DOCUMENT ESSENTIALS USER GUIDE

# DOCUMENT MANAGEMENT



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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**.

Filter/S	ort											V	iew: Syst	tem		•	ł
Actions 💌	••	Trans	smit 💌	🗗 🔹 🔟					С	Manage columns	t Show:	Latest unrest	trained	•	Search all D	ocument:	4
•		P		Document No. 1	Rev	Sts	Document title	Discipline	Category	Туре	Review status	3=	PDF	MSO	DWG	Other	
					-	-		•	-	•	•						
		B		A-8PO-101	00	IFC	Floor Plan - 1	ELE		DRG	Un-Restrained		۲	7	5	5	
		B		A-BPO-102	00	IFC	Floor Plan - 2	ELE		DRG	Un-Restrained		۲	٦	5	7	
		B		A-BPO-103	00	IFC	Floor Plan - 3	ARC		DRG	Un-Restrained		۲	٦	5	5	
		B		A-BPO-104	00	IFC	Floor Plan - 4	ARC		DRG	Un-Restrained		١	7	5	3	
		B		A-BPO-105	00	IFC	Floor Plan - 5	ARC		DRG	Un-Restrained		٢	17	5	3	
		B		A-BPO-106	00	IFC	Floor Plan - 6	ARC		DRG	Un-Restrained		۲	17	3	3	
		B		A-BPO-108	01	IFI	Floor Plan - 1	ELE		DRG	Un-Restrained	B	۲	7	5	9	
		P		A-BPO-109	00	IFI	Floor Plan - 2	ELE		DRG	Un-Restrained		١	٦	5	٦	
		P		A-BPO-110	04	PD	Floor Plan - sheet 1	ELE		DRG	Un-Restrained		١	٦	5	٦	
		B		A-BPO-111	00	IFI	Floor Plan - 4	ELE		DRG	Un-Restrained		۲	3	5	٦	
		В		A-BPO-112	02	IFI	Floor Plan - 5	ELE		DRG	Un-Restrained		12	17	۲	9	
		B		A-BPO-113	08	IFC	Floor Plan - 6	ELE		DRG	Un-Restrained		۲	17	5	9	
		B		A-BPO-114	A	IFR	Floor Plan - 6	ARC		DRG	Un-Restrained		12	2	۲	12	

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

Column	Description
Туре	The type of the document. Documents can be grouped by type (e.g. Drawing, 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/S	ort											Vi	ew: Syst	em		•
A	ctions 🝷	• •	Transr	nit 🝷	🔁 🔹 🔟					С	Manage columns	t= Show:	Latest unrest	rained	•	Search all D	iocument:
C	1	5	₽		Document No. 1	Rev	Sts	Document title	Discipline	Category	Туре	Review status	¥=	PDF	MSO	DWG	Other
						-	-	-	•	-	•	-					
C	1		B		A-BPO-101	00	IFC	Floor Plan - 1	ELE		DRG	Un-Restrained		۲	P	7	٦
C	1		B		A-BPO-102	00	IFC	Floor Plan - 2	ELE		DRG	Un-Restrained		۲	٦	5	٦
C	1		B		A-BPO-103	00	IFC	Floor Plan - 3	ARC		DRG	Un-Restrained		٥	٦	٦	٦
C	1		B		A-BPO-104	00	IFC	Floor Plan - 4	ARC		DRG	Un-Restrained		۵	3	3	٦
C	1		P		A-BPO-105	00	IFC	Floor Plan - 5	ARC		DRG	Un-Restrained		۲	3	3	3
C	1		B		A-BPO-106	00	IFC	Floor Plan - 6	ARC		DRG	Un-Restrained		۲	P	5	5
C			B		A-BPO-108	01	IFI	Floor Plan - 1	ELE		DRG	Un-Restrained	3	٥	5	5	٦
C	1		B		A-BPO-109	00	IFI	Floor Plan - 2	ELE		DRG	Un-Restrained		٥	٦	٦	٦
C	1		B		A-BPO-110	04	PD	Floor Plan - sheet 1	ELE		DRG	Un-Restrained		۲	7	7	٦
C			P		A-BPO-111	00	IFI	Floor Plan - 4	ELE		DRG	Un-Restrained		۲	7	7	٦
C			B		A-BPO-112	02	IFI	Floor Plan - 5	ELE		DRG	Un-Restrained		7	5	۲	5
C			B		A-BPO-113	08	IFC	Floor Plan - 6	ELE		DRG	Un-Restrained		۲	٦	٦	1
C	1		B		A-BPO-114	A	IFR	Floor Plan - 6	ARC		DRG	Un-Restrained		5	7	۲	7

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

Show:	Latest	unrestrained	-	Documents that I car	n downl	0				
Filter b	oy:	Module		Column		Operator		Value (i)		
$\oplus$		Document	•	Select one	-	Select one	•	Select some items	•	$\otimes$
+	AND	Document	•	Select one	•	Select one	•	Select some items	•	$\otimes$
<b>(+)</b>	AND	Document	•	Select one	•	Select one	•	Select some items	•	$\otimes$
÷	AND	Document	•	Select one	•	Select one	•	Select some items	•	$\otimes$
÷	AND	Document	-	Select one	•	Select one	•	Select some items	-	$\otimes$
Sort by	y.	Column								
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( <del>)</del>	THEN	Select one	•	Ascending order		O Descending order		$\otimes$		
⊕ 1	THEN	Select one	•	Ascending order		O Descending order		$\otimes$		

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.

▼ Fi	iter/Sort										Vie	ew: Syst	em		•	•
Actions	• •	Transmit	• 🗗 • 🔟					С	Manage columns	t= Show:	Latest unrestr	ained	-	Search all D	ocument:	
	9 🖷	8	Document No. 1	Rev	Sts	Document title	Discipline	Category	Туре	Review status	¥=	PDF	MSO	DWG	Other	
				-	-		-	•	-	•						
		B	A-BPO-101	00	IFC	Floor Plan - 1	ELE		DRG	Un-Restrained		۲	٦	7	3	
		B	A-BPO-102	00	IFC	Floor Plan - 2	ELE		DRG	Un-Restrained		۲	7	5	5	
		B	A-BPO-103	00	IFC	Floor Plan - 3	ARC		DRG	Un-Restrained		۲	3	3	3	
		B	A-BPO-104	00	IFC	Floor Plan - 4	ARC		DRG	Un-Restrained		۲	۳	7	7	
		B	A-BPO-105	00	IFC	Floor Plan - 5	ARC		DRG	Un-Restrained		۲	٦	7	7	
		B	A-BPO-106	00	IFC	Floor Plan - 6	ARC		DRG	Un-Restrained		۲	7	5	5	
		B	A-BPO-108	01	IFI	Floor Plan - 1	ELE		DRG	Un-Restrained	3	٢	7	7	7	
		8	A-BPO-109	00	IFI	Floor Plan - 2	ELE		DRG	Un-Restrained		۲	7	7	7	
		B	A-BPO-110	04	PD	Floor Plan - sheet 1	ELE		DRG	Un-Restrained		۲	7	7	7	
		P	A-BPO-111	00	IFI	Floor Plan - 4	ELE		DRG	Un-Restrained		۲	7	7	7	
		B	A-BPO-112	02	IFI	Floor Plan - 5	ELE		DRG	Un-Restrained		5	7	۲	7	
		B	A-BPO-113	08	IFC	Floor Plan - 6	ELE		DRG	Un-Restrained		۲	7	7	7	
		B	A-BPO-114	A	IFR	Floor Plan - 6	ARC		DRG	Un-Restrained		7	7	۲	7	

## **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:

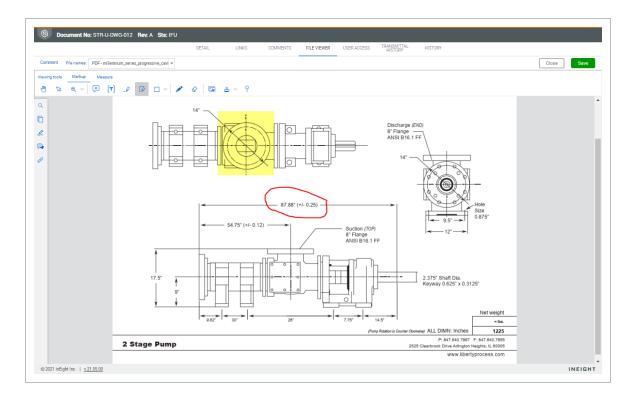
	9		P	PDF	Document No. 1	Rev
						•
				-	<u>88-999</u>	KNRV1
			P	-	888888888888888888888888888888888888888	A
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		Щ.		-	CATHY2019090401	J
		Щ.		-	CATHY201909061-3	A
				P	NADEETEST2	J

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

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

#### New File Viewer (version 21.05)

			DETAIL	LINKS C	OMMENTS FILE VIEWER	USER ACCESS TR	ANSMITTAL HISTORY	HISTORY		
iment File namea: PDF - A-G-S0	CH+003.C.IFT.pdf	Ŧ								Close
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Annotations.	×	Material Report for play	z: Avondale						Page 1 of 5	
Annotations		Report Style: Paradise	Detailed					Wednesday, Novem	ber 01, 2006, 10:27 AM	
17/6/2021		WKSTG BS-ACC	CT# BS-ITEMW	MATERIAL	USE/PART/SKUw DESCRIPT	ION OTY UNIT	COST	LABOR   SALES	TAX TOTAL	
Joe Fredericks Houston Contracting	Page: 1			10000-19999 PREPARATIC	N Dekalb Co.	583 EACH	1.00		563.00	
17/6/2021		FEES 143 FEES 143	-1035 BS-0 -1015 BS-0	010 Bidg Reinspection Fee 010 Certificate Of Occupancy	Dekalb Co. Dekalb Co.	1 EACH 1 EACH	25.00 25.00	-	25.00	
Joe Fredericks	Page: 1	FEES 143	-1101 BS-0	0010 Warranty Fees(HBW) 0010 Architectural Fee 0031 Engineering (Stru)	HomeBuyerWarranty Design Modifications Insp Ftg or Framing	1 EACH 1 EACH 1 EACH	450.00 450.00 75.00	-	- 450.00 - 450.00 75.00	
Houston Contracting		SURV-S 143	-1110 BS-0 -1120 BS-0	001 Blueprints 042 Surveys (Stake Footings)	Const. & Office Set Locate Home on Lot	1 EACH 1 EACH	25.00 175.00		25.00	
		FOUNL 143 GRAV 143	-2105 SITE-04-00 -1225 SITE-01-00	0046 Surveys (Final Plat) 23-6 GeoTex Drive 01-4 Gravel Driveway	Plat for Closing GeoTex/2002 #4Crushed Stone	1 EACH 1 ROLL 9 TON	375.00 40.00 12.63	20.00	375.00  7.95 121.62	
		UTIL-C 143	-1410 BS-0	02-R Grading Rough 0075 Temporary Electric 0070 Water Service (Permit)	Clear & Grade Lot Connect to ParPole Dekalb Co.	1 EACH 1 EACH 1 EACH	600.00 50.00 850.00	2	_ 600.00 _ 50.00 _ 850.00	
		FEES 143 FEES 143	-1450 BS-0 -1510 BS-0	0070 Sewer Service (Permit) 0000 Const Period Interest 0000 Closing Fees & Costs	Dekalb Co. 5 Month Allowance Construction Loan	1 EACH 1 EACH 1 EACH	650.00 1800.00 1600.00	Ξ	650.00	
		FEES 143 FEES 143	-1530 BS-0 -1540 BS-0	0000 Appraisal (Const Loan) 0000 Taxes During Const	Construction Loan Property Taxes	1 EACH 1 EACH	200.00		200.00	
		FEES 143	-1650 BS-0	000 Builders Risk Insurance SUBTOTAL	General Liability	1 EACH	200.00	-	_ 200.00 8444.62	
		GRAD-B 143	-2006 BS-010	20000-29999 Ex/FOUNDAT	IO SlabBox or Bs/mt/Vall	1 EACH	100.00		100.00	
		FOUNL 143 FOUNP 143	-2105 MET-03-0	001 Wire Mesh (Slab) 4-10 Rebar (Footings)	66REWIRE #4-1220REBAR	2 ROLL 25 PCS	0.06 3.20		0.12 5.60 85.60	
				0000 Rebar (Wall) 7-10 Weep Tile/Fnd Drain Tile Stope (Slab)	Varies 410SOLID	5 PCS 265 FEET 28 CUYD	0.16	-	0.05 0.85	
		FOUNL 143	-2105 WOOD-02-05	C165 Foundation Form Nails 00-2 Foundation Form Board	16D 14YPMR 2"x10"	5 POUNDS 242 FEET	1.00	_	0.35 5.35 16.60 253.76	
		FOUNP 143	-2105 WOOD-02-0 -2105 T&M-09-0 -2105 GEN-04-MAB15	1554 Foundation Form Stake 1050 Slab Perimiter Insulation 1073 Anchor Strap	2412YP3 2"x4" 8DOW12 1"x40"x80" MASMUDSILL	182 FEET 13 EACH 20 EACH	0.22 10.00 0.79		2.80 42.84 9.10 139.10 1.10 16.90	
		FOUN-P 143	2105 SITE-04-00 2105 T&M-04-620	23-1 Silt Fence 2100 MoistBarierSlab 2000 VaporBarrier	3×100/SILTFEN 20100POL6	1 EACH 942 SQFT 1673 SQFT	25.00 0.02 0.04	-	1.75 26.75 1.31 20.15 4.68 71.60	
		TERM 143	T8M-04-0	000 VaporBarrier(Clg) 0189 Termite Protection	Pre-Treatment	1673 SQFT 1034 SQFT 1 EACH	200.00	Ξ	200.00	
				SUBTOTAL 30000-31299 ROUGH Struc					963.02	
				31100-31199/FraminoFloor						
1										



#### NOTE

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

# 1.4 VIEW PDFS WITH PDF VIEWER

When you open a PDF for viewing, the PDF viewer opens. The PDF viewer is a web-based application that renders the document using your browser and can also be used to mark up documents.

Download PDF Viewer Quick Guide

#### **1.4.1** To view a document from the Document register using PDF viewer

When you select a PDF from the document register, the document opens with the PDF viewer. The PDF viewer gives you 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 in 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 have access to.
- 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.

#### **1.4.2 PDF viewer toolbars**

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

#### **1.4.2.1 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.

	f v						
iewing tools Markup Measure							
🖑 😼 🔍 🌒 🐼 Marquee	Q Loupe Fit Page V	<b>a</b> (†)	1 / 6 < Prev		cument >		
	1			1			
0			Net a receiver per a gas of 702/08	31			
2		Pro algonicas de constantes activados activados activados de constantes de	Number and an international and an international and an international and and and an international an international an international an international an int	an function of and a sector sector.	and any sectors upon the Allia		
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<b>6</b>		The basis of and the basis of a set of the basis of the b		In all of the second se	ri ar di tanggan sal Ar		

ltem 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.

#### **Comments & Annotations Pane**

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

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ltem 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. 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.

#### 1.4.2.2 Viewing tools tab

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

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ltem 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.
6	Previous and Next Document	Open the next or previous document in the register from the viewer.

#### 1.4.2.3 Markup tab

Tools on the Markup tab let you add text and other annotations to the PDF.You must save any markups you make before closing the file.

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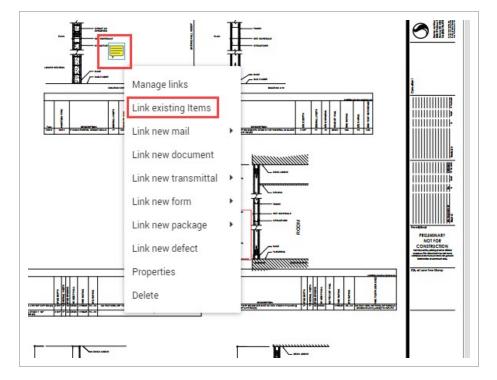
ltem number	Name	Use
1	Pan hand	Click and drag to move around a large drawing.
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.
4	Note	Add a note to the PDF page.
5	Text box	Add a text box on the 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	Highlight	Highlight text on the PDF page.
7	Area highlight	Draw a highlight box.
8	Shape	Draw a shape, such as a square, circle, or line.
9	Pencil	Draw a pencil line.
10	Eraser	Erase a pencil line.
11	Image	Insert a saved image.
12	Stamp	Add a stamp, such as one that shows approval or rejection.
13	Pin	Place a marker (pin) to an area of the PDF page.

#### 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.

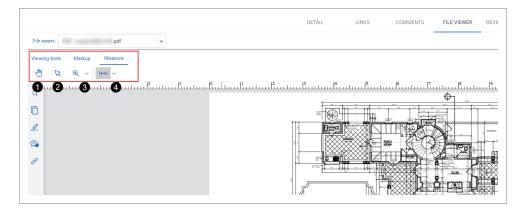
You can create and link an item to an annotation from any of the tabs of the PDF viewer. If you want to add links to the document in general, you can use the Links tab.

- 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.

#### 1.4.2.4 Measure tab

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



ltem 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.

ltem number	Name	Use
4	Measure	Draw an area to measure distance, perimeter, or area. A dialog box opens that lets you specify the scale.

#### 1.4.3 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.

Download PDF Viewer Quick Guide

# 1.5 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).

#### **1.5 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.

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		P		A-G-S-0011	F	AB	Section AA	ARC		DRG	Un-Restrained	7	7	۲	7

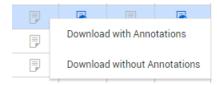
- 2. If the document is a PDF, a menu shows with options to download with or without annotations. Choose **Download without Annotations**. If the document is not a PDF, the option is not shown.
- 3. If a download disclaimer appears, click Agree.
- 4. Click **Download** to save the file to your computer.

#### **1.5 Step by Step 2** — Download a document with annotations with Adobe

You can download a PDF with markups.

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

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



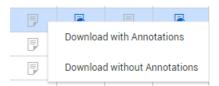
- 2. Click Download with Annotations. PDF files are provided in a zip file.
- 3. Extract the zip file.
- 4. Open thePDF file.

#### 1.5 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.

**1.5 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.

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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.

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- 4. Open the PDF file.

# **1.5 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.

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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.

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- 3. Extract the zip file.
- 4. Open the PDF in Bluebeam.

## **1.6 DOWNLOADING DOCUMENTS IN BULK**

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

#### **1.6.1 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.

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The Select files to download dialog box opens.

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

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		TS-10032015-RESTDOC-02.A.IFI.doc			962 KB
		TS-25062015-RESTDOC-04.TSRE1.IFC.plt			82 KB
		New Text Document.txt			1 KB
<b>~</b>	Doc 11	ument No: 00000000-TE-1027-1130-000	0 Rev: B	ev: B Sts: IFI	
		TS-06052015-UNRESTDOC-05.TSRE1.TSUN	1.pdf		103 KB
		s: 4 Selected items: 4 Selected file size: ownload O Download via Queue		m Zip Size	

- 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.

#### 1.6.2 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.

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- 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.

#### **1.6.3 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.

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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.

# **1.7 UPLOADING A SINGLE DOCUMENT**

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

### **1.7.1 To upload a single document:**

1. Click the **plus icon** and select **Single item**.

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

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#### 4. Click Save.

NOTE

#### Click Actions and select Duplicate to create a new document based on the attributes of a document you've selected.

- Click the **arrow** next to **Save** and select **Save & Transmit** to automatically launch the transmittal generation screen after the document is uploaded.
- 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.

#### 1.7.2 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 it 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 moduleare 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.

# **1.8 CHANGING DOCUMENT DETAILS**

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

#### **1.8.1 To change document details:**

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

	Filter/Sort							
	Actions 🝷	••	Trans	mit	• 🗗 • 🔟			
	Comments				Document No. 1			
	Check out				-			
	Check in				<u>A-BPO-101</u>			
8	Resubmit for re	view			<u>A-BPO-102</u>			
8	Compare			<u>A-BPO-103</u>				
8	Duplicate			<u>A-BPO-104</u>				
8	Generate docun	nent hyperi	ink	<u>A-BPO-105</u>				
8	Generate hyperl	ink for the	current i	r	<u>A-BPO-106</u>			
8	Print selected v	iew files		_	A-BPO-108			
8	Admin			•	Assign document access			
1	Share documen	t		•	Manage document access			
1			2		Restricted Document Access			
			Р		Transfer document ownership			
			P		Delete			
			P		Replace/Remove view file			
8			ß		Change document details			
1			P		Document Mask			
1			P		Manage studio sessions			
-			Р		<u>A-G-EL-0002</u>			
			101		1.0.51.0000			

3. Edit the details as required.

		DE	TAIL		
Actions 👻 🕀	Ch	eck out Change doo	cument details	Cancel	Save
* Document No. (i)	-				
A-BPO-101					
* Title					
Floor Plan - 1					
* Revision			* Status		
00 - Rev 00		Ψ	IFC - Issued for Cor	nstruction	*
* Discipline		* Type		Category	
ELE - Electrical	~	DRG - Drawing	Ψ.	Select one	*
From					
Jacob Palmer, Colt Contracting					
Review status		Date recorded		Date released	
Un-Restrained		14-12-2020		14-12-2020	
Area					
Select one	~				
Revision notes					
				Ι	

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

4. Click Save.

## **1.9 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.

#### **1.9.1** 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).

	DETAIL	LINKS	COMMENTS	FILE VIEWER	USER ACCES	S REVIEW STAT	US TRANSMITTAL HISTORY	HISTORY		
Actions 💌 🕞	E Check out	Change d	ocument details						Cancel	Save 🔻
Files			* Document No. (1)							
	been selected.		SB735F-25T-G							
Please sele preview.	ct a file to		* Title							
			2 1/2" Square Slip	Base Top / Plate						4
			* Revision				* Status			
← 0 o	of1 →		02 - Rev 02			*	IFR - Issued for Revie	w		Ŧ
File name	Extension Size		* Discipline		* Tyj	)e		Category		
) SB735F-25T-G.2.pdf	pdf 174 KB	⊗ ▲	STR - Structural (N	(an Review)	~ DF	RG - Drawing	-	Select one		~
			From							
			John Smith, Houston	1 Contracting						
			Review status		Date	recorded		Date released		
			Released		29-1	0-2020		29+10+2020		
			Area							
			Select one		Ŧ					
			Revision notes							
										11
			Remarks							

4. Click Save.

# 1.10 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.

#### 1.10.1 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).

	DETAIL LINKS	COMMENTS FILE VIEWER U	SER ACCESS REVIEW STAT	TUS TRANSMITTAL HISTORY	HISTORY	
Actions 👻 🕞 🖿	🕒 Check out Change d	ocument details			Cancel	Save
iles		* Document No. (1)				
No file has been sele Please select a file to preview.		SB735F-25T-G				
		* Title				
		2 1/2" Square Slip Base Top / Plate				
← 0.of1 →		* Revision		* Status		
← 0 of 1 →		02 - Rev 02	*	IFR - Issued for Review		Ŧ
File name Exte	ension Size	* Discipline	* Type		Category	
SB735F-25T-G.2.pdf pdf	174 KB 🚫 🔶	STR - Structural (Man Review)	DRG - Drawing	Ŧ	Select one	*
		From				
		John Smith, Houston Contracting				
		Review status	Date recorded		Date released	
		Released	29-10-2020		29-10-2020	
		Area				
		Select one 👻				
		Revision notes				
						/
		Remarks				

- 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 <b>Bulk upload</b> , just use the tick boxes to indicate that the documents are superseded revisions.				
	<ul> <li>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.</li> </ul>				
	<ul> <li>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.</li> </ul>				
	<ul> <li>Documents uploaded as Superseded are saved with the Date recorded as the current date.</li> </ul>				

# **1.11 UPLOADING DOCUMENTS IN BULK**

Easily upload lots of documents using the bulk upload feature.

#### **1.11.1** To upload documents in bulk:

- 1 Actions . Transmit 💌 (+)9 Document No. Single item Bulk items P E. SB735F-25T-G P TC-MANREVIEW-14012020
- 1. Click the **plus icon** and select **Bulk items**.

2. Click the **upload icon** and select **Upload files in bulk**. New rows will automatically be added for each file you upload.

	Bulk upload	_	
1 🌲	new rows 🕂 🚫	<u>↑</u> - Copy attributes	Get attributes 👻 Validate
	Files	Upload files	• Document No. (j)
	🔁 Add files	Upload files in bulk	SB735F-25T-G
	Ly Add files	Opidad files in buik	38730F-201-6

3. If you need to add multiple files to a document, click **Add files**. You can upload multiple files for each document they are different file formats.

1 🛔	new rows 🔶 🛞 🚹 🗸 Copy attributes 🕻	Get attributes 👻 Validate	
▲	Files	Document No.     (i)	Su • Title
	🔁 Add files	AUTO1	
	🔁 Add files	AUT02	

4. Enter in the details for the first document.

Ċ	) e	Bulk upload																		
1	÷	new rows 🕘 🛞 📩 👻 Copy attributes	Get attributes 👻 Validate																Can	cel Save
	*	Files	Document No.	Su	• Title	Revision		- Status		Discipline		• Type		Category	Re	vision notes	Remarks	Reason	Area	
M		S8735F-25T-G.02.IFR.pdf ×	Document 02		Building 1A	D - Rev D	•	IFI - Issued for Information	•	ADM - Administration	•	RPT - Report	٠	RP - Route & Profile drawings	•				L01 - Level 01	•
		Add files	AUT02			Select one	•	Select one	•	Select one	•	Select one	•	Selectione	•				Select one	-
																//				
	21 InEi	ght Inc.   v21.05.00																		INEIGH

5. If the documents being uploaded have similar details, click the **Copy attributes** and select which details you want to copy to each row.

) I	Bulk upload	
1 🐥	new rows 🕂 🛞 🚹 👻 Copy attributes	Get attributes 👻 Validate
▲	Files	Document No.     (i)
	➡         SB735F-25T-G.02.IFR.pdf         ×	Document 02
	🔁 Add files	AUTO2

1 🌲 new rows 😛 🛞	Cor	oy attributes		×	Cancel Save
Files		ct where to place copied attribu	ites: Enter row amount:		* Revision
I ➡ SB735F-25T-G.	02.IFR.pdf ×	previous row	•	5 🌲	Select one
		ct the attributes to copy:			
🛃 Add files		Attribute	Value		Select one
		Document No.	AUT01	A	
		Title			
		Revision			
		Status			
		Discipline			
		Туре			
		Category			
		Revision notes			
		Remarks			
		Reason			
		Area			
				<b>-</b>	
			Cancel	Apply	

6. Click **Validate** to check all fields have been entered.

	new rows 💿 🛞 <u>†</u> 🔹 Copy attribu														Save
•	Files	Document No.	Su	• Title	Revision	Status	Discipline	• Type		Category	Revision notes	Remarks	Reason	Acea	
	SB735F-25T-G.02.IFR.pdf ×	DocumentA2		Building 1A	D - Rev D 👻	IFI - Issued for Information	ADM - Administration	RPT - Report	•	RP - Route & Profile drawings	•	s .		L01 - Level 01	-
	Add files	DocumentA2		Building 1A	D - Rev D 👻	IFI - Issued for Information	ADM - Administration	RPT - Report	-	RP - Route & Profile drawings	-			L01 - Level 01	

7. Click Save.

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

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IN	υ		E

- If you select a document in the Register before selecting Bulk upload, the details of that document will be displayed in a row. You can edit the details as needed.
  - If you're uploading revised documents, select the documents in the Register before selecting **Bulk upload**. You can edit the revision number and attach new files.
  - If you click **Validate** and there is an error, the incorrect fields will be displayed in red so you can edit them as required.
  - To delete a row, select the document and click the cross icon.
  - Click **Get Attributes** to retrieve document details from previous revisions already uploaded to the Register.
  - 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.

### **1.12 EXPORT FOLDERS**

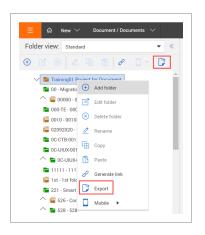
To assist in project handover of documents incrementally, an export option is available on the document register. This export function packages the relevant files and provides a cover sheet with navigational links and an associated Microsoft Excel spreadsheet with the folder structure data and document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

#### **1.12 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.

	×
Export title:	
Export short description:	
Include cover sheet Include document meta data sheet	
Include cover sheet Include document meta data sheet Select file types:	
Include cover sheet Include document meta data sheet Select file types: PDF MISO DWG Other	

- 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.



# 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.

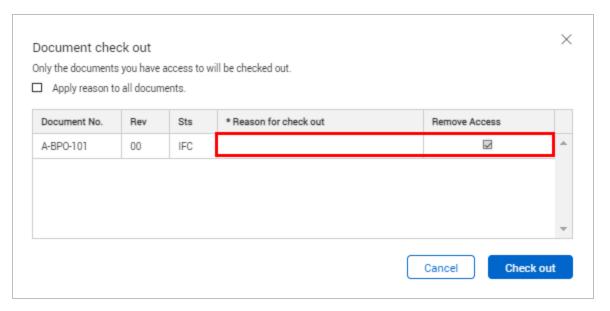
After any changes are completed the document can be checked in, meaning users can download it again.

### 2.1.1 To check out a document:

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

Comments	Document No. 1
Check out	-
Check in	<u>A-BPO-101</u>
Resubmit for review	A-BPO-102
Compare	A-BPO-103
Duplicate	A-BPO-104
Generate document hyperlink	A-BPO-105
Generate hyperlink for the current r	A-BPO-106
Print selected view files	A-BPO-108
Admin 🕨	A-BPO-109
Share document	A-BPO-110
	A-BPO-111

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



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

### 2.1.2 To check in a document:

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

Ľ	Actions 🔹 🔶 👻 Transmit 👻	🕽 • 🔟
	Comments	Document No. 🗍
	Check out	-
	Check in	A-BPO-101
8	Resubmit for review	<u>A-BPO-102</u>
8	Compare	A-BPO-103
8	Duplicate	A-BPO-104
8	Generate document hyperlink	A-BPO-105
8	Generate hyperlink for the current r	A-BPO-106
8	Print selected view files	A-BPO-108
8	Admin 🕨	A-BPO-109
8	Share document	A-BPO-110
1	<u>م</u>	A-BPO-111
1		A-BPO-112

3. Enter the reason for checking in the document.

ocument No.	Rev	Sts	Reason	
BPO-101	00	IFC		<b>A</b>
			-	

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

Г

Ľ	Actions 🝷 ( 🕂	<ul> <li>Transn</li> </ul>	nit	• 🗗 • 🕹	
	Comments			Document No. 1	Rev
	Check out			=	
	Check in			<u>A-BPO-101</u>	00
	Resubmit for review			A-BPO-102	00
	Compare			A-BPO-103	00
	Duplicate			A-BPO-104	00
	Generate document h	yperlink		A-BPO-105	00
	Generate hyperlink for	r the current r.	_	A-BPO-106	00
	Print selected view file	es		A-BPO-108	01
	Admin		۲	Assign document access	00
8	Share document		•	Manage document access	04
1		Р		Restricted Document Access	00
		P		Transfer document ownership	02
		P		Delete	08
		P		Replace/Remove view file	Α
		P		Change document details	Α
		P		Document Mask	Α
		P		Manage studio sessions	Α
		Р		A-G-EL-0002	в

4. Enter a reason for the deletion.

			Current history	* Reason for deletion	
A-BPO-101	00	IFC	View history		^
					1

- 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**.

NOTE

- 8. Click Yes to confirm.
  - 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**.

Document / Dashboard		
Dashboard		
Mail	۲	
Documents	۲	Register
Transmittals	۲	Review
Packages	۲	Release
Defects	۲	Manage workflow
Tasks	۲	Deleted items
Published reports		
Lots		

The Manage deleted documents register opens.

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

I=	ଜ	New 🗸	Document / Documents / Deleted
	Filter/So	rt	
	Actions 🝷		
C,	Restore		DeletedDate
5	-	4	
	00000000	000000	11-10-21
	TS-240820	021	12-10-21
	TS-24082	21	12-10-21

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.

Ľ	Actions 🔹 🕘 🔹 Transmit 🔹	• 🗗 • 🕹
	Comments	Document No. 🕇
	Check out	-
	Check in	A-BPO-101
	Resubmit for review	A-BPO-102
	Compare	A-BPO-103
H	Duplicate	A-BPO-104
	Generate document hyperlink	A-BPO-105

3. Enter the comment details.

FORMAT 👻	в	I	Ū	≣	ł	ΙΞ	1	M		
ategory:										
Select one										~
vailable to:										
Company										*
aised by company						Raised	ру			
Select one						Selec	one			~
Originator	nments to ] Docume	nt recipi	ents							
end document com Originator ( ttach files:										
Originator	] Docume			iload sele e are no a		ents uplo	aded.			*

- 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.

NOTEFor large files the comparison can take some time to prepare.NOTEIf a file has been scanned to PDF, it might not line up accurately on top of another<br/>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.

Actions 🔹 🔶 👻 Transmit	• 🗗 • 🕹
Comments	Document No. 1
Check out	
Check in	A-BPO-101
Resubmit for review	A-BPO-102
Compare	A-BPO-103
Duplicate	A-BPO-104
Generate document hyperlink	A-BPO-105

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.

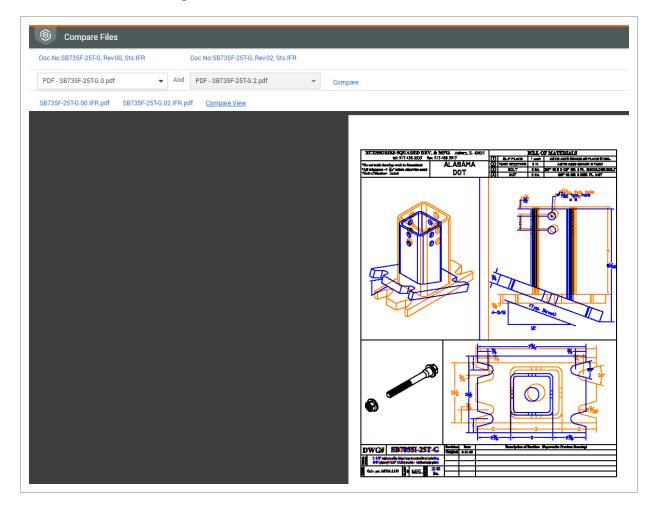
You can only compare two files.

- 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**.

Select files Please select two files to compare	×
Doc.No.:SB735F-25T-G, Rev:00, Sts:IFR:	Doc.No.:SB735F-25T-G, Rev:01, Sts:IFR 🔹
☑ SB735F-25T-G.0.pdf	Doc.No.:SB735F-25T-G, Rev:01, Sts:IFR Doc.No.:SB735F-25T-G, Rev:02, Sts:IFR
	Cancel Compare
	Cancer

The two documents are overlaid on top of each other in the Viewer. Items shown in blue indicate the older revision. Items showing in orange indicate the newer revision. Items showing

#### in black indicate no change.



# 2.5 Step by Step 3 — Compare two revisions of the same document from the PDF Viewer

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

You can only compare two revisions.

- Document No: 00-TE-0001 Rev. C Sts: IFI TRANSMITTAL FILE VIEWER USER ACCESS DETAIL LINKS COMMENTS HISTORY File names: PDF - SB735F-25T-G.2.IFR.pdf • Close Revision A - A Compare -Save Select one Viewing tools Markup Meas Revision A - A (m) 3 5 Fit Page 4 Next Document > (-) (+) Ð 1 (1/1) Revision B - B Q D 0 D B as possible. There may be some small differences in items such as text style when rendered
- 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 older revision. Items showing in orange indicate the newer 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.

Actions 🕶 🔶 💌 Transmit	- 3	•	<u>+</u>	
Admin •	8	)		Documer
Check in				
Check out				76575TY
Comments		P		7777777
Compare				<u>88-999</u>
Duplicate		P		8888888
Generate document hyperlink		P		9999999
Generate hyperlink for the current r				A-G-EL-0
Manage Stamp	Post-St	amp		A-G-EL-0
Print selected view files	Pre-Sta	mp		A-G-FP-0
Resubmit for review		P		A-G-FP-0
		P		<u>A-G-P-00</u>

#### 3. Select the date.

Post-Stamp		×
*Stamp date		
04-05-20		<b>61</b>
	Cancel	Save

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.

Actions 🕶 🔶 💌 Transmit	•	<u>+</u>	
Admin •	P		Docume
Check in			
Check out			76575TY
Comments	P		7777777
Compare			<u>88-999</u>
Duplicate	P		8888888
Generate document hyperlink	P		9999999
Generate hyperlink for the current r			A-G-EL-0
Manage Stamp	Post-Stamp		A-G-EL-0
Print selected view files	Pre-Stamp		A-G-FP-C
Resubmit for review	P		A-G-FP-0
	P		<u>A-G-P-00</u>

# 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.

C	Actions 💌 🔶 💌 Transmit 💌	▶ • ⊥
	Comments	Document No. 🕇
	Check out	-
1	Check in	A-BPO-101
1	Resubmit for review	A-BPO-102
	Compare	A-BPO-103
	Duplicate	A-BPO-104
I	Generate document hyperlink	A-BPO-105
1	Generate hyperlink for the current r	A-BPO-106
	Print selected view files	A-BPO-108
	Admin 🕨	A-BPO-109
	Share document	A-BPO-110
-		<u>A-BPO-111</u>

2. Select the view files you want to print.

Sele	ct files	s to print			
Group Do	by cument	No. 🔘 File type			
	ect all fi				
		ument 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
	tal item	s: 3 Selected items: 3 Selected file size: 2	273 KB		
То					

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.

Actions 💌 🕘 💌 Transmit	• 🗗 • 🔟
Comments	Document No. ↑
Check out	=
ii Check in	A-BPO-101
Resubmit for review	A-BPO-102
ii Compare	A-BPO-103
II Duplicate	A-BPO-104
Generate document hyperlink	A-BPO-105
iii Generate hyperlink for the current r	A-BPO-106

#### 2. Click Yes.

🕂 Resubmit for review	$\times$
Do you want to resubmit for review the selected documents?	
Yes	No

# **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.

valla	ble columns				Sele	ected	columns				
Se	arch		Q			Searcl	h			Q.	
	Column name	Alternative name		<b>→</b>			Column name	Alternative name			t
	Area			4			Document No.	Document No.		*	Т
	Date recorded						Rev	Rev			
	Date released						Sts	Sts			
	Due Date							· · · · · · · · · · · · · · · · · · ·			
~	Favorite	Favorite	71				Document title	Document title	6		
	From company	_					Discipline	Discipline	6		
	From user						Category	Category	6		
	Initiator		-				Туре	Туре	6	-	

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 Q			
≍=	PDF	MSO	DWG	Other	☆ 👃
					-
	٥	-	-		*
	٥	-			*
	٥				☆
	٥				☆

## 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.

Actions 👻 🕣	<ul> <li>Transmit</li> </ul>	• 🕩 • 🔟	
Comments		Document No.	Rev
Check out			
Check in		<u>A-BPO-101</u>	00
Resubmit for review		<u>A-BPO-102</u>	00
Compare		A-BPO-103	00
Duplicate		<u>A-BPO-104</u>	00
Generate document h	yperlink	<u>A-BPO-105</u>	00
Generate hyperlink for the current r		A-BPO-106	00
Print selected view files		A-BPO-108	01
Admin	,	Assign document access	00
Share document	,	Manage document access	04
	P	Restricted Document Access	00
	P	Transfer document ownership	02
	P	Delete	08
	P	Replace/Remove view file	Α
	P	Change document details	Α
	P	Document Mask	Α
	P	Manage studio sessions	Α
	P	A-G-EL-0002	в

- 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	5	Selected Users		Clear allocated
Colt Contracting - Search Q		Search		Q
Name		Name	Company	
☑     Gina Jones       ☑     Jacob Palmer       ☑     Jean Black		No reco	rds to display	*
□ Nabil Hassan -				-
□ Grant access to previous and future revisions				
			Cancel	Next

#### 6. Click Next.

#### 7. Select the formats you want to the document to be available in.

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

#### 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.

Actions 🔹 🔶 💌 Transmit	- 1			
Admin •	Assign document access			
Check in	Change document details			
 Check out	Delete			
 Comments	Document Mask			
 Compare 🤇	Manage document access			
 Duplicate	Replace/Remove view file			
 Generate document hyperlink	Restricted Document Access			
 Generate hyperlink for the current r	Transfer document ownership			
 Manage Stamp	1142020-CN-0001			
 Print selected view files	<u>12-001</u>			
 Resubmit for review	<u>14-001</u>			
	<u>15-001</u>			

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

8				Sear	ch document Q	Cancel	ave
ocument No. ↑	Rev	Sts	Name	Access from		Stop future revisi	ions
-BPO-103	00	IFC	Madeline White (Brookman Co.)	Transmittal			
-BPO-104	00	IFC	Madeline White (Brookman Co.)	Transmittal			
R-10032021	A	IFI	Joe Fredericks (Houston Contracting)	Granted Access/ Documer	t Subscription		

- 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.

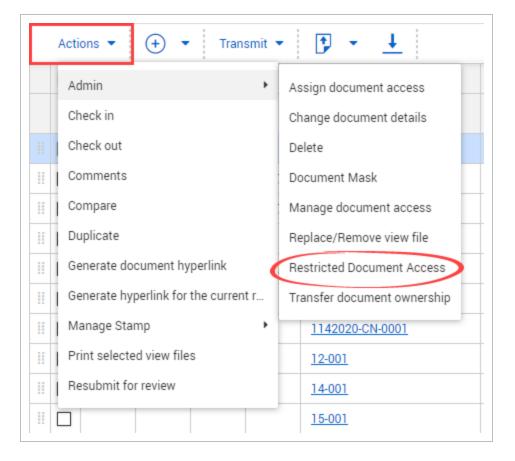
# 3.3 MANAGING RESTRICTED DOCUMENTS

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 <u>support@ineight.com</u>.

#### 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.

Show:       Image: Column operator value         If iter by:       Column operator value         Image: Select one       Select some items. Image: Select some items.	ile selection: 18			~	+		
All <ul> <li>Filter by:</li> <li>Column</li> <li>Operator</li> <li>Value</li> </ul> <ul> <li>Select one</li> <li>Select some items</li> <li>Select one</li> <li>Select some items</li> <li>Select one</li> <li>Select some items</li> <li>Select some items</li> <li>Select one</li> <li>Select some items</li> <l< th=""><th>lear all condition</th><th>ns</th><th></th><th></th><th></th><th></th><th></th></l<></ul>	lear all condition	ns					
Filter by:       Column       Operator       Value <ul> <li>Select one</li> <li>Select some items</li> <li>Select some items</li> <li>Select solect some items</li> <li>Select some items</li> <li>Sele</li></ul>	Show:						·
• Select one           • Select one           • Select some items           • Select some items             • MD         • Select one           • Select one           • Select some items           • Select some items             • MD         • Select one           • Select some items           • Select some items           • Select some items             • MD         • Note: The restriction applies to Company Uploaded documents, incoming and outgoing transmittals.           • Select some items           • Select some items             • Note: The restriction applies to Company Uploaded documents, incoming and outgoing transmittals.             • Edit user list Clear all users         • Clear selected users	All				~	Documents that my company has uploaded	
	Filter by:	Column		Operator		Value	
Note: The restriction applies to Company Uploaded documents, incoming and outgoing transmittals.          et users who have access to the restricted document         Edit user list Clear all users	+	Select one	-	Select one	-	Select some items 💌 🛞	
et users who have access to the restricted document  Clear all users Clear selected users	(+) AND	Select one	-	Select one	-	Select some items 💌 🗙	
							-
Company Name					, incoming	and outgoing transmittals.	
	t users who have	e access to the restr	ricted docun	nent	, incoming	and outgoing transmittals.	
	t users who have	e access to the restr Clear all users	ricted docun	nent	, incoming		

#### 5. Click Edit user list.

- 6. Select the company.
- 7. Select the contact and click the **arrow icon**.

elect contacts to have access to restricted document		C	ontacts allocated t	o have r	estricted access	Clear allocat
19.1 Company 👻 Search C	2		Search			Q
✓ Name			Name		Company	
SD SD	^ L			No reco	rds to display	
				101000	nus to uispity	
	-					

- 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.

Γ	Actions 👻 🔶 👻 Transmit 🗸	•	<b>P</b> • <u>↓</u>
	Comments		Document No. 1
	Check out		
	Check in		A-BPO-101
I	Resubmit for review		A-BPO-102
	Compare		A-BPO-103
	Duplicate		<u>A-BPO-104</u>
Ξ	Generate document hyperlink		<u>A-BPO-105</u>
Ξ	Generate hyperlink for the current r		<u>A-BPO-106</u>
Ξ	Print selected view files		<u>A-BPO-108</u>
Ξ	Admin •		<u>A-BPO-109</u>
I	Share document +		<u>A-BPO-110</u>
			A-BPO-111

#### 3. Click Copy link.

Revision:	1-2182020-NPDF-002 C	
Status:	IFI	
Selected docu	ument 🔘 Latest document	
https://deviteam		
	nbinder.com/TeamBinder20250/Integration/tbOpenItem.aspx?B &ProjNo=TRAINING01	

#### 4. Click Close.

- 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

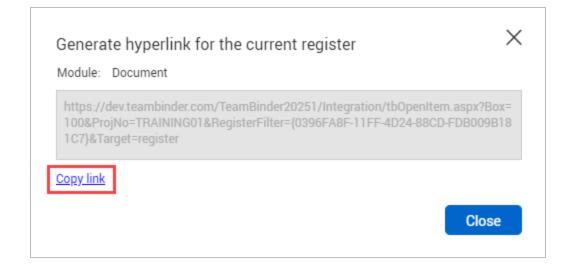
A hyperlink to the current **Documents Register** can be sent to another user that will take them directly to the current Register view.

### **3.5.1** To generate a hyperlink for the current Register:

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

Actions 🔹 🕞 👻 Transmit 👻 💽 👻 🔔						
	Comments		Document No.			
	Check out					
	Check in		A-BPO-106			
	Resubmit for review		<u>A-BPO-108</u>			
Ξ	Compare		<u>A-BPO-109</u>			
1	Duplicate		<u>A-BPO-110</u>			
	Generate document hyperlink		<u>A-BPO-111</u>			
8	Generate hyperlink for the current r		<u>A-BPO-112</u>			
Ξ	Print selected view files		A-BPO-113			
-	Admin •		<u>A-BPO-114</u>			
	Share document		<u>A-BPO-115</u>			
	□   P		<u>A-BPO-116</u>			

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.

Actions 🝷	🗩 🔹 Transmit	• • •
Comments		Document No.
Check out		=
💠 Check in		<u>A-BPO-106</u>
🛛 Resubmit for revie	w	A-BPO-108
Compare		A-BPO-109
II Duplicate		A-BPO-110
Generate documer	nt hyperlink	A-BPO-111
Generate hyperline	k for the current r	A-BPO-112
Print selected view	vfiles	A-BPO-113
# Admin	,	Assign document access
Share document	,	Manage document access
	P	Restricted Document Access
	P	Transfer document ownership
	P	Delete
	P	Replace/Remove view file
	P	Change document details
	P	Document Mask
	B	Manage studio sessions
	P	<u>A-G-P-0001</u>

#### 4. Select Replace.

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

1-2182020-NP C IFI 10. Revision B.png Replace Copy Redlines Add	es 🔻 🛃 Add files	ocument No.	Rev	Sts	Current file	Remove action	Redline markups	New file	9
		-2182020-NP	с	IFI	10. Revision B.png	Replace	<ul> <li>Copy Redlines</li> </ul>	▼ 🛃 Add	files
	1						1		
	1						'		
	I.								
	I						, i		
	I								
	I								

#### 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.

	Actions 🔹 🔶 💌 Transmit	• 🔁 • 🛨	
	Admin 🕨	Assign document access	Rev
	Check in	Change document details	-
Ш	Check out	Delete	с
	Comments	Document Mask	А
Ш	Compare	Manage document access	J
Ш	Duplicate	Replace/Remove view file	В
Ш	Generate document hyperlink	Restricted Document Access	В
Ш	Generate hyperlink for the current r	Transfer document ownership	D
Ш	Manage Stamp	1142020-CN-0001	А
Ш	Print selected view files	<u>12-001</u>	KNRV3
	Resubmit for review	<u>14-001</u>	С
Ш		<u>15-001</u>	20

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

0-NP C IFI 10. Revision B.png Remove Remove Redlines	1-2182020-NP C IFI 10. Revision B.png Remove Remove Redlines

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.

	Actions 🔹 🔶 👻	Transm	it 🕶 📑 👻 💷		
	Comments		Document No.		
	Check out		-		
-	Check in		A-BPO-106		
	Resubmit for review		A-BPO-108		
	Compare		A-BPO-109		
	Duplicate		A-BPO-110		
	Generate document hype	erlink	A-BPO-111		
	Generate hyperlink for th	ne current r	A-BPO-112		
1	Print selected view files		A-BPO-113		
	Admin	,	Assign document access		
	Share document	,	Manage document access		
1		P	Restricted Document Access		
		P	Transfer document ownership		
1		P	Delete		
1		P	Replace/Remove view file		
		P	Change document details		
		P	Document Mask		
		P	Manage studio sessions		
		P	A-G-P-0001		

- 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.

Company	Contact	
Select a company	✓ Select a contact	•
_ ·	ferred to the latest revision of the document. Il revisions of the selected documents.	

## **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.

	Actions 💌 🛨 💌 Transmit	- 🗊 - 🕂		
	Admin •	Assign document access		
	Check in	Change document details		
	Check out	Delete		
11	Comments	Document Mask		
11	Compare	Manage document access		
11	Duplicate	Replace/Remove view file		
11	Generate document hyperlink	Restricted Document Access		
	Generate hyperlink for the current r	Transfer document ownership		
	Manage Stamp 🕨	1142020-CN-0001		
	Print selected view files	<u>12-001</u>		
	Resubmit for review	<u>14-001</u>		
		<u>15-001</u>		

- 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.

Docum	nent Ma	sk					$\times$
					used to valida nent Register.		ber
Charate	ers defined	by the d	locumer	nt mask(	s)	$\sim$	
Create a	document	number	mask:				1
N	А	#	x	-	Other		
						Clear	$( \cdot )$
Docume	nt masks c	reated:					
	Docume	nt mask	number				
						*	$\sim$
							$\sim$
		h	the start			<b>T</b>	L.
Docu	ment Num	ber leng	ith shou	id be sar	ne as the doo	ument mas	K
					Cance		Save

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

- 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.

			DETAIL	LINKS	COMMENTS	FILE VIEWER	USER ACCESS	TRANSMITTAL HISTORY	HISTORY			
Iail (1)	(	Ð 🖯										Close
iaii (1)		Mail ref.	Subject			Mailbox	Туре	Date	Status	From	From company	
ocument (1)		HCC-00113	DIL-20200401-001			Mail	LETTER	01-04-20	CLOSED-OUT	Greg Harrison	Houston Contracting	

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

Search chu	eria for Docume	ent	-				
Show:							
Latest unre	estrained			-	Documents that I can	download	*
Eilter be	Column		Operator		Value		
Filter by:	Column		Operator	_			
<b>(+)</b>	Select one	*	Select one	*	Select some items	• 🛞	
					Select some items	• 😣	

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

			*		
Personal To:	Responses:	New mail	Outstanding mail     T	Select one or more links from the search	esults
Filter by: Column Operator	- Value	C	lear Search		
			+ +		

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

	arch criteria for	Mail - Inbo	x -			Selected work items to link
Sh	ow:		Responses:	*		Select one or more links from the search results
F	ersonal		👻 💿 All mail 🛛 🔍 New n	nail 🔘 Out:		
То			From:	-		
(				• •		
			Clear	Search		
Se	arch results					
	Mail ref.	Received	Subject	То	<b>→</b>	
~	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		
		31-03-20	RE: 111111111111111111111111111111111111	Greg Harris		
_	00001.01			Greg Harris		
	00001.01 HCC-00112	31-03-20	RE: DIL-20200331-001	oreginamis		

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

			DETAIL LINKS	COMMENTS	FILE VIEWEI
Mail (29)	Œ	$\ominus$ $\overline{+}$			
		Document No.	Title	Rev	Sts
Document (33)		00000000	Testing PH - Vendor	А	test1
Transmittal (4)		000000000000000000000000000000000000000	Testing long document number	А	IFI
Form (7)		00000000-TA-1027-1131	Testing processing attachments-11/20zasd	В	IFI
		00000000-TA-1027-1132	Testing processing attachments-11/20zasd	в	IFI
Gallery (58)	-	0000000-TA-1027-1134	Testing processing attachments-11/20zaed	0	IEI

# 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.

	DETAIL LINKS	COMMENTS	FILE VIEWER	USER ACCES	S TRANSI	MITTAL ORY	HISTORY	
							Close	
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	

#### 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.

	DETAIL	LINKS COMMEN	TS FILE VIEWER USER ACCESS TRA	INSMITTAL HISTORY
a 🕑				Close Search all History Q
Date	Event Type	Action By	Description	Notification Details
25-11-19 10:35 PM	Document Uploaded	shanik,a perer,a (titan)	More Information	
25-11-19 10:35 PM	View Document Details	shanik,a perer,a (titan)		
25-11-19 10:36 PM	Document Revised	shanik,a perer,a (titan)	More Information	
25-11-19 10:36 PM	View Document Details	shanik,a perer,a (titan)		
25-11-19 10:36 PM	View Document Details	shanik,a perer,a (titan)		
25-11-19 10:43 PM	Recipient Company Docum	shanik,a perer,a (titan)	Access granted to Transmittal recipient company	
25-11-19 10:46 PM	Recipient Company Docum	shanik,a perer,a (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	
		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.

	DETAIL	LINKS	COMMENTS	FILE VIEWE	ER USER ACCESS	REVIEW STATUS	TRANSMITTAL HISTORY	HISTORY	
									Close
<b>Review status</b> <sup>Ieleased</sup> Review coordina	ator details								
Name: Company: Total days scheduled Total days to-date:	Joe Fredericks Houston Contracti : 2 65	Total days left: ng Scheduled comp Actual completio	letion: 01-02-21	otes:					
Reviewer details								Location o	freview
	Rev	iewer company		Se	Total days schedul	Total days to-d	Total days I	Scheduled compl	etion
Reviewer name	1101				-	0	0	19-01-21	
Reviewer name Adrian Hinkley		ineering Project Ser	vices	1	2	0	0	19-01-21	
	Eng	ineering Project Sen ineering Project Sen		1	2	8	0	19-01-21	

## • 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

			DETAIL	LINKS	COMMENTS	FILE VIEWER	TRANSMITTAL HISTORY			
Document (2)	•	$\Theta$								Close
		Document No.	Title		Rev	Sts	discipline	From	From company	Link type
Submittal Deliverable (1)		000000000000000000000000000000000000000			A	IFI	001	Greg Harrison	Houston Contracting	Document annotation
		00000000-TA-1027-1130			A	IFC	ADMIN	Greg Harrison	Houston Contracting	Document annotation

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.

	DETAIL LINKS	COMMENTS FIL	E VIEWER USER ACCESS	RANSMITTAL HISTORY	
-					Close
∧ Incoming Transm	ttals Latest	-			
Recipient	Company	Package	Transmittal No.	Rev	Version
Greg Harrison	Houston Contracting		TRAINING01-DES	0010 B	B.01
chathuranga wijesinghe	Houston Contracting	CN_HDOC-1232	020-0002 <u>HCC-000215</u>	В	B.01
ABC BC	Houston Contracting	CN-221_SP-000	3 <u>TITAN-000032</u>	В	B.01
					•
∧ Sent Transmittals	Latest	-			
Recipient	Company	Package	Transmittal No.	Rev	Version
Asela Goonatilleke	QA Software Pty Ltd		TRAINING01-DES	0025 B	B.01
Nadee Kotuwegedara	QA Software Pty Ltd		TRAINING01-DES	0025 B	B.01
Greg Harrison	Houston Contracting		TRAINING01-DES	0010 B	B.01

NOTE Click on the hyperlink to view the transmittal.

## **3.1 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

			DETAIL	LINKS	COMMENTS	FILE VIEWER	TRANSMITTAL HISTORY	Y.		
							HISTORY			
Document (2)	0	$\Theta \ominus$								Close
		Document No.	Title		Rev	Sts	discipline	From	From company	Link type
Submittal Deliverable (1)		000000000000000000000000000000000000000	The second se		A	IFI	001	Greg Harrison	Houston Contracting	Document annotation
		00000000-TA-1027-1130			A	IFC	ADMIN	Greg Harrison	Houston Contracting	Document annotation

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.



# CHAPTER 4 – APPLYING DOCUMENT ADMINISTRATION SETTINGS

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

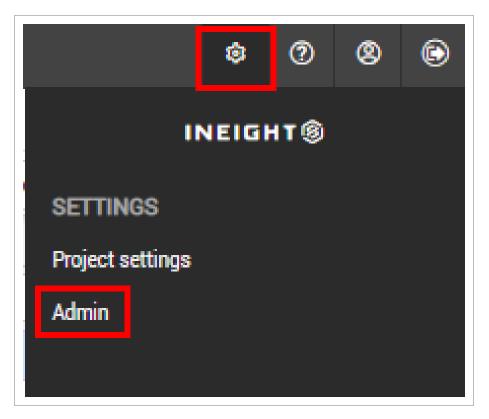
See the links below for information on applying document administration settings.

## 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.

dministration «	A	Actions 👻 🕂 🕀	C Rule Type:	Upload 🗸 🗸	Search document rule	۹
Manage user access	Ru	ule Type: Upload				
Define/Maintain user access and security		Title 🧻				
Configuration tables		Colt Contracting Upload Rule				
Define/Maintain configuration		EPS Document Upload Rule				
tables		HCC Upload Rule				
Manage document rules Define/Maintain document		Test Upload Rule				
workflow rules						
Project calendar						
Define/Maintain working days						
	•					ŀ
	Ite	ms: 4 Selected items: 0				

- 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.

		DETAIL	s	ALLO	CATIONS						
										Cancel Duplie	cate Save
Title:											
							Upload do	cument to Hold	ling Area		
eld se	lection: 🛛 Show Selecter	d Only									
atus		Select All	Discipli	ne	Select All	Catego	ry	Select All	Туре		Select A
Sea	rch sts	Q,	Sea	rch discipline	Q	Sea	rch category	Q	Sea	arch type	Q
	Any			Any			Any			Any	-
	Accepted for Construction	1		Administration			Cable Schedules			Certificate	
	As Built			Architectural			General Arrangements			Contract	
	Detailed Design			Civil			Isometrics			Drawing	
	Issued for Approval			Electrical			Piping and Instrument Dra	wings		Drawing-Shop	
	Issued for Construction			Fire Systems			Plans & Elevations			Drawing-Sketch	
	Issued for Information			Geotechnical			Plot Plans			Image	
	Issued for Review			Instrumentation			Route & Profile drawings			Manual	
	Issued for Tender			Landscape						Model	
	Issued for Use			Lifts & Escalators						Plan	
	Preliminary Design			Mechanical						Procedure	
				Plumbing						Register/List	
		-			· · · · · · · · · · · · · · · · · · ·			-		D 1	•

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

	DETAILS	ALLOC	ATIONS	HOLDING AREA			
		•				Cancel	Duplicate Save
splay: 🔘 User 🔿 Depar	tment O Company						
lect companies, departme	nts and users to allocate		Allocated comp	anies, departments and	users		Clear alloca
Colt Contracting	✓ Search	Q	Search				
] Name			Company		Department	Name	
Amy Sanders		<b>↓</b>	1	I	No records to di		
] Gina Jones					No records to dis	shiay	
Jacob Palmer							
Jean Black							
Ray Colt							
Rose Drake							
Terry Johnson							

# • 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

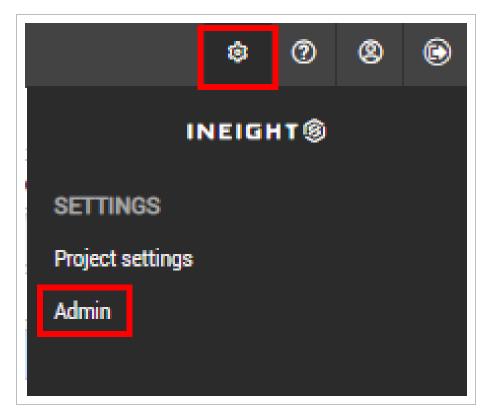
InEight Document can automate the distribution of documents uploaded to the system via rule-based distribution rules which control:

- 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**.

Ξ ŵ New ∨ Document	t / Adn	nin / ManageDocumentRules $ \smallsetminus $	InEight Document Training Project M 🗸			\$ @ &	
Administration 《		Actions 👻 🕀 🕀 🛇		C Rule Type:	Distribution 👻	Search document rule	۹
Manage user access	R	ule Type: Distribution					
Define/Maintain user access and security		Title ↑					
Configuration tables		Architectural Rule					*
Define/Maintain configuration tables		Structural Distribution Rule					
Manage document rules     Define/Maintain document     workflow rules      Project calendar     Define/Maintain working days	4						• •
	lt	ems: 2 Selected items: 0					
© 2021 InEight Inc.   <u>v 21.05.00</u>						INEI	GHT

- 4. Click the **plus icon**.
- 5. Enter in the title for the distribution and select a value from the drop-down menu.

	DETAILS	DISTRIBUTION			
				Cancel Duplicate	Save
Title:					
Document Field		Value			
Select a Field		👻 Select Attribute Va	ue		

- 6. In the **Distribution** tab, select the company.
- 7. Select the contact and click the **arrow icon**.

		DETAILS		DISTRIBUTION							
				-				Cancel	Du	plicate	Save
ec	t contacts to allocate			Allocated contacts						<u>0</u>	lear alloc
Co	olt Contracting 👻 Search	Q		Search							C
]	Name	<b>Г</b>	<b>→</b>	Name	Company		PDF	DWG	DOC	OTHER	Access
]	Amy Sanders	A	,			No rec	ords to d	splay			
3	Gina Jones					Horee	01001000	opidy			
ו	Jacob Palmer										
ו	Jean Black										
	Nabil Hassan										
-	Habi Hassan										
	Ray Colt										
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	Ray Colt										
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כ	Ray Colt Rose Drake										

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

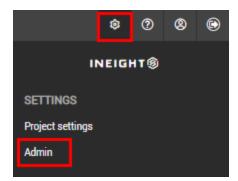
DISTRIBUTION	HISTORY									
						Cancel	Duplicat	te	Save	;
Allocated contacts								<u>Clea</u>	r alloo	ate
Search									(	2
Name	Company	PDF	DWG	DOC	OTHER	Access From		Notify		
Gina Jones	Colt Contracting					01-01-2000			Θ	4

NOTE	If a person removed notifications from their user preferences and <b>Notify</b> is
NOTE	selected, they will still receive a notification.
	• The distribution rules a user belongs to can also be reviewed and maintained via the <b>Distribution Matrix</b> tab in the contact details screen.
	<ul> <li>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.</li> </ul>
	<ul> <li>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.</li> </ul>

## 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.

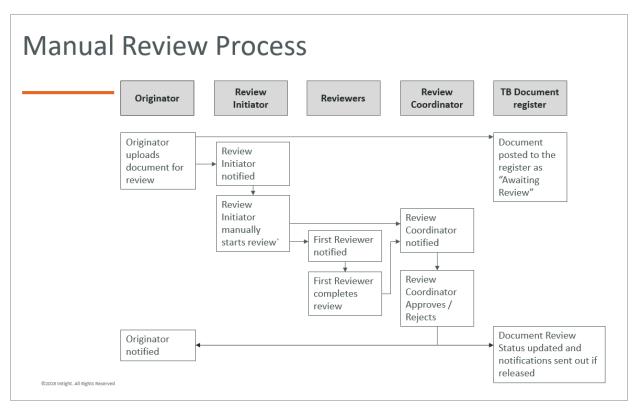
## **5.1 OVERVIEW**

There are 8 steps in the Document Review (manual workflow) process once a restrained document<sup>1</sup> 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.
- 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.

<sup>1</sup>To be passed through a workflow.

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 resubmit 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).

(8)	) New document									
					DETAIL					
A	ctions 🝷 📑 🖿	🕑 Ch			ument details				Cancel	Save 🔻
Fil	es No file has beer Please select a preview.				* Document No. (j) QAS-PLAN-L1-004 * Title Site Plan					^^
_	Attach files	Eutoneion	Size		* Revision A - Rev A		*	* Status IFR - Issued fo		•
	File name Site Plan.pdf	Extension pdf	660 KB	⊗ ^	* 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.

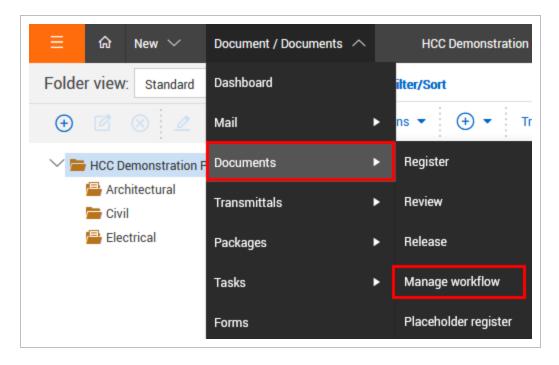
NOTE	<ul> <li>If Auto Activation of the review process is enabled, the first reviewer in the relevant review team is automatically notified to complete their review. For Parallel based reviews, each reviewer is notified at once.</li> </ul>
	<ul> <li>If the workflow is Manual (auto Activation was not 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.</li> </ul>
	<ul> <li>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.</li> </ul>

## **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.

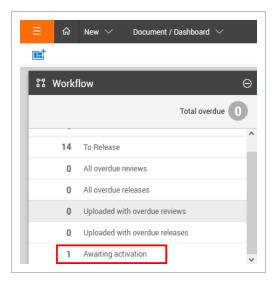
The review initiator can activate the workflow on a per document basis or for a batch of documents.

To activate the default rules based review team:



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

2. Alternatively, from the Dashboard Workflow widget, select Awaiting activation.



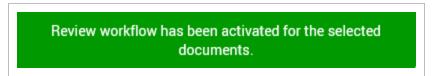
3. At the **Manage Document Workflow** screen, by default "Review not started" is listed. Select the document(s) to activate the review process.

	Filter/	Sort								View: System
4	ctions •	Acti	ivate Batc	h comment 💽 👻			С Мапа	ge columns 🛛 📜	Show: Review not s	started 👻 S
	9	<b>P</b>	Redlines	Document No. ↑	Rev	Sts	Document title	Discipline	Category	Workflow members
					•	-	-	-	-	
~			6	QAS-PLAN-L1-0001	A	IFR	Site Plan Level 1	ARC		ľ
~			۵	QAS-PLAN-L2-002	А	IFR	Site Plan Level 2	ARC		Ľ
			0	QAS-PLAN-L3-003	A	IFR	Site Plan Level 3	ARC		Ľ
			0	QAS-PLAN-L4-004	A	IFR	Site Plan Level 4	ARC		Ľ

- 4. Click the **Activate** button.
- 5. By default, the option **Default Workflow** is selected, click **OK**.

(i) Activate review	×
The workflow for the selected document options below to continue.	ts will now be activated. Please select either
O Default workflow (j)	
<ul> <li>Custom workflow (i)</li> </ul>	Cancel Apply

6. The review process will be activated using the rules based review team each document relates to.



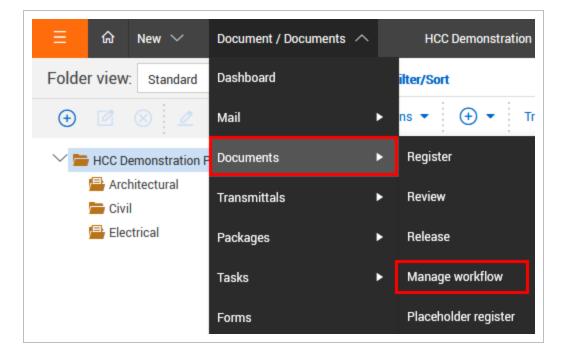
NOTE	<ul> <li>You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending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

## 5.4 ACTIVATING A CUSTOM WORKFLOW

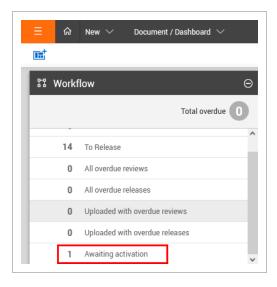
The review initiator has a choice of using the default rules based review team or using a custom workflow that can be defined from scratch or based on a predefined free-form review team.

#### 5.4 Step by Step 1 — Activate a custom workflow

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



2. Alternatively, from the Dashboard Workflow widget, select Awaiting activation.



3. At the **Manage Document Workflow** screen, by default "Review not started' is listed. Select the documents to activate the review process.

	ធ	New	V Docun	nent / Document / Workflow $ \smallsetminus $		HCC Demons	tration Project   UITST2 🗸			
,	<b>Filter</b> /	Sort								View: System
A	Actions 🖣	Acti	vate Batch	n comment 📑 👻			C Manag	ge columns 🛛 📜 🤤	Show: Review not sta	arted 👻 Se
	9	<b>P</b>	Redlines	Document No. ↑	Rev	Sts	Document title	Discipline	Category	Workflow members
					•	-		-	-	
~			٥	QAS-PLAN-L1-0001	А	IFR	Site Plan Level 1	ARC		Ø
~			۵	QAS-PLAN-L2-002	А	IFR	Site Plan Level 2	ARC		ľ
			٥	QAS-PLAN-L3-003	А	IFR	Site Plan Level 3	ARC		ľ
			٥	QAS-PLAN-L4-004	A	IFR	Site Plan Level 4	ARC		Ľ

- 4. Click the **Activate** button.
- 5. At the next window select **Custom Workflow** and click **Apply**.

Activate review	×
The workflow for the selected documents will now be activated. Please select options below to continue.	either
O Default workflow (i)	
Custom workflow     Cancel     Ap	oply

6. 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.

* Doci	ument review coordinator company:		* Docu	ment r	eview coordinator conta	ict-	Tota	l review duration in (in	nuted) days			
	iston Contracting	•			icks (Houston Contractir		-	and a state of the second s	parca) aujo			2 🗘
	Ilay: All contacts Roles Free form review teams			Alloca	ated contacts, roles and	free form review teams						
W	ells Engineering			Se	earch allocated							
	Name		→		Name	Company	Due date	Sequence	Duration (Days)	Optional	Either	
	Anna Smith	^			Madeline White	Brookman Co.		1 🙏	1 🙏			Θ
	Steve Works				Andrew Miller	Brookman Co.		2 🚆	1 🙏			Θ
					Steve Works	Wells Engineering		2 🔔	1 🙏	7		Θ
		~										

- 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 <u>sequence</u> and **review duration** for each reviewer.

Se	arch allocated								C
4	Name	Company	Due date	Sequence		Duration (Days)	Optional	Either	
	Madeline White	Brookman Co.		1	*	1 🌲			Θ
	Andrew Miller	Brookman Co.		2	*	1 🌲			Θ
	Steve Works	Wells Engineering		2	<u>_</u>	1 着	~		Θ

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

- 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 select them via Free
     Form Review teams or Role already defined. Users can be removed or added to the list as required.
  - The reviewers will be 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.

To modify the in-progress workflow:

- 1. From the **Module Menu**, hover over **Documents** and select **Manage workflow**.
- 2. Alternatively, from the Dashboard Workflow widget, select Awaiting activation.
- 3. At the Manage Document Workflow screen, change the option to view "Reviews in progress".
- 4. Click  $\square$  icon against the document to modify the workflow.

View: Unsaved (Syr											•
A	Actions .	Acti	vate Batcl	h comment 📑 👻		С	Manage columns 🛛 🖡 🗐	Show: Review in pro	ogress 🔻	Search all WorkFlow	Q
	9	<b>P</b>	Redlines	Document No. 1	Rev	Sts	Document title	Discipline	Category	Workflow members	
					-	-	=	-	-		
~			٥	QAS-PLAN-L1-0001	А	IFR	Site Plan Level 1	ARC		Ø	
			٥	QAS-PLAN-L1-105	А	IFR	Site Plan	ARC		ø	
			٥	QAS-PLAN-L2-002	A	IFR	Site Plan Level 2	ARC			
			6	QAS-PLAN-L3-003	А	IFR	Site Plan Level 3	ARC		ø	

5. Add/Remove members from the workflow or modify the sequence and durations for each reviewer as required. Reviewers who have either completed their review or have been notified

to commence their review cannot be removed or adjusted.

	Document review workflow Document No: QAS-PLAN-L1-0001 Rer. A Sts: IFR										×
Select and active and free form review teams	* Document review coordinator company:							view duration in (inputed) da	195		3 🗘
No records to display	Select contacts to allocate Select a company Search all contacts.					eview teams					e members
v		Add members	_ <b>→</b>	] _	Greg Harrison Joe Fredericks	Houston Contracting Houston Contracting	05-08-21 Adjust sequence				Θ

#### 6. Click Save.

NOTE

- To Add / Remove/ or Replace reviewers in bulk, from within the Manage Document Workflow screen, select the relevant workflows, then Actions and choose between:
  - Add Reviewers: To add one or more reviewers to the in-progress workflow for the selected documents.
  - **Remove Reviewers:** To remove reviewers subject to them having not reviewed the selected documents.
  - **Replace Reviewers:** To replace one reviewer with an alternative reviewer for the selected documents, subject to the reviewer being replaced having not reviewed the documents.

▼ Filter/Sort							View: Unsaved (S	ystem) 🔻
Actions 👻 Activate	Batc	h comment 📑 👻		С	Manage columns 🛛 📜	Show: Review in pro	gress 💌	Search all WorkFlow
Add reviewers	es	Document No. 1	Rev	Sts	Document title	Discipline	Category	Workflow members
Remove reviewers			-	-		•	-	
Replace reviewers		QAS-PLAN-L1-0001	А	IFR	Site Plan Level 1	ARC		ø
Release/Reject documents		QAS-PLAN-L1-105	A	IFR	Site Plan	ARC		Ø
Manage studio sessions		QAS-PLAN-L2-002	A	IFR	Site Plan Level 2	ARC		Ø
		QAS-PLAN-L3-003	A	IFB	Site Plan Level 3	ARC		Ľ

#### **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.

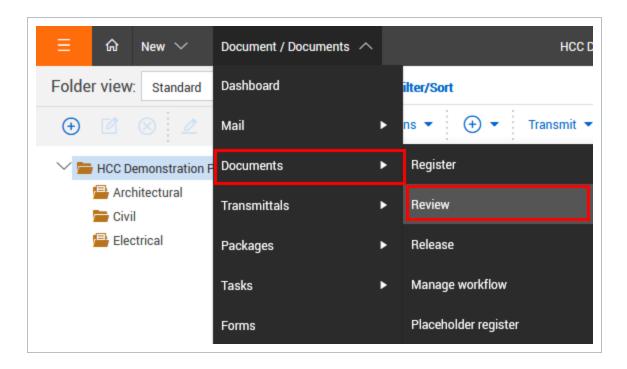
Each reviewer must complete their Review using the **DocumentReview** screen to record their review comments into the system. The Review screen can be used to:

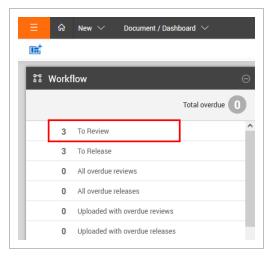
- Redline the drawings on-line.
- Make text comments against the document on-line.
- Attach an external file, for example, an MS Word document of comments.
- Attach a scanned copy of a hardcopy mark-up.

The Review screen 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.

Using the Document Review screen:

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





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

= G	New 🗸 🛛 Document	/ Document / Review $ \smallsetminus $				HCC Demonstration P	roject   UITST2 🗸						© ()	8 (
<b>Filter</b>	Sort										View:	Unsaved (Syster	n)	•
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0 9	Document No.	Rev	Sts	Review history	Required by	Review Sequence	Document title	Discipline	Reviewer Name	Reviewer Company	Comments	Download	Redlines	1
		•	-		<b>= =</b>			•						
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	QAS-PLAN-L3-003	A	IFR	G	05-08-21	1	Site Plan Level 3	ARC	Joe Fredericks	Houston Contracting	۲	Ŧ	8	1

3. 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.

Select at fins         Select at fins         Addem         CI           COLUMN COLOR GOODOOD GO         GO         Select at fins         Select at fins           COLUMN COLOR GOODOOD GO         GO         Select at fins         Select at fins         Select at fins           COLUMN COLOR GOODOOD GO         GO         TO         Select at fins         Select at fins           COLUMN COLOR GOODOOD GO         GO         TO         Select at fins         Select at fins           COLUMN COLOR GOODOOD GO         GO         TO         Select at fins         Select at fins           COLUMN COLOR GOODOODOOD GO         GO         TO         Select at fins         Select at fins           COLUMN COLOR GOODOODOODOODOODOODOODOODOODOODOODOODOOD	Select Hiles U GUMINGO         Select Hiles U GUMINGO           G22232312TE         G           G22232312TE         G           G22232312TE         D           G22232312TE         D           G22232312TE         D           G22232312TE         D           G22232312TE         D           G22232312TE         D           G22232312         D           G22232312         D           G22232312         D           G22232312         D           G22232312         D           G22232312         D           G2232312         A           G2232312         A           G2232312         A     <	Studio session ID	Document No.	Rev		Discipline	Category
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- 4. Click the **Redlines** icon to open the document in the online viewer (if activated on your project). The document can be marked up (red-line) and text comments can be added.
- 5. Click the **Comments** icon to add electronic comments to the documents.
- 6. In the new window, click the **plus** button to add a comment.

Document	No: QA	S-PLAN-	L1-105 Re	v:A Sts:IFR											
					DETAIL	LINKS	COMMENTS	FILE VIEWER	USER ACCESS REVIE	W STATUS TRANSMI HISTOP	YAL HISTORY				
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			-	Ŧ	Ŧ									<b>.</b>	
ø		<u>01</u>	04-08-21	*	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Review of measure			Major 👻		^

• To attach external files, click **Attach Files** and select one or more files to attach and click **Open**.

Ø New Comment		
* Comments		Plain Text
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		Cancel Save
© 2021 InEight Inc.   <u>v 21.05.09</u>		INEIGHT

- Select a **Category** for your comment (optional).
- A comment raised on behalf of a 3rd party is specified in the **Raised by** value.
- Click **Save** when finished to return to the Comments window and close the window to return to the Document list in the Review screen. The comment icon changes to a red icon to indicate that there is an outstanding comment against the document.

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9	Document No.	Rev	Sts	Review history	Required by	Review Sequence	Document title	Discipline	Reviewer Name	Reviewer Company	Comments	Download	Redline
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2	QAS-PLAN-L1-105	A	IFR	U	05-08-21	1	Site Plan	ARC	Joe Fredericks	Houston Contracting	<b>C</b> .	Ŧ	6
כ	QAS-PLAN-L2-002	A	IFR	٩	05-08-21	1	Site Plan Level 2	ARC	Joe Fredericks	Houston Contracting	Ţ.	Ŧ	6
	QAS-PLAN-L3-003	A	IFR	G	05-08-21	1	Site Plan Level 3	ARC	Joe Fredericks	Houston Contracting		¥	8

7. Once your reviews are complete, from the Document Review screen, select the Document/s and click **Complete**.

= 6	ରି New 🏏 Document /	Document / Review 🗸				HCC Demonstration P	roject   UITST2 🗸						© ©	<b>8</b> (
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3	QAS-PLAN-L2-002	A	IFR	G	05-08-21	1	Site Plan Level 2	ARC	Joe Fredericks	Houston Contracting	(F	¥	6	
	QAS-PLAN-L3-003	A	IFR	•	05-08-21	1	Site Plan Level 3	ARC	Joe Fredericks	Houston Contracting		Ŧ	8	

#### NOTE

- The Review Coordinator when viewing the **All** or **Where I am the review Coordinator** option will also see a **Reviewer** and **Review Company** column.
- 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 may be necessary if a reviewer is unable to review a document for any reason
  and hence the review process may otherwise be held up.
- The document will continue to be listed as awaiting review until the Completed box is selected and saved.
- On completion of the review, the next reviewer will be notified to complete their review (serial workflows).
- InEight Document sends out automatic reminders via email if reviews are not completed by each reviewer within the pre-determined durations.
- On completion of the review the review coordinator will be notified.
- Once the last reviewer in a serial or parallel review workflow completes their review the review coordinator will be notified that all reviews have been completed.
- If enabled the **Send to Coordinator** box will complete the workflow process and pass control of the document to the review coordinator bypassing all other reviewers who have not yet completed their reviews.
- The review window can be customized to control the columns that are displayed by going to Manage Columns.
- 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.

#### **5.6.1 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. 1	Rev	Sts	Review status	Review history
		•	•	=	
	<u>A-G-FP-0005</u>	D	IFC	~	Ŀ
	CN-632021-001-CN-632021	SD1	IFR	~	G
	TE-0001-625-PRD-DATA-OU	A	IFR	~	Ŀ
	TE-0001-625-PRD-DATA-OU	A	IFR	~	G
	TE-0001-625-PRD-DATA-OU	В	IFR	~	Ŀ
	TE-0001-629-SHP-DWG-OU	А	IFR	~	G
	TE-0001-630-SHP-DWG-OU	В	IFR	~	G

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.

1	Sts 🗙 🕇 Di	scipline 🗙				
		Document No. ↑	Rev	Sts	Review status	Review history
			•	-		
⇒ Sts	: IFC					
	Discipline: AR	CH				
		<u>A-G-FP-0005</u>	D	IFC	~	Ŀ
⇒ Sts	: IFR					
	Discipline: 8M	ILES				
		CN-632021-001-CN-632021	SD1	IFR	~	Ŀ
	Discipline: CIV	-MD				
		TE-0001-625-PRD-DATA-OU	A	IFR	~	Ŀ
		TE-0001-625-PRD-DATA-OU	A	IFR	~	Ŀ
		TE-0001-625-PRD-DATA-OU	В	IFR	~	Ŀ
		TE-0001-629-SHP-DWG-OU	A	IFR	~	Ŀ
	Discipline: STR	U				
		TE-0001-630-SHP-DWG-OU	В	IFR	~	Ŀ

## **5.7 COMMENTING ON DOCUMENTS**

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

To comment on a document:

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

					DETAIL	LINKS COM	MENTS FILE VIEWER U	SER ACCESS TRANSMITTAL HISTORY	HISTORY				
L 🕑 🛙		3 -										Cancel	Sav
Comm_ † 🔋	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by	Commented by company	Comments	Annotation type	File Name	Category	Closed ou
		<b>— —</b>	-	-								-	-
	01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Is this the correction v			Moderate 💌	
									œ				
	02	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Check clearance at L			Major 💌	
									(t)				

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

<b>=</b> =	Rev	Sts	Raised by	Raised by company	Commented by	Commented by company	Comments
		-					
05-08-21	Α	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Is this the correction v
							(†
05	-08-21	i-08-21 A	-08-21 A IFR	-08-21 A IFR Joe Fredericks	-08-21 A IFR Joe Fredericks Houston Contracting	-08-21 A IFR Joe Fredericks Houston Contracting Joe Fredericks	-08-21 A IFR Joe Fredericks Houston Contracting Joe Fredericks Houston Contracting

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

<u> </u>	. 🕀 🕻		•					
	Comm 🏌 🌘	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by
			<b>= =</b>	+	-			
		01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks

5. At the Add Comment window type the comment.

🛞 Ne	ew Con	nment													
Comments														P	lain Te
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Category:															
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Items: 0															
													ncel		ave

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

- 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.

	9	<b>P</b>	P	Document No. ↑	Rev	Sts
					•	•
8		<b>P</b>	P	<u>12345-01</u>	А	IFI
8			P	12345-02	В	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.

<u>↓</u> (+) (E)	$\otimes$	<b>P</b> -
Comment level	0	Item
		_
		02
		01
		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.

Comments
Check clearance at
<b>F</b>
Add response

- 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..

8	Documen	t No: QAS-PLAN-L1-004 I	Rev: A Sts: IFR						
			DETAIL L	INKS	COMMENTS	FILE VIEWER	USER ACCESS	TRANSMITTAL HISTORY	IY
Com	ment File names	PDF - Site Plan.pdf	Ŧ						
	<b>(</b>	8 💽 🗸			Viewing tools	Markup Measure			
	Date	Commented by	Comments		cm ts		larquee 🔾 Lo	upe 🛛 Fit Page 🦂 👃 🖉	a
	05-08-21	Joe Fredericks	Check clearance at Level 1 entrance.	^	۹ ۵				
	05-08-21	Joe Fredericks	Is this the correction version of the plan? It seems to be n	nis	L R I	, ,,			
	05-08-21	Joe Fredericks	Refer PDF file.		0	()		》₩√▶⊒∙	-

- 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.

• 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.
- Click Actions, and then select Delegate Review. This feature is only available from the <u>Review</u> screen.

∃	n New 🗸 De	ocument / Document / Reviev	v 🗸 HCC Der
<b>T</b> Filter/	/Sort		
Actions	•	Save as draft	Complete 🔻
Delegate	review . 1	Rev	Sts
		-	•
	QAS-PLAN-L2-002	А	IFR
	QAS-PLAN-L3-003	А	IFR

3. Select the **Company** and **User** from the **New Reviewer** drop-down menus.

New reviewer		
Select a company		Select a reviewer
Oelegate the review	/ to the	selected user
		the current sequence with:

- 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 <u>Bluebeam</u>.

## 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.

B Houston								
DETAILS	OPTIONS	DOCUMENT ACCESS	UNREG NOTIFICATION	UPLOAD RULES	SINGLE SIGN-ON SETUP	HISTORY	INEIGHT INTEGRATIONS	EXTERNAL INTEGRATIONS
							(	Cancel Save
Activate Microsoft Office Activate link	review integration							

- 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.

Pe	ermissions requested
InE	ight Document
Thi	s application is not published by Microsoft.
Thi	s app would like to:
$\sim$	Have full access to your files
$\sim$	Maintain access to data you have given it access to
$\sim$	View your basic profile
you stat <b>for</b>	epting these permissions means that you allow this app to use data as specified in their terms of service and privacy ement. The publisher has not provided links to their terms you to review. You can change these permissions at s://myapps.microsoft.com. Show details
Doe	s this app look suspicious? Report it here
	Cancel Accept

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.

#### 5.11 Step by Step 1 — 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 <u>Upload of Documents for Review</u>.

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.

T Filter	/Sort								7					
Actions	▼ Ac	ivate	Send	to external review		Batch o	comment 📑 🔻		$\rightarrow$				C =	
rag a col	umn head	ler and	New	Studio Session	hat	columr	ı							
	喝	Re		ng Studio Session			Rev	Sts		ıe	Category	Workflow memb	Tags	
				Studio Session		Ŧ	•		•	•	•			Ξ
		(	New (	Office review			A	IFR				Ľ		
			1	INEIGHT-MAN-000	14			IFR				۲¢		
		I	1	Interoriti Mirait 000	-									

The Activate review dialog box opens.

3. Select **Default workflow** or **Custom workflow**, and then click **Apply**. See <u>Activating a</u> <u>Default Workflow</u> and <u>Activating a Custom Workflow</u> 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 external companies can access the OneDrive account to access the files in review. 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.

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.

#### 5.12 Step by Step 1 — 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.

Considerations: The document must have already been sent as a New Office review in the review workflow register. See <u>Manage the Microsoft Office review workflow</u> for more information about sending a document to Office 365.

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.

	û Docume	nt / Document	/ Review 🗸														0	8
٣	Filter/Sort														View.	System		•
Ac	tions 🔹 📑 😴 🔹								ſ	Save as draft	Complete 🝷 Ċ		ear all filters Mana	ge columns 🗦	Show: Awaiting my review	<ul> <li>Search all R</li> </ul>	eview	c
			e to group by that colu															
ag	a column neader a	na arop it ne	e to group by that colu	nn														
	External review		Document No. 1		Bev	Sts	Review his	Required by		Review Sequence	Document title		Discipline	Category	Review status	Reviewer Name		B
	External review	-	Document No. 🏌	Ŧ	Rev		Review his		Ŧ	Review Sequence		Ŧ	Discipline •	Category -	Review status	Reviewer Name	Ŧ	R
[	External review		Document No. 1	Ŧ	Rev D				Ŧ			Ŧ	Discipline CIV	Category 🗸	Review status			
-				Ŧ			•	8	Ŧ			Ŧ	•	Category	•			Re INE

- 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.

For more information about reviews, see <u>Reviewing Documents</u>.

### 5.13 MANAGE REVIEW COORDINATORS

You can update the review coordinator for a document individually or in bulk.

5.13 Step by Step 1 — Update the review coordinator for a single document

You can edit the workflow members when you want to update the review coordinator for a single document.

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

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Drag	a colun	nn heade	r and drop it	here to group by that o	olum	n												
	۲	唱	Redlines	Document No. 🏌		Rev	Sts	Document title	Discipline	Category	Workflow members							
					Ŧ	•	•	=	•	•								
				000-TE-0001-IDX		D	IFR	Index Sheet	ADMIN		Ľ							
				INEIGHT-ELEC-00003-SH	PD	A	IFB			IFR				Shop drawings	ELEC		Ľ	
7				TE-0001-PRDDATA-1		в	IFR	Piping product data.	PLU	CAR	Ľ							

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.

NBIOR         Image: Company         Image: Company </th <th>Document review coordinator: 🛞 User ု Role</th> <th></th>	Document review coordinator: 🛞 User ု Role												
Add ages Office form review transmitter of the form review	Document review coordinator company:		* Docume	ent revie	ew coordinator contact:			Total review duration in (inputted) da	ys				
Abarban Contracts, noise and tree from review revi	INEIGHT	*					•						
Name         Company         Dur date         Sequence         Duration (Days)         Optional         Ether           Non-conducts display         A         Name         Company         Dur date         Sequence         Duration (Days)         Optional         Ether	Display.  All users  Roles  Free form review teams  Plect contacts to allocate		A	llocated	i contacts, roles and free form	review teams							
No records to display 1 \$ 5 \$ 1 2 2	Select a company   Search all contacts			Search	ch allocated								
	Name Name		$\rightarrow$		Name	Company	Due date	Sequence	Duration (Days)		Optional	Either	
	No records to display	^			the second second	1000		1		5			e
					the second	and the second se		1		5			e

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

5.13 Step by Step 2 — 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.

	Add reviewers Remove reviewers Replace reviewers	ion i												
Rem		iopi	rop it here to group by that column											
		ines	Document No. 1	Rev	Sts	Document title	Discipline	Category	Workflow members					
				•			•	•						
<u> </u>	anage studio sessions		000-TE-0001-IDX	D	IFR	Index Sheet	ADMIN		ß					
		1	A-003	с	IFR	ARCHITECTURAL PARTITIO	ARCH		Ľ					
man			A-C-S-0012.A.IFI	A	IFR	Sections Sheet 1	ARCH		ß					
			A-G-P-0009.B.PD	A	IFR	Roof Plan - East Quadrant	ARCH		ľ					
	œ,		ARCH-DWG-0001	А	IFR	Architectural drawings	ARCH		ď					
]		Ð	ARCH-TE-001-1214	A	IFR	Arch drawing	ARCH	CAR	ď					
]	吗	Ð	ELE-0003-TE	A	IFR	Shop drawings	ELEC		Ľ					
]	anage studio sessions Q.Q. C. Q.Q. C.	e	INEIGHT-ELEC-00003-SHPD	A	IFR	Shop drawings	ELEC		ď					
I			INEIGHT-STRU-00001-SHPD	D	IFR	Steel shop drawing	STRU		ß					
]			TE-0001-1214-SHP-001-1	A	IFR	Shop drawings - light fixtures	ELEC		ß					
1		B	TE-0001-PRDDATA-1	В	IFR	Piping product data.	PLU	CAR	ß					
]		B	TE-0004-713-TE-0004-001-1	A	IFR	Electrical shop drawings	ELEC		ß					

The Replace Review Coordinator dialog box opens.

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

rent retrett oborantator company.		* Document review coordinator contact:	
ocument review coordinator company: Select a company		Select a review coordinator	•

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

### 5.14 DOCUMENT REVIEW APPROVAL/RELEASE

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

Using the Document Release screen:

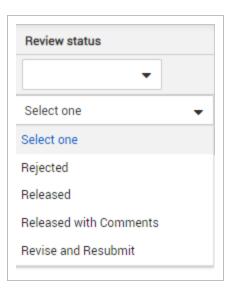
1. From the **Module Menu**, hover over **Documents** and select **Release**.

≣ ଜ	New $\checkmark$	Document / Dashboard A		
<b>••</b>		Dashboard		
🖾 Mail		Mail	Þ	
Personal	-	Documents		Register
		Transmittals	۲	Review
0	New mail	Packages	•	Release
0	Inbox items a	Tasks	•	Manage workflow
0	Sent items a	10363		Manage Worknow
0	To review	Forms		Placeholder register

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

	ଜ	New 🗸 Doc	ument / D	ocument / Release 🗠		HCC Demonstra	ation Project   UITST2 丶					\$ Ø	) ® (
	Filter/S	Sort									V	Tiew: System	•
[	•	<u>↓</u> Send commer	ts to: Se	lect some items 👻					Save as o	Iraft Release	C Manage	columns 🚺 Search all Rele	ease C
<b>V</b>	9	Reviewer details	P	Reviewer comments	Document No. 1	Files	Rev	Sts	Document title	Discipline	Category	Review status	Downloa
							-	•		-	•	-	
~		G	Ţ	P	QAS-PLAN-L1-105		A	IFR	Site Plan	ARC		Released 🗸	Ŧ
~		G	(t		QAS-PLAN-L2-002		A	IFR	Site Plan Level 2	ARC		Rejected 🗸 🗸	Ŧ

- 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.

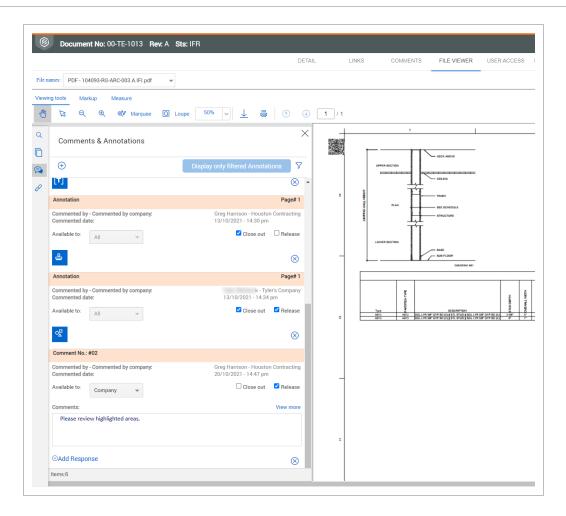


 For multiple documents, select the documents, and then click Actions > Apply review status. The Apply review status dialog box opens, and then you can select the status. You can apply the status to the selected documents only or to all documents in the view.

Apply to selected documents only	
Apply to all listed documents	

Click **Save** to apply the status.

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



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

	<b>Filter</b> /S	Sort			
	•	<u>↓</u> Send commen	ts to: S	elect some items 👻	
	9	Reviewer details	F	Reviewer comments	Document No. 1
$\checkmark$		Ŀ	F	₽	QAS-PLAN-L1-105
		G	ţ+		QAS-PLAN-L2-002

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			_								
ect reviewer con	nments to include w	ith your summa	<u>ary</u>								
ted											
				*							
tachments uploa	ided.										
	ided.			*							
	ided.			*							
Review coordinator's comments     Arial     Table     * Category   Moderate     ✓     Select reviewer comments to include with your summary.     Attach files     ✓   Download all     ✓     Moderate     ✓     Download all     ✓     Download all     ✓     Download all     ✓     The provide the provided selected											

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.

	0	Items	Date	R	Sts	Raised by	Company	Commented by	Comments	Annotation type	File name	Category
~		03	04-08-21	А	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer to comment 1.			Moderate
2		02	04-08-21	А	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 Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Line	Site Plan.pdf Site Plan.pdf	

- To view the redline layers made by reviewers, refer to step 6a.
- 10. Click **Close** when completed to return to the Review Coordinators comments window.
- 11. Use the **Attach files** button to select one or more external files to include as part of your Review Coordinators comments.
- 12. Select a **Category** if required.
- 13. Click **OK** to close the Review Coordinator's comments window.
- 14. From the Release screen, select who the review comments should be sent to: Originator, Reviewers or Document Recipients.

•	Filter/Sort					
•	<ul> <li>↓</li> </ul>	Send commer	nts to:	2 items selected	•	
	R	eviewer details	E	Originator		Document No. 1
				Reviewers		
				Document Recipients		
		Ŀ	F	-		QAS-PLAN-L1-105

15. To release the documents where the above steps have been completed (<u>ensure a release status</u> <u>has been set</u>), click **Release.**.

=	ŵ New ∨ Do	cument / C	locument / Release $  imes $				HCC Demonstration Pro	ject   UITST2 V						\$ 0 8	. 6
<b>T</b> Filte	r/Sort											View: Uns	aved (System	)	•
•	<u>↓</u> Send comme	nts to: 2	items selected 🗸 👻							Save as draft	Release C Mana	ge columns	<b>t</b> ∃ Sea	rch all Release	۹
9	Reviewer details	Ţ.	Reviewer comments	Document No. 1	Files	Rev	Sts	Document title	Discipline	Category	Review status	Download	Redlines	Scheduled Comp	letic
						-	-		•	•	•			<b>—</b>	
	C	Ģ	Ð	QAS-PLAN-L1-105		A	IFR	Site Plan	ARC		Released 👻	Ŧ	6	06-08-21	
3	G			QAS-PLAN-L2-002		A	IFR	Site Plan Level 2	ARC		Rejected 🗸	4	8	06-08-21	

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

NOTE	<ul> <li>If the document is released: The document is distributed automatically using email notifications.</li> </ul>
	<ul> <li>If the document is rejected: only the Originator, Review Team and Admins retain access to the document. Users from the originating company will <u>not</u> receive access even if they are part of the Distribution Rules / Discipline Matrix.</li> </ul>
	<ul> <li>The Document Register is updated with the Review Status applied.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>Use the <b>Review Details</b> link to review a history of who reviewed the document and when.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>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 135.</li> </ul>
	<ul> <li>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).</li> </ul>
	<ul> <li>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.</li> </ul>

#### 5.14 Step by Step 1 — Download prior to consolidation

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

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

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



The PDF files are provided in a zip file.

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

#### 5.14 Step by Step 2 — Change private comments to public

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

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

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

	0	Item	Date		Rev	Sts	Raised by	Raised by company
				<b>H</b>	-	*		
ø					Α.	IFC		
۶					A.	IFC		

#### 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. 1	Rev	Sts	Review status	Review history
		-	-		
<ul> <li>Sts: IFC</li> </ul>					
	<u>A-G-FP-0005</u>	D	IFC	~	Ŀ
	CN-632021-001-CN-632021	SD1	IFR	~	Ŀ
	TE-0001-625-PRD-DATA-OU	A	IFR	~	Ŀ
	TE-0001-625-PRD-DATA-OU	A	IFR	~	Ŀ
	TE-0001-625-PRD-DATA-OU	В	IFR	~	Ŀ
	TE-0001-629-SHP-DWG-OU	А	IFR	~	Ŀ
	TE-0001-630-SHP-DWG-OU	В	IFR	<b>~</b>	Ŀ

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.

t s	Sts 🗙 🕇 Di	scipline 🗙				
		Document No. 1	Rev	Sts	Review status	Review history
			-	•		
- Sts	IFC					
	Discipline: AR	СН				
		<u>A-G-FP-0005</u>	D	IFC	~	Ŀ
	: IFR					
-	Discipline: 8M	ILES				
		CN-632021-001-CN-632021	SD1	IFR	~	G
-	Discipline: CIV	-MD				
		TE-0001-625-PRD-DATA-OU	А	IFR	~	Ŀ
		TE-0001-625-PRD-DATA-OU	А	IFR	~	Ŀ
		TE-0001-625-PRD-DATA-OU	В	IFR	~	Ŀ
		TE-0001-629-SHP-DWG-OU	А	IFR	~	Ŀ
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## **5.15 MANAGING REVIEWS WITH COMMENT SHEET**

For projects where parties reviewing documents are unable to form part of the normal InEight Document review teams they are still able to add comments by using an external comment sheet. This sheet can then be imported back into the system by using an enhanced version of XL-Upload.

Contact InEight if you would like this feature enabled on your project.

If enabled, the business process for managing the external reviewer comments is:

- The InEight Document Reviewer (or relevant person) transmits to the external party the set of documents to be commented on and ticks the Attach Comment Spreadsheet to Transmittal option at the bottom of the transmittal screen. (This option is only displayed if the feature is enabled by InEight for your project).
- 2. InEight Document generates the comment spreadsheet and attaches it to the transmittal which is sent as normal from the system.
- 3. The recipient downloads the comment excel file from the transmittal (in addition to the documents themselves) and enters their comments against each document in the cells provided.
- 4. The recipient returns the excel file to the InEight Document reviewer by email.

- 5. The InEight Document reviewer (or relevant person) uses an enhanced version of XL Upload to upload the document review comments spreadsheet from the recipient.
- 6. If the documents the comments are related to are restrained (in a workflow), then the comments are imported into the reviewer's review screen and the reviewer is given the option to complete their review.
- 7. If the documents the comments relate to are unrestrained then they are imported as comments from the recipient who made them.

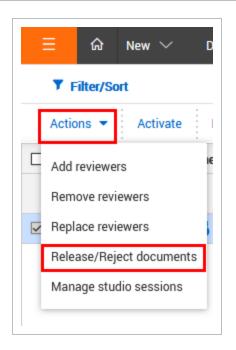
## 5.16 DOCUMENT RELEASE WITHOUT ACTIVATING A WORKFLOW

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).

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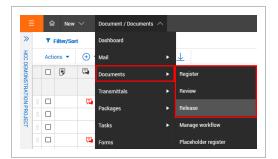
#### 5. Click Save.

NOTE	<ul> <li>The Release / Reject Documents option only appears if this option is enabled at a project level.</li> </ul>
	<ul> <li>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.</li> </ul>
	• If a document is "Released" by the Review Initiator a release notification is sent to all users who have access to the document.
	<ul> <li>If a document is "Rejected" by the Review Initiator, only the originator of the document will receive a notification.</li> </ul>
	<ul> <li>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.</li> </ul>
	<ul> <li>The Notes column on review workflow reports shows an indicator if the document was released/rejected by the Review Initiator</li> </ul>

# **5.17 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.

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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.

	DETAIL	LINKS	COMMENTS	FILE VIEWER	USER ACCESS	EVIEW STATUS	HISTORY			
	DETAIL	LINKO	COMMENTS	FILE VIEWEN	USEN ACCESS	EVIEW STATUS HISTO	IRY HISTORY			
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- 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.

NOTE

- 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.
- 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.