upload file dialog box. You can upload multiple files for each document if they are of different file formats. After all files are added, click **Upload**.
4. Complete the required fields and the applicable optional fields. You can use features similar to those on a spreadsheet to quickly complete document fields.
   - You can copy and paste values from a spreadsheet or another source.
   - You can drag a value across rows by selecting a cell and then hovering over the lower right corner to show the fill handle. You can then hold down the mouse and drag your mouse down the column.

   If the documents being uploaded have similar details as other documents in the dialog box, you can select the previous document, click **Copy attributes**, and then select which details you want to copy to each row.
5. Click **Validate** to check that all fields have been completed and details are correct. If there are errors, the incorrect fields show in red, so you can edit them as required.



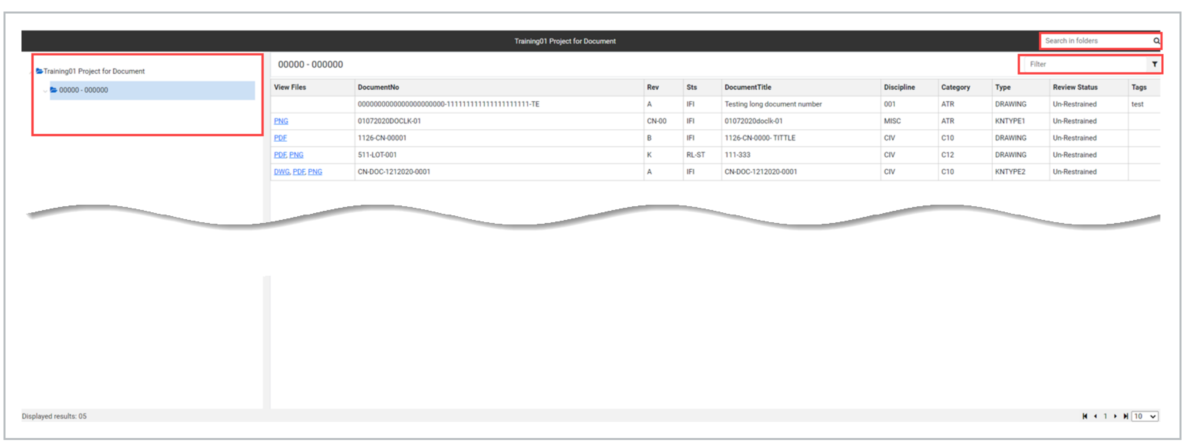
6. Click **Save**. A confirmation box opens.
   - Click **Yes** to create a transmittal for the saved documents.
   - Click **No** to return to the Documents Register.

1.14 EXPORT FOLDERS

To assist in project handover of documents incrementally, an export option is available on the document register. This export function packages the relevant files and provides a cover sheet with navigational links, an associated Microsoft Excel spreadsheet with the folder structure data and document details, and an interactive HTML interface.

The cover sheet provides a table of contents that has links to each document in the folder. The metadata sheet shows the Excel export of the document metadata.

The HTML interface is called index.HTLML. When you open the index from your File Explorer, a folder structure and grid are shown. The folder structure in the left-side navigation pane mimics the navigation pane in the Documents register. You can click on entries in the navigation pane to see its contents in the grid. You can use the search and filter features to quickly find files.



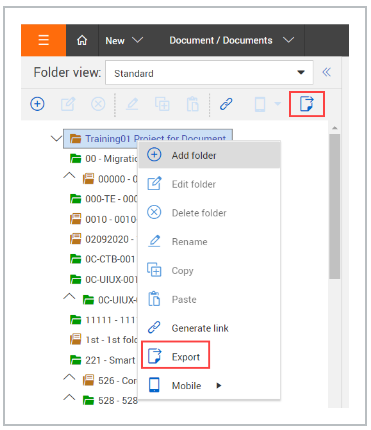
The grid shows the files in a folder along with document metadata. You can click the file link to open the file.

1.14 STEP BY STEP 1 – EXPORT A FOLDER

Export a folder and all its contents when you need to download the entire folder to your desktop. As folder structures can contain large amounts of data, a download link will be provided in a notification.

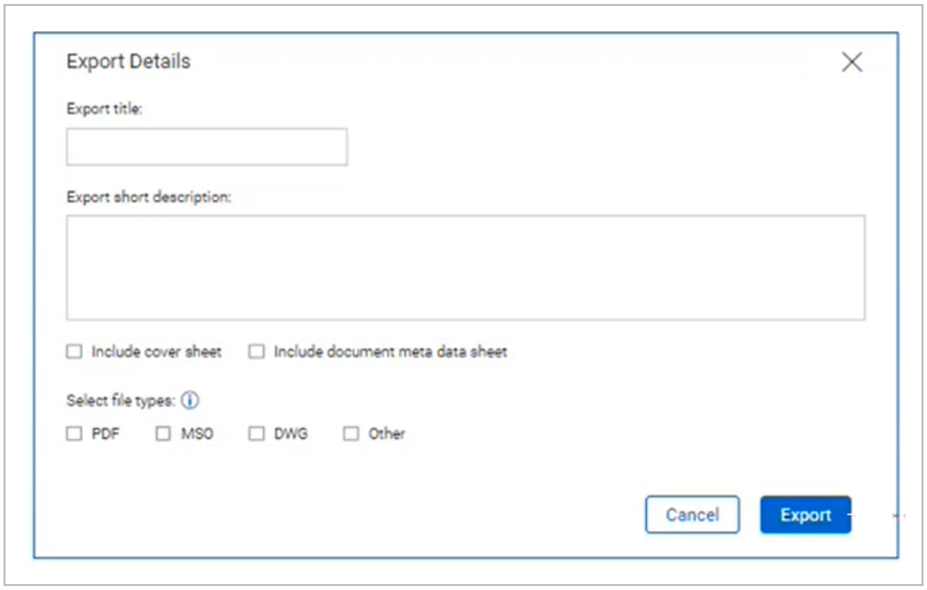
Folder export is for standard and smart folders only.

1. Select a folder in the folder structure and select the **Export** icon. Alternatively, you can right-click the folder, and then select **Export** from the menu.

   The Export Details dialog box opens.

2. Add a title and a description of the export, and then indicate whether to include a cover sheet and metadata sheet in the export.



3. Select the file formats that must be included in the export. Multiple file types can be included in the export.
4. Click **Export**. The export is prepared in the background as a ZIP file.

After the export has completed, a notification is sent with a link to download the zip file.

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CHAPTER 2 – WORKING WITH DOCUMENTS

The Documents Register makes working with documents easy. You can perform a number of actions on documents after they are uploaded into the Documents Register.

See the links below for information on how to work with documents.

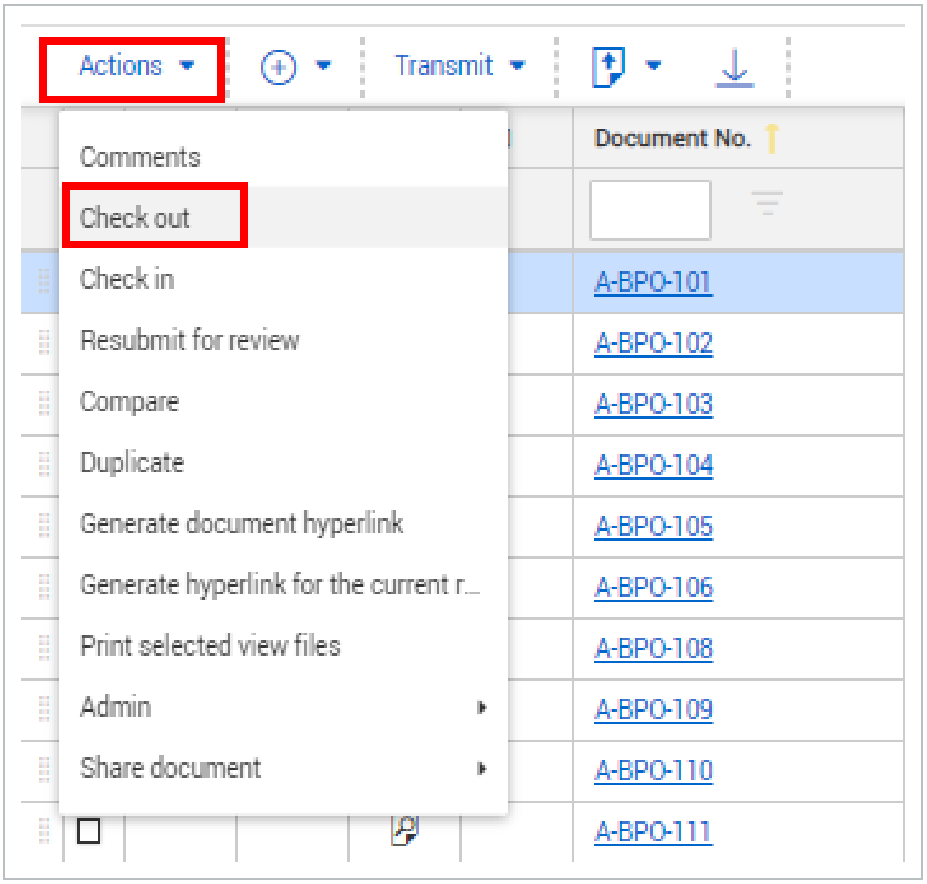
2.1 CHECKING OUT AND CHECKING IN DOCUMENTS

The check out functionality can be used for various reasons, such as when documents need to be placed on hold if they have been released too early. This prevents other users from downloading the document while it is being updated.

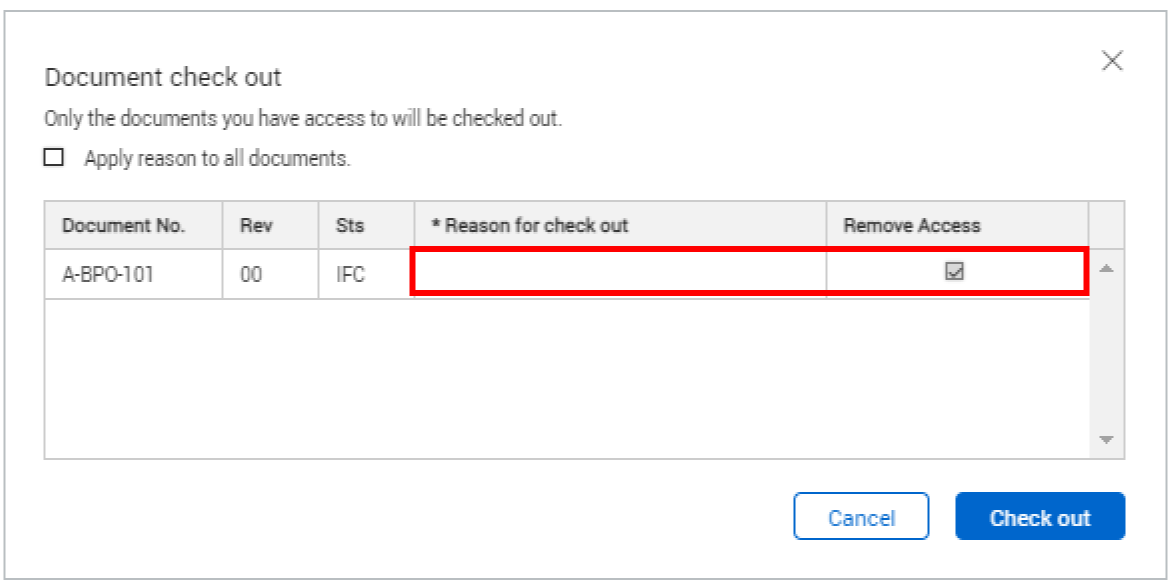
After any changes are completed the document can be checked in, meaning users can download it again.

2.1.1 TO CHECK OUT A DOCUMENT:

1. Select the document.
2. Click **Actions** and select **Check out**.



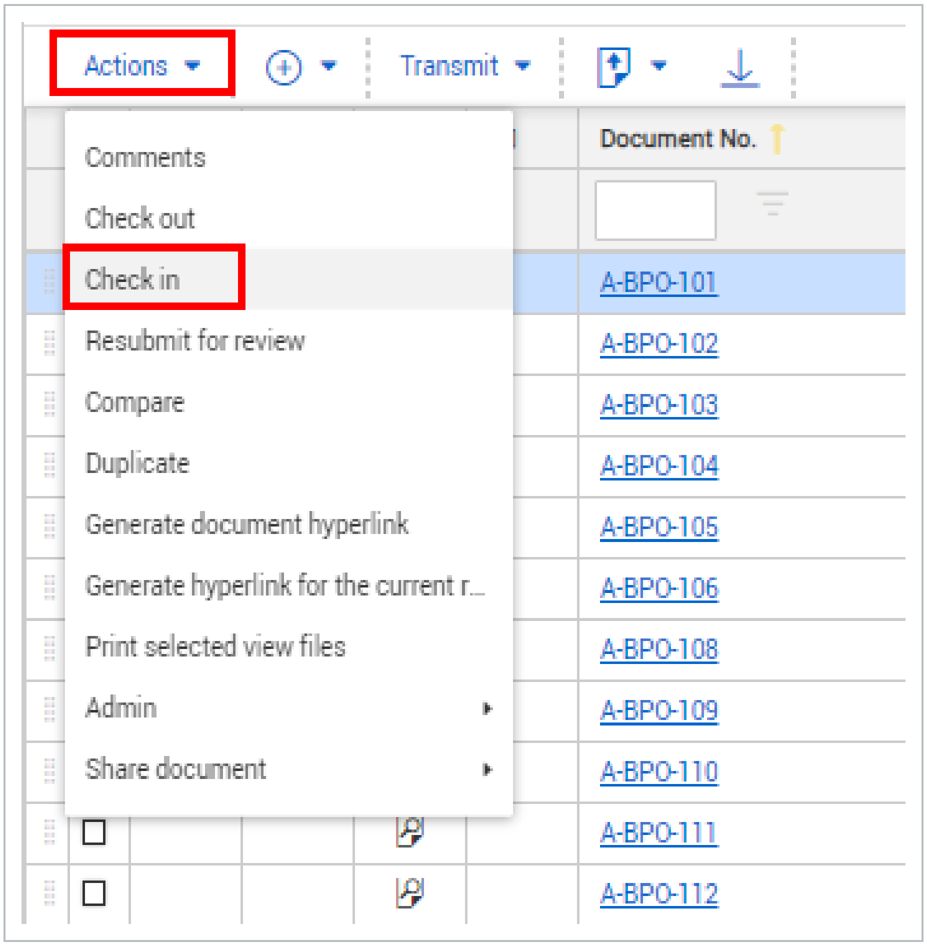
3. Enter a reason for checking out the document.
4. If you want to completely remove access to the document (and while it's checked out, select the **Remove Access** check box.



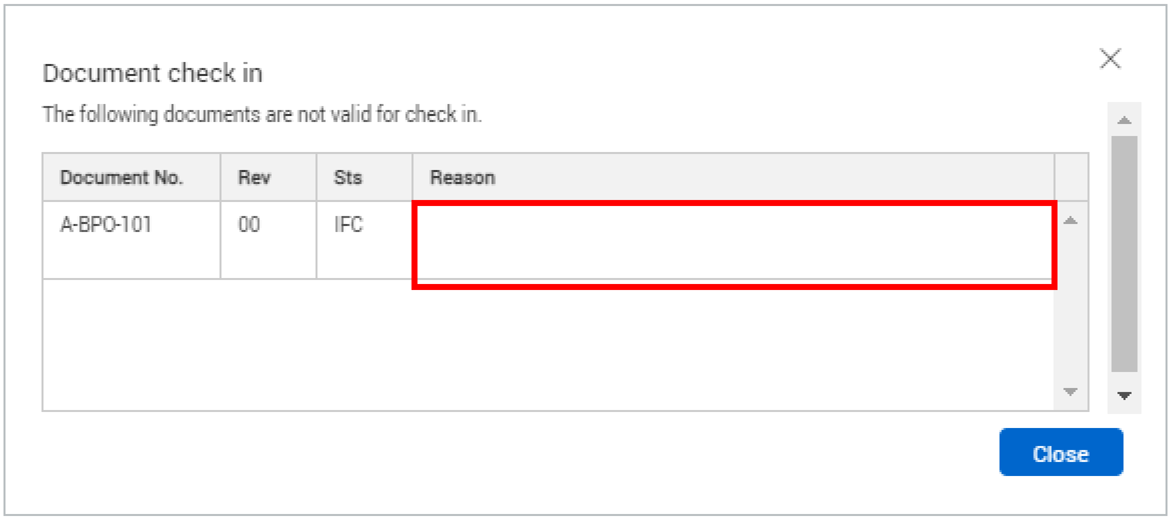
5. Click **Check out**.
6. Click **Yes** to confirm.

2.1.2 TO CHECK IN A DOCUMENT:

1. Select the document in the Register.
2. Click **Actions** and select **Check in**.



3. Enter the reason for checking in the document.



4. Click **Check in**.
5. Click **Yes** to confirm.

NOTE

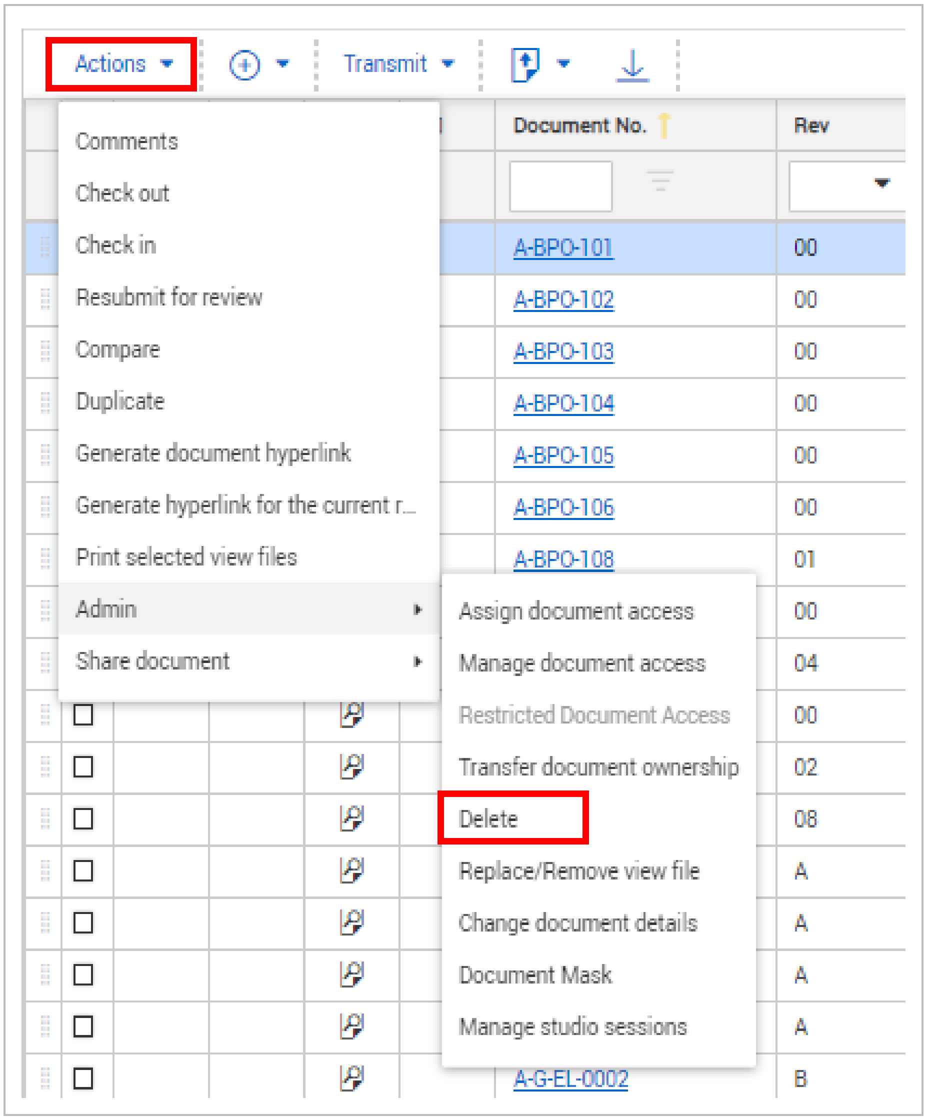
- Documents that are checked out will have a **padlock icon** displayed next to them in the Register.
- Documents can also be checked out from the document details window.

2.2 DELETING DOCUMENTS

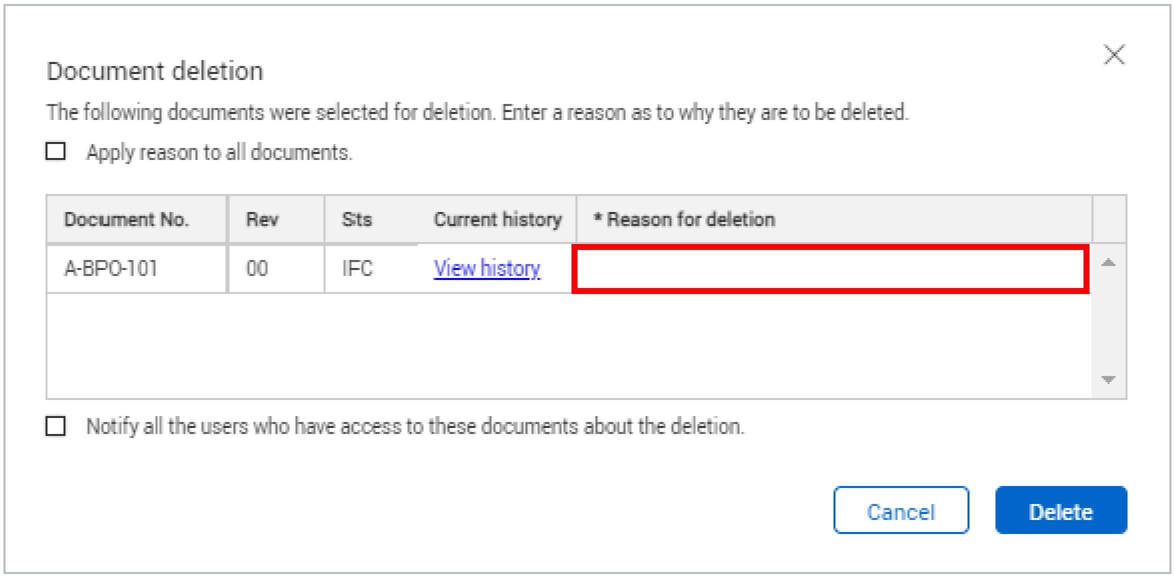
There are times where documents may need to be deleted from the Document Register. You can delete documents through the Admin menu if you have access to this function.

2.2.1 TO DELETE A DOCUMENT:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Delete**.



4. Enter a reason for the deletion.



5. If you want to apply the same reason to all documents, select the first check box.
6. If you want to notify all users who have access to the document, select the second check box.
7. Click **Delete**.
8. Click **Yes** to confirm.

NOTE

- The **View history** link can be used to see if the document has been transmitted to anyone or included in any packages.
- Use the reports module to view a full audit history of any deleted documents. The report will show who deleted the document, when and why.

2.3 RESTORE DELETED VIEW FILES AND COMMENTS

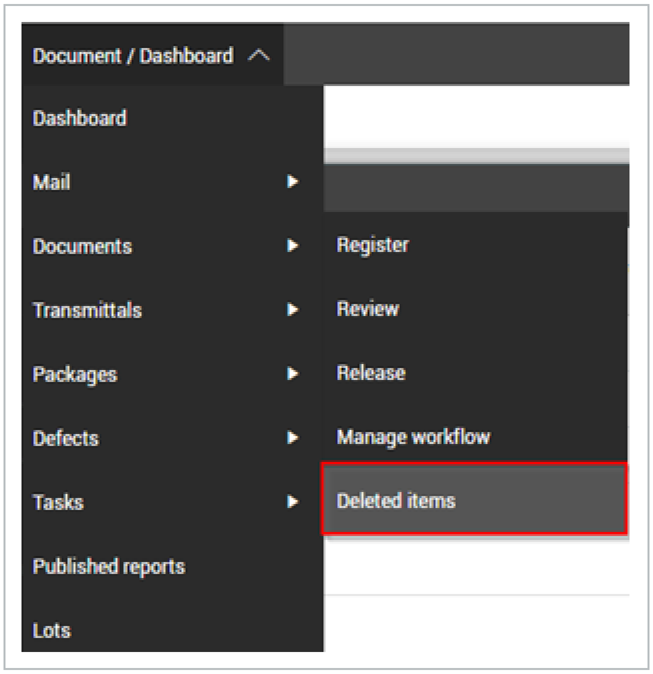
There are times when a deleted document needs to be restored to the Documents register. If you have the proper security group permissions, you can restore deleted files and comments. If a document has been deleted within the last 30 days, the document is restored with comments. If it is after 30 days, it is uploaded to the Documents register as a new document.

2.3.1 RESTORE DELETED DOCUMENTS

You can restore a deleted document if a document was deleted accidentally or if you find you need a document that was deleted.

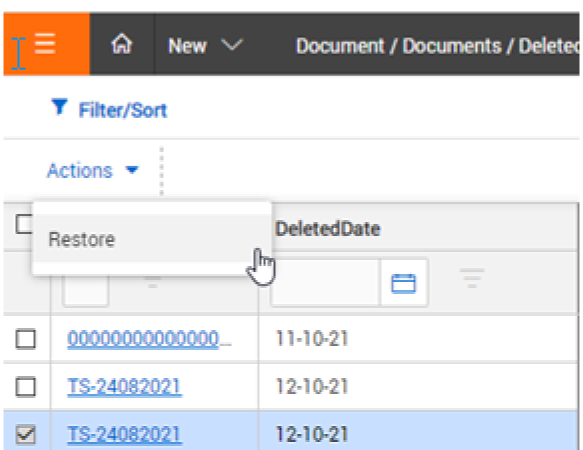
You must have the applicable permissions to restore documents. If you do not have the proper security group permission, see your system administrator.

1. From the module navigation, go to Documents > **Deleted items**.



The Manage deleted documents register opens.

2. Select the documents you want to restore, and then click Actions > **Restore**.



If the document had been deleted in the last 30 days, the document and any comments are returned to the Documents register. The document history shows that the document has been restored.

If a document you restored was deleted more than 30 days ago, the New document upload screen is shown with the relevant metadata and the view files. You must add the document as new. The newly added document does not have any previous comments or other associations.

2.4 ADDING COMMENTS TO DOCUMENTS

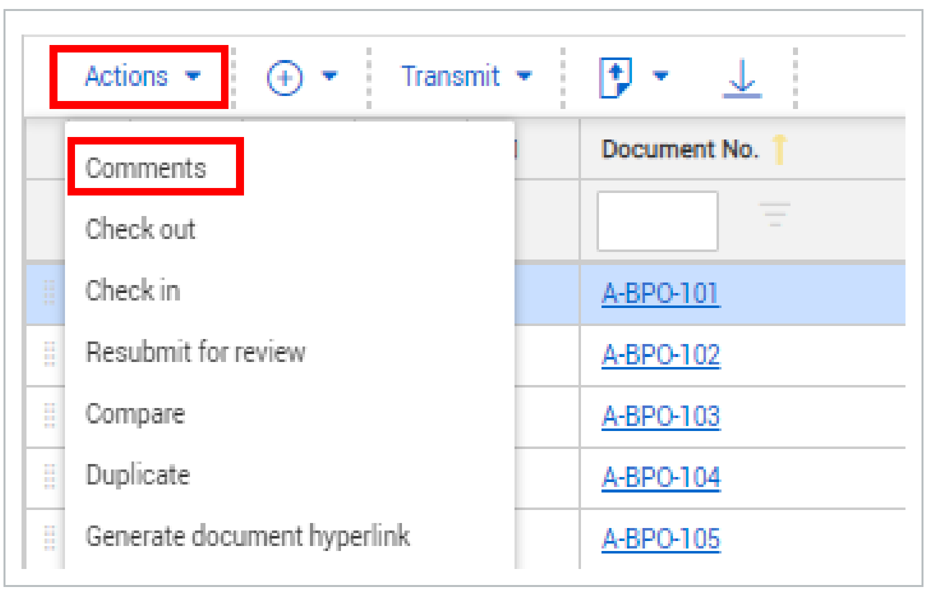
You can add comments to documents and control who can view them.

2.4 STEP BY STEP 1 – ADD COMMENTS TO A DOCUMENT

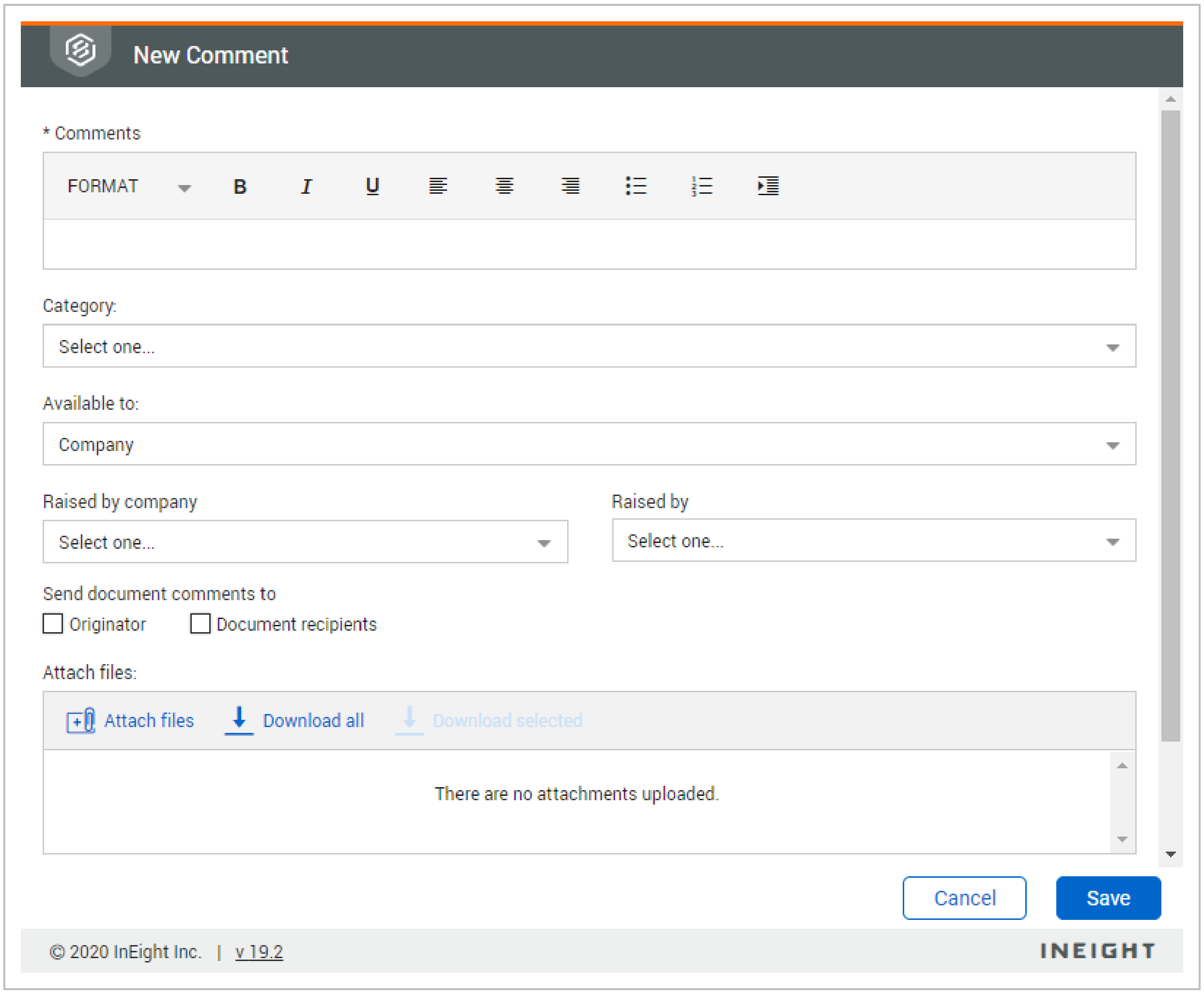
Summary: Add detailed comments from any document in the documents register.

Considerations: You can control the fields that are present or required at either a comment or comment response level, so you can present different fields as needed. Contact InEight customer support at support@ineight.com for information about configuring different fields for each type.

1. Select the document in the Register.
2. Click **Actions** and select **Comments**.



3. Enter the comment details.



4. Click **Save**.

5. You can optionally attach additional files or download the current files attached to the document.

2.5 COMPARING DOCUMENTS

The Compare feature can be used to compare two documents that you have access to, for example, if you have drawings for HVAC and electrical or two revisions of the same document, you can now see how they align. The two documents are overlaid on each other to enable a side-by-side comparison. You can only compare two files, and they must be of the same format, such as PDF to PDF or DWG to DWG.

When working with vector files, such as DWG, an intelligent overlay occurs so that differences are automatically highlighted. For non-vector files the content is not compared, just overlaid.

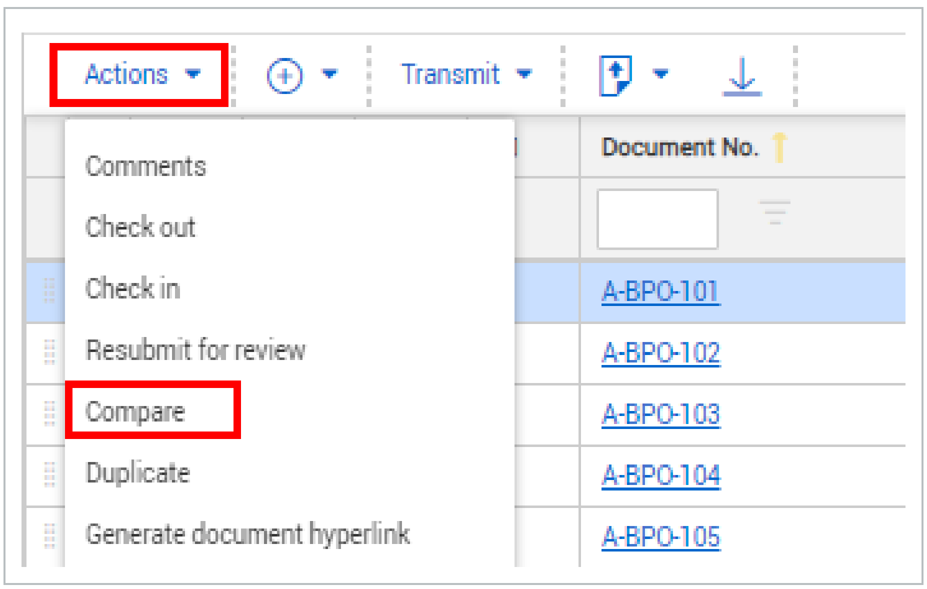
NOTE	For large files the comparison can take some time to prepare.

NOTE	If a file has been scanned to PDF, it might not line up accurately on top of another scanned file. Ideally the comparison function should be utilised on digitally saved files.

2.5 STEP BY STEP 1 – COMPARE TWO DIFFERENT DOCUMENTS

Compare two different documents when you want to see how they align.

1. From the Documents register, select the two documents to compare.
2. Click **Actions,** and then select **Compare**.



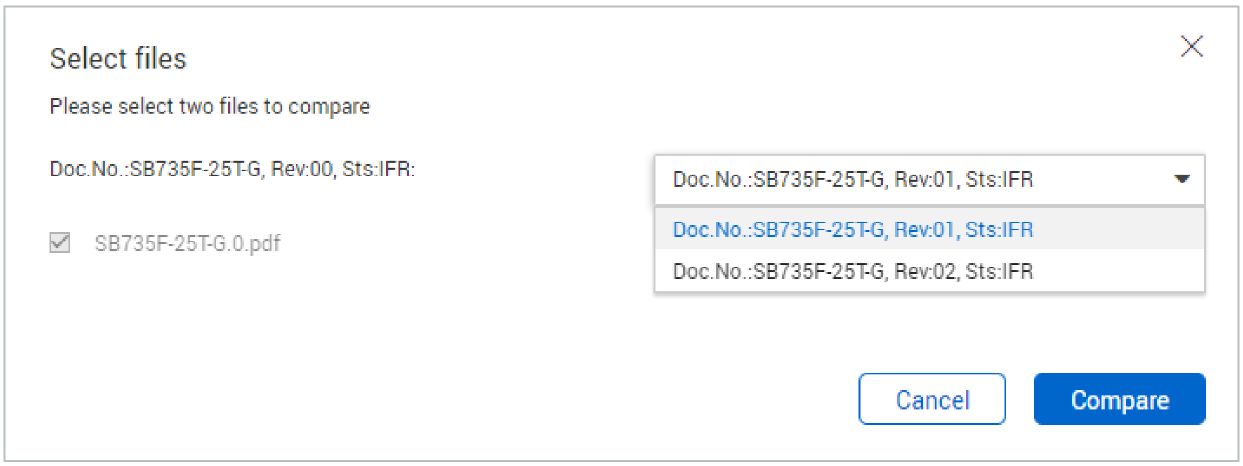
The two documents are shown overlaid in the Viewer.

2.5 STEP BY STEP 2 – COMPARE TWO REVISIONS OF THE SAME DOCUMENT FROM THE REGISTER

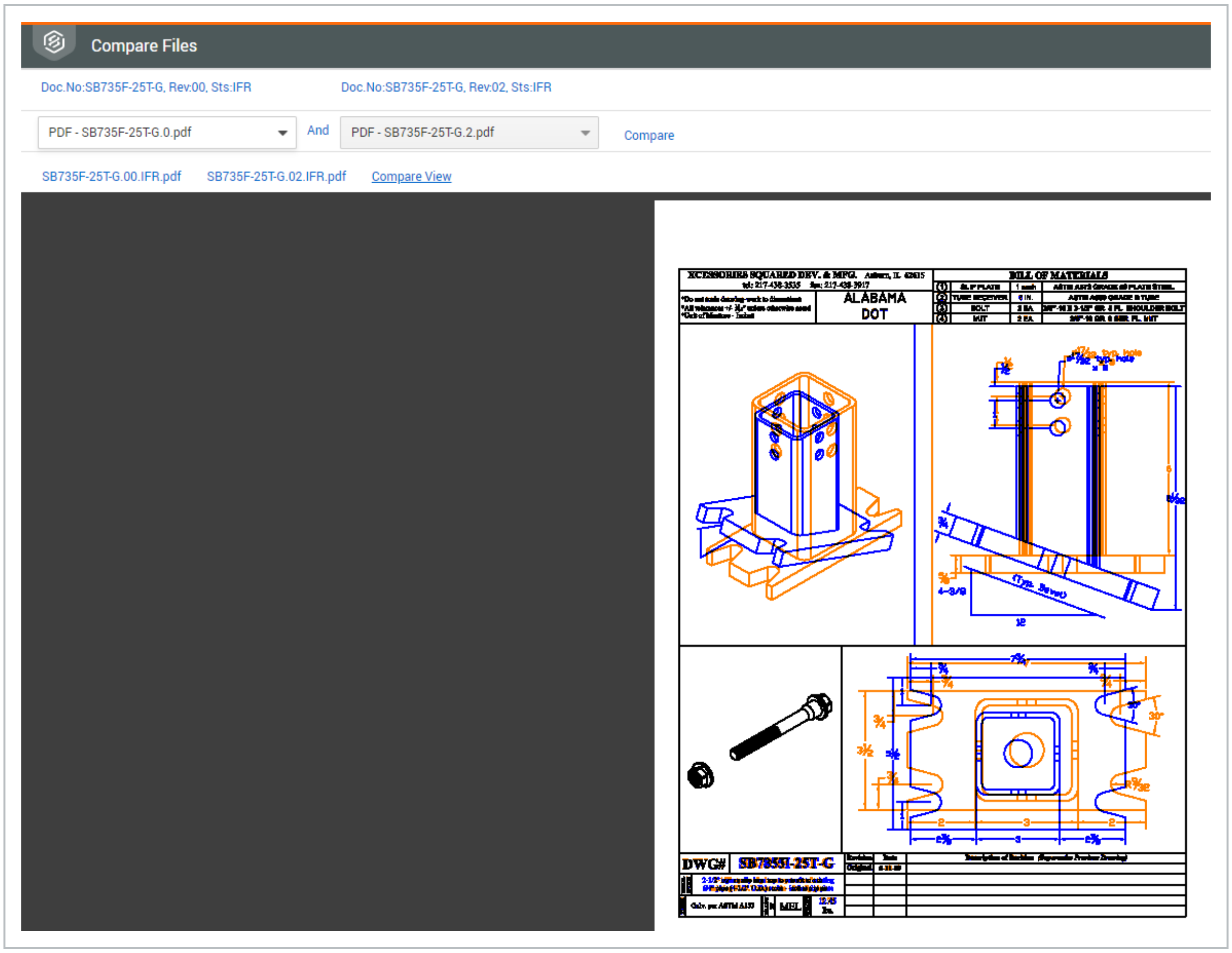
When you are in the Documents register, you can access the Compare feature to view two revisions of the same document side by side.

You can only compare two files.

1. From the Documents register, select one or two revisions of a document.
2. Click **Actions**, and then select **Compare**. If you selected two documents, the two revisions are overlaid on top of each other. If you selected only one document, continue with the next step.
3. At the prompt, select another revision of the document, and then click **Compare**.



The two documents are overlaid on top of each other in the Viewer. Items shown in blue indicate the newer revision. Items showing in orange indicate the older revision. Items showing in black indicate no change.

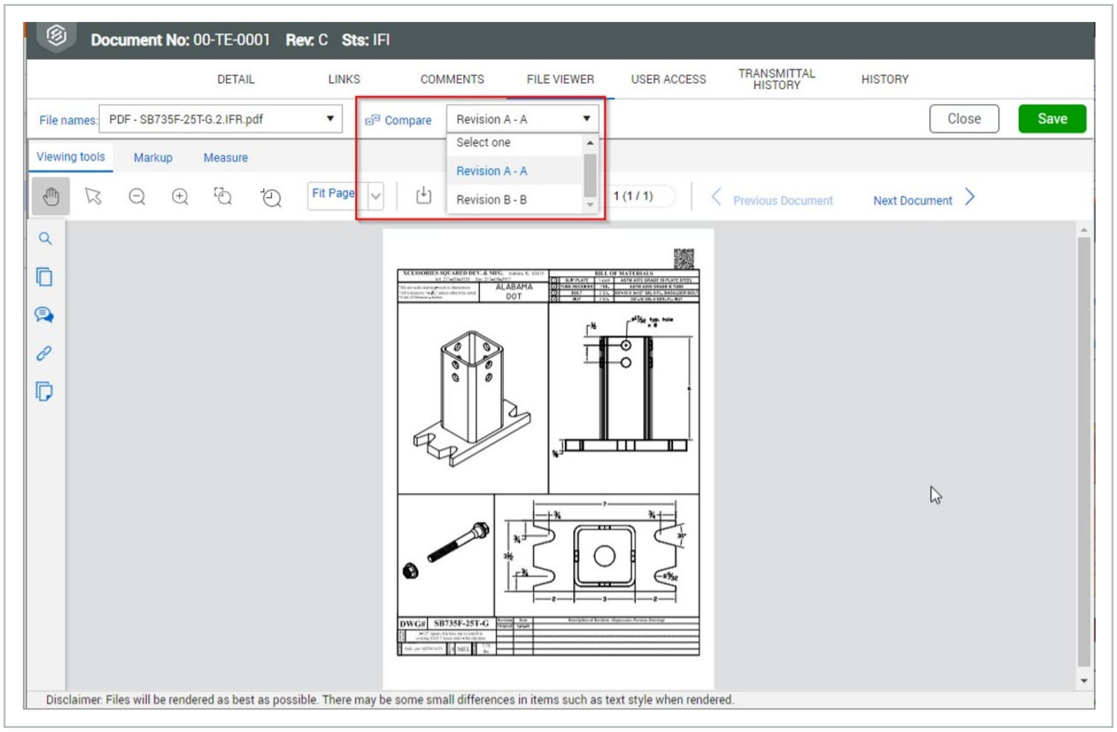


2.5 STEP BY STEP 3 – COMPARE TWO REVISIONS OF THE SAME DOCUMENT FROM THE PDF VIEWER

You can compare the current document in the PDF Viewer to a previous revision without returning to the Documents register.

You can only compare two revisions.

1. With a document open in the viewer, expand the Compare drop-down list.



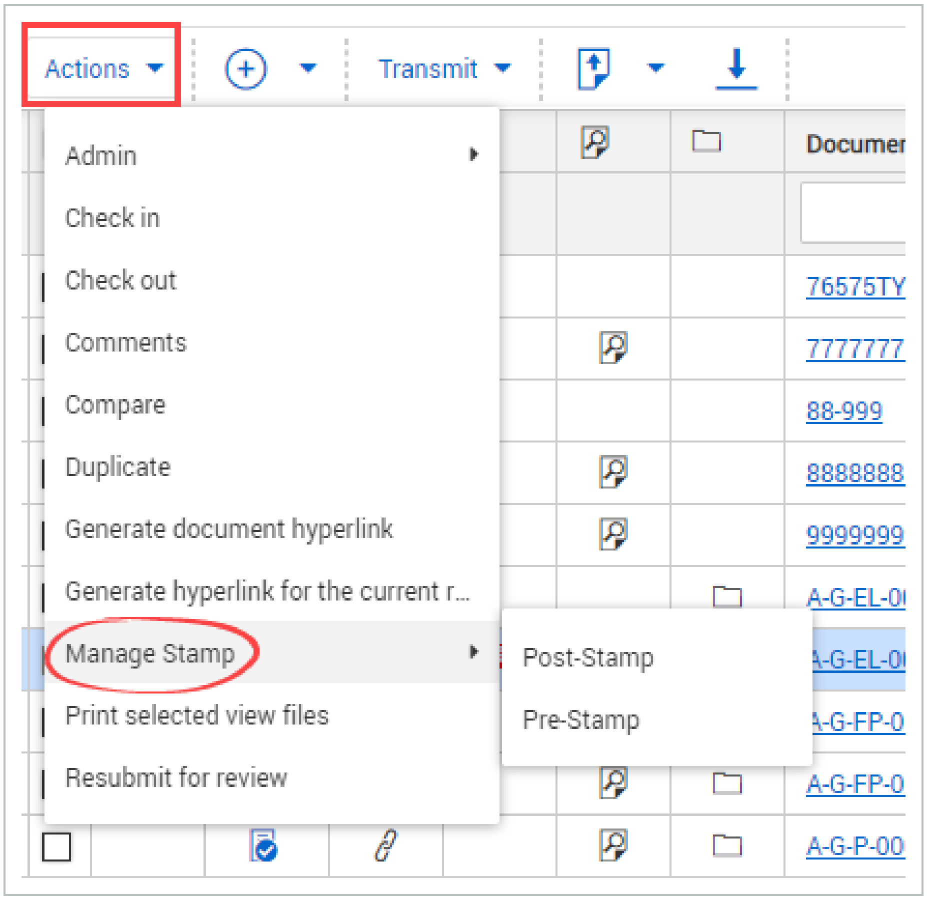
2. Select another revision of the document. The two revisions are overlaid on top of each other in the Viewer. Items shown in blue indicate the newer revision. Items showing in orange indicate the older revision. Items showing in black indicate no change.

2.6 STAMPING DOCUMENTS

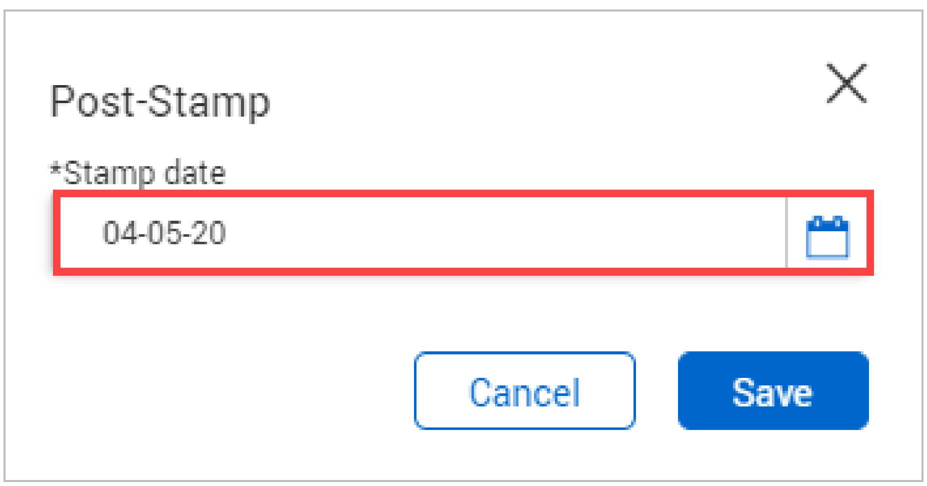
If the Vendor Data module is enabled, you can apply pre-review and post-review stamps to documents.

2.6.1 TO POST-STAMP A DOCUMENT:

1. Click **Actions**.
2. In the **Manage Stamp** menu, select **Post-Stamp**.



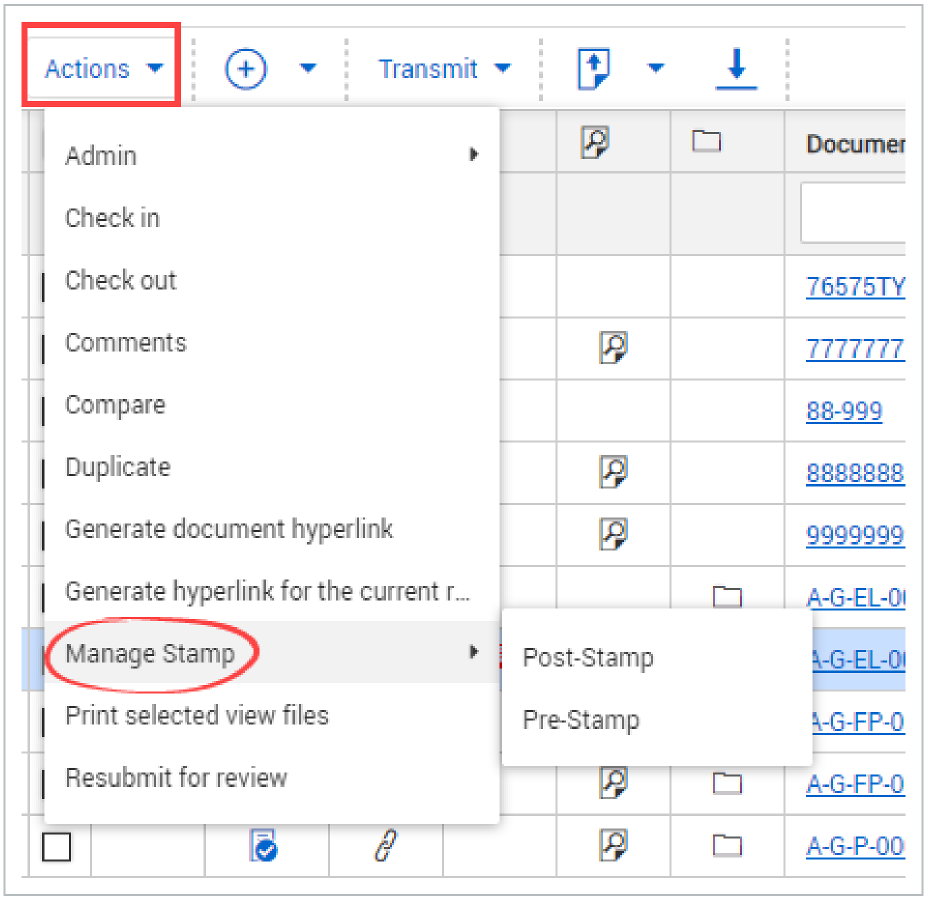
3. Select the date.



4. Click **Save**.

2.6.2 TO PRE-STAMP A DOCUMENT:

1. Click **Actions**.
2. In the **Manage Stamp** menu, select **Pre-Stamp**. The pre-stamp will be applied to the document.

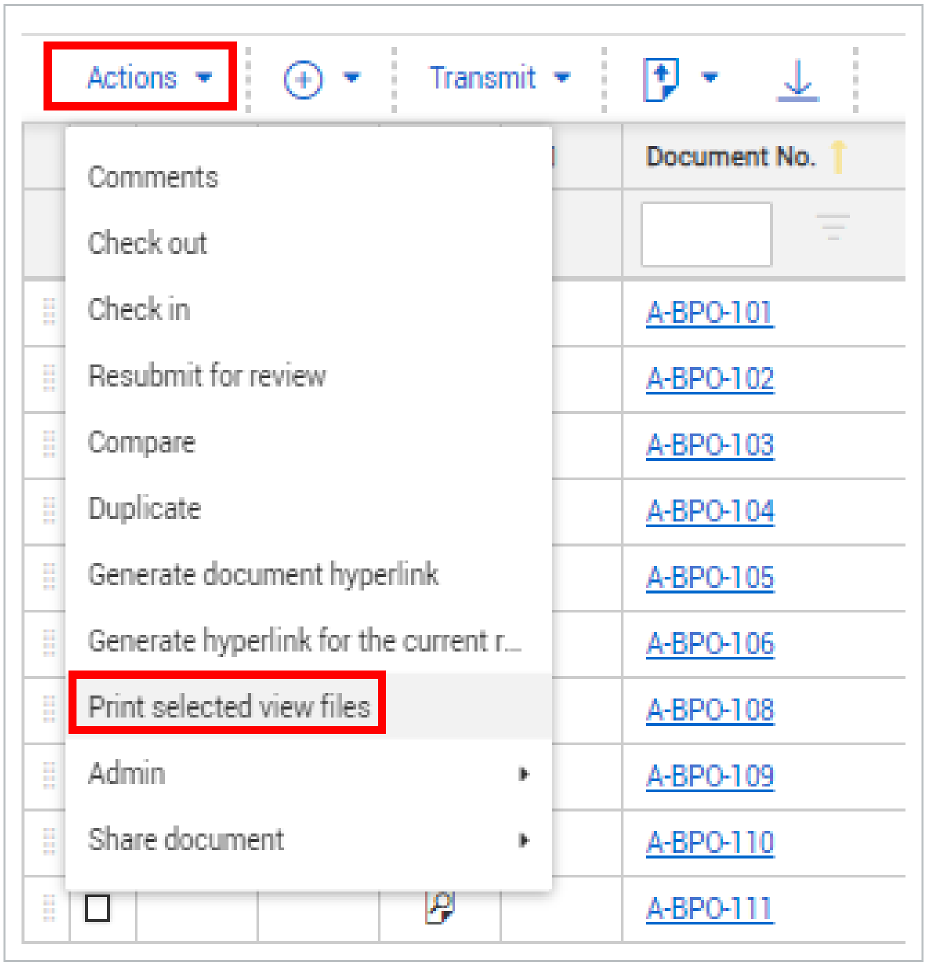


2.7 PRINTING DOCUMENT VIEW FILES

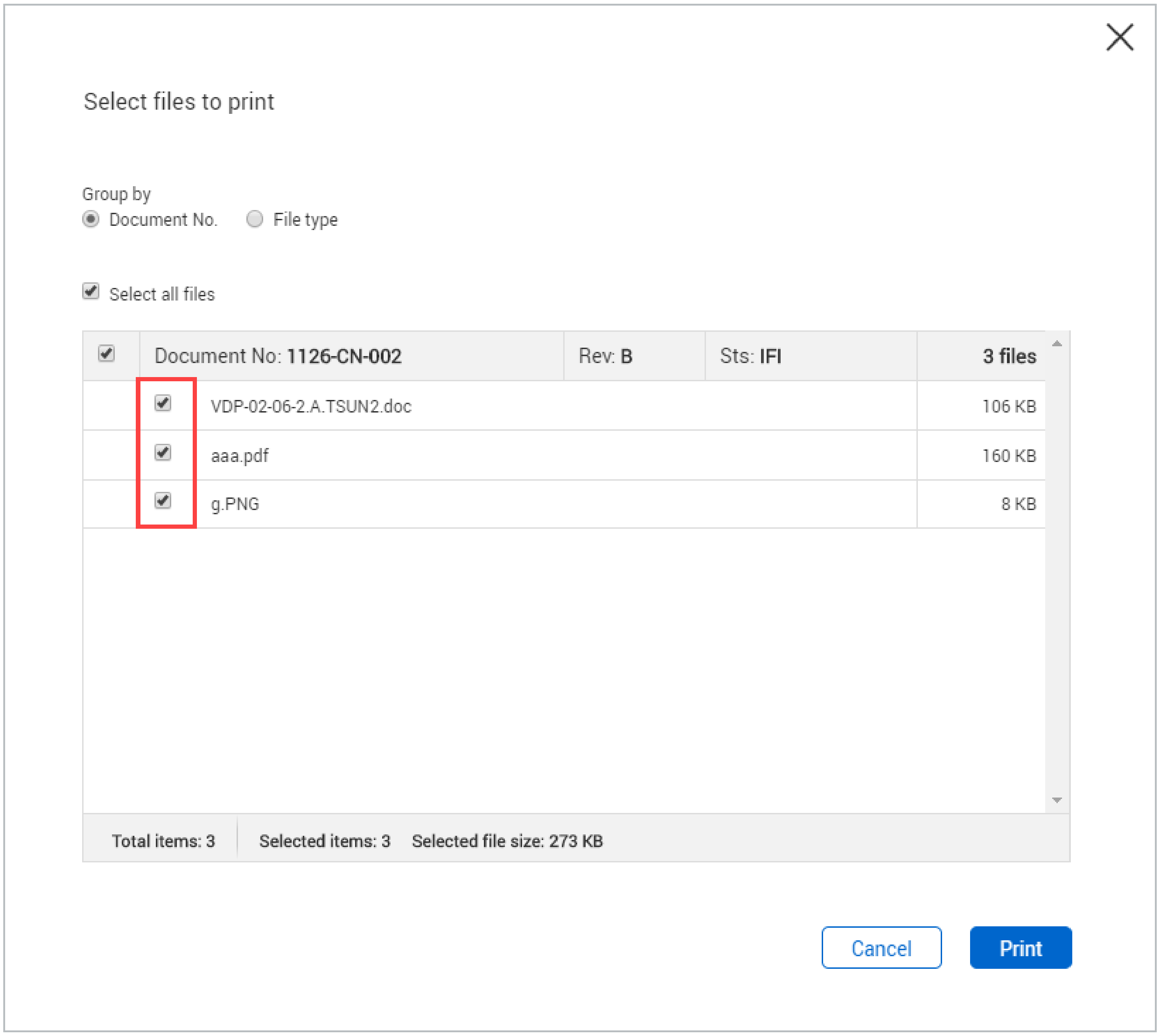
Print document view files directly from the Documents Register.

2.7.1 TO PRINT DOCUMENT VIEW FILES FROM THE REGISTER:

1. Click **Actions** and select **Print selected view files**.



2. Select the view files you want to print.



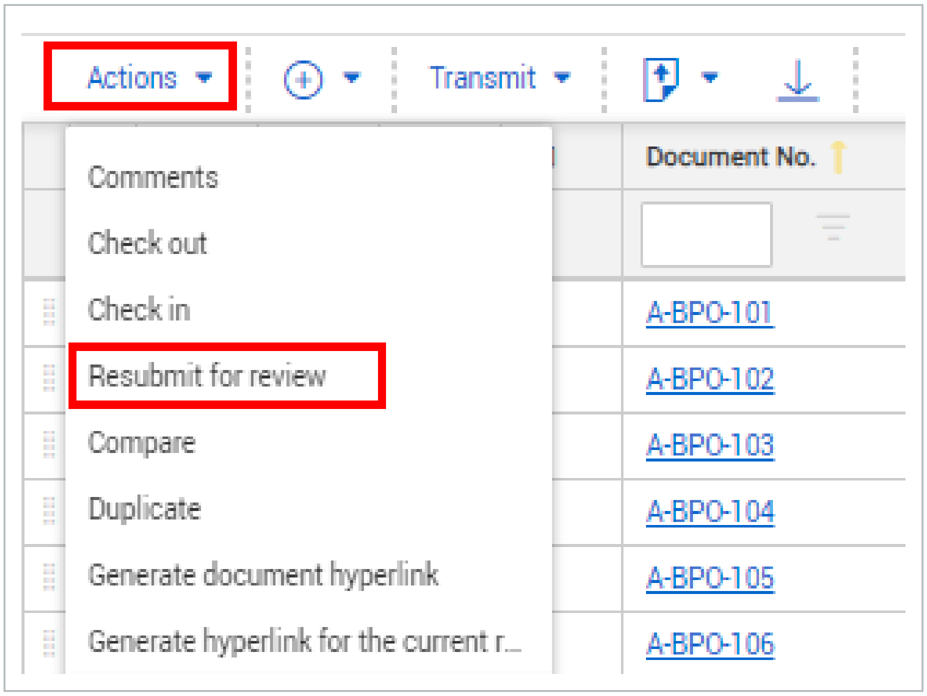
3. Click **Print**.

2.8 RESUBMITTING A DOCUMENT FOR REVIEW

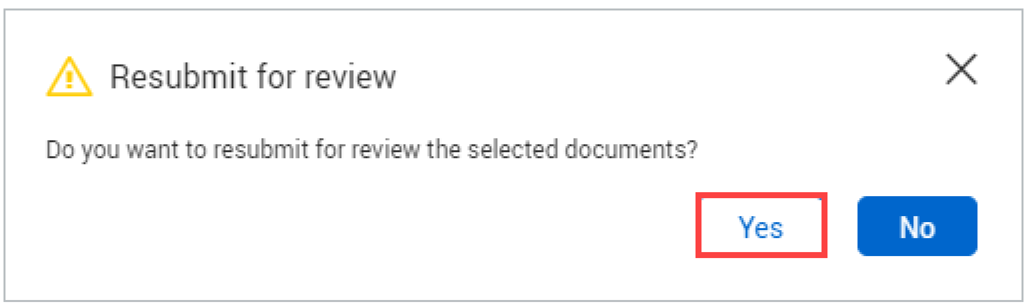
Resubmit documents for review directly from the Documents Register.

2.8.1 TO RESUBMIT A DOCUMENT FOR REVIEW:

1. Click **Actions** and select **Resubmit for review**.



2. Click **Yes**.



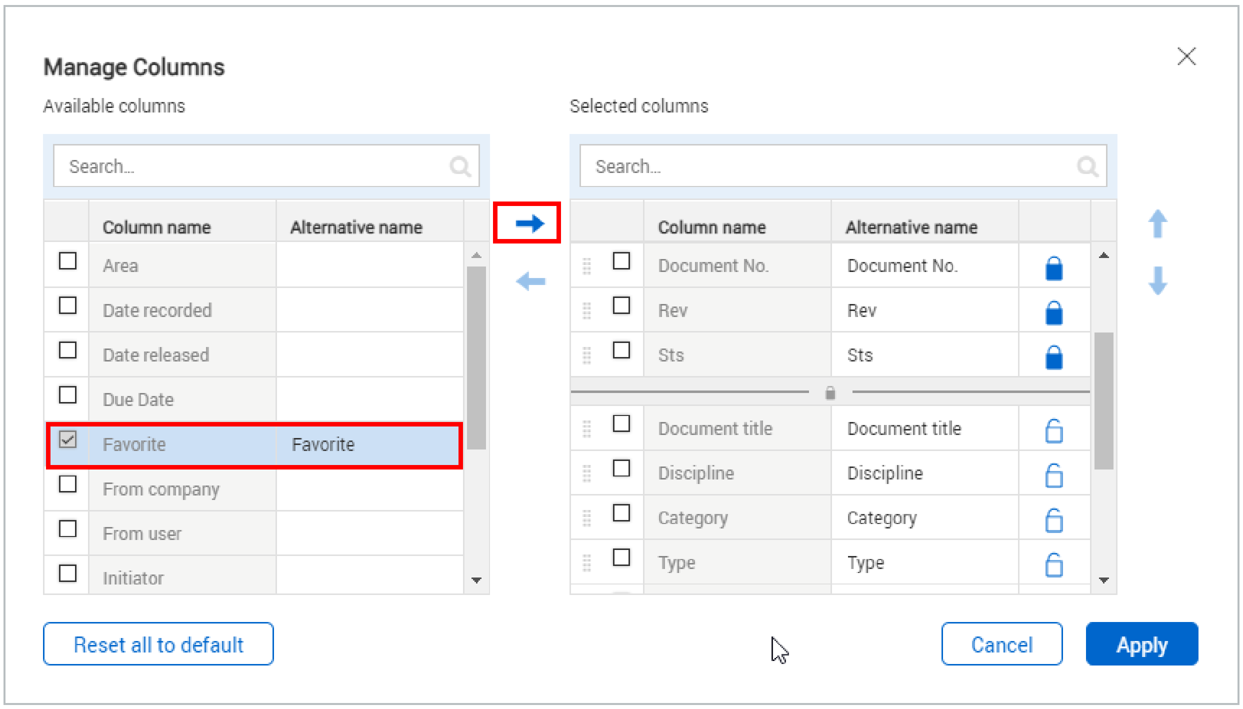
2.9 FAVORITING DOCUMENTS

Favorite documents to easily access them.

2.9.1 TO ACCESS THE FAVORITES COLUMN:

1. Click Manage columns.

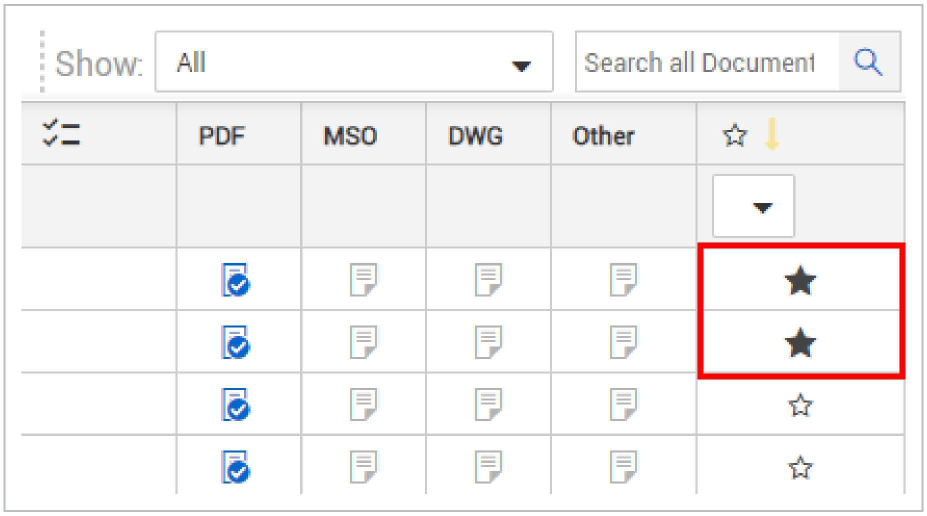
2. Select **Favorites** and click the **arrow icon**.



3. Click **Apply**.

2.9.2 TO FAVORITE A DOCUMENT:

1. In the Register, find the document you want to favorite.
2. Click the **favorite icon**.



2.10 LINK DOCUMENTS MANUALLY

If you are not sure all references in a document were hyperlinked when it was uploaded, you can run the hyperlinking process manually to ensure all references are hyperlinked. Running the hyperlinking process manually also lets you link to references whose document numbers did not exist when you first uploaded the document

To run the hyperlinking process, select one or more documents in the Documents register, and then select **Bulk link PDFs** from the **Actions** menu. A notification briefly shows that the request has been submitted successfully. The document hyperlinking process runs in the background.

CHAPTER 3 – MANAGING DOCUMENTS

The Documents Register makes managing documents easy. You can manage documents by performing different actions on them.

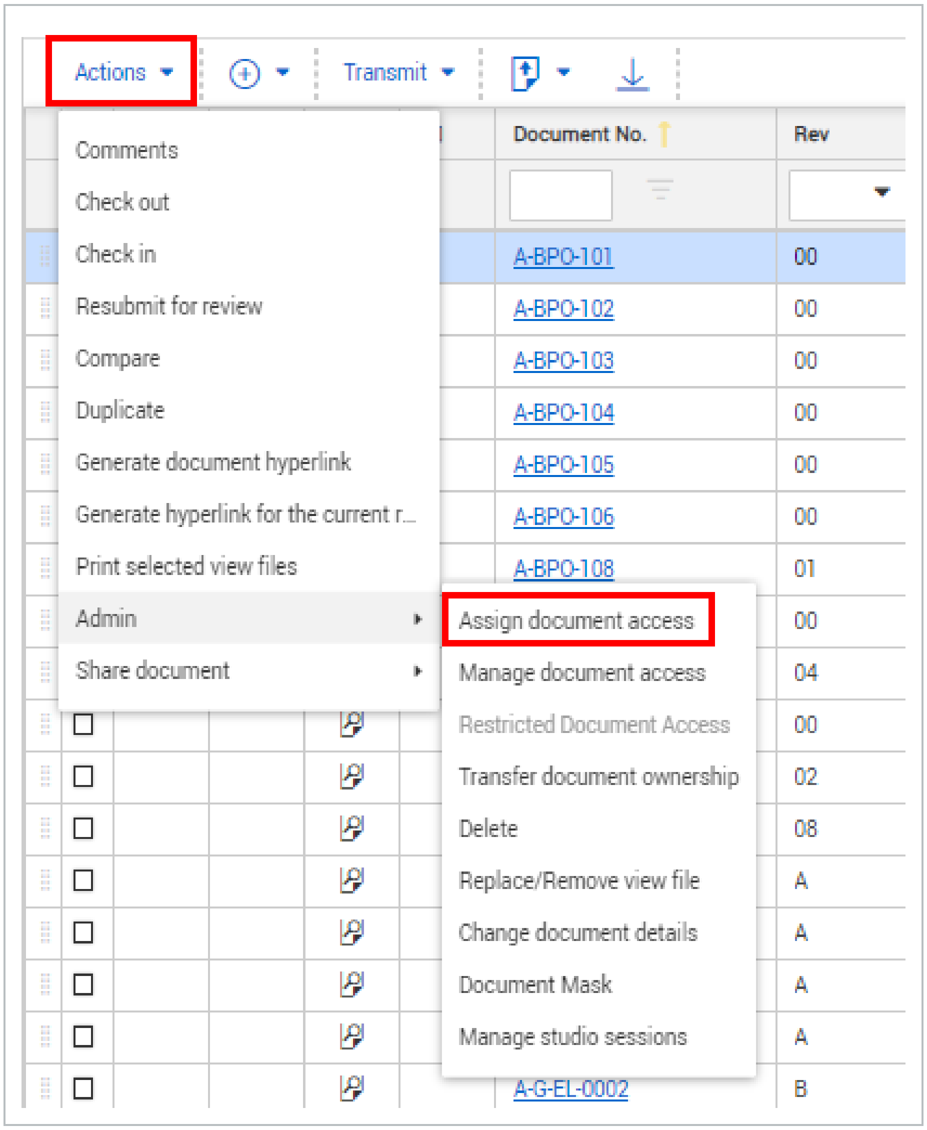
See the links below for information on how to manage documents.

3.1 ASSIGNING ACCESS TO DOCUMENTS

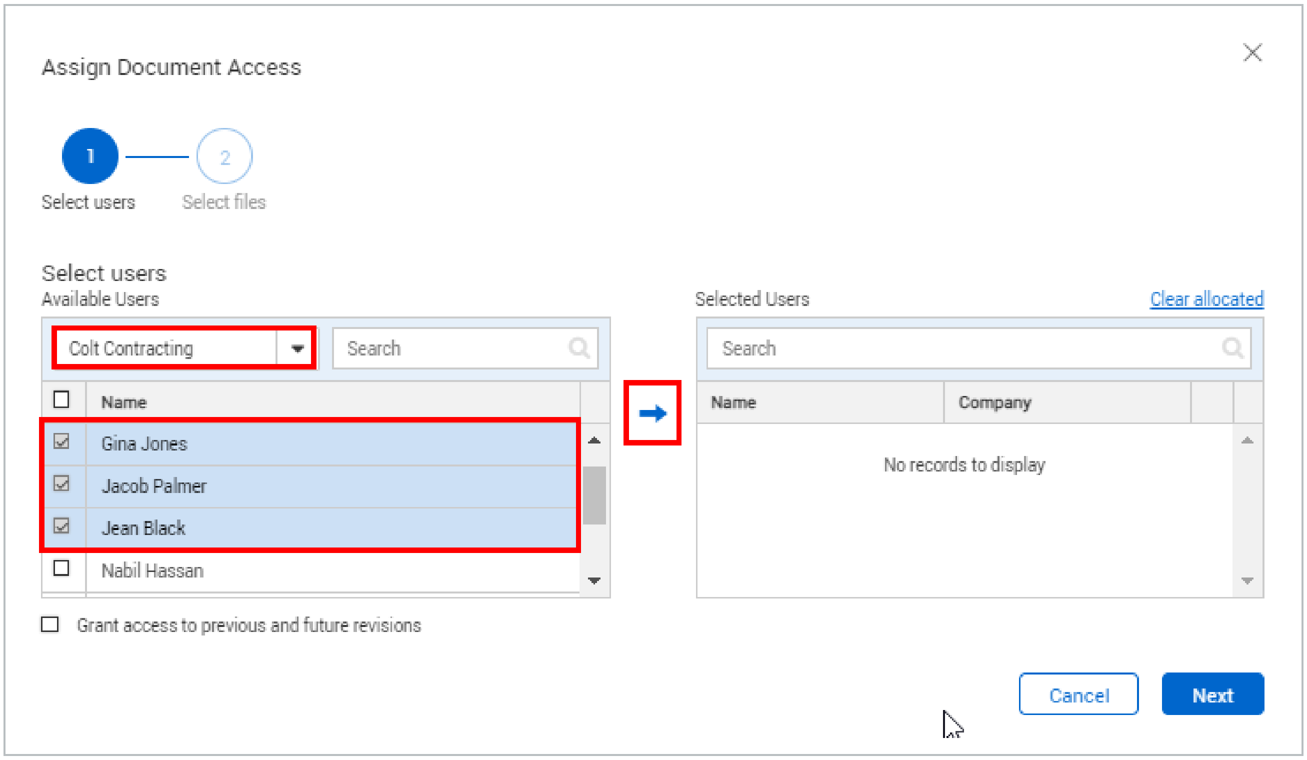
Project or company administrators can give access to a specific document or document format. This ability is also available to users within a security group that has this security access function allowed.

3.1.1 TO ASSIGN ACCESS TO A DOCUMENT:

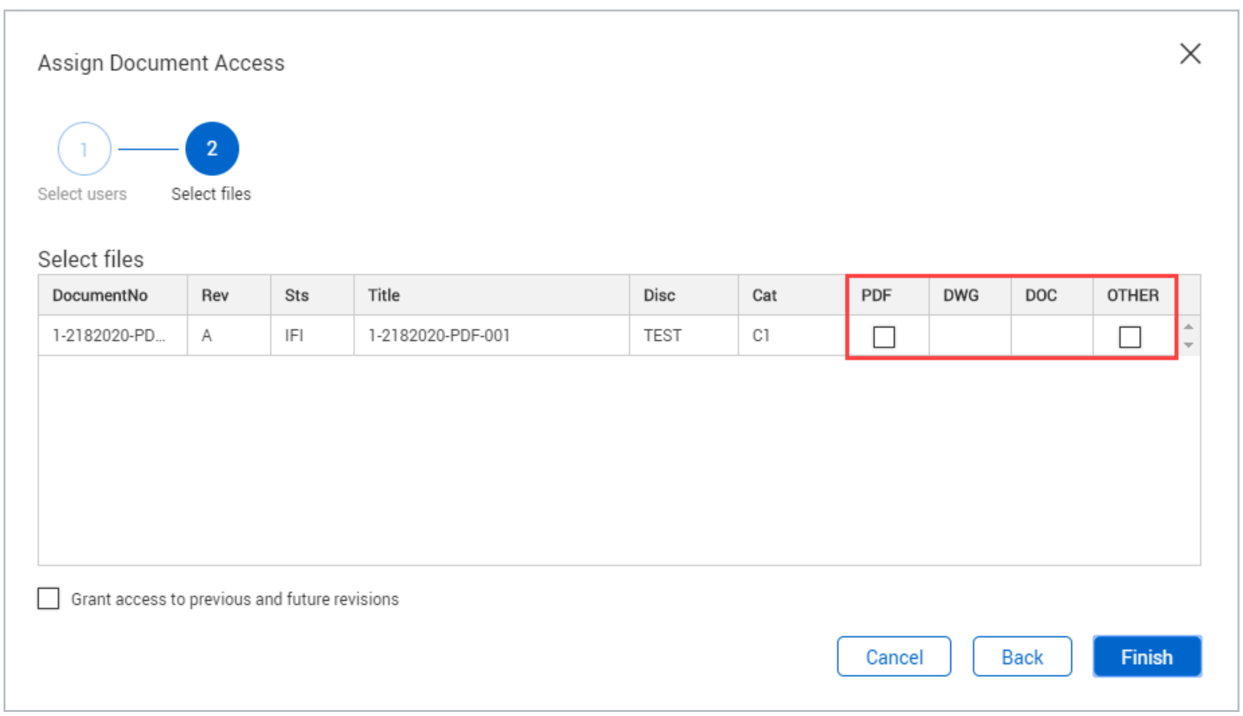
1. Select the document in the**Register**.
2. Click **Actions**.
3. In the **Admin** menu, select **Assign document access**.



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



6. Click **Next**.
7. Select the formats you want to the document to be available in.



8. Click **Finish**.

NOTE The option to allow users to automatically get access to future revisions can be removed from the system completely if required. Contact InEight for details.

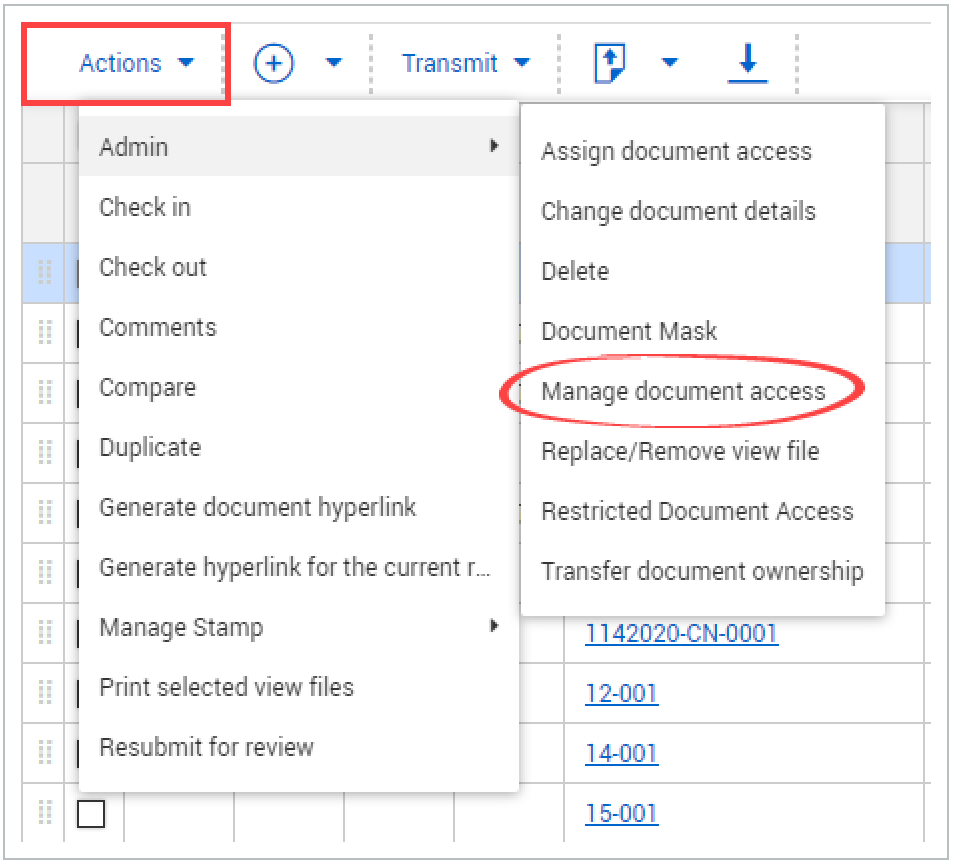
3.2 MANAGING DOCUMENT ACCESS

Users who have gained access to documents in InEight Document via transmittals get access to new revisions of the same documents by default, unless **Notify recipients of future revisions** was not selected.

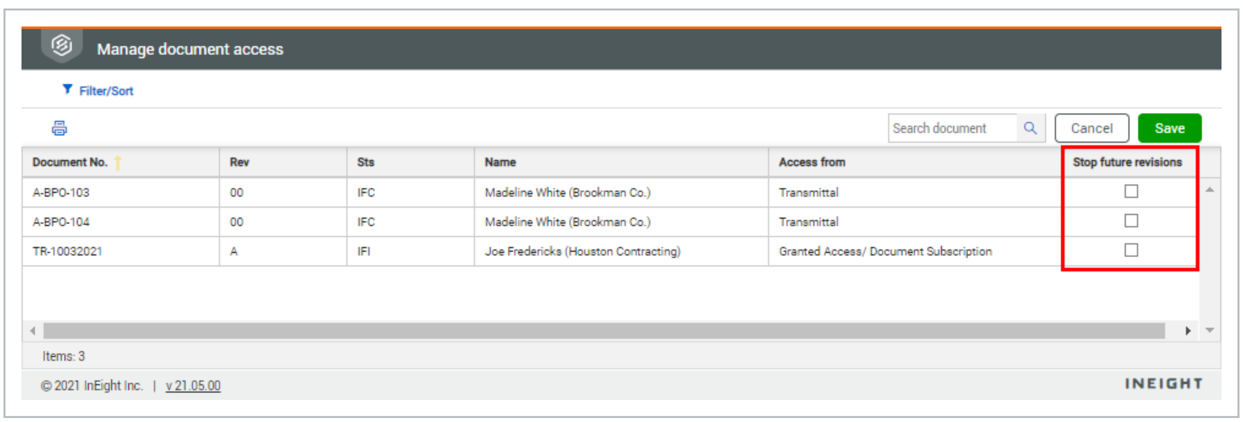
A user’s access to future revisions of one or more documents can be removed using the manage document access function.

3.2.1 TO REMOVE ACCESS TO FUTURE REVISIONS OF A DOCUMENT:

1. Select the document in the Register.
2. Click **Actions**.
3. In the **Admin** menu, select **Manage document access**.



4. Select the check boxes of the users you want to remove access to.



5. Click Save.

NOTE	When selecting Stop future revisions, this will also stop the user from getting access to future revisions of documents to which they received access via subscription or by the project administrator granting them access.

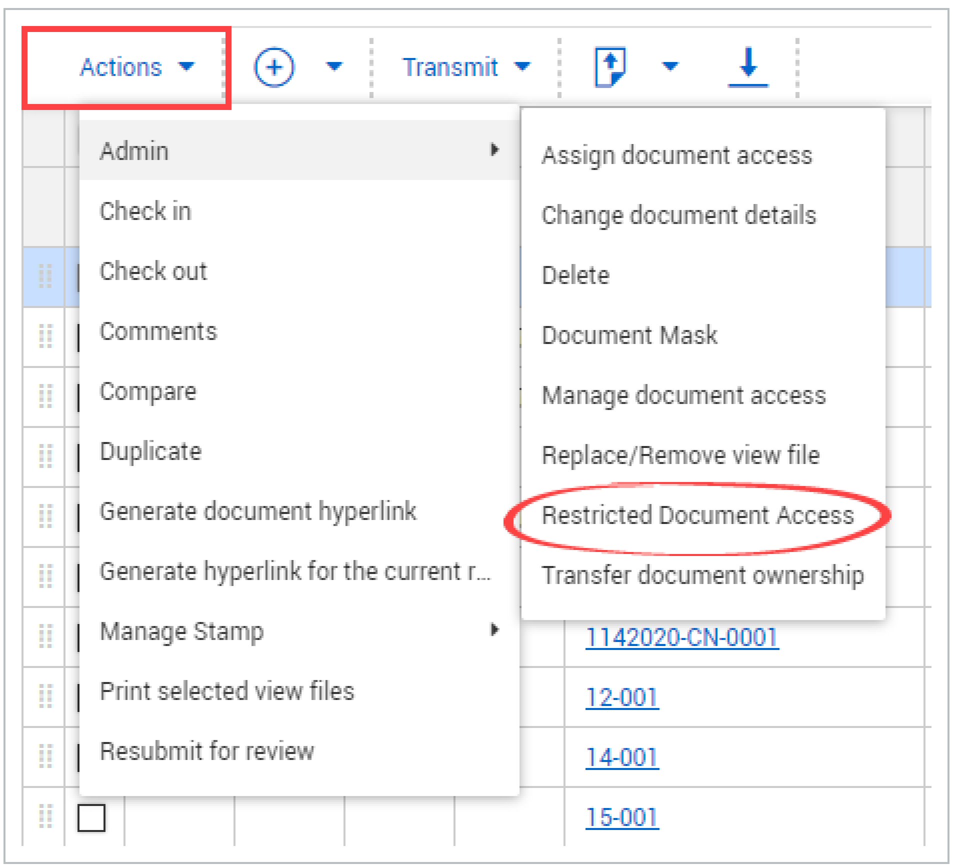
3.3 MANAGING RESTRICTED DOCUMENTS

Sensitive documents can be hard to manage and require special clearances for access. This functionality lets administrators define which documents are restricted from the typical project configured access and security settings and which users are authorized to view them. For example, documents governed by the restricted document filter will not be subject to applicable distribution rules that may also affect this document. Once defined, those documents cannot be transmitted to unauthorized users.

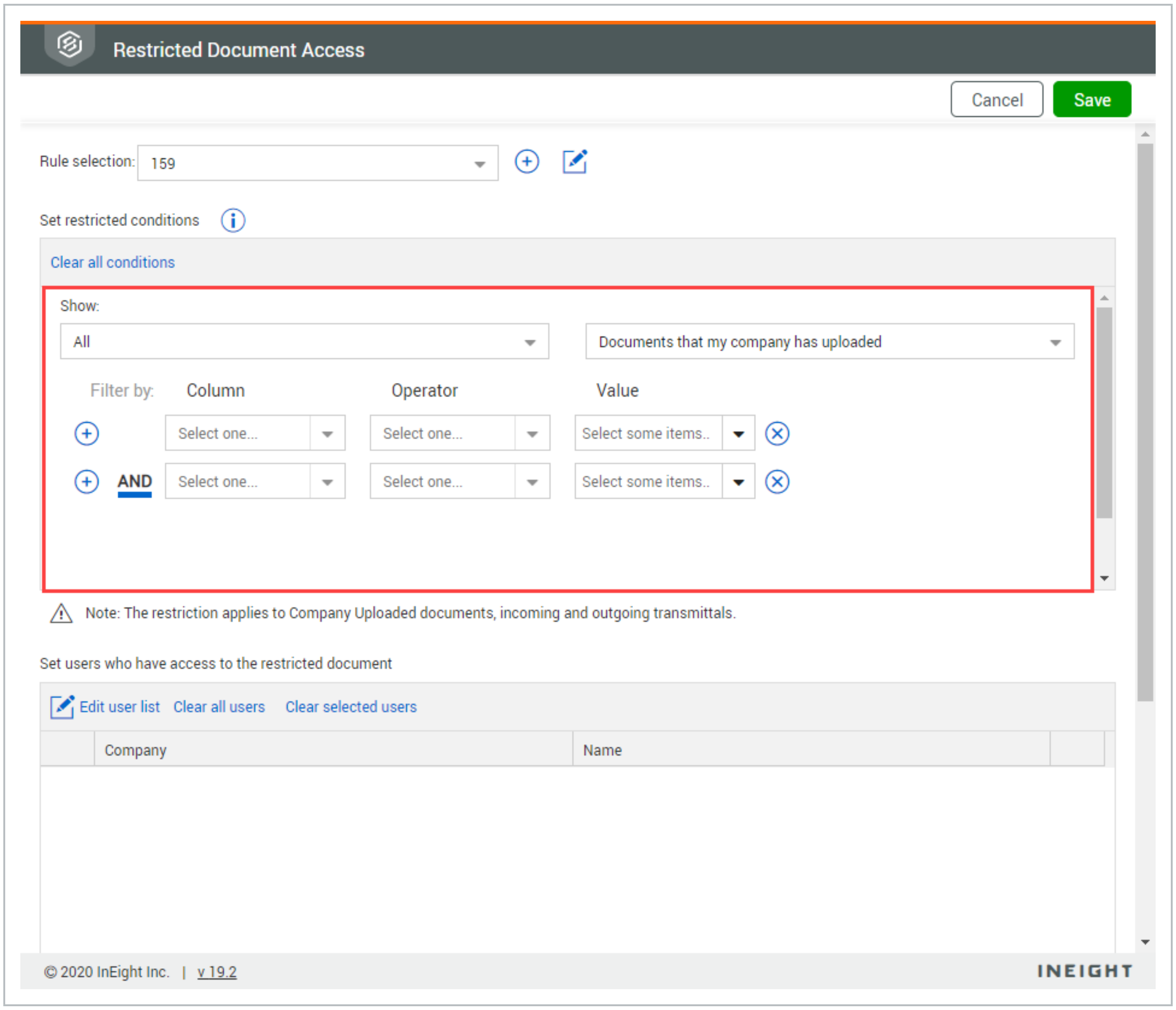
If you are interested in enabling this on your project, contact support@ineight.com.

3.3.1 TO RESTRICT DOCUMENT ACCESS:

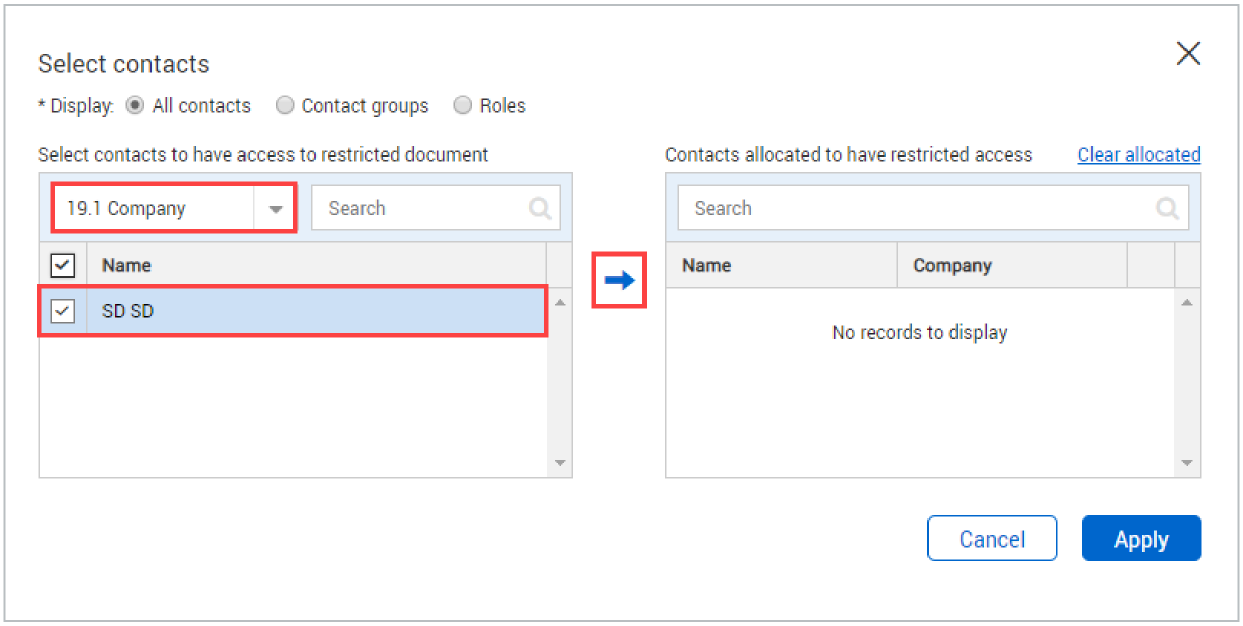
1. Select the document in the **Register**.
2. Click **Actions**.
3. In the **Admin** menu, select **Restricted Document Access**.



4. Set the restricted conditions for the document.



5. Click **Edit user list**.
6. Select the company.
7. Select the contact and click the **arrow icon**.



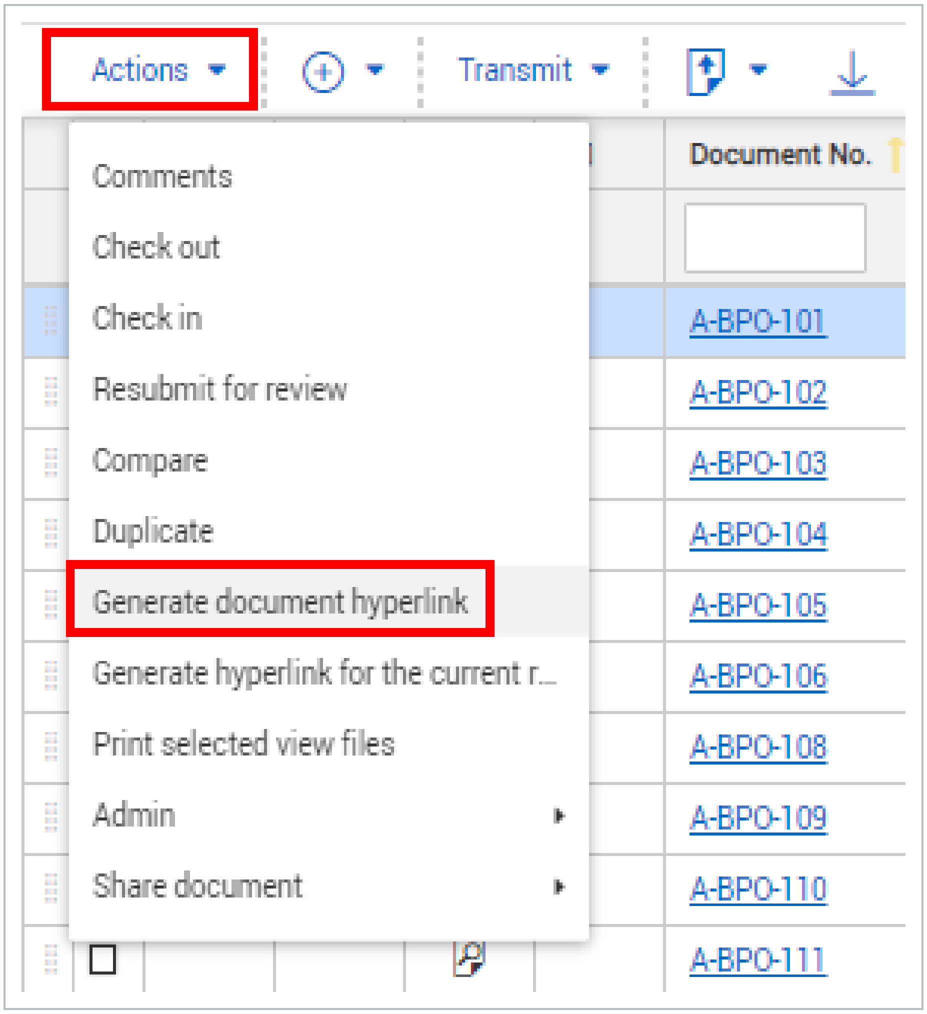
8. Click **Apply**.
9. Click **Save**.

3.4 GENERATING DOCUMENT HYPERLINKS

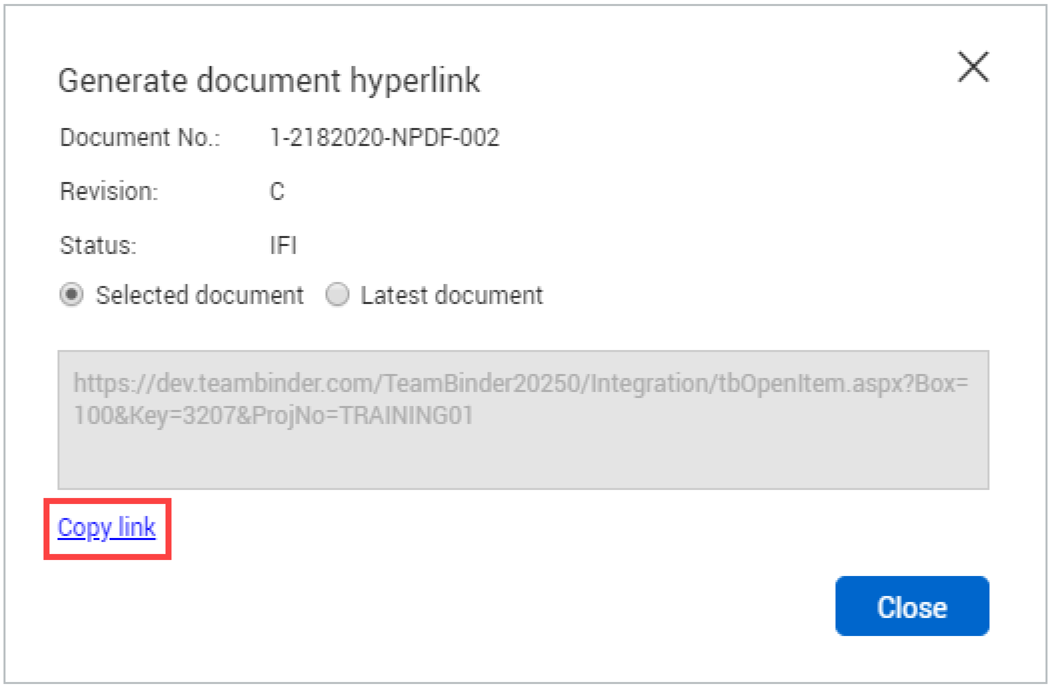
A hyperlink to a document can be sent to another user that will take them directly to the document.

3.4.1 TO GENERATE A DOCUMENT HYPERLINK:

1. Select the document in the **Register**.
2. Click **Actions** and select **Generate document hyperlink**.


Actions
Transmit
Document No.
Comments
Check out
Check in
Resubmit for review
Compare
Duplicate
Generate document hyperlink
Generate hyperlink for the current r...
Print selected view files
Admin
Share document
A-BPO-101
A-BPO-102
A-BPO-103
A-BPO-104
A-BPO-105
A-BPO-106
A-BPO-108
A-BPO-109
A-BPO-110
A-BPO-111

3. Click **Copy link**.



4. Click **Close**.

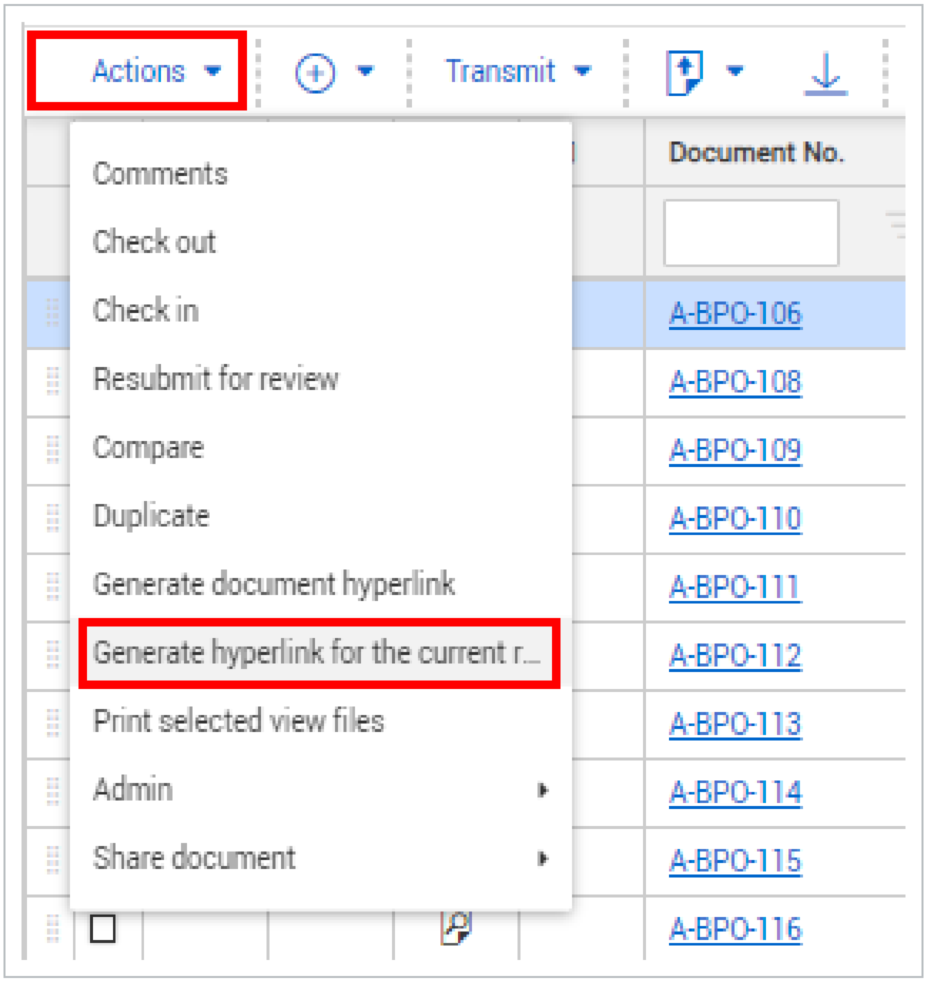
> NOTE
>
> - The recipient of the hyperlink must have access to the document.
> - The recipient of the link must log in to InEight document to view the document.
> - Generate a hyperlink for the current Register view by selecting **Generate hyperlink for the current Register**. This will show the latest documents uploaded to the Register that the user has access to.

3.5 GENERATING A HYPERLINK FOR THE CURRENT REGISTER

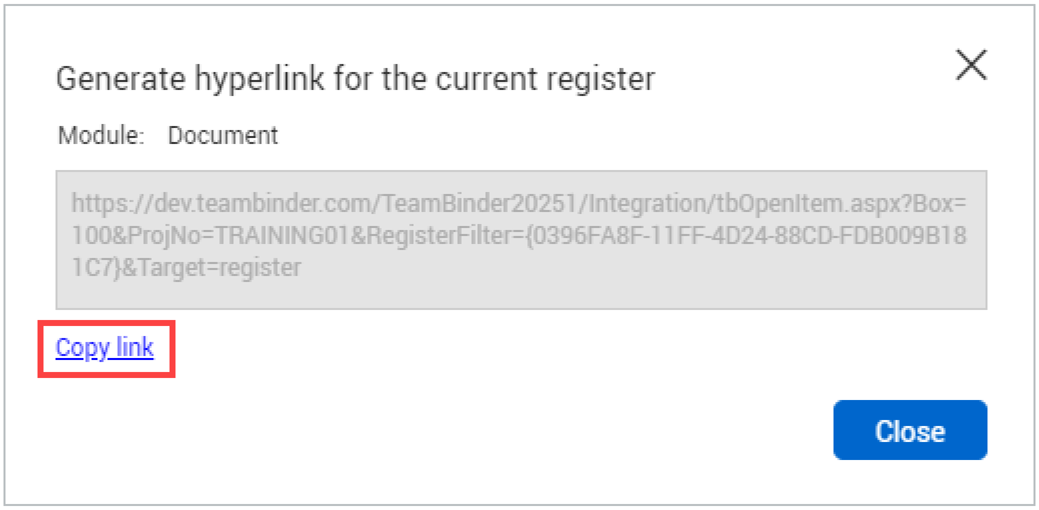
A hyperlink to the current **Documents Register** can be sent to another user that will take them directly to the current Register view.

3.5.1 TO GENERATE A HYPERLINK FOR THE CURRENT REGISTER:

1. Click **Actions** and select **Generate hyperlink for the current Register**.



2. Click **Copy link**.



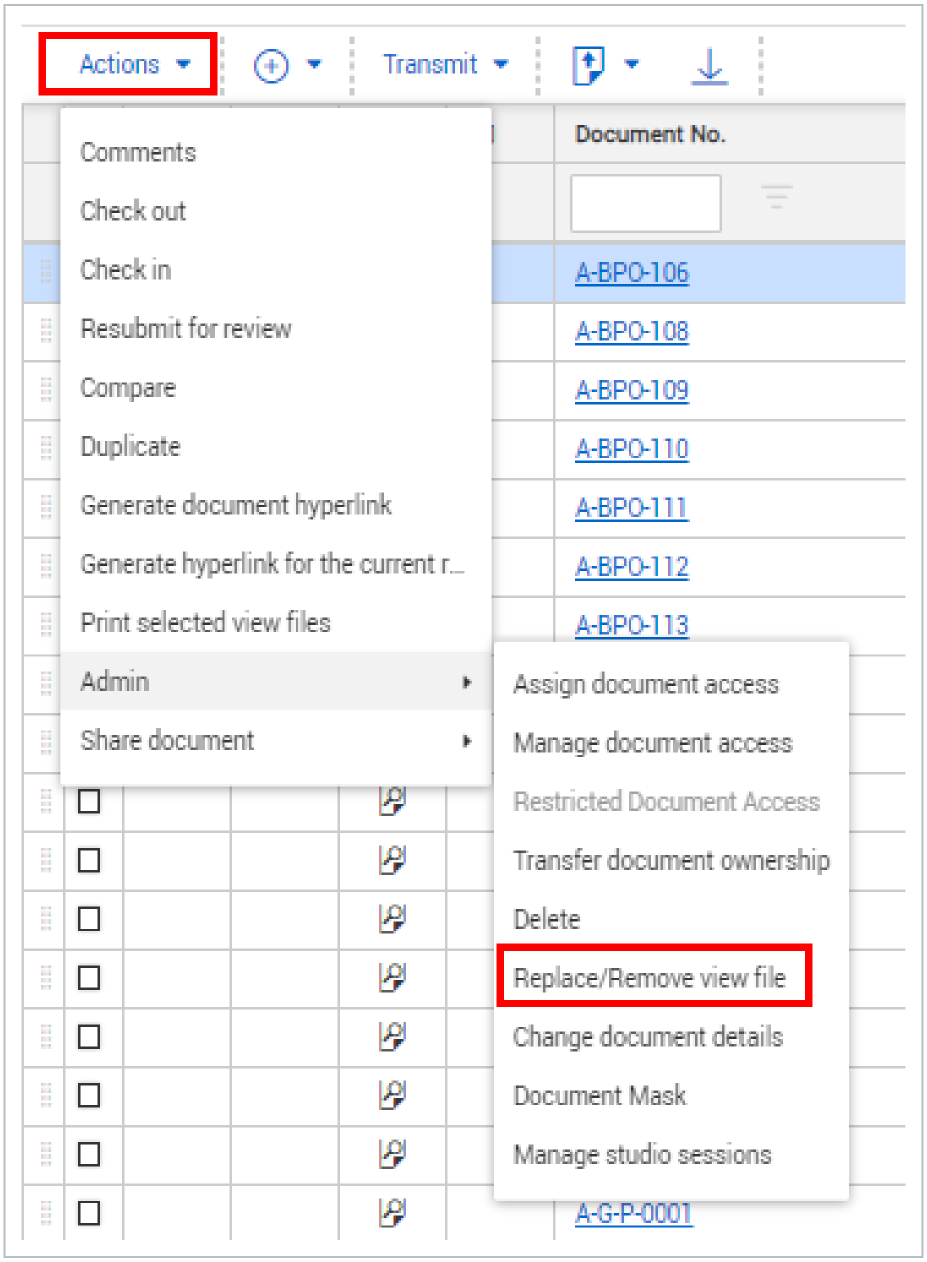
3. Click **Close**.

3.6 REPLACING AND REMOVING VIEW FILES

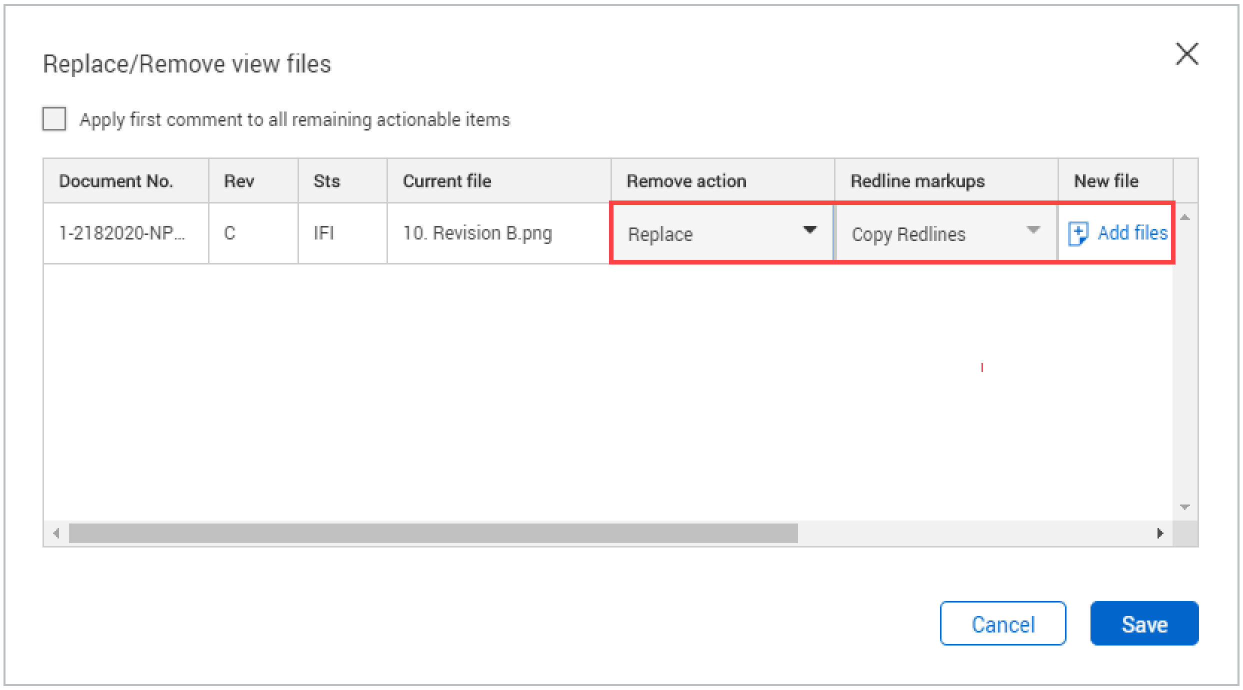
Replace and remove document view files to keep documents up to date.

3.6.1 TO REPLACE A VIEW FILE:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Replace/Remove view file**.



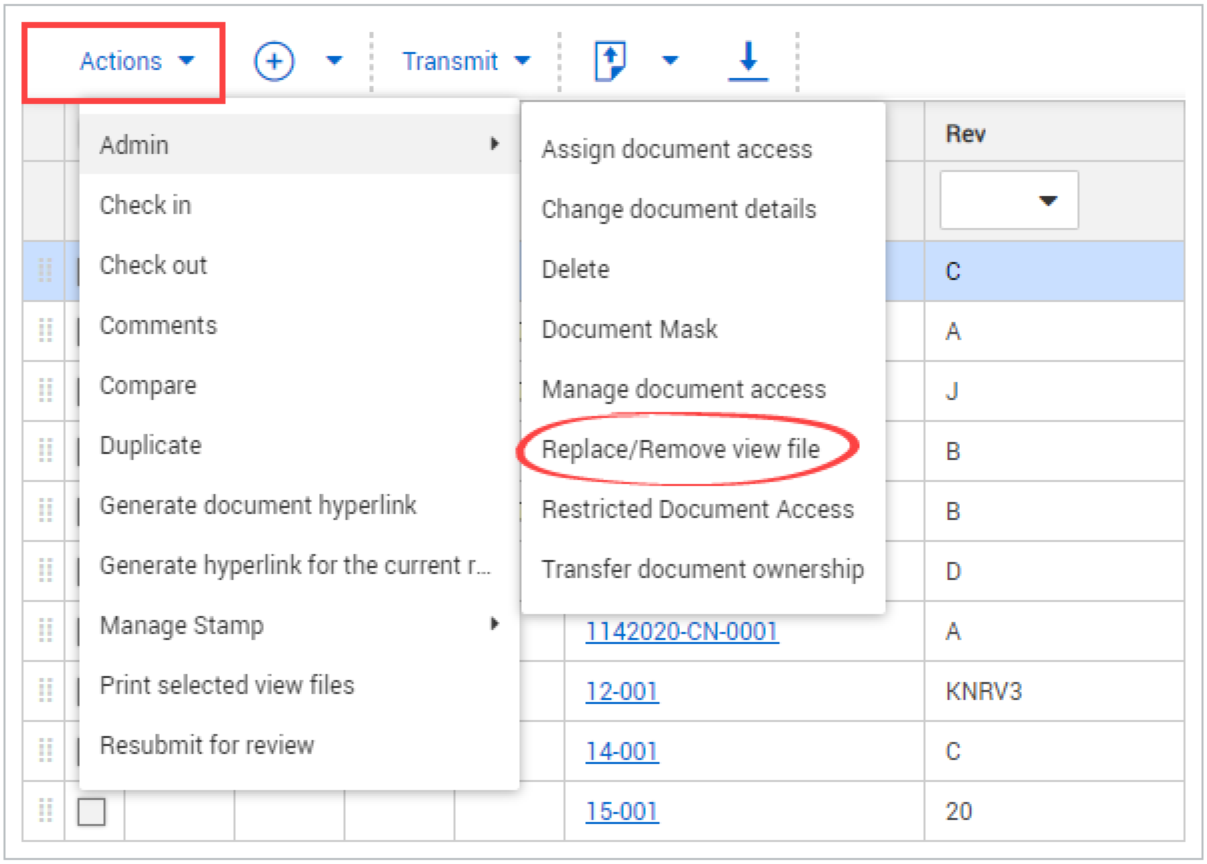
4. Select **Replace**.
5. Select either **Copy Redlines** or **Remove Redlines**.
6. Click **Add files** to upload a new file.



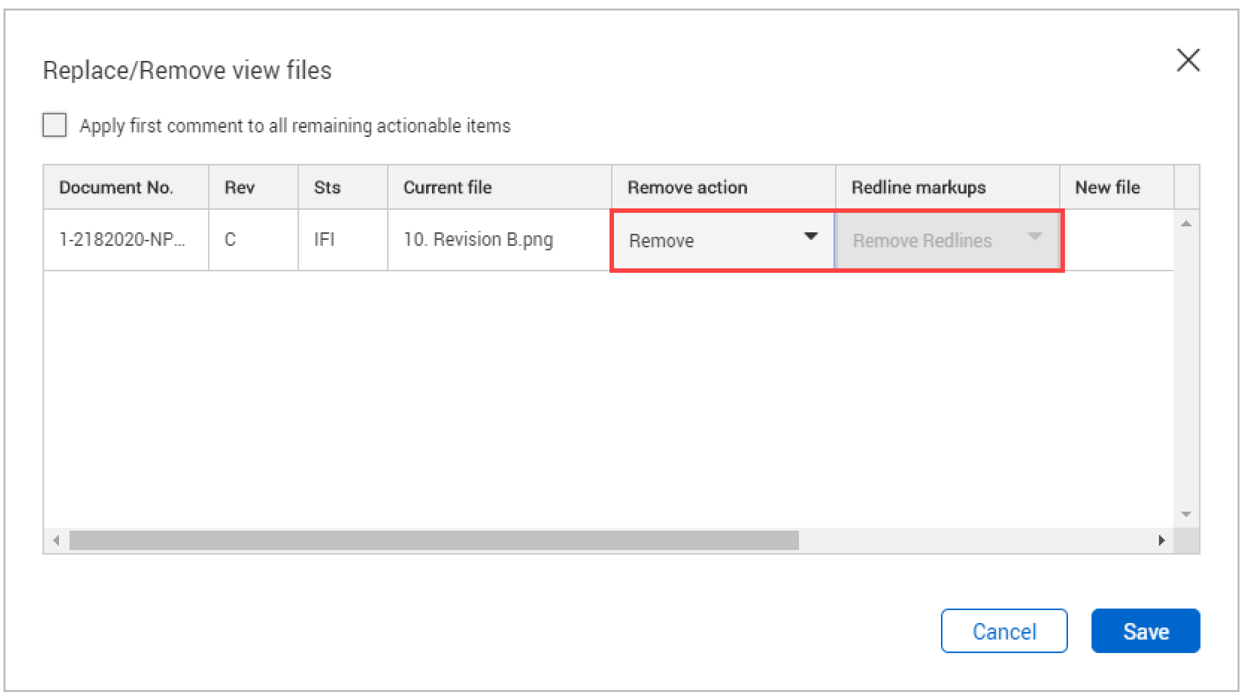
7. Click **Save**.

3.6.2 TO REMOVE A VIEW FILE:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Replace/Remove view file**.



4. Select **Remove**. By default, Redline markups will be set to **Remove Redlines**.



5. Click **Save**.

NOTE View files can only be replaced for documents with the following statuses:

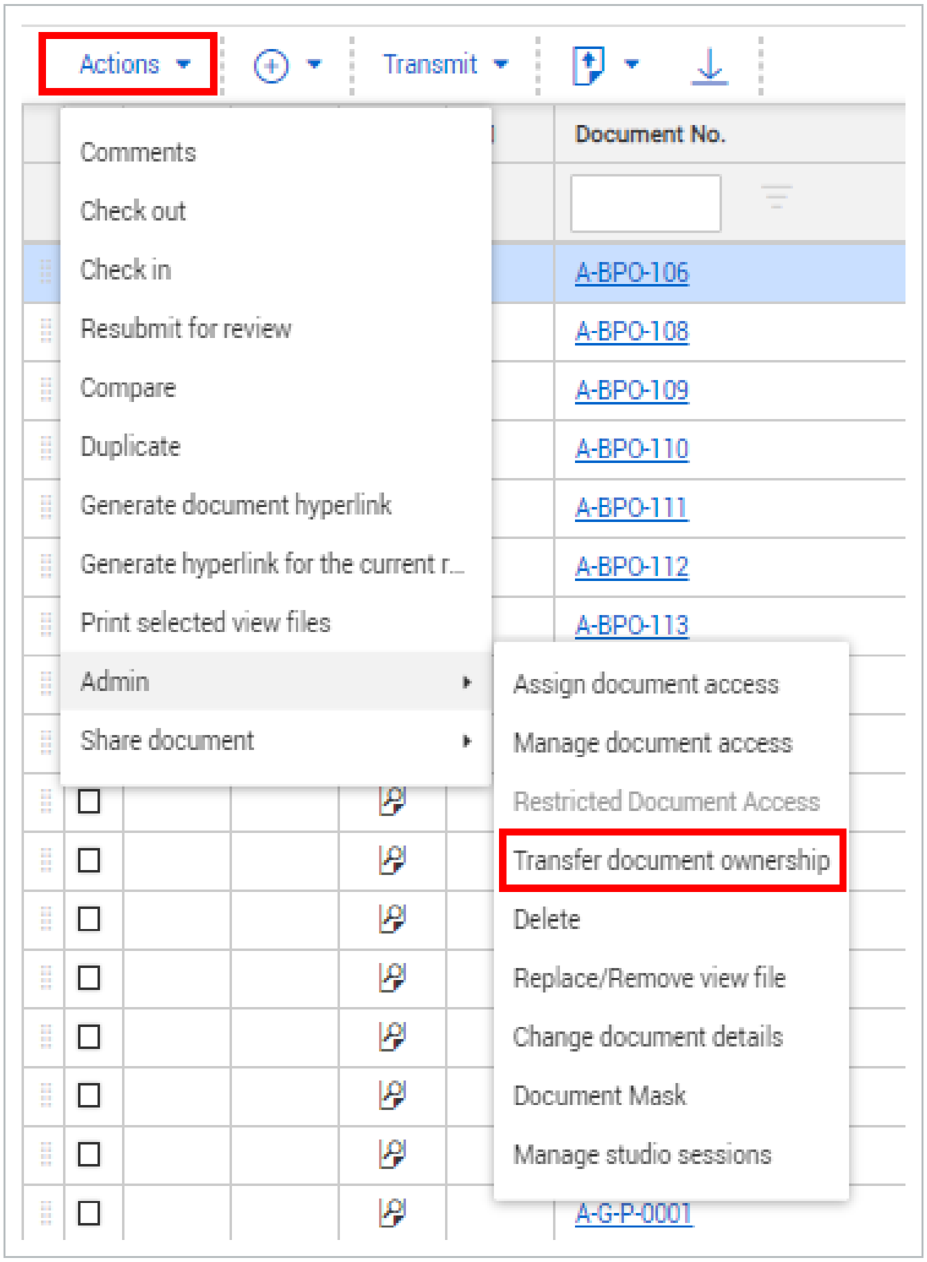
- Unrestrained.
- Restrained where the workflow has not been activated.
- Restrained documents awaiting release where the review type is single (not serial or parallel).

3.7 TRANSFERRING DOCUMENT OWNERSHIP

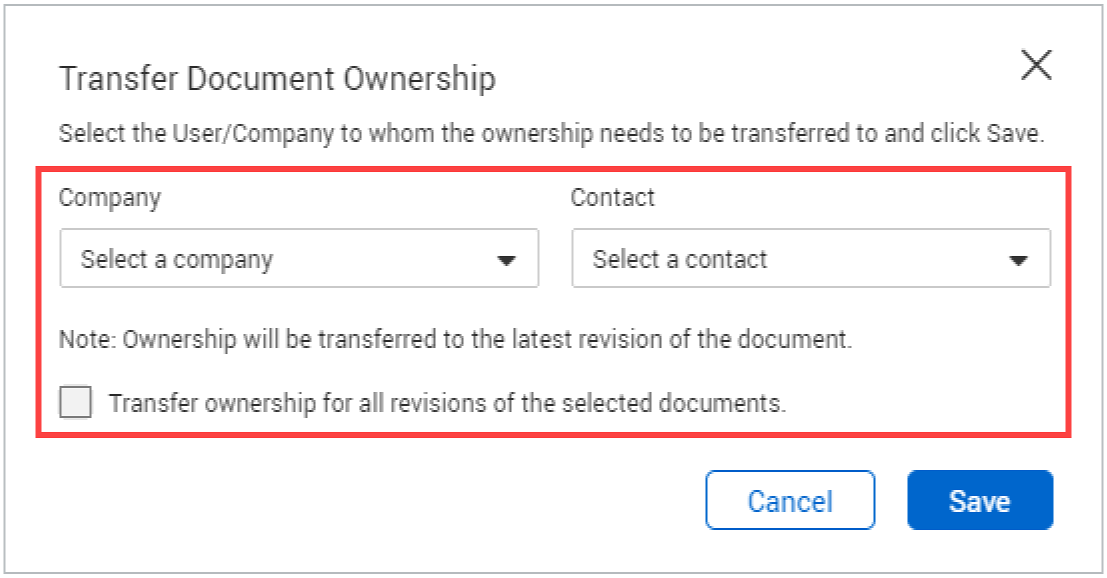
You might need to transfer document ownership to another company if they need to upload ongoing revisions. An example of this is when the early revisions of a document are uploaded on behalf of another company before a document controller is appointed.

3.7.1 TO TRANSFER DOCUMENT OWNERSHIP:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Transfer document ownership**.



4. Select the company you're transferring ownership to.
5. Select the contact for the company.
6. If you want to transfer all revisions of the document to the company, select the check box.



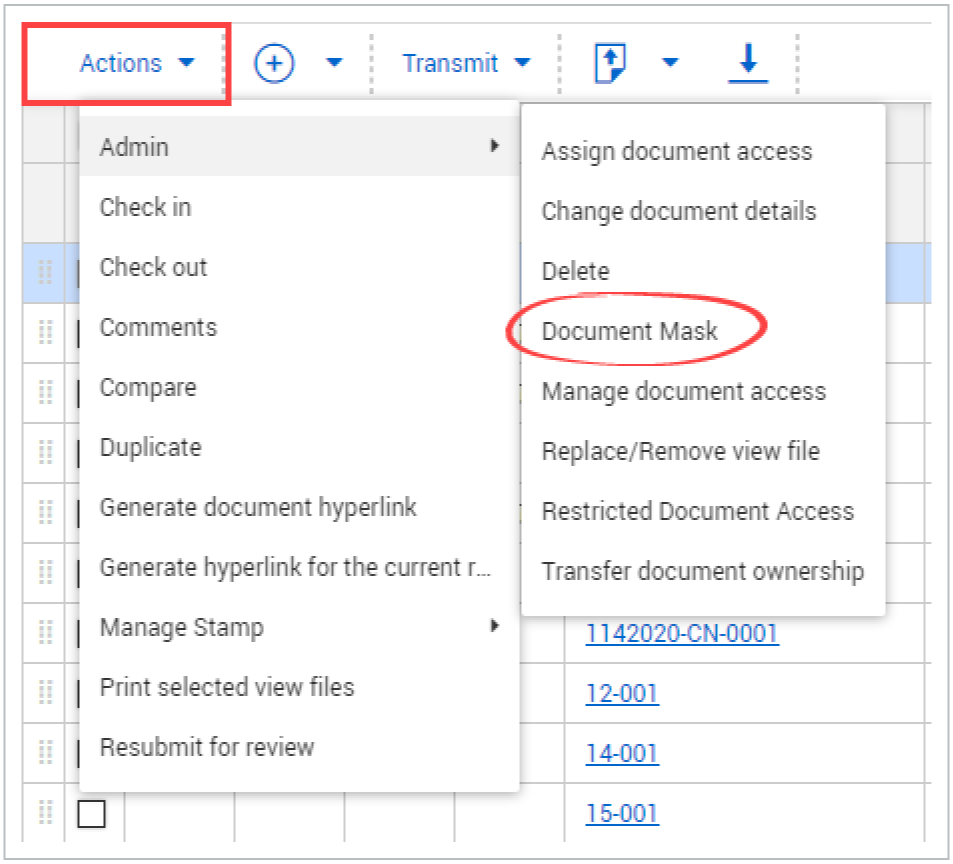
7. Click **Save**.

3.8 APPLYING DOCUMENT NUMBER MASKS

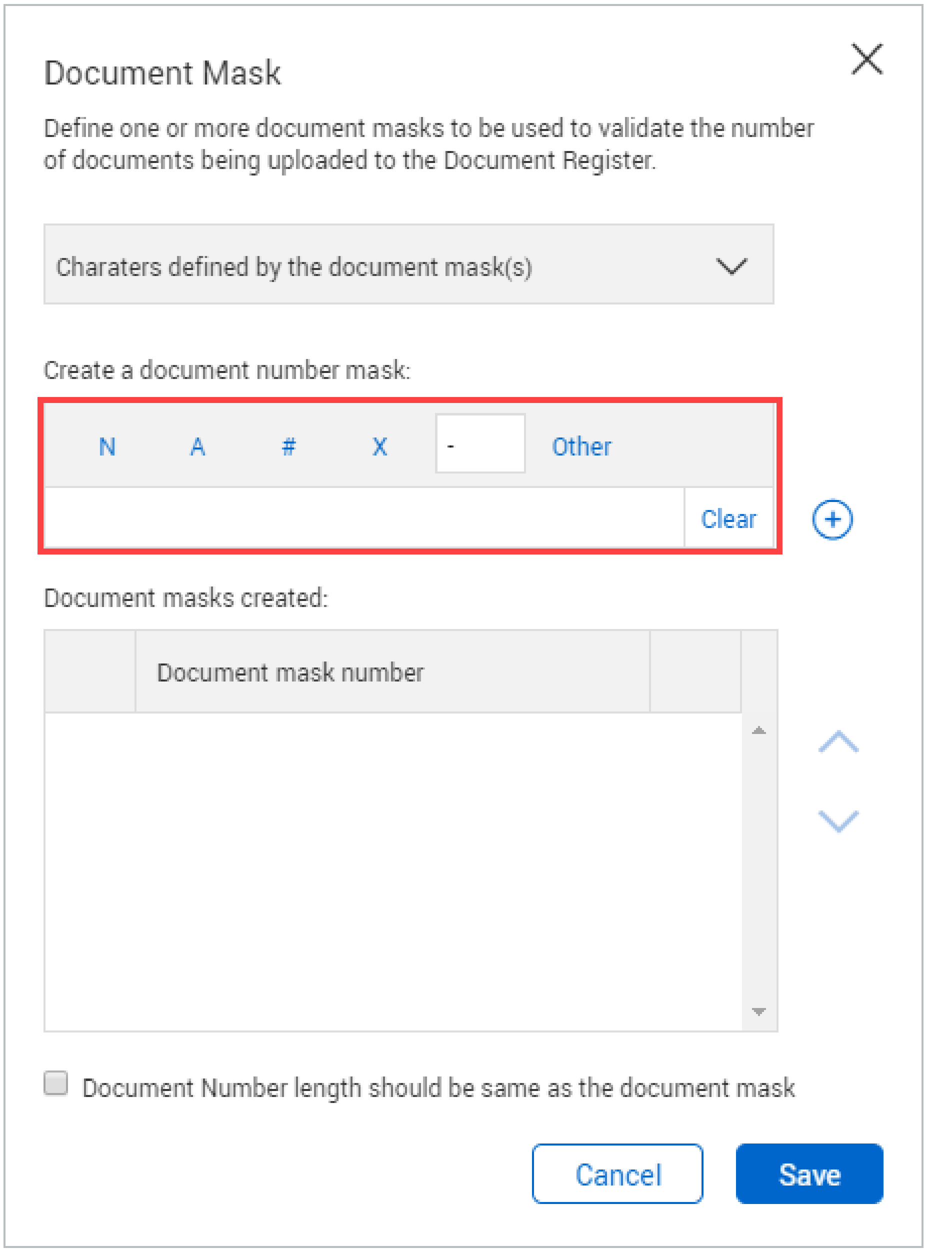
If a fixed document numbering format is to be used on a project, it is possible to define this format within InEight Document to ensure the format is adhered to for all documents uploaded to the project. Multiple fixed formats masks are also supported.

To define document number masks:

1. Select the document in the Register.
2. Click **Actions**.
3. In the **Admin** menu, select **Document Mask**.



4. Click the document mask buttons to create the document mask number. The document mask can consist of any of the following:
   - **N** = Alpha or number characters (0-9, A-Z).
   - **A** = Alpha characters only (A-Z).
   - **#** = Numeric characters only (0-9).
   - **X** = Any alpha or numeric characters.
   - **-** = Use the hyphen as a separator when required.



5. Click the **plus icon** to add the document mask number.
6. Click **Save**.

NOTE

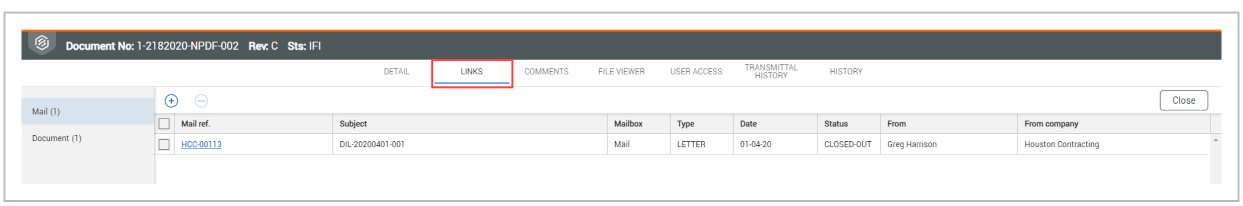
- To control the length of document numbers, select the **Document Number length should be the same as the document mask** check box.
- Use the **Other** button to define fixed characters as part of the document number. For example, to have the project number as the first 4 characters of all documents.
- A series of alternative masks can be used on a project. Documents uploaded must conform to one of the masks in use.
- Use the arrow buttons on the right of the screen to move a Document mask up or down. This determines the order of preference of the document masks.
- Click the **minus icon** to remove a mask from the system.
- When users are entering new documents into to the system, they will see the document mask icon in the document entry screen. They can use this icon to see the document mask(s) in use on the project.

3.9 LINKING DOCUMENTS

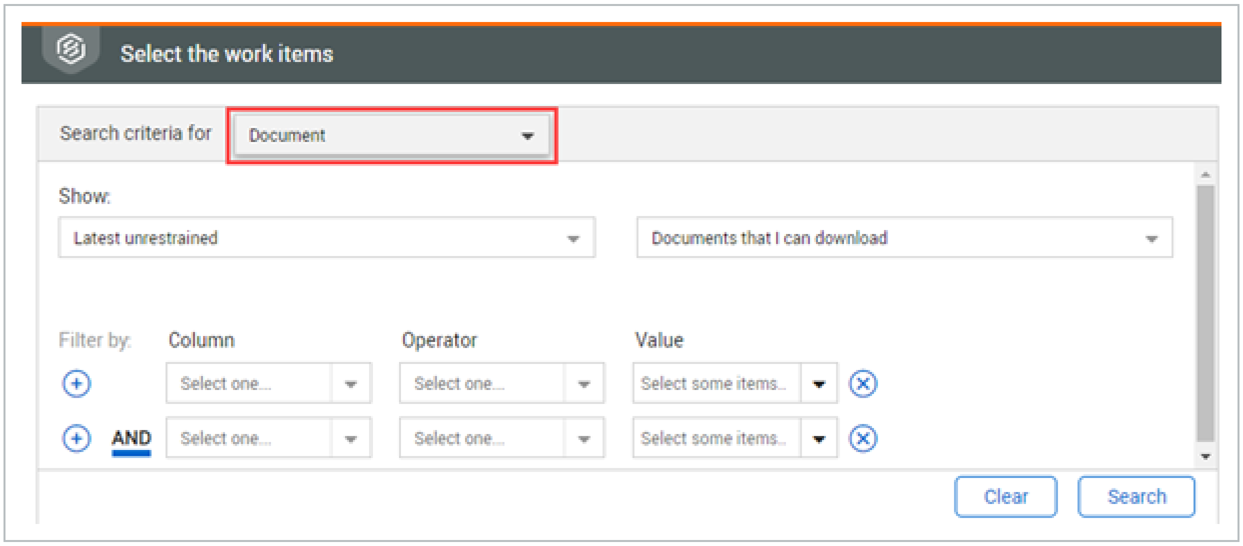
Create links between documents to keep them together.

3.9.1 TO LINK A DOCUMENT TO ANOTHER:

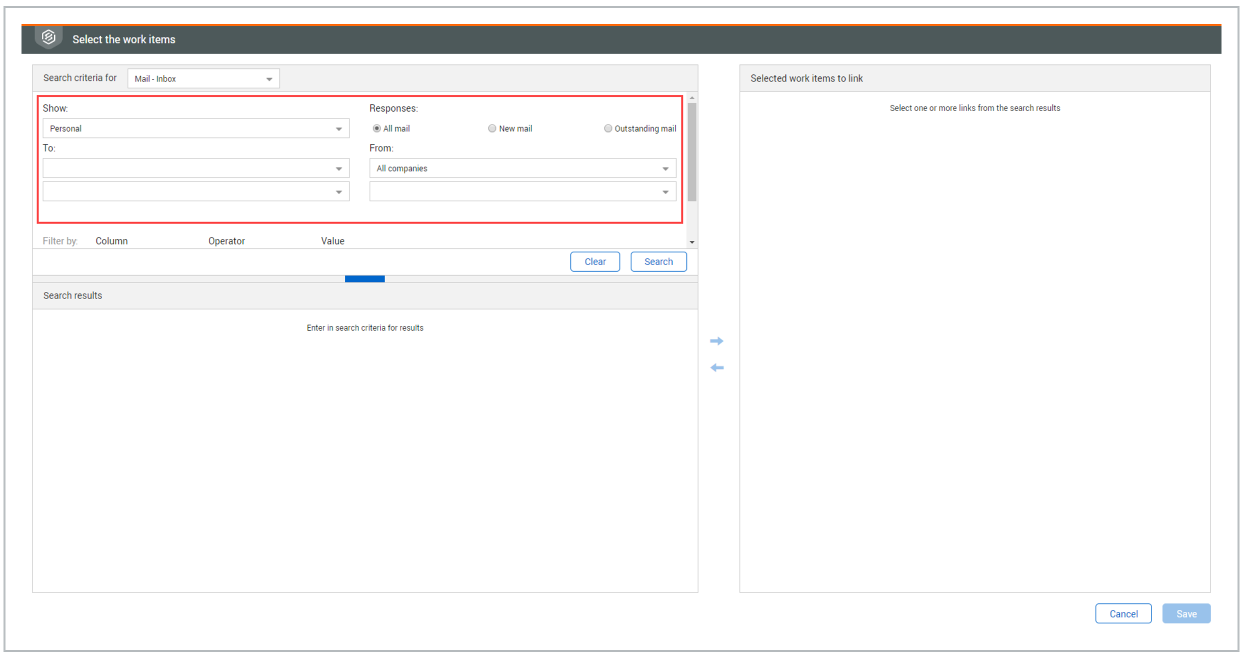
1. Open the document.
2. Click the **Links** tab.



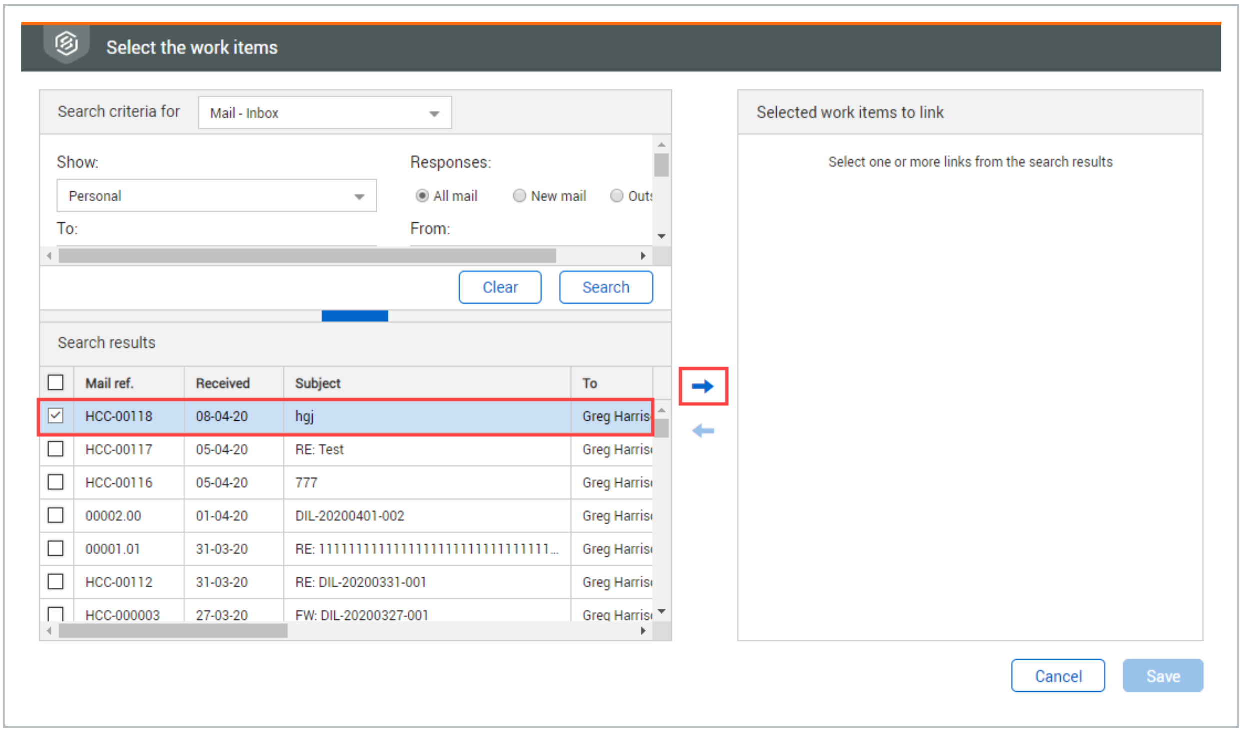
3. Click the **plus icon** to open a new window.
4. Select the Module that you would like to link the item from.



5. Enter in the search criteria and click **Search**.

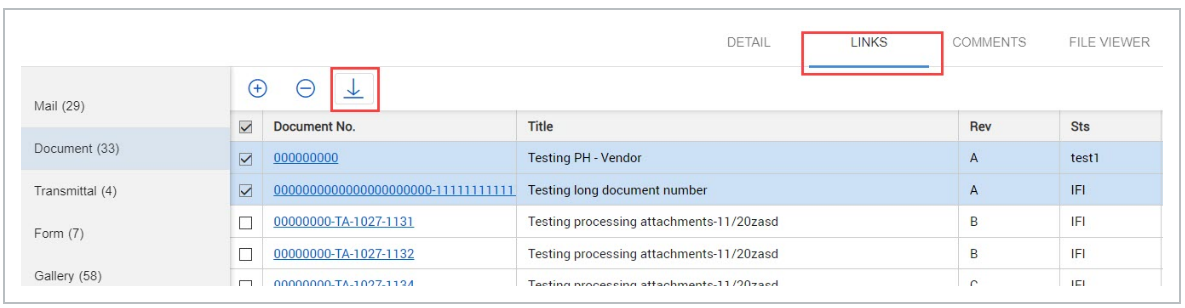


6. Select the document(s) and click the **arrow icon**.



7. Click **Save**.

To download documents from the Links page, select one or more documents, and then click the **Download** icon.



CHAPTER 3 – VIEWING ADDITIONAL DOCUMENT FUNCTIONS

You can view additional information for each document by opening the document and using the document's tabs.

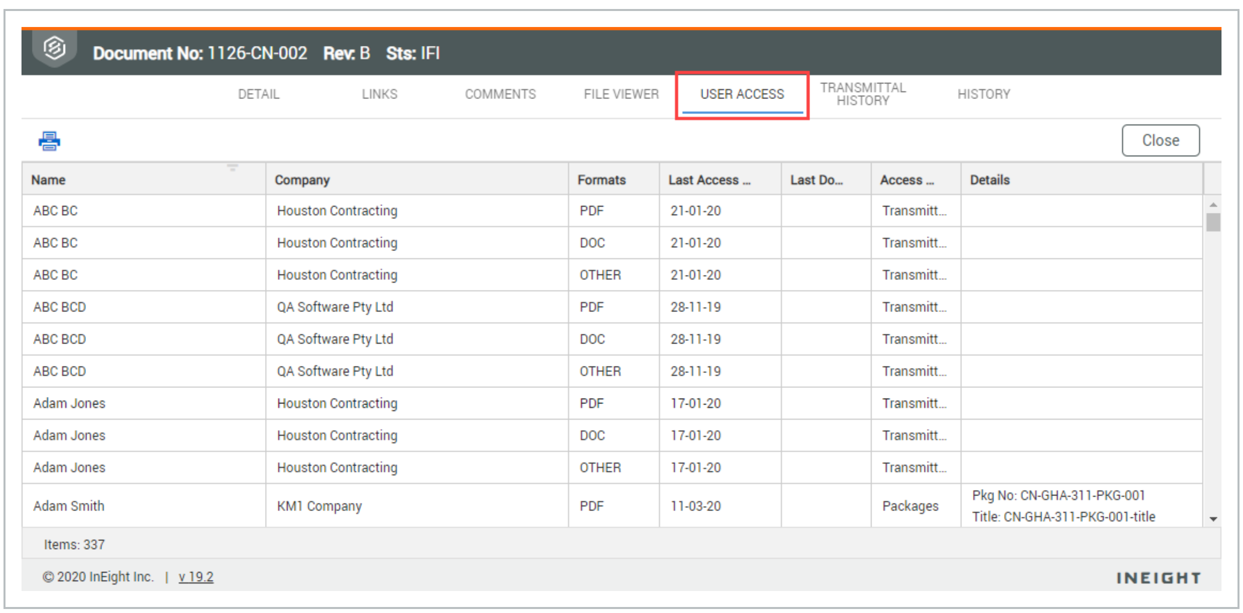
See the links below for information on additional document functions.

3.0.1 VIEWING USER ACCESS

View user access to a document from within the document.

3.0.1.1 TO VIEW USER ACCESS:

1. Open the document.
2. Click the **User access** tab.



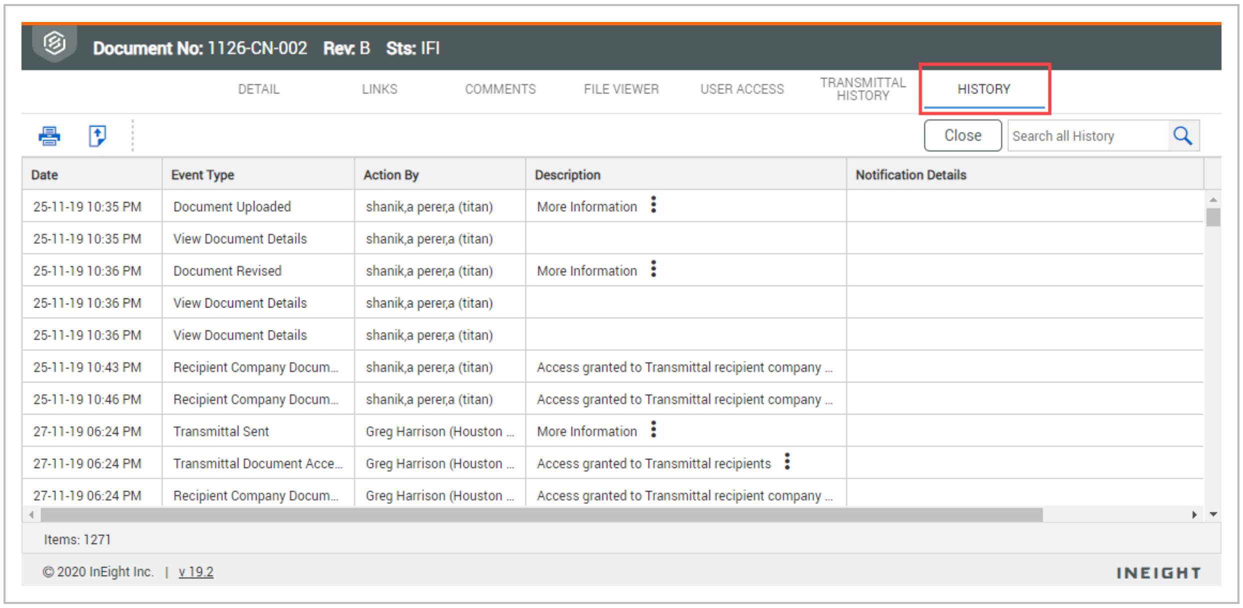
NOTE	
	• The format columns indicate what file formats each user has access to. • The access from column indicates how that user was given access.

3.0.2 VIEWING DOCUMENT HISTORY

View document history from within the document.

3.0.2.2 TO VIEW DOCUMENT HISTORY:

1. Open the document.
2. Click the **History** tab.



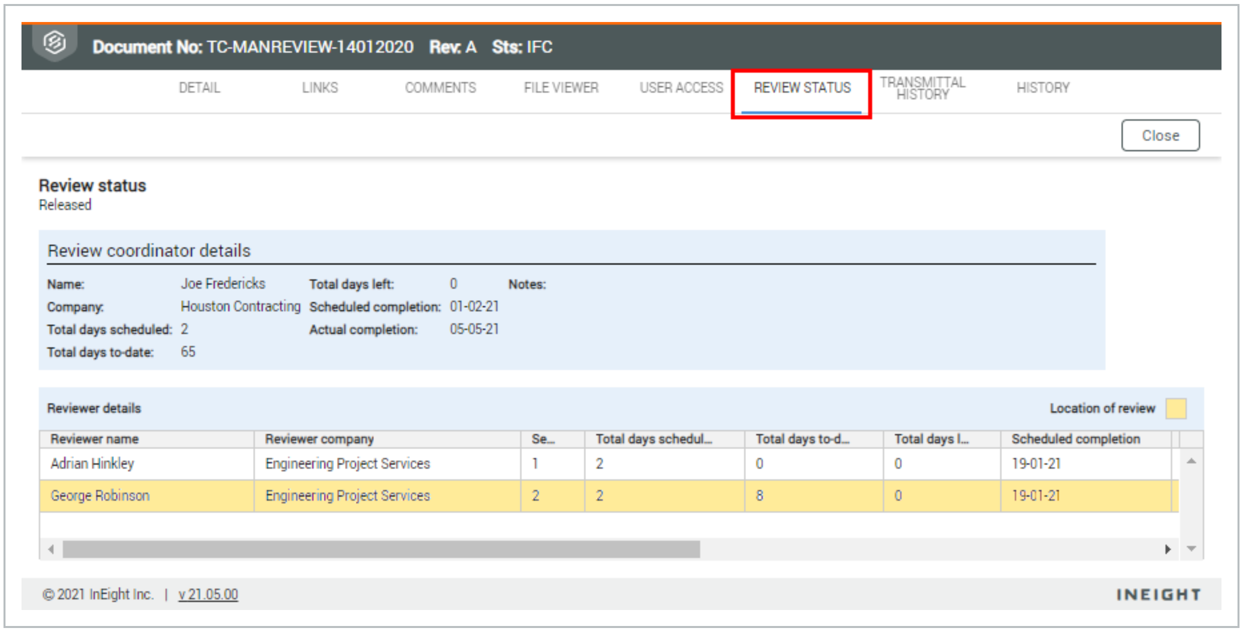
NOTE	
	• Use the search box to filter document history. • Print or export the document history by clicking the **print** or **export icons** in the top left corner of the screen.

3.0.3 VIEWING DOCUMENT REVIEW STATUS

View document review status from within the document.

3.0.3.3 TO VIEW DOCUMENT REVIEW STATUS:

1. Open the document.
2. Click the **Review Status** tab.



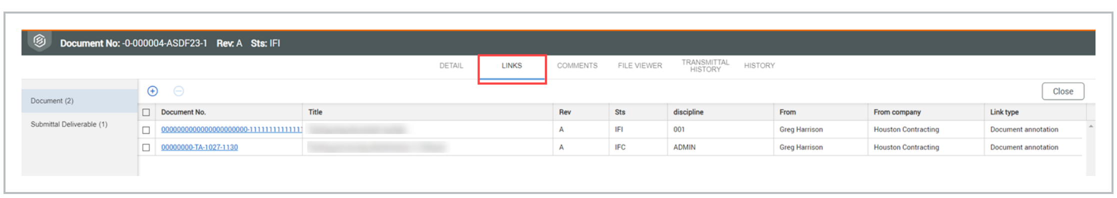
NOTE

- Only documents that are awaiting review or release will have a review history tab. This shows who the document is currently sitting with in the workflow.
- You can only view the history tab if you have the appropriate access level.

3.0.4 VIEWING LINKS

View a summary of links in a document.

1. Open the document.
2. Click the **Links** tab. The Links page opens to the Document tab



Use the Documents tab to see linked items. Click the link to go directly to the linked item. Values in the Link type field indicate whether a link was added manually or from the file viewer annotation feature.

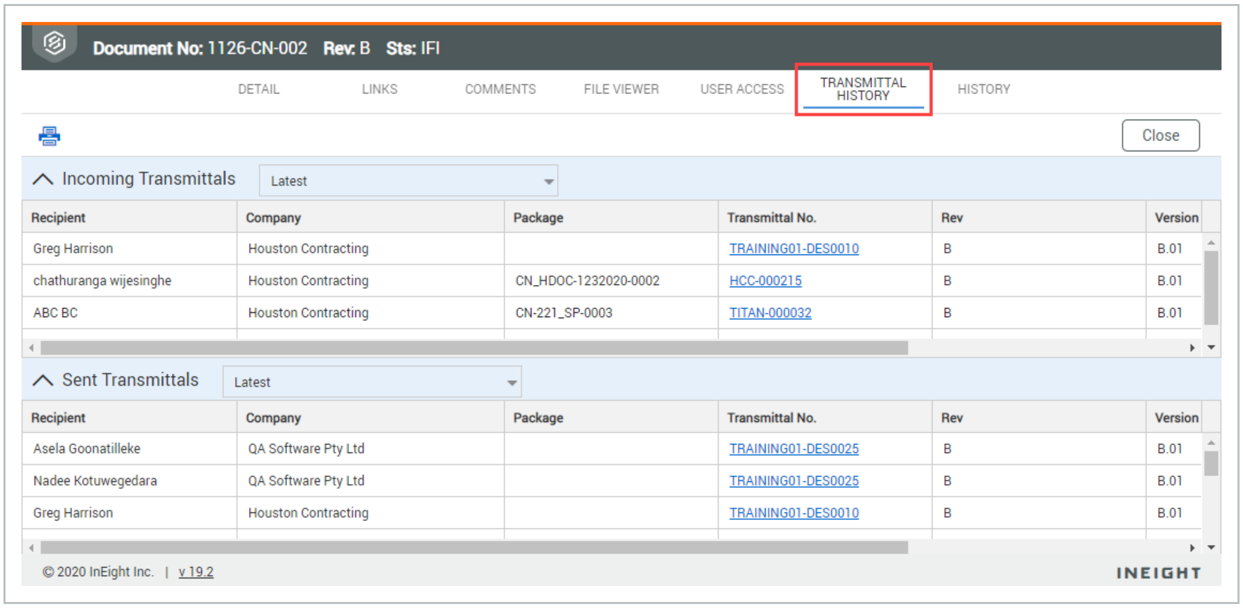
Use the Submittal Deliverable tab to see the submittal numbers and deliverables.that the document is linked to. You can click on the submittal number to go directly to the submittal or the deliverable number to directly to the deliverable.

3.0.5 VIEWING TRANSMITTAL HISTORY

View transmittal history from within the document.

3.0.5.4 TO VIEW TRANSMITTAL HISTORY:

1. Open the document.
2. Click the **Transmittal History** tab.



NOTE	Click on the hyperlink to view the transmittal.

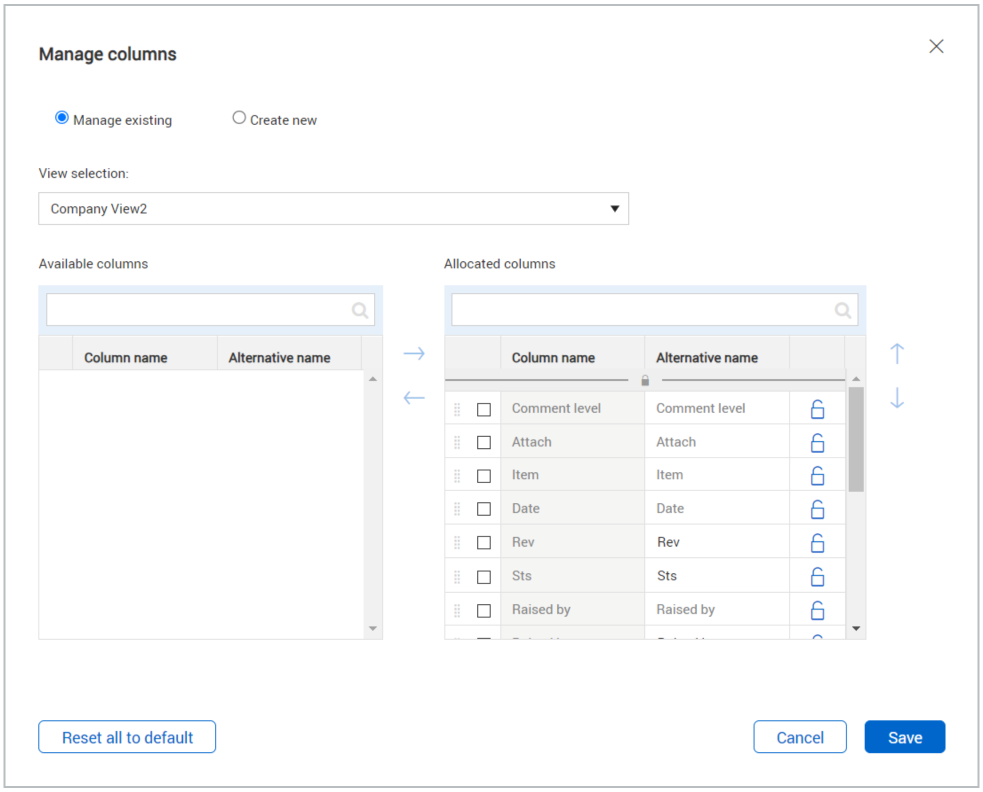
3.1 VIEW COMMENTS

The Comments tab lets you view all comments for a document.

You can filter the register at the column level to help you find the comments you need.

3.1.1 MANAGE COLUMNS

You can specify the columns that show on the Comments page and their order and then save this configuration as a view to help you quickly see the comment information that is most helpful to you. To manage the Comments columns, expand the **Actions** menu, and then select Views > **Manage columns**. The Manage columns dialog box opens.

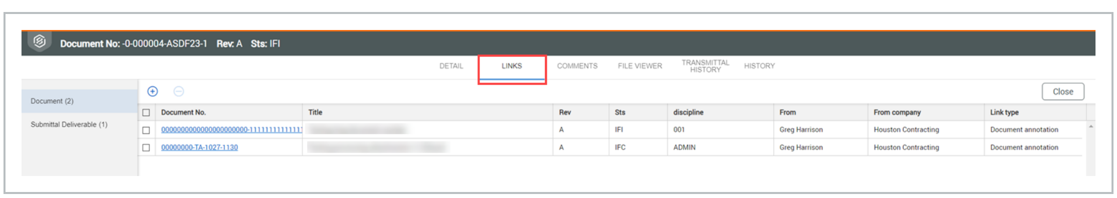


You can manage the existing view or create a new one. After you select columns and arrange their order, click **Save**.

3.2 VIEWING LINKS

View a summary of links in a document.

1. Open the document.
2. Click the **Links** tab. The Links page opens to the Document tab



Use the Documents tab to see linked items. Click the link to go directly to the linked item. Values in the Link type field indicate whether a link was added manually or from the file viewer annotation feature.

Use the Submittal Deliverable tab to see the submittal numbers and deliverables.that the document is linked to. You can click on the submittal number to go directly to the submittal or the deliverable number to directly to the deliverable.

3.3 ESIGNATURE SUPPORT

When a company is integrated with an eSignature solution, such as DocuSign or Adobe sign, you can send PDF or Microsoft Word files for signature directly from the Documents register. After the files are signed by all parties, they are returned to the Documents register.

The Document eSignature feature also lets you track the status of files sent for signature.

3.4 ACTIVATE ESIGNATURE INTEGRATION

VIDEO | eSignature Integration

Before you can send a document for eSignature with DocuSign or Adobe Sign, you must activate the eSignature integration for the project. The integration is configured at the company level (Address book > **Companies**).

To enable the feature, you must have an eSignature solution available with a service account to ensure that users are able to access the required licenses. You can integrate with only one eSignature solution in a project. When you select an eSignature solution, the others become disabled.

3.4.1 ESIGNATURE OPTIONS

When you activate the eSignature integration, you can specify options for uploading the signed PDF, how the history file is uploaded, and the contacts and companies that have access to eSignature functions.

3.4.1.1 SIGNED PDF UPLOAD OPTIONS

When the signed PDF is returned, it can either replace the existing view file, or it can be uploaded as a new version of the document. The How will the signed PDF be uploaded to the Document register section of the External integrations tab has the following options:

Option	Description
Replace existing view file	The signed PDF automatically replaces the original file in the register. No uploading is required.
Uploaded as a new version of the document	The signed PDF is uploaded as a new version of the document. Versioning must be required in the project to select this option. You must also select a user name to be used for the new versions of the document when they are uploaded. The user does not manually upload the file; their name is used to associate the file to a user name. This user must be able to upload documents per the document being sent for signature.

3.4.1.2 HISTORY FILE OPTIONS

You have the option to track the history of the documents. You can choose no history, a linked history document, or a merged document. the How will the history file be uploaded to the Document register section has the following options:

Option	Description
No history file	No history is recorded or uploaded to the Documents register.
As a new document and linked to the original document	A separate document for the history is uploaded and linked to the signed document. You must also specify a user to upload the history file. The user does not manually upload the file; their name is used to associate the file to a user name. This user must be able to upload documents per the document being sent for signature. You must also define default attributes to the new document. Click the **Click to define the default metadata for documents containing history file link**. The Default attributes dialog box opens, where you enter the revision, status, discipline type, and other information.
Merge with the signed and completed PDF	The history file is merged with the signed PDF in a single file.

3.4.1.3 CONTACT ACCESS

You can provide access to eSignature functions to all users in your company or only selected users in your company. The Provide access to section has the following options:

Option	Description
All users in my company	Provides access to all users in the company.
Selected users in my company	You can select the users that have access from a list of contacts in the Select contact to have access to eSignature list and move them to the Contacts given access to eSignature column.
Allow other companies to use eSignature	Select this check box to allow other companies to use eSignature.
Display	Lets you select whether users, departments, or entire companies can use eSignature. You can then select the users, departments, or companies to have access.

ACTIVATE ESIGNATURE INTEGRATION

Summary: Activate the DocuSign or Adobe Sign integration so that contacts can send files to your eSignature solution for a signature.

Considerations: The company must have an active account with DocuSign or Adobe Sign, and you must complete the applicable configuration in that solution. You can integrate with only one eSignature solution in a project. The account must have access to envelope creation in the eSignature solution.

You must be the administrator or a relevant user of the company to set up the integration, so the integration can rely on the company's eSignature subscription.

If you plan to upload the signed PDF as a new version of the document, versioning must be enabled for the project.

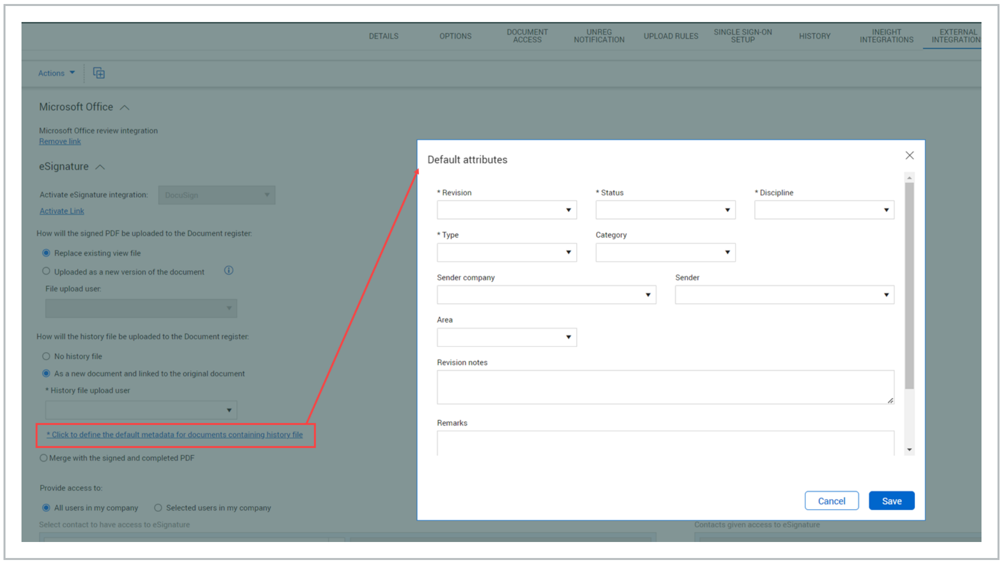
Quick steps:

1. Go to the External integrations page for the company (Address book > Companies > [select company] > **External integrations**).

2. Scroll to the eSignature section, and then click **Activate link**.

The DocuSign sign-in dialog box opens.

3. Enter your DocuSign credentials, and then follow the instructions in the DocuSign dialog. DocuSign shows a success message when the DocuSign set up is complete. Refer to the DocuSign documentation for information about signing in and completing the integration.
4. Close the DocuSign success message.
5. Choose how the signed PDF is uploaded to the Document register. If you choose to upload as a new version of the document, the File upload user field is enabled, and you must select the user that is associated with the new uploaded version.
6. Choose how the history file is uploaded to the Document register if you want one. If you choose **No history file** or **Merge with the signed and completed PDF**, skip the next steps, and then continue with step 10.
7. If you choose to upload the history file and link it to the original document, select the name of the user that is associated with the new uploaded version.
8. Click the **Click to define the default metadata for documents containing history file** link. The Default attributes dialog box opens.



9. Enter the default attributes, and then click **Save**.
10. Indicate whether you are providing access to all users in the company or selected users in the company. If you choose only selected users, select the users from the list.
11. Indicate whether to allow other companies to use eSignature. If you choose to allow other companies to use eSignature, indicate whether it is selected users, selected departments, or the entire company, and then enter your selections.
12. Click **Save**.

What's next: You can send documents to DocuSign or Adobe sign for eSignature.

3.5 SEND A DOCUMENT FOR ESIGNATURE

You can a send a PDF or Microsoft Word document for DocuSign or Adobe Sign for eSignature from the document register or from the document itself.

SEND A DOCUMENT FOR ESIGNATURE

Summary: Send one or more documents to DocuSign or Adobe sign when you want to get one or more electronic signatures on a file. eSignature functions are not associated to document workflow. When you select multiple documents, signees can sign each document, which saves you the expense of multiple envelopes.

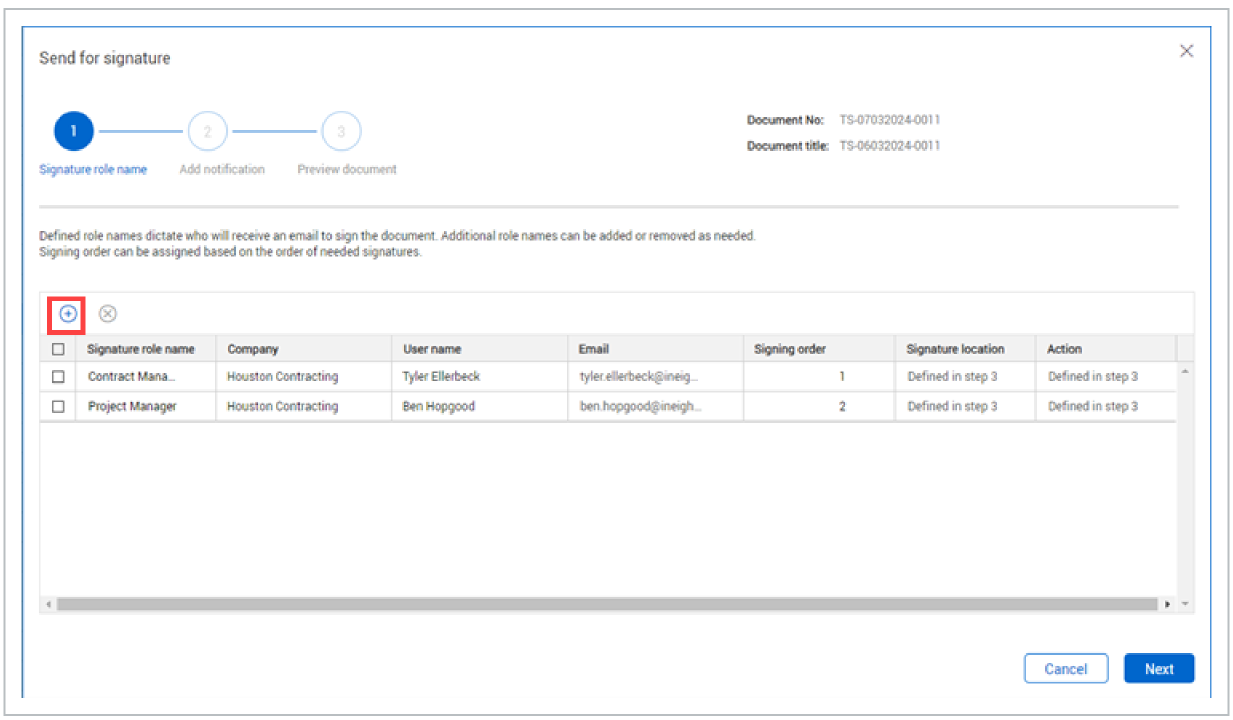
Considerations: Integration with the eSignature solution must already be set up for your company. If signature roles have been defined in the solution, you can embed the roles in documents.

The document must be unrestrained and not previously signed. Only one file type can exist in the document.

1. From the Documents register, select one or more unrestrained PDF or Word documents. Alternatively, you can initiate sending the document for eSignature from the Details page of a document and begin with step 2.
2. Expand the **Options** menu, and then select **Send for signature**. A wizard opens to assist you in setting up signees and adding a message to the email notification that the eSignature solution sends.

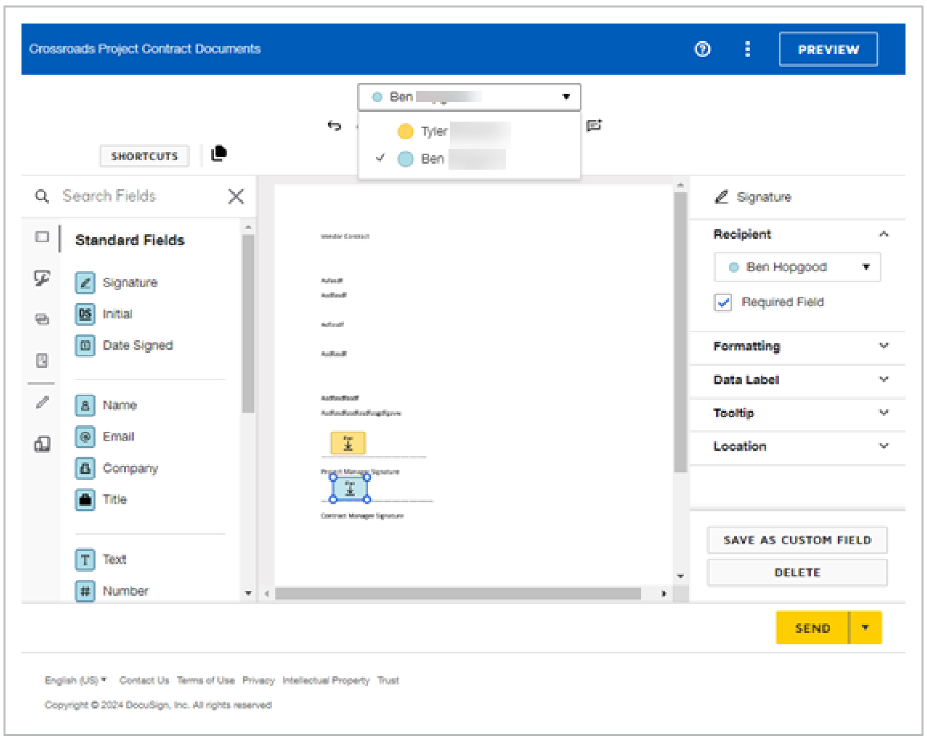
   NOTE If the document contains multiple file formats, you are prompted to select the file type to send for signature.

3. From the Signature role name page of the Send for signature wizard, assign the roles, the associated users, and the signing order. You can assign multiple signees in the same position of the signing order. The signees at the next step receive notification after all the signees at the previous step have signed.



- If roles have been created in the eSignature solution and they are embedded in the file, a list of roles shows. You can then select the applicable company and user name. If you do not want to use a listed role, you can select it and then click the **Delete** icon.
- If no roles have been created, or you want to add to the list of existing roles, click the **Add** icon, and then enter the signature role. You can then select the applicable company and user name.

4. Enter the signing order for the roles, and then click **Next**. Page 2 of the wizard, Add notification, opens.
5. Enter the text for the subject line of the notification text that the eSignature solution sends to the signees. You also can optionally enter message text.
6. Click **Next**. A preview opens in the eSignature solution.
7. Use the eSignature solution's interface to preview the document and define any required roles.



8. Click **Send**.

What's next: The eSignature solution sends notifications to the signees in the designated order. After the documents are signed, Document uploads it to the register according to the eSignature configuration. If you send multiple documents in an envelope, history documents are created as new documents for each document in the envelope.

Document also sends you a notification that includes a link to the document.

Notification of Signature Completion

The signature of the following document/s has been returned from eSignature.

Project: Support TeamBinder New UIUX
Date: 12 September 2022, 05:11:51 PM +10:00

Document No	Rev	Sts	Document Title	File for Signature
CIV-DRG-0001	A	IFR	Civil Drawings	Civil Drawings.pdf
CIV-DRG-0002	A	IFR	Civil Drawings	Civil Drawings.0001.doc
STR-DRG-0003	A	IFR	Structural Drawings	Structural Drawings.pdf

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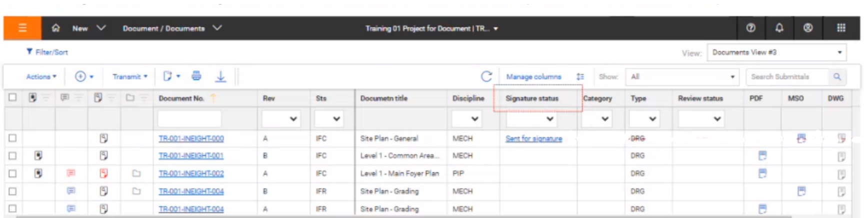
If the signature process has failed, the eSignature solution sends a failure notification.

You can track the signature status from the documents register.

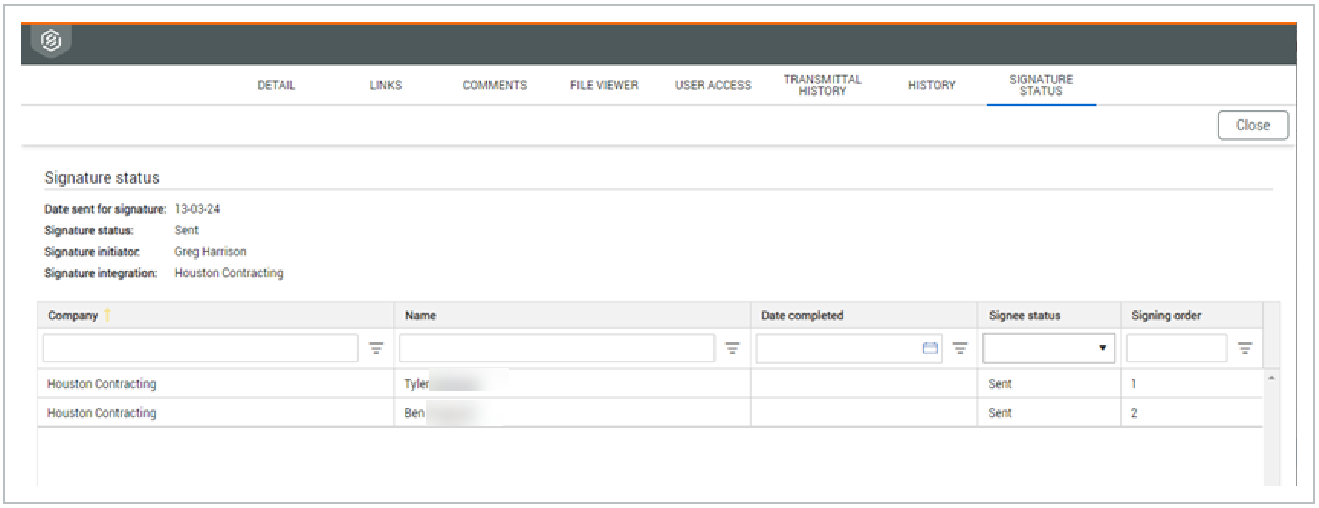
3.6 SIGNATURE STATUS

You can track the signature status from the Documents register or from the document's Signature status tab.

On the Documents register, the Signature status column shows the status of the document. You can click the link to go to the Signature status tab.



The document's Signature status page shows the overall status of the document along with the signees and their individual signing statuses.



Document supports the following statuses:

Status	Description
Draft	Signatures have been partially set up and saved but not sent.
Sent for signature	Signatures are currently in progress.
Completed	Signatures have been completed and signed by all users.

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CHAPTER 4 – APPLYING DOCUMENT ADMINISTRATION SETTINGS

You can view apply different administration settings to documents in the Documents Register.

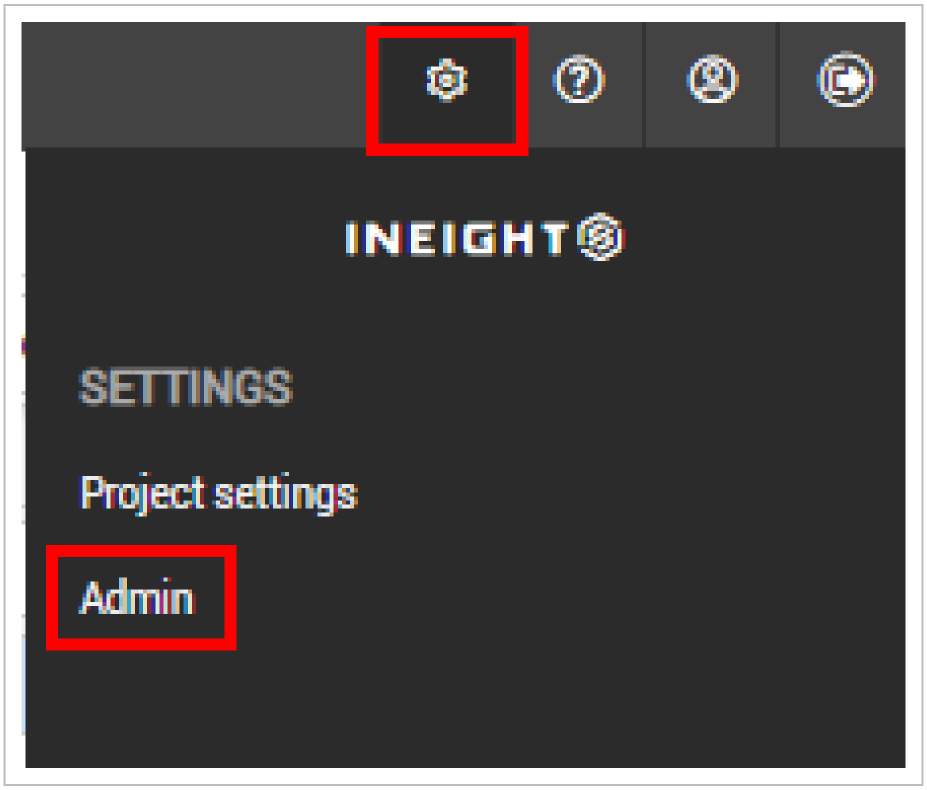
See the links below for information on applying document administration settings.

4.1 DEFINING DOCUMENT UPLOAD RULES

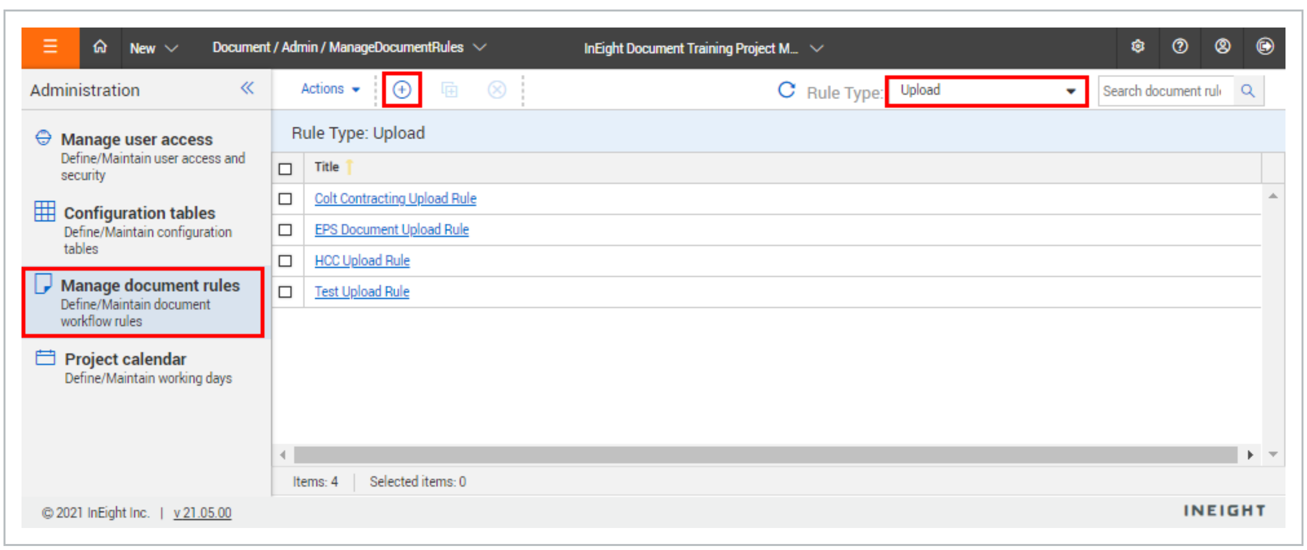
InEight Document controls who can upload documents to the system by a flexible system of document rules. Upload rules are defined in terms of key document attributes and companies are allocated to one or more rule sets. This means they can only upload documents that conform to the rule set they have been assigned to.

4.1.1 TO DEFINE DOCUMENT UPLOAD RULES:

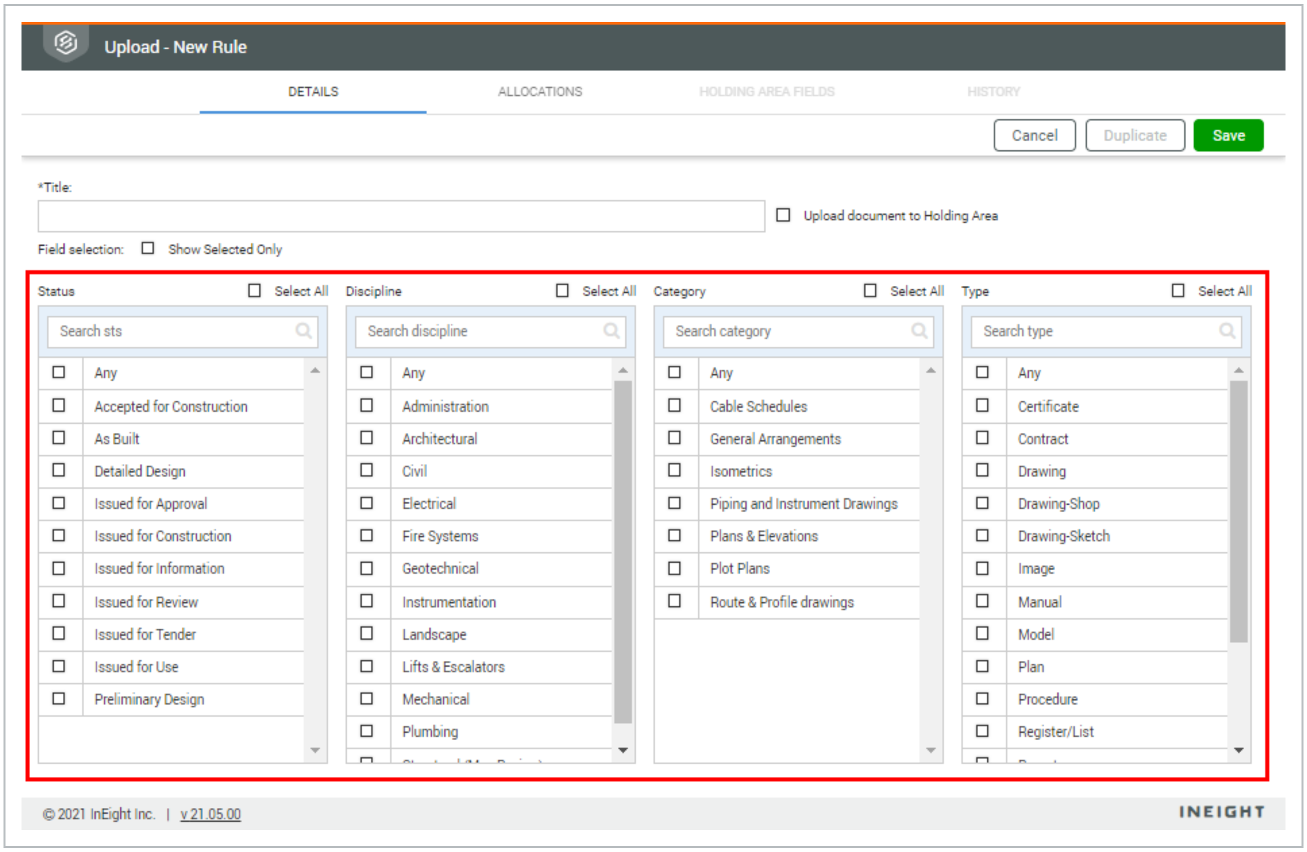
1. Click the **cogwheel icon** and select **Admin**.



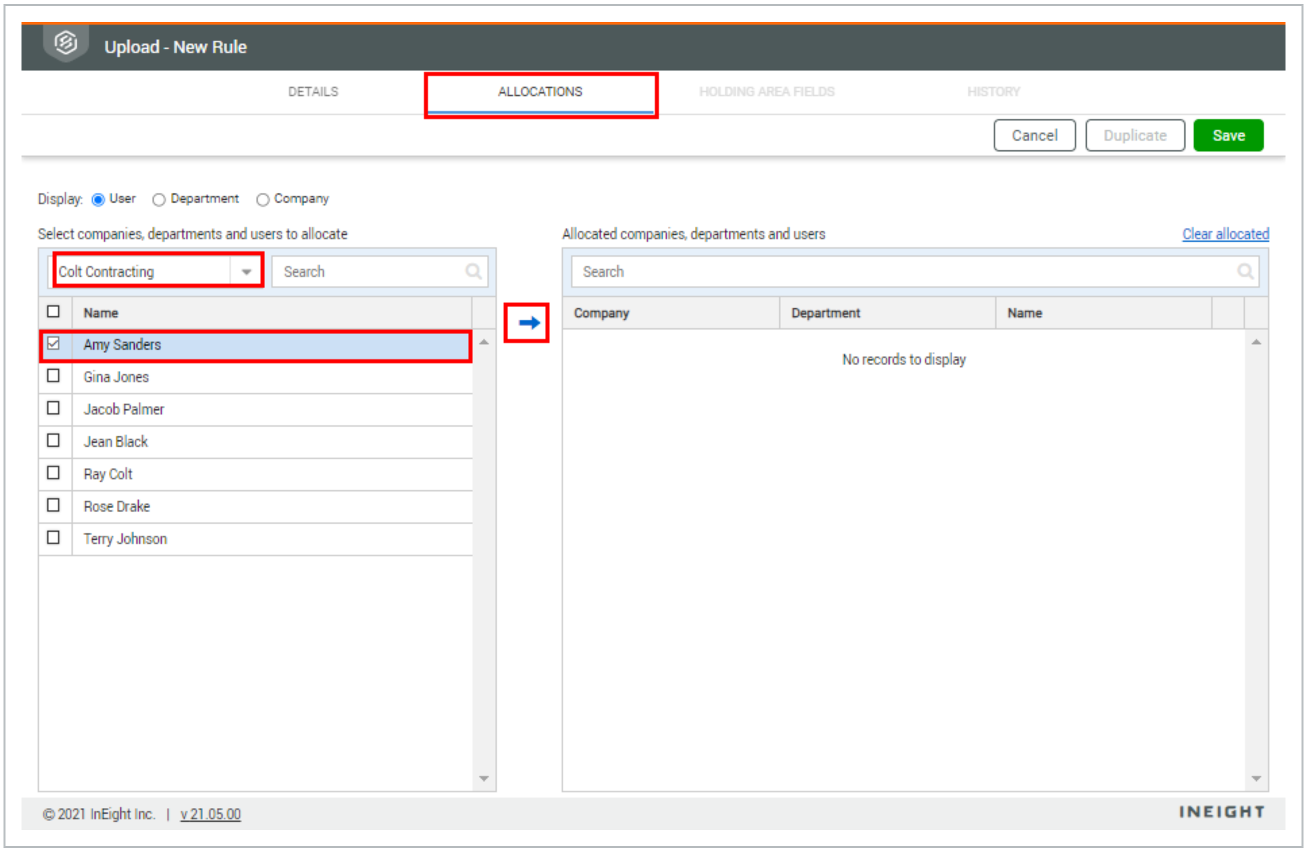
2. Select **Manage document rules.**
3. In the **Rule Type** drop-down menu, select **Upload**.



4. Click the **plus icon**.
5. Enter in a title for the upload rule.
6. Select the **Status**, **Discipline**, **Category** and **Type** for the new upload rule.



7. In the **Allocations** tab, select the company.
8. Select the contact and click the **arrow icon**.



9. Click **Save**.

NOTE

- In addition to belonging to a company assigned to one or more upload rules, users who need to upload documents must be assigned full access to the Document Register.
- While more than one company can be authorized to upload documents belonging to an upload rule set, once a document has been uploaded usually only the company who uploaded it can upload future revisions.

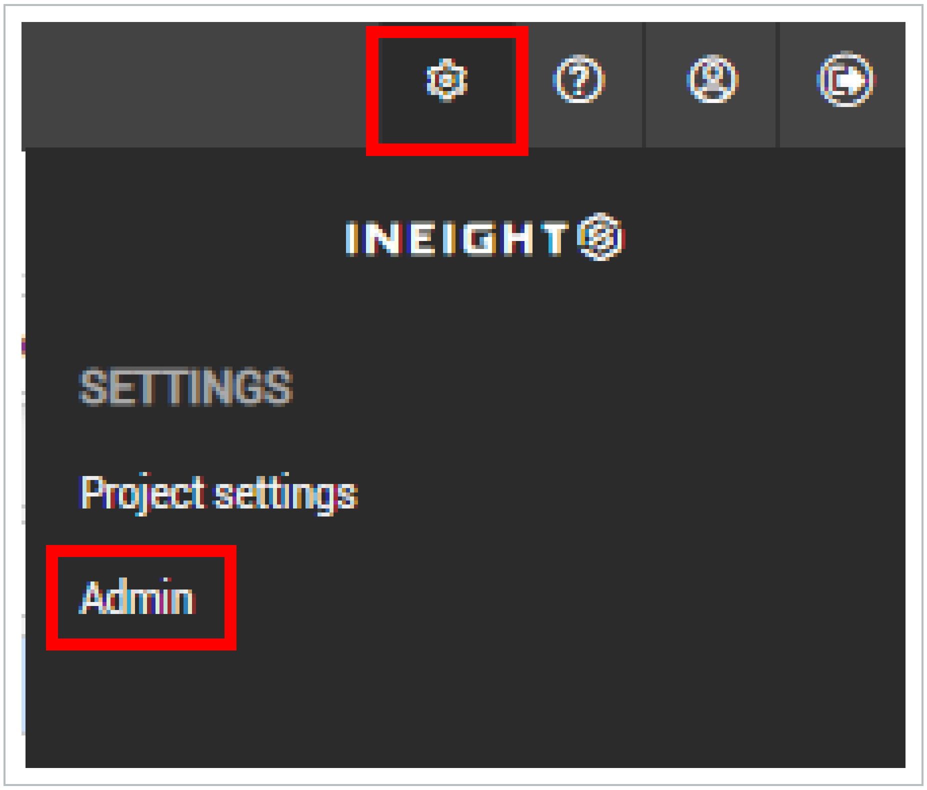
4.2 DEFINING DOCUMENT DISTRIBUTION RULES

InEight Document can automate the distribution of documents uploaded to the system via rule-based distribution rules which control:

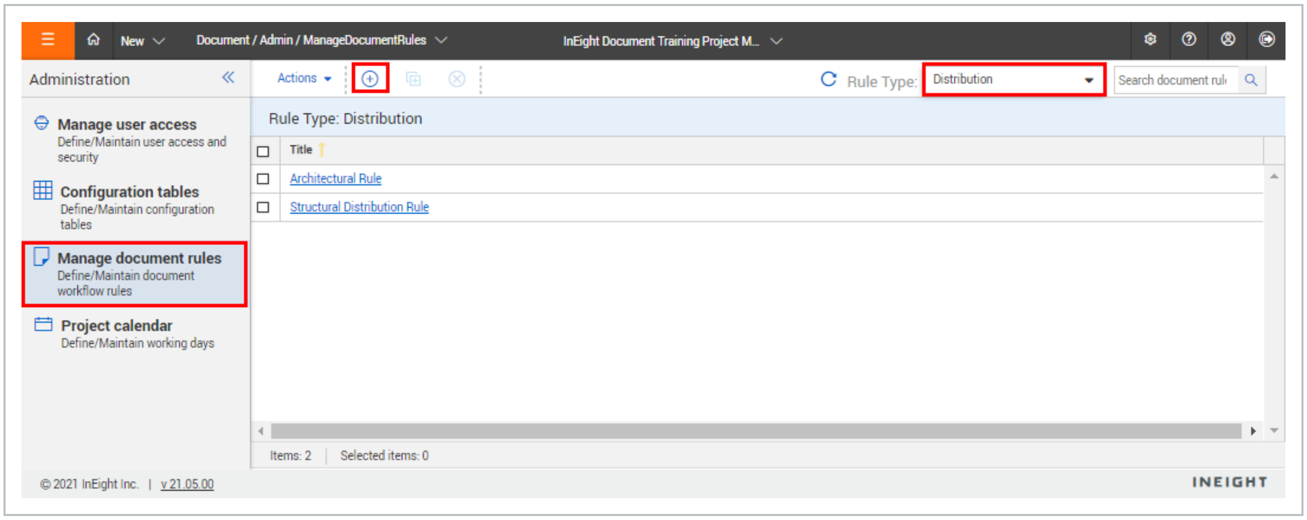
1. The **default distribution** for unrestrained documents.
2. The format(s) of the documents each person on the distribution can download.
3. A user included in a **distribution rule** set will automatically be notified when documents meeting the rule-based criteria of the group are released in InEight Document.
4. Distribution rules are defined on a per attribute basis.

4.2.1 TO DEFINE DOCUMENT DISTRIBUTION RULES:

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

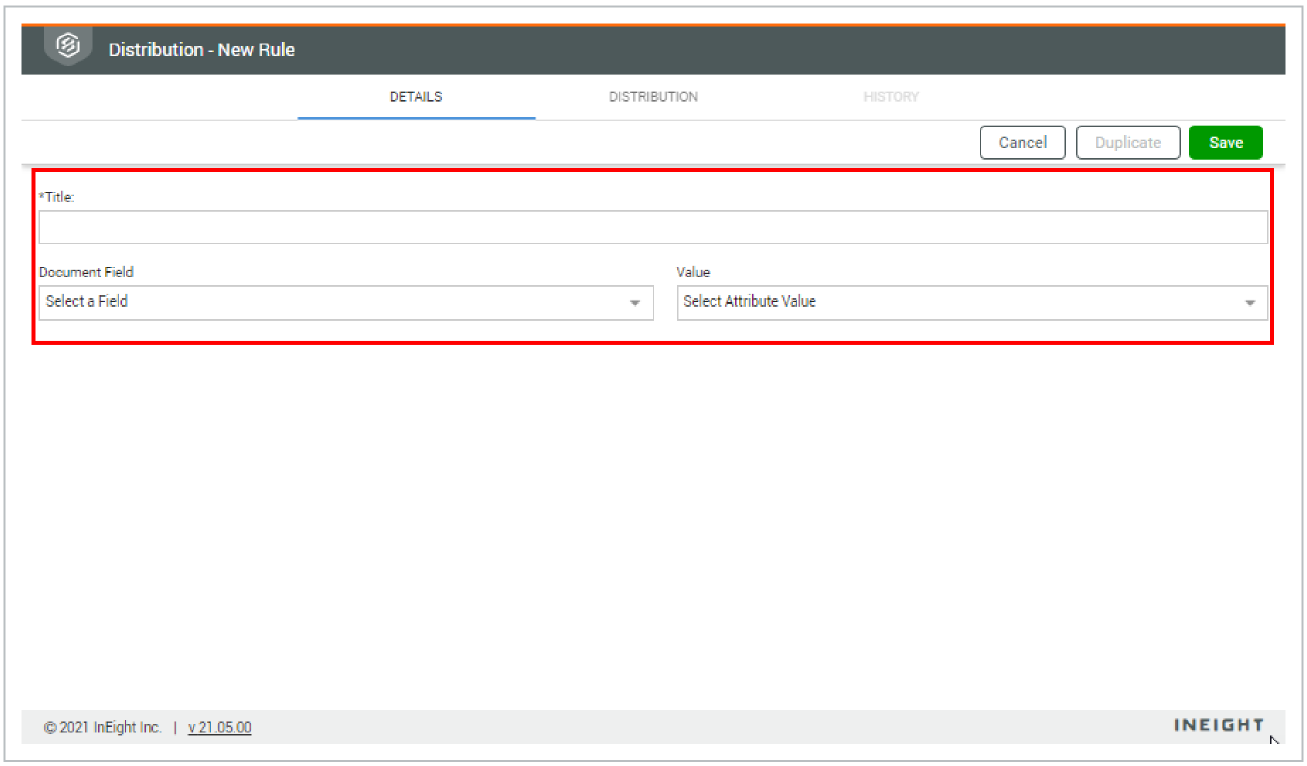


2. Select **Manage document rules.**
3. In the **Rule Type** drop-down menu, select **Distribution**.



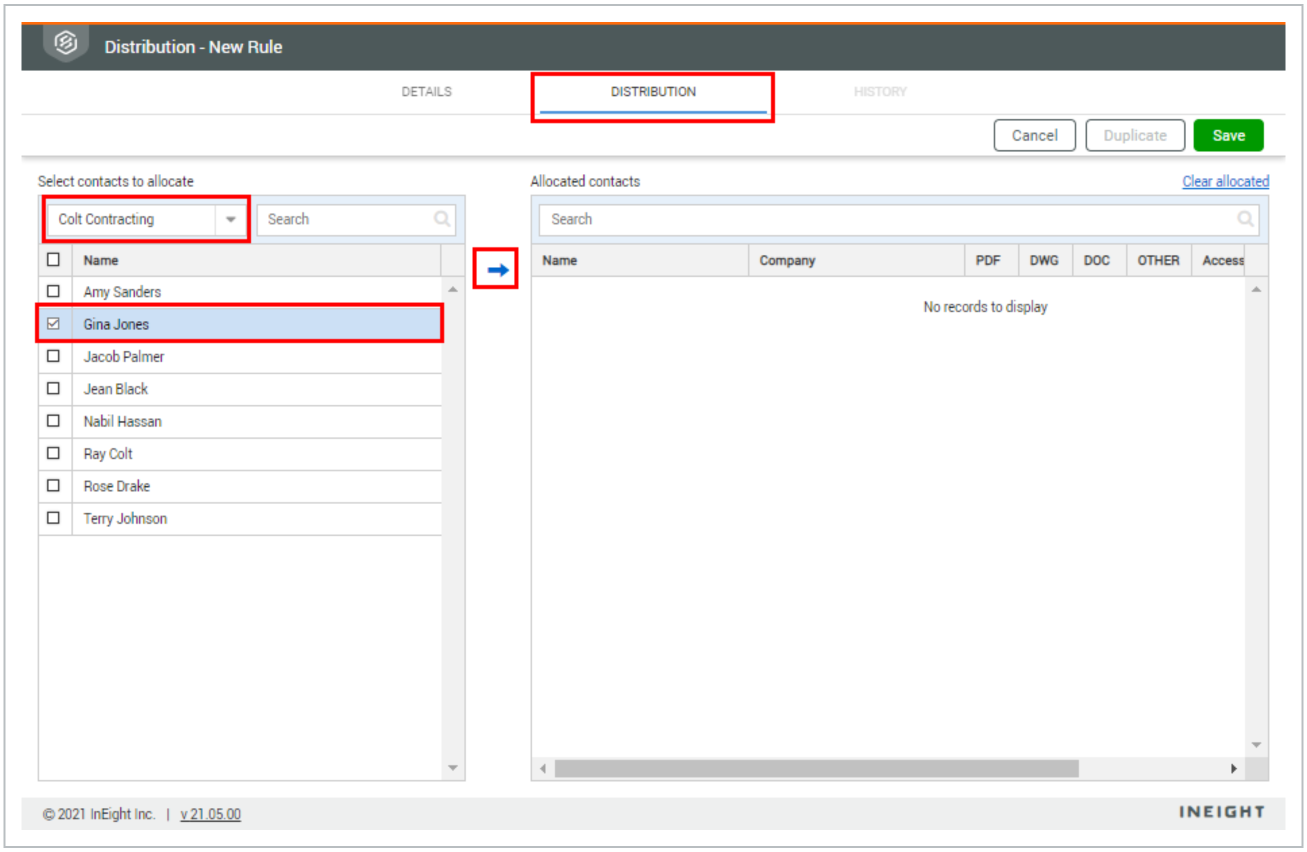
4. Click the **plus icon**.

5. Enter in the title for the distribution and select a value from the drop-down menu.

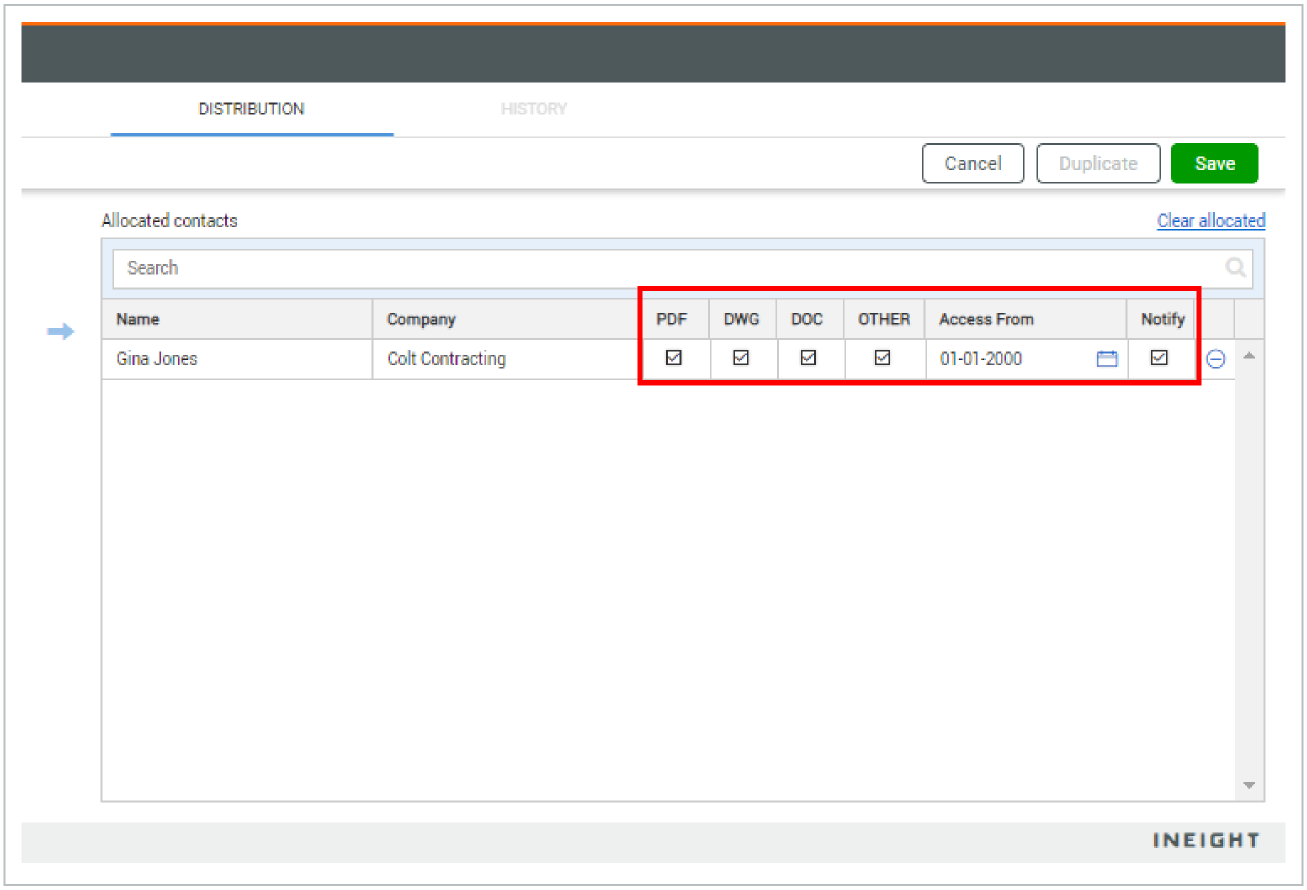


6. In the **Distribution** tab, select the company.

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



8. Select the formats the contact has access to.
9. Select notify to send notifications to the contact for documents.



10. Click **Save**.

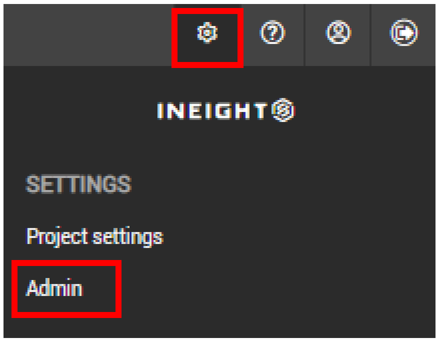
NOTE

- If a person removed notifications from their user preferences and **Notify** is selected, they will still receive a notification.
- The distribution rules a user belongs to can also be reviewed and maintained via the **Distribution Matrix** tab in the contact details screen.
- When you add a person to a distribution rule and there is a conflicting restricted document access rule, a warning message is shown with a link to the rule with the conflict.
- For customers who would prefer that all documents are distributed via transmittals, the option to use distribution rules can be removed from the system completely. Contact InEight for more information.

4.3 ACCESS USER SECURITY SETTINGS

4.3.1 TO ACCESS GROUP SECURITY SETTINGS:

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



2. Select **Manage user access.**
3. Select a security group, and then select **Security** from the **Access Type** drop-down menu.
4. Select **Documents** from the **Module** drop-down menu. The Document security group settings are listed.
5. Select the check box in the Allow column for each feature you want to allow for the security group.

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CHAPTER 5 – DOCUMENT REVIEW AND APPROVAL

See the links below for information on how use the Review and Approval modules.

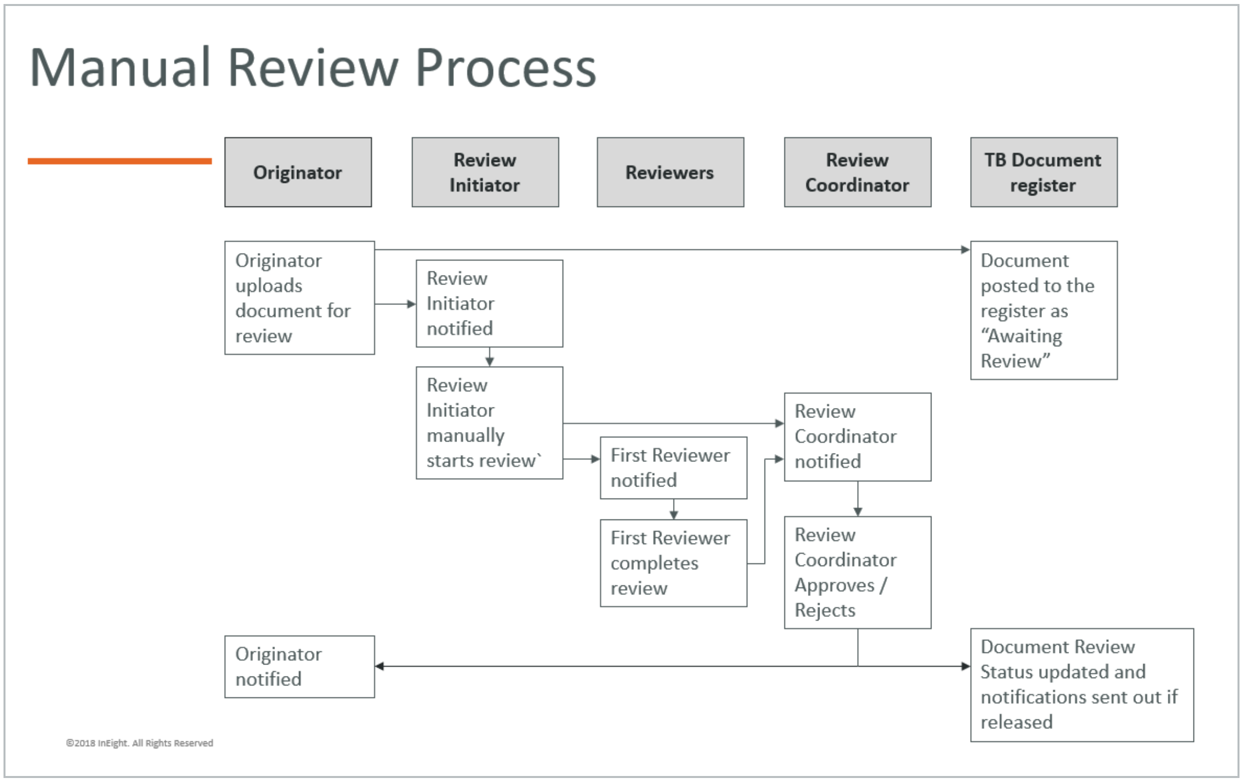
5.1 OVERVIEW

There are 8 steps in the Document Review (manual workflow) process once a restrained document[1] is uploaded to InEight Document:

1. The **Review Initiator** receives a notification that a restrained document has been uploaded.
2. The **Review Initiator** activates the workflow for one or more documents to their default review teams (these can be edited as required).
3. The **Reviewers** are notified in turn or at the same time depending if the review is being performed in series or in parallel (as controlled by the sequence against each reviewer in the review team).
4. The **Reviewers** complete their review using the Document Review screen by redlining, and/or commenting on the documents. If the project setting Enable editing of redlines and comments before release is enabled, the review coordinator can edit comments and markups from other reviewers before release.
5. The **Review Coordinator** receives a notification once **ALL** reviewers have completed their review.
6. The **Review Coordinator** then performs their own review using the Document Release screen, selects which Review comments to include and applies a Review Status which controls whether the document is released or rejected.
7. Notifications on the outcome of the review are sent to the Originator and/or Review team members.
8. If Released, the Document is distributed in InEight Document automatically as normal. If rejected, a notification will be sent to the originator, and they will make any corrections and re-

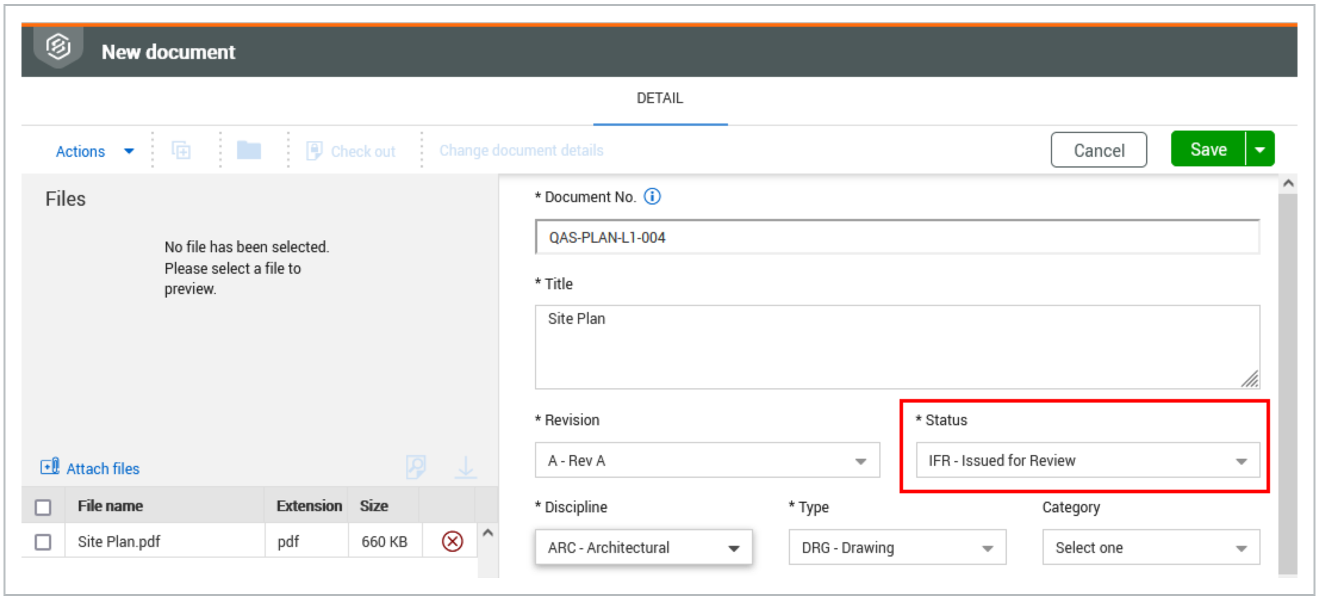
[1] To be passed through a workflow.

submit for review.



5.2 UPLOAD OF DOCUMENTS FOR REVIEW

Documents requiring review are uploaded in the same way as any other document in InEight Document. The status assigned by the uploading company determines if the document is restrained (to be passed through a workflow) or unrestrained (without going through a workflow).



Documents uploaded to InEight Document that are restrained are posted to the document register with a review status of **Awaiting Review/Release.** A restrained document can only be accessed by the review initiator and project administrators. Once the workflow is activated, the document can also be accessed by the review coordinator and review team members.

NOTE

- If Auto Activation of the review process is enabled, the first reviewer in the relevant review team is automatically notified to complete their review. For Parallel based reviews, each reviewer is notified at once.
- If the workflow is Manual (auto Activation was not enabled), the Review Initiator assigned for the rule group is notified that a restrained document or group of documents has been uploaded and the workflow requires activation.
- If a restrained document is uploaded that does not have a review team defined, the Review Initiator will be notified with a CC to the Project Administrator.

5.3 ACTIVATING A DEFAULT WORKFLOW

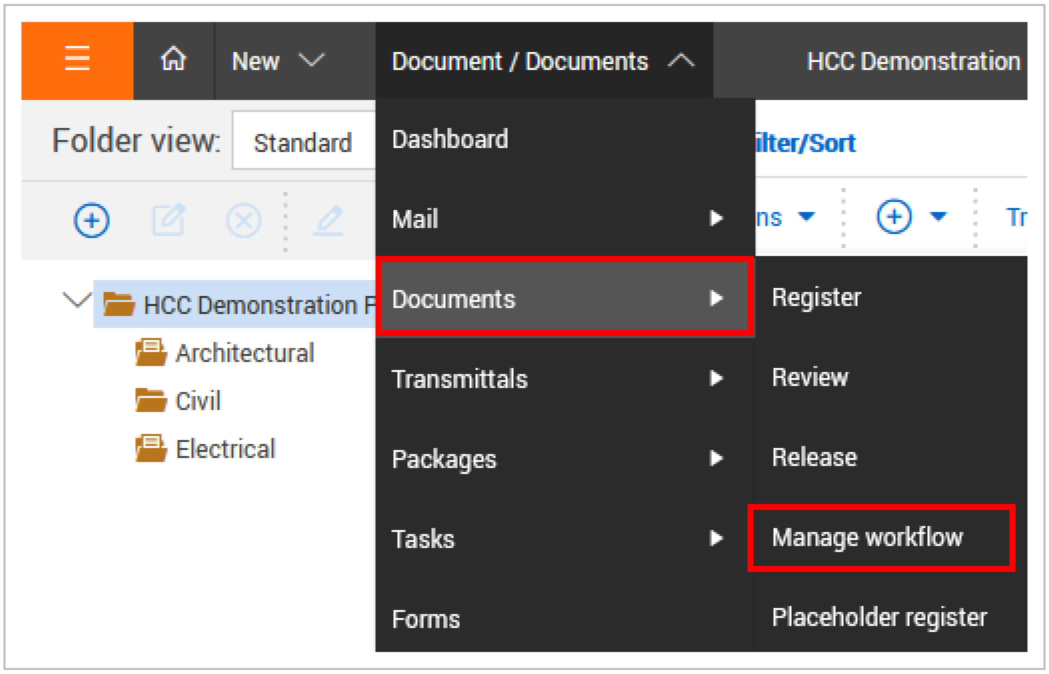
The Review Initiator can activate the manual workflow to the default review team which can be edited as required.

ACTIVATE A DEFAULT REVIEW

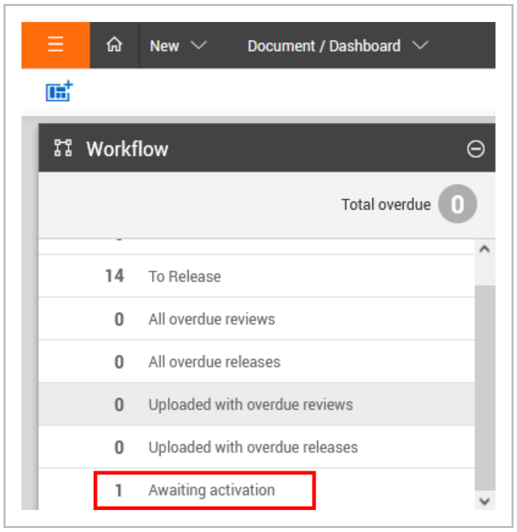
Summary: Activate a default workflow to select a predefined group of reviewers that will review one or more documents.

Considerations: The review initiator can activate the workflow on a per document basis or for a batch of documents.

1. From the Module Menu, hover over Documents, and then select **Manage workflow**.

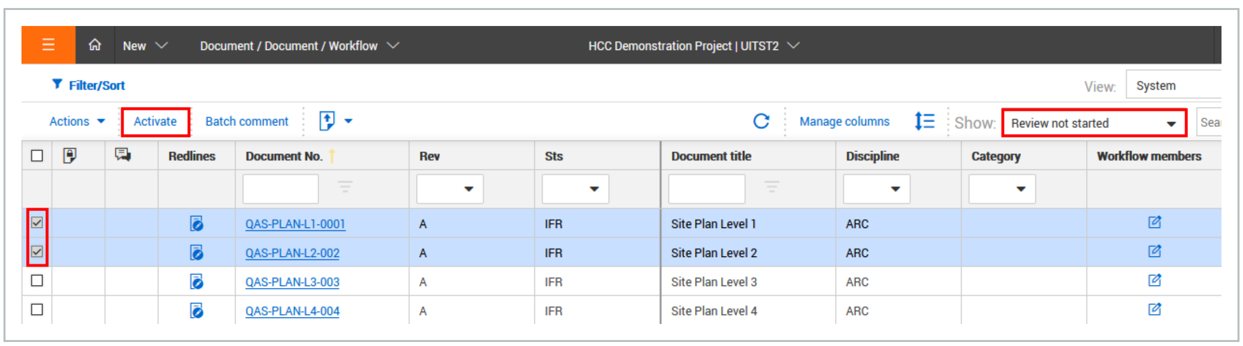


Alternatively, from the Dashboard Workflow tile, select **Awaiting activation**.



The Manage Document Workflow page opens.

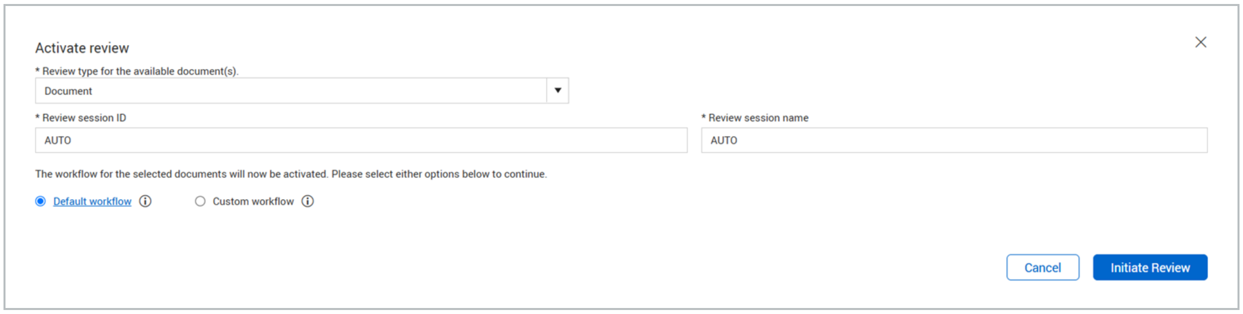
2. Verify that the Manage Document Workflow page view is set to *Review not started*. Select the documents you want to send through the review process.



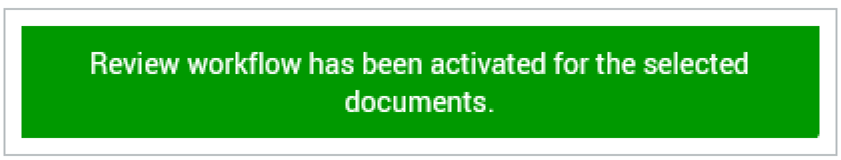
3. Click the **Activate** button. The Activate review dialog box opens.

4. From the Review type for the available documents drop-down list, choose the review type for the documents. If the documents will be reviewed using one of the possible integrations, such as to Bluebeam or Microsoft Office, select the applicable review type. If the documents are to be reviewed in Document, select **Document**.

   The system selects applicable review types based on the file type and the integrations available on a project.



5. If applicable, enter the review session ID and the review session name. The system also applies these values automatically, so the project can use a predefined session ID format. These values help identify the review documents and can be used in filtering or grouping documents.
6. Select the option **Default Workflow** as the workflow type, and then click **OK**.
7. The review process will be activated using the rules based review team each document relates to.



NOTE

- You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending and descending order.
- The first reviewer (for serial reviews) or all reviewers (parallel reviews) will be notified by email to complete their review.
- The default rules based review team can be modified during the activation process by clicking the **Add/Edit** link at the **Manage Document Workflow** page. The changes only apply to the document against which you clicked Add/Edit. After saving, a prompt to activate the workflow for this document shows.
- If a restrained document that has been released is edited by the originator by adding an additional view file, even if the revision or status are not changed, the document is automatically available for workflow activation again. When activated in this scenario (that is, the revision has not changed) the workflow will be considered as Level 2.
- If the option is enabled, the Review Initiators can Release or Reject a document prior to activation of workflow.
- When you activate workflow for documents that have the same review team, Document automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Review or Release register for you to use to filter the register to quickly find all documents in the workflow.

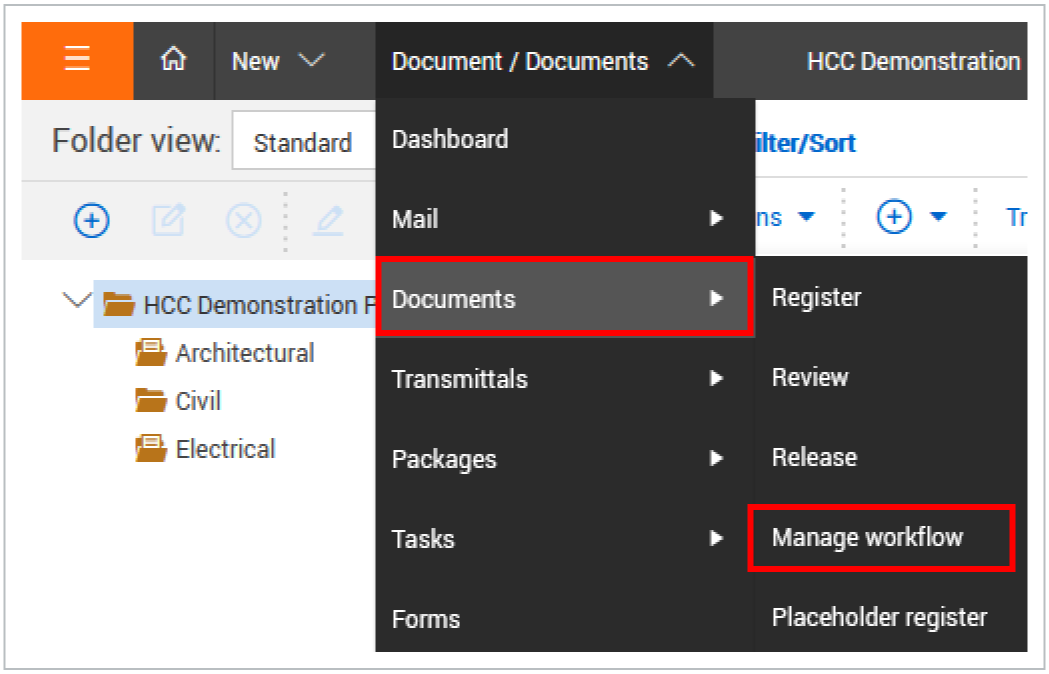
5.4 ACTIVATING A CUSTOM WORKFLOW

The review initiator has a choice of using the default rules based review team or using a custom workflow that can be defined from scratch or based on a predefined free-form review team.

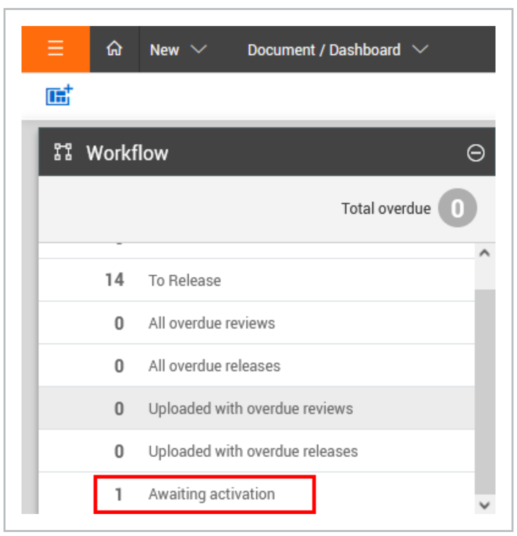
ACTIVATE A CUSTOM WORKFLOW

Summary: Activate a custom workflow to create an ad hoc review team to review one or more documents.

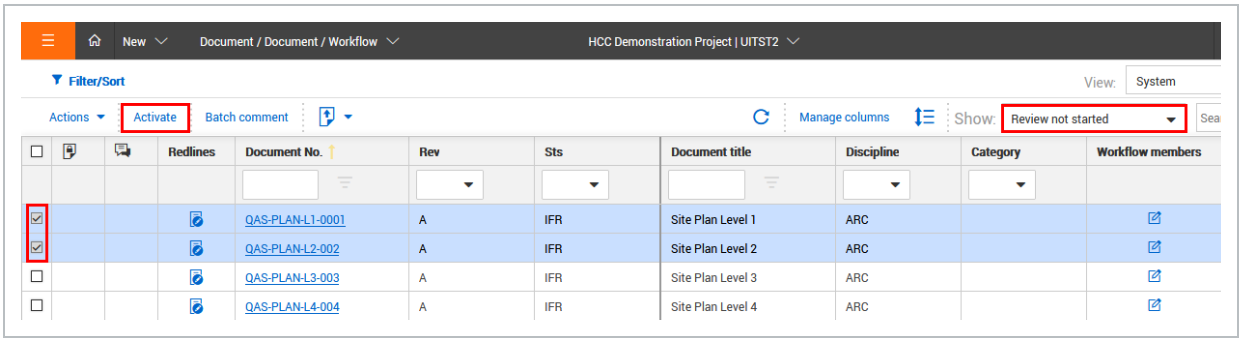
1. From the Module Menu, hover over Documents, and then select **Manage workflow**.



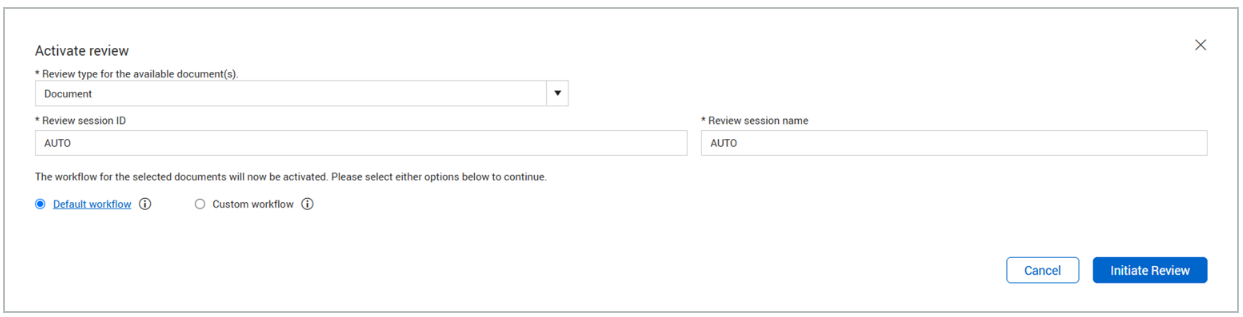
Alternatively, from the Dashboard Workflow tile, select **Awaiting activation**.



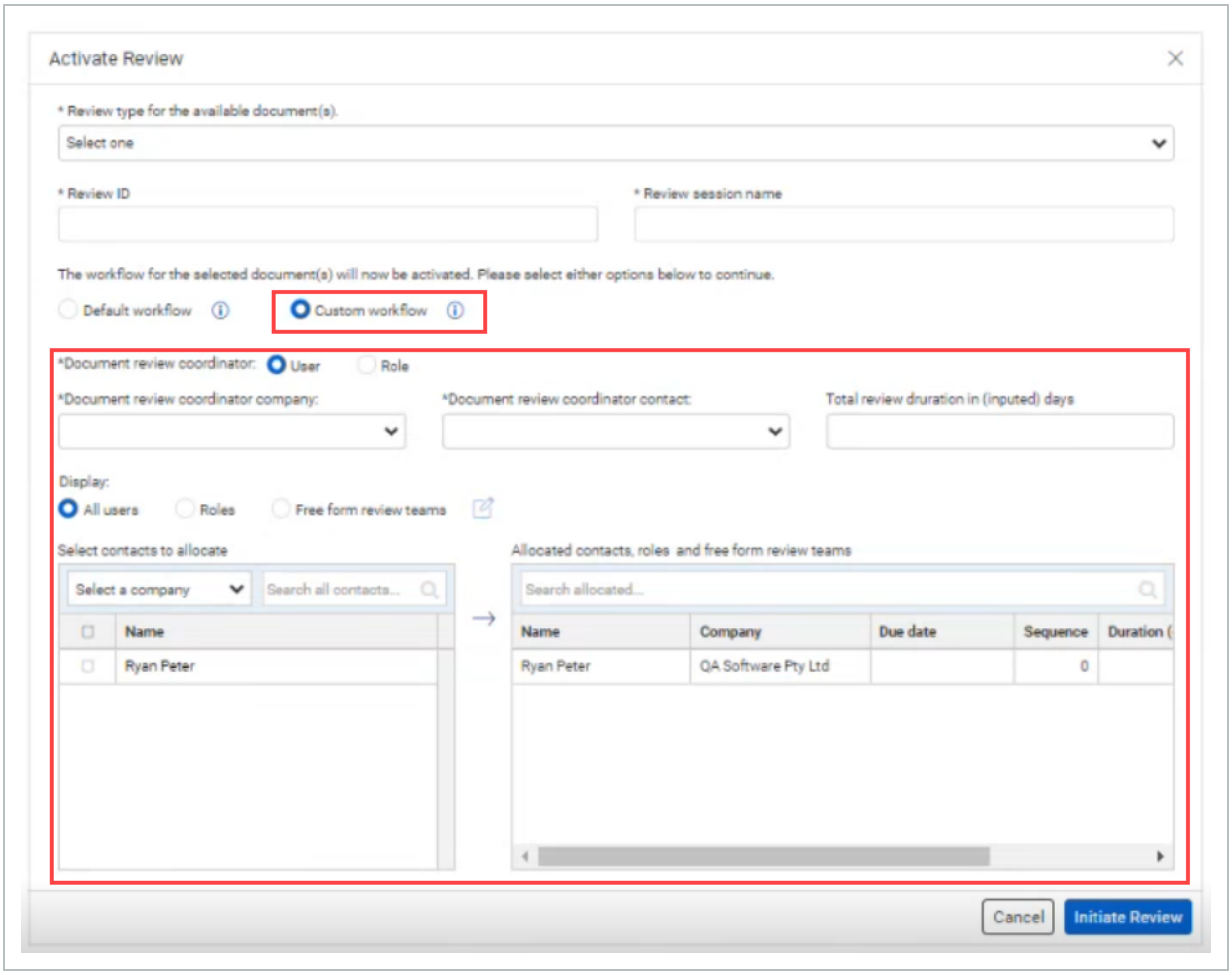
2. Verify that the Manage Document Workflow page view is set to *Review not started*. Select the documents to activate the review process.



3. Click the **Activate** button.
4. From the Review type for the available document(s) drop-down list, choose the review type for the documents. If the documents will be reviewed using one of the possible integrations, such as to Bluebeam or Microsoft Office, select the applicable review type. If the documents are to be reviewed in Document, select **Document**.

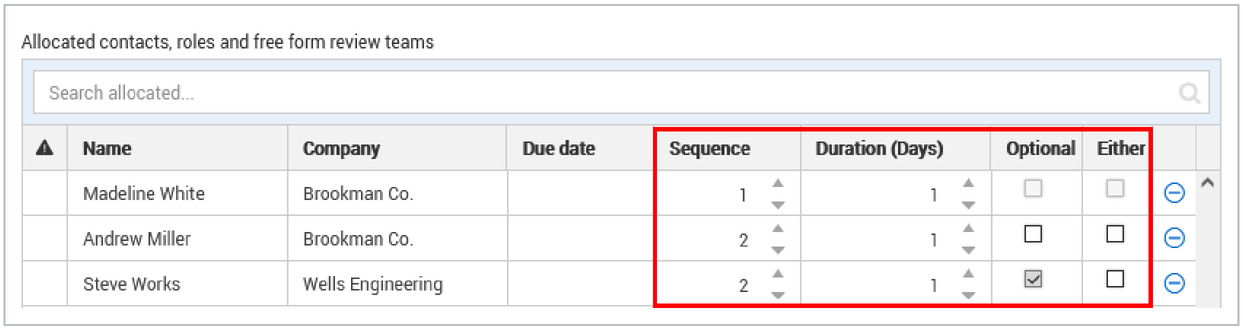


5. If applicable, enter the review session ID and the review session name. The system also applies these values automatically, so the project can use a predefined session ID format. These values help identify the review documents and can be used in filtering or grouping documents.
6. Select the option **Custom Workflow**as the workflow type. The dialog expands to show workflow options.



If the documents selected all relate to the same rules based review team, the Review Coordinator will be auto selected at the review team members window. The default review members will be listed, these can be altered if required.

7. Select the **Review Coordinator** or **Role** for the Review.
8. Select the **Reviewers** to make up the review team. use the Company drop-down list to select the company the reviewers belong to. Then move the relevant contacts to the right hand pane.
9. Repeat the above step for any reviewers from other companies.
10. Enter the required **sequence** and **review duration** for each reviewer.



Allocated contacts, roles and free form review teams

Search allocated...

▲	Name	Company	Due date	Sequence	Duration (Days)	Optional	Either
	Madeline White	Brookman Co.		1	1	☐	☐
	Andrew Miller	Brookman Co.		2	1	☐	☐
	Steve Works	Wells Engineering		2	1	☑	☐

11. Enter the **Total** Review Durations for the review.
12. Click **Save** to activate the workflow and click **OK** at the confirmation message.

NOTE

- You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending and descending order.
- Instead of selecting reviewers directly from the address book, you can select them via Free Form Review teams or roles already defined. Users can be removed or added to the list as required.
- The reviewers are notified in order of sequence to complete their reviews.
- When you activate workflow for documents that have the same review team, Document automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Review or Release register for you to use to filter the register to quickly find all documents in the workflow.

5.5 MODIFY AN IN-PROGRESS WORKFLOW

A workflow can be modified once it has been activated. You can add or remove reviewers, change the sequence or durations of the reviewers, or reactivate a completed reviewer.

MODIFY AN IN-PROGRESS WORKFLOW

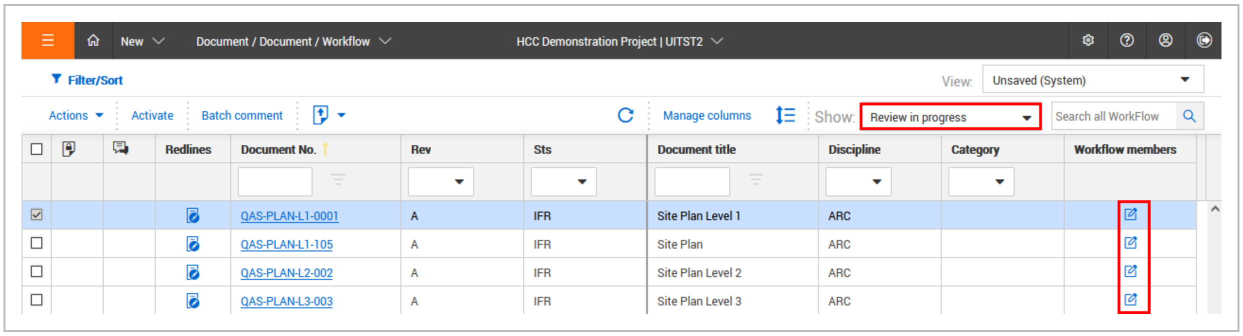
Summary: Modify an in-progress workflow when you want to add, remove, or reactivate reviewers.

1. From the Module menu, hover over Documents, and then select **Manage workflow**. Alternatively, from the Dashboard Workflow widget, select **Awaiting activation**. The Manage

Document Workflow page opens.

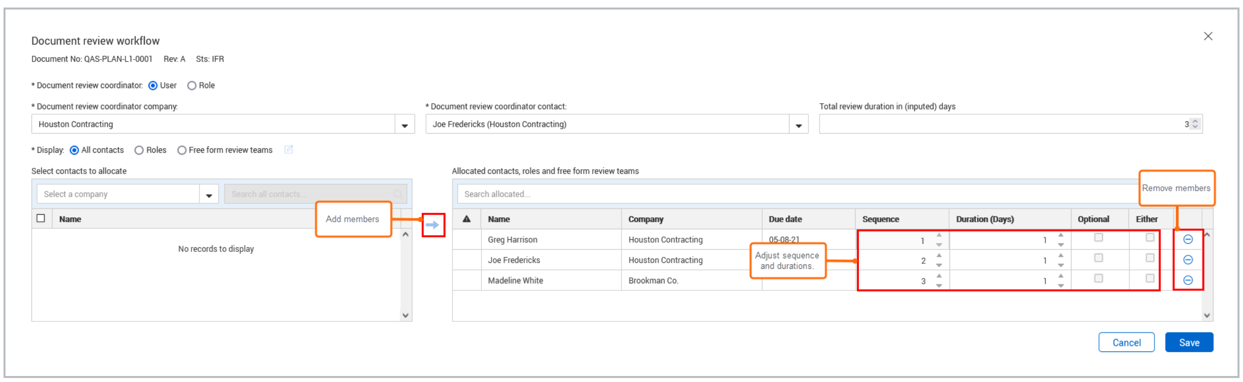
3. Change the Show option to *Reviews in progress*.

4. Click **Edit** icon for the document to modify the workflow.



The Document review workflow dialog box opens.

5. Add or remove members from the workflow or modify the sequence and durations for each reviewer as required. Reviewers who have completed their review cannot be removed or adjusted.

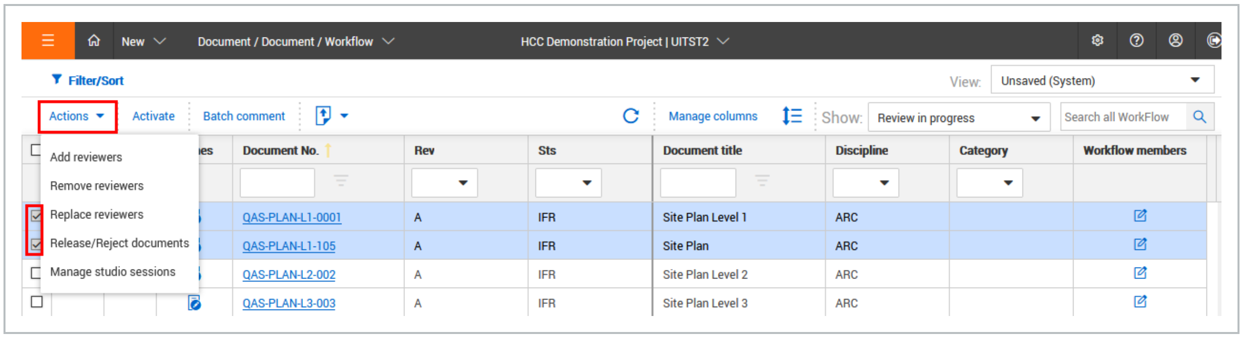


6. Click **Save**.

ADD, REMOVE, OR REPLACE REVIEWERS IN BULK

Summary: You can add, remove, or replace reviewers in bulk to save time when you have to make the same changes for multiple reviewers.

1. From the Manage Document Workflow page, select the applicable workflows, and then expand the **Actions** menu.



2. Select the action:

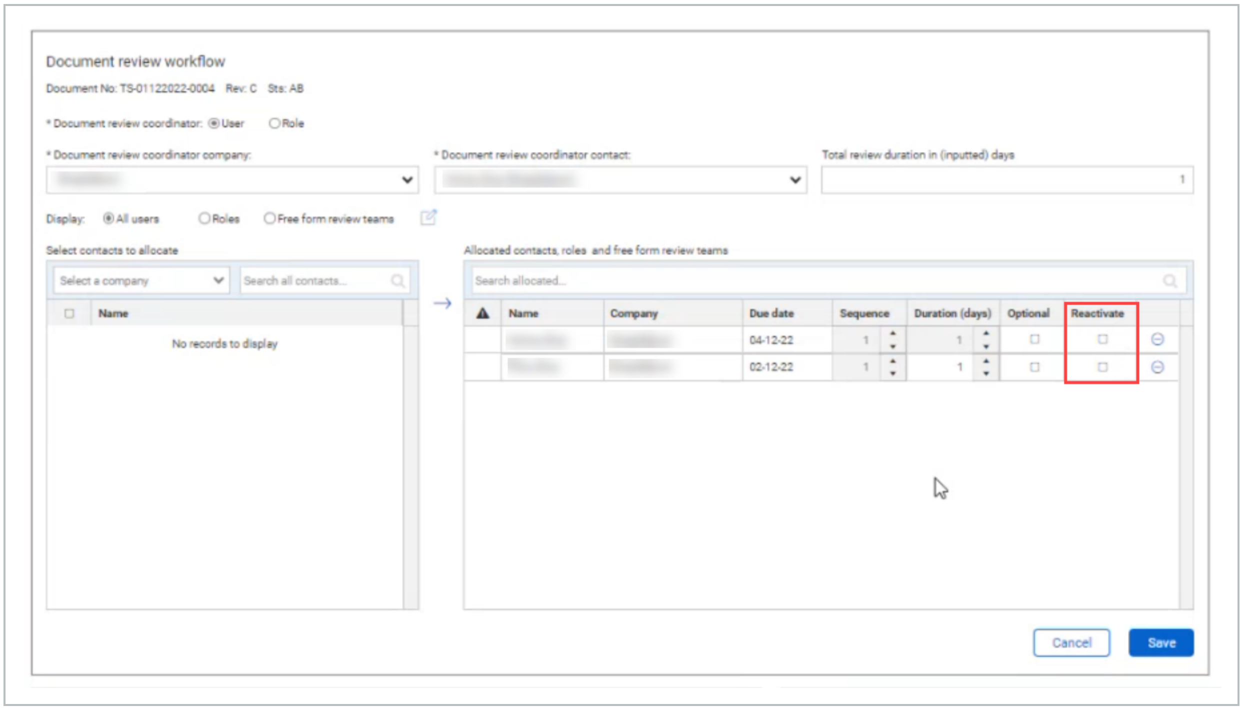
   - **Add Reviewers:** Add one or more reviewers to the in-progress workflow for the selected documents.
   - **Remove Reviewers:** Remove users or roles as reviewers if they have not reviewed the selected documents.
   - **Replace Reviewers:** Replace one reviewer with an alternative reviewer for the selected documents, subject to the reviewer being replaced having not reviewed the documents. You can replace a reviewer with a user or a role.

REACTIVATE A COMPLETED REVIEWER

Summary: You can reactivate a completed reviewer if that reviewer needs to return to the document to make additional comments or redlines.

Considerations: A reviewer can be reactivated only when the workflow is in the same workflow step.

1. On the Manage Document Workflow page, change the Show option to *Reviews in progress*.
2. Click the **Edit** icon for the document to modify the workflow. The Document review workflow dialog box opens.
3. Select the **Reactivate** check box for the reviewer you want to reactivate.



4. Click **Save**.

5.6 REVIEWING DOCUMENTS

Reviewers receive an email notification advising of documents that require their review by a required date. The reviewers then review the documents either on-line or by downloading and printing them for manual mark up.

Each reviewer must complete their Review using the **Document Review** page to record their review comments into the system. The Review screen can be used to:

- Mark up the drawings online
- Make text comments against the document online
- Attach an external file, for example, an Microsoft Word document of comments
- Attach a scanned copy of a hard copy mark-up

The Review page is also used to indicate that a reviewer has completed their review and the date. An email notification is then sent to the next reviewer in sequence and a notification is sent to the review coordinator informing the reviewer has finished.

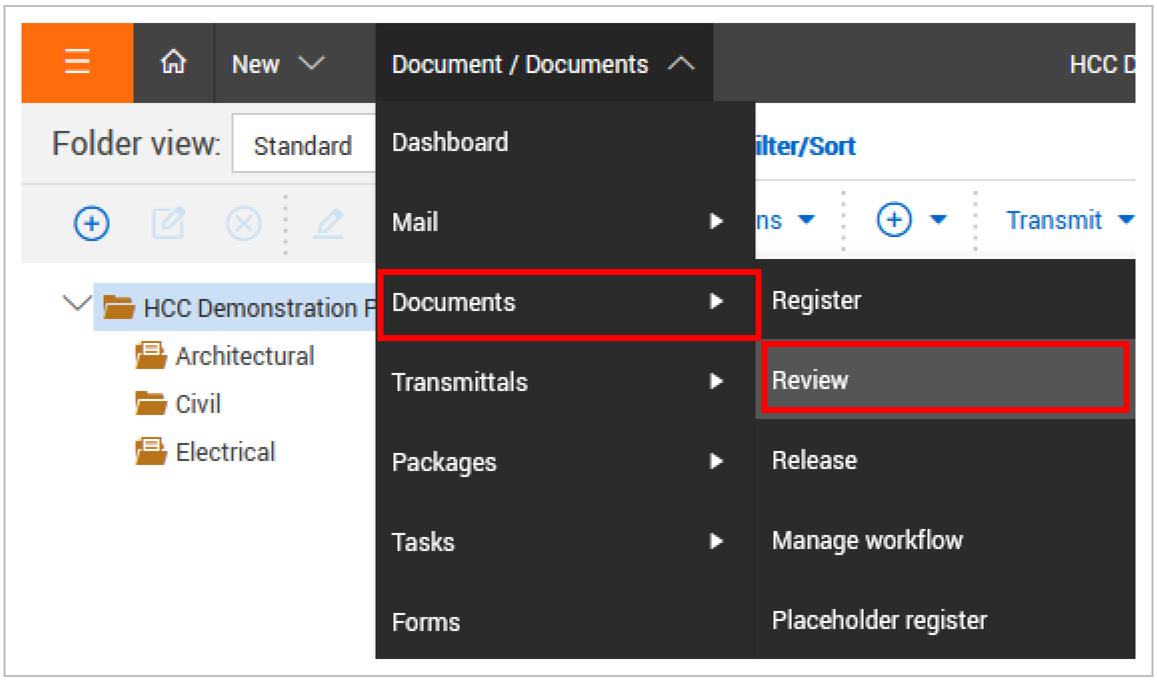
REVIEW A DOCUMENT

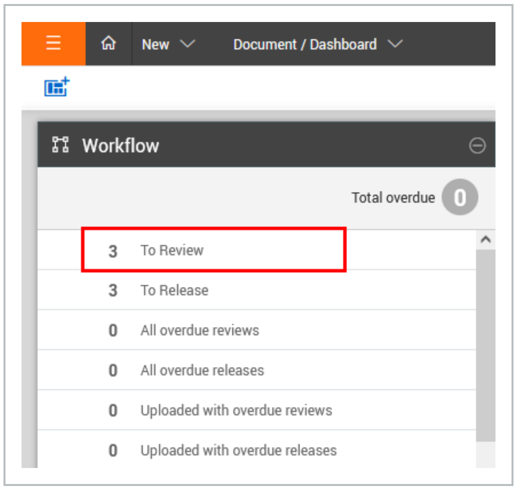
Summary: You can review documents assigned to you from the document review screen.

Considerations: InEight Document has been fully integrated with Bluebeam Studio to enable document reviews via Bluebeam rather than the Online Viewer tool. Contact InEight for details.

Review Coordinators showing "Where I am the review Coordinator" option enables a Review Coordinator to perform a proxy review on behalf of another reviewer. This might be necessary if a reviewer is unable to review a document for any reason, and the review process might otherwise be held up.

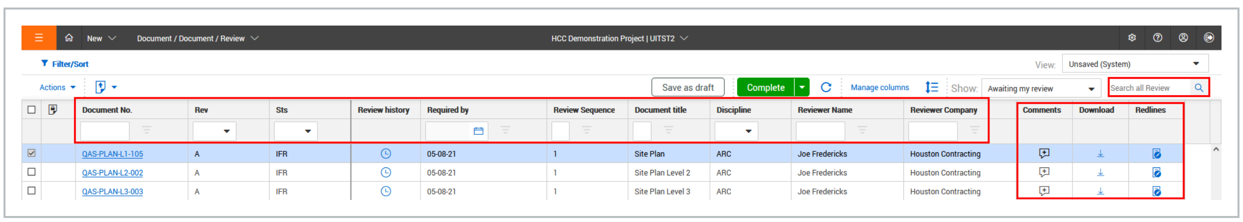
1. From the **Module Menu**, hover over **Documents** and select **Review**. Alternatively use the hyperlink in the **Workflow** Widget on the Dashboard .





The review register opens.

2. Locate the documents you want to review. If there are many documents awaiting review, use the Search box or filters.



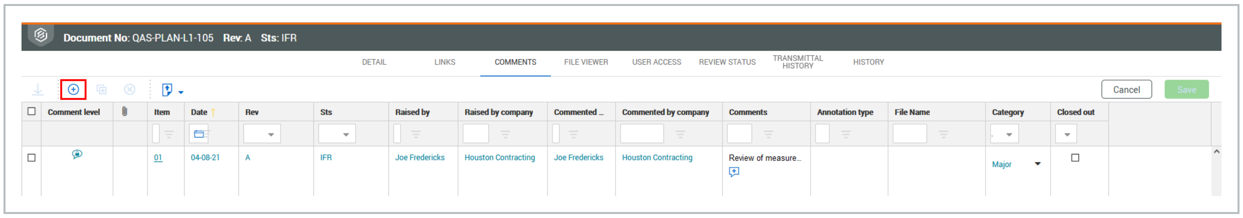
The review window can be customized to control the columns that are displayed by clicking **Manage Columns**.

NOTE	If you are a review coordinator, when viewing the *All* or Where I am the review Coordinator option, the Reviewer and Review Company columns also show in the register.

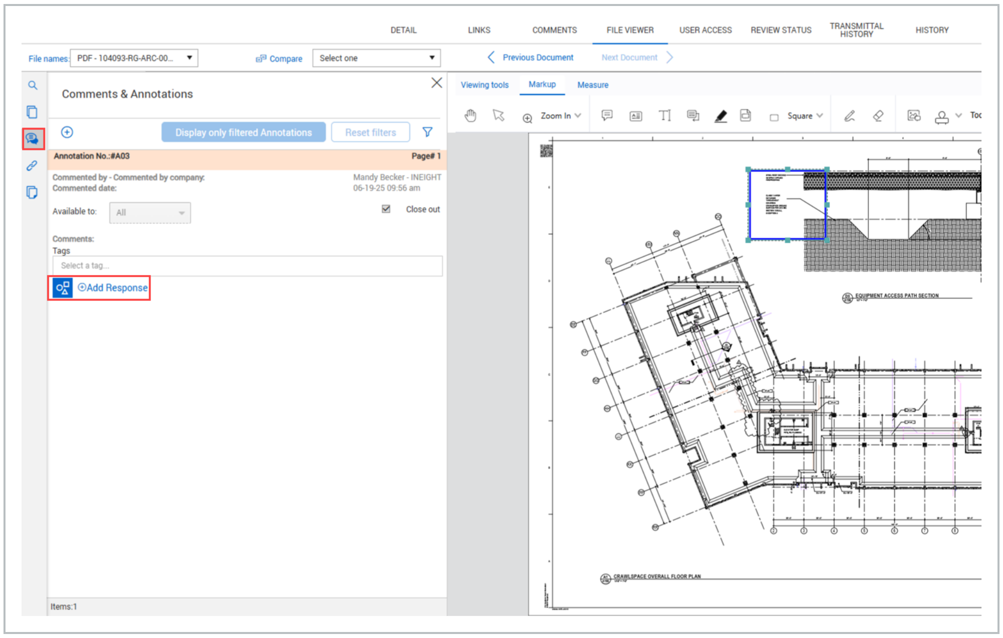
3. Click the **Redlines** icon of the document you want to review to open the document in the online viewer (if activated on your project). The document can be marked up, and text comments can be added (see 1.5 PDF viewer toolbars on page 17).

4. Click the **Comments** icon to add electronic comments to the documents.

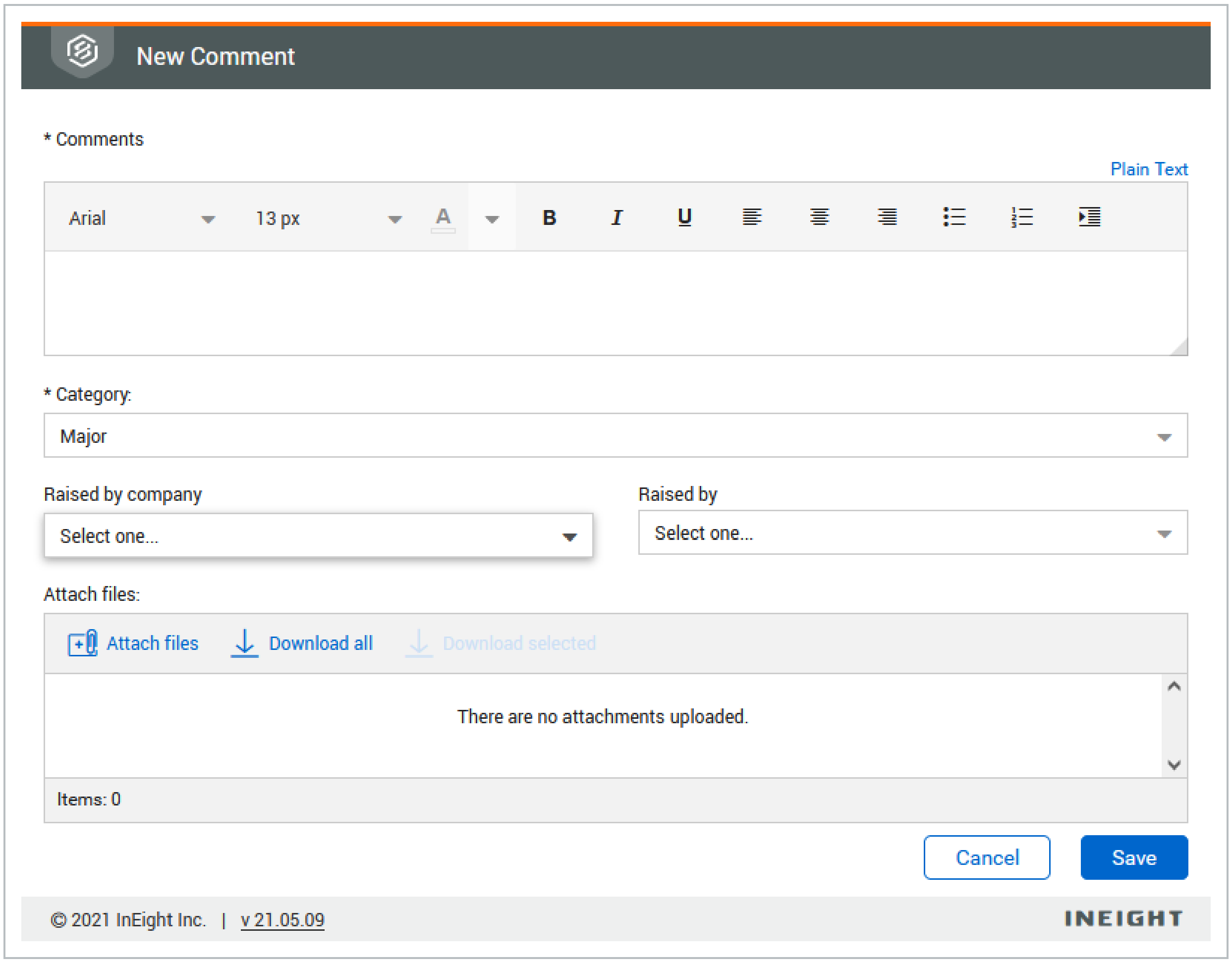
5. In the new window, click the **plus** button to add a comment.



To add a response to an existing comment, right-click on the annotation, and then click **Add Response**. Alternatively, you can click the **Comments** icon to open the Comments and Annotations panel, and then click **Add Response**.

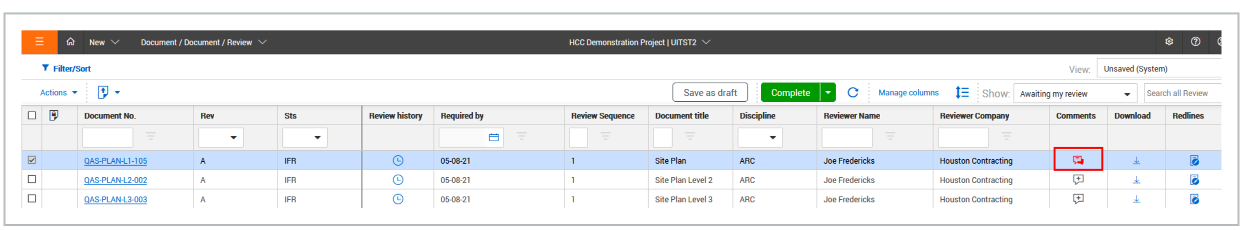


6. Attach external files if needed. Click **Attach Files** and select one or more files to attach and click **Open**.

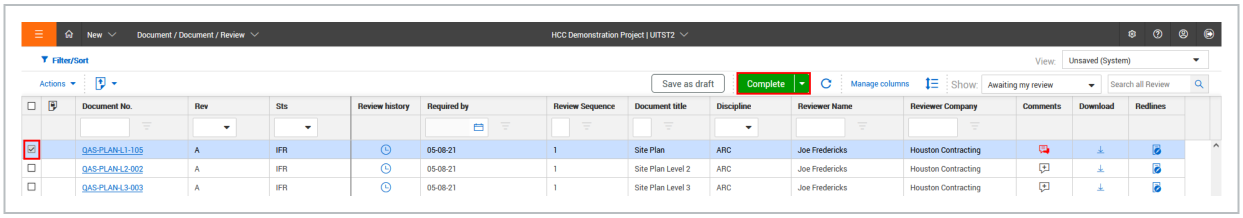


A comment raised on behalf of a third party is specified in the Raised by value. You can also select a **Category** for your comment, if applicable.

7. Click **Save** when finished to return to the Comments window and close the window to return to the Document list in the Review register. The comment icon changes to a red icon to indicate that there is an outstanding comment against the document.



8. After your reviews are complete,select the Documents in the Document Review register, and then click **Complete**.



The document continues to be listed as *Awaiting review* until the **Completed** box is selected and saved. Document sends out automatic reminders via email if reviews are not completed by each reviewer within the predetermined durations.

What's next: On completion of the review, the next reviewer is notified to complete their review (serial workflows).

When all reviews are complete, the review coordinator is notified. When there is a serial or parallel review workflow, the review coordinator is notified that all reviews have been completed after the last reviewer completes their review.

5.6.1 BYPASS THE REVIEW WORKFLOW

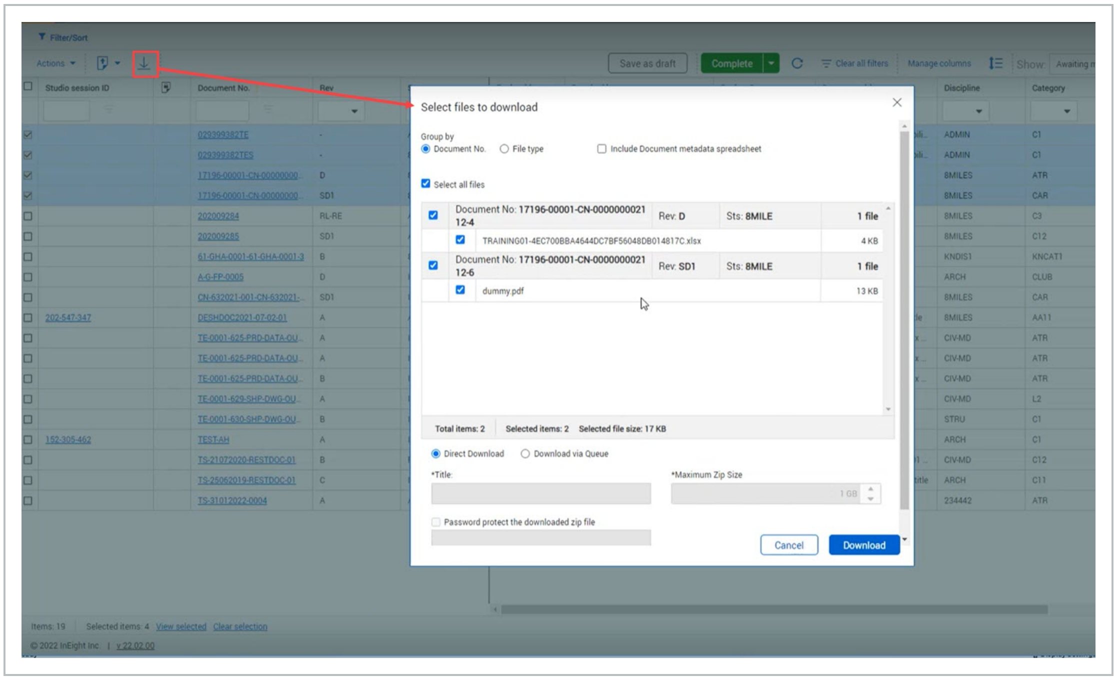
To bypass the workflow process, a reviewer can select Complete > **Send to review coordinator** from the Document Review page. When this option is selected, Document Completes the workflow process and passes control of the document to the review coordinator, bypassing all other reviewers who have not yet completed their reviews.

5.6.2 OFFLINE REVIEWS

Sometimes it might be necessary to conduct reviews offline. You can download one or more documents to a PC for either printing or offline review. If the hard copy is marked up, scan and upload as an attachment.

- To download a single document, click the **Download** icon to download the document
- To download multiple documents, click the **Download** icon in the toolbar, and then select the

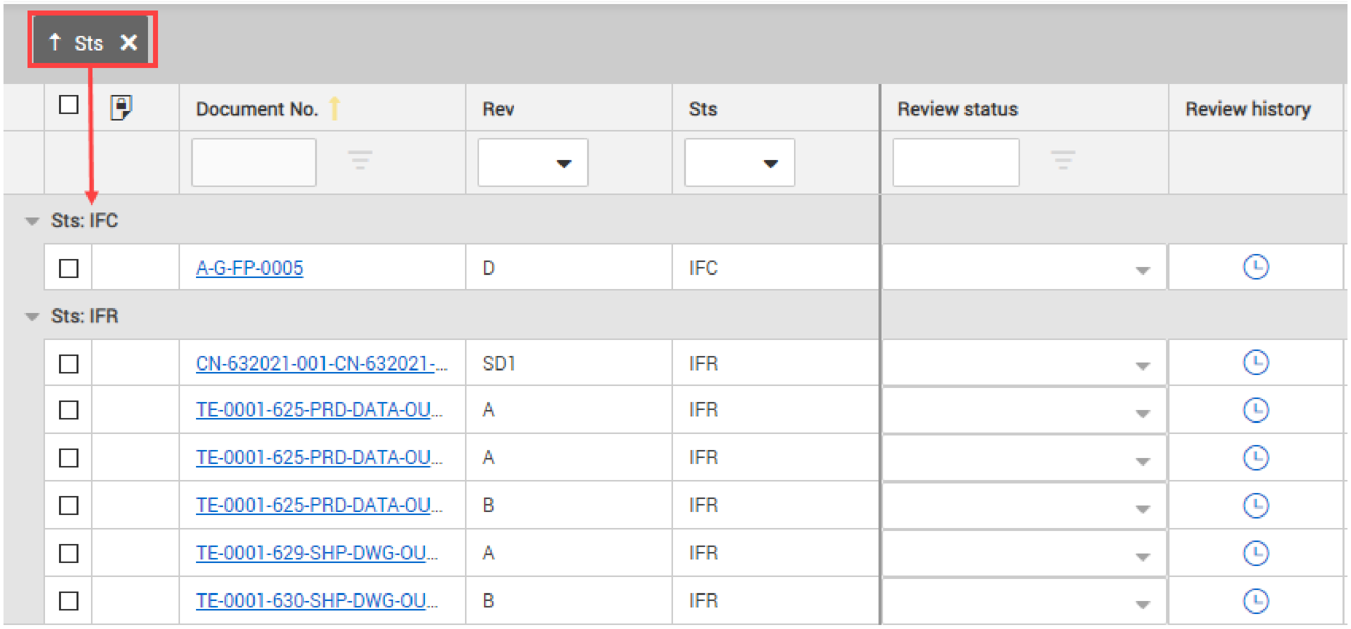
files from the Select files to download dialog box.



5.6.3 GROUP ITEMS IN THE DOCUMENT REVIEW REGISTER

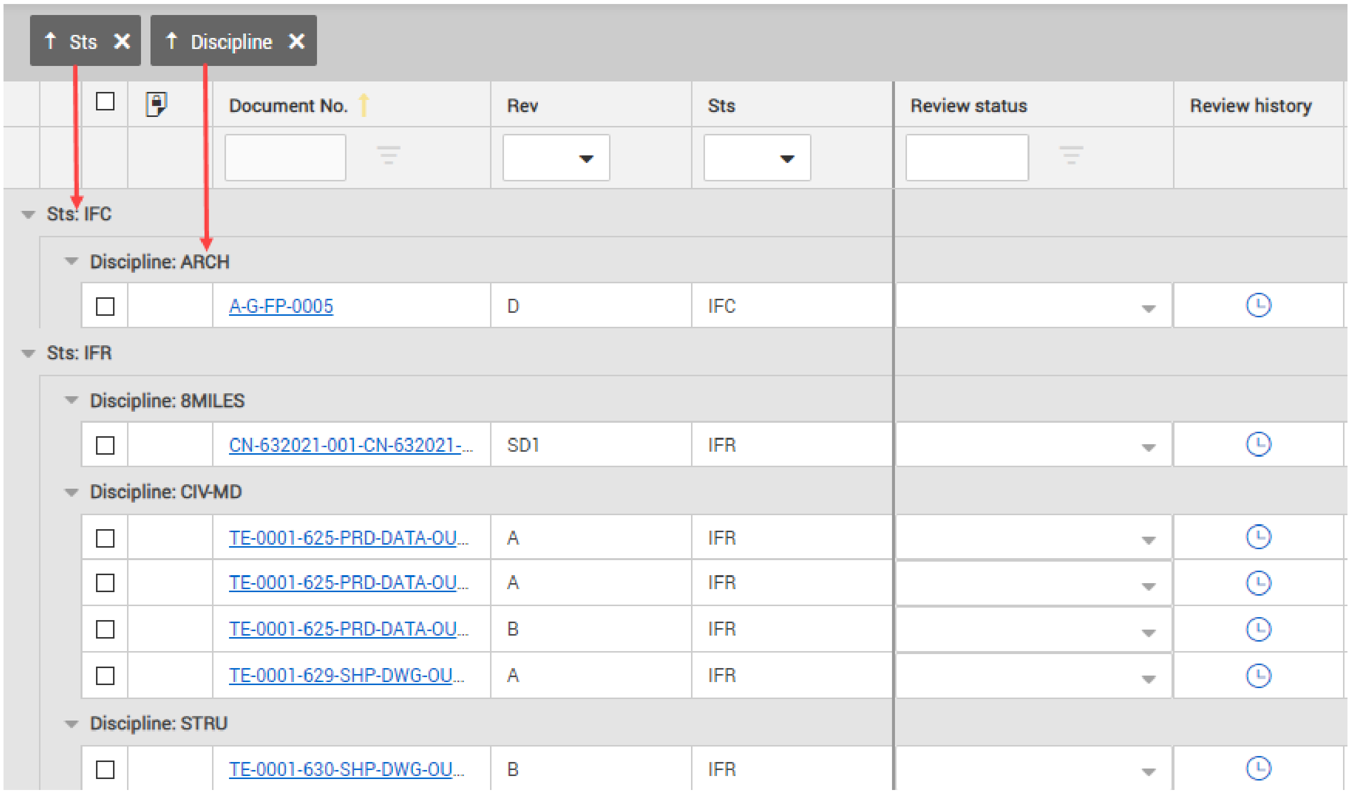
You can group entries in the Document review register by available register columns to help you quickly locate documents.

The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Sts column to the bar, the documents are grouped by status. In the image below, the documents are grouped by status in ascending order. The documents with no status would come first, followed those with IFC status and then those with IFR status.



You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the document you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The documents are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline column to the scenario above, the documents would be grouped by status and then discipline within the status.

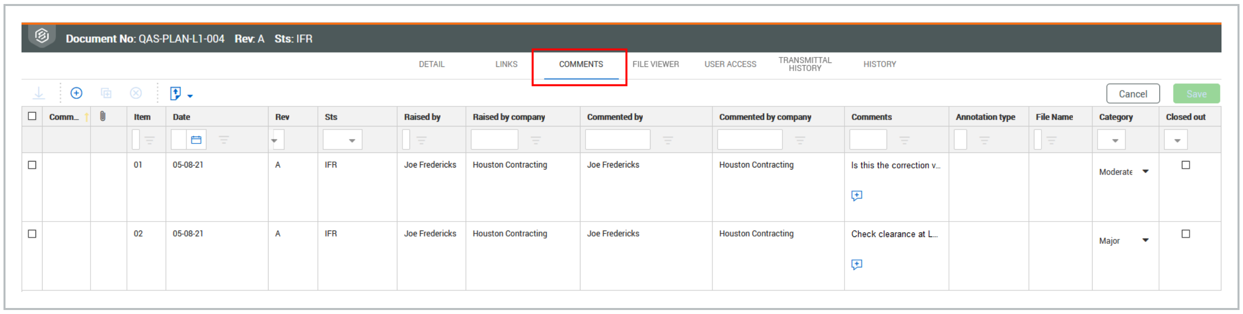


5.7 COMMENTING ON DOCUMENTS

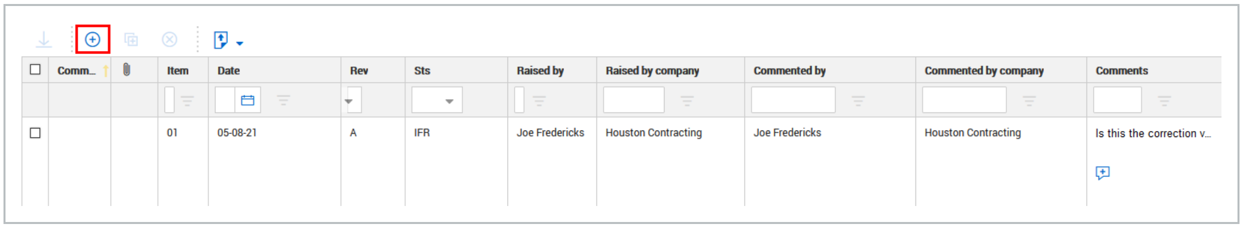
If you have access to a document, it is possible to make text comments about the document from within the document register. Comments can be either added from within the document details window or from within the File Viewer.

To comment on a document:

1. From the **Document Register**, locate the document to comment on.
2. Click on the Docunoment No. link to open the details screen.
3. Select the **Comments** Tab.

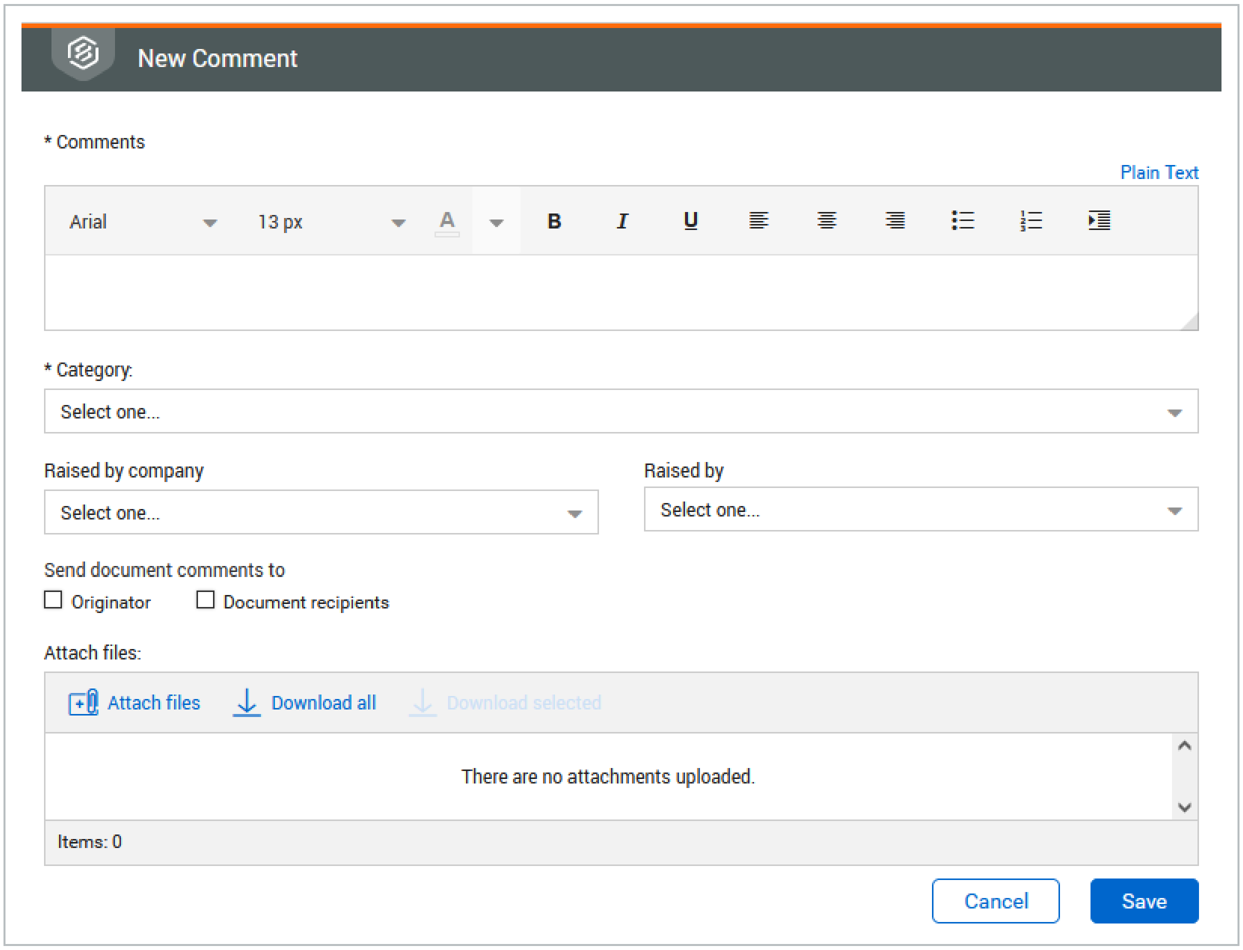


4. Click the **plus** icon to add a new comment. or click



- You can also duplicate a comment by selecting a comment and clicking the **Duplicate** icon.

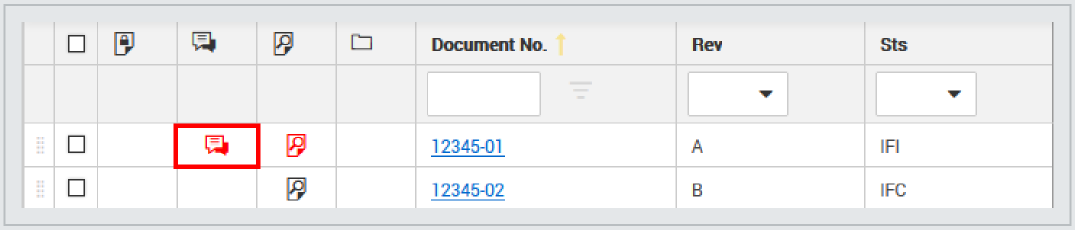
5. At the **Add Comment** window type the comment.



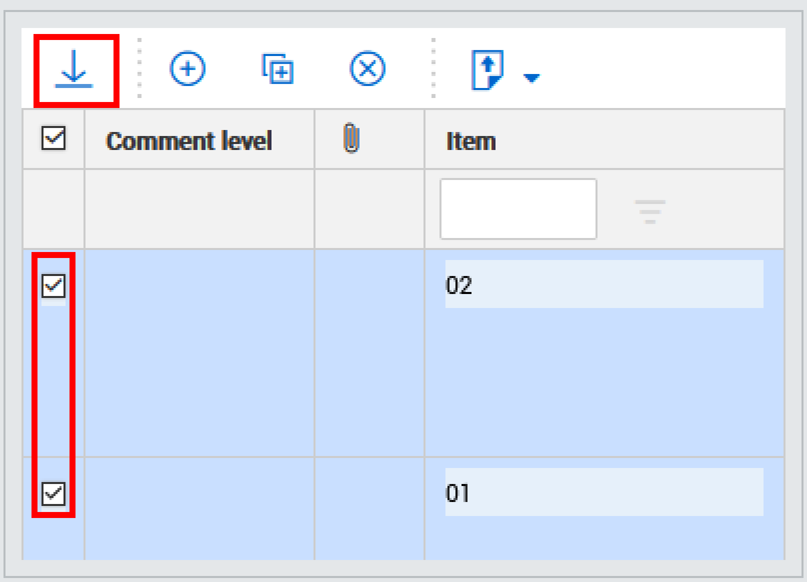
6. Select a **Category** for the comment and **Raised by** if the comment is being made on behalf of someone else.
7. Click **Attach Files** if there is a requirement to attach an external file, locate the file to upload, and click **Open**.
8. Click **Save** then **Close**.
9. Click **Close** to close the Viewer/Comments window or use the **X** in the top right hand corner of the screen.

NOTE

- Making comments by this method is not in place for making comments as part of the document review process. Completing the review is still managed in the document review process.
- Documents in the document register that have existing comments against them are displayed with a comment icon to the left of them.

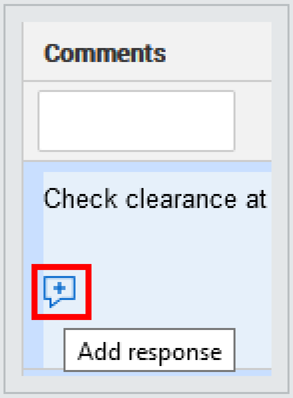


- Comments can be emailed automatically by ticking the relevant boxes to send your comments to any or all of the following:
  - The Document Originator
  - The Review Coordinator
  - Document recipients
- To apply the same comments against multiple documents you have access to, select the documents in the Document Register, click **Actions** then **Comment** and add the comments. The comments will be applied to all the selected documents.
- To download the attachments related to one or more comments in the comments register, select the comments and click the **download** icon.

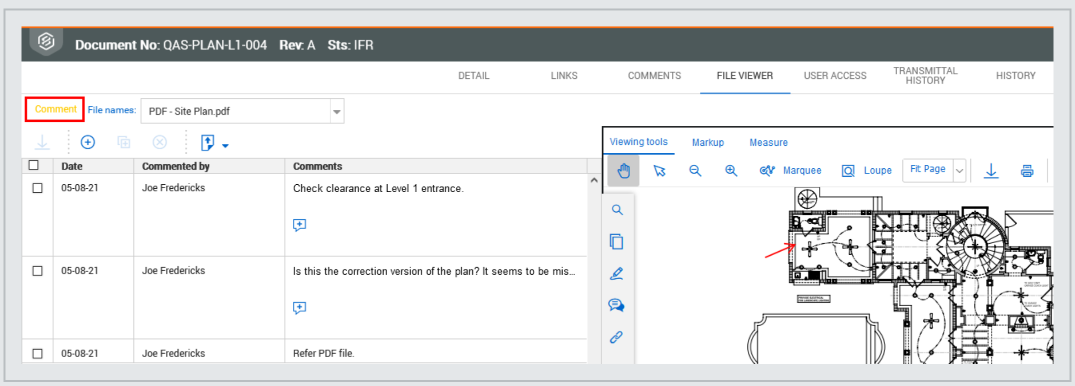


NOTE

- To respond to other users comments use the **Add Response** link in the Comments column. Your response will be added as a new comment indented beneath the comment you responded to.



- Though a review has been completed a notification may be sent that another reviewer has commented. If a response is required this can still be added from the document register (even though the document is still under review). Comments adding in this way are still considered review comments and accessible only to other reviewers and the review coordinator.
- Comments can be added from within File Viewer.. An image of the document and the comments text box can be seen together. From the File Viewer, click the **Comment** button..



- Typically comments can only be **closed out** by: the originator of the comment; the Review Coordinator; or the Project Administrator.
- Use the “Raised by” option in text comments to indicate if the comment was raised by another person. Both the Originator and Raised by person have the same access privileges to the comment.

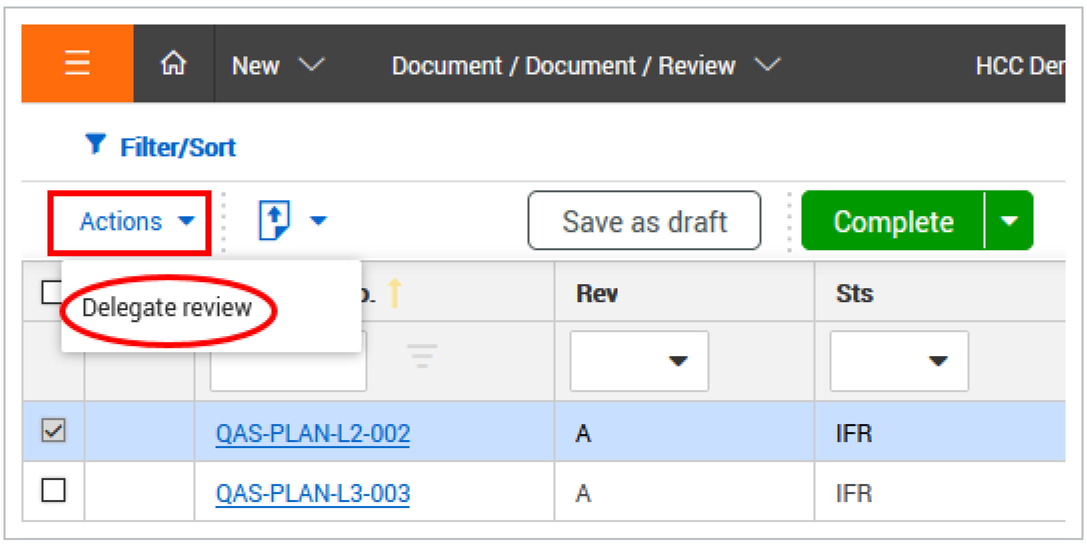
NOTE

- Both outstanding text and redline comments that are not closed out can be carried forward to the next revision of the document. Contact InEight to have this feature activated.

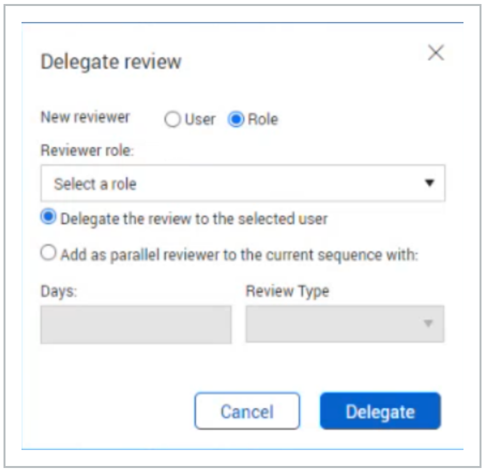
5.8 DELEGATE REVIEW

Project members may need additional input or allocate the review to someone else. This feature gives the option to delegate to another reviewer in parallel, or as a replacement for, the current reviewer.

1. Select one or more Documents from the Review Screen.
2. Click Actions, and then select **Delegate Review**. This feature is only available from the Review screen.



3. Select the **User** or **Role** in the New Reviewer field, and then select the applicable company and user or the role.



4. Select either **Delegate the review to the selected user** or **Add as parallel reviewer to the current sequence within _ days** and then select the **Review Type** from the drop-down menu as **Mandatory** or **Optional**. If the Review/Release configuration does not allow days to be added to the review, you cannot edit the Days field.
5. Select **Delegate**.

5.9 EXTERNAL REVIEWS

Documents created with Bluebeam or Microsoft products, such as Word, Excel, and PowerPoint, are frequently used in projects. Document lets you send documents in a document workflow to Bluebeam and Microsoft Office 365 to use the tools in those products to review documents.

The following topics describe the Microsoft Office integration. For information about integration with Bluebeam, see Bluebeam.

5.10 ACTIVATE MICROSOFT OFFICE REVIEW INTEGRATION

Before you can collaborate in Microsoft Office 365, you must activate the Microsoft Office integration for the project. After the integration is complete, anyone in the company can collaborate in Office.

To enable the feature, you must raise a request with the Project Delivery team.

5.10 STEP BY STEP 1 – ACTIVATE MICROSOFT OFFICE REVIEW INTEGRATION

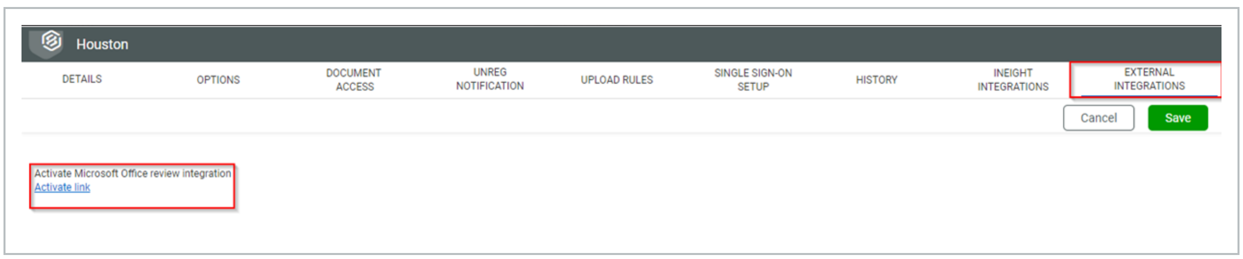
Summary: Activate the Microsoft Office review integration so that contacts in your company can send documents in a workflow to an external review in Office 365.

Considerations: The company must have Microsoft Office 365 available. You must create a service account in the Office 365 space to ensure that any access requests made by users are centralized through that account. The person setting up the account must be an administrator or relevant user for the company that is enabling the integration. The integration relies on that company's Microsoft Office 365 subscription.

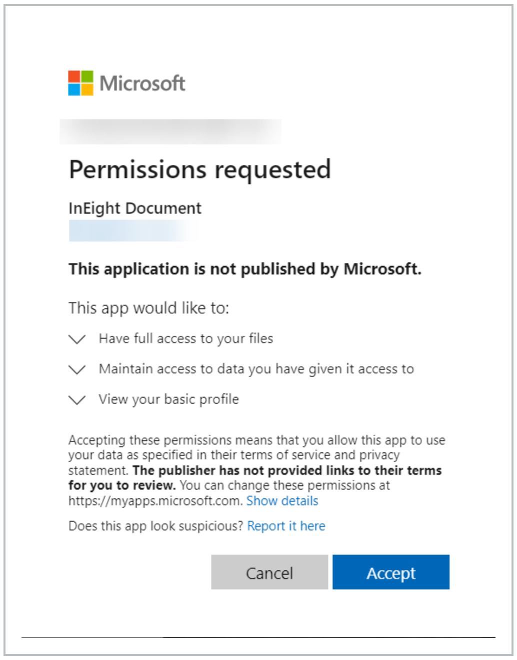
This task is performed only one time per project for the company.

Quick steps:

1. Click **Activate link** under Activate Microsoft Office review integration on the Companies > **External Integrations** page. The Microsoft permissions page for your organization opens.



2. Sign in to the Office 365 account using the credentials for the service account. This account should not be a personal account, and the project administrator should not provide details for another company. A message is sent if you try to use the same credentials as your own account.
3. Click the **Accept** button to gain the required permissions.



A success message indicating the company on the project has been linked to Microsoft Office integration opens in a new window.

4. Close the success message window.

What's next: Contacts in your company can send documents to Office 365 for external review. The link in External Integrations page is changed to Remove link. If you no longer want the integration with Office 365, click **Remove link**.

5.11 MANAGE THE MICROSOFT OFFICE REVIEW WORKFLOW

The Manage document review page (Documents > **Manage workflow**) lets the review initiator quickly sort and search for documents and initiate the external review workflow.

NOTE	Changes made in the viewer are not shown in the file in Office. You must use one or the other during review. Changes in Office come back into Document after the review.

MANAGE THE EXTERNAL REVIEW WORKFLOW

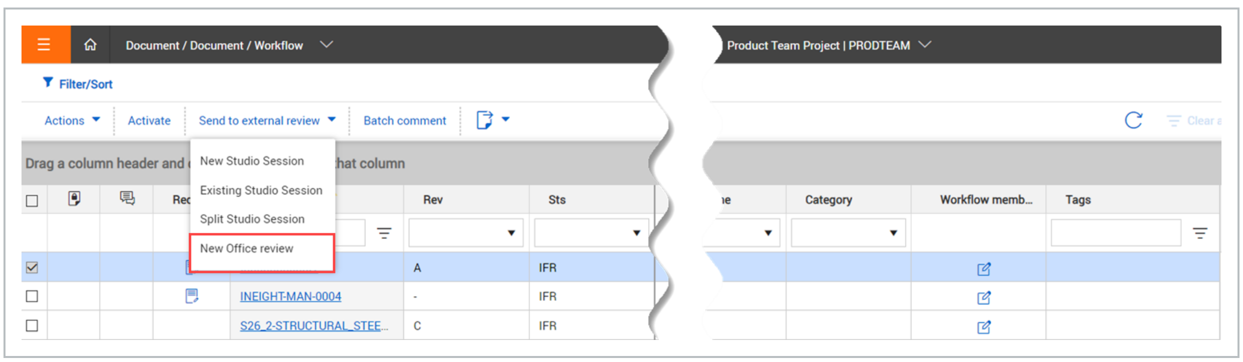
Summary: Use the manage workflow features to send a document to Microsoft Office 365 for collaborative review.

Considerations: The documents must be uploaded into a restrained status and contain only one Office file format. If a document contains multiple Office-supported formats, you cannot initiate the review. The review coordinator and review initiator must be from the same company. For information about submitting documents for review, see Upload of Documents for Review. Contact your InEight representative if you want to include external companies in collaborative reviews in Office 365.

NOTE	To use the integration in Chrome, a ClickOnce Helper extension must be enabled for the browser.

Quick steps:

1. From the Manage document review page, select the documents you want to send to review.
2. Click **Send to external review**, and then select **New Office review**.



The Activate review dialog box opens.

3. Select **Default workflow** or **Custom workflow**, and then click **Apply**. See Activating a Default Workflow and Activating a Custom Workflow for more information about the default and custom review workflows. The workflow is activated, and the documents are sent to the Review register.

What's next: The reviewer can open the documents in Office 365 to conduct collaborative reviews..

NOTE You can send documents to users from different companies, but you must request it through InEight. The company must ensure that companies outside your own company can access the OneDrive account to review the files. A standard Microsoft message is sent if this access is not provided, and other company users will not be able to access the files.

5.12 REVIEW A DOCUMENT IN MICROSOFT OFFICE

You can open a document that has been sent for external review in Microsoft Office from the Review register. The workflow can include contacts inside and outside of your company. If you want to include contacts outside your company, you must first ensure that access is addressed with your IT team, and then contact your InEight representative to turn off the internal contact validation.

You can view the version of the Office file that was in place prior to the edits made through an Office review. To view the previous version, expand the Actions menu, and then select Original View File > **Prior to Office Review**.

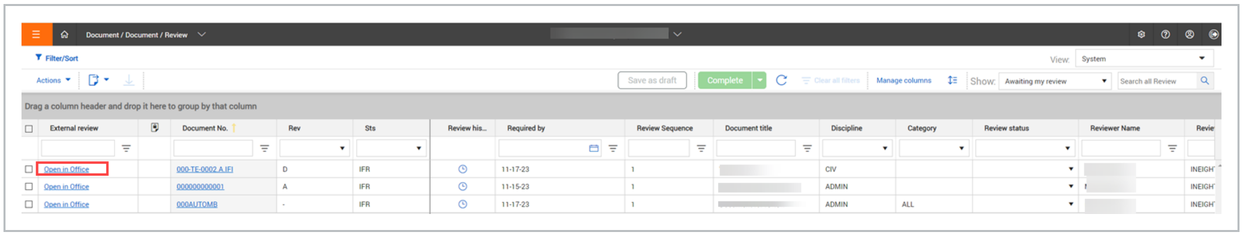
NOTE Changes made in the viewer are not shown in the file in Office. You must use one or the other during review. Changes in Office come back into Document after the review.

REVIEW A DOCUMENT IN MICROSOFT OFFICE

Summary: Send a document to review in Office 365 to take advantage of collaborative review features in Office products. Non-macro enabled files, such as those with .docx or .xlsx extensions, and macro enabled files, such as those with .docm or .xlsm extensions, are supported.

Considerations: The document must have already been sent as a New Office review in the review workflow register. See Manage the Microsoft Office review workflow for more information about sending a document to Office 365. If the contact is from outside of your company, you must ensure that their company can access your OneDrive location to review the files.

1. From the Review register, click the **Open in Office** link for the document you want to review. The document opens in an Office 365 application, such as Word or Excel, in a new window.



2. Review the document in the Office application. You can use the tools in the Office product to collaborate with other reviewers.
3. After reviewing, return to the Review register, and then update the status.
4. Select the document, and then click the **Complete** button. The document is removed from the Review register.

What's next: Reviewers maintain view access to the documents after their reviews are completed, while the review coordinator has view access to the document prior to receiving it to release or reject. This access lets the review coordinator see comments and edits that are being made in advance.

For more information about reviews, see Reviewing Documents.

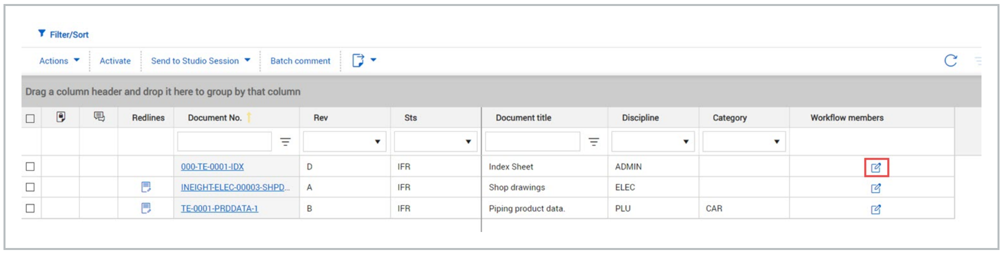
5.13 MANAGE REVIEW COORDINATORS

A project administrator or the review initiator can update the review coordinator for a document individually or in bulk.

UPDATE THE REVIEW COORDINATOR FOR A SINGLE DOCUMENT

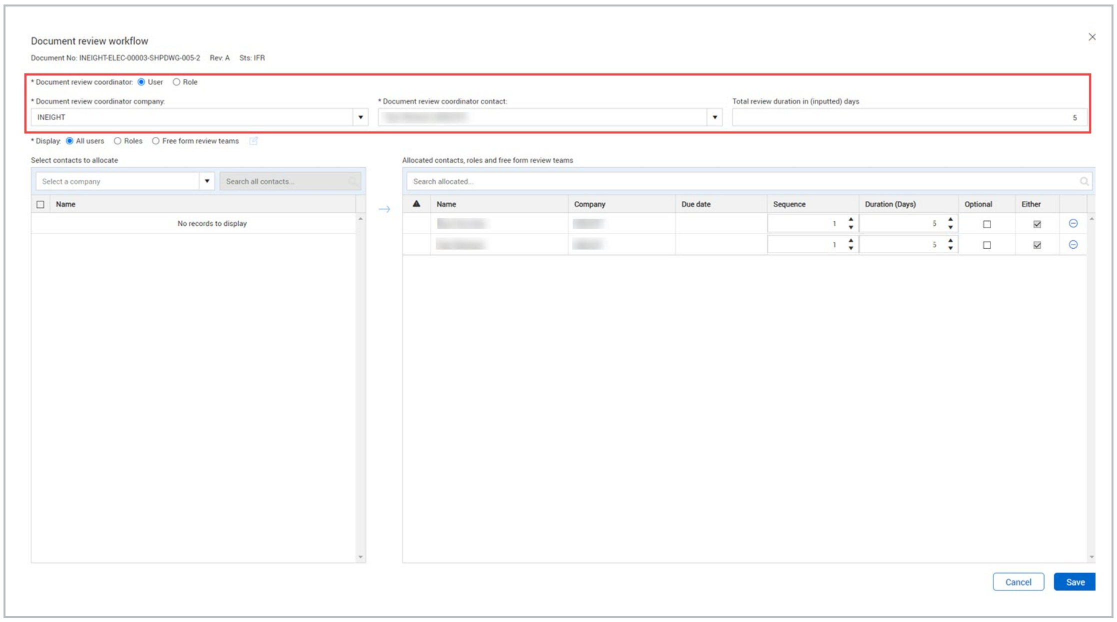
Project administrators and the review initiator can edit the workflow members when you want to update the review coordinator for a single document.

1. From the Document workflow page (Documents > **Manage workflow**), click the **Add/Edit workflow member** icon for a document.



The Document review workflow dialog box opens.

2. Use the Document review coordinator radio buttons and drop-down lists to select a user or role.

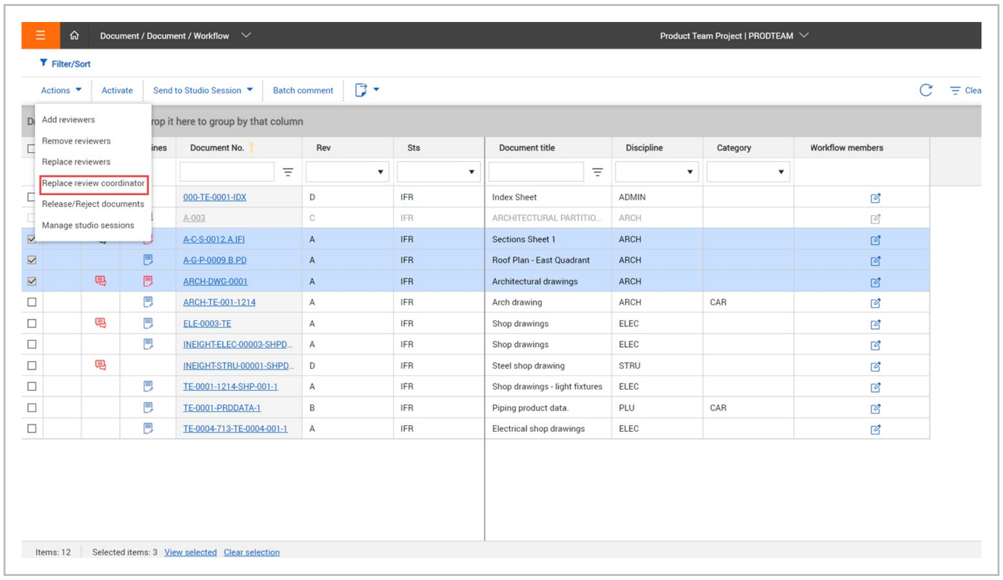


3. Enter the review coordinator company and contact, and then click **Save**.

UPDATE THE REVIEW COORDINATOR FOR MULTIPLE DOCUMENTS

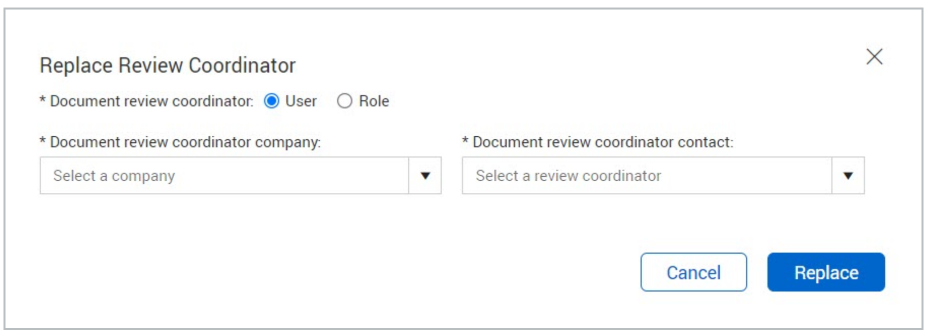
Use these steps when you want to update multiple documents with the same review coordinator.

1. From the Document workflow page (Documents > **Manage workflow**), select one or more documents, and then expand the **Actions** menu and select **Replace review coordinator**.



The Replace Review Coordinator dialog box opens.

2. Use the Document review coordinator radio buttons and drop-down lists to select a user or role.



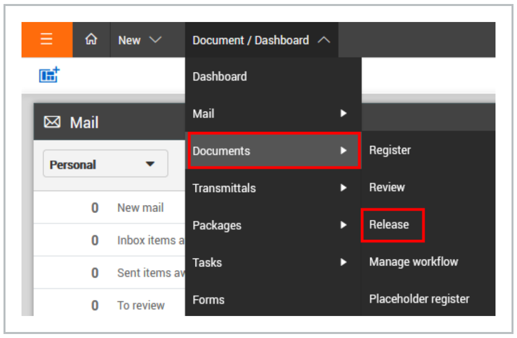
3. Enter the review coordinator company and contact, and then click **Replace**.

5.14 DOCUMENT REVIEW APPROVAL/RELEASE

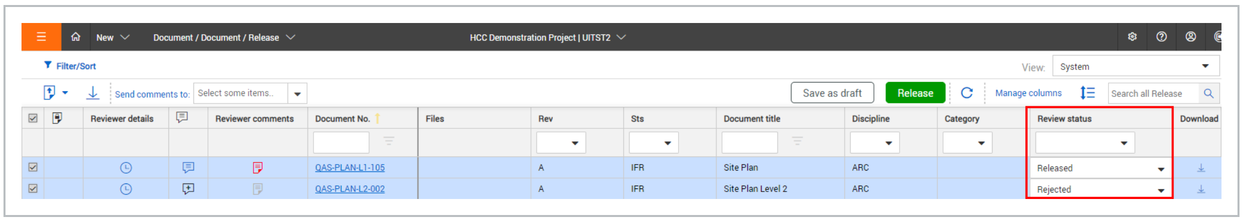
After all reviewers have completed their reviews of a restrained document in a workflow, the Review Coordinator receives an email notification. The Review Coordinator uses the **Document Release** screen to conduct their own review, select comments to include, and apply a review status, which will either releases or rejects the document.

Using the Document Release screen:

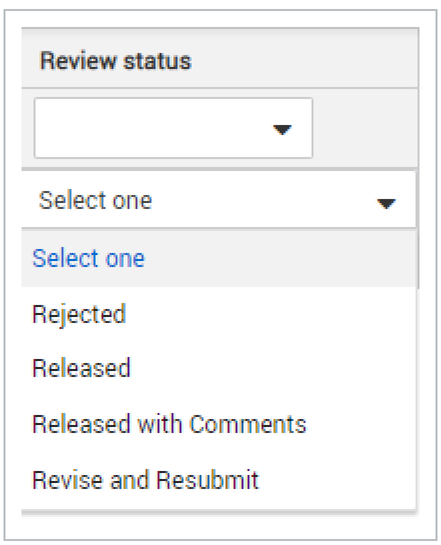
1. From the **Module Menu**, hover over **Documents** and select **Release**.



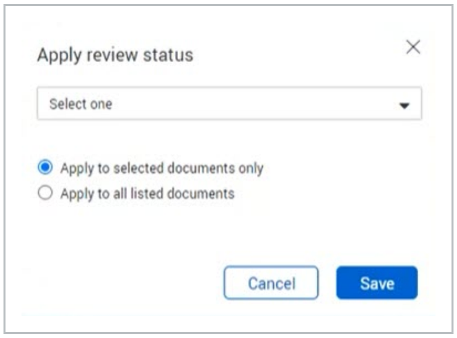
2. The Documents awaiting release screen defaults to displaying **All documents awaiting release** by the logged in Review Coordinator.



3. If there are many documents awaiting release, use the Search box or Advanced Document Search options to locate the required documents.
4. Allocate **a Review Status Code** as applicable to each document.
   - For a single document, select the document, and then select a status from the Review status drop-down list.

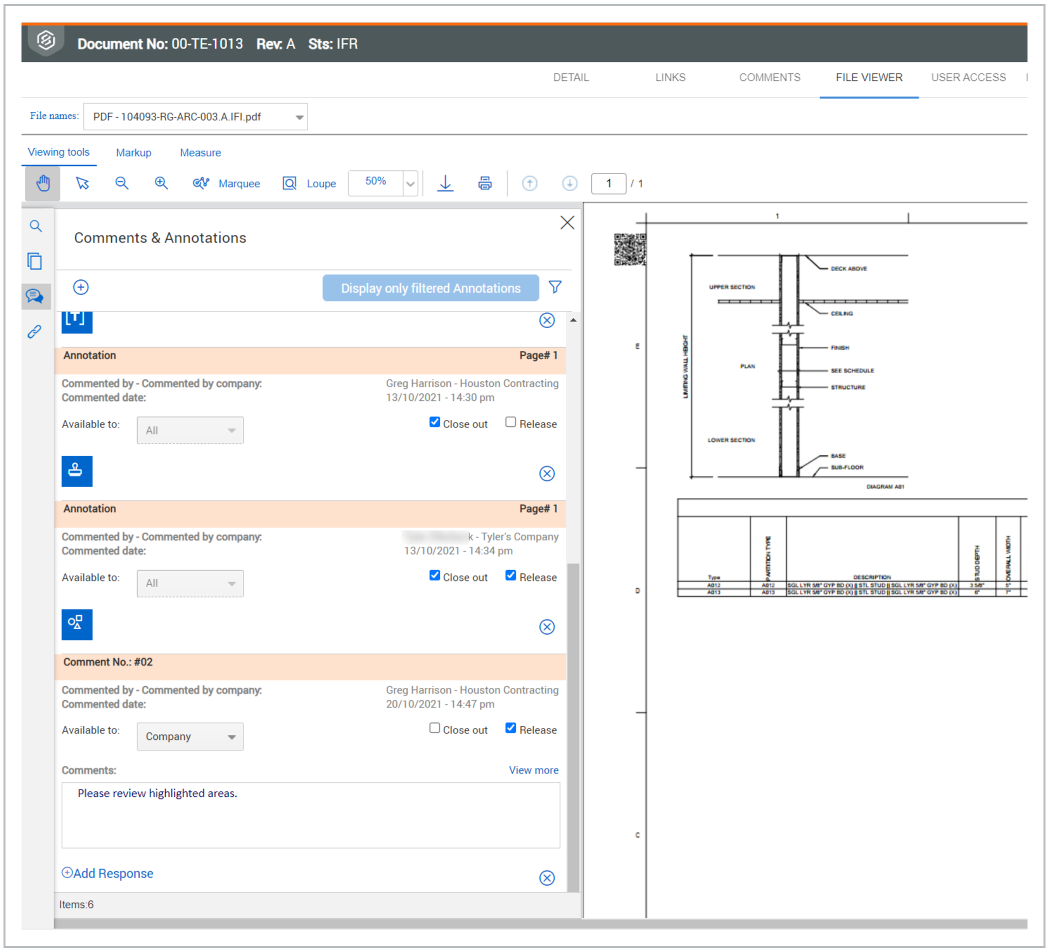


- For multiple documents, select the documents, and then click Actions > **Apply review status**. The Apply review status dialog box opens, and then you can select the status. You can apply the status to the selected documents only or to all documents in the view.



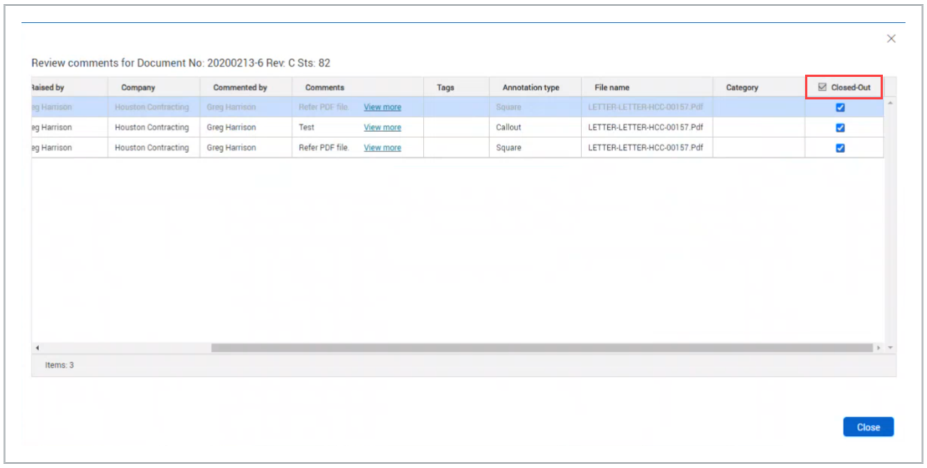
  Click **Save** to apply the status.

5. The review options for the Review Coordinator are the same as those of the Reviewers in the Document Review Wizard which are:
   - Download
   - Redlines
   - Text comments
   - Attach external files to their comments.
6. The Review Coordinator is able to view outstanding Reviewer comments and close them out as required:
   a. Click the Redline  icon to open the File Viewer to view markups and comments made against the file. Click the **Comments** tab to see a full list of comments.

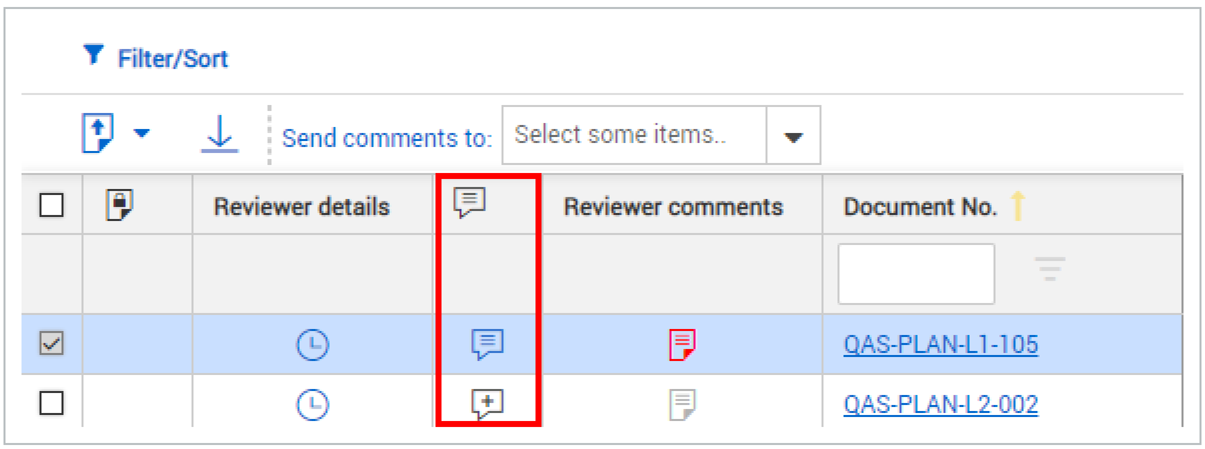


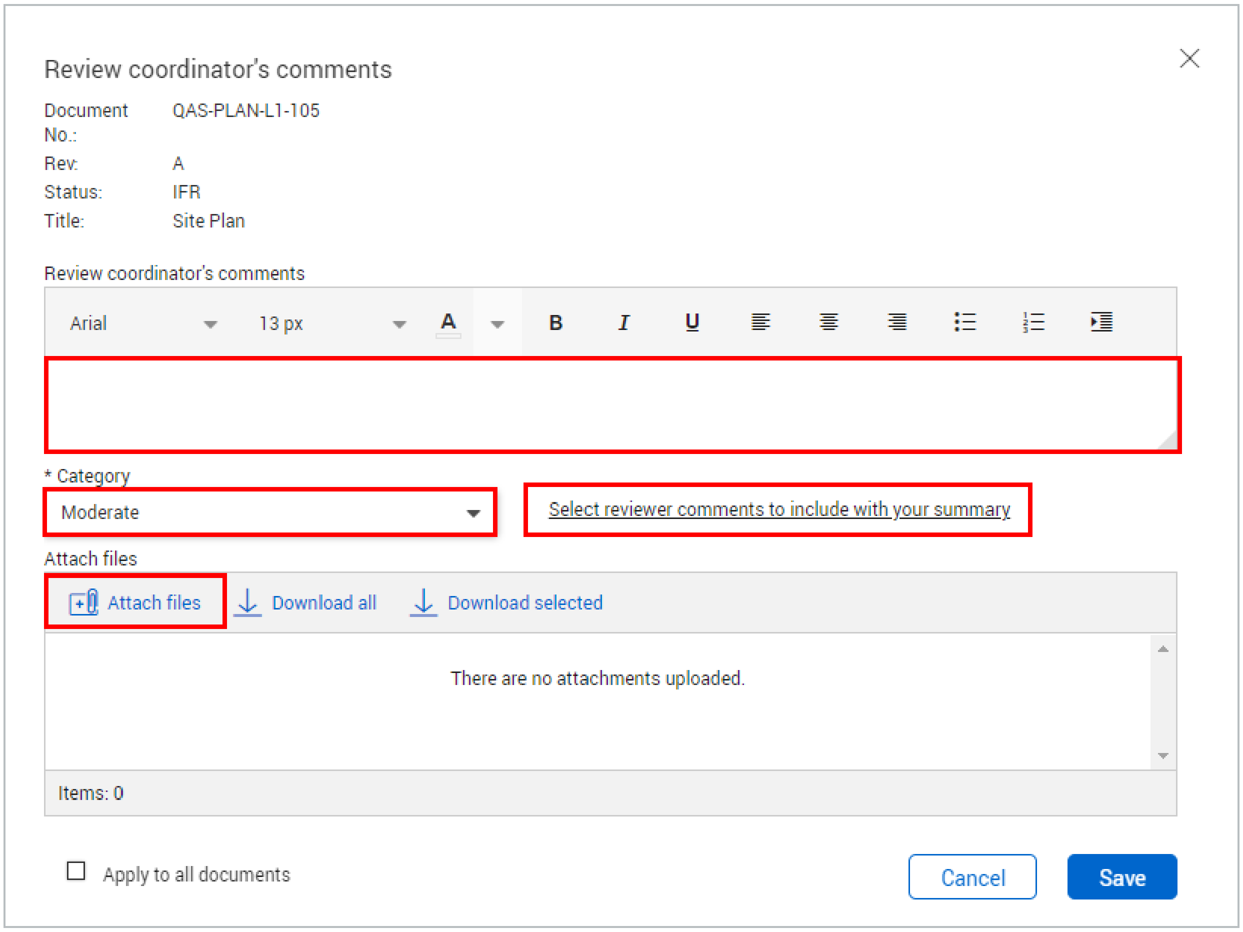
b. View reviewer comments and annotations. Select the **Close out** check box for each to close them out. Select the **Release** check box if you are ready to release the comment. The Review comments page is updated.

Alternatively, if you want to close out comments in bulk, you can click the **Closed-Out** check box in the Closed Out column header in the Review comments dialog box.

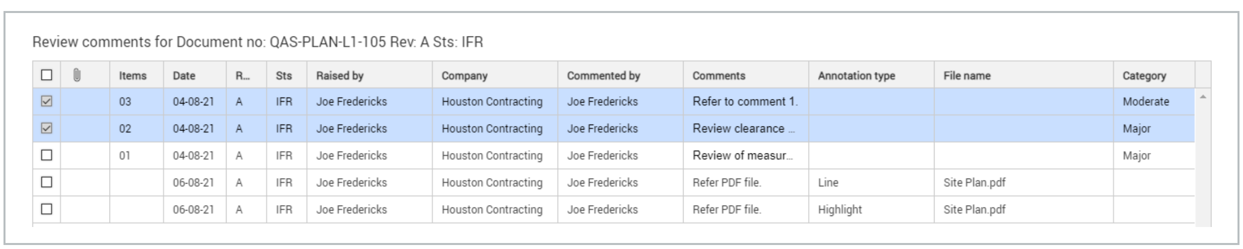


7. The Review Coordinator is also responsible for selecting any comments and/or redline mark-ups made by individual reviewers to be included in the “final comments” for the document. These are distributed back to the originator and/or to the review members.
8. Click the **Add Text** icon in the Comments column and enter reviewer comments as the review coordinator.





9. To include comments and/or redline mark-ups made by other reviewers, click the link **Select Reviewer comments to include with your summary**. Select the comments to include by ticking the boxes against them. To view any attachments, click the paper clip icon and **Download** when prompted.



Review comments for Document no: QAS-PLAN-L1-105 Rev: A Sts: IFR

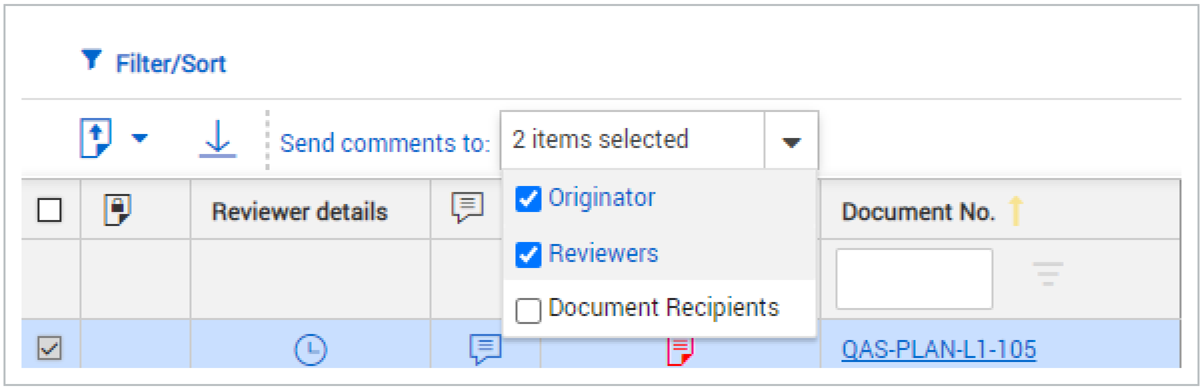
☐		Items	Date	R...	Sts	Raised by	Company	Commented by	Comments	Annotation type	File name	Category
☑		03	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer to comment 1.			Moderate
☑		02	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Review clearance ...			Major
☐		01	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Review of measur...			Major
☐			06-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Line	Site Plan.pdf	
☐			06-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Highlight	Site Plan.pdf	

10. Click **Close** when completed to return to the Review Coordinators comments window.

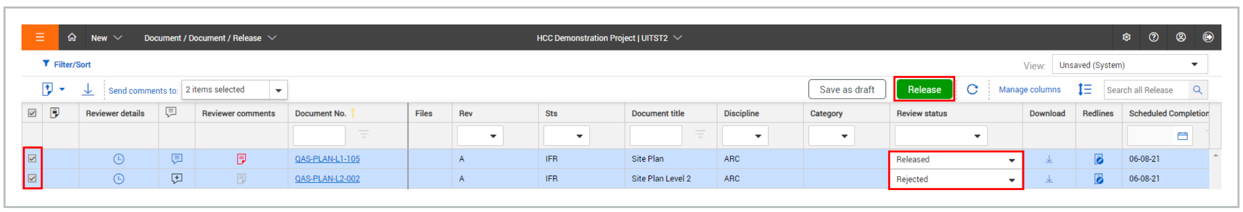
11. Use the **Attach files** button to select one or more external files to include as part of your Review Coordinators comments.

12. Select a **Category** if required.

13. Click **OK** to close the Review Coordinator's comments window.
14. From the Release screen, select who the review comments should be sent to: Originator, Reviewers or Document Recipients.



15. To release the documents where the above steps have been completed ([ensure a release status has been set]()), click **Release.**.



Reviewers and review coordinators can download the original file with all markups prior to consolidation after the document is released.

NOTE

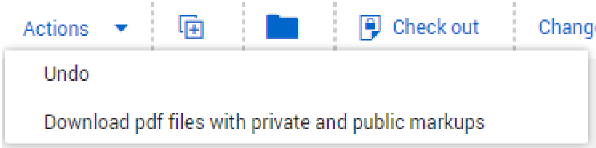
- **If the document is released:** The document is distributed automatically using email notifications.
- **If the document is rejected:** only the Originator, Review Team and Admins retain access to the document. Users from the originating company will not receive access even if they are part of the Distribution Rules / Discipline Matrix.
- The Document Register is updated with the Review Status applied.
- With the option enabled, at the Release screen the review coordinator can attach an additional View file to the document. To add an additional view file, click **Add Files** and select a view file to be added to the document.
- Use the **Review Details** link to review a history of who reviewed the document and when.
- Comments and/or Redline layers applied directly by the Review Coordinator and other reviewers selected by the Review Coordinator as part of the release process become public comments. These are visible after the document has been released via the Document Register. The other comments are private, and are not visible to users.
- The review coordinator can change private comments to public after the document has been released. See 5.14 Step by Step 2 — Change private comments to public on page 165.
- InEight Document can be configured to automatically stamp an approval signature, date and status into an image of the document (normally a Tiff file) so that the approved document when printed always contains this information. (Contact InEight for information on QPRINT if this is of interest. Charges apply).
- A reviewed and released document can be resubmitted for review without changing the Status or Revision. Go to **More**, then **Resubmit for Review** in the Document Register.

5.14 STEP BY STEP 1 – DOWNLOAD PRIOR TO CONSOLIDATION

Some projects require the ability to download or export each document that contains all review comments and markups made during the review workflow but prior to the consolidation of the markups and comments and subsequent release of the document.

This option is available in the PDF viewer only and is only supported with Adobe.

1. From the PDF viewer, expand the **Actions** menu, and then select **Download pdf files with private and public markups**.



The PDF files are provided in a zip file.

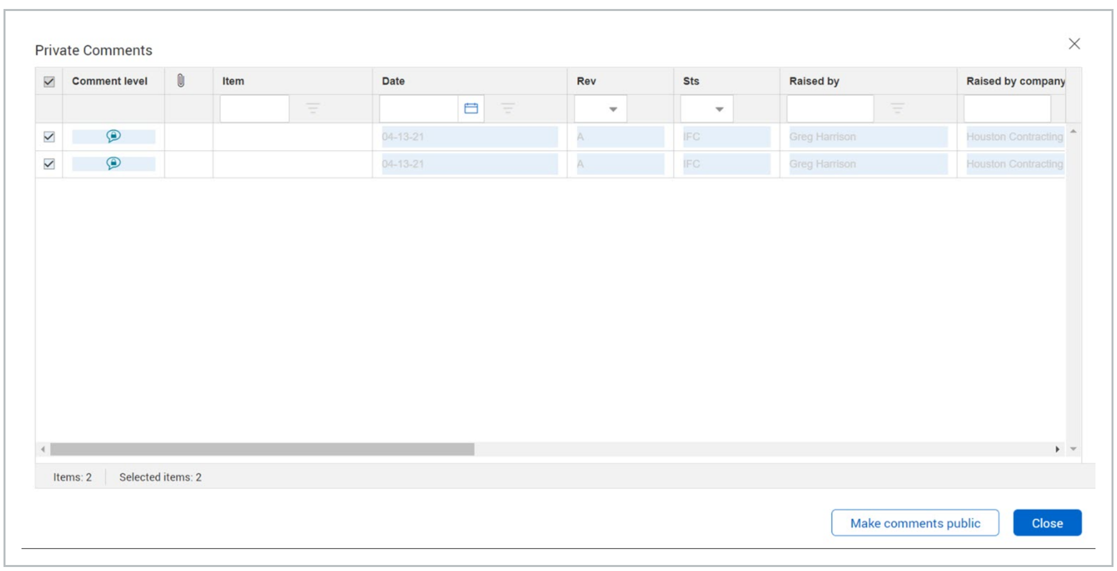
2. Extract the zip file.
3. Open thePDF file.

5.14 STEP BY STEP 2 – CHANGE PRIVATE COMMENTS TO PUBLIC

If you mistakenly chose to not publish a comment, you can now mark the private comments as public.

Only review coordinators and administrators can change private comments to public.

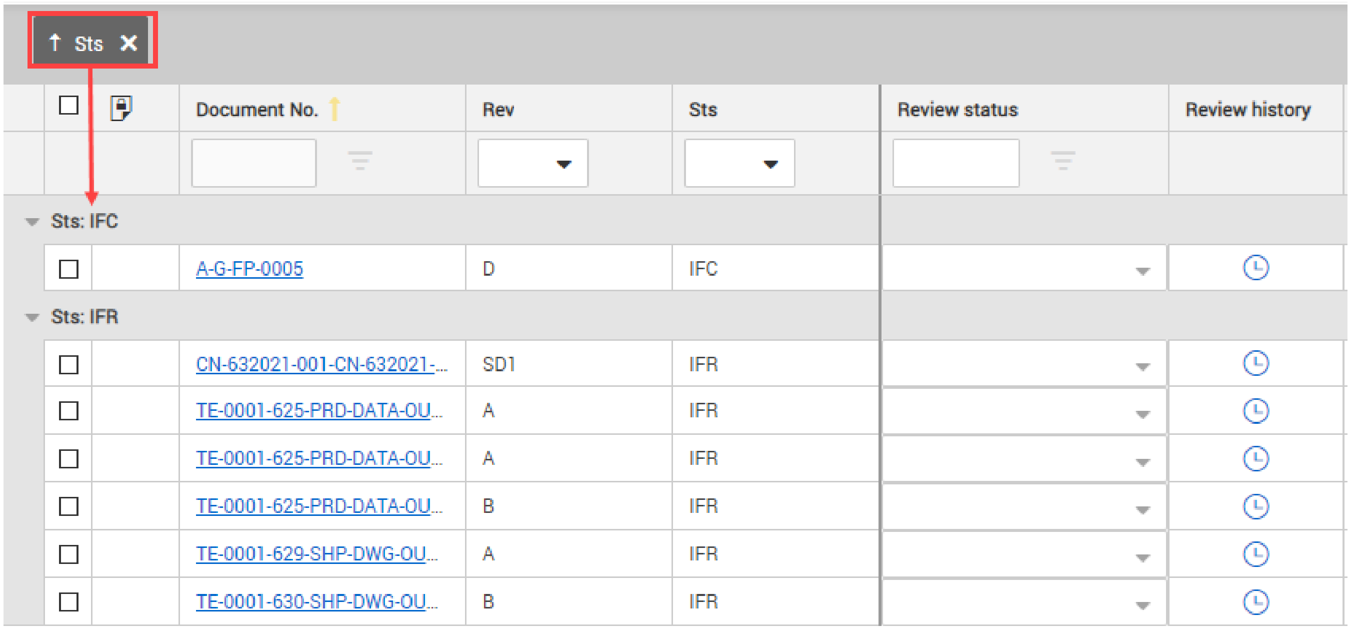
1. From the Comments tab, expand the Actions menu, and then click **View private comments** to see a list of all comments that have not been published.
2. Select the comments you want to make public, and then click **Make comments public**.



5.14.1 GROUP ITEMS IN THE DOCUMENT RELEASE REGISTER

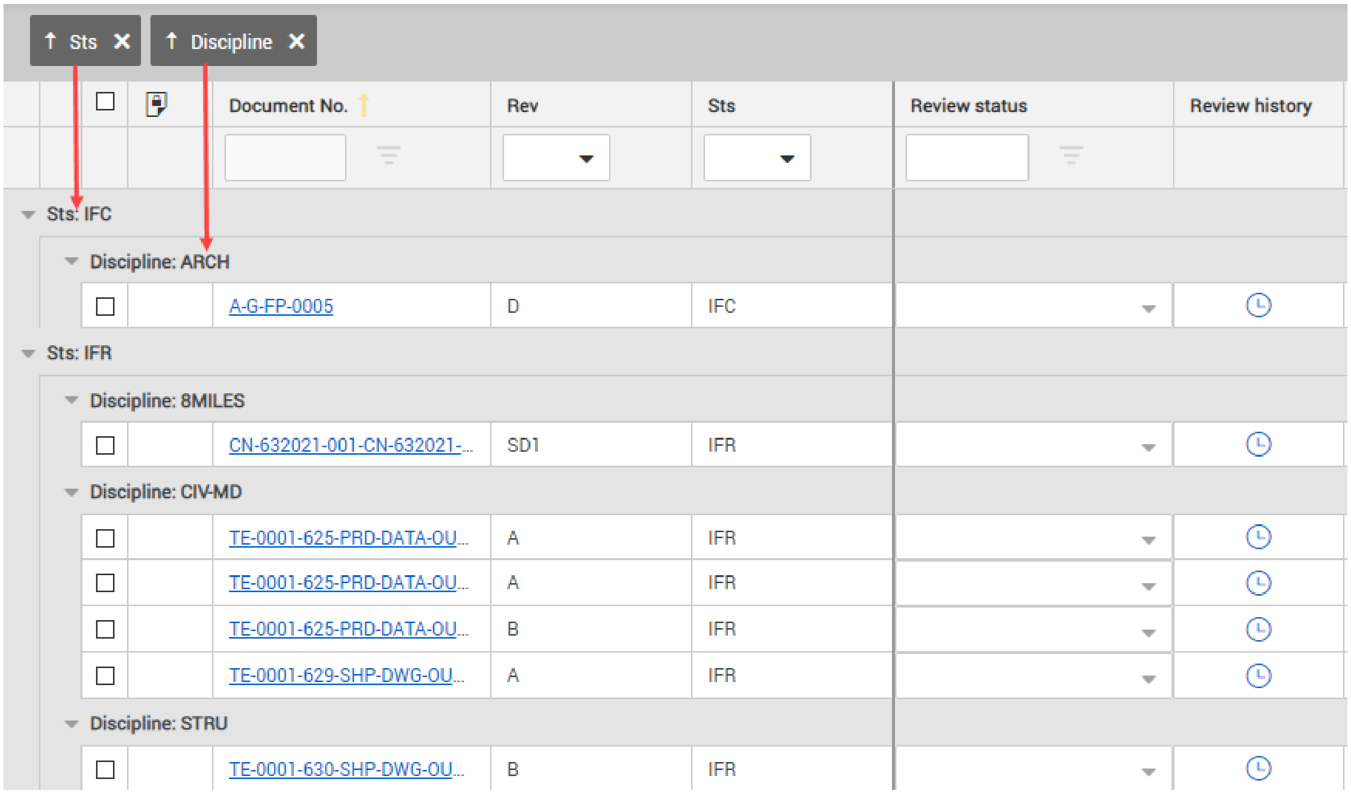
You can group entries in the Document release register by available register columns to help you quickly locate documents.

The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Sts column to the bar, the documents are grouped by status. In the image below, the documents are grouped by status in ascending order. The documents with no status would come first, followed those with IFC status and then those with IFR status.



You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the document you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The documents are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline column to the scenario above, the documents would be grouped by status and then discipline within the status.



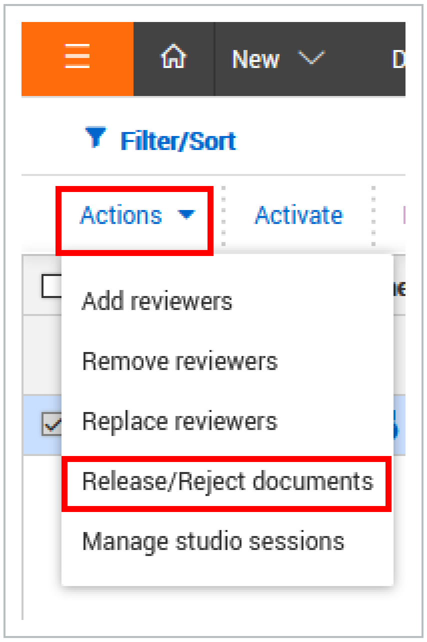
5.15 DOCUMENT RELEASE WITHOUT ACTIVATING A WORKFLOW

An option can be enabled to allow the Review Initiator assigned to a workflow to Release OR Reject a document without activating a full review workflow.

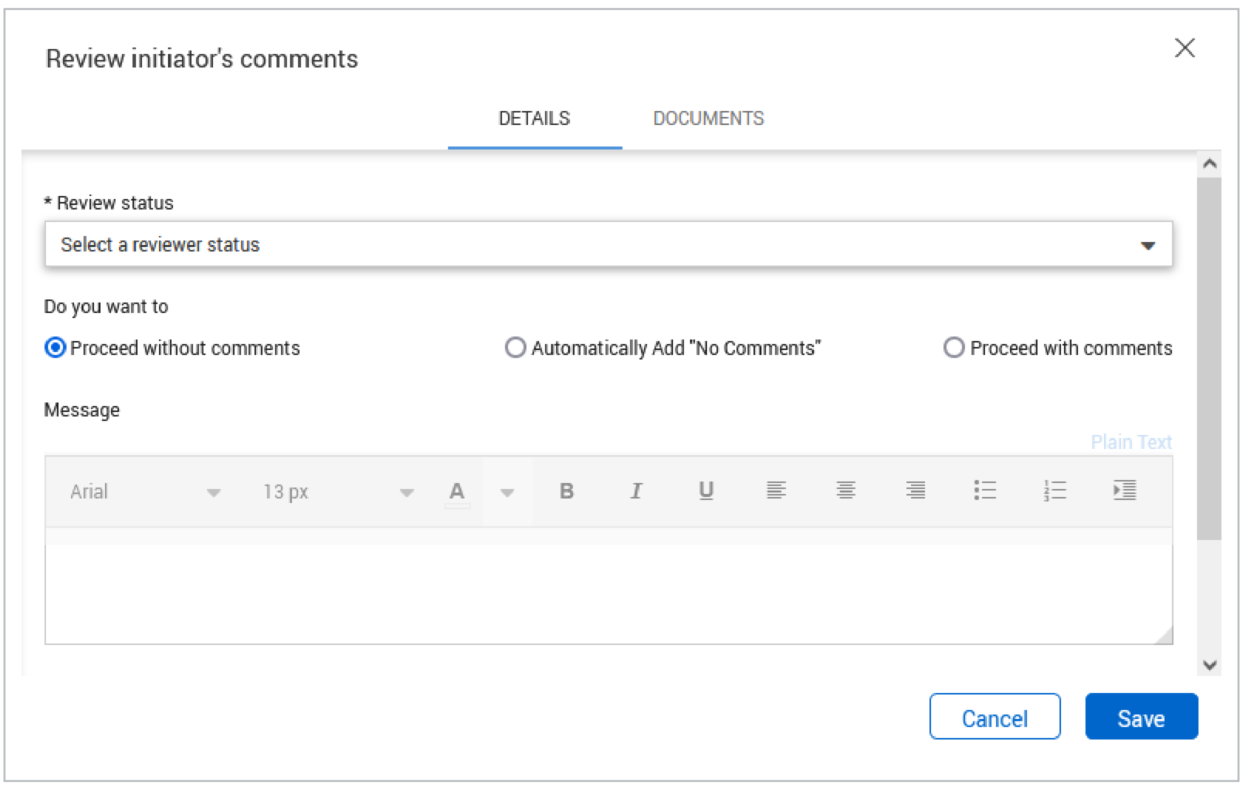
This is useful where the Review Initiator assesses the submitted document and finds that it requires it to be re-submitted. In this situation they can immediately reject the document rather than having to put it through a full workflow first.

To release/reject a document prior to it being activated for a workflow:

1. From the **Module Menu**, hover over **Documents** and select **Manage workflow**.
2. Select the Document(s) to be Released/Rejected without activating a workflow.
3. From **Actions** select **Release / Reject Documents**.



4. At the **Review Initiator Comments** window select a **Review Status** and enter a message (or select Proceed without comments).



5. Click **Save**.

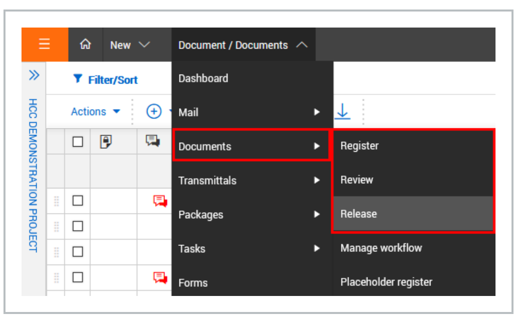
NOTE

- The Release / Reject Documents option only appears if this option is enabled at a project level.
- After being released or rejected by the Review Initiator, the documents are considered to have completed the workflow cycle and the documents will be displayed with the assigned review status in the Document Register.
- If a document is “Released” by the Review Initiator a release notification is sent to all users who have access to the document.
- If a document is “Rejected” by the Review Initiator, only the originator of the document will receive a notification.
- To view a list of documents that have been Released / Rejected by the Review Initiator use the Advanced search option and filter for Released/Rejected by equal to Review Initiator.
- The Notes column on review workflow reports shows an indicator if the document was released/rejected by the Review Initiator

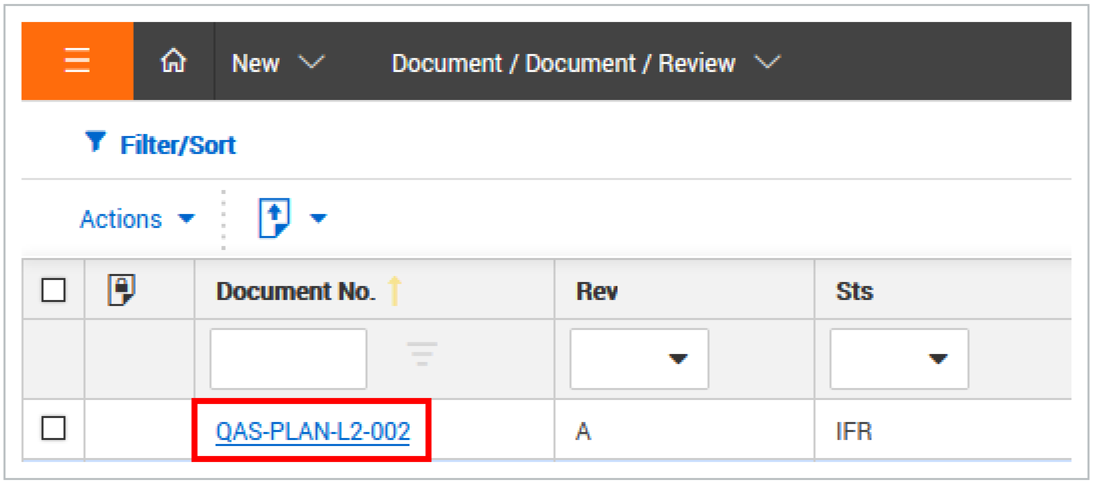
5.16 VIEW REVIEW STATUS

To view the status of a document that in a workflow process:

1. Open the**Document or Review Register.** .



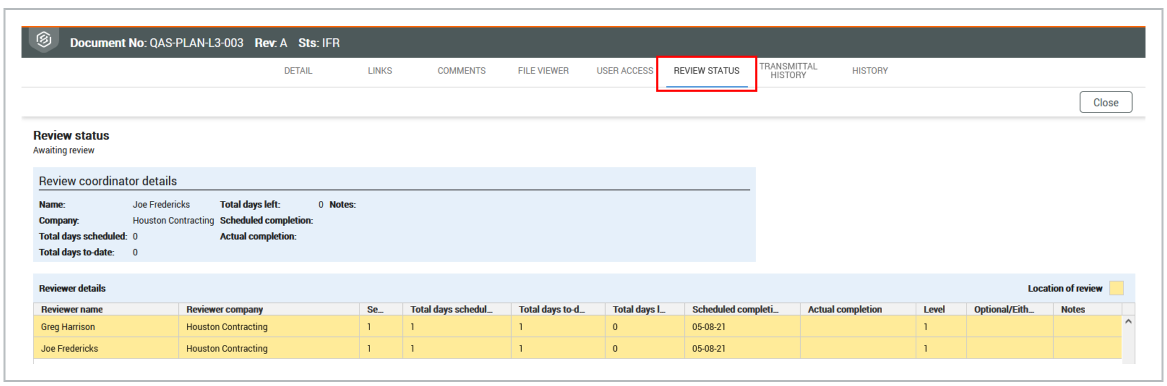
2. Click on the Document Number link to open the details screen.



3. Select the **Review Status** Tab.

   The review status tab will show:

   - The type of review that is in progress (Serial, Parallel or Single)
   - The person currently responsible for the review and their scheduled completion date.



4. A list of reviewers for the document and for each reviewer:

   - **Sequence:** the sequence the reviewer reviewed the document.
   - **Total Days Scheduled:** scheduled days for the reviewer, not the total review period for the document.
   - **Total Days to Date:** either the actual days to date since the reviewer was notified to commence their review (for incomplete reviews), or the actual days taken for the review (for completed reviews).

- **Total Days Left:** for completed reviews = 0, and for reviews in progress is the scheduled completion date less the system date in days.
- **Scheduled Completion:** calculated based on the date the reviewer was notified to start their review plus the scheduled duration. This date is empty for reviewers who have not yet been notified about the review.
- **Actual Completion:** date of review completion.
- **Optional/Either:** if the review is classified as optional or either for the reviewer.

NOTE

- This option is restricted to the Document Originator, Review Coordinator, and the Primary and Additional Project Administrators.
- If enabled, a project setting will allow anyone on the project to view this information.