

DOCUMENT DRIVE USER GUIDE

Document Drive



Release 23.12
Revision: 1
Last Updated: 31 July 2025

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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.

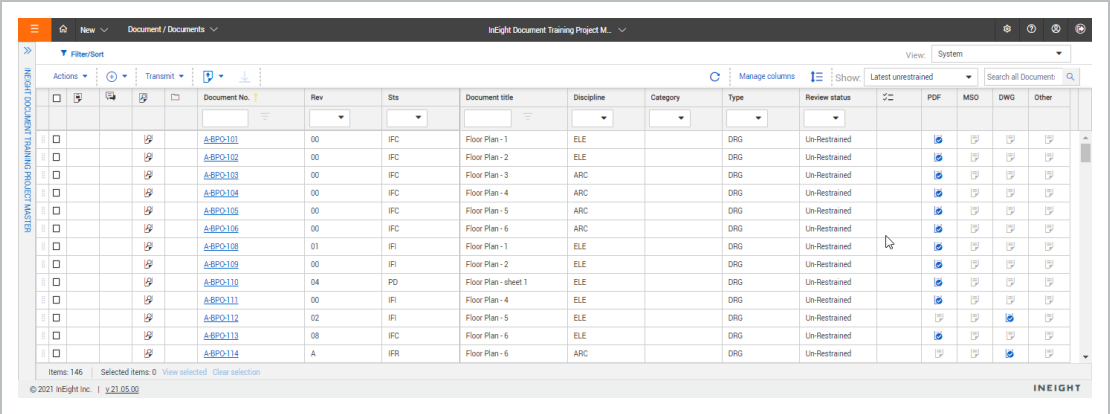
See the links below for information on common tasks you can perform from the Documents Register.

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**.



The screenshot displays the InEight Documents Register interface. At the top, there's a navigation bar with 'New', 'Document / Documents', and a project dropdown 'InEight Document Training Project M...'. Below this is a toolbar with 'Filter/Sort', 'Transmit', and 'Manage columns' (highlighted). The main area is a table with columns: Document No., Rev, Sta, Document title, Discipline, Category, Type, Review status, and a set of icons for PDF, MSO, DWG, and Other. The table lists 14 items, mostly 'Floor Plan' documents with revision numbers. A status bar at the bottom shows 'Items: 146', 'Selected items: 0', and '© 2021 inEight Inc. | v.23.05.00'.

Document No.	Rev	Sta	Document title	Discipline	Category	Type	Review status	PDF	MSO	DWG	Other
ARPC101	00	IFC	Floor Plan - 1	ELE		DRG	Un-Restrained				
ARPC102	00	IFC	Floor Plan - 2	ELE		DRG	Un-Restrained				
ARPC103	00	IFC	Floor Plan - 3	ARC		DRG	Un-Restrained				
ARPC104	00	IFC	Floor Plan - 4	ARC		DRG	Un-Restrained				
ARPC105	00	IFC	Floor Plan - 5	ARC		DRG	Un-Restrained				
ARPC106	00	IFC	Floor Plan - 6	ARC		DRG	Un-Restrained				
ARPC108	01	IFI	Floor Plan - 1	ELE		DRG	Un-Restrained				
ARPC109	00	IFI	Floor Plan - 2	ELE		DRG	Un-Restrained				
ARPC110	04	PD	Floor Plan - sheet 1	ELE		DRG	Un-Restrained				
ARPC111	00	IFI	Floor Plan - 4	ELE		DRG	Un-Restrained				
ARPC112	02	IFI	Floor Plan - 5	ELE		DRG	Un-Restrained				
ARPC113	08	IFC	Floor Plan - 6	ELE		DRG	Un-Restrained				
ARPC114	A	IFB	Floor Plan - 6	ARC		DRG	Un-Restrained				

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 discipline (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.

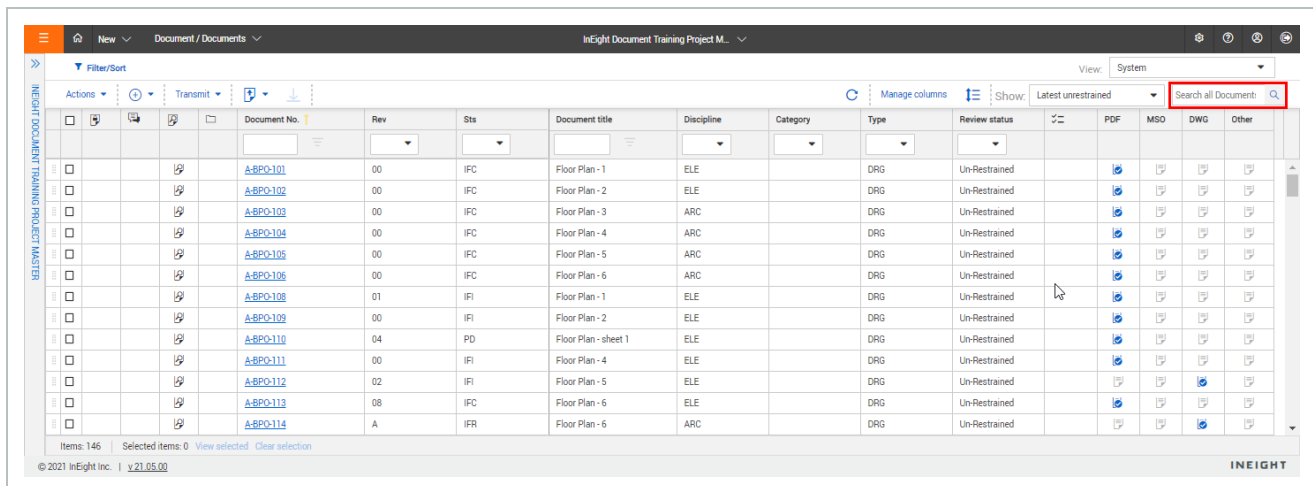
To select a document in the Register, select the document's check box on the left side of the screen. To select all documents in the register, click **Select all** at the bottom of the page. This feature is available when there are 1000 or fewer entries in the register results. The option is disabled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

Filter/Sort

×

Filter and sort

Show:

Latest unrestrained

Documents that I can downlo...

Filter by:

	Module	Column	Operator	Value [?]
+	Document	Select one...	Select one...	Select some items
+	AND	Document	Select one...	Select some items
+	AND	Document	Select one...	Select some items
+	AND	Document	Select one...	Select some items
+	AND	Document	Select one...	Select some items

Sort by:

	Column		
+	Document No	☒ Ascending order	☐ Descending order
+	THEN	☒ Ascending order	☐ Descending order
+	THEN	☒ Ascending order	☐ Descending order

Reset

Apply

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.

	Document No.	Rev	Sts	Document title	Discipline	Category	Type	Review status	PDF	MSO	DWG	Other
☐	A-BPO-101	00	IFC	Floor Plan - 1	ELE		DRG	Un-Restrained				
☐	A-BPO-102	00	IFC	Floor Plan - 2	ELE		DRG	Un-Restrained				
☐	A-BPO-103	00	IFC	Floor Plan - 3	ARC		DRG	Un-Restrained				
☐	A-BPO-104	00	IFC	Floor Plan - 4	ARC		DRG	Un-Restrained				
☐	A-BPO-105	00	IFC	Floor Plan - 5	ARC		DRG	Un-Restrained				
☐	A-BPO-106	00	IFC	Floor Plan - 6	ARC		DRG	Un-Restrained				
☐	A-BPO-108	01	IFR	Floor Plan - 1	ELE		DRG	Un-Restrained				
☐	A-BPO-109	00	IFR	Floor Plan - 2	ELE		DRG	Un-Restrained				
☐	A-BPO-110	04	PD	Floor Plan - sheet 1	ELE		DRG	Un-Restrained				
☐	A-BPO-111	00	IFR	Floor Plan - 4	ELE		DRG	Un-Restrained				
☐	A-BPO-112	02	IFR	Floor Plan - 5	ELE		DRG	Un-Restrained				
☐	A-BPO-113	08	IFC	Floor Plan - 6	ELE		DRG	Un-Restrained				
☐	A-BPO-114	A	IFR	Floor Plan - 6	ARC		DRG	Un-Restrained				

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.

	PDF	Document No.	Rev
☐			
☐		88-999	KNRV1
☐		888888888888	A
☐		ABC-003	RL-RE
☐		CATHY2019090401	J
☐		CATHY201909061-3	A
☐		NADEETEST2	J

- 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.

Document No: A-G-SCH-003 Rev C Sls: IFR

DETAIL
LINKS
COMMENTS
FILE VIEWER
USER ACCESS
TRANSMITTAL HISTORY
HISTORY

Content File names: PDF-A-G-SCH-003.CJT.pdf

Close Save

Viewing tools
Markup
Measure

Annotations

17/6/2021

Joe Fredericks
Houston Contracting

Page: 1

17/6/2021

Joe Fredericks
Houston Contracting

Page: 1

Material Report for price: Autohide
Page 1 of 5

Display Date: Parallel Display
Wednesday, November 01, 2020 10:27 AM

EXISTS	BEACON	ITEM	MATERIAL	USERPARTS/ROW	DESCRIPTION	QTY	UNIT	COST	LABOR	SALES TAX	TOTAL
10000-19999 PREPARATION											
		BS-0011	Building Permits		Detail Co.	563	EACH	1.00	-	-	563.00
FEES	143-1010	BS-0010	Bldg Transportation Fee		Detail Co.	1	EACH	25.00	-	-	25.00
FEES	143-1013	BS-0010	Certificate Of Occupancy		Detail Co.	1	EACH	25.00	-	-	25.00
FEES	143-1030	BS-0010	Variance Fee(s)Bldg		HennepinCountyVariance	1	EACH	450.00	-	-	450.00
FEES	143-101	BS-0010	Architectural Fee		Design Modifications	1	EACH	450.00	-	-	450.00
ENGR	143-1102	BS-0031	Engineering (Sml)		Imp Pkg of Planning	1	EACH	75.00	-	-	75.00
BURV-S	143-1110	BS-0001	Blueprints		Comm & Office Set	1	EACH	175.00	-	-	175.00
BURV-S	143-1100	BS-0048	Survey (Stake Footings)		Locate Home on Lot	1	EACH	375.00	-	-	375.00
BURV-L	143-1100	BS-0048	Survey (Final Plat)		Plot for Closing	1	EACH	375.00	-	-	375.00
FOUNAL	143-1205	SITE-04-003-6	Geo Tex Drive		GeoTex0002	1	ROLL	40.00	20.00	-	60.00
GRV-L	143-1225	SITE-04-001-4	Gravel Driveway		#4Crushed Stone	9	TON	12.63	-	7.05	121.62
GRADAR	143-1230	BS-0102-R	Grading Rough		Clear & Grade Lot	1	EACH	600.00	-	-	600.00
UTL-C	143-1410	BS-0075	Temporary Easement		Connect to PortHalls	1	EACH	50.00	-	-	50.00
FEES	143-1400	BS-0070	Water Service (Permit)		Detail Co.	1	EACH	850.00	-	-	850.00
FEES	143-1410	BS-0070	Water Service (Permit)		Detail Co.	1	EACH	850.00	-	-	850.00
FEES	143-1510	BS-0000	Constr Period Interest		3 Month Advance	1	EACH	1800.00	-	-	1800.00
FEES	143-1520	BS-0000	Design Fees & Costs		Construction Loan	1	EACH	1900.00	-	-	1900.00
FEES	143-1530	BS-0000	Approved Const Loan		Construction Loan	1	EACH	200.00	-	-	200.00
FEES	143-1540	BS-0000	Plans During Const		Property Taxes	1	EACH	150.00	-	-	150.00
FEES	143-1600	BS-0000	Building Risk Insurance		General Liability	1	EACH	200.00	-	-	200.00
SUBTOTAL											8444.62
20000-29999 E/F FOUNDATION											
GRAD-B	143-2000	BS-0102-B	Backfill		Stabilize or Bermed Wall	1	EACH	100.00	-	-	100.00
FOUNAL	143-2010	MET-03-000-10	Vibro Tach (Slab)		SEI05092	2	ROLL	0.98	-	-	0.12
FOUNP	143-2015	MET-03-000-10	Rebar								



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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.

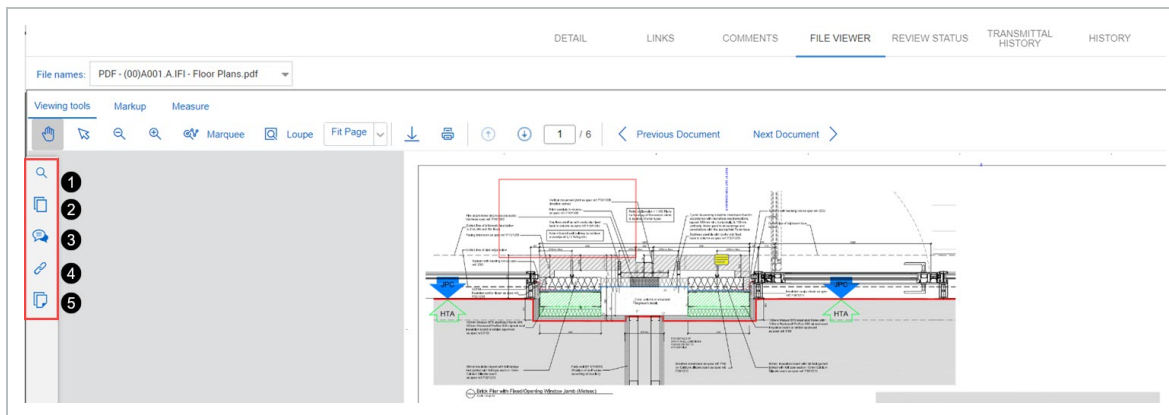
[Download PDF Viewer Quick Guide](#)

1.5 PDF VIEWER TOOLBARS

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

1.5.1 ORGANIZATION TOOLS

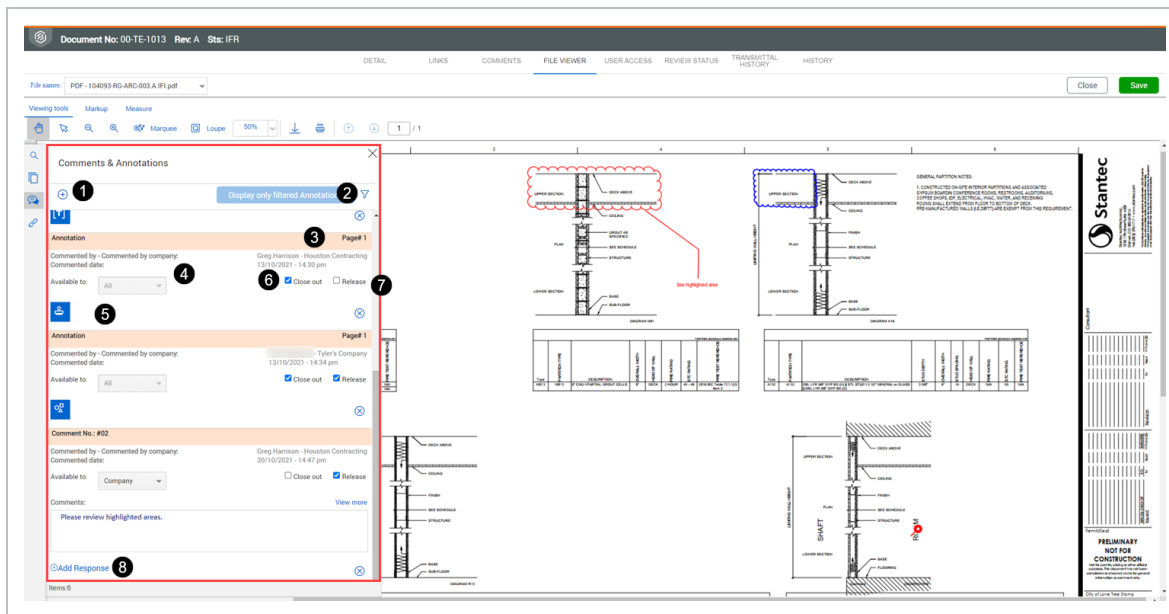
The left side toolbar gives you tools to help you keep track of the annotations, comments, and links. You can also search for text or view thumbnails of the PDF. The toolbar is shown on all tabs of the PDF viewer.



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.

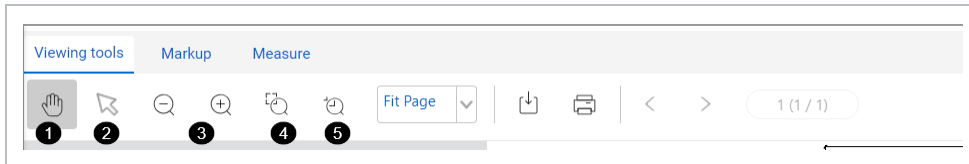


Item number	Name	Use
1	New Comment	Lets you add a new comment to the document.
2	Filter	Lets you filter and sort comments and annotations in the list. You can filter by module, such as Mail or Transmittals, and some high-level data in the module. When you filter annotations, the filtering is also applied 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

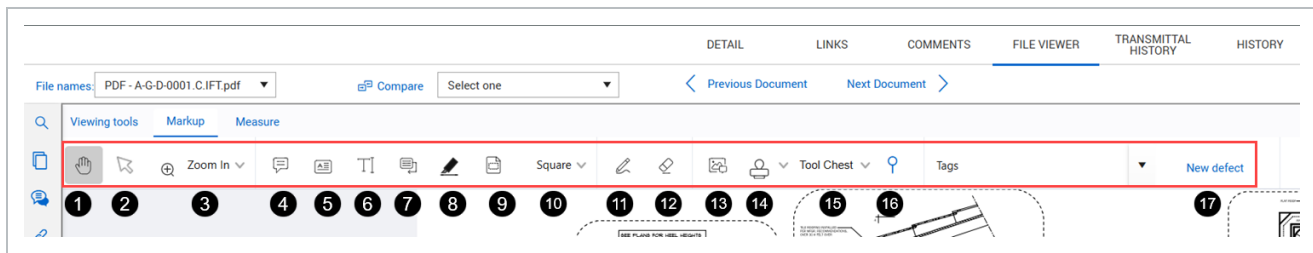
The tools in the Viewing tools tab toolbar let you customize how you view the PDF.



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.

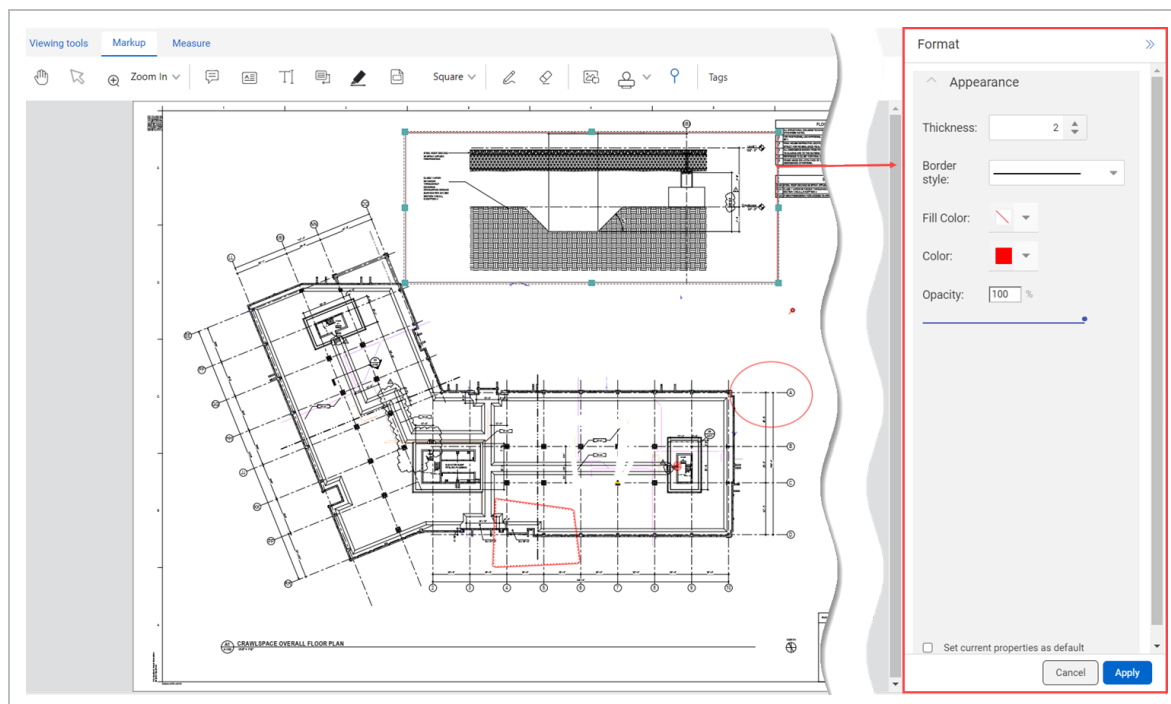
Item number	Name	Use
13	Image	Insert a saved image.
14	Stamp	Add a stamp, such as one that shows approval or rejection.
15	Tool chest	Insert or manage custom annotations.
16	Pin	Place a marker (pin) to an area of the PDF page.
17	New defect	Pin a defect to the drawing.

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.

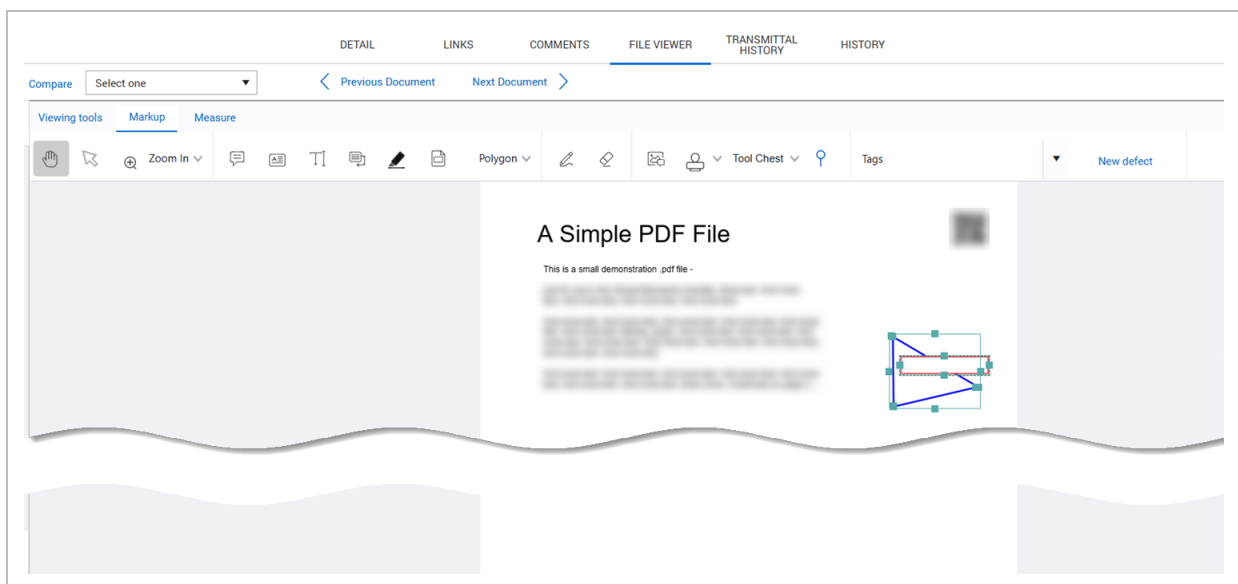
If you have requested a new stamp via a customization, it is automatically added to the tool chest.

CREATE A CUSTOM ANNOTATION FOR THE TOOL CHEST

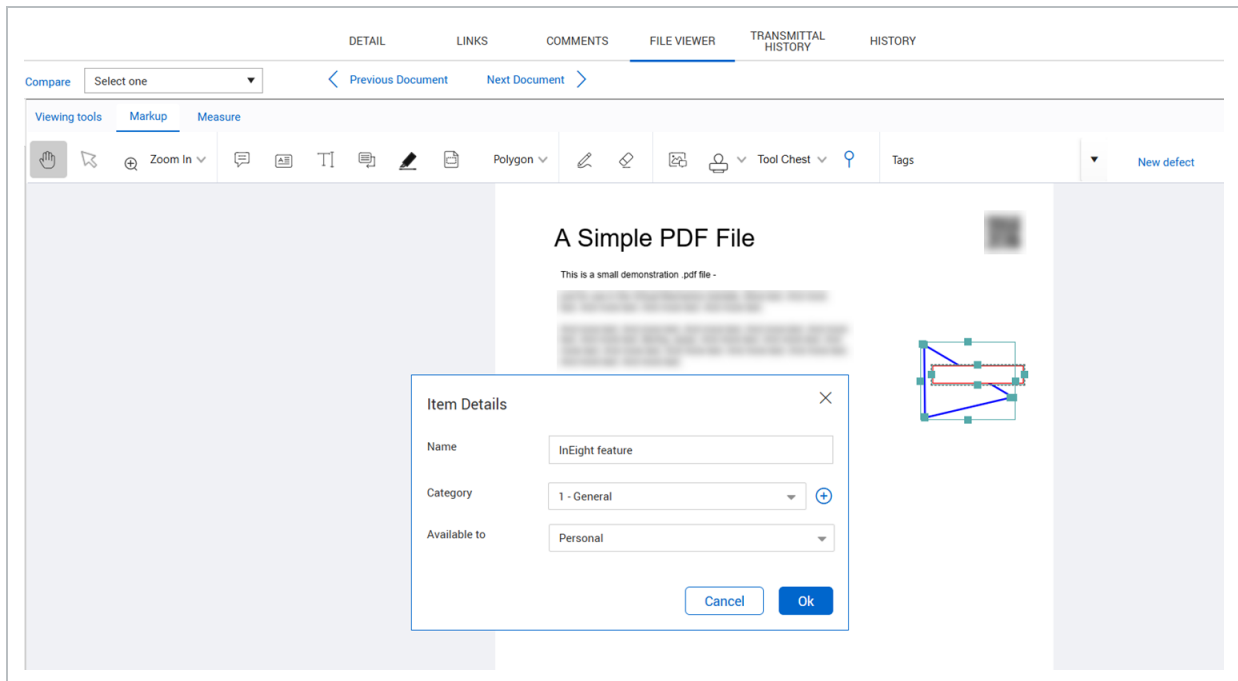
Summary: Create a custom annotation and add it to the tool chest when you frequently group multiple markups together, and you want to save them as a single annotation for future use. You can also use the tool chest when you want to save the formatting for a single annotation, such as a font or color, 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.

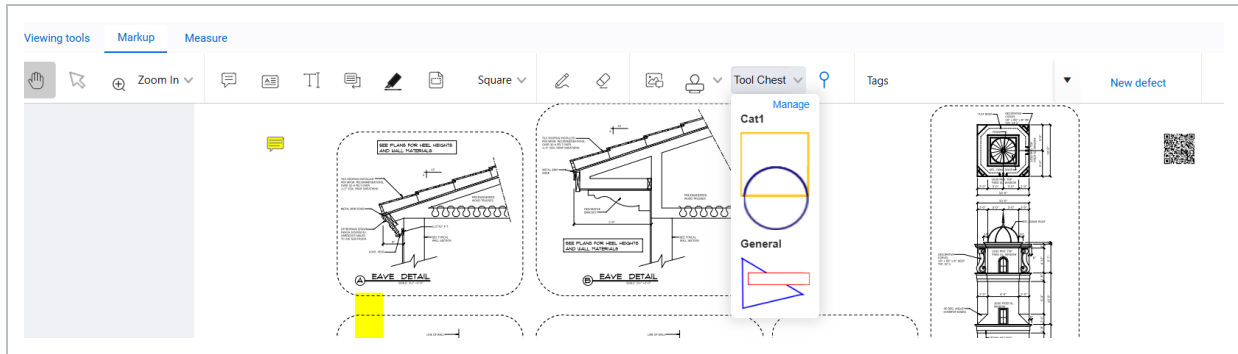
What's next: You can open the tool chest and select your annotation instead of having to recreate it. If you saved the tool with Company or Project availability, the annotation is available in other users' tool chests.

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.

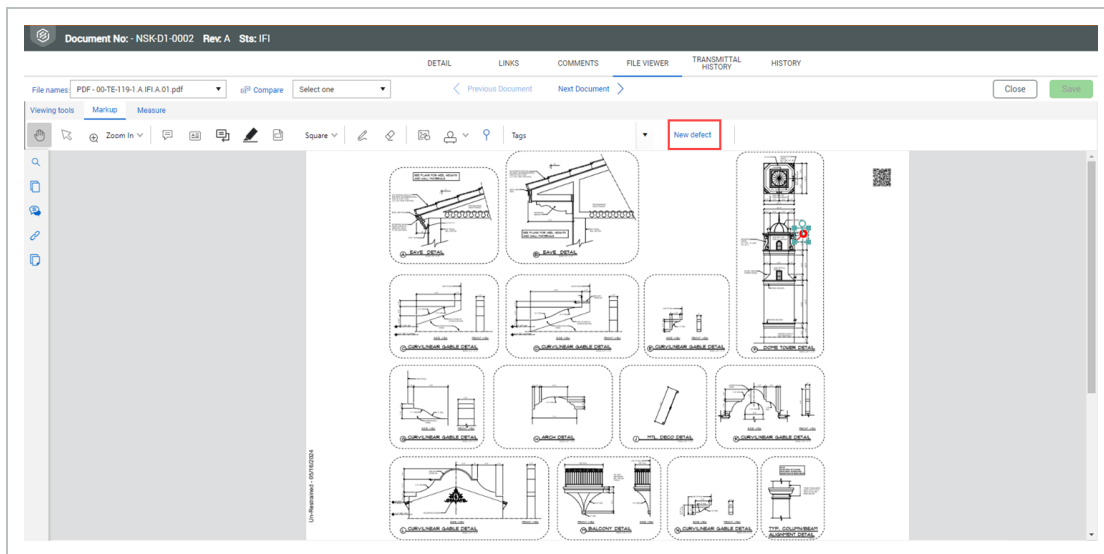
PIN A DEFECT TO A DRAWING

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.

New Defect

DETAILS

Cancel Save

Details

* Inspection Company: Houston Contracting

* Inspector: Mandy Becker

* Inspectionname: Select a Inspectionname

BUILDname: Select a BUILDname

AREA12name: Select a AREA12name

LOCATION: Select a LOCATION

ROOM: Select a ROOM

ITEM12: Select a ITEM12

SUB12: Select a SUB12

DEFECT12: Select a DEFECT12

Verification

* Passed: No

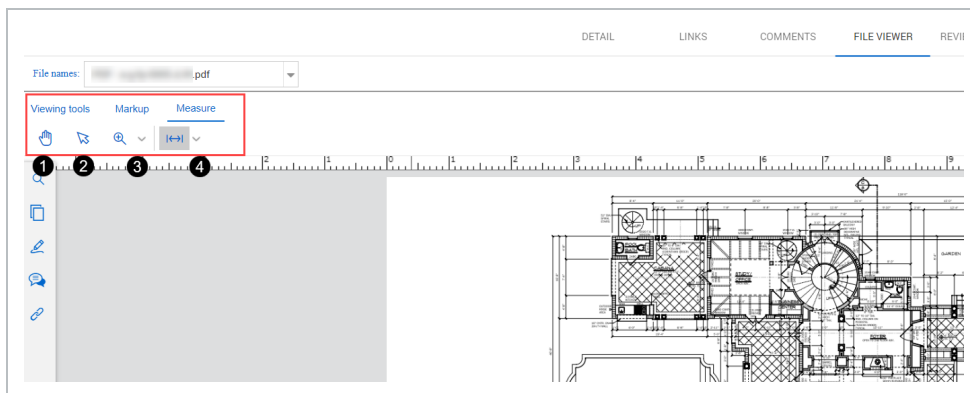
☐ Complete

- 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.

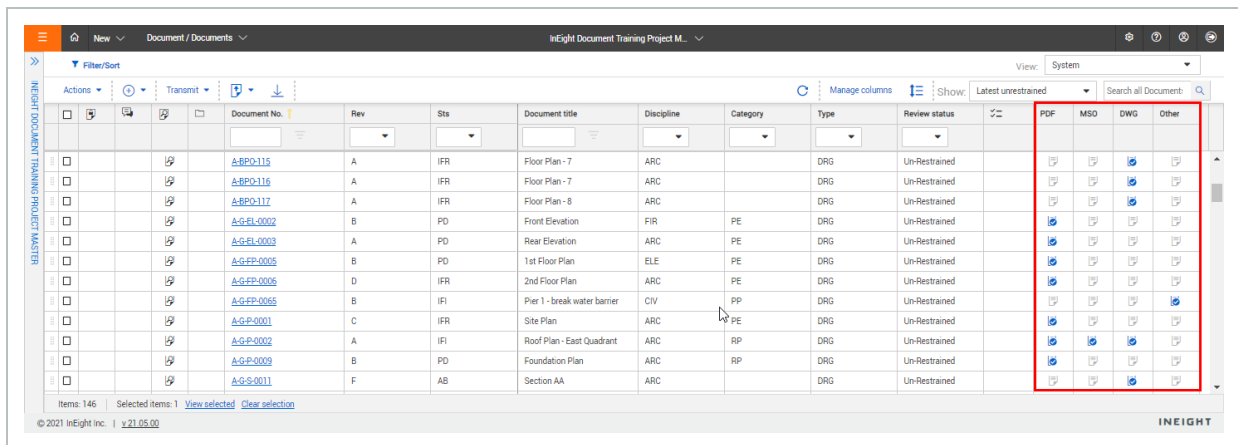
1.7 DOWNLOADING RELEASED DOCUMENTS

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.



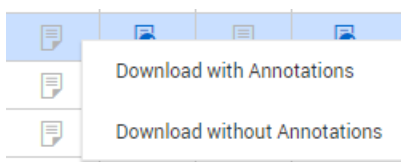
2. If the document is a PDF, a menu shows with options to download with or without annotations. Choose **Download without Annotations**. If the document is not a PDF, the option is not shown.
3. If a download disclaimer appears, click **Agree**.
4. Click **Download** to save the file to your computer.

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.



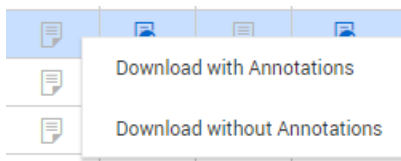
2. Click **Download with Annotations**. PDF files are provided in a zip file.
3. Extract the zip file.
4. Open the PDF file.

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.



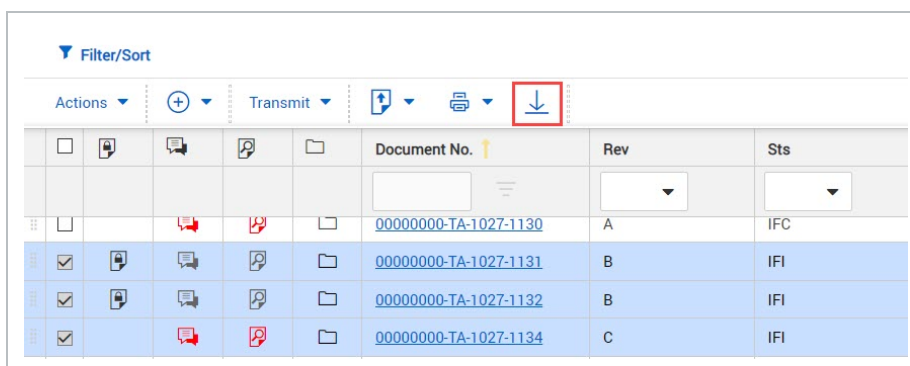
2. Click **Download with Annotations**. PDFfiles are provided in a zip file.
3. Extract the zip file.
4. Open the PDF in Bluebeam.

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

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

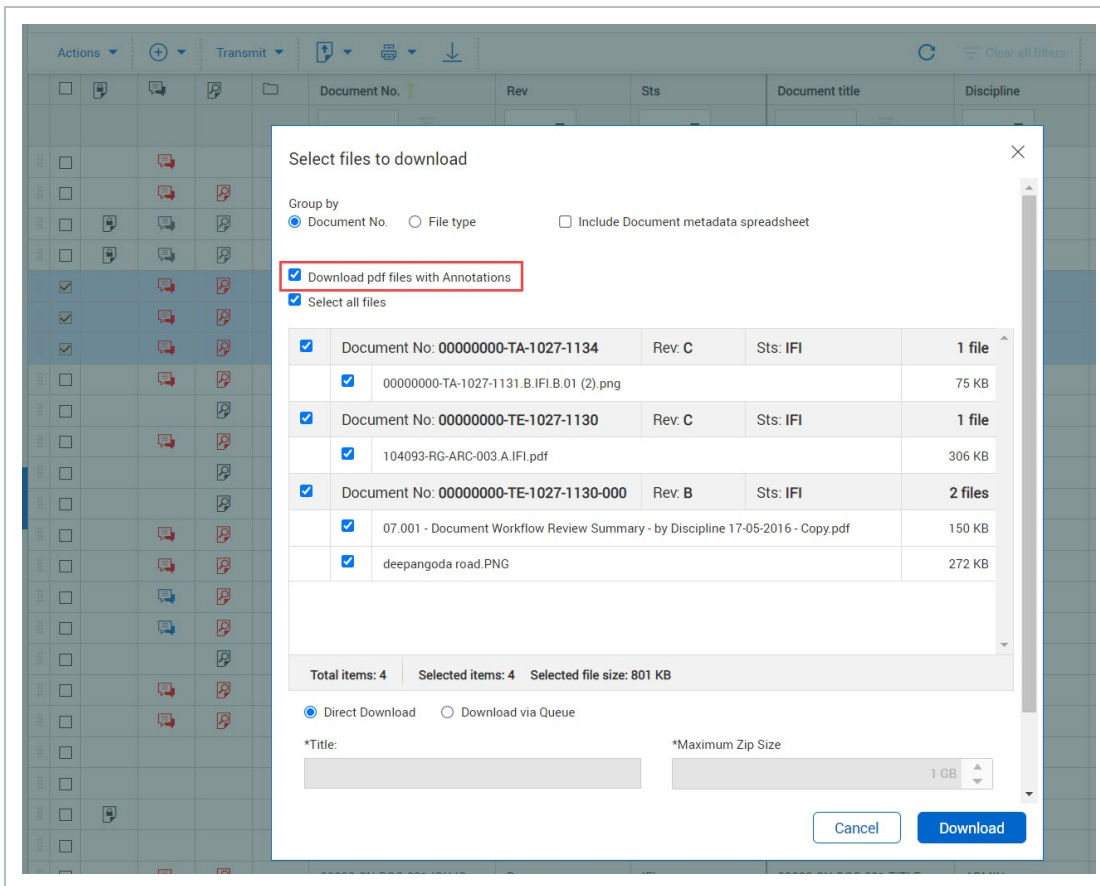
The option is available in the PDF viewer only.

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.



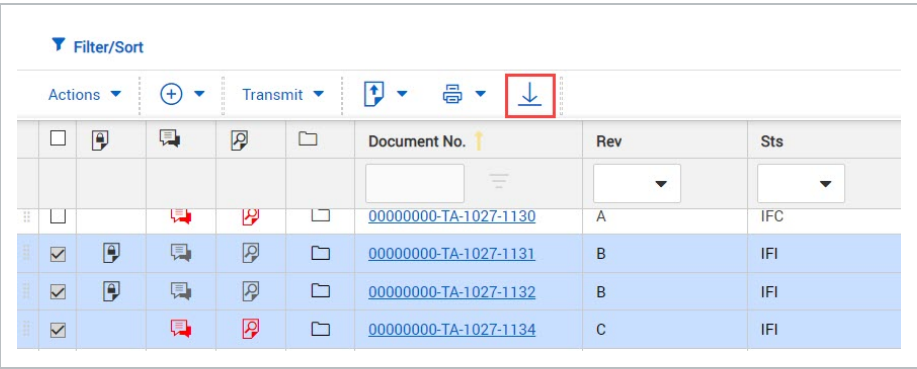
3. Extract the zip file.
4. Open the PDF file.

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

You can download PDFs with annotations in bulk with Bluebeam.

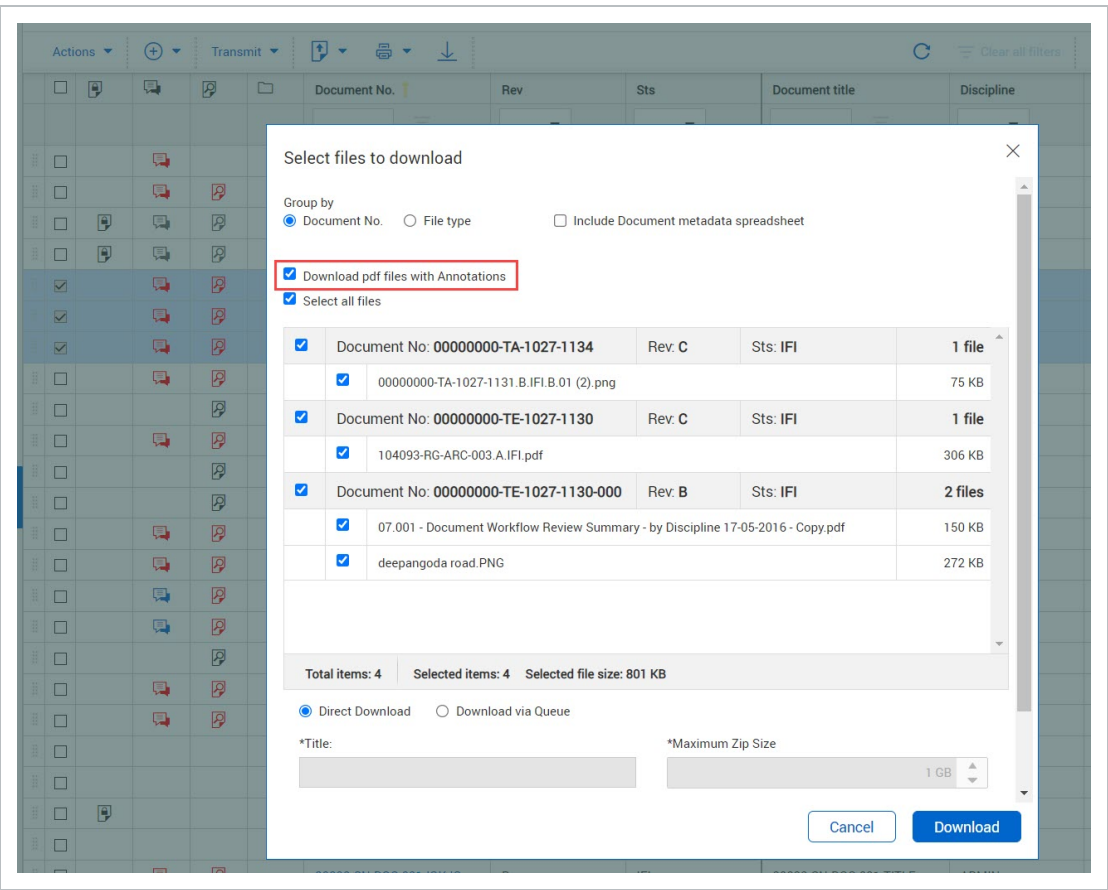
The option is available in the PDF viewer only.

- 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

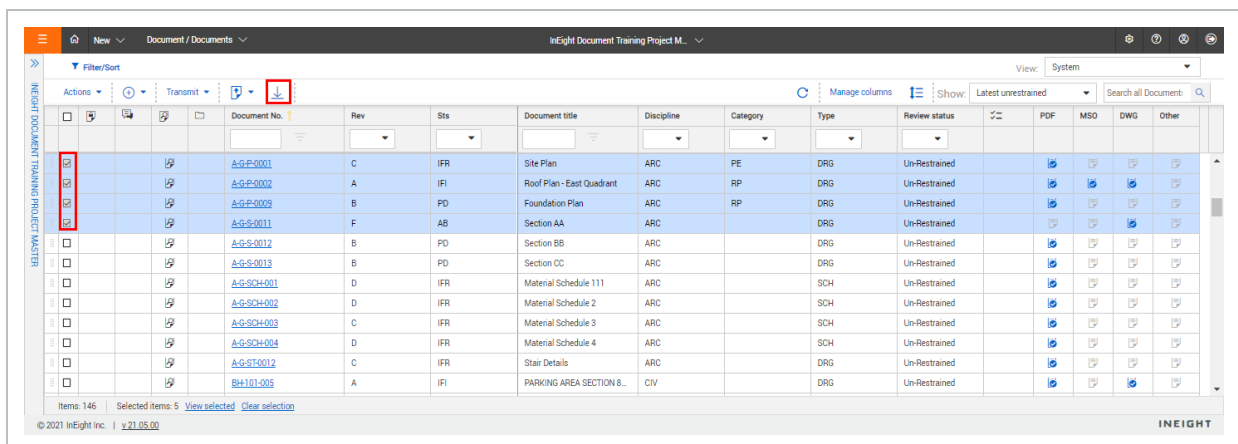
Easily download lots of documents using the bulk download feature. You can download documents directly or download from a queue.

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.

Select files to download

Group by
☒ Document No. ☐ File type

☐ Include Document metadata spreadsheet

☒ Select all files

	Document No: 00000000-TE-1027-1130	Rev. B	Sts: IFI	3 files
☒	TS-10032015-RESTD0C-02.A.IFI.doc			962 KB
☒	TS-25062015-RESTD0C-04.TSRE1.IFC.plt			82 KB
☒	New Text Document.txt			1 KB
☒	Document No: 00000000-TE-1027-1130-000011	Rev. B	Sts: IFI	1 file
☒	TS-06052015-UNRESTDOC-05.TSRE1.TSUN1.pdf			103 KB

Total items: 4 Selected items: 4 Selected file size: 2 MB

☒ Direct Download ☐ Download via Queue

*Title: *Maximum Zip Size:

☐ Password protect the downloaded zip file

Cancel Download

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.

Select files to download

Group by
☒ Document No. ☐ File type

☐ Include Document metadata spreadsheet

☒ Select all files

☒	Document No: 00000000-TE-1027-1130	Rev: B	Sts: IFI	3 files
☒	TS-10032015-RESTDOC-02.A.IFI.doc			962 KB
☒	TS-25062015-RESTDOC-04.TSRE1.IFC.plt			82 KB
☒	New Text Document.txt			1 KB
☒	Document No: 00000000-TE-1027-1130-0000 11	Rev: B	Sts: IFI	1 file
☒	TS-06052015-UNRESTDOC-05.TSRE1.TSUN1.pdf			103 KB
☒	Document No: 000000-TIS-DOC-0003	Rev: B	Sts: IFI	2 files
☒	07.001 - Document Workflow Review Summary - by Discipline 17-05-2016.pdf			150 KB
☒	deepangoda road.PNG			272 KB

Total items: 156 Selected items: 156 Selected file size: 281 MB

☐ Direct Download ☒ Download via Queue

*Title: *Maximum Zip Size:

☐ Password protect the downloaded zip file

Cancel Download

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.

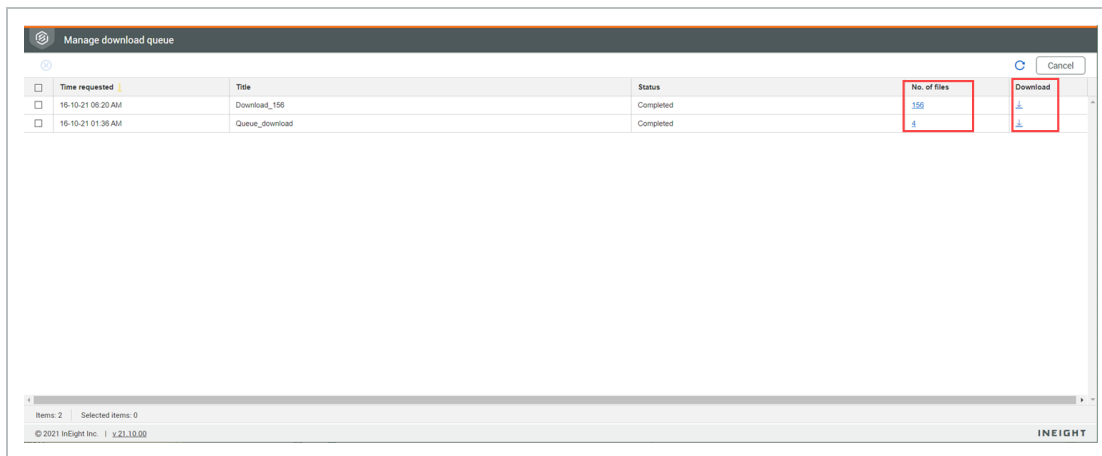
You can then download the documents from the queue to your workstation.

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

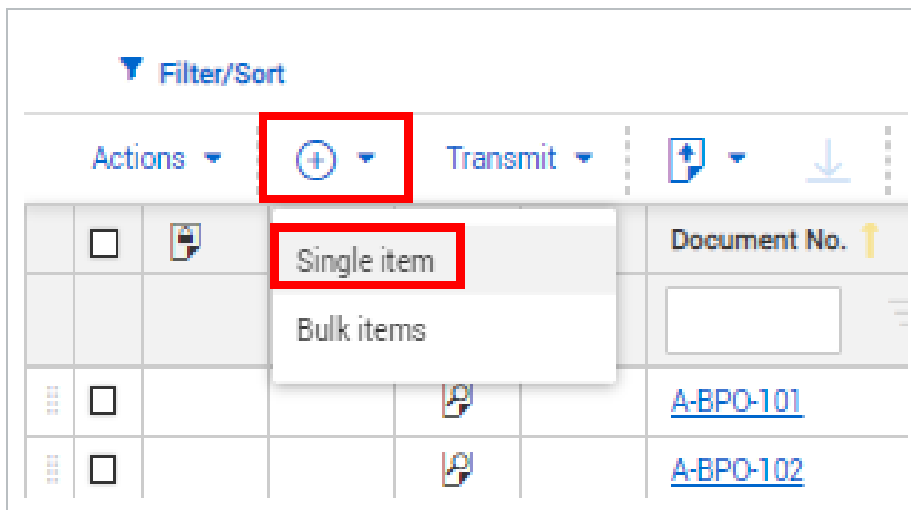
Upload documents to the Documents Register to manage and perform actions on them.

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.

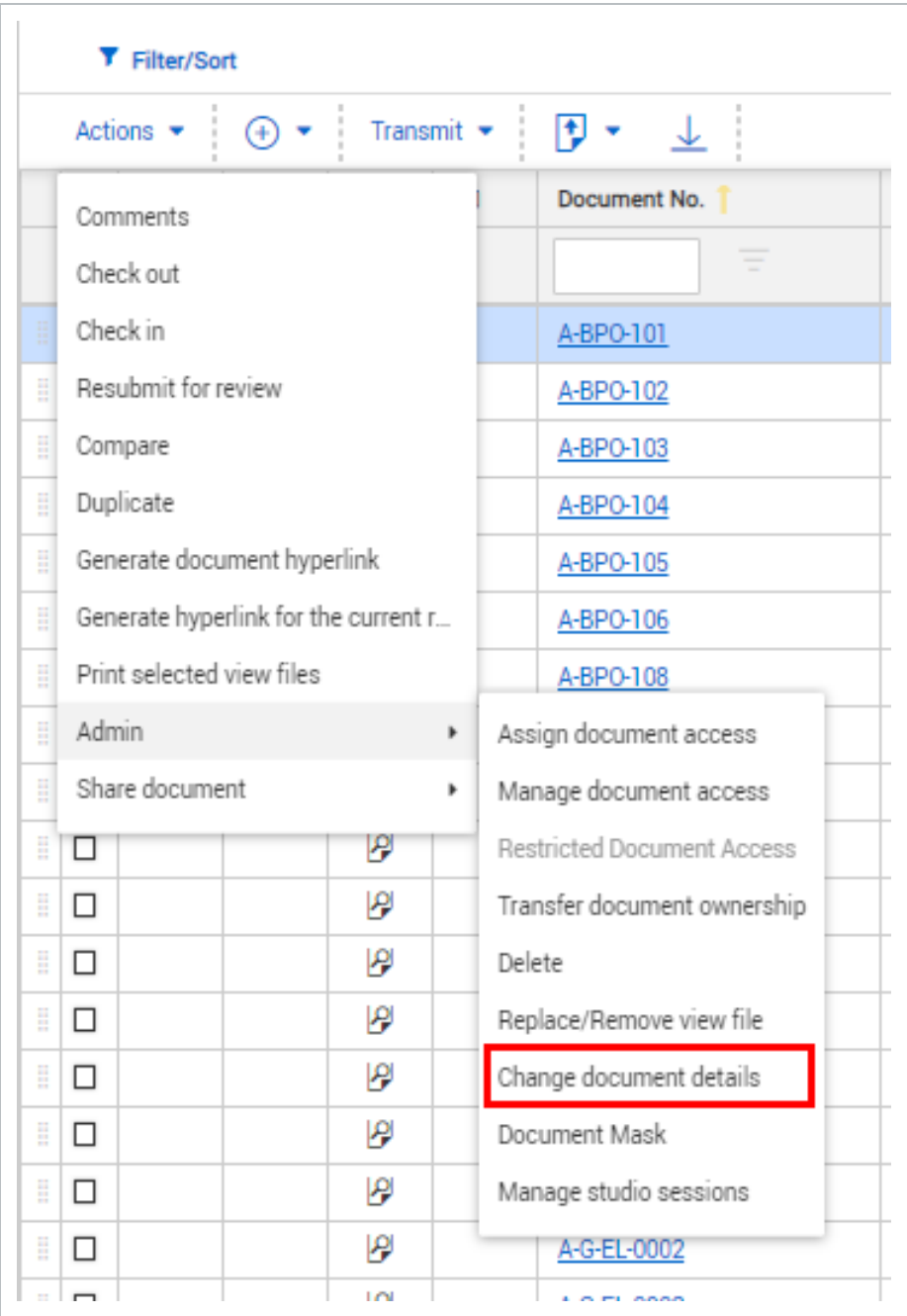
When the OCR process completes, the document view file is replaced with the new version, and a corresponding entry is created in the Document History.

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.


Change document details

DETAIL

Actions





Check out

Change document details

Cancel

Save

* Document No. ⓘ

A-BPO-101

* Title

Floor Plan - 1

* Revision

00 - Rev 00

* Status

IFC - Issued for Construction

* Discipline

ELE - Electrical

* Type

DRG - Drawing

Category

Select one

From

Jacob Palmer, Colt Contracting

Review status

Un-Restrained

Date recorded

14-12-2020

Date released

14-12-2020

Area

Select one

Revision notes

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INEIGHT

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.

- 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).

The screenshot displays the InEight document management interface. The top header shows the document number 'SB735F-25T-G', revision 'Rev. 02', and status 'Sta: IFR'. Below the header are tabs for 'DETAIL', 'LINKS', 'COMMENTS', 'FILE VIEWER', 'USER ACCESS', 'REVIEW STATUS', 'TRANSMITTAL HISTORY', and 'HISTORY'. The 'DETAIL' tab is active. On the left, there is a sidebar with an 'Attach files' button highlighted by a red box. The main area shows a form for document details, including fields for 'Document No.', 'Title', 'Revision' (set to '02 - Rev 02'), 'Status' (set to 'IFR - Issued for Review'), 'Discipline' (set to 'STR - Structural (Main Review)'), 'Type' (set to 'DRG - Drawing'), and 'Category' (set to 'Select one'). There are also fields for 'From' (John Smith, Houston Contracting), 'Review status' (Released), 'Date recorded' (29-10-2020), 'Date released' (29-10-2020), 'Area' (Select one), 'Revision notes', and 'Remarks'. The bottom of the interface shows the copyright '© 2021 InEight Inc. | v21.05.00' and the InEight logo.

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).

The screenshot displays the 'Change document details' form for document SB735F-25T-G, Rev. 02. The interface includes a top navigation bar with tabs for DETAIL, LINKS, COMMENTS, FILE VIEWER, USER ACCESS, REVIEW STATUS, TRANSMITTAL HISTORY, and HISTORY. The left sidebar shows a 'Files' section with a message 'No file has been selected. Please select a file to preview.' and an 'Attach files' button highlighted with a red box. The main form contains the following fields:

- * Document No.: SB735F-25T-G
- * Title: 2 1/2" Square Slip Base Top / Plate
- * Revision: 02 - Rev 02 (highlighted with a red box)
- * Status: IFR - Issued for Review
- * Discipline: STR - Structural (Man Review)
- * Type: DRG - Drawing
- Category: Select one
- From: John Smith, Houston Contracting
- Review status: Released
- Date recorded: 29-10-2020
- Date released: 29-10-2020
- Area: Select one
- Revision notes: (empty text area)
- Remarks: (empty text area)

At the bottom left, the footer reads '© 2021 InEight Inc. | v 21.05.00'. At the bottom right, the InEight logo is visible.

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.

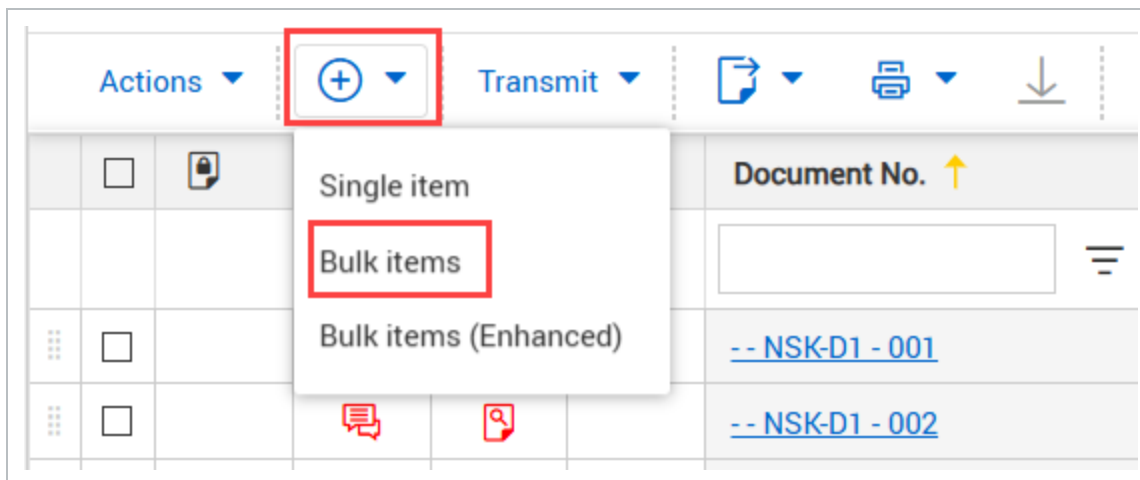
Select the **Superseded revision** check box if you want to upload previous revisions of the files.

UPLOAD DOCUMENTS IN BULK (STANDARD)

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

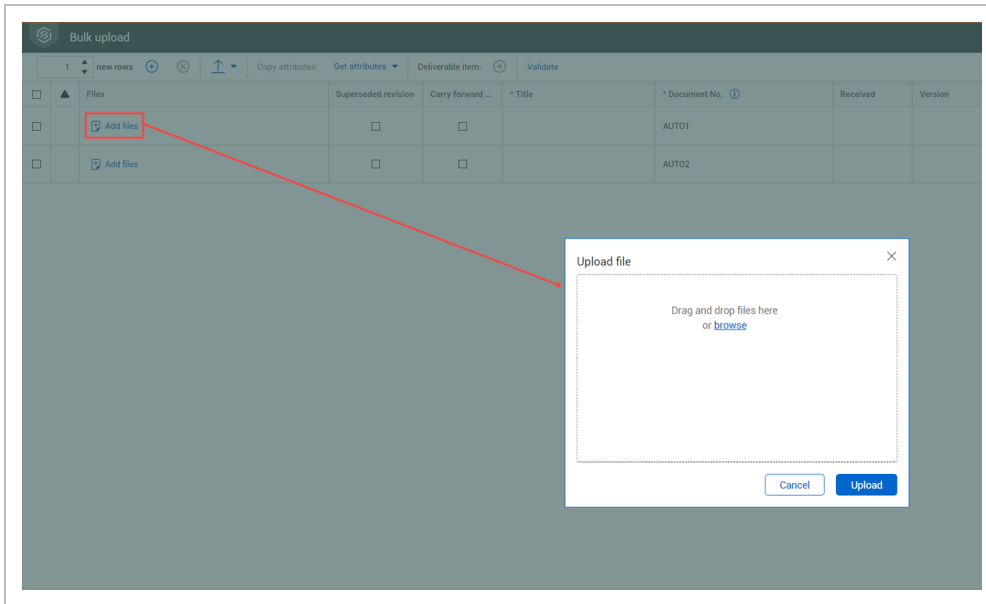
Considerations: If you are using standard folders, you can select a folder before starting these steps, and the documents are automatically added to that folder.

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

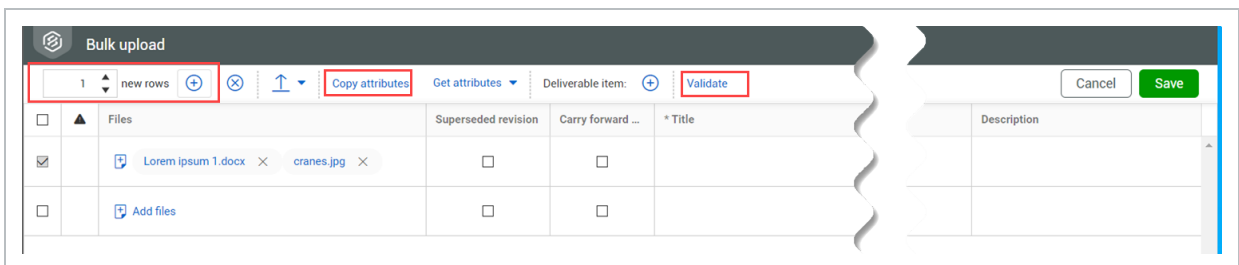


The Bulk upload dialog box opens.

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

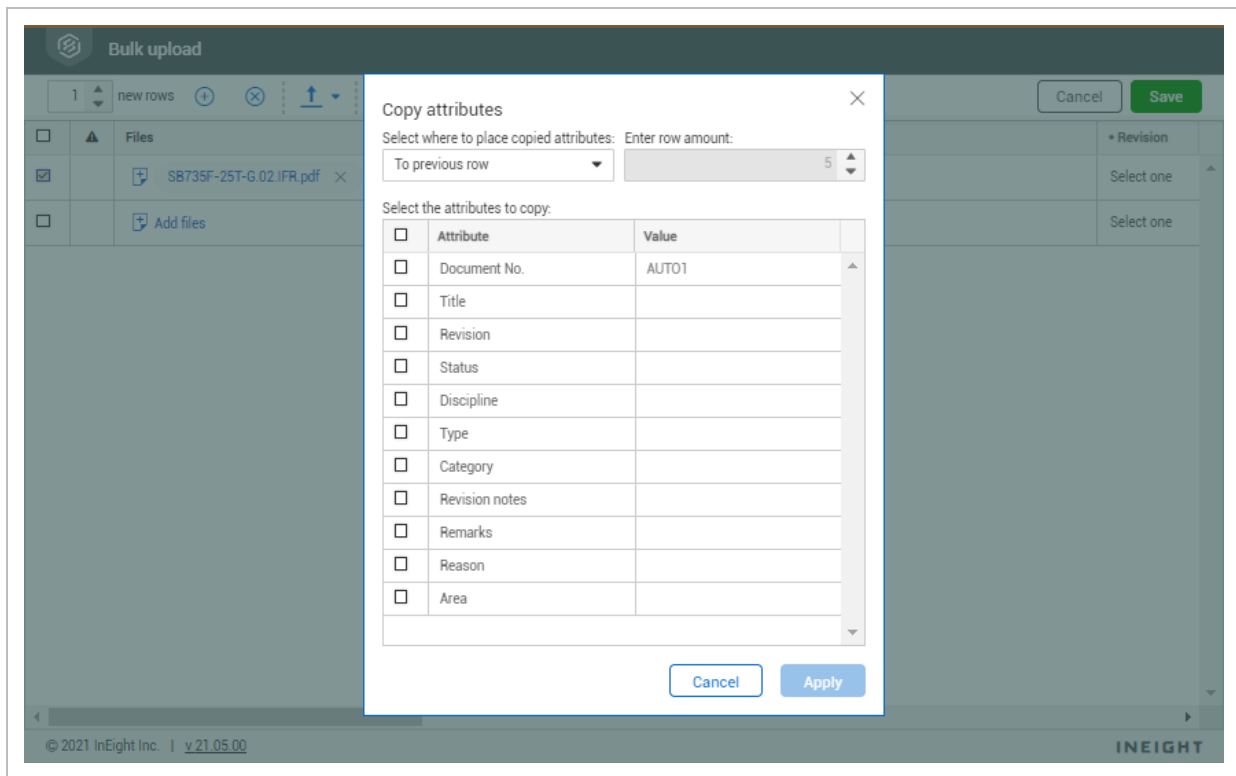


3. Drag and drop files for the document entry into the Upload file dialog box. You can upload multiple files for each document if they are of different file formats. After all files are added, click **Upload**.
4. Complete the required fields and the applicable optional fields.
5. Repeat steps 2-4 as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



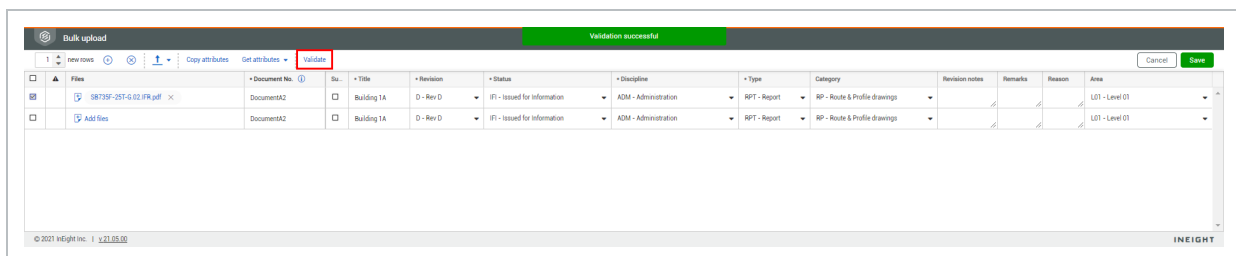
To delete a row, select the document, and then click the **Delete rows** icon.

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.

- 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.



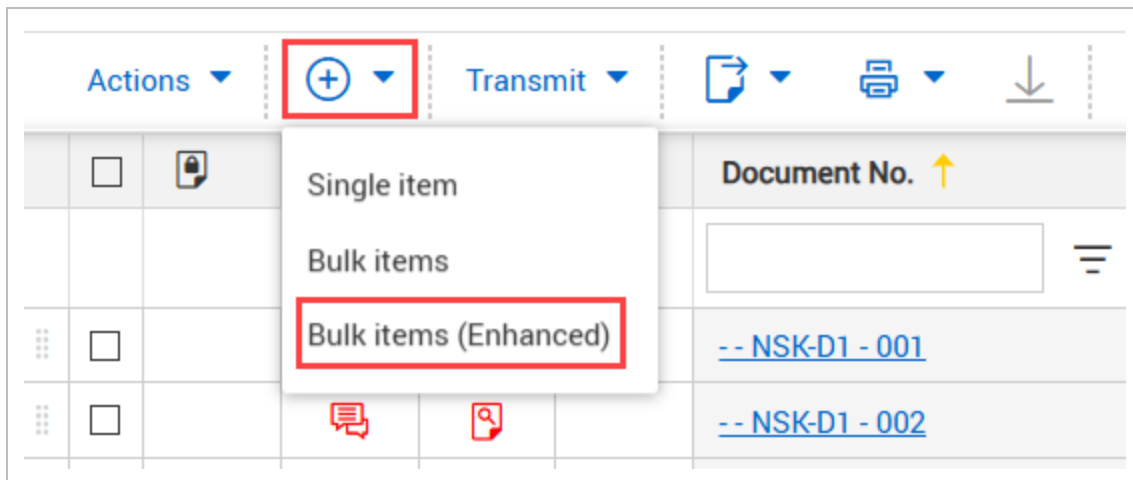
- Click **Save**. A confirmation box opens.
 - Click **Yes** to create a transmittal for the saved documents.
 - Click **No** to return to the Documents Register.

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.

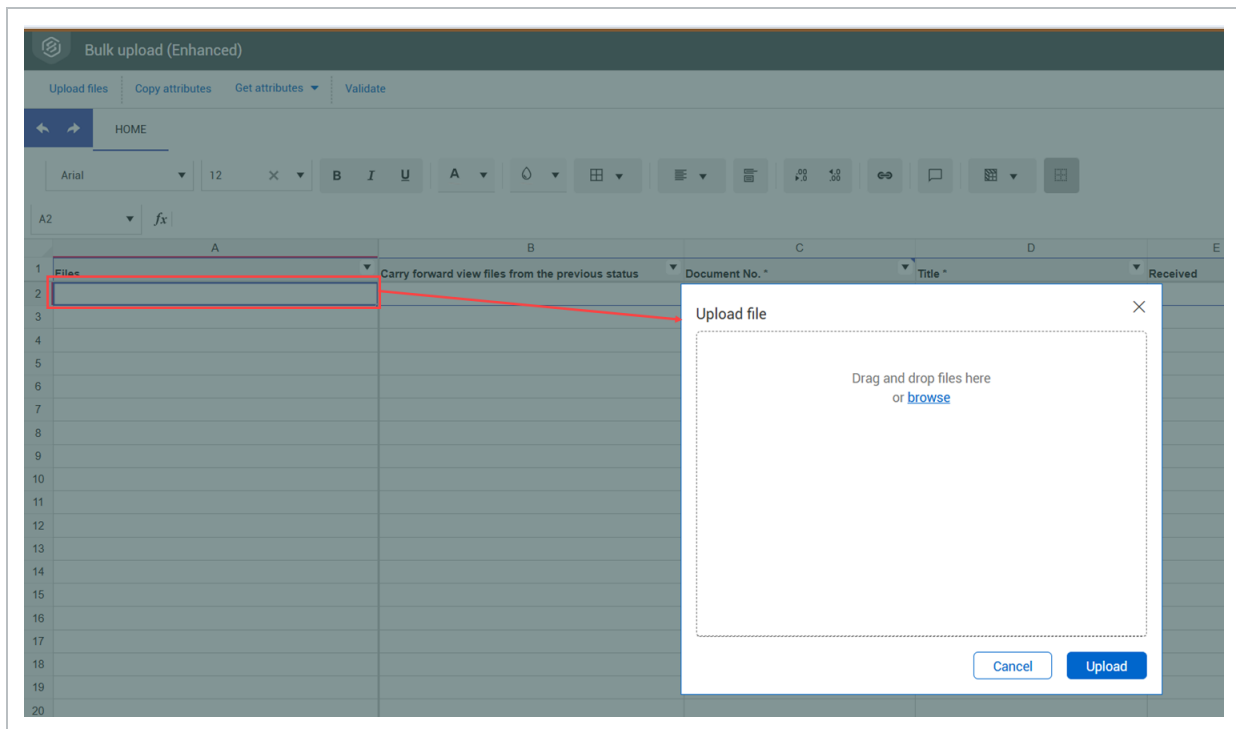
Considerations: If you are using standard folders, you can select a folder before starting these steps, and the documents are automatically added to that folder.

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



The Bulk upload (Enhanced) dialog box opens.

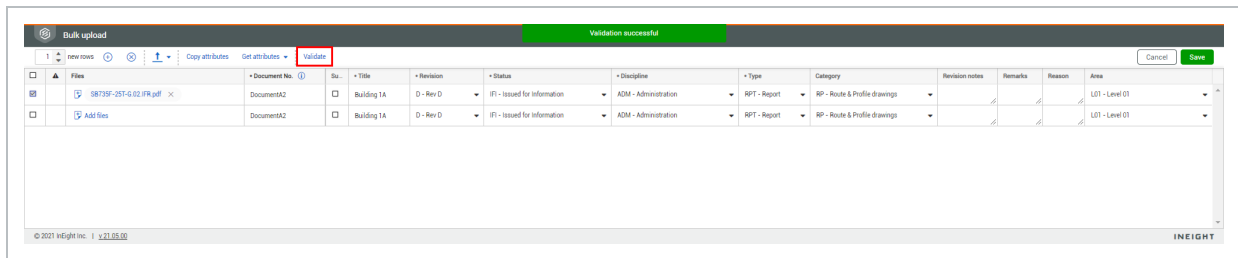
2. Click the first available cell in the Files column. The Upload file dialog box opens. Alternatively, you can click the **Upload files** button.



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.

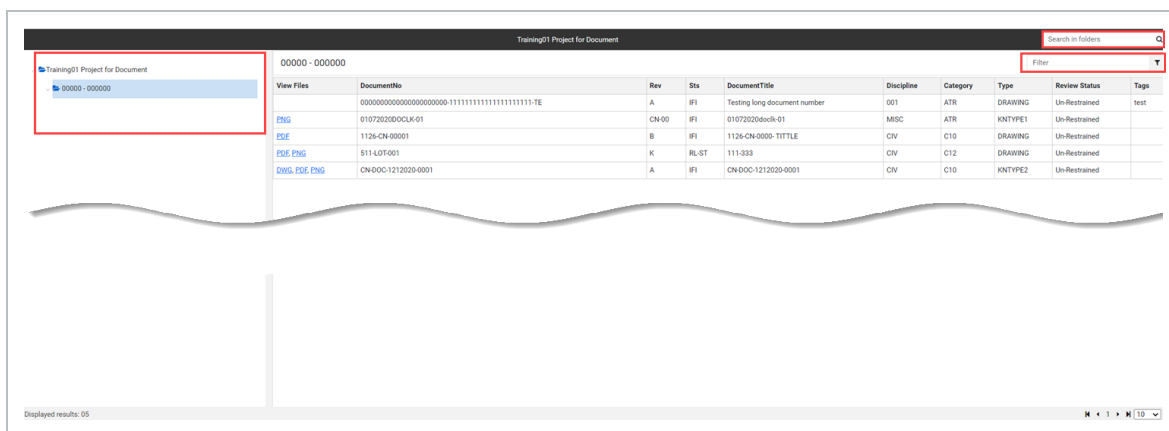
- Click **Yes** to create a transmittal for the saved documents.
- Click **No** to return to the Documents Register.

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.HTMLML`. 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.



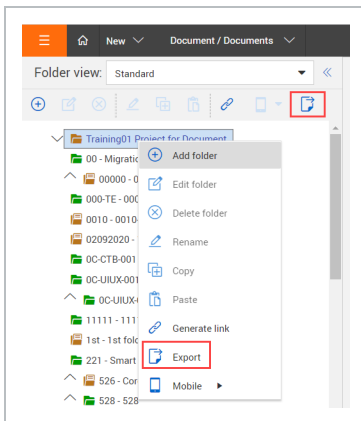
The grid shows the files in a folder along with document metadata. You can click the file link to open the file.

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.

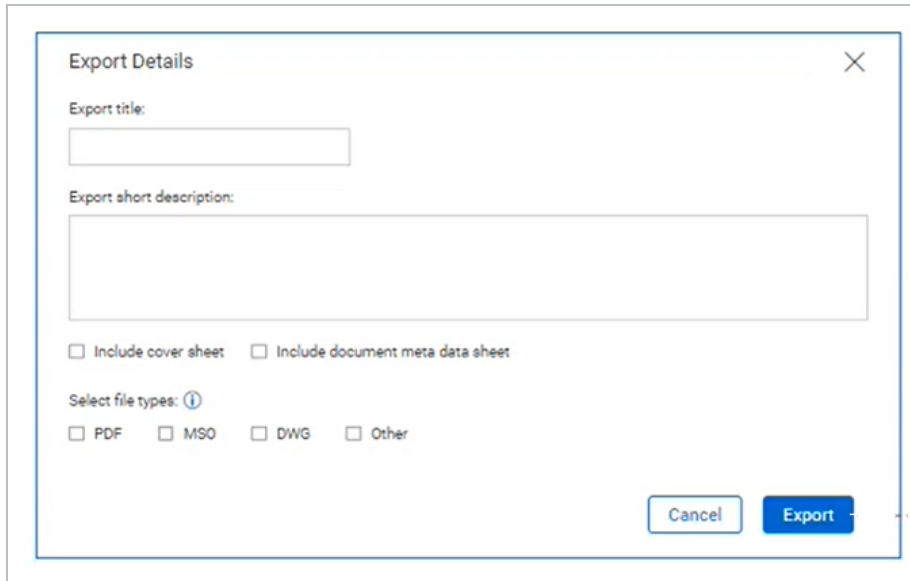
Folder export is for standard and smart folders only.

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.



The image shows a dialog box titled "Export Details" with a close button (X) in the top right corner. Inside the dialog, there are two text input fields: "Export title:" and "Export short description:". Below these fields are two checkboxes: "Include cover sheet" and "Include document meta data sheet". Underneath the checkboxes is a section labeled "Select file types: ⓘ" with four checkboxes: "PDF", "MSO", "DWG", and "Other". At the bottom right of the dialog are two buttons: "Cancel" and "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.

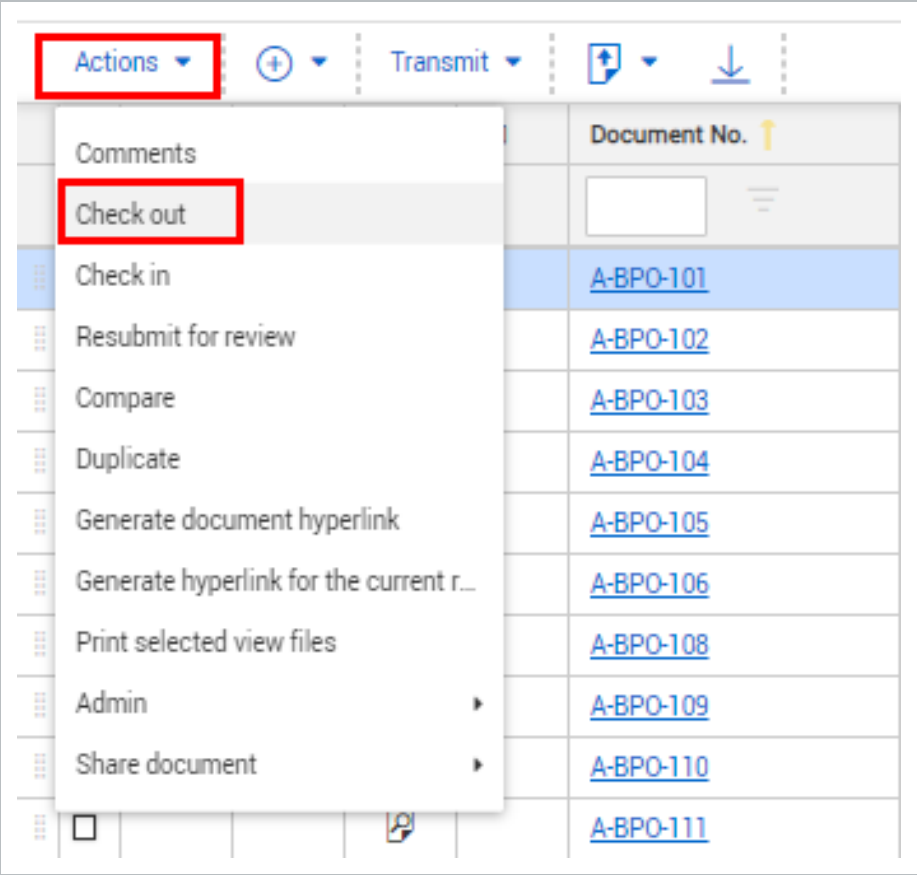
2.1 CHECKING OUT AND CHECKING IN DOCUMENTS

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.

The 'Document check out' dialog box is shown. It includes a title bar with a close button (X). Below the title, there is a message: 'Only the documents you have access to will be checked out.' and a checkbox labeled 'Apply reason to all documents.' which is currently unchecked. A table is displayed with the following data:

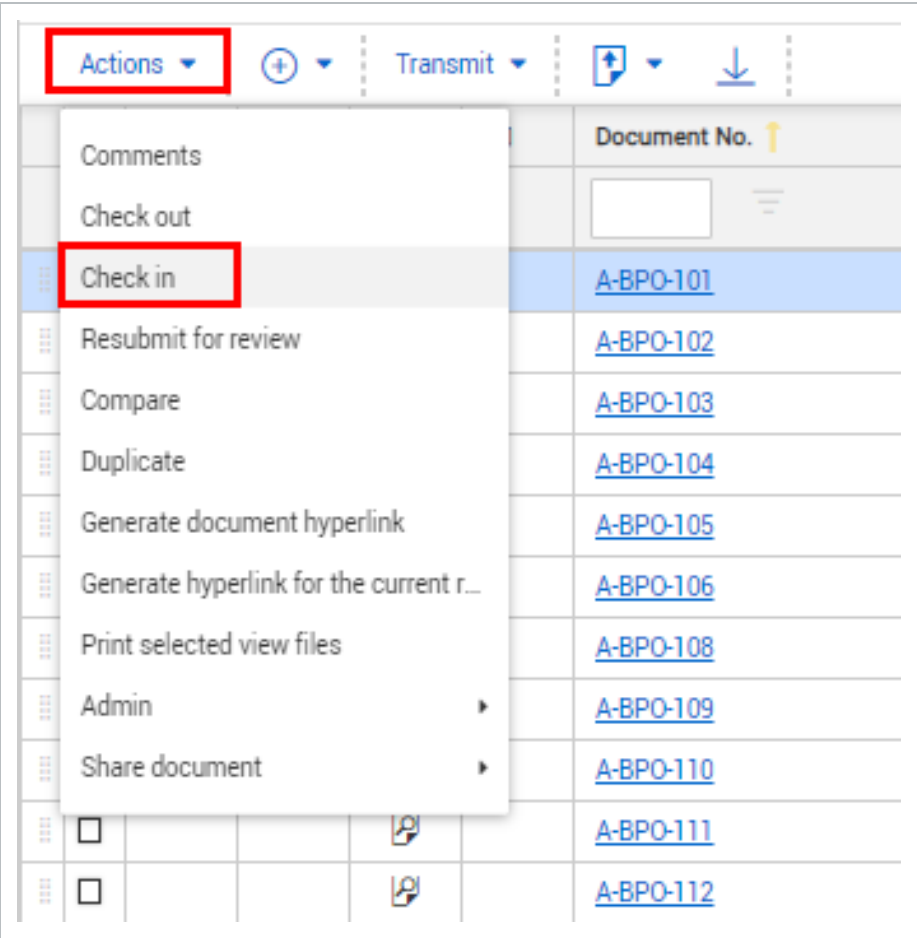
Document No.	Rev	Sts	* Reason for check out	Remove Access
A-BPO-101	00	IFC		☒

The 'Remove Access' checkbox for the first row is highlighted with a red box. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Check out'.

- 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.

Document check in

The following documents are not valid for check in.

Document No.	Rev	Sts	Reason
A-BPO-101	00	IFC	

Close

4. Click **Check in**.

5. Click **Yes** to confirm.

NOTE

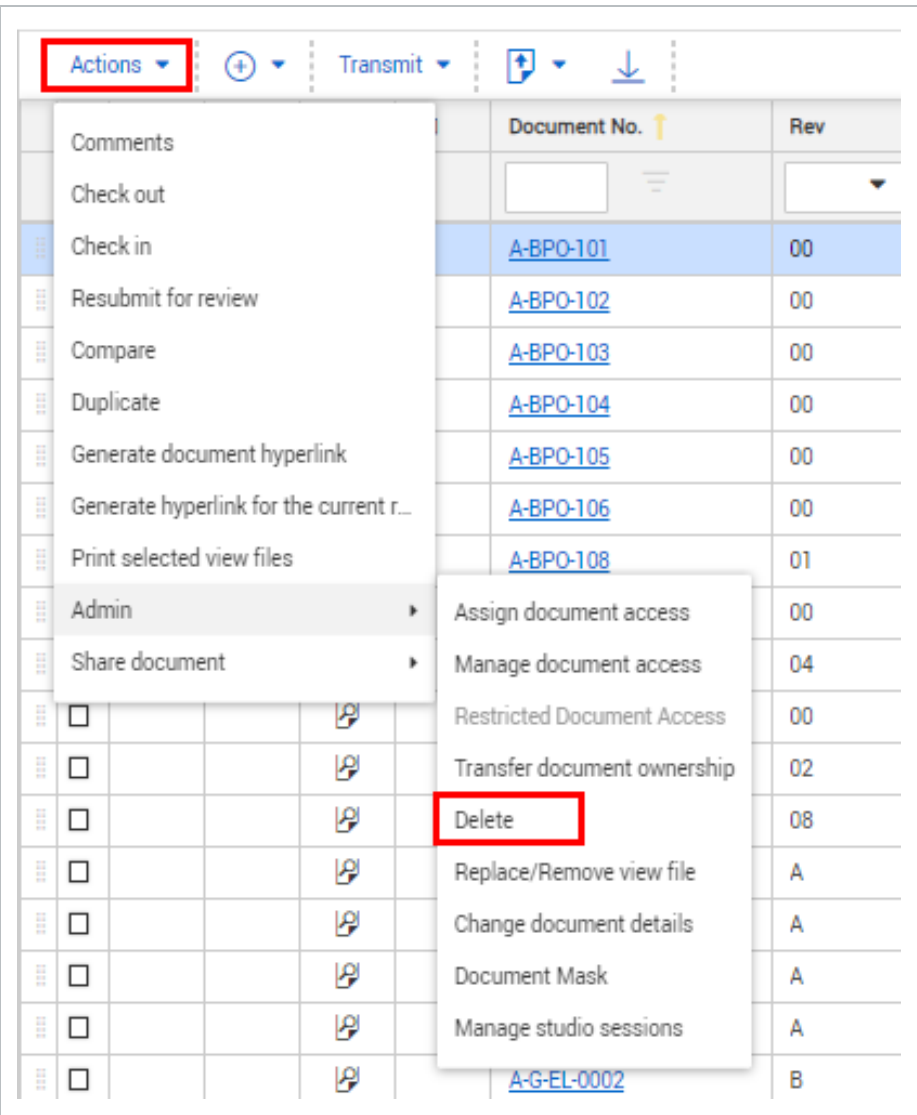
- Documents that are checked out will have a **padlock icon** displayed next to them in the Register.
- Documents can also be checked out from the document details window.

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.

Document deletion

The following documents were selected for deletion. Enter a reason as to why they are to be deleted.

☐ Apply reason to all documents.

Document No.	Rev	Sts	Current history	* Reason for deletion
A-BPO-101	00	IFC	View history	

☐ Notify all the users who have access to these documents about the deletion.

Cancel

Delete

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

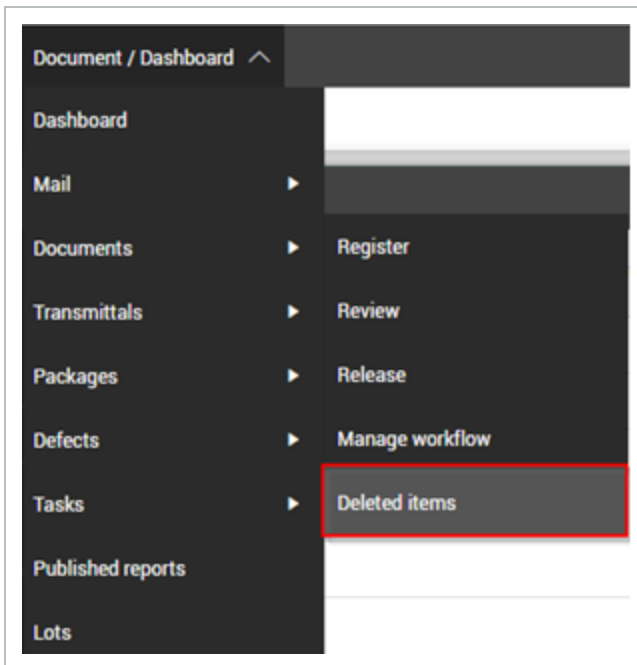
There are times when a deleted document needs to be restored to the Documents register. If you have the proper security group permissions, you can restore deleted files and comments. If a document has been deleted within the last 30 days, the document is restored with comments. If it is after 30 days,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

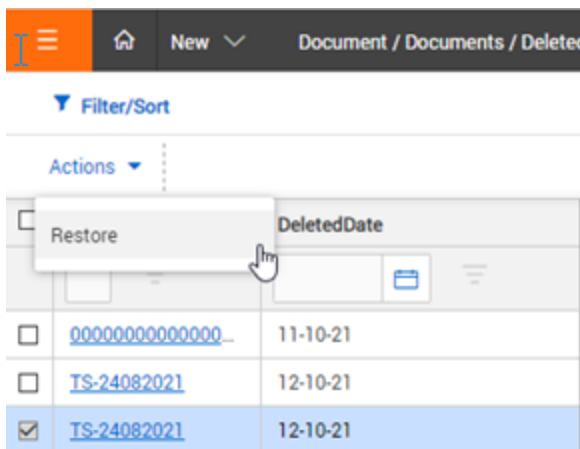
You must have the applicable permissions to restore documents. If you do not have the proper security group permission, see your system administrator.

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

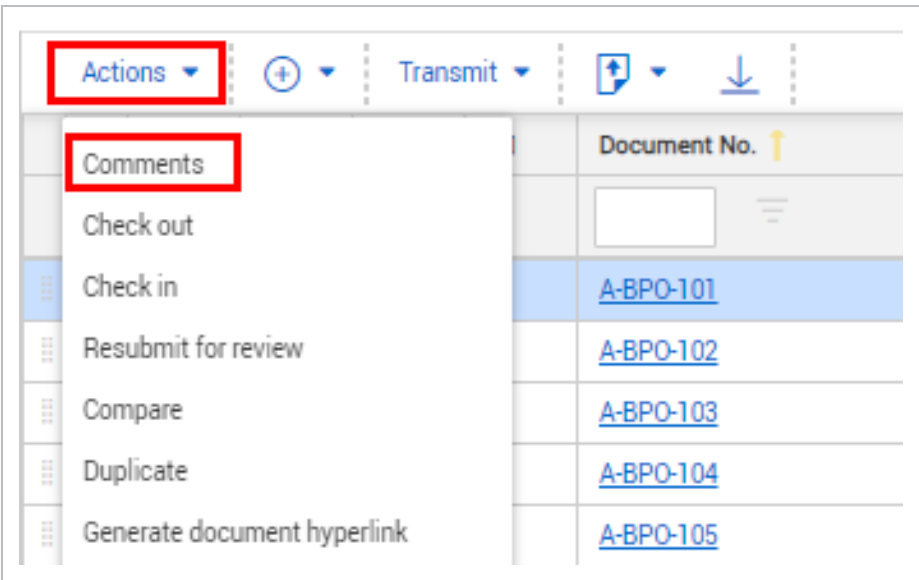
You can add comments to documents and control who can view them.

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.

The screenshot shows the 'New Comment' dialog box. At the top is a dark header with the InEight logo and the title 'New Comment'. Below the header, there is a section for comments with a text area and a rich text toolbar containing options like FORMAT, B (bold), I (italic), U (underline), and various alignment and list icons. Below the text area are three dropdown menus: 'Category' (with 'Select one...' as the placeholder), 'Available to:' (with 'Company' as the placeholder), and 'Raised by company' (with 'Select one...' as the placeholder). To the right of the 'Raised by company' dropdown is another dropdown labeled 'Raised by' (also with 'Select one...' as the placeholder). Below these are two checkboxes: 'Send document comments to' with options for 'Originator' and 'Document recipients'. At the bottom of the main form area is an 'Attach files' section with a file upload icon and text, and two download links: 'Download all' and 'Download selected'. Below this is a large empty box with the text 'There are no attachments uploaded.' At the bottom right of the dialog are 'Cancel' and 'Save' buttons. The footer of the dialog contains the copyright notice '© 2020 InEight Inc. | v 19.2' and the InEight logo.

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.

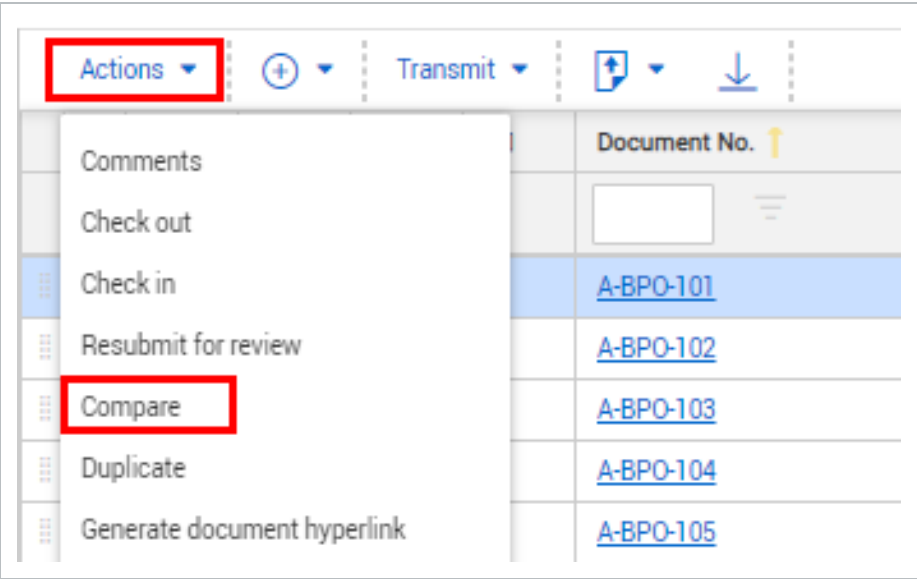
NOTE For large files the comparison can take some time to prepare.

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**.



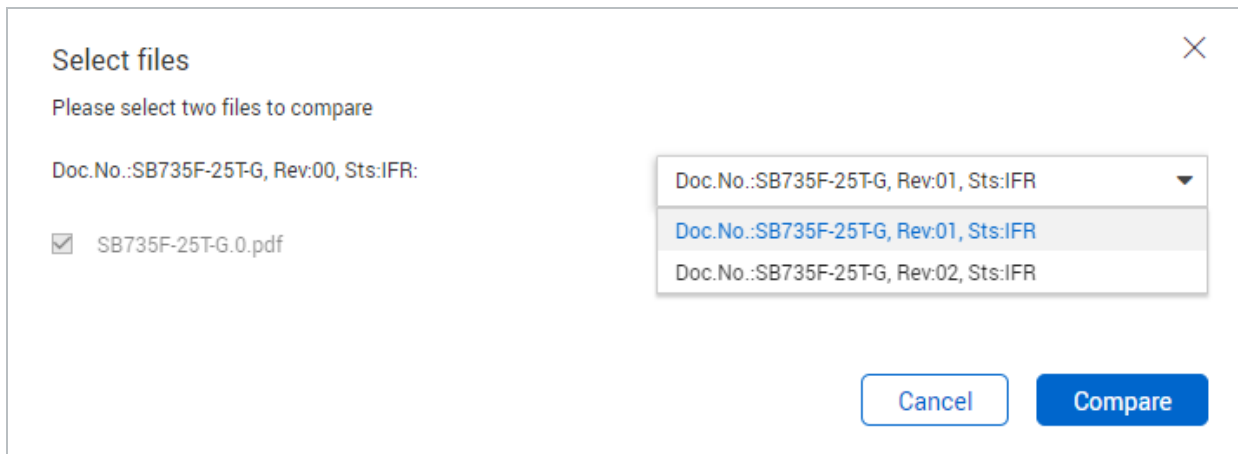
The two documents are shown overlaid in the Viewer.

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 screenshot shows a 'Select files' dialog box with a close button (X) in the top right corner. The text 'Please select two files to compare' is displayed. Below this, the document identifier 'Doc.No.:SB735F-25T-G, Rev:00, Sts:IFR:' is shown. A file 'SB735F-25T-G.0.pdf' is listed with a checked checkbox. To the right, a dropdown menu is open, showing three options: 'Doc.No.:SB735F-25T-G, Rev:01, Sts:IFR' (highlighted in blue), 'Doc.No.:SB735F-25T-G, Rev:01, Sts:IFR' (highlighted in blue), and 'Doc.No.:SB735F-25T-G, Rev:02, Sts:IFR'. At the bottom right, there are two buttons: 'Cancel' and '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.

Compare Files

Doc.No:SB735F-25T-G, Rev:00, Sts:IFR Doc.No:SB735F-25T-G, Rev:02, Sts:IFR

PDF - SB735F-25T-G.0.pdf And PDF - SB735F-25T-G.2.pdf Compare

SB735F-25T-G.00.IFR.pdf SB735F-25T-G.02.IFR.pdf [Compare View](#)

XCBNBRB SQUARED DTV & MPA		TITLE OF MATERIALS	
ALABAMA DOT		(1) 1 INCH PLATE	1 INCH
		(2) 1/2 INCH BOLTS	1 INCH
		(3) 1/2 INCH NUTS	1 INCH

DWG# SB735F-25T-G

Scale: 1/4" = 1'-0"

Date: 11/11/11

Drawn By: J. GRIFFIN

Checked By: [Signature]

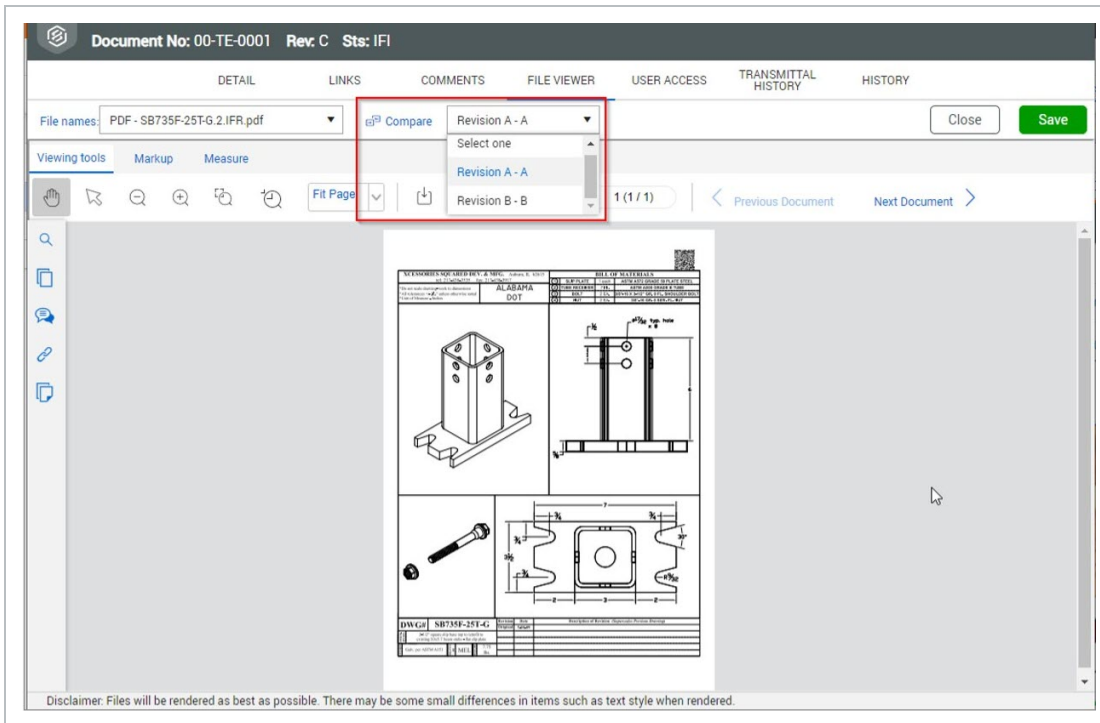
Approved By: [Signature]

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.



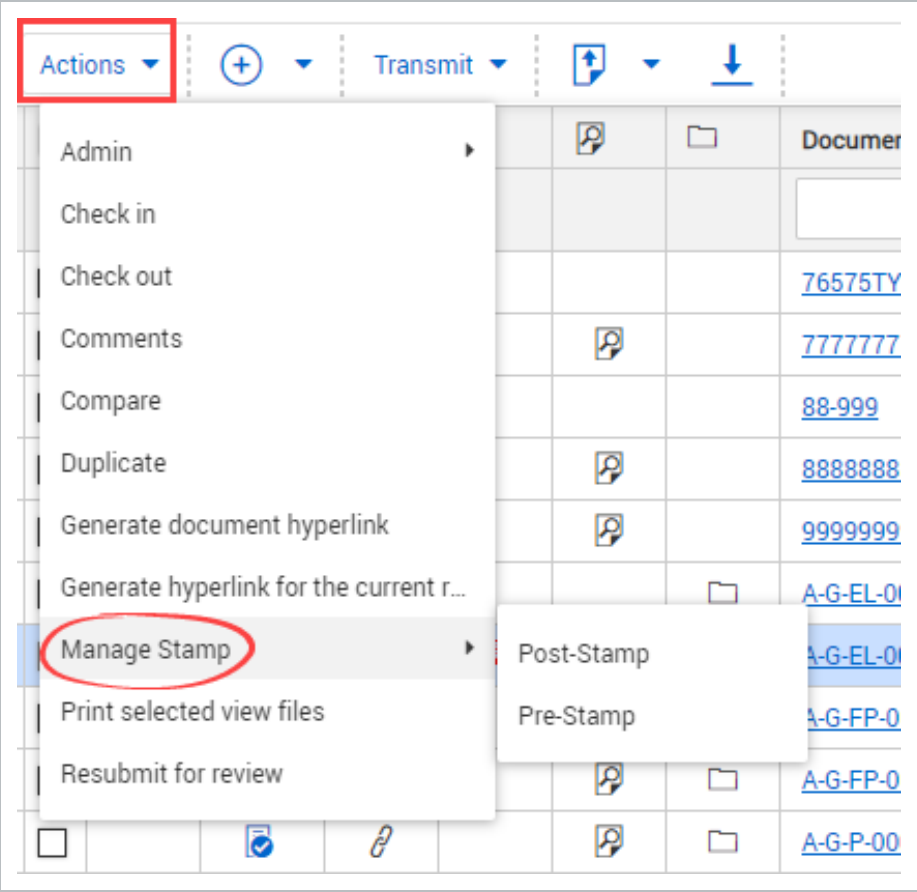
2. Select another revision of the document. The two revisions are overlaid on top of each other in the Viewer. Items shown in blue indicate the newer revision. Items showing in orange indicate the older revision. Items showing in black indicate no change.

2.6 STAMPING DOCUMENTS

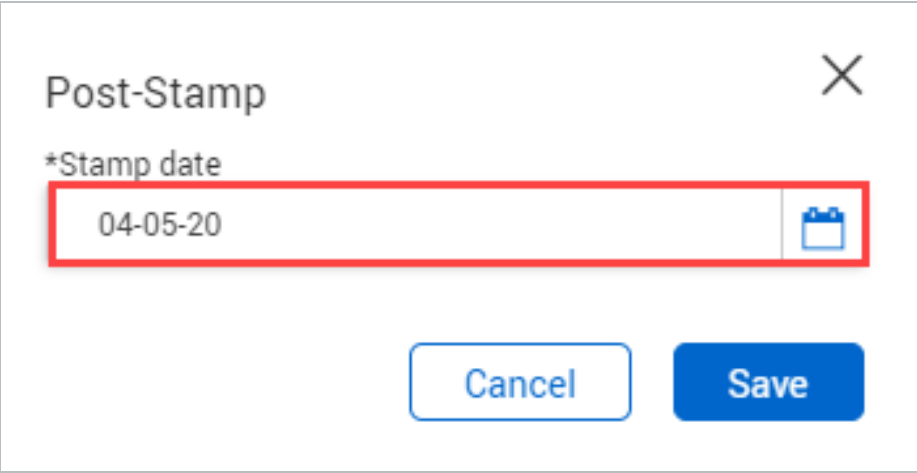
If the Vendor Data module is enabled, you can apply pre-review and post-review stamps to documents.

2.6.1 TO POST-STAMP A DOCUMENT:

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



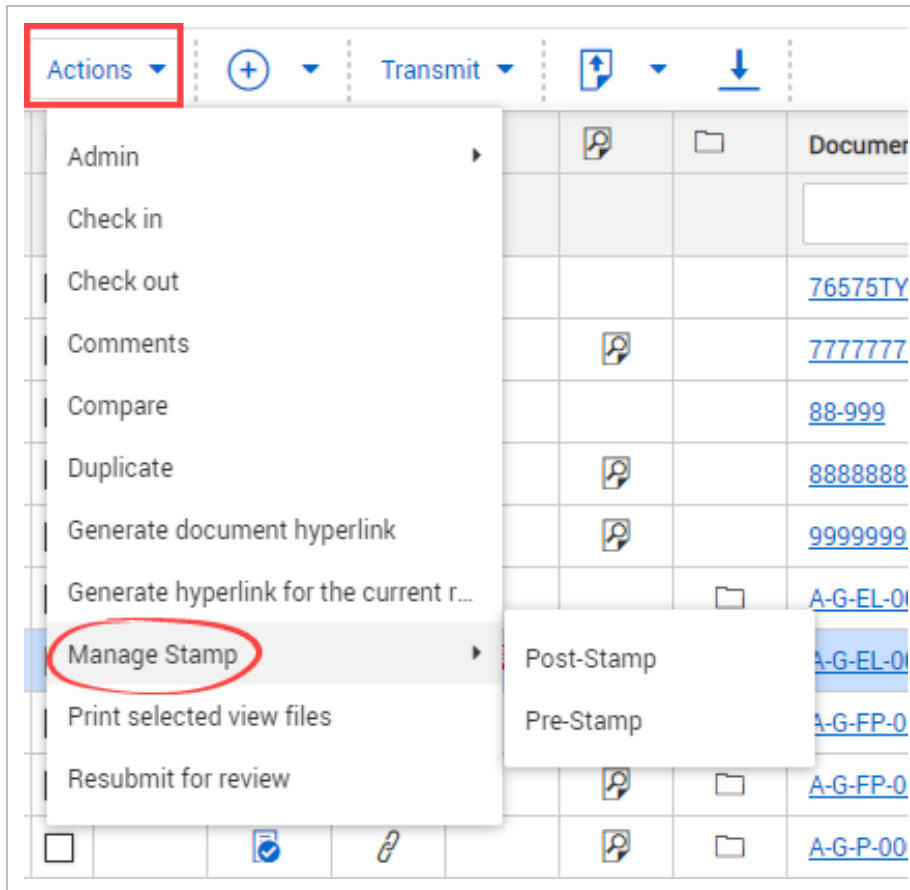
3. Select the date.



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.

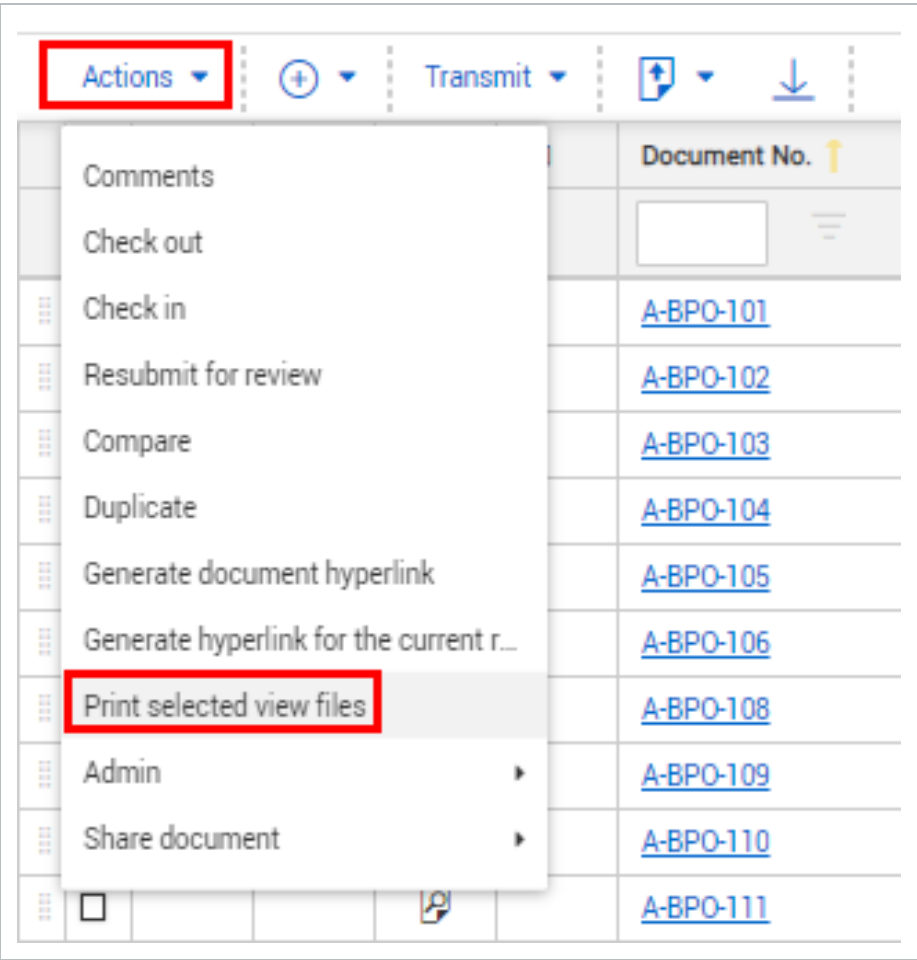


2.7 PRINTING DOCUMENT VIEW FILES

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.

×

Select files to print

Group by

Document No.

File type

☒

Select all files

☒	Document No: 1126-CN-002	Rev: B	Sts: IFI	3 files
☒	VDP-02-06-2.A.TSUN2.doc			106 KB
☒	aaa.pdf			160 KB
☒	g.PNG			8 KB

Total items: 3 Selected items: 3 Selected file size: 273 KB

Cancel

Print

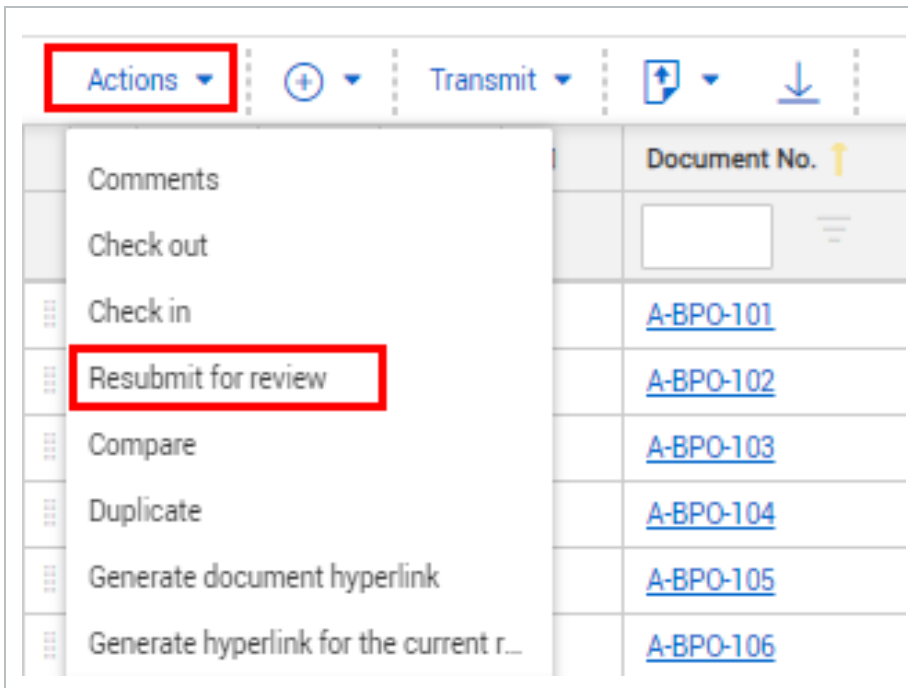
3. Click **Print**.

2.8 RESUBMITTING A DOCUMENT FOR REVIEW

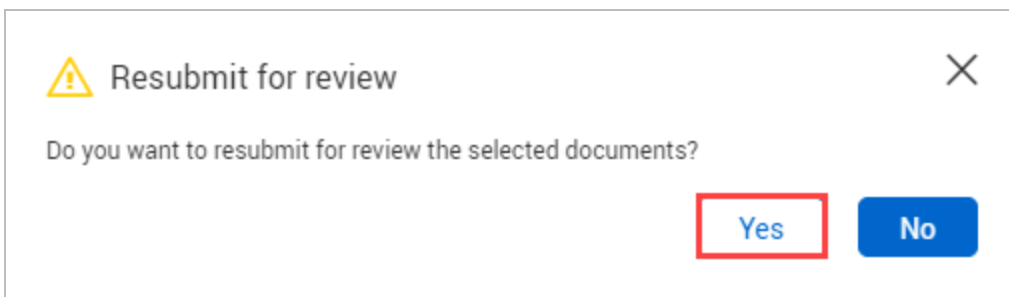
Resubmit documents for review directly from the Documents Register.

2.8.1 TO RESUBMIT A DOCUMENT FOR REVIEW:

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



2. Click **Yes**.



2.9 FAVORITING DOCUMENTS

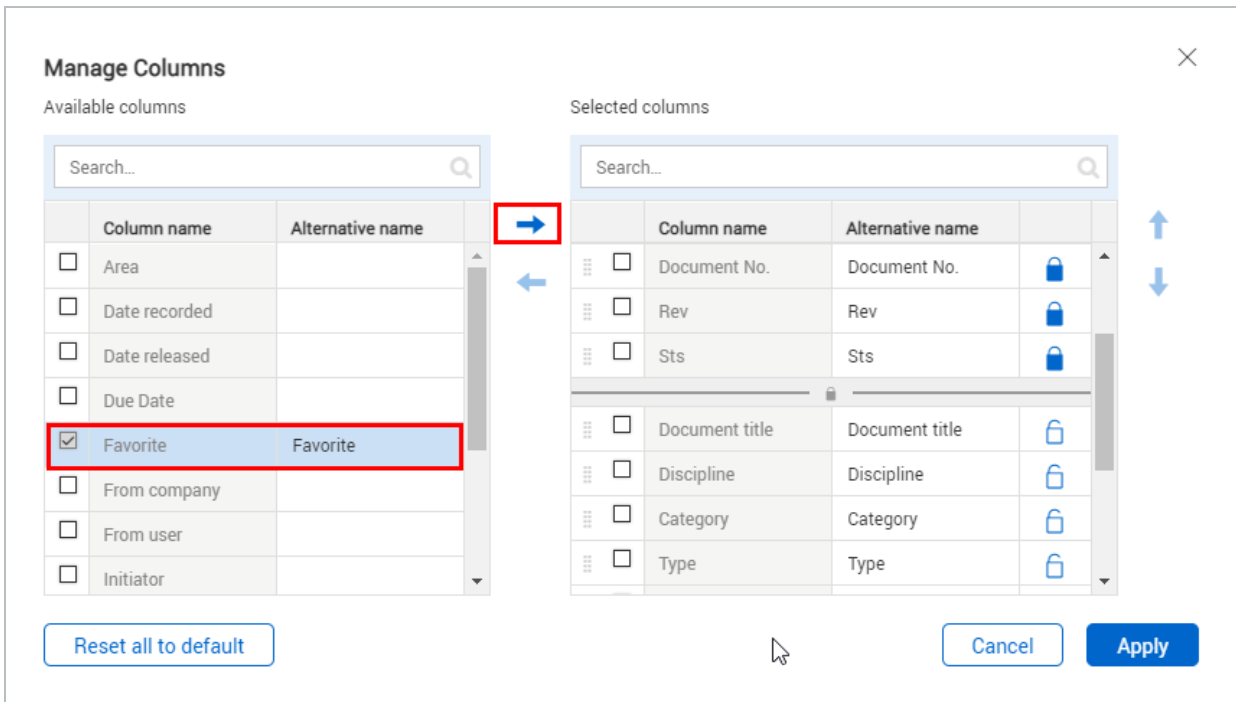
Favorite documents to easily access them.

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**.

Show: All

Search all Document

	PDF	MSO	DWG	Other	 
					
					
					
					
					

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.

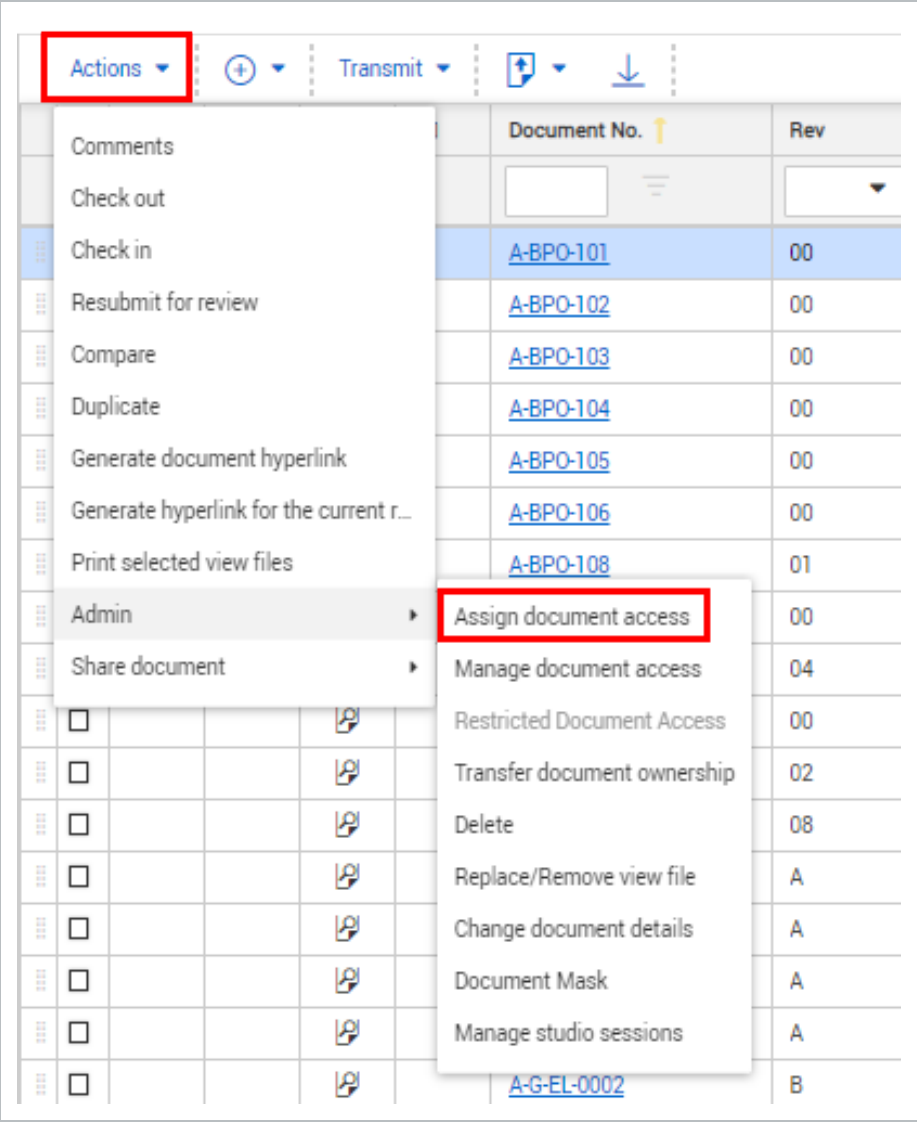
See the links below for information on how to manage documents.

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**.

Assign Document Access

1

2

Select users

Select files

Select users

Available Users

Colt Contracting

Search

☐	Name
☒	Gina Jones
☒	Jacob Palmer
☒	Jean Black
☐	Nabil Hassan

☐ Grant access to previous and future revisions

Selected Users

Clear allocated

Search

Name	Company
No records to display	

Cancel

Next

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

Assign Document Access

1

2

Select users

Select files

Select files

DocumentNo	Rev	Sts	Title	Disc	Cat	PDF	DWG	DOC	OTHER
1-2182020-PD...	A	IFI	1-2182020-PDF-001	TEST	C1	☐			☐

☐ Grant access to previous and future revisions

Cancel

Back

Finish

- 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.

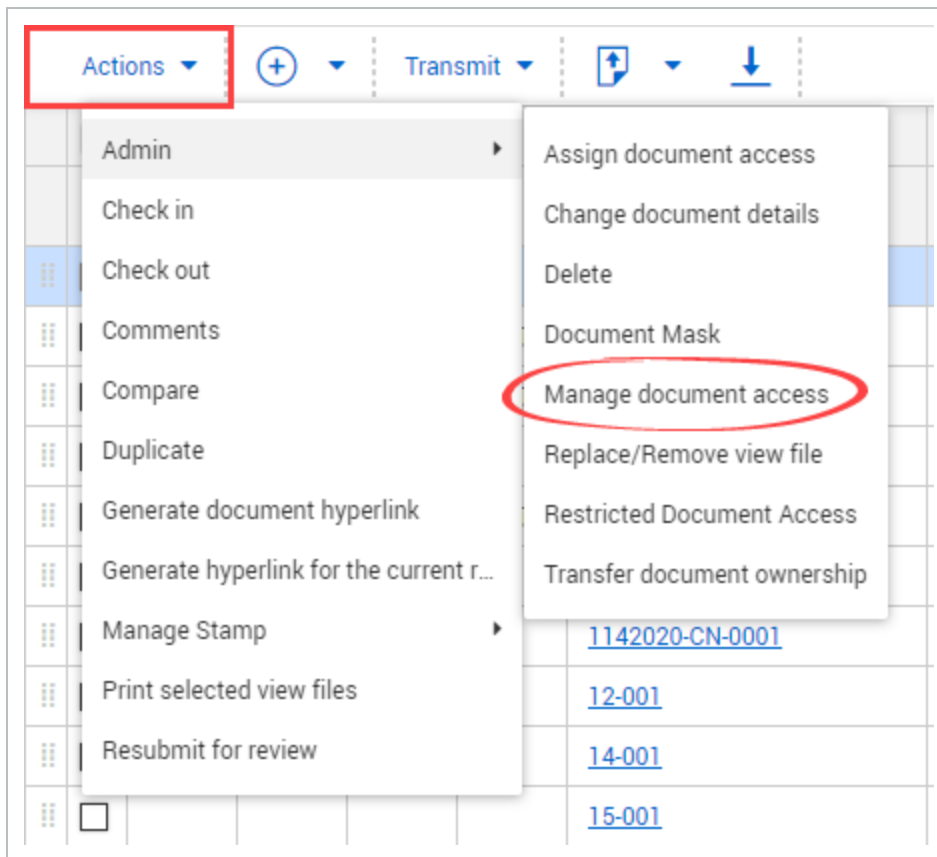
3.2 MANAGING DOCUMENT ACCESS

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.

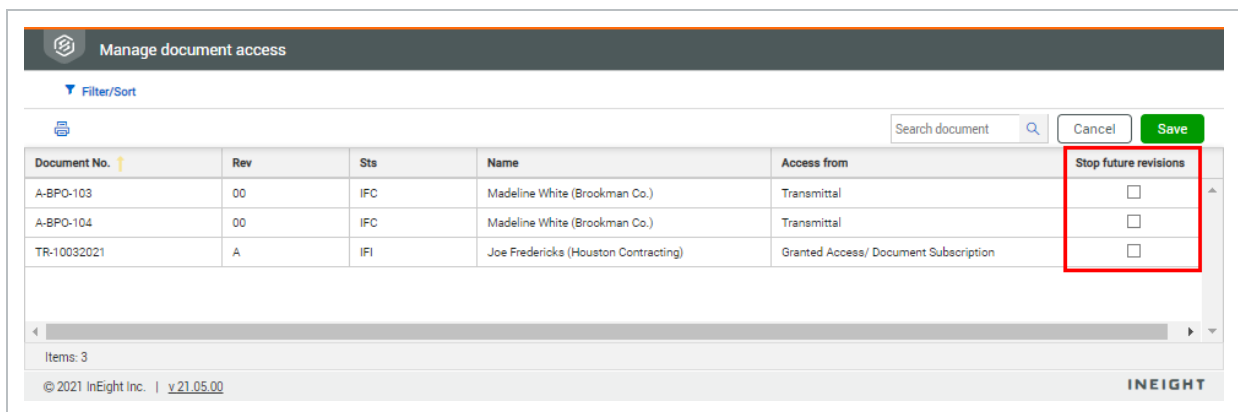
A user's access to future revisions of one or more documents can be removed using the manage document access function.

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.

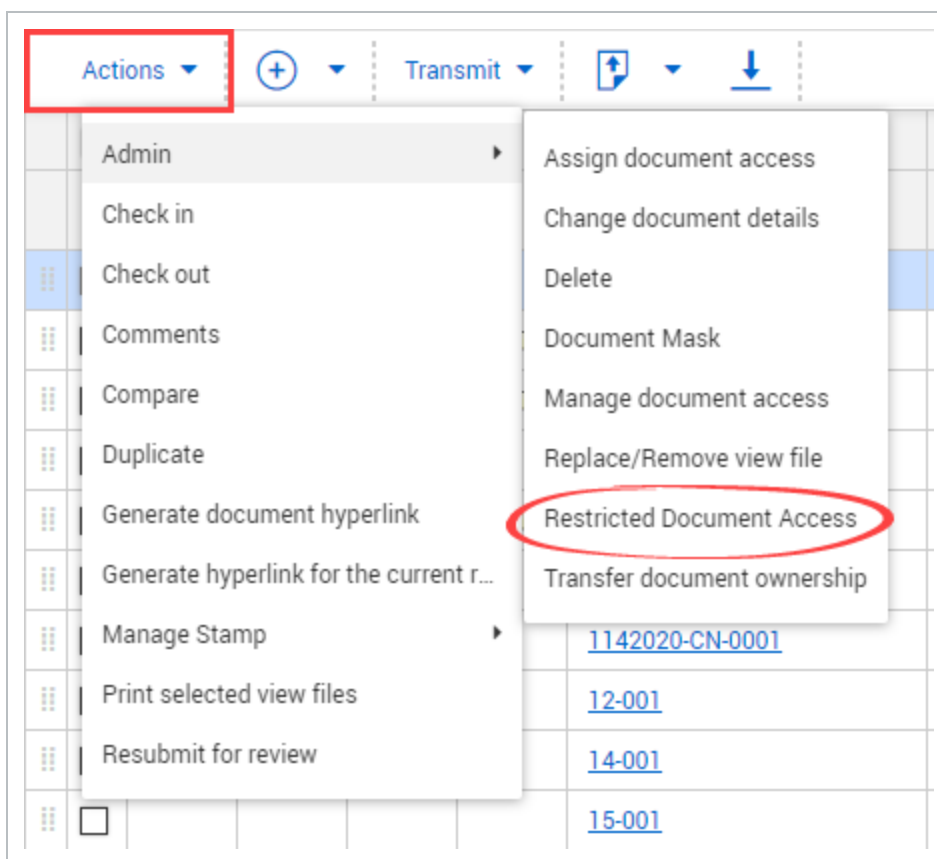
3.3 MANAGING RESTRICTED DOCUMENTS

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.

Restricted Document Access

CancelSave

Rule selection: 159

Set restricted conditions

Clear all conditions

Show:

AllDocuments that my company has uploaded

Filter by:ColumnOperatorValue

+Select one...Select one...Select some items..

+ANDSelect one...Select one...Select some items..

Note: The restriction applies to Company Uploaded documents, incoming and outgoing transmittals.

Set users who have access to the restricted document

Edit user listClear all usersClear selected users

Company	Name
---------	------

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

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Select contacts

* Display: ☒ All contacts ☐ Contact groups ☐ Roles

Select contacts to have access to restricted document

19.1 Company Search

☒	Name
☒	SD SD

→

Contacts allocated to have restricted access [Clear allocated](#)

Search

Name	Company
No records to display	

Cancel Apply

8. Click **Apply**.

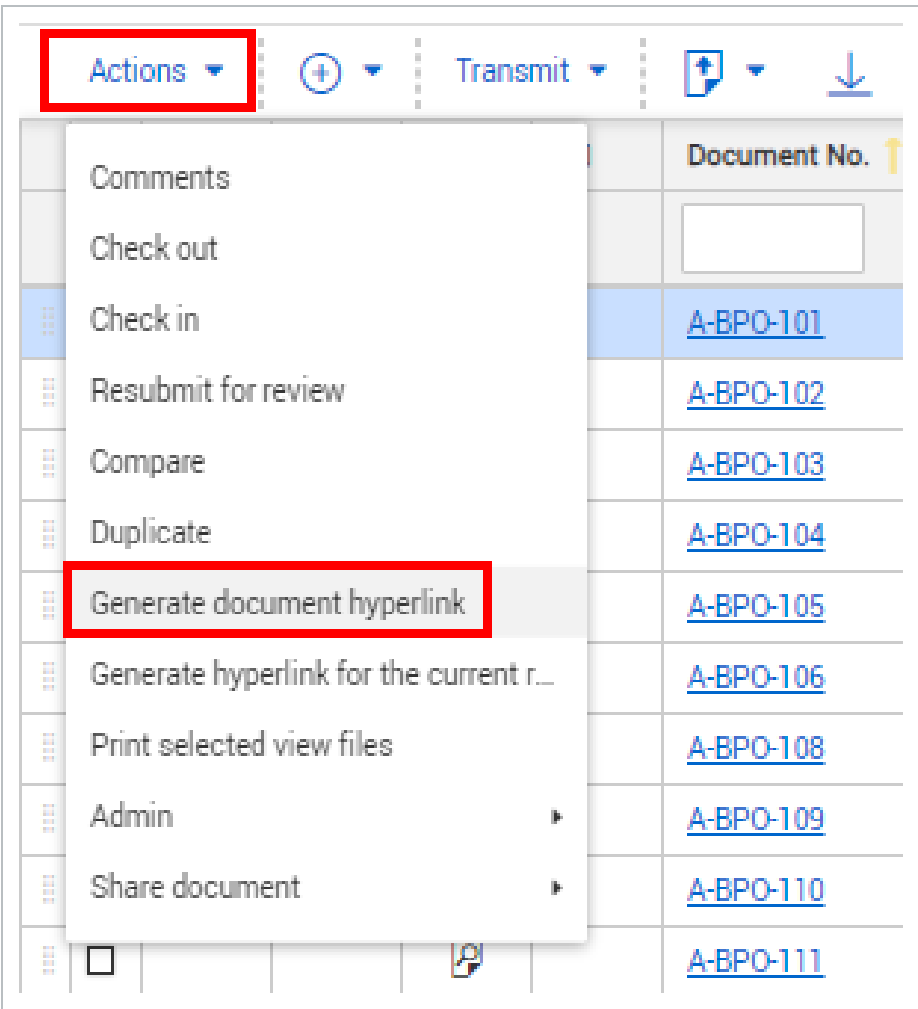
9. Click **Save**.

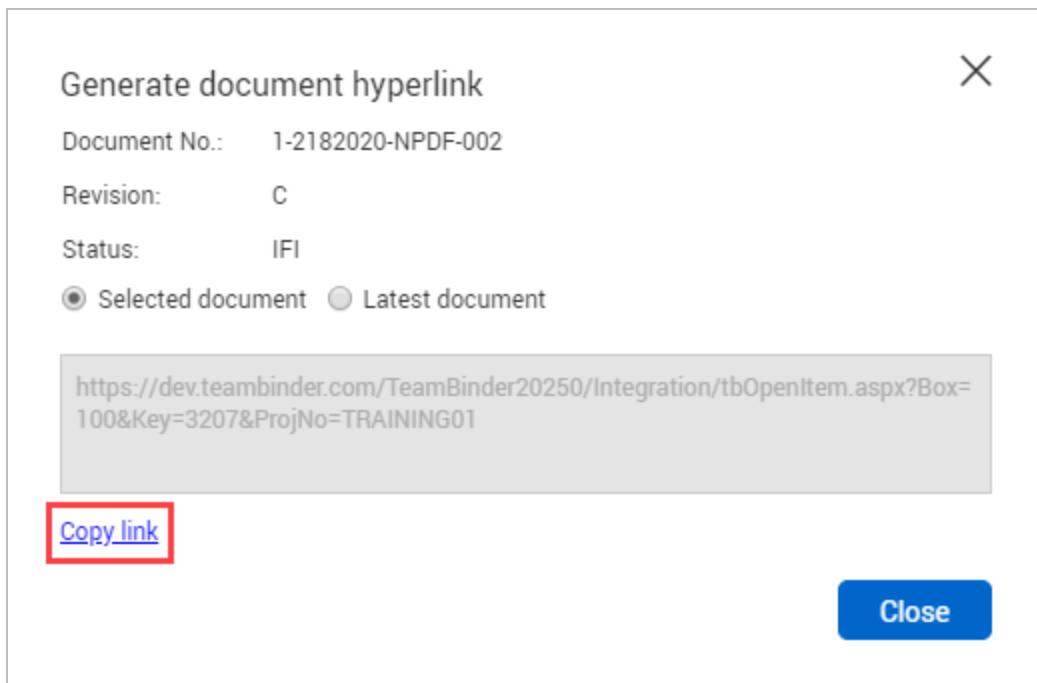
3.4 GENERATING DOCUMENT HYPERLINKS

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**.



3. Click **Copy link**.

Generate document hyperlink

Document No.: 1-2182020-NPDF-002

Revision: C

Status: IFI

☒ Selected document ☐ Latest document

<https://dev.teambinder.com/TeamBinder20250/Integration/tbOpenItem.aspx?Box=100&Key=3207&ProjNo=TRAINING01>

[Copy link](#)

Close

4. Click **Close**.**NOTE**

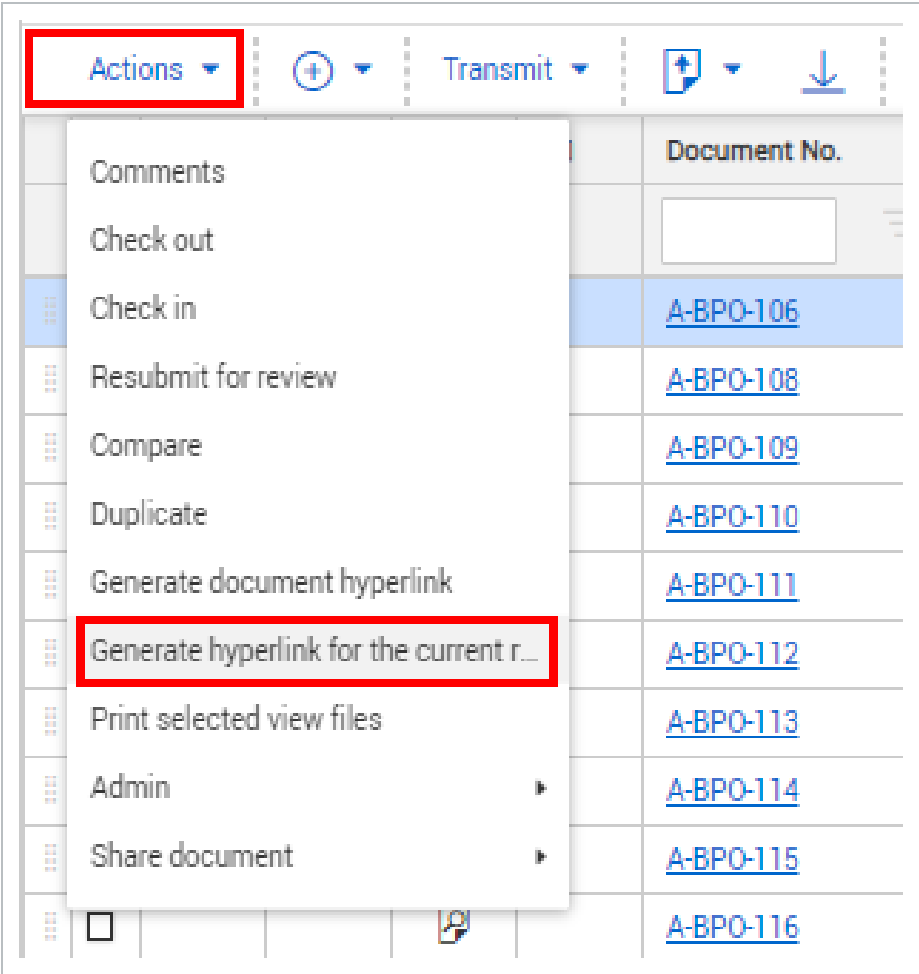
- The recipient of the hyperlink must have access to the document.
- The recipient of the link must log in to InEight document to view the document.
- Generate a hyperlink for the current Register view by selecting **Generate hyperlink for the current Register**. This will show the latest documents uploaded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

3.5 GENERATING A HYPERLINK FOR THE CURRENT REGISTER

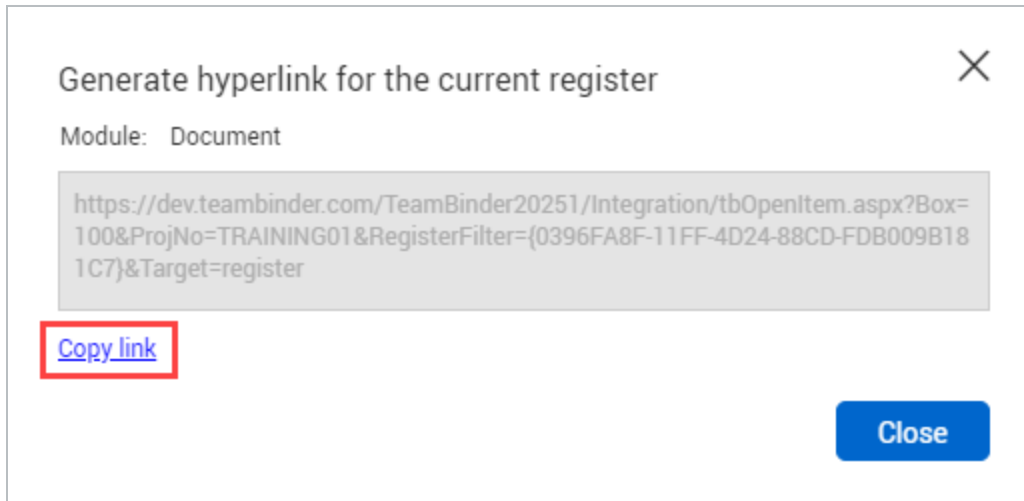
A hyperlink to the current **Documents Register** can be sent to another user that will take them directly to the current Register view.

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**.



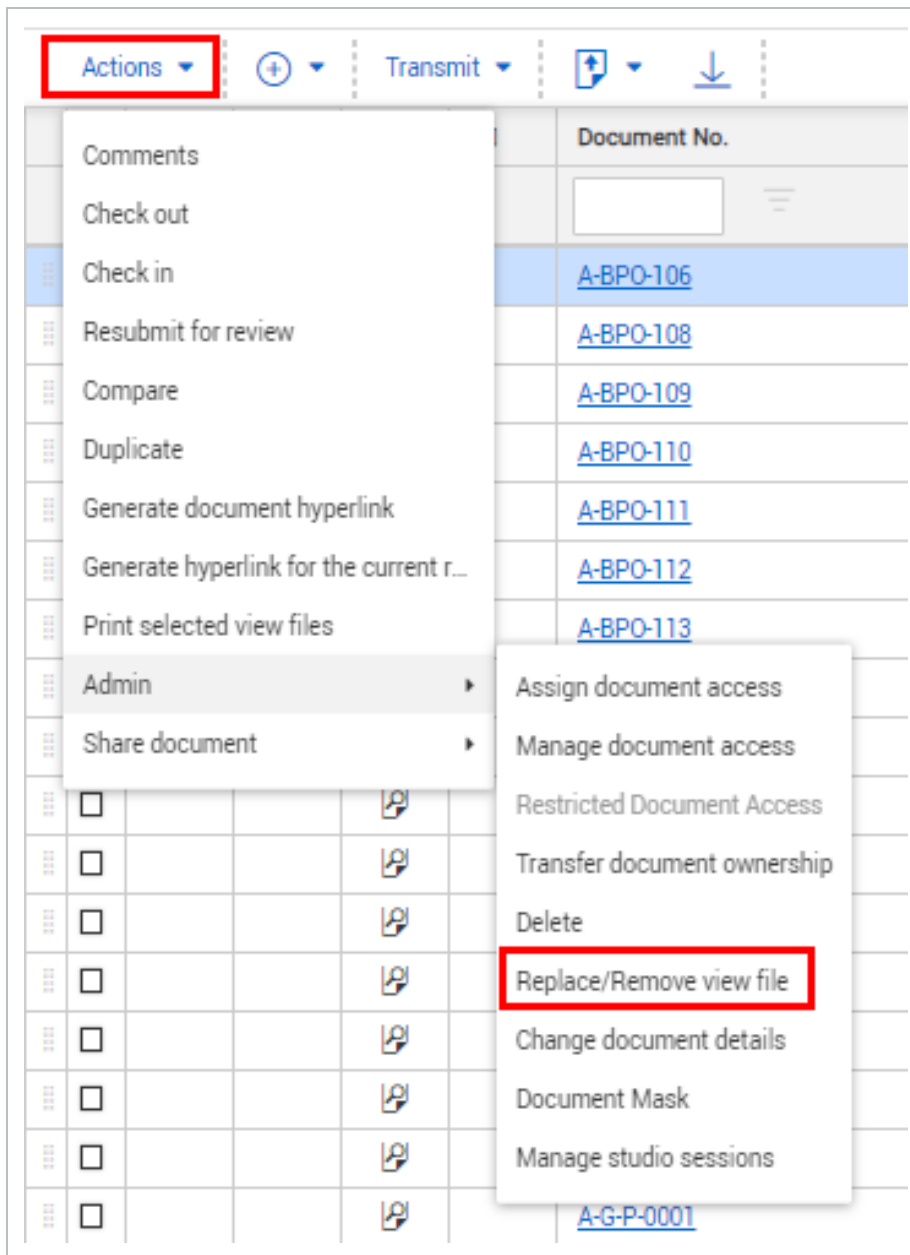
3. Click **Close**.

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.

Replace/Remove view files

☐ Apply first comment to all remaining actionable items

Document No.	Rev	Sts	Current file	Remove action	Redline markups	New file
1-2182020-NP...	C	IFI	10. Revision B.png	Replace	Copy Redlines	 Add files

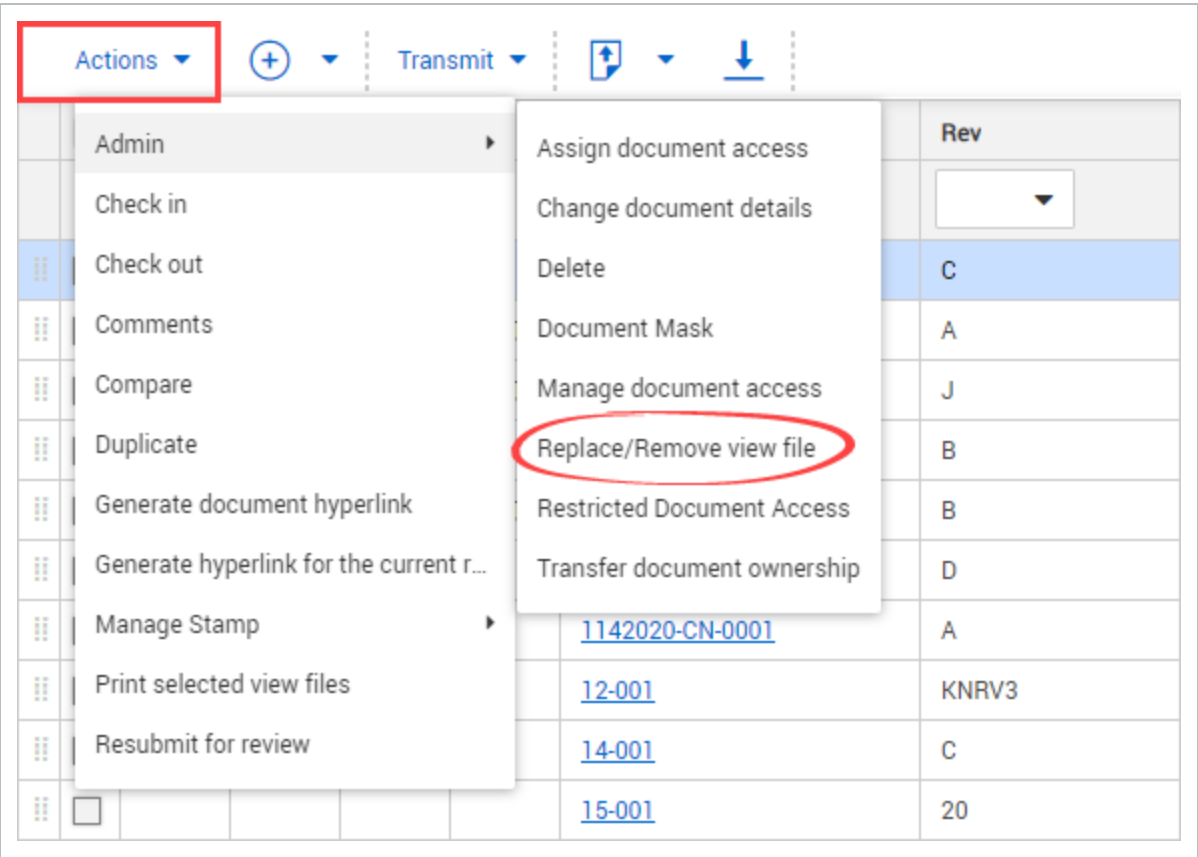
Cancel

Save

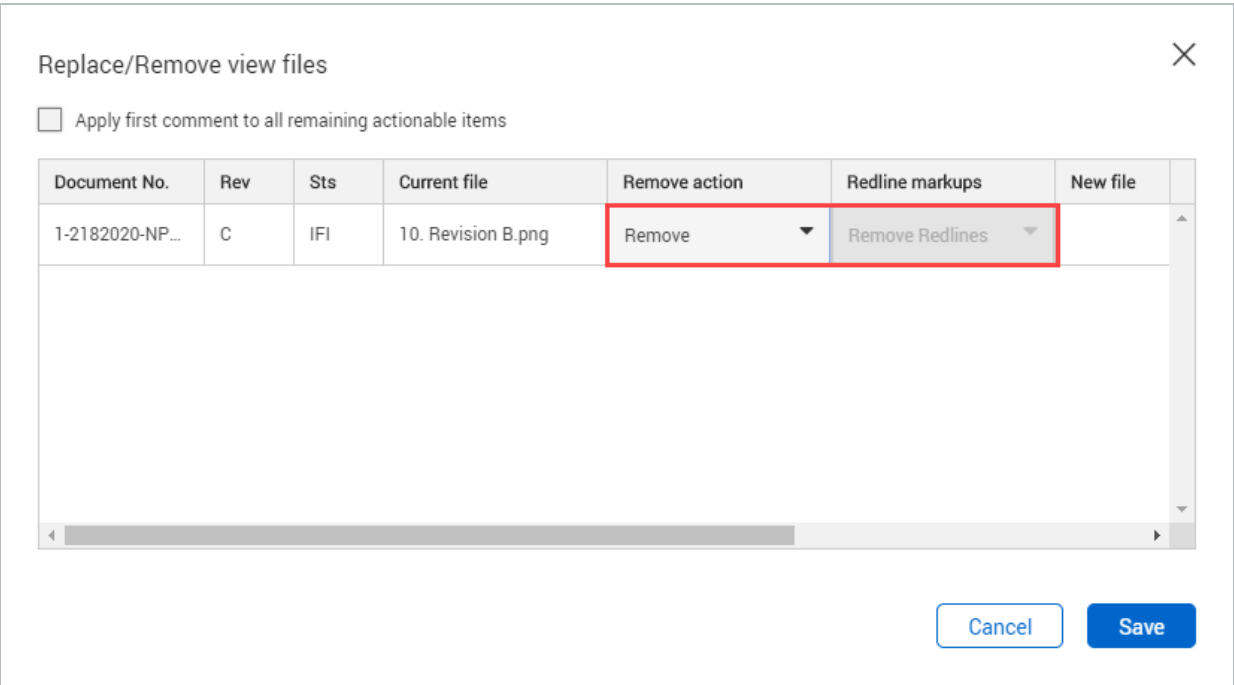
7. Click **Save**.

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:

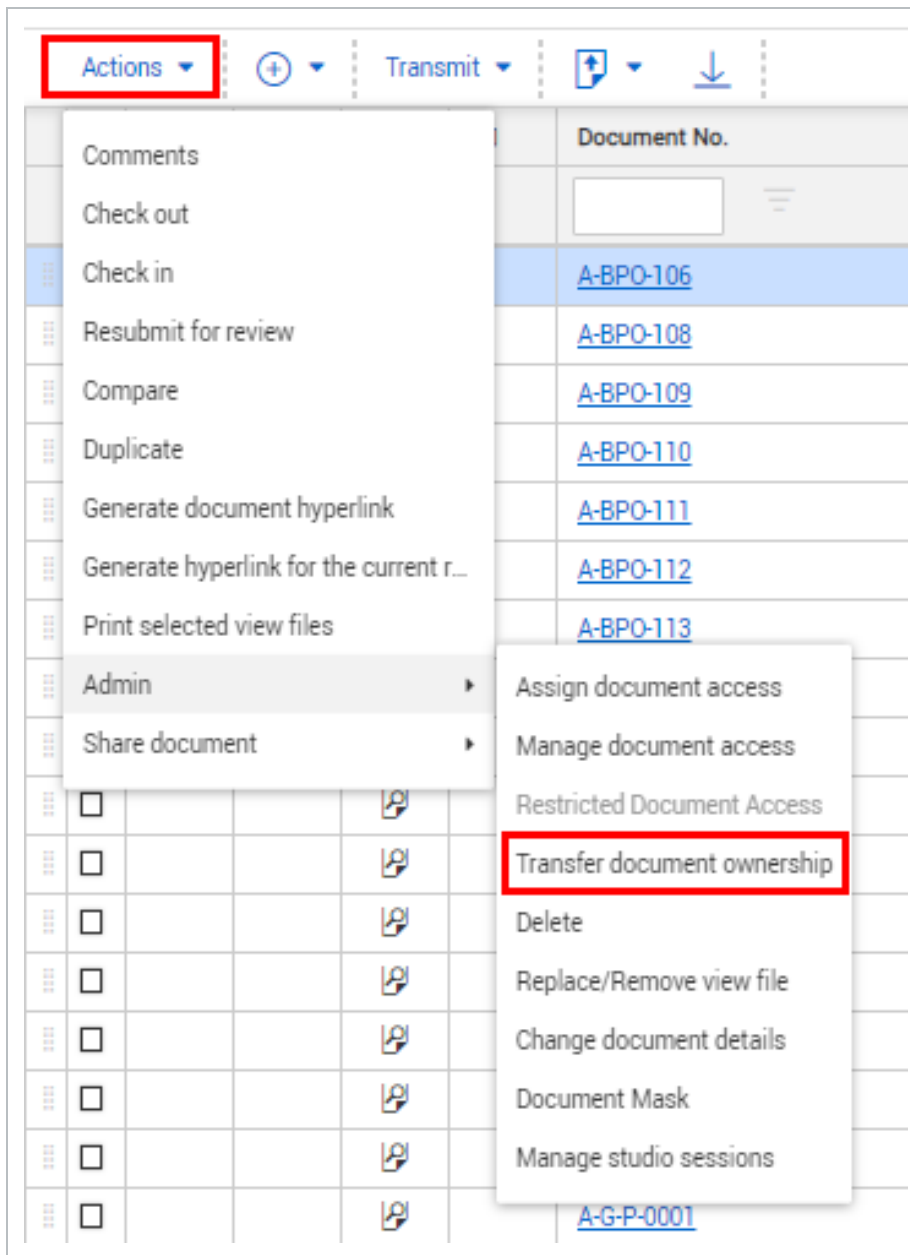
- Unrestrained.
- Restrained where the workflow has not been activated.
- Restrained documents awaiting release where the review type is single (not serial or parallel).

3.7 TRANSFERRING DOCUMENT OWNERSHIP

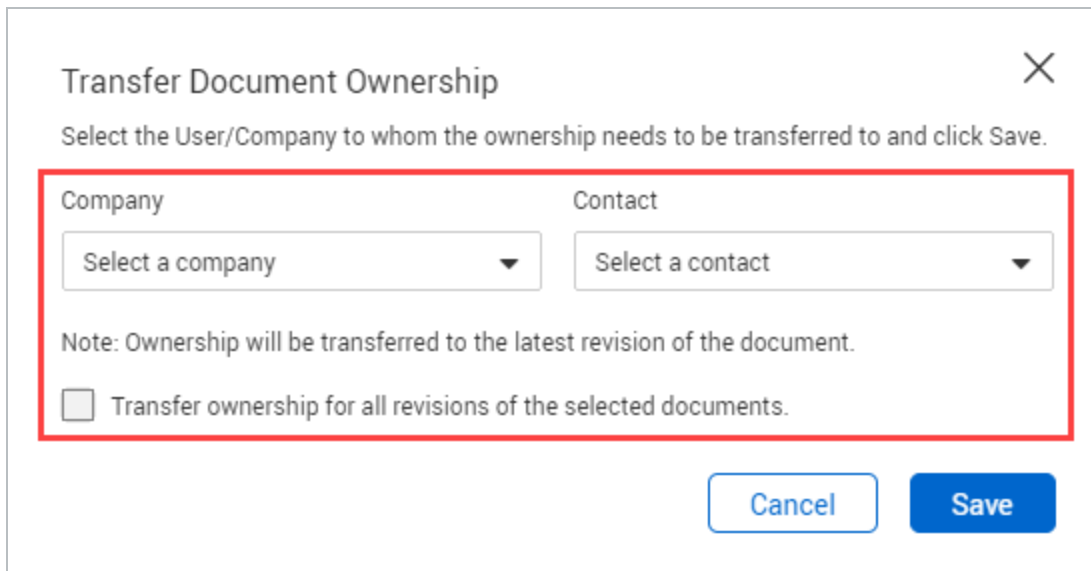
You might need to transfer document ownership to another company if they need to upload ongoing revisions. An example of this is when the early revisions of a document are uploaded on behalf of another company before a document controller is appointed.

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.



The image shows a 'Transfer Document Ownership' dialog box. It has a title bar with a close button (X). Below the title, it says 'Select the User/Company to whom the ownership needs to be transferred to and click Save.' There are two dropdown menus: 'Company' with the text 'Select a company' and 'Contact' with the text 'Select a contact'. Below these is a note: 'Note: Ownership will be transferred to the latest revision of the document.' There is a checkbox labeled 'Transfer ownership for all revisions of the selected documents.' At the bottom right are 'Cancel' and 'Save' buttons. A red rectangle highlights the area containing the dropdown menus, the note, and the checkbox.

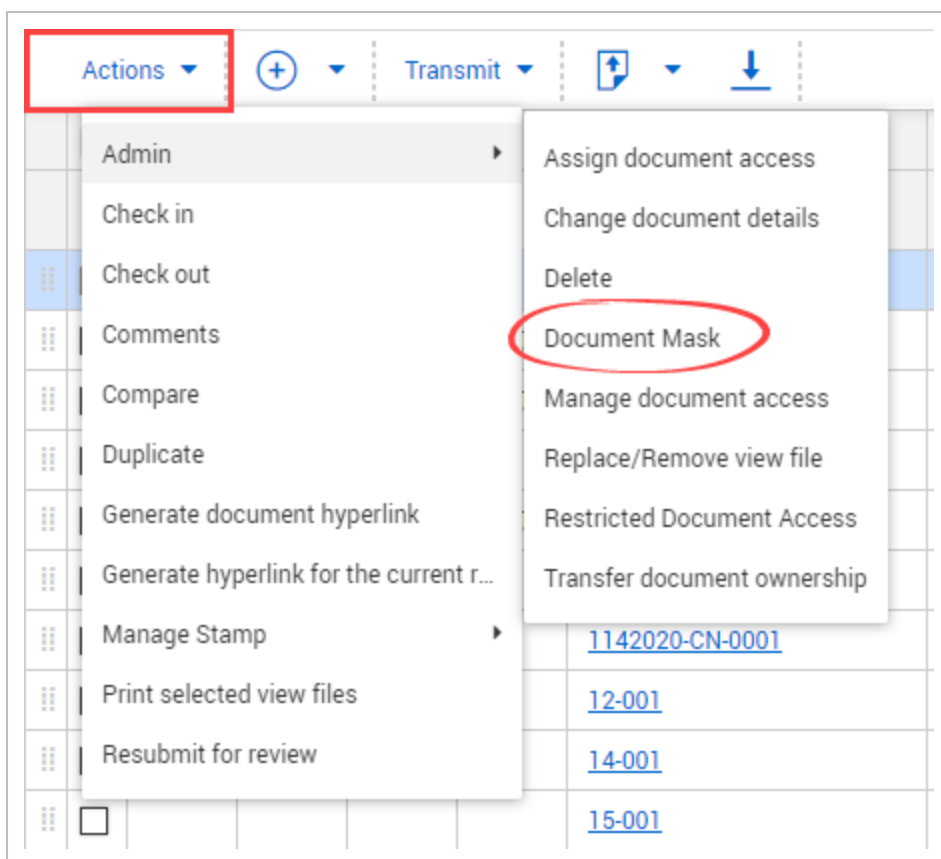
7. Click **Save**.

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.

Document Mask

×

Define one or more document masks to be used to validate the number of documents being uploaded to the Document Register.

Charaters defined by the document mask(s)

▼

Create a document number mask:

N

A

#

X

-

Other

Clear

+

Document masks created:

Document mask number

▲

▼

☐ Document Number length should be same as the document mask

Cancel

Save

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

NOTE

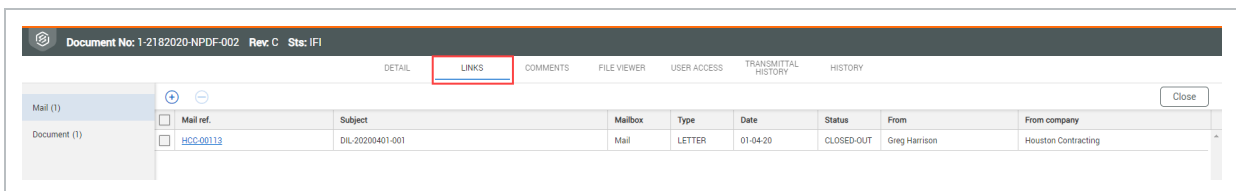
- To control the length of document numbers, select the **Document Number length should be the same as the document mask** check box.
- Use the **Other** button to define fixed characters as part of the document number. For example, to have the project number as the first 4 characters of all documents.
- 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.

Select the work items

Search criteria for Document

Show:

Latest unrestrainedDocuments that I can download

Filter by:

Column

Operator

Value

+AND

Select one...

Select one...

Select some items..

+AND

Select one...

Select one...

Select some items..

Clear

Search

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

Select the work items

Search criteria for Mail - Inbox

Show:

PersonalResponses: All mailNew mailOutstanding mail

To:

From:

Filter by:

Column

Operator

Value

Clear

Search

Search results

Enter in search criteria for results

Selected work items to link

Select one or more links from the search results

Cancel

Save

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

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Select the work items

Search criteria forMail - Inbox

Show:Personal

Responses:

All mailNew mailOut:

To:From:

ClearSearch

Search results

☐	Mail ref.	Received	Subject	To
☒	HCC-00118	08-04-20	hgj	Greg Harris
☐	HCC-00117	05-04-20	RE: Test	Greg Harris
☐	HCC-00116	05-04-20	777	Greg Harris
☐	00002.00	01-04-20	DIL-20200401-002	Greg Harris
☐	00001.01	31-03-20	RE: 11111111111111111111111111111111...	Greg Harris
☐	HCC-00112	31-03-20	RE: DIL-20200331-001	Greg Harris
☐	HCC-00003	27-03-20	FW: DIL-20200327-001	Greg Harris

Selected work items to link

Select one or more links from the search results

CancelSave

7. Click **Save**.

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

DETAILLINKSCOMMENTSFILE VIEWER

Mail (29)	+ - ↓	<table><tr><th>☒</th><th>Document No.</th><th>Title</th><th>Rev</th><th>Sts</th></tr><tr><td>☒</td><td>000000000</td><td>Testing PH - Vendor</td><td>A</td><td>test1</td></tr><tr><td>☒</td><td>0000000000000000000000000-11111111111</td><td>Testing long document number</td><td>A</td><td>IFI</td></tr><tr><td>☐</td><td>00000000-TA-1027-1131</td><td>Testing processing attachments-11/20zasd</td><td>B</td><td>IFI</td></tr><tr><td>☐</td><td>00000000-TA-1027-1132</td><td>Testing processing attachments-11/20zasd</td><td>B</td><td>IFI</td></tr><tr><td>☐</td><td>00000000-TA-1027-1134</td><td>Testing processing attachments-11/20zasd</td><td>B</td><td>IFI</td></tr></table>	☒	Document No.	Title	Rev	Sts	☒	000000000	Testing PH - Vendor	A	test1	☒	0000000000000000000000000-11111111111	Testing long document number	A	IFI	☐	00000000-TA-1027-1131	Testing processing attachments-11/20zasd	B	IFI	☐	00000000-TA-1027-1132	Testing processing attachments-11/20zasd	B	IFI	☐	00000000-TA-1027-1134	Testing processing attachments-11/20zasd	B	IFI
☒	Document No.	Title	Rev	Sts																												
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☒	0000000000000000000000000-11111111111	Testing long document number	A	IFI																												
☐	00000000-TA-1027-1131	Testing processing attachments-11/20zasd	B	IFI																												
☐	00000000-TA-1027-1132	Testing processing attachments-11/20zasd	B	IFI																												
☐	00000000-TA-1027-1134	Testing processing attachments-11/20zasd	B	IFI																												
Document (33)																																
Transmittal (4)																																
Form (7)																																
Gallery (58)																																

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.

Name	Company	Formats	Last Access ...	Last Do...	Access ...	Details
ABC BC	Houston Contracting	PDF	21-01-20		Transmitt...	
ABC BC	Houston Contracting	DOC	21-01-20		Transmitt...	
ABC BC	Houston Contracting	OTHER	21-01-20		Transmitt...	
ABC BCD	QA Software Pty Ltd	PDF	28-11-19		Transmitt...	
ABC BCD	QA Software Pty Ltd	DOC	28-11-19		Transmitt...	
ABC BCD	QA Software Pty Ltd	OTHER	28-11-19		Transmitt...	
Adam Jones	Houston Contracting	PDF	17-01-20		Transmitt...	
Adam Jones	Houston Contracting	DOC	17-01-20		Transmitt...	
Adam Jones	Houston Contracting	OTHER	17-01-20		Transmitt...	
Adam Smith	KM1 Company	PDF	11-03-20		Packages	Pkg No: CN-GHA-311-PKG-001 Title: CN-GHA-311-PKG-001-title

Items: 337

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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.

Date	Event Type	Action By	Description	Notification Details
25-11-19 10:35 PM	Document Uploaded	shanik,a perera (titan)	More Information ⋮	
25-11-19 10:35 PM	View Document Details	shanik,a perera (titan)		
25-11-19 10:36 PM	Document Revised	shanik,a perera (titan)	More Information ⋮	
25-11-19 10:36 PM	View Document Details	shanik,a perera (titan)		
25-11-19 10:36 PM	View Document Details	shanik,a perera (titan)		
25-11-19 10:43 PM	Recipient Company Docum...	shanik,a perera (titan)	Access granted to Transmittal recipient company ...	
25-11-19 10:46 PM	Recipient Company Docum...	shanik,a perera (titan)	Access granted to Transmittal recipient company ...	
27-11-19 06:24 PM	Transmittal Sent	Greg Harrison (Houston ...	More Information ⋮	
27-11-19 06:24 PM	Transmittal Document Acce...	Greg Harrison (Houston ...	Access granted to Transmittal recipients ⋮	
27-11-19 06:24 PM	Recipient Company Docum...	Greg Harrison (Houston ...	Access granted to Transmittal recipient company ...	

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.


Document No: TC-MANREVIEW-14012020 **Rev:** A **Sts:** IFC

DETAIL LINKS COMMENTS FILE VIEWER USER ACCESS **REVIEW STATUS** TRANSMITTAL HISTORY HISTORY

Close

Review status
 Released

Review coordinator details

Name:	Joe Fredericks	Total days left:	0	Notes:
Company:	Houston Contracting	Scheduled completion:	01-02-21	
Total days scheduled:	2	Actual completion:	05-05-21	
Total days to-date:	65			

Reviewer details

Location of review 

Reviewer name	Reviewer company	Se...	Total days schedul...	Total days to-d...	Total days l...	Scheduled completion	
Adrian Hinkley	Engineering Project Services	1	2	0	0	19-01-21	▲
George Robinson	Engineering Project Services	2	2	8	0	19-01-21	



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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

[illegible]

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.

Document No: 1126-CN-002 Rev: B Sts: IFI

DETAIL LINKS COMMENTS FILE VIEWER USER ACCESS **TRANSMITTAL HISTORY** HISTORY

Close

^ Incoming Transmittals Latest

Recipient	Company	Package	Transmittal No.	Rev	Version
Greg Harrison	Houston Contracting		TRAINING01-DES0010	B	B.01
chathuranga wijesinghe	Houston Contracting	CN_HDOC-1232020-0002	HCC-000215	B	B.01
ABC BC	Houston Contracting	CN-221_SP-0003	TITAN-000032	B	B.01

^ Sent Transmittals Latest

Recipient	Company	Package	Transmittal No.	Rev	Version
Asela Goonatilleke	QA Software Pty Ltd		TRAINING01-DES0025	B	B.01
Nadee Kotuwegedara	QA Software Pty Ltd		TRAINING01-DES0025	B	B.01
Greg Harrison	Houston Contracting		TRAINING01-DES0010	B	B.01

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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.

Manage columns

Manage existing

Create new

View selection:

Company View2

Available columns

Column name	Alternative name
-------------	------------------

Allocated columns

	Column name	Alternative name	
	Comment level	Comment level	
	Attach	Attach	
	Item	Item	
	Date	Date	
	Rev	Rev	
	Sts	Sts	
	Raised by	Raised by	

Reset all to default

Cancel

Save

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

[illegible]

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.

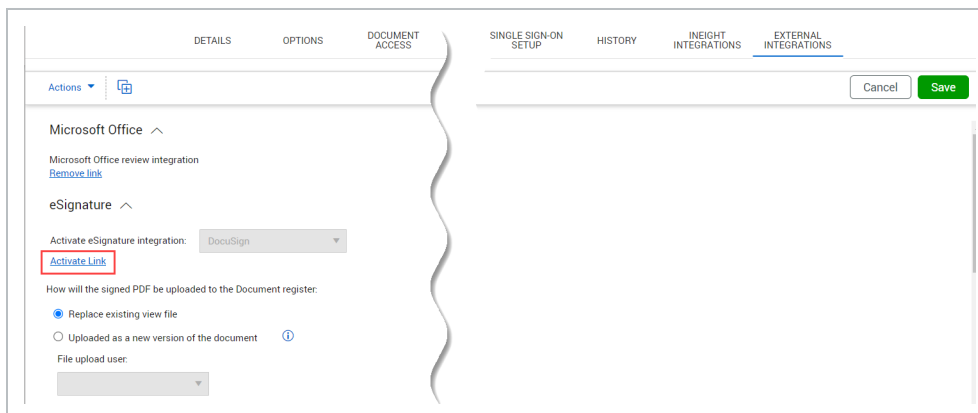
You must be the administrator or a relevant user of the company to set up the integration, so the integration can rely on the company's eSignature subscription.

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.

The screenshot shows the 'eSignature' integration setup interface. A modal window titled 'Default attributes' is open, allowing configuration of document metadata. The modal includes dropdown menus for Revision, Status, Discipline, Type, and Category, as well as text input fields for Sender company, Sender, Area, Revision notes, and Remarks. A red arrow points from a link in the background interface to this modal. The background interface shows options for how the signed PDF is uploaded (Replace existing view file or Uploaded as a new version of the document) and how the history file is handled (No history file or As a new document and linked to the original document). A link at the bottom of the background interface reads: '* Click to define the default metadata for documents containing history file'.

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 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.

Send for signature

Document No: TS-07032024-0011
Document title: TS-06032024-0011

1 — 2 — 3
Signature role name Add notification Preview document

Defined role names dictate who will receive an email to sign the document. Additional role names can be added or removed as needed.
Signing order can be assigned based on the order of needed signatures.

☐	Signature role name	Company	User name	Email	Signing order	Signature location	Action
☐	Contract Mana...	Houston Contracting	Tyler Ellerbeck	tyler.ellerbeck@ineig...	1	Defined in step 3	Defined in step 3
☐	Project Manager	Houston Contracting	Ben Hopgood	ben.hopgood@ineigh...	2	Defined in step 3	Defined in step 3

Cancel Next

- 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.

The screenshot displays the 'Add notification' step in the eSignature solution. The top bar shows the document title 'Crossroads Project Contract Documents' and a 'PREVIEW' button. A dropdown menu lists roles: Ben, Tyler, and Ben. The main area shows a document preview with signature lines for 'Vendor Contract', 'Project Manager Signature', and 'Contract Manager Signature'. The left sidebar lists 'Standard Fields' like Signature, Initial, Date Signed, Name, Email, Company, Title, Text, and Number. The right sidebar shows configuration options for the signature field, including Recipient (Ben Hopgood), Required Field, Formatting, Data Label, Tooltip, and Location. At the bottom, there are buttons for 'SAVE AS CUSTOM FIELD', 'DELETE', and 'SEND'.

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.



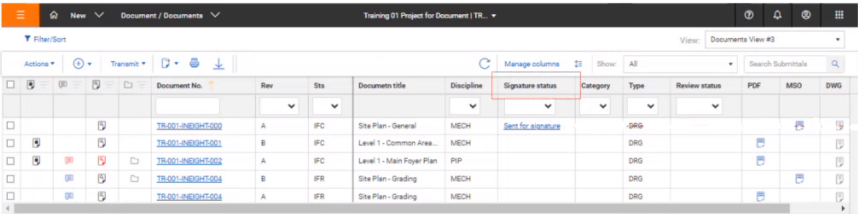
If the signature process has failed, the eSignature solution sends a failure notification.

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.



DETAIL

LINKS

COMMENTS

FILE VIEWER

USER ACCESS

TRANSMITTAL HISTORY

HISTORY

SIGNATURE STATUS

Close

Signature status

Date sent for signature: 13-03-24

Signature status: Sent

Signature initiator: Greg Harrison

Signature integration: Houston Contracting

Company	Name	Date completed	Signee status	Signing order
Houston Contracting	Tyler		Sent	1
Houston Contracting	Ben		Sent	2

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.

This page intentionally left blank.

CHAPTER 4 – APPLYING DOCUMENT ADMINISTRATION SETTINGS

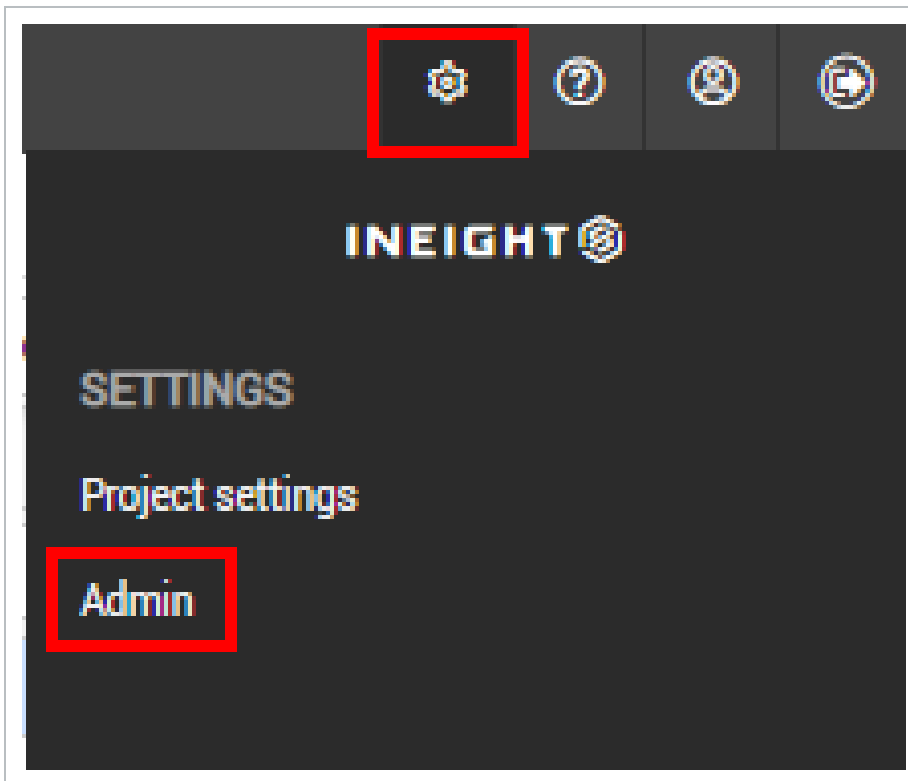
You can view apply different administration settings to documents in the Documents Register. See the links below for information on applying document administration settings.

4.1 DEFINING DOCUMENT UPLOAD RULES

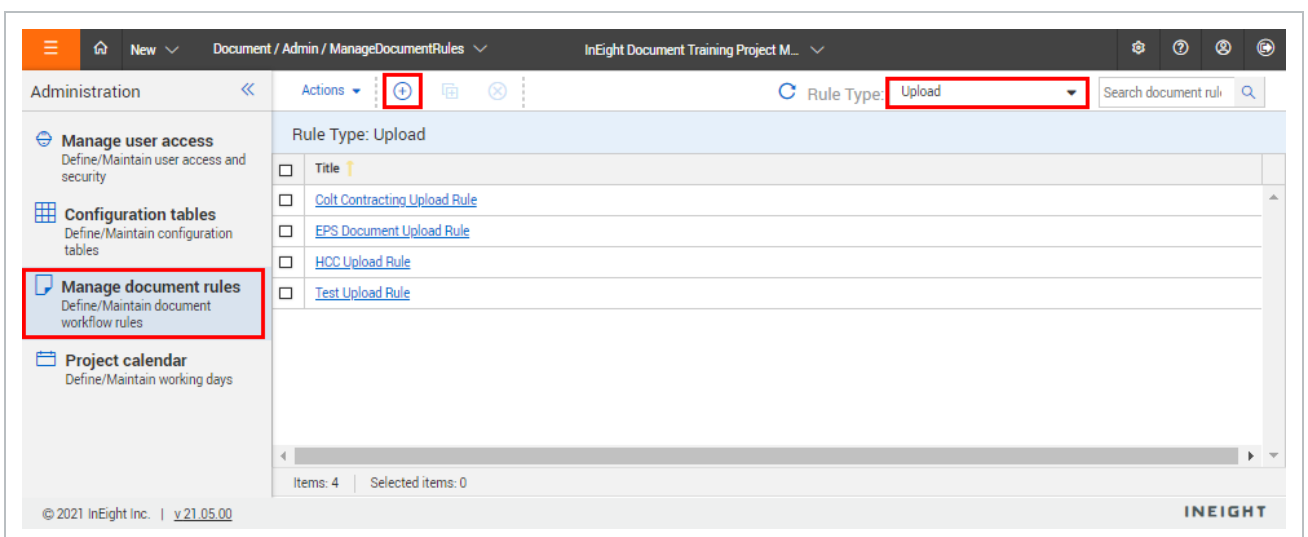
InEight Document controls who can upload documents to the system by a flexible system of document rules. Upload rules are defined in terms of key document attributes and companies are allocated to one or more rule sets. This means they can only upload documents that conform to the rule set they have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

Upload - New Rule

DETAILS ALLOCATIONS HOLDING AREA FIELDS HISTORY

Cancel Duplicate **Save**

*Title:

☐ Upload document to Holding Area

Field selection: ☐ Show Selected Only

Status ☐ Select All

Search sts

- ☐ Any
- ☐ Accepted for Construction
- ☐ As Built
- ☐ Detailed Design
- ☐ Issued for Approval
- ☐ Issued for Construction
- ☐ Issued for Information
- ☐ Issued for Review
- ☐ Issued for Tender
- ☐ Issued for Use
- ☐ Preliminary Design

Discipline ☐ Select All

Search discipline

- ☐ Any
- ☐ Administration
- ☐ Architectural
- ☐ Civil
- ☐ Electrical
- ☐ Fire Systems
- ☐ Geotechnical
- ☐ Instrumentation
- ☐ Landscape
- ☐ Lifts & Escalators
- ☐ Mechanical
- ☐ Plumbing

Category ☐ Select All

Search category

- ☐ Any
- ☐ Cable Schedules
- ☐ General Arrangements
- ☐ Isometrics
- ☐ Piping and Instrument Drawings
- ☐ Plans & Elevations
- ☐ Plot Plans
- ☐ Route & Profile drawings

Type ☐ Select All

Search type

- ☐ Any
- ☐ Certificate
- ☐ Contract
- ☐ Drawing
- ☐ Drawing-Shop
- ☐ Drawing-Sketch
- ☐ Image
- ☐ Manual
- ☐ Model
- ☐ Plan
- ☐ Procedure
- ☐ Register/List

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

Upload - New Rule

DETAILS **ALLOCATIONS** HOLDING AREA FIELDS HISTORY

Cancel Duplicate Save

Display: ☒ User ☐ Department ☐ Company

Select companies, departments and users to allocate

Colt Contracting Search

☐	Name
☒	Amy Sanders
☐	Gina Jones
☐	Jacob Palmer
☐	Jean Black
☐	Ray Colt
☐	Rose Drake
☐	Terry Johnson

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

Search

Company	Department	Name
No records to display		

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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.

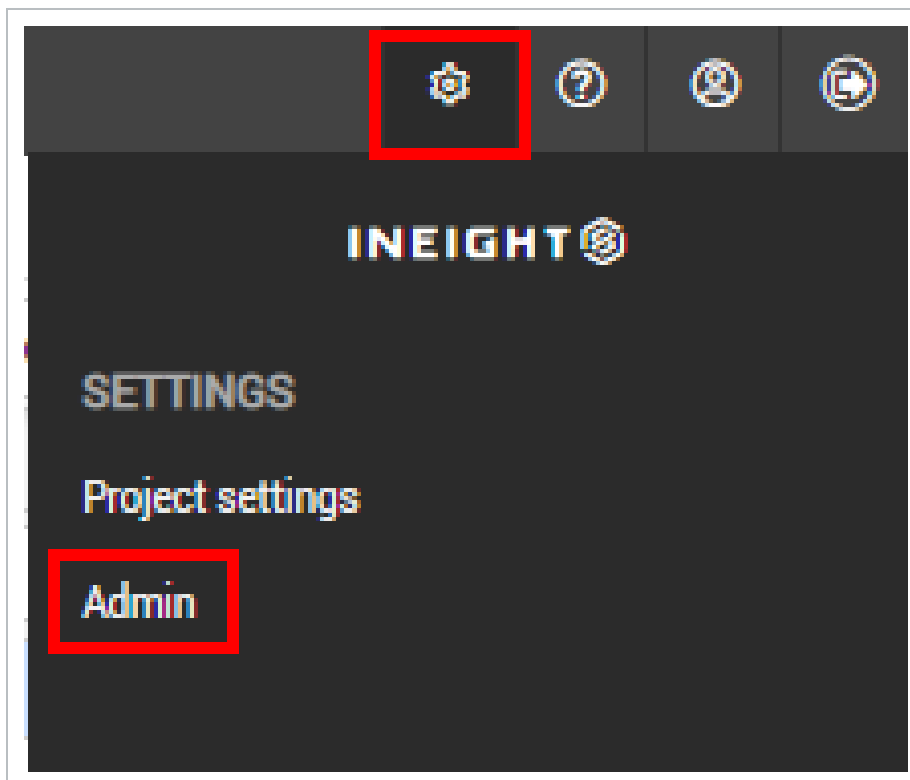
4.2 DEFINING DOCUMENT DISTRIBUTION RULES

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

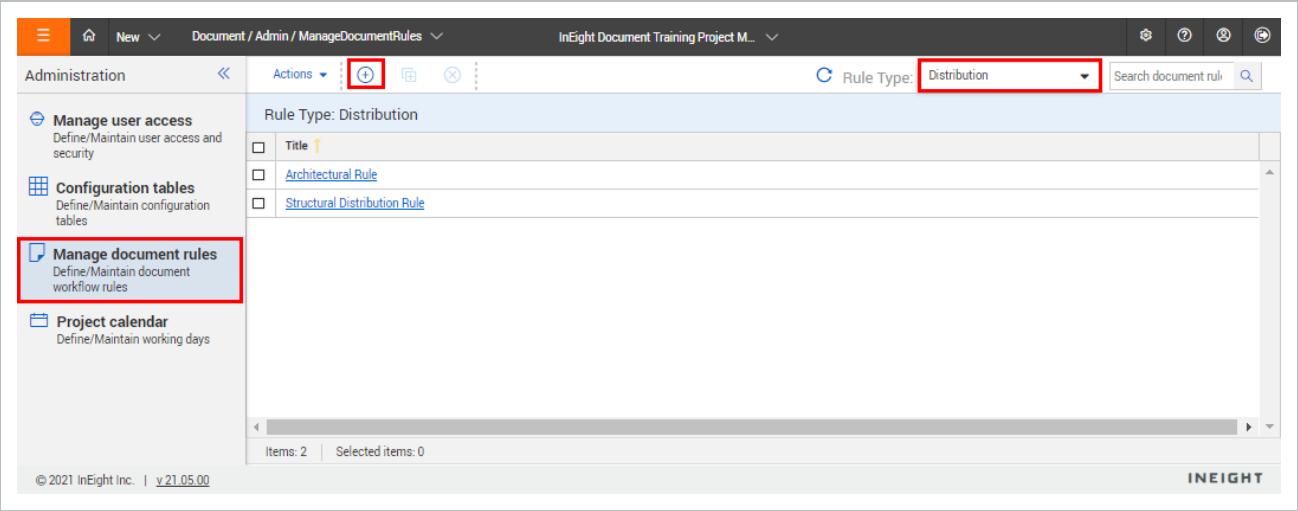
1. The **default distribution** for unrestrained documents.
2. The format(s) of the documents each person on the distribution can download.
3. A user included in a **distribution rule** set will automatically be notified when documents meeting the rule-based criteria of the group are released in InEight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

4.2.1 TO DEFINE DOCUMENT DISTRIBUTION RULES:

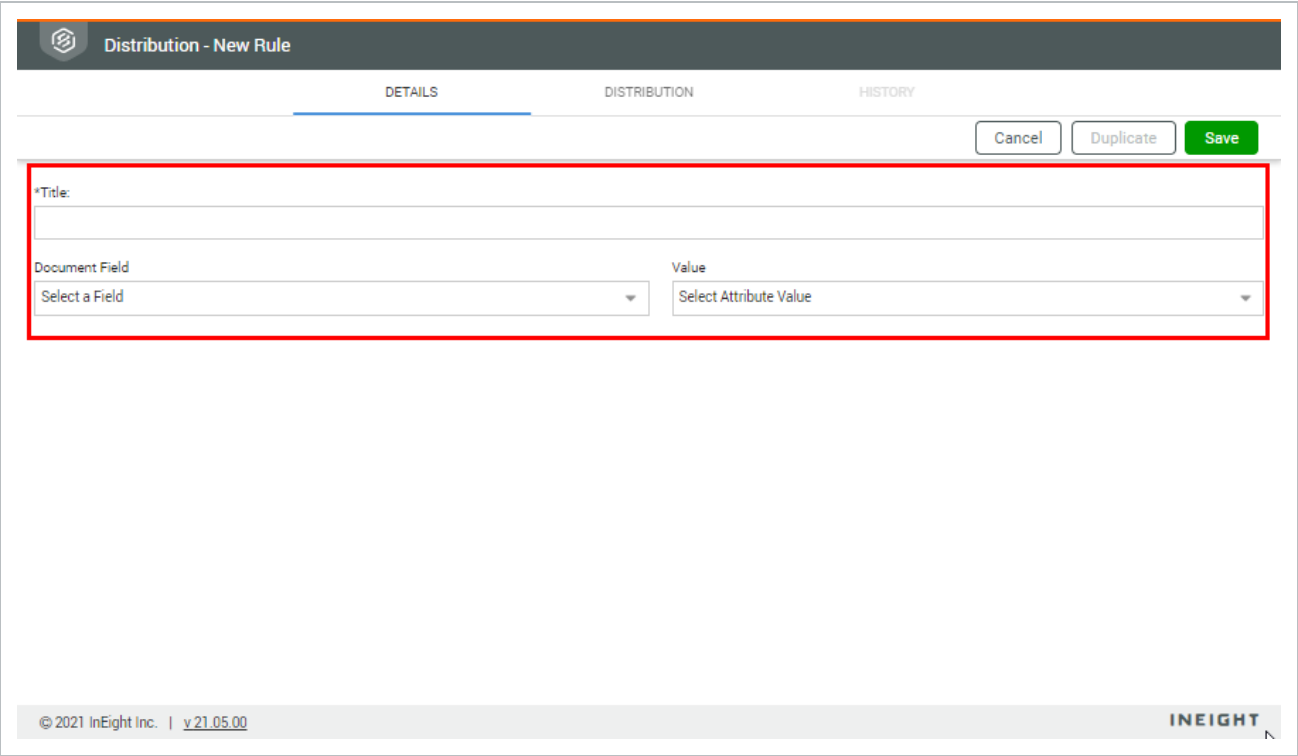
1. Click the **cogwheel icon** and select **Admin**.



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**.

Distribution - New Rule

DETAILS

DISTRIBUTION

HISTORY

Cancel

Duplicate

Save

Select contacts to allocate

Colt Contracting

Search

☐

Name

☐ Amy Sanders

☒ Gina Jones

☐ Jacob Palmer

☐ Jean Black

☐ Nabil Hassan

☐ Ray Colt

☐ Rose Drake

☐ Terry Johnson

→

Allocated contacts

Clear allocated

Search

Name	Company	PDF	DWG	DOC	OTHER	Access
No records to display						

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INEIGHT

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

Allocated contacts [Clear allocated](#)

Name	Company	PDF	DWG	DOC	OTHER	Access From	Notify
Gina Jones	Colt Contracting	☒	☒	☒	☒	01-01-2000	☒

INEIGHT

10. Click **Save**.

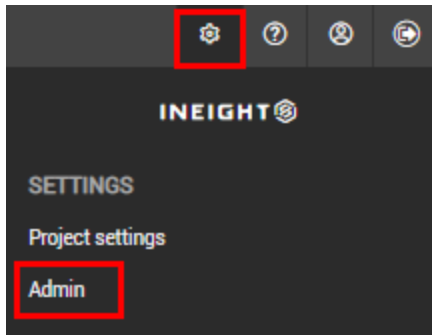
NOTE

- 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.

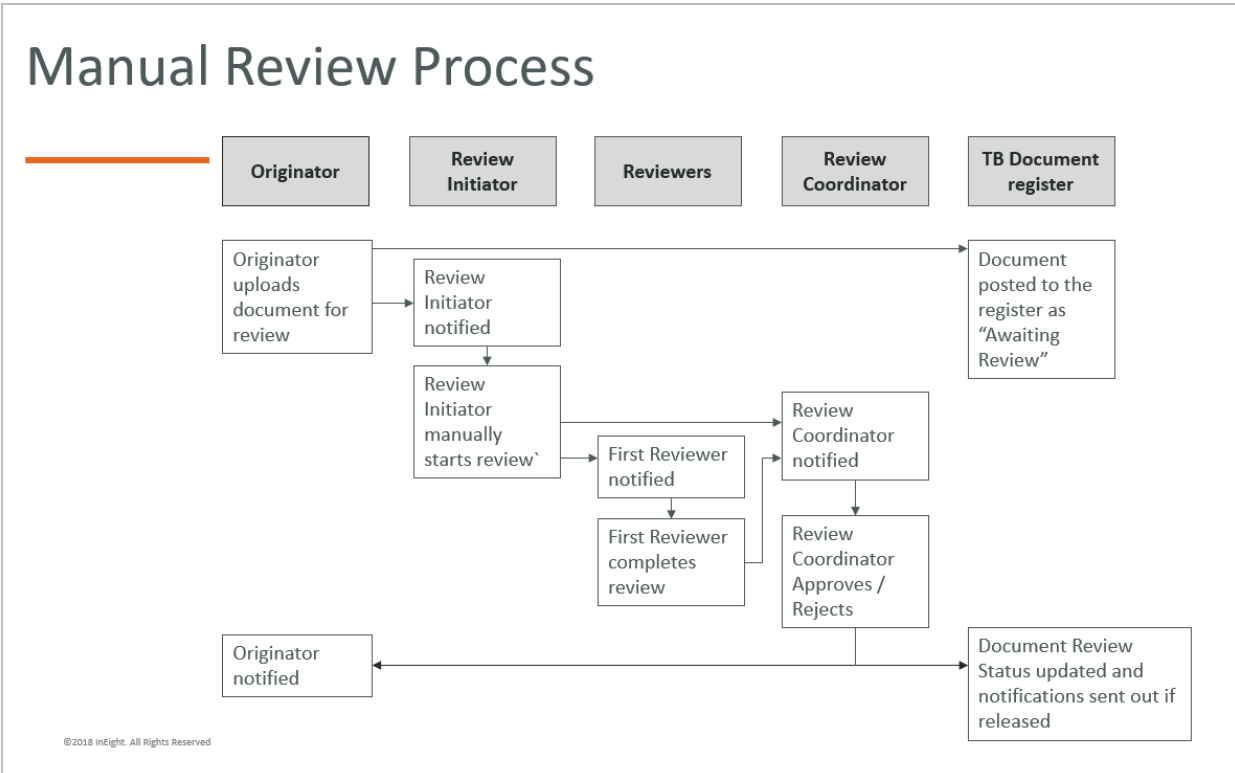
5.1 OVERVIEW

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-

¹To 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).

New document

DETAIL

Actions Check out Change document details Cancel Save

Files

No file has been selected. Please select a file to preview.

[Attach files](#)

File name	Extension	Size	Status
Site Plan.pdf	pdf	660 KB	

* Document No. QAS-PLAN-L1-004

* Title Site Plan

* Revision A - Rev A

* Status IFR - Issued for Review

* Discipline ARC - Architectural

* Type DRG - Drawing

Category Select one

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

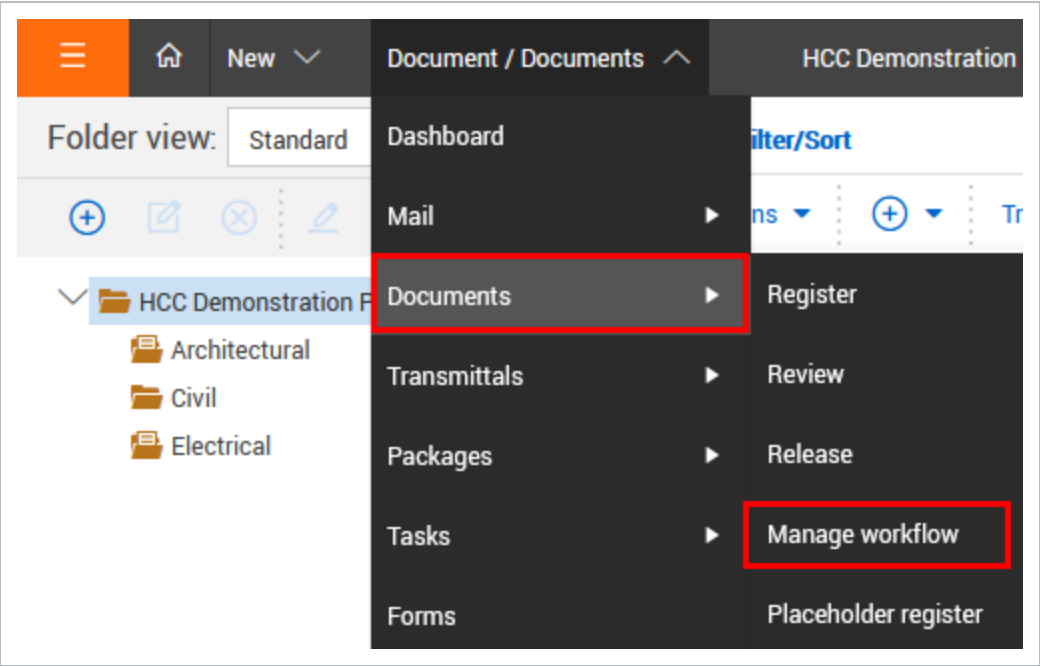
The Review Initiator can activate the manual workflow to the default review team which can be edited as required.

ACTIVATE A DEFAULT REVIEW

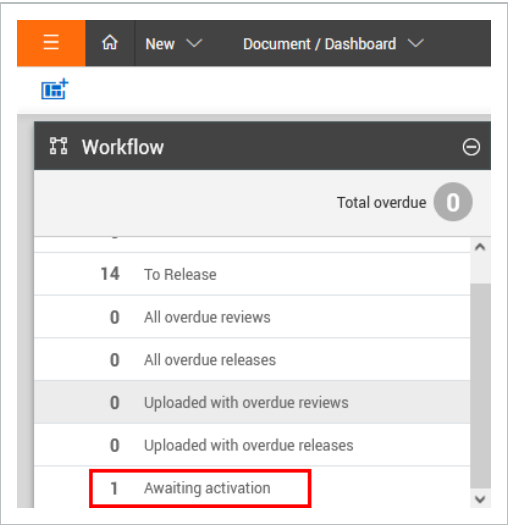
Summary: Activate a default workflow to select a predefined group of reviewers that will review one or more documents.

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**.

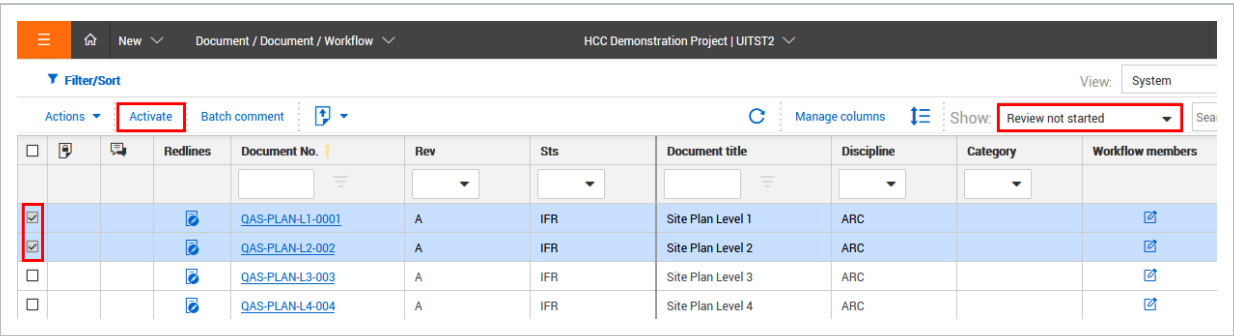


Alternatively, from the Dashboard Workflow tile, select **Awaiting activation**.



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.

Activate review

* Review type for the available document(s).

Document

* Review session ID

AUTO

* Review session name

AUTO

The workflow for the selected documents will now be activated. Please select either options below to continue.

☒ Default workflow

☐ Custom workflow

Cancel

Initiate Review

- 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.

Review workflow has been activated for the selected documents.

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.

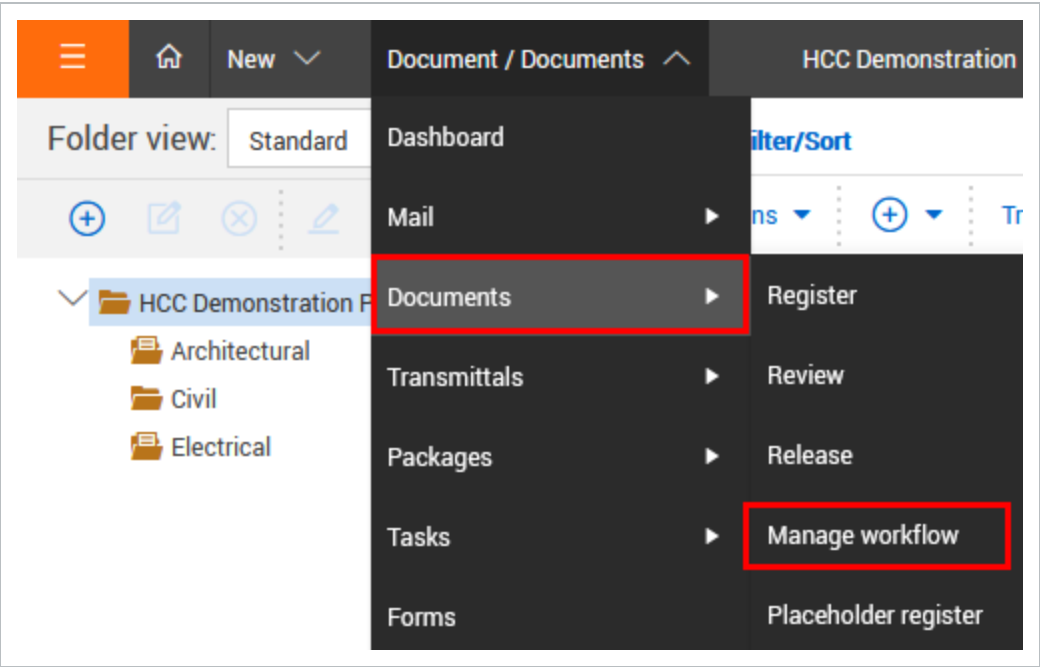
5.4 ACTIVATING A CUSTOM WORKFLOW

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.

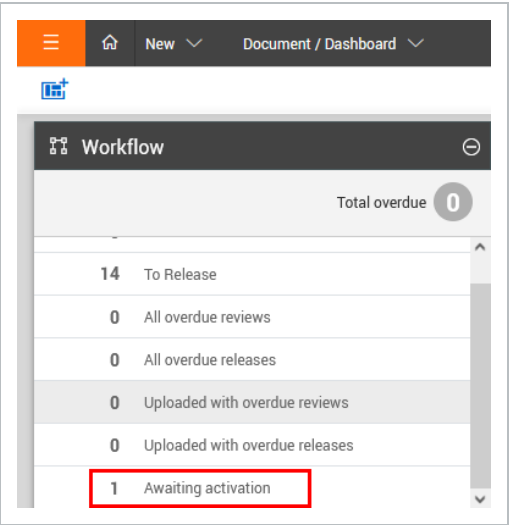
ACTIVATE A CUSTOM WORKFLOW

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.

New

Document / Document / Workflow

HCC Demonstration Project | UITST2

Filter/Sort

View: System

Actions

Activate

Batch comment

Manage columns

Show: Review not started

Search

	Redlines	Document No.	Rev	Sts	Document title	Discipline	Category	Workflow members
☒		QAS-PLAN-L1-0001	A	IFR	Site Plan Level 1	ARC		
☒		QAS-PLAN-L2-002	A	IFR	Site Plan Level 2	ARC		
☐		QAS-PLAN-L3-003	A	IFR	Site Plan Level 3	ARC		
☐		QAS-PLAN-L4-004	A	IFR	Site Plan Level 4	ARC		

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**.

Activate review

* Review type for the available document(s)

Document

* Review session ID

AUTO

* Review session name

AUTO

The workflow for the selected documents will now be activated. Please select either options below to continue.

☒ Default workflow

☐ Custom workflow

Cancel

Initiate Review

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.

Activate Review

* Review type for the available document(s).
Select one

* Review ID
*

* Review session name

The workflow for the selected document(s) will now be activated. Please select either options below to continue.

☐ Default workflow ☒ Custom workflow

*Document review coordinator: ☒ User ☐ Role

*Document review coordinator company: *Document review coordinator contact: Total review duration in (input) days

Display:
☒ All users ☐ Roles ☐ Free form review teams

Select contacts to allocate

Select a company Search all contacts...

Name
☐ Ryan Peter

Allocated contacts, roles and free form review teams

Search allocated...

Name	Company	Due date	Sequence	Duration (
Ryan Peter	QA Software Pty Ltd		0	

Cancel Initiate Review

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.

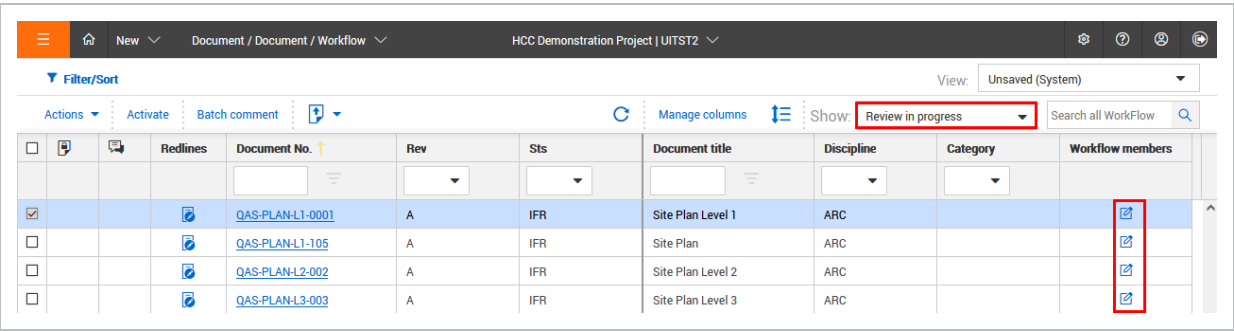
MODIFY AN IN-PROGRESS WORKFLOW

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

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

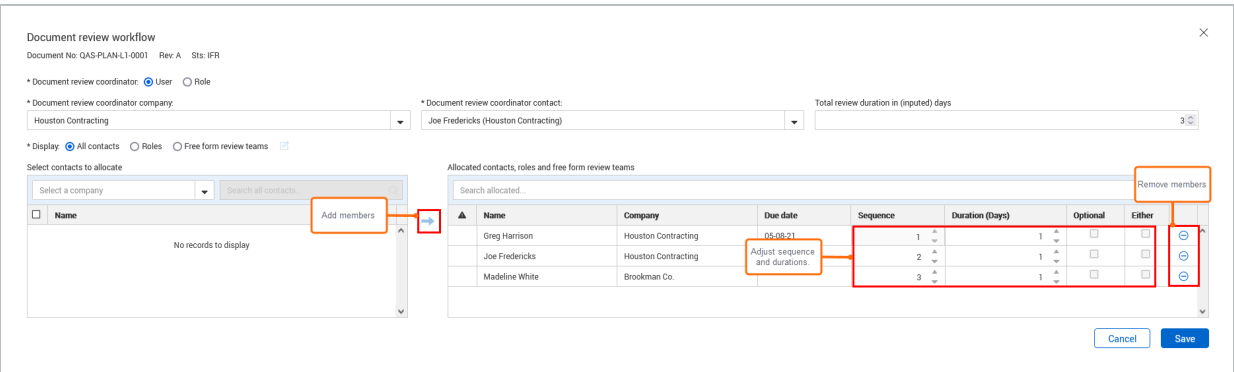
Document Workflow page opens.

- 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.

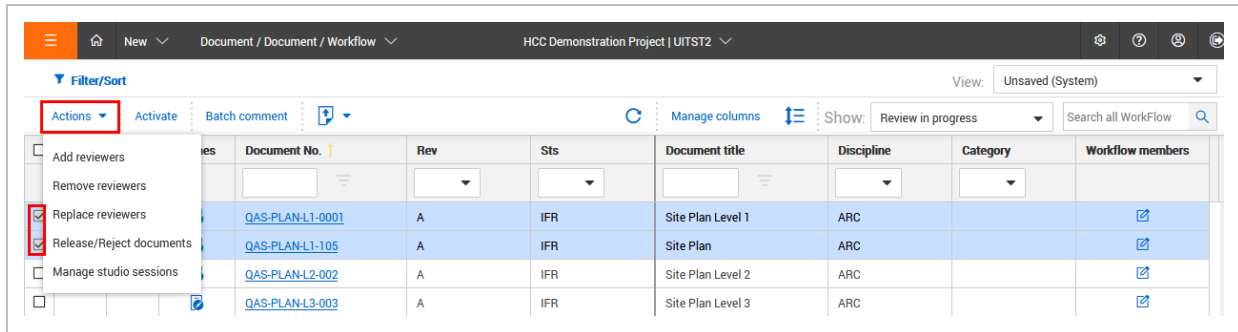


- 6. Click **Save**.

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.

Document review workflow

Document No: TS-01122022-0004 Rev: C Sts: AB

* Document review coordinator: ☒ User ☐ Role

* Document review coordinator company: * Document review coordinator contact: Total review duration in (inputted) days:

1

Display: ☒ All users ☐ Roles ☐ Free form review teams

Select contacts to allocate

Select a company

Search all contacts...

No records to display

→

Allocated contacts, roles and free form review teams

Search allocated...

Name	Company	Due date	Sequence	Duration (days)	Optional	Reactivate
		04-12-22	1	1	☐	☐
		02-12-22	1	1	☐	☐

Cancel

Save

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.

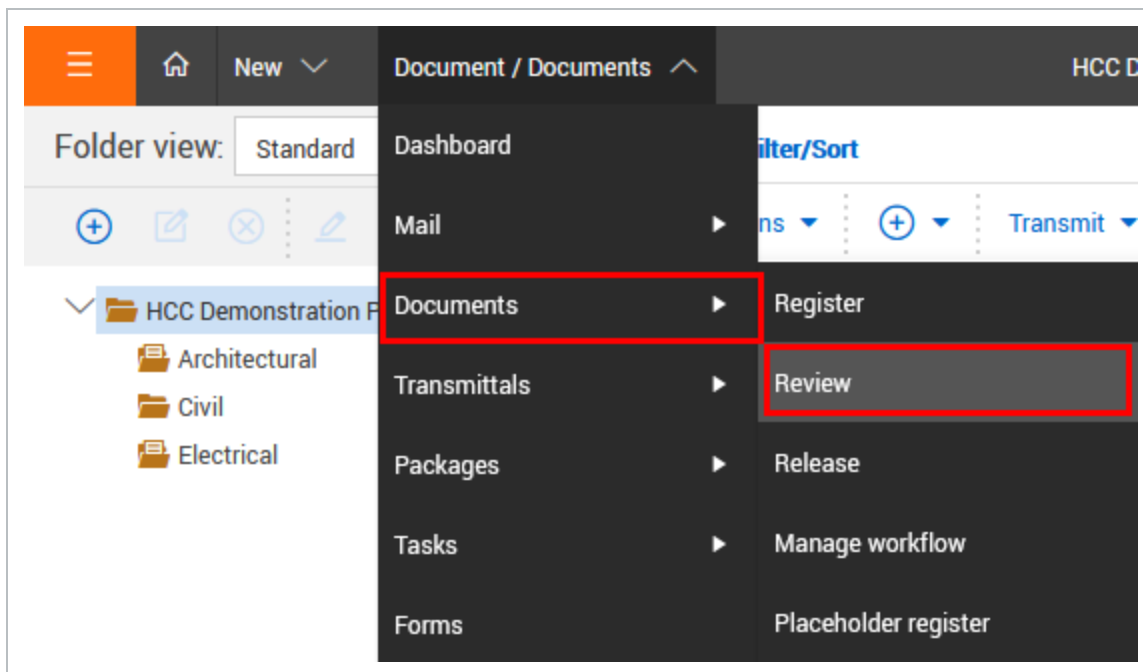
REVIEW A DOCUMENT

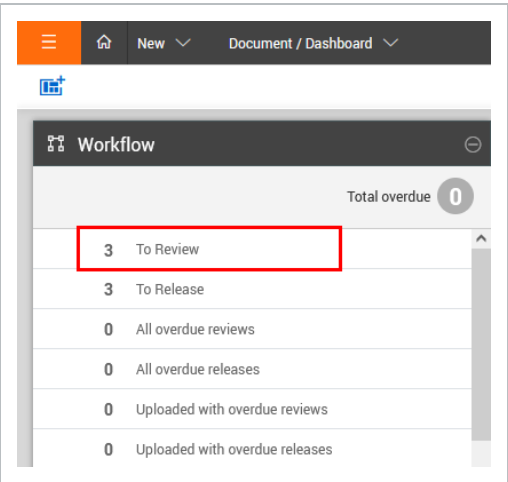
Summary: You can review documents assigned to you from the document review screen.

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.

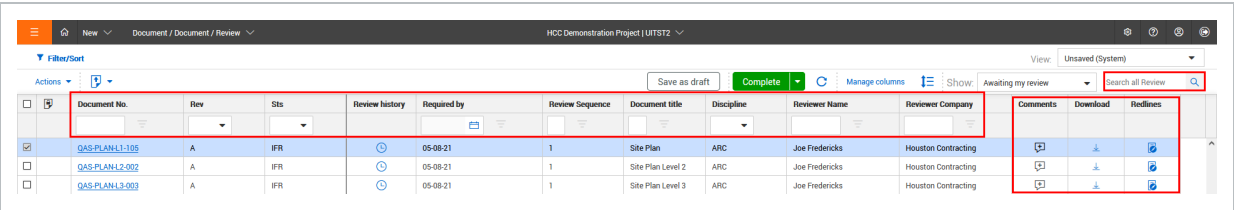
1. From the **Module Menu**, hover over **Documents** and select **Review**. Alternatively use the hyperlink in the **Workflow** Widget on the Dashboard .





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.

Document No: QAS-PLAN-L1-105 Rev A Sts: IFR														
DETAIL LINKS COMMENTS FILE VIEWER USER ACCESS REVIEW STATUS TRANSMITTAL HISTORY														
Comment level	Item	Date	Rev	Sts	Raised by	Raised by company	Commented ..	Commented by company	Comments	Annotation type	File Name	Category	Closed out	
☐		01	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Review of measure...		Major	☐	

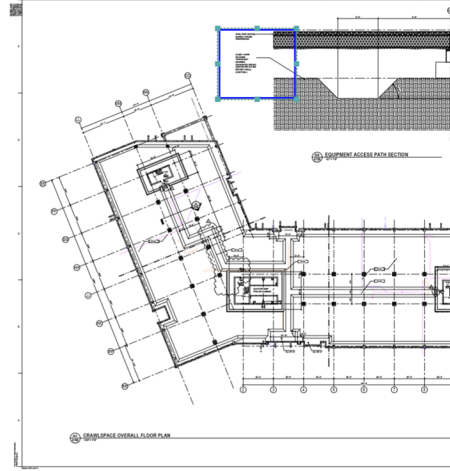
To add a response to an existing comment, right-click on the annotation, and then click **Add Response**. Alternatively, you can click the **Comments** icon to open the Comments and Annotations panel, and then click **Add Response**.

File names: PDF - 104093-RG-ARC-00...
Compare Select one
Previous Document Next Document

Comments & Annotations
Display only filtered Annotations Reset filters

Annotation No: #A03 Page 1
Commented by - Commented by company: Mandy Becker - INEIGHT
Commented date: 06-19-25 09:56 am
Available to: All Close out
Comments:
Tags
Add Response

Viewing tools Markup Measure
Zoom In Square
TOC



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

 New Comment

* Comments

Plain Text

Arial13 pxA

BBIU

* Category:

Major

Raised by company

Select one...

Raised by

Select one...

Attach files:

 Attach files

 Download all

 Download selected

There are no attachments uploaded.

Items: 0

Cancel

Save

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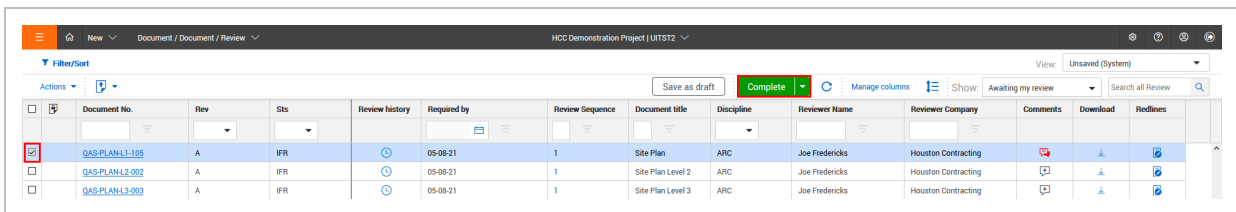
INEIGHT

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.

HCC Demonstration Project UTS12												
Filter/Sort												
Actions												
	Document No.	Rev	Sits	Review history	Required by	Review Sequence	Document title	Discipline	Reviewer Name	Reviewer Company	Comments	Download
☒	QAS-PLAN-1.105	A	IFR		05-08-21	1	Site Plan	ARC	Joe Fredericks	Houston Contracting		
☐	QAS-PLAN-1.2.002	A	IFR		05-08-21	1	Site Plan Level 2	ARC	Joe Fredericks	Houston Contracting		
☐	QAS-PLAN-1.3.003	A	IFR		05-08-21	1	Site Plan Level 3	ARC	Joe Fredericks	Houston Contracting		

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

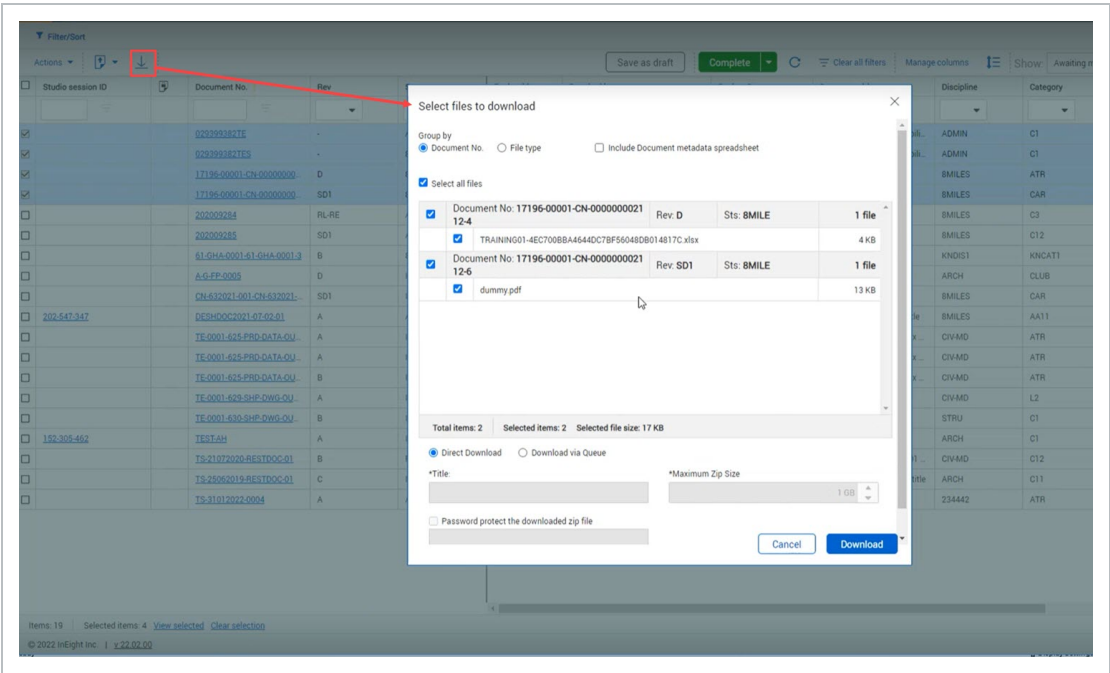
To bypass the workflow process, a reviewer can select Complete > **Send to review coordinator** from the Document Review page. When this option is selected, Document Completes the workflow process and passes control of the document to the review coordinator, bypassing all other reviewers who have not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

↑ Sts ×						
☐		Document No. ↑	Rev	Sts	Review status	Review history
▼ Sts: IFC						
☐		A-G-FP-0005	D	IFC		
▼ Sts: IFR						
☐		CN-632021-001-CN-632021-...	SD1	IFR		
☐		TE-0001-625-PRD-DATA-OU...	A	IFR		
☐		TE-0001-625-PRD-DATA-OU...	A	IFR		
☐		TE-0001-625-PRD-DATA-OU...	B	IFR		
☐		TE-0001-629-SHP-DWG-OU...	A	IFR		
☐		TE-0001-630-SHP-DWG-OU...	B	IFR		

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.

↑ Sts ×		↑ Discipline ×				
	☐		Document No. ↑	Rev	Sts	Review status
▼ Sts: IFC						
▼ Discipline: ARCH						
	☐		A-G-FP-0005	D	IFC	
▼ Sts: IFR						
▼ Discipline: 8MILES						
	☐		CN-632021-001-CN-632021-...	SD1	IFR	
▼ Discipline: CIV-MD						
	☐		TE-0001-625-PRD-DATA-OU...	A	IFR	
	☐		TE-0001-625-PRD-DATA-OU...	A	IFR	
	☐		TE-0001-625-PRD-DATA-OU...	B	IFR	
	☐		TE-0001-629-SHP-DWG-OU...	A	IFR	
▼ Discipline: STRU						
	☐		TE-0001-630-SHP-DWG-OU...	B	IFR	

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 Document No. link to open the details screen.
3. Select the **Comments** Tab.

Document No: QAS-PLAN-L1-004 Rev: A Sts: IFR

DETAILLINKSCOMMENTSFILE VIEWERUSER ACCESSTRANSMITTAL HISTORY

CancelSave

☐	Comm...	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by	Commented by company	Comments	Annotation type	File Name	Category	Closed out
☐		01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Is this the correction v...			Moderate	☐
☐		02	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Check clearance at L...			Major	☐

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

☐	Comm...	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by	Commented by company	Comments
☐		01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Is this the correction v...

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

☐	Comm...	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by
☒		01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks

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

New Comment

* Comments

Plain Text

Arial 13 px A B I U [List Icons]

* Category:

Select one...

Raised by company Raised by

Select one... Select one...

Send document comments to

☐ Originator ☐ Document recipients

Attach files:

Attach files Download all Download selected

There are no attachments uploaded.

Items: 0

Cancel Save

- Select a **Category** for the comment and **Raised by** if the comment is being made on behalf of someone else.
- Click **Attach Files** if there is a requirement to attach an external file, locate the file to upload, and click **Open**.
- Click **Save** then **Close**.
- 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.

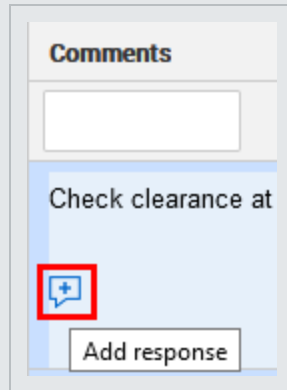
☐					Document No.	Rev	Sts
					12345-01	A	IFI
					12345-02	B	IFC

- 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.

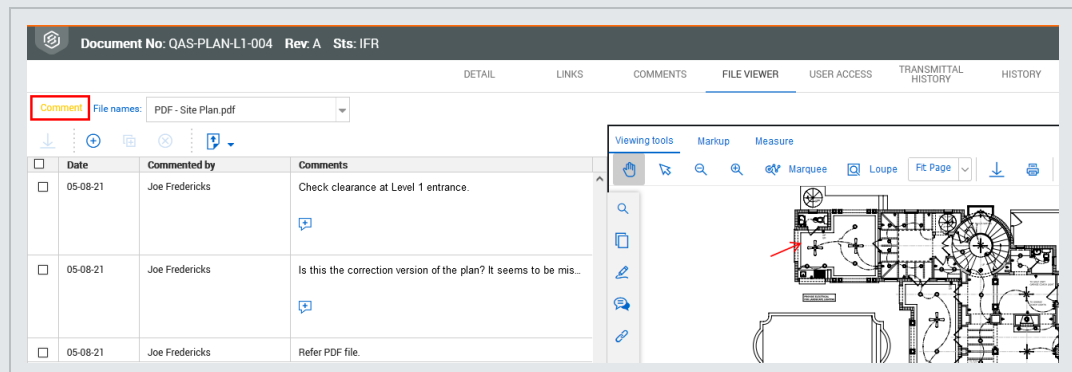
☒	Comment level		Item	
☒			02	
☒			01	

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.

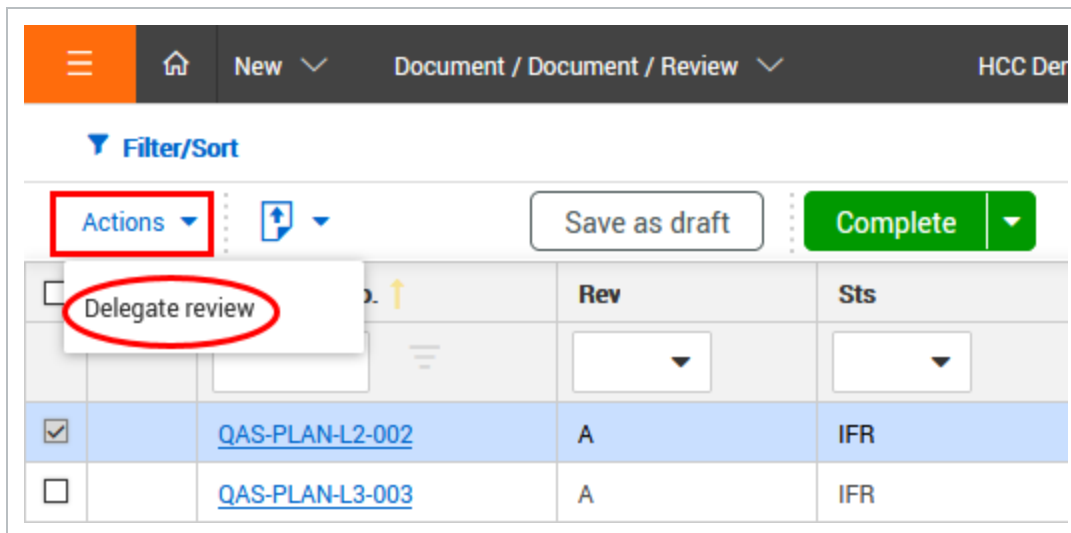
NOTE

- 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.

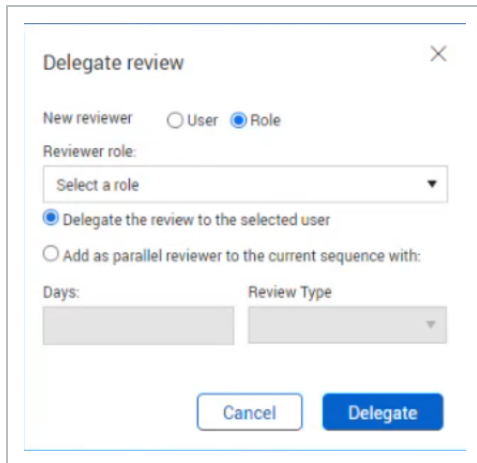
5.8 DELEGATE REVIEW

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

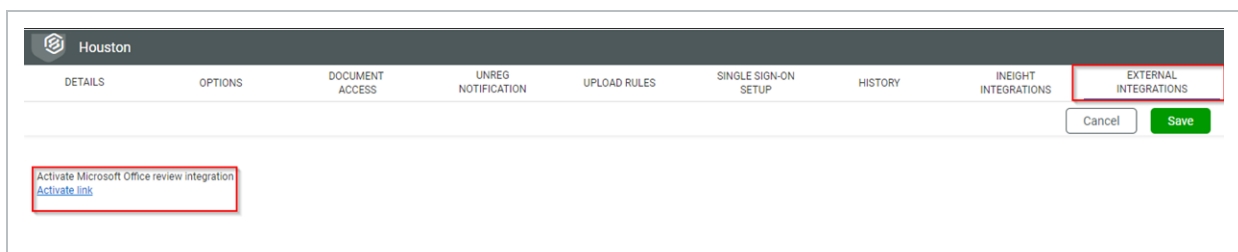
Summary: Activate the Microsoft Office review integration so that contacts in your company can send documents in a workflow to an external review in Office 365.

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.

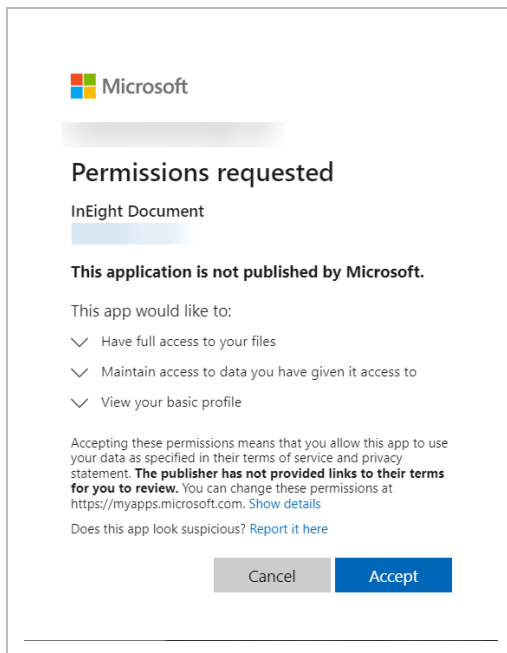
This task is performed only one time per project for the company.

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.

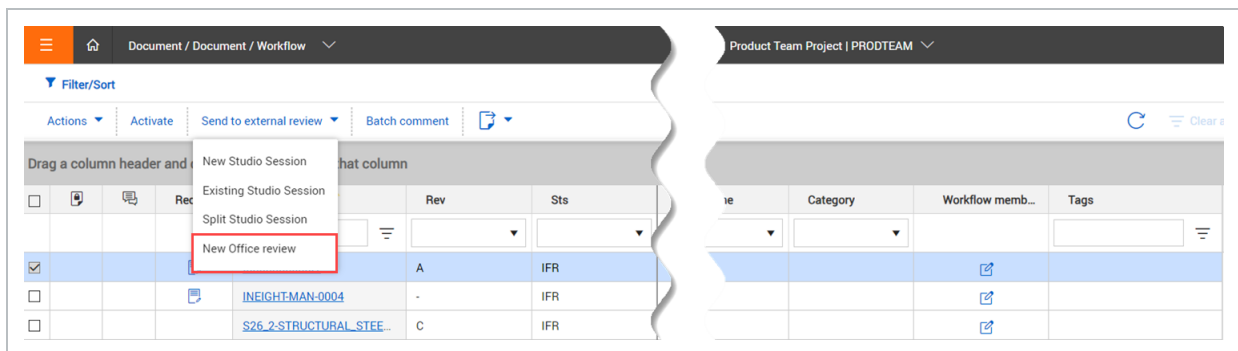
Considerations: The documents must be uploaded into a restrained status and contain only one Office file format. If a document contains multiple Office-supported formats, you cannot initiate the review. The review coordinator and review initiator must be from the same company. For information about submitting 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

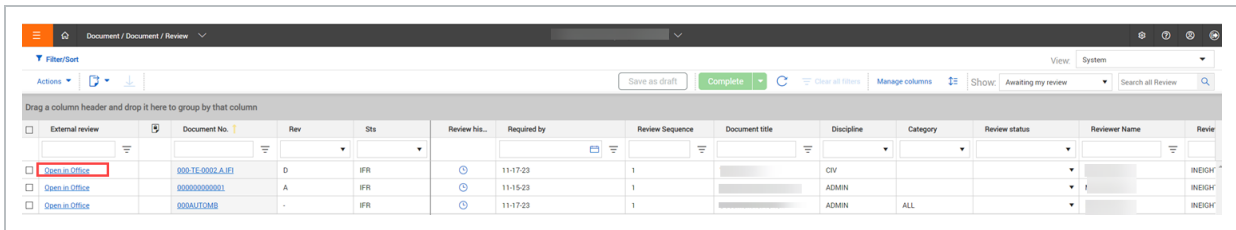
Changes made in the viewer are not shown in the file in Office. You must use one or the other during review. Changes in Office come back into Document after the review.

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.

Filter/Sort

Actions Activate Send to Studio Session Batch comment

Drag a column header and drop it here to group by that column

	Redlines	Document No.	Rev	Sta	Document title	Discipline	Category	Workflow members
☐		000-TE-0001-IDX	D	IFR	Index Sheet	ADMIN		
☐		INEIGHT-ELEC-00003-SHPD	A	IFR	Shop drawings	ELEC		
☐		TE-0001-PRDDATA-1	B	IFR	Piping product data	PLU	CAR	

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.

Document review workflow

Document No. INEIGHT-ELEC-00003-SHPDWG-005-2 Rev. A Sta. IFR

* Document review coordinator: ☒ User ☐ Role

* Document review coordinator company: INEIGHT

* Document review coordinator contact:

Total review duration in (inputted) days: 5

* Display: ☒ All users ☐ Roles ☐ Free form review teams

Select contacts to allocate

Select a company

Search all contacts

Name
No records to display

Allocated contacts, roles and free form review teams

Search allocated

Name	Company	Due date	Sequence	Duration (Days)	Optional	Either
			1	5	☐	☒
			1	5	☐	☒

Cancel

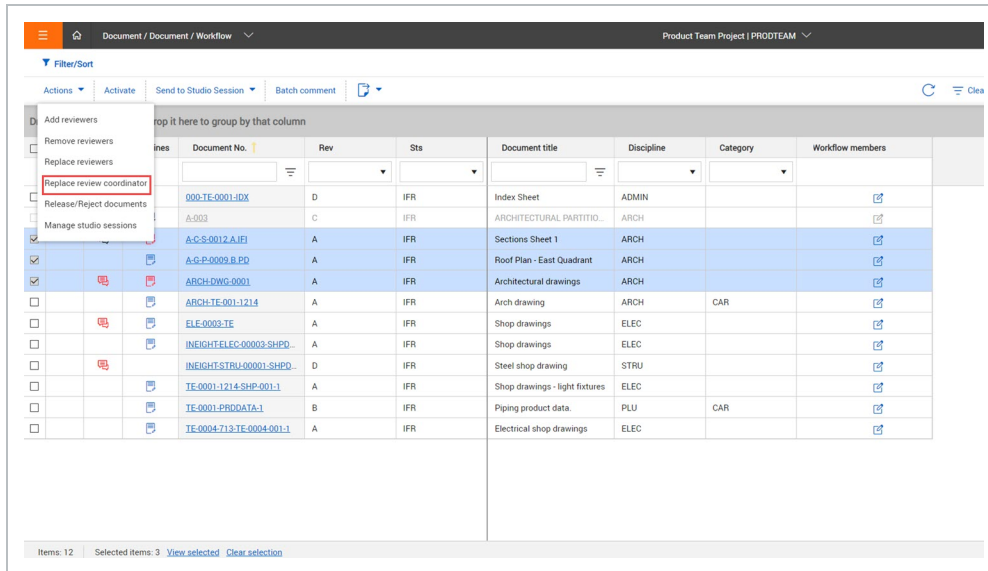
Save

- 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.

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

The dialog box is titled 'Replace Review Coordinator'. It has two radio buttons: 'User' (selected) and 'Role'. Below these are two fields: '* Document review coordinator company:' with a dropdown menu showing 'Select a company', and '* Document review coordinator contact:' with a dropdown menu showing 'Select a review coordinator'. At the bottom right are 'Cancel' and 'Replace' buttons.

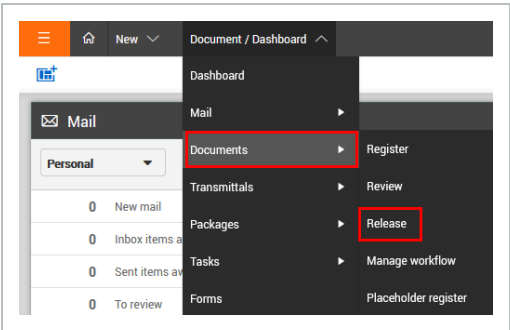
- Enter the review coordinator company and contact, and then click **Replace**.

5.14 DOCUMENT REVIEW APPROVAL/RELEASE

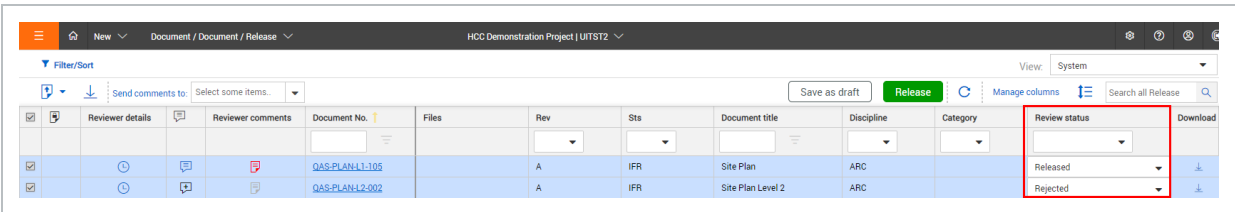
After all reviewers have completed their reviews of a restrained document in a workflow, the Review Coordinator receives an email notification. The Review Coordinator uses the **Document Release** screen to conduct their own review, select comments to include, and apply a review status, which will either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

Using the Document Release screen:

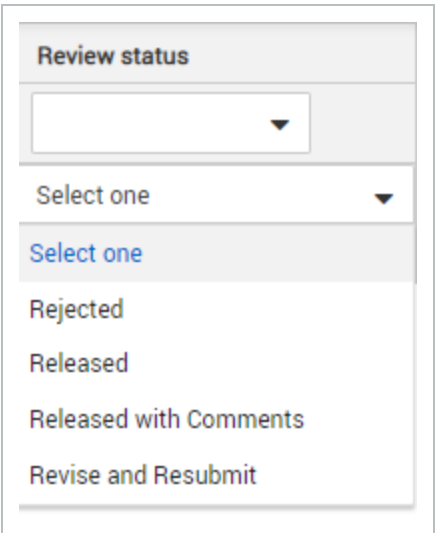
1. From the **Module Menu**, hover over **Documents** and select **Release**.



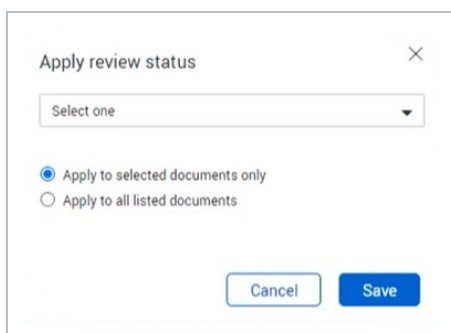
2. The Documents awaiting release screen defaults to displaying **All documents awaiting release** by the logged in Review Coordinator.



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.

Review comments for Document No. 20200213-6 Rev C Sts: 82

Issued by	Company	Commented by	Comments	Tags	Annotation type	File name	Category	☒ Closed-Out
rg Harrison	Houston Contracting	Greg Harrison	Refer PDF file. View more		Symbols	LETTER-LETTER-HCC-00157.Pdf		☒
rg Harrison	Houston Contracting	Greg Harrison	Test View more		Callout	LETTER-LETTER-HCC-00157.Pdf		☒
rg Harrison	Houston Contracting	Greg Harrison	Refer PDF file. View more		Square	LETTER-LETTER-HCC-00157.Pdf		☒

Items: 3

Close

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.

Filter/Sort

Send comments to:

Select some items..

☐		Reviewer details		Reviewer comments	Document No.
☒					QAS-PLAN-L1-105
☐					QAS-PLAN-L2-002

Review coordinator's comments

Document

QAS-PLAN-L1-105

No.:

Rev:

A

Status:

IFR

Title:

Site Plan

Review coordinator's comments

Arial

13 px

A

B

I

U

* Category

Moderate

Select reviewer comments to include with your summary

Attach files

Download all

Download selected

There are no attachments uploaded.

Items: 0

☐ Apply to all documents

Cancel

Save

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.

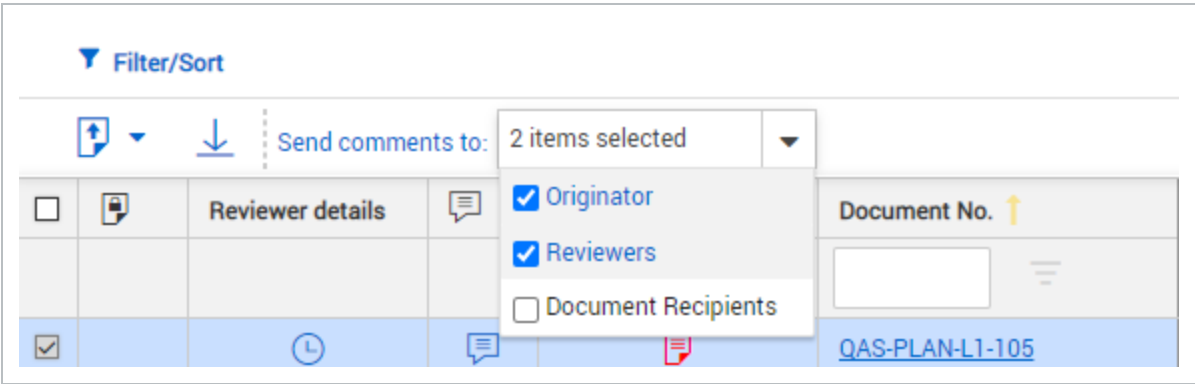
11. Use the **Attach files** button to select one or more external files to include as part of your Review Coordinators comments.

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

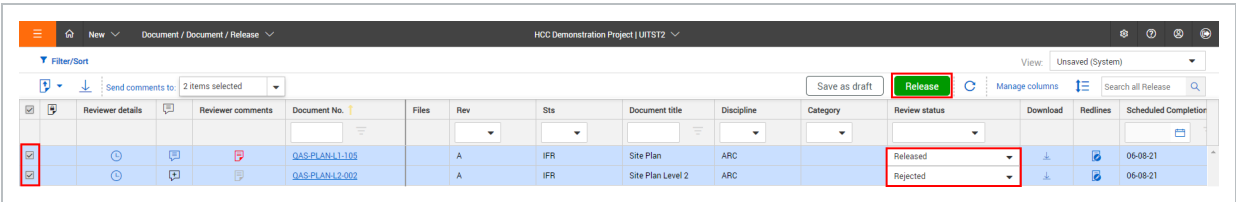
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- 13. Click **OK** to close the Review Coordinator’s comments window.
- 14. From the Release screen, select who the review comments should be sent to: Originator, Reviewers or Document Recipients.



- 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

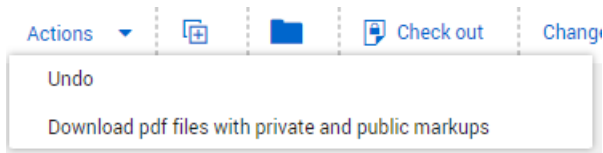
- **If the document is released:** The document is distributed automatically using email notifications.
- **If the document is rejected:** only the Originator, Review Team and Admins retain access to the document. Users from the originating company will not receive access even if they are part of the 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.

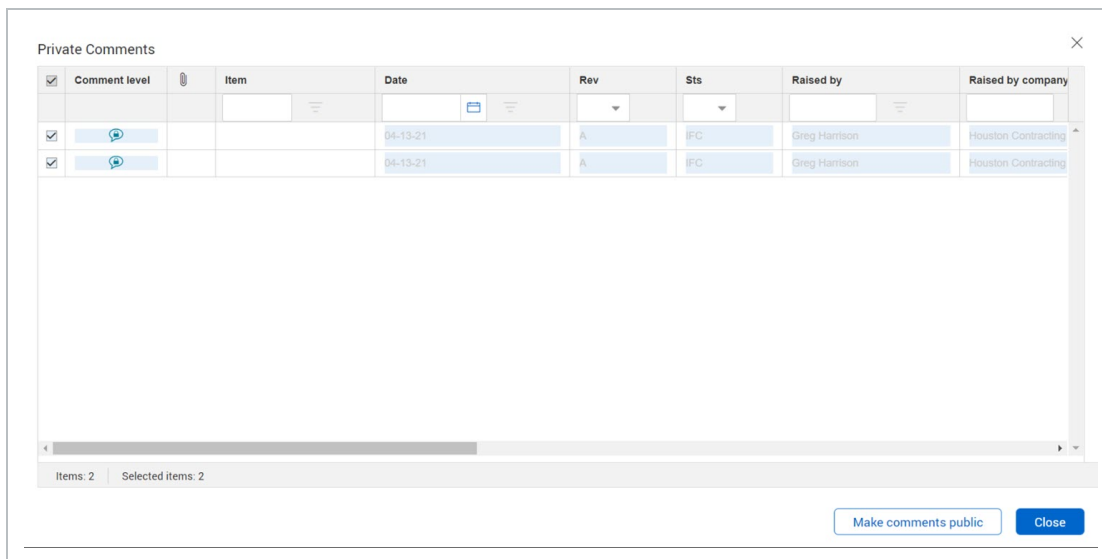
2. Extract the zip file.
3. Open the PDF file.

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.

↑ Sts ×						
☐		Document No. ↑	Rev	Sts	Review status	Review history
▼ Sts: IFC						
☐		A-G-FP-0005	D	IFC		
▼ Sts: IFR						
☐		CN-632021-001-CN-632021-...	SD1	IFR		
☐		TE-0001-625-PRD-DATA-OU...	A	IFR		
☐		TE-0001-625-PRD-DATA-OU...	A	IFR		
☐		TE-0001-625-PRD-DATA-OU...	B	IFR		
☐		TE-0001-629-SHP-DWG-OU...	A	IFR		
☐		TE-0001-630-SHP-DWG-OU...	B	IFR		

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.

↑ Sts ×		↑ Discipline ×				
☐		Document No. ↑	Rev	Sts	Review status	Review history
▼ Sts: IFC						
▼ Discipline: ARCH						
☐		A-G-FP-0005	D	IFC		
▼ Sts: IFR						
▼ Discipline: 8MILES						
☐		CN-632021-001-CN-632021-...	SD1	IFR		
▼ Discipline: CIV-MD						
☐		TE-0001-625-PRD-DATA-OU...	A	IFR		
☐		TE-0001-625-PRD-DATA-OU...	A	IFR		
☐		TE-0001-625-PRD-DATA-OU...	B	IFR		
☐		TE-0001-629-SHP-DWG-OU...	A	IFR		
▼ Discipline: STRU						
☐		TE-0001-630-SHP-DWG-OU...	B	IFR		

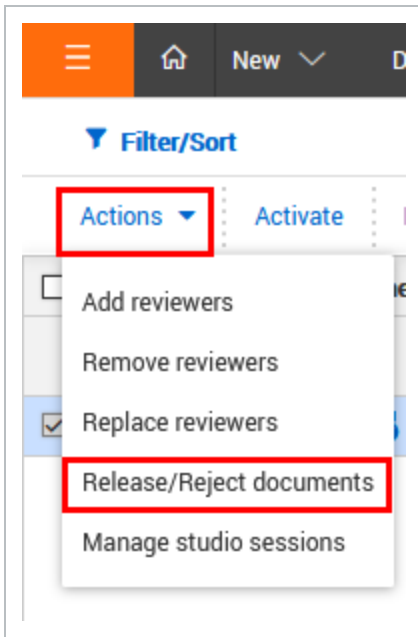
5.15 DOCUMENT RELEASE WITHOUT ACTIVATING A WORKFLOW

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).

A screenshot of a window titled 'Review initiator's comments'. The window has two tabs: 'DETAILS' and 'DOCUMENTS'. The 'DETAILS' tab is active. Inside the window, there is a section for '* Review status' with a dropdown menu showing 'Select a reviewer status'. Below this, there are three radio buttons: 'Proceed without comments' (which is selected), 'Automatically Add "No Comments"', and 'Proceed with comments'. Underneath the radio buttons is a 'Message' section with a rich text editor. The editor has a toolbar with options for font (Arial), size (13 px), bold (A), italic (I), underline (U), bulleted list, numbered list, and link. At the bottom right of the window are 'Cancel' and 'Save' buttons.

5. Click **Save**.

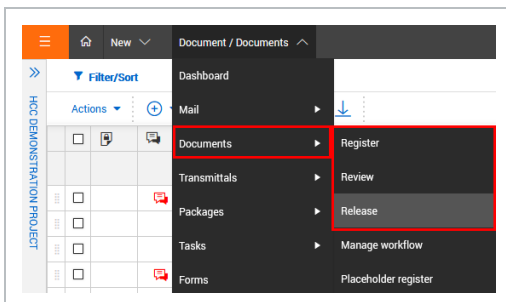
NOTE

- 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

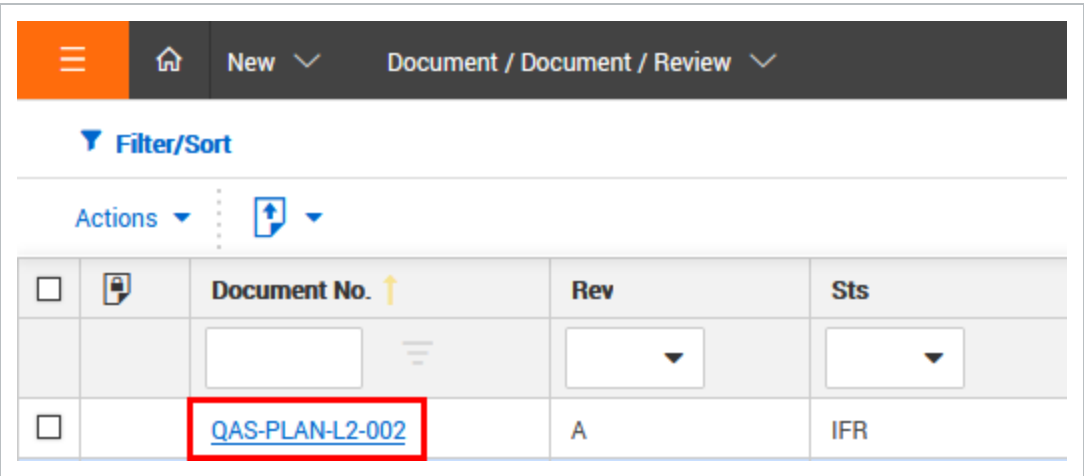
5.16 VIEW REVIEW STATUS

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

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



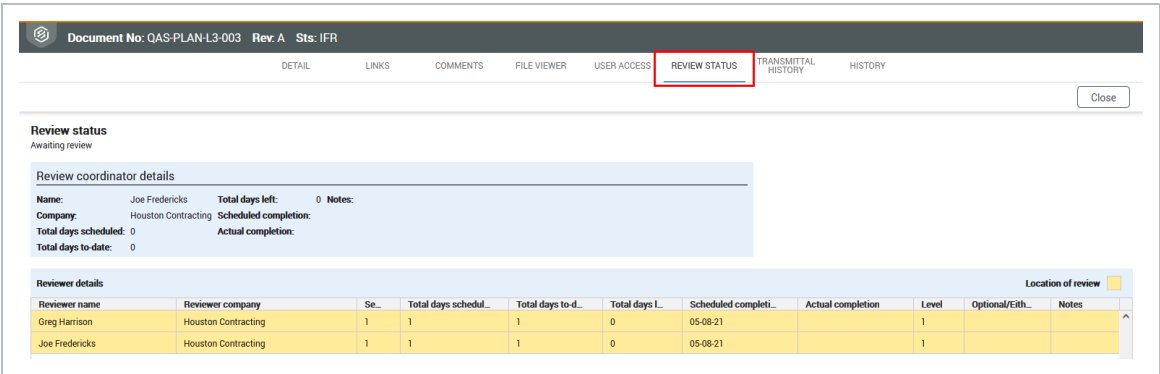
2. Click on the Document Number link to open the details screen.



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.