

1.1 INEIGHT DOCUMENT MOBILE

The InEight Document Mobile app provides iPhone, iPad, and Android users with access to InEight Document wherever you are.

Features of this app let you do the following:

- View, download, upload and send attachments and documents (for example, MS Word, Excel, PDF and dwg) in formats supported by your mobile device
- Capture photos using your device and send immediately to other project users
- Open and create new forms
- Send and receive Mail

You can also use any customizations that were applied to the web project.

1.2 GETTING STARTED

Welcome to the InEight Document mobile app. The topics below can help you set up and find your way around the mobile app.

1.3 SIGN IN TO THE DOCUMENT MOBILE APP FOR THE FIRST TIME

You can sign in to the Document mobile app with the same credentials as the web app.

SIGN INTO THE MOBILE APP

After you download the mobile app to your mobile device, you can sign into Document and begin working.

You must have valid Document credentials. The app must be installed on your mobile device.

1. From the home screen, open the InEight Document mobile app. The Sign in page opens.
2. Enter your credentials, and then select a server.

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InEight[®] DOCUMENT
POWERED BY TeamBinder

InEight Document Company Login

User ID

Company ID

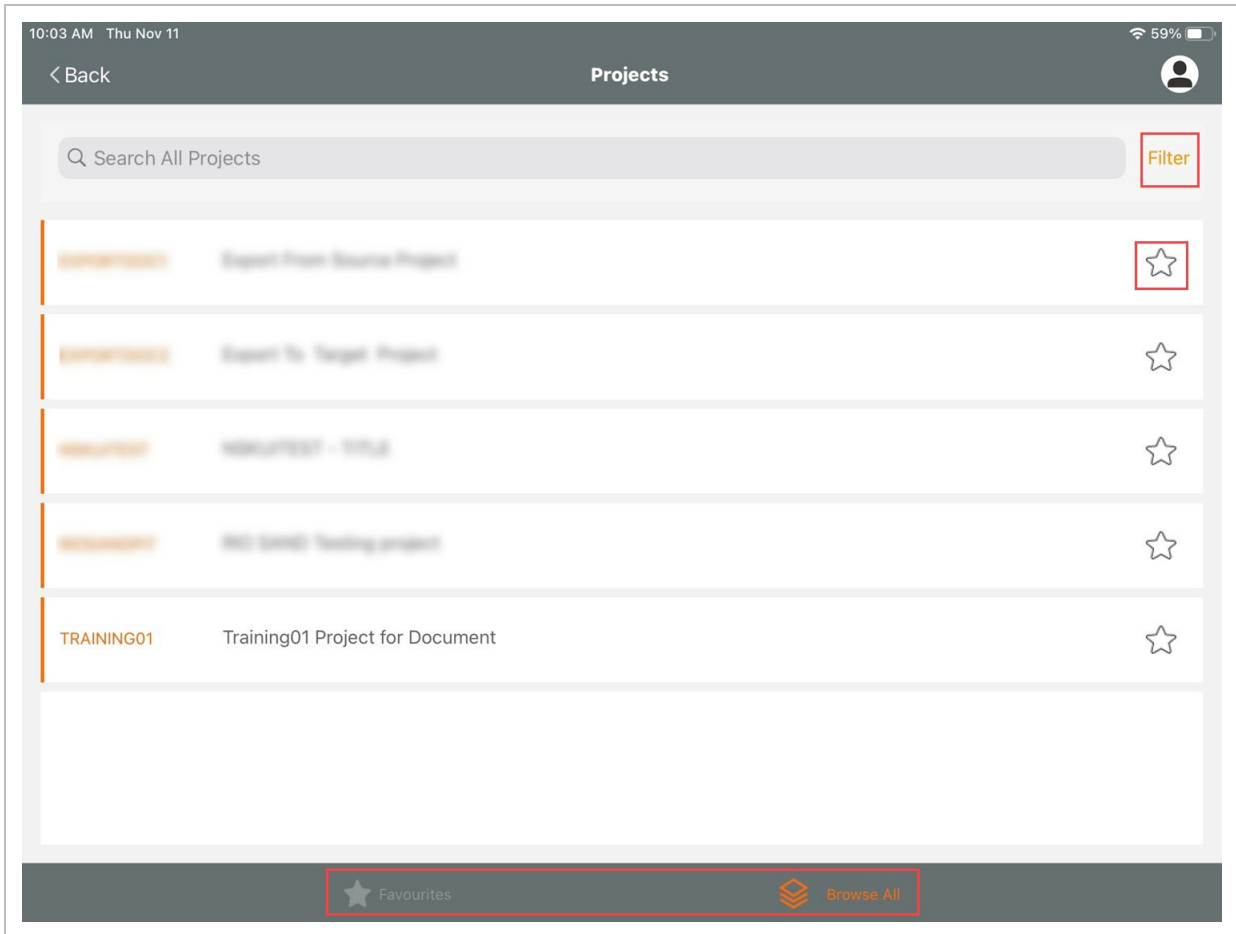
Password

Server Select server

Remember Me ☐

Login

3. Tap **Login**. You are now signed into the application, and the Browse All view of the Projects page is shown. You can tap **Filter** in the upper right corner to filter and sort the available projects.

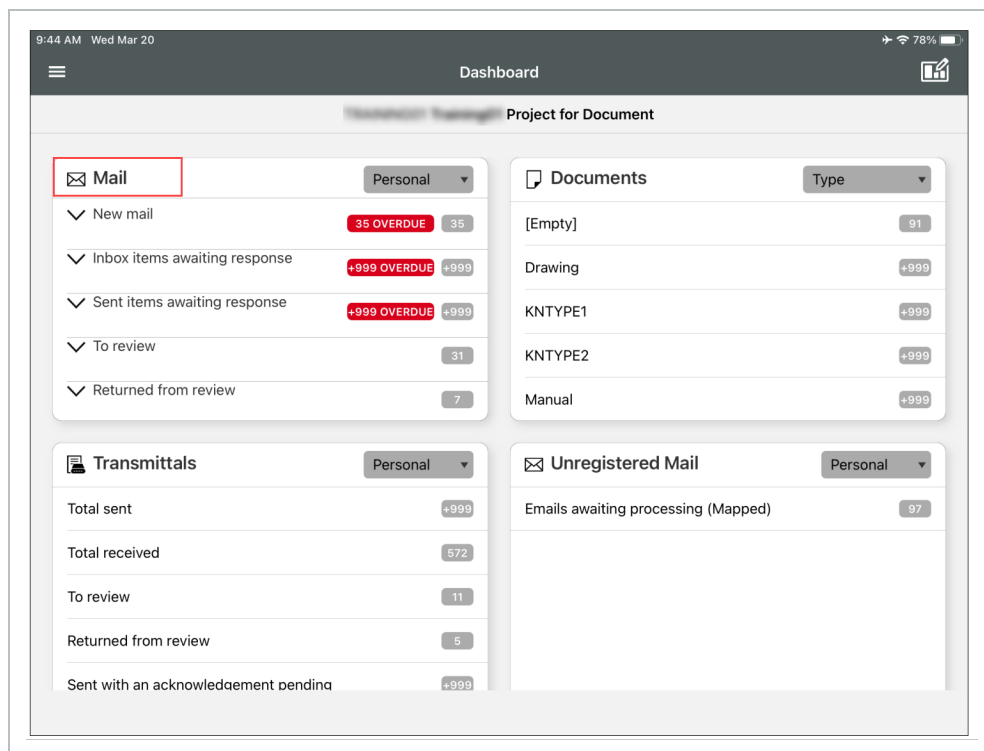


4. Optionally, tap on the star for your favorite projects. If you select favorites, the Favorites view is shown the next time you sign on to the mobile app. If you do not select favorites, the Browse All view is shown the next time you sign in.
5. Tap the Project ID to go to your project. Your project opens in the Documents module.

You can change your home page view to Mail, Gallery, or Forms in your user preferences. The next time you sign in, you are taken to the Favorites view or Browse All view, depending on your choices in step 4.

1.3.1 Mobile app dashboard

After you sign into your project, the default home page view is the mobile app dashboard. The dashboard is made up of tiles that show project information from each module, like the web app. You can tap the widget tile heading to open the corresponding register.



See [Change your home screen view](#) for information about changing your home page view.

1.4 CHANGE YOUR HOME SCREEN VIEW

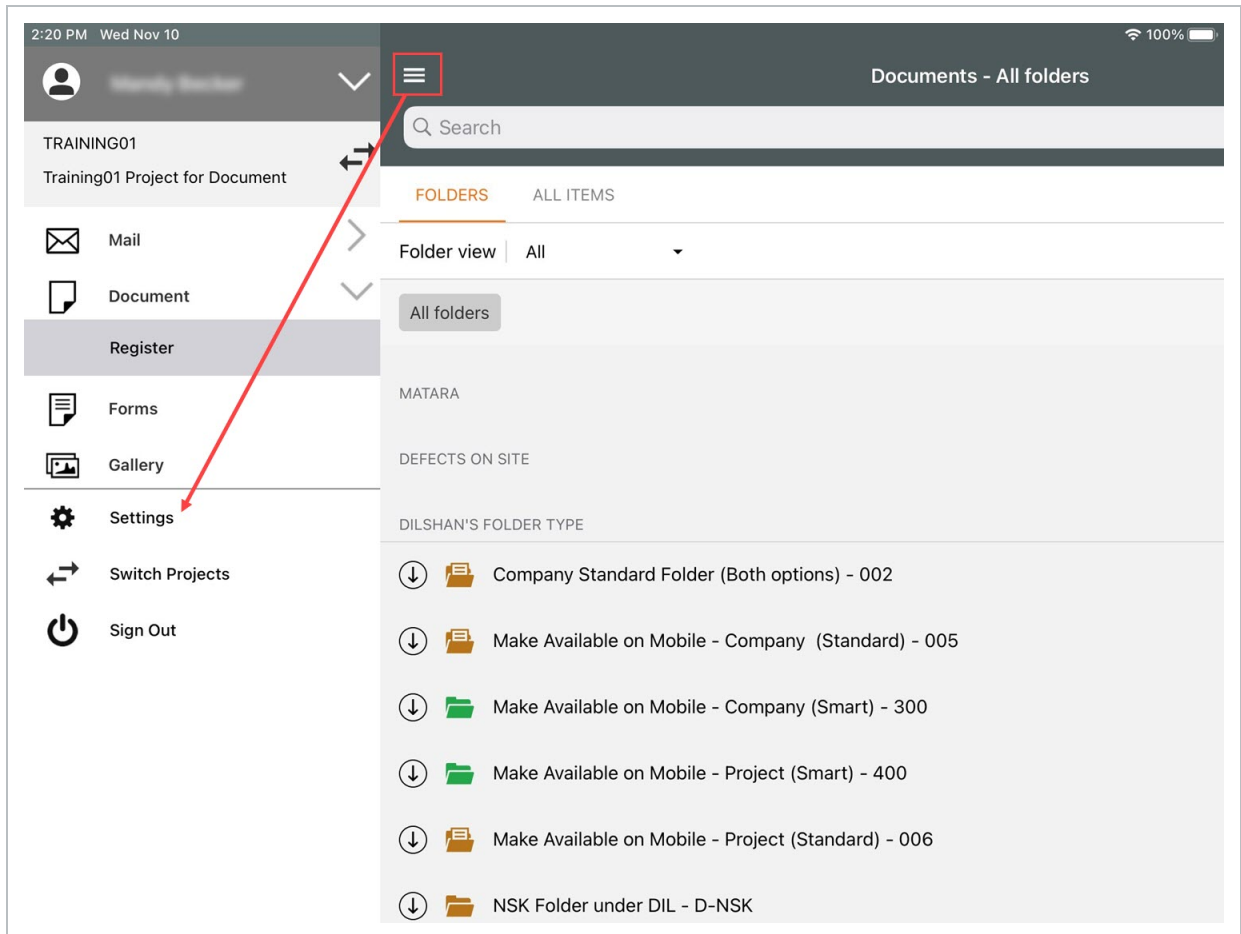
You can change the page that opens after you have signed in and selected a project.

1.4 STEP BY STEP 1 – CHANGE YOUR HOME PAGE

You can change the home page of your mobile app to suit your needs. You can choose to have the app open to the Mail, Document, Gallery, or Forms page.

When first installed, the home page view defaults to the Documents page.

1. Tap the **Main menu** icon in the upper left corner, and then tap **Settings**.



The Options page opens.

2. Tap the **User preferences** tab.
3. Tap the value in the **Set screen as** field, and then select the page you want as your home page.

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Options Save

GENERAL **USER PREFERENCES**

MAX NUMBER OF RECORDS TO BE DOWNLOADED

Set maximum amount 100

Range 20-500

Last downloaded date

HOME SCREEN VIEW

Set screen as

This screen appears after project selection

Document

Mail

Document

Gallery

Forms

4. Tap **Save**.

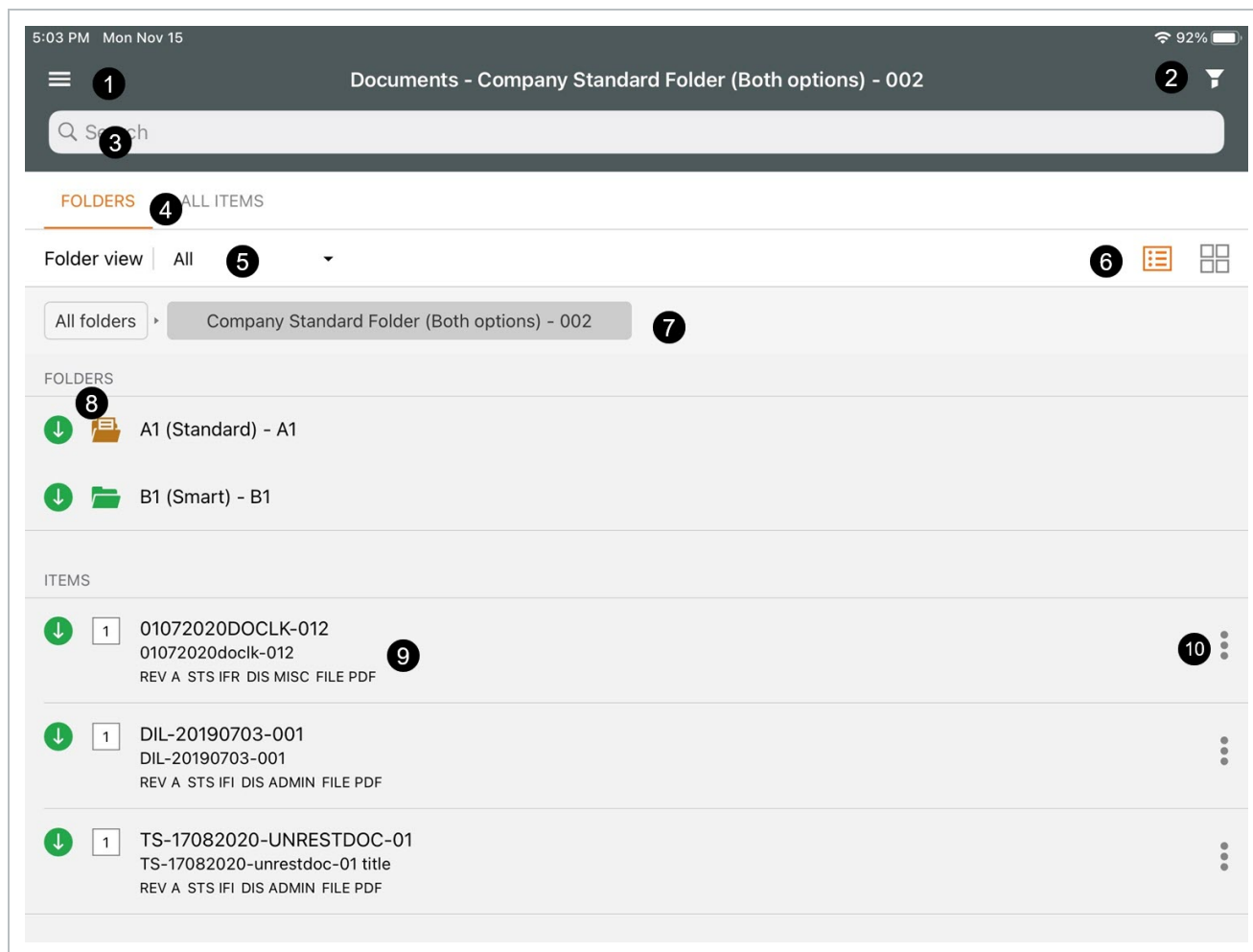
The next time you sign in to the mobile app, the selected page opens as your home page.

1.5 GENERAL NAVIGATION

The modules of the Document mobile app follow similar navigation. When you first open a module, the page opens to the folders view.

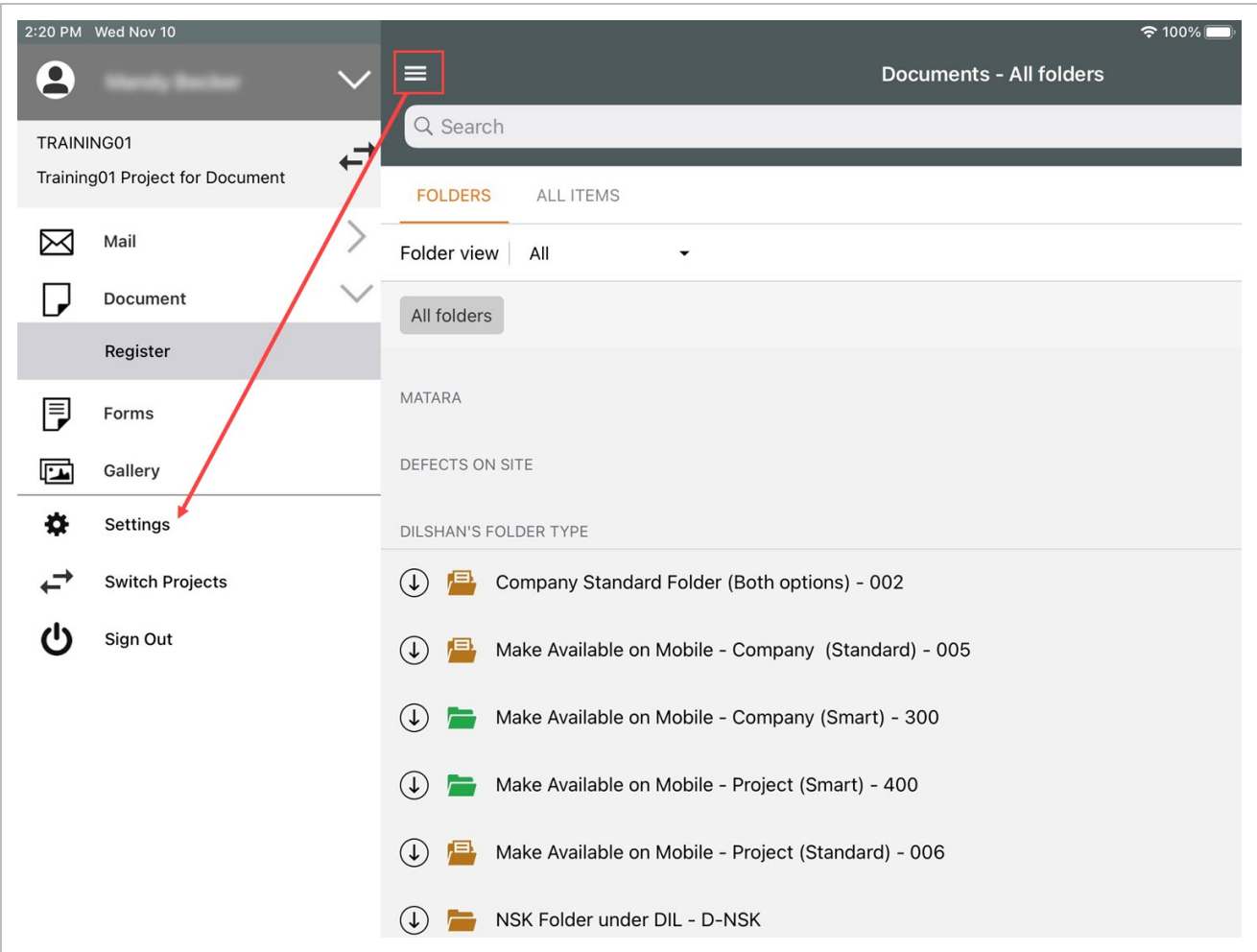
Number	Name	Description
1	Main menu	Tap the icon to switch modules, access settings, switch projects, or sign out of Document.
2	Filter and sort	Use filter and sort options to help you find items in the register.

Number	Name	Description
	options	Tap the Plus icon in the filter list to add fields to the filter criteria.
3	Search	Search for a string in the module items.
4	View	The Folders tab lets you view files by folders. The All items view shows all items without the folder structure.
5	Folder view	Tap the arrow to select the folder to view.
6	List view/thumbnail view	Tap the icons to switch views between a list view and a thumbnail view. The thumbnail view shows a preview of PDF files. This option is available for the Document, Mail, and Gallery modules.
7	Breadcrumb trail	Lets you see the folder levels. You can tap a folder level up to go to that level.
8	Download status	Yellow = Data has been downloaded, but not the files. If you tap the icon, you download the view file. Gray = Nothing is downloaded. You can tap the file to download it. Green = The view file and metadata are downloaded. If you click the icon at the folder level, you download everything in the folder.
9	Item information	Shows the title, number, revision, status, discipline and file type. This information is available in both list view and thumbnail view.
10	Ellipsis menu	Contains the following options: Details lets you view all the metadata Manage Links lets you see items linked to the item and add links to new and existing items. Make available offline lets you download the item and metadata.



1.6 MOBILE SETTINGS

To access mobile settings, tap the **Main menu** icon in the upper left corner of the application, and then select **Settings**. Settings include general settings and user preferences.



1.6.1 General settings

Tap the **General** tab to view the general settings.

Options area	Description
Clear files	Deletes downloaded files and clears all offline data.
Download offline data over mobile data network	Option to turn on ability to download offline data over Mobile Data Network (instead of Wi-Fi). Not active by default.
Upload offline data	Select Upload to upload data created offline into InEight Document (after an internet connection is available).
Maximum file store on device (MB)	Update to set maximum file storage limit on device (MB).

Options area	Description
About InEight Document	Provides version app details, including version and build date. It also includes information about your device.

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Options

GENERAL

USER PREFERENCES

Clear files

Download offline data over mobile data network

Upload offline data

Open view files directly when opening items from document register

MAXIMUM FILE STORE ON DEVICE (MB)

Set maximum amount

Amount used

ABOUT INEIGHT DOCUMENT

Version

Build date

InEight Inc. | Release 25.9

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1.6.2 User preferences

Tap the **User preferences** tab to view user preferences.

Options area	Description
Max number of records to be downloaded	Sets the maximum number of files to be downloaded at one time. Valid amounts are 20-500. The default is 100.
Last downloaded date	The date data was last downloaded to the device.
Home screen view	Lets you select the page that opens after you have signed on and selected a project. You can set your home screen as Mail, Document, Gallery, or Forms.

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Options Save

GENERAL **USER PREFERENCES**

MAX NUMBER OF RECORDS TO BE DOWNLOADED

Set maximum amount 100

Range 20-500

Last downloaded date

HOME SCREEN VIEW

Set screen as Document

This screen appears after project selection

Mail

Document

Gallery

Forms

1.7 INEIGHT DOCUMENT MOBILE DOCUMENTS

The InEight Document Mobile Documents module provides access to the Documents register and lets you view and annotate documents.

1.8 ENABLE DOCUMENT FOLDERS FOR THE MOBILE APP

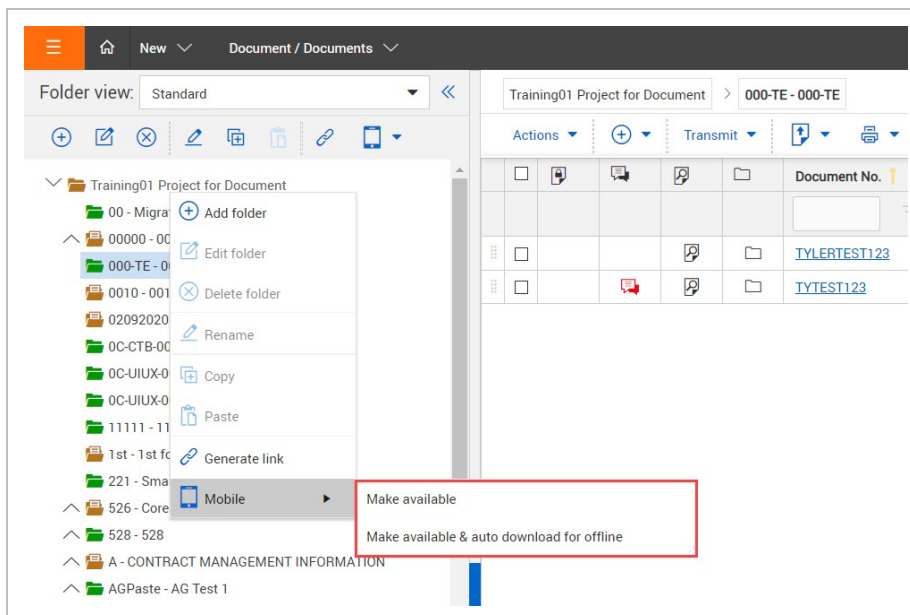
The mobile app displays only document folders that have been made available from the Document browser application.

1.8 STEP BY STEP 1 – ENABLE DOCUMENT FOLDERS FROM THE BROWSER APPLICATION

You can control which folders and associated documents are available on the mobile device. Enabling folders helps ensure that only files relevant to mobile users in the field are shown and simplifies the effort to locate necessary documents.

You must have access to the folder to enable it.

1. From the Documents register in the browser application, right-click a folder.



2. Hover over the Mobile entry, and then choose one of the following:

- Make available
- Make available & auto download for offline

Folders that are available on the mobile app are marked with a Mobile icon.

1.9 INEIGHT DOCUMENT MOBILE DOCUMENTS REGISTER

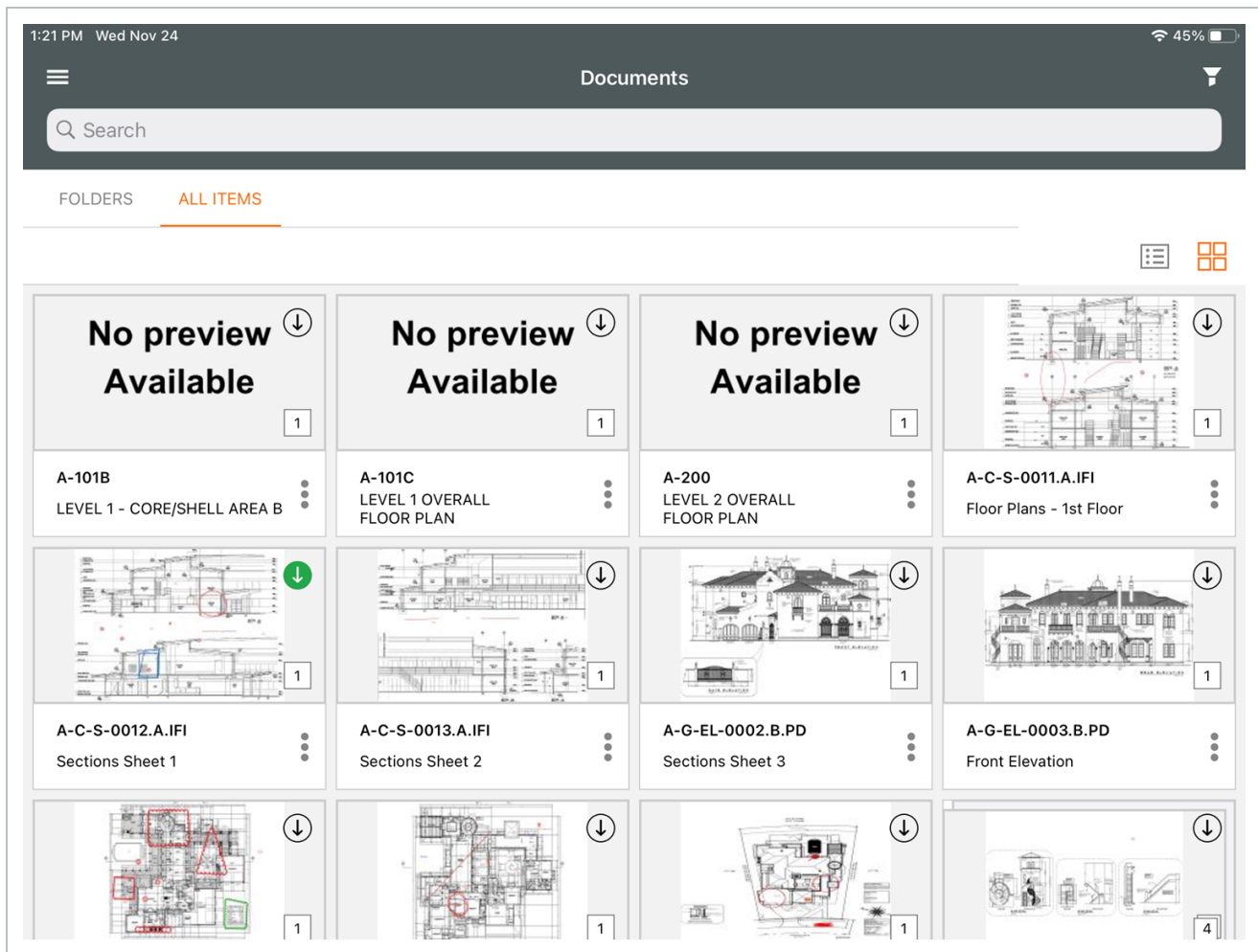
When you go to the Documents module, the Documents register opens in the All folders view.

The All Items view shows all documents. Each entry shows the following information:

- Reference number
- Subject
- Type
- Created date
- Status
- Initiator

You can get additional information by tapping the ellipsis at the right of the entry, and then selecting **Details**.

You can change the view from Folders to All items to match the Documents register in the web browser.



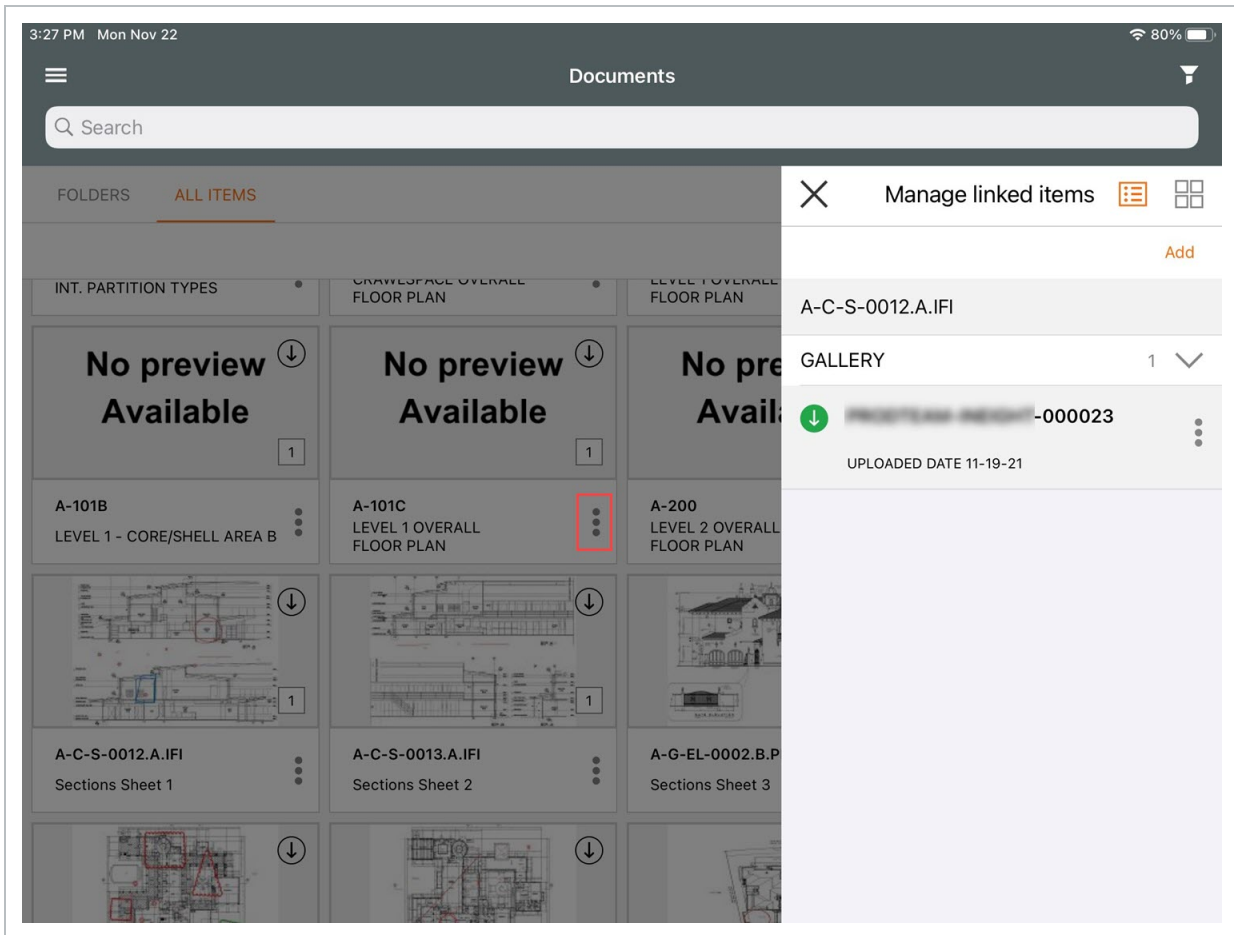
When you are in the All items view in Thumbnail view, you can see previews of PDF drawings. You can pinch and drag to increase or decrease the size of the thumbnails.

1.10 MANAGE DOCUMENT LINKS

You can use the mobile app to view or add links to a document. The Manage linked items slide-out panel is accessible from the Document register or when you add an image or pin to a PDF in the PDF viewer.

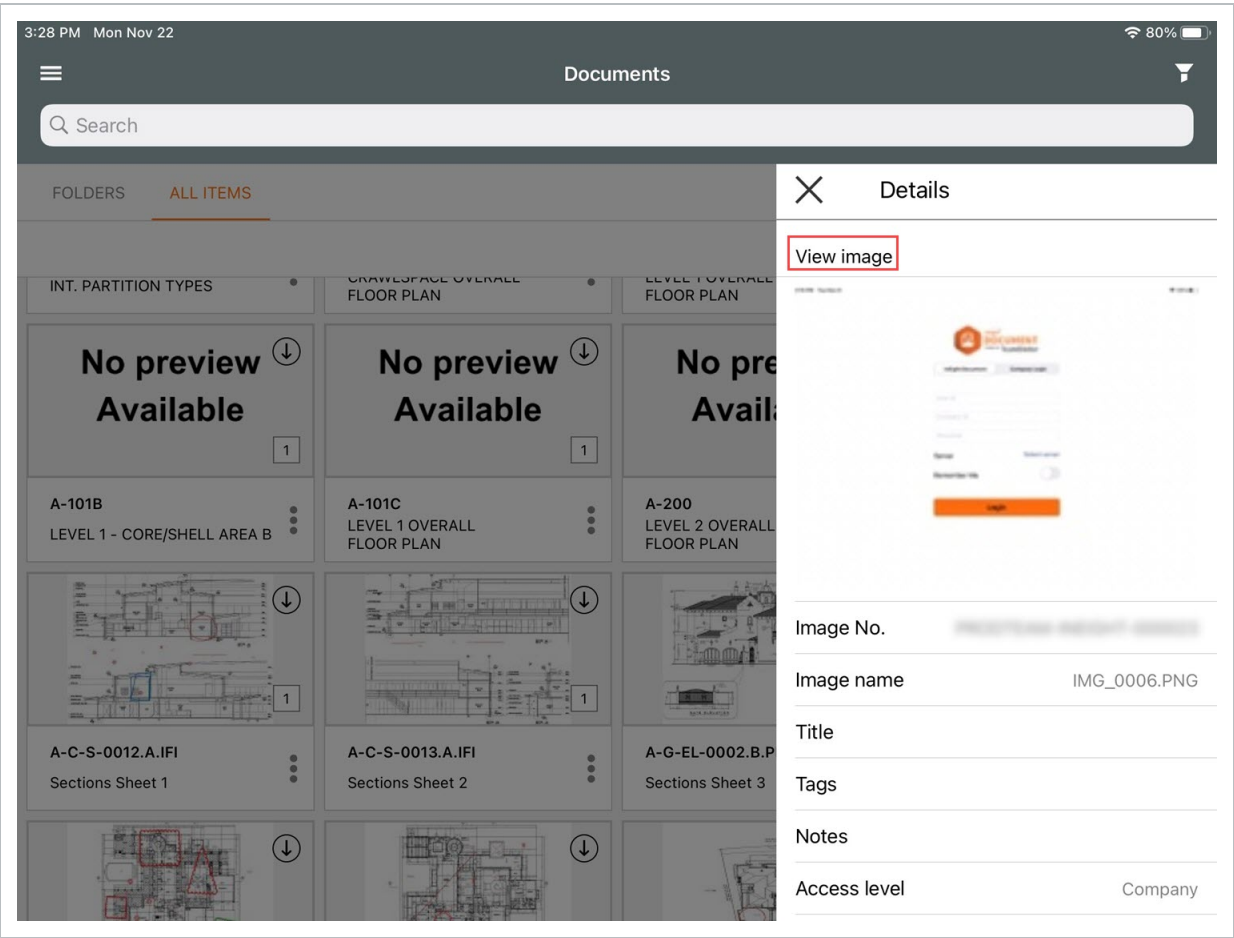
These instructions show how to access the linked items from the Documents register.

1. From the Documents register, tap the ellipsis in a document entry, and then click **Manage Links**. The Manage linked items slide-out panel opens.



The panel shows any linked documents that the document has by folder. You can change the view from list view to thumbnail.

2. Tap the ellipsis next to a link to view metadata details. The Details panel opens.



If the linked item is an image, tap **View image** to see the full image.

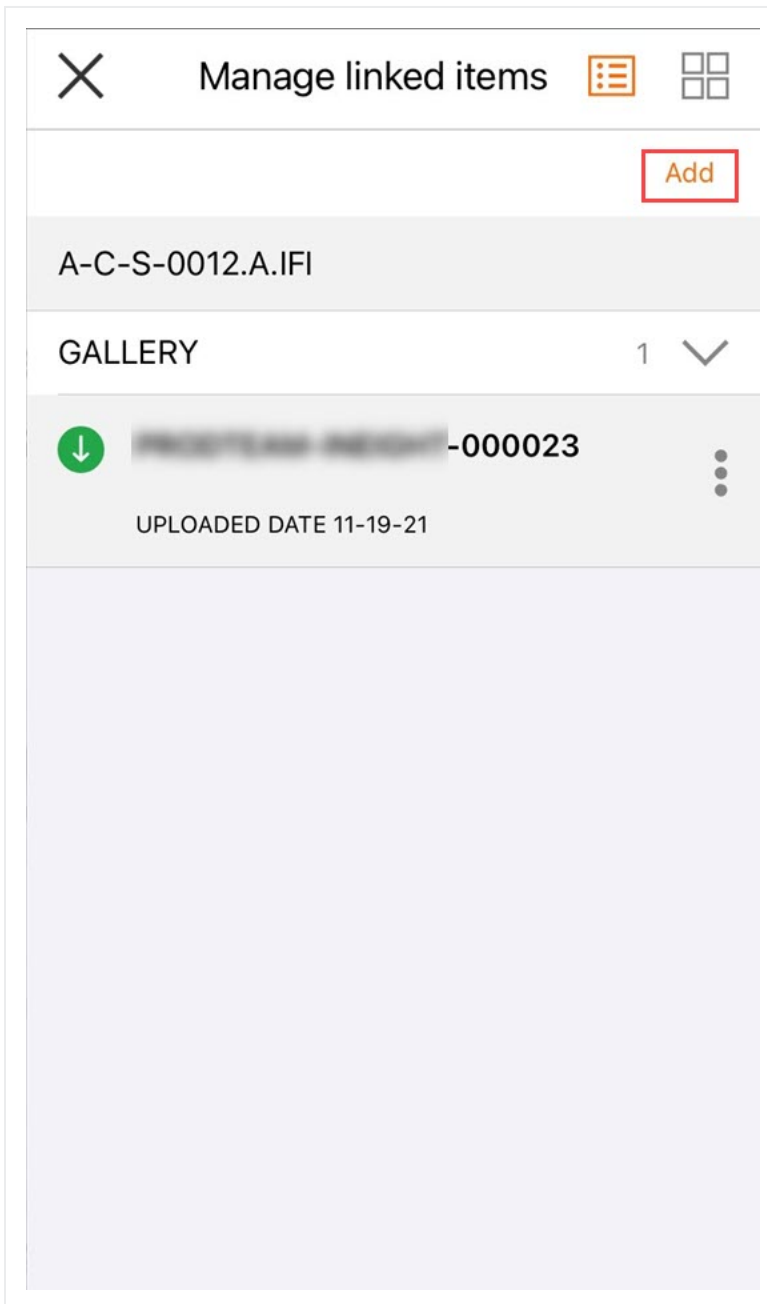
3. Tap the **Close** icon to return to the Manage linked items panel.

You can use the panel to add links to the document.

1.11 ADD A LINK TO AN EXISTING ITEM

You can link an existing item to a document from the Manage linked items panel.

1. From the Manage Linked items panel, tap **Add**.



2. At the Add link prompt, tap **Link existing item**.
3. Select the source of the new item. You can add an item from the document register, gallery, forms register, or mail register.
4. Use the Item search slide-out panel to search for an item.

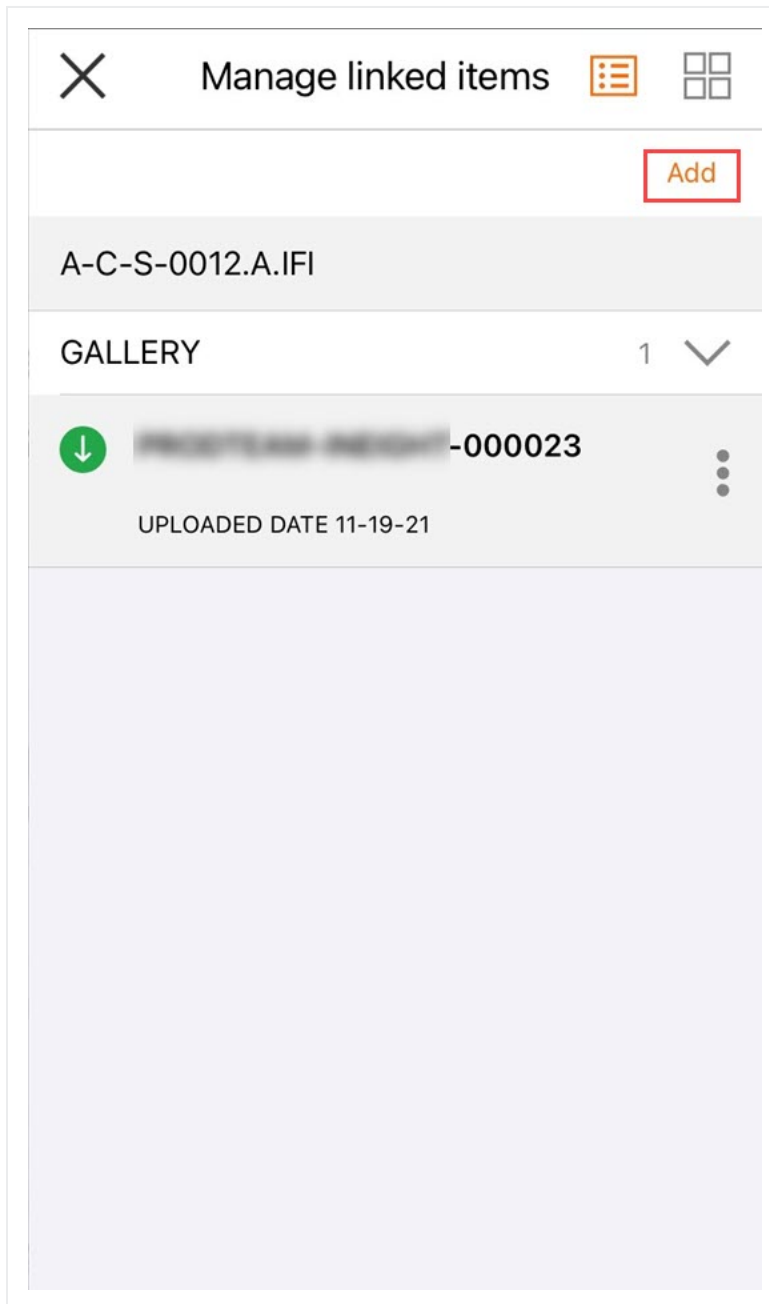
5. Select one or more items, and then tap **Link**. The linked item is added and is shown in the Manage linked items panel.

1.12 ADD A LINK TO A NEW ITEM

You can link a new item to a document from the Manage linked items panel.

These steps start after you have opened the Manage linked items panel from the register or the PDF viewer. If you are adding a new photo, you must allow Document access to your photos.

1. From the Manage Linked items panel, tap **Add**.



2. At the Add link prompt, tap **Link new item**.
3. Select the source of the new item. You can add an item from the gallery or create a new form from existing form types.
4. To add a form, skip this step and continue with step 5. To add an item from the gallery, do one of the following:

- Select **Take a Photo**. The camera opens and you can take a photo. When you have the image you want to use, tap **Use Photo**, and then tap the **Complete** icon.
 - Select **Upload Existing image**. A dialog box showing thumbnails of items in the gallery opens. Select an image, and then tap **Add**. Enter the title, notes, tags, and access level. Tap **Save**.
5. To add a form, select a form type from the list. A new form opens. Fill out the form and tap **Save** to save the form or **Complete action** to save and progress it through the workflow.

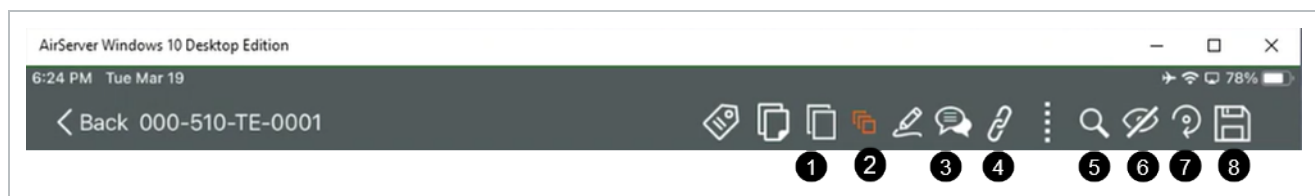
1.13 PDF VIEWER

The PDF viewer lets you view and mark up PDF documents. You can use the viewer to view documents in other formats, but the mark-up capabilities are disabled.

The mobile app supports Foxit version 9.0.

1.13.1 PDF Viewer toolbars

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

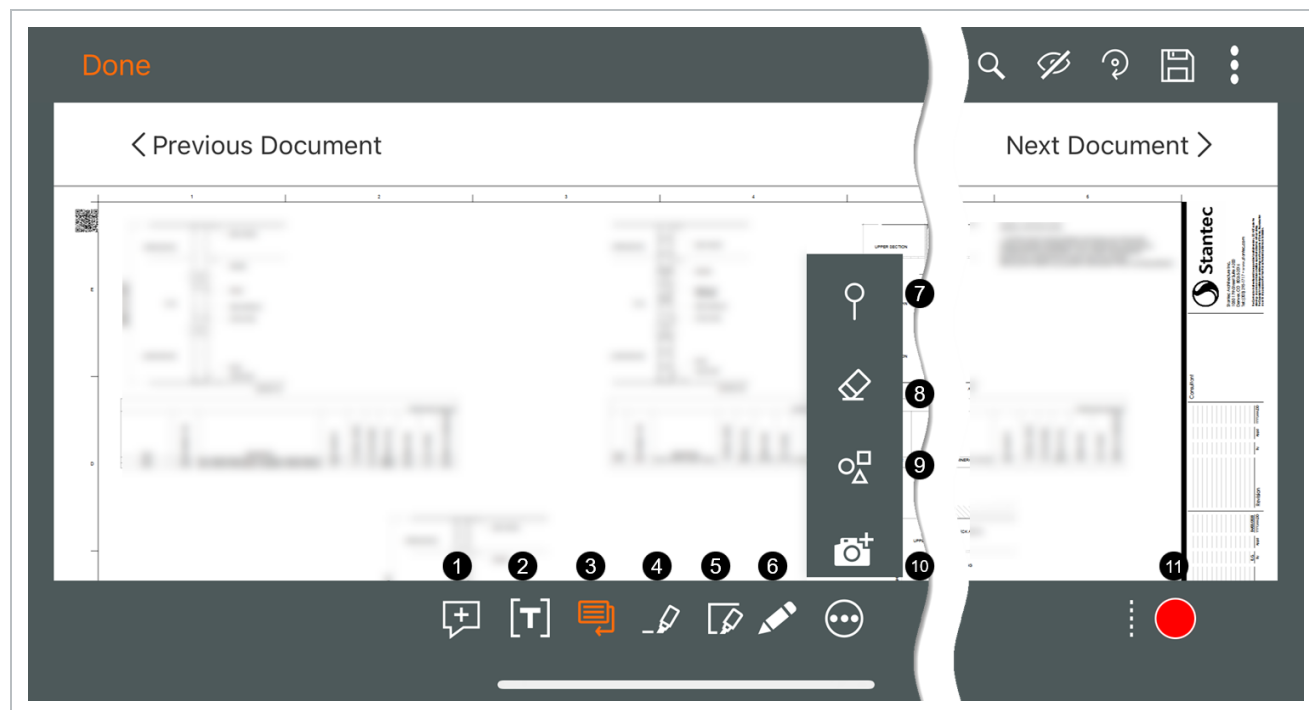


Item number	Name	Use
1	Thumbnail/Pages	View a thumbnail of each page of the document. You can scroll through the thumbnails and tap to go directly to that page.
2	Revisions	View the revisions of a document.
3	Comments	View comments and annotations, such as notes, shapes, pencil lines, and stamps, associated with the document. You can also create new comments or respond to existing comments. The annotations include the user name, company, date

Item number	Name	Use
		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	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.
6	Hide annotations	View the document without the annotations.
7	Rotate	Rotate the image 90 degrees counter-clockwise.
8	Save	Tap to save your work.

1.13.2 Mark up tools

Tools on the Markup tab let you add text and other annotations to the PDF.



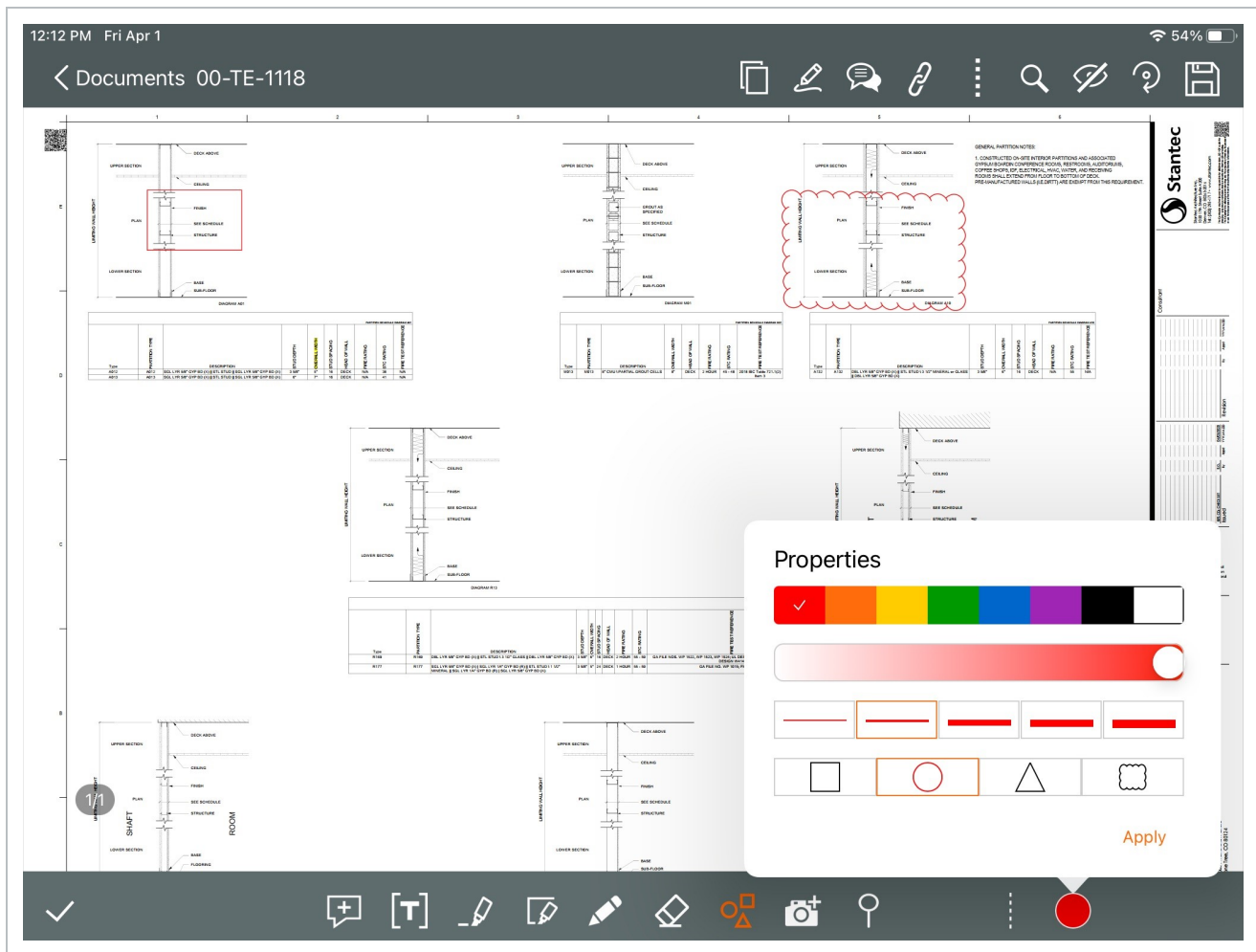
Item number	Name	Use
1	Note	Add a note to the PDF page.
2	Text box	Add a text box on the PDF page.
3	Callout	Add a callout, which includes a text box and an arrow, on the PDF page.
4	Highlight	Highlight text on the PDF page.
5	Area highlight	Draw a highlight box.
6	Pencil	Draw a pencil line.
7	Pin	Place a marker (pin) to an area of the PDF page and link it to a new or existing item.
8	Eraser	Erase a pencil line.
9	Shape	Draw a shape, such as a square, circle, or line.
10	Image	Insert a saved image or take a new image.
11	Tool properties	Select properties for the tool.

You can tap the **Complete** icon after you complete the markup to return to the main tools menu.

1.13.3 Tool properties

The tools properties menu lets you select properties, such as color or intensity, for markup tools. The Tool properties menu is specific to each tool. For example, the tools properties for a text box gives you options for the color and font size of your text; the properties for shapes gives you options for color color transparency, line width, and shape choice.

The image below shows the properties for the shape.



Select the properties you want, and then tap **Apply**. After you add your markup, tap the **Complete** icon. After the markup is applied, you can drag and drop to change the size or position.

1.13.3.1 Shape tool tips

Use these tips to draw rectangles, circles, triangles, or clouds:

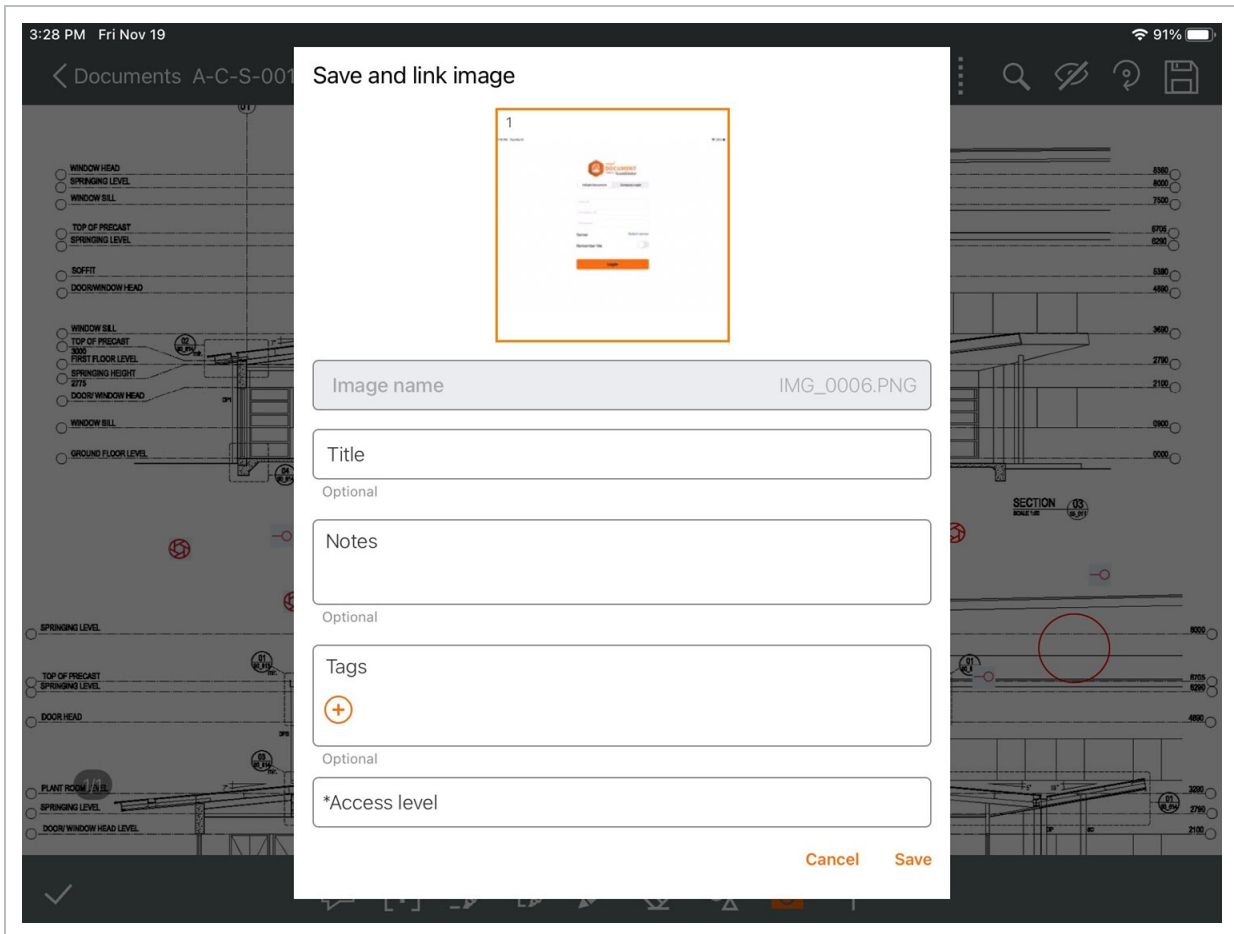
- To draw a rectangle or circle, apply the rectangle or circle property, and then tap a place on the PDF and drag the shape to the desired size .
- To draw a triangle, apply the triangle shape property, and then tap at each place on the PDF where you want the corners of the triangle. The shape does not close automatically, and you can tap more than three corners. To close the shape, tap the **Complete** icon.
- To draw a cloud, apply the cloud shape property, and then tap each corner of the shape. To close the shape, tap the **Complete** icon.

1.14 INSERT AN EXISTING IMAGE INTO A PDF

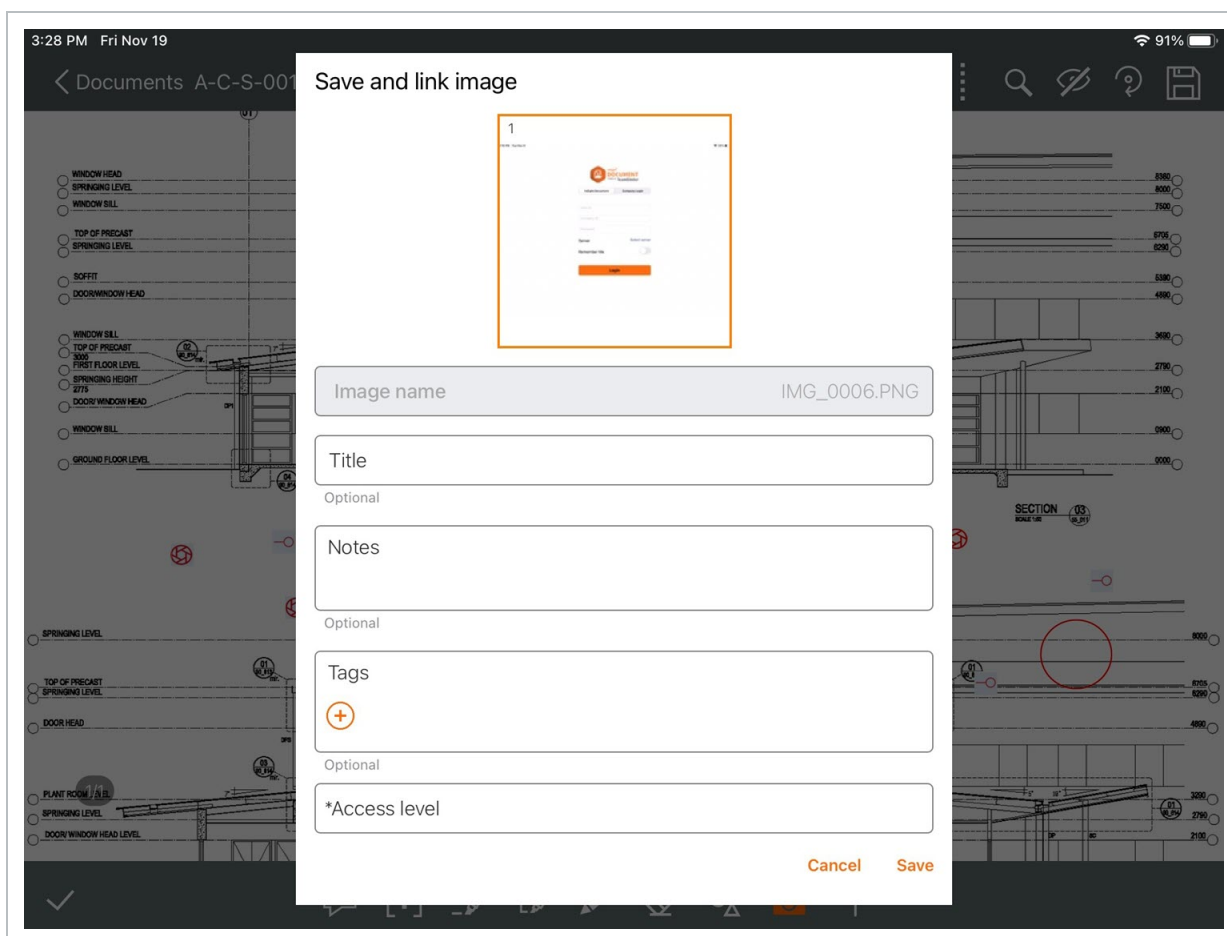
You can insert an image saved on your device into a PDF as an annotation.

You must allow Document access to your photos on your device.

1. From the markup tools menu, tap the **Image** icon.
2. At the prompt, select an area on the page to pin the photo.
3. Select **Upload image** to select an image from your photos.
4. Select an image from your photos, and then tap **Add**. The Save and link image dialog box opens.



5. Enter the title, notes, tags, and access level of the image, and then tap **Save**. The image is uploaded to the gallery, and the Manage linked items slide-out panel opens, indicating that the image has been added. A lens icon is added to the place you selected on the PDF page.



6. Tap the **Complete** icon.

7. Tap the **Save** icon to save the PDF.

You can tap the lens icon to return to the Manage linked items slide-out panel. See [Manage document links](#) for more information about linking items to a PDF.

1.15 INSERT AN NEW IMAGE INTO A PDF

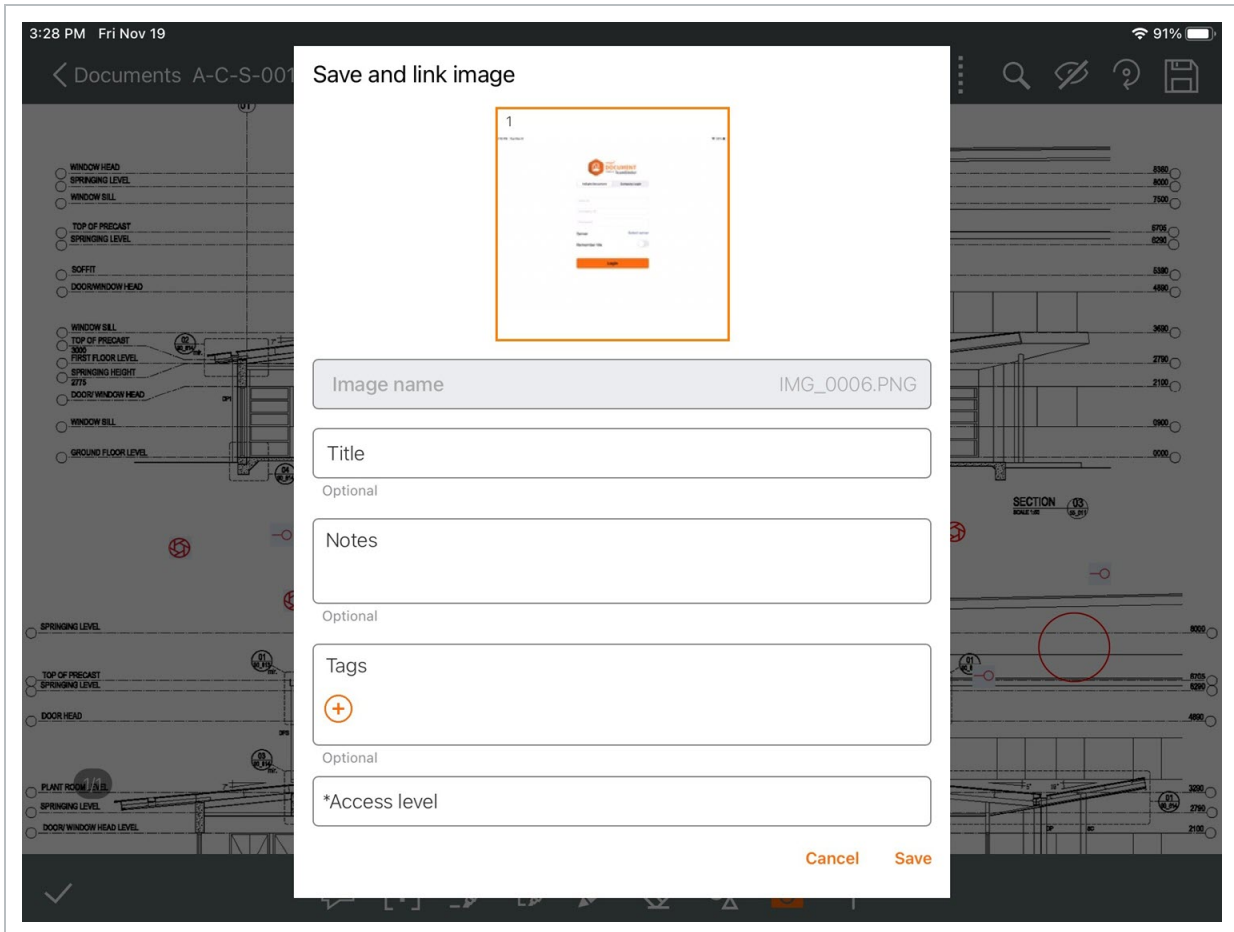
1.15.1 Insert a new image

You can take a photo with your device and insert it into the PDF as an annotation.

You must allow Document to access your camera on your device.

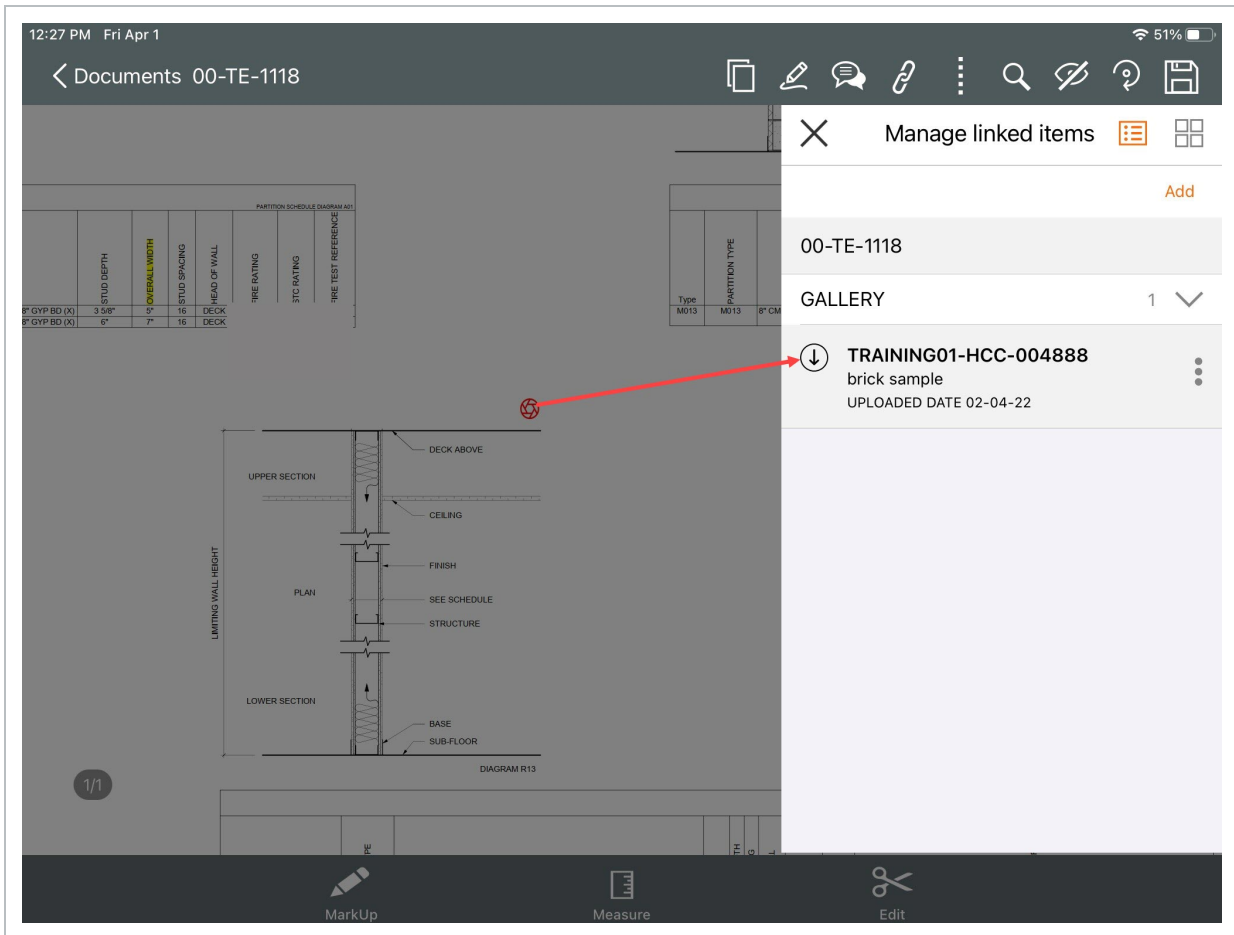
1. From the markup tools menu, tap the **Image** icon.
2. At the prompt, select an area on the page to pin the photo.

3. Select **Take a new image** to open the camera on your device.
4. Take a photo, and then tap **Use Photo** at the bottom left of the image.
5. Optionally use the markup tools to annotate your photo, and then tap the **Complete** icon. The Save and link image dialog box opens.

**NOTE**

Basic markup tools are available for annotation. The tool set is different from the markup tools in the PDF viewer.

6. Enter the title, notes, tags, and access level of the image, and then tap **Save**. The image is uploaded to the gallery, and the Manage linked items slide-out panel opens, indicating that the image has been added. A lens icon is added to the place you selected on the PDF page.



7. Tap the **Complete** icon.

8. Tap the **Save** icon to save the PDF.

You can tap the lens icon to return to the Manage linked items slide-out panel. See [Manage document links](#) for more information about linking items to a PDF.

1.16 ADD A LINK TO AN ANNOTATION

You can add a link to an existing annotation on the PDF. A pin links the document, mail item, form or item in the gallery to an existing annotation.

1. From a PDF that is open in the viewer, tap and hold on an annotation, such as a shape or comment.
2. At the prompt, select either **Link existing item** or **Link new item**.

3. Follow the prompts to search for and select an existing item or create a new item, and then tap **Link**. The Manage Linked items slide-out panel opens and shows your linked item.
4. Tap the **Save** icon.

Tap on the annotation to open the Manage linked items slide-out panel to manage the linked item or add more items.

1.17 COMPARE DOCUMENTS

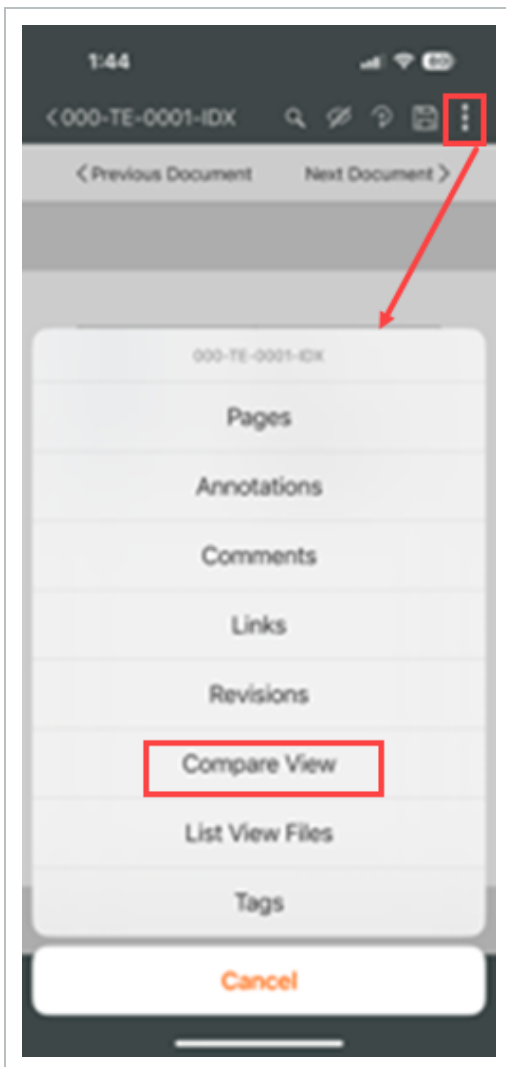
The Compare feature can be used to compare two revisions of documents that you have access to. The two documents are overlaid on each other to enable a side-by-side comparison. You can only compare two revisions.

COMPARE TWO REVISIONS OF THE SAME DOCUMENT

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

Considerations: You can only compare two revisions.

1. From a document that is opened in the viewer, tap the ellipsis menu, and then select **Compare view**.



A list of revisions shows.

2. Select another revision of the document.



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

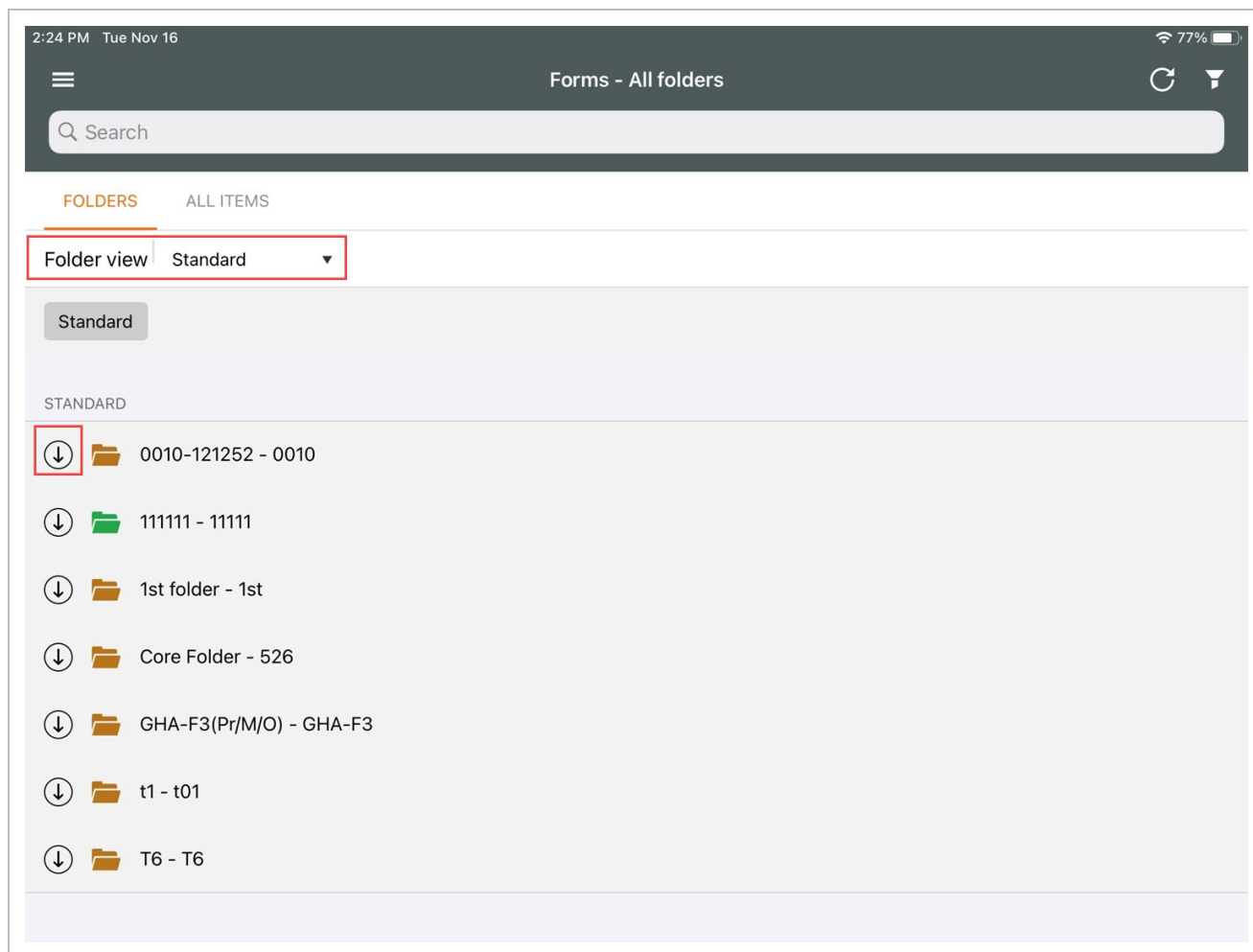
1.18 INEIGHT DOCUMENT MOBILE FORMS

The InEight Document Mobile forms module lets you create new forms and access the Forms register.

1.19 INEIGHT DOCUMENT MOBILE FORMS REGISTER

The forms register opens first when you go to the Forms module. The module has two views: Folders and All Items.

The Folders view shows the folders in the forms register. Tap the arrow next to the Folder view to see the contents of a specific folder.



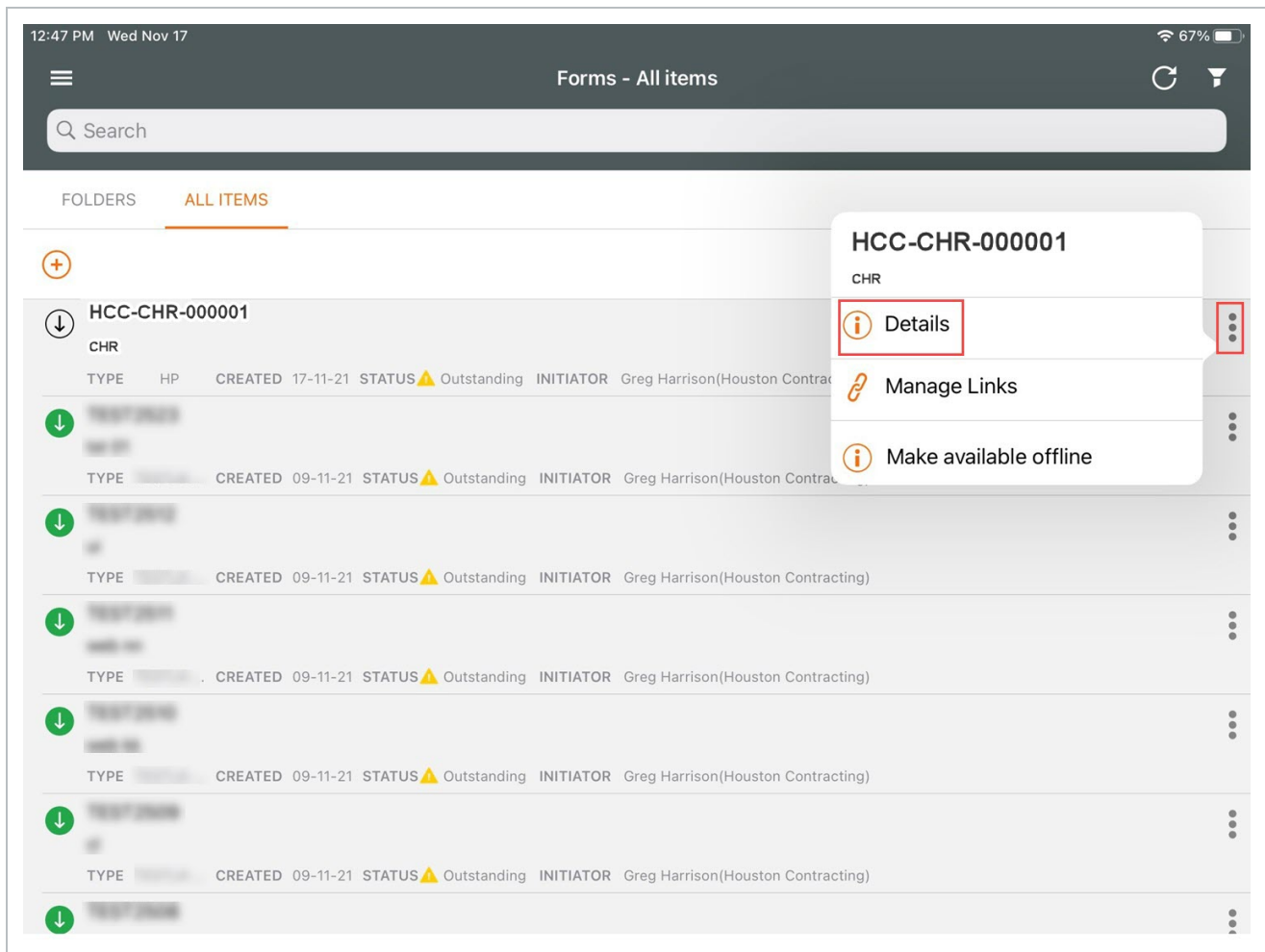
You can click the folder to open it. You can also click the **Download** icon next to the folder to download all items.

The All Items view shows all forms. Each entry shows the following information:

- Reference number
- Subject

- Type
- Created date
- Status
- Initiator

You can get additional information by tapping the ellipsis at the right of the entry, and then selecting Details.

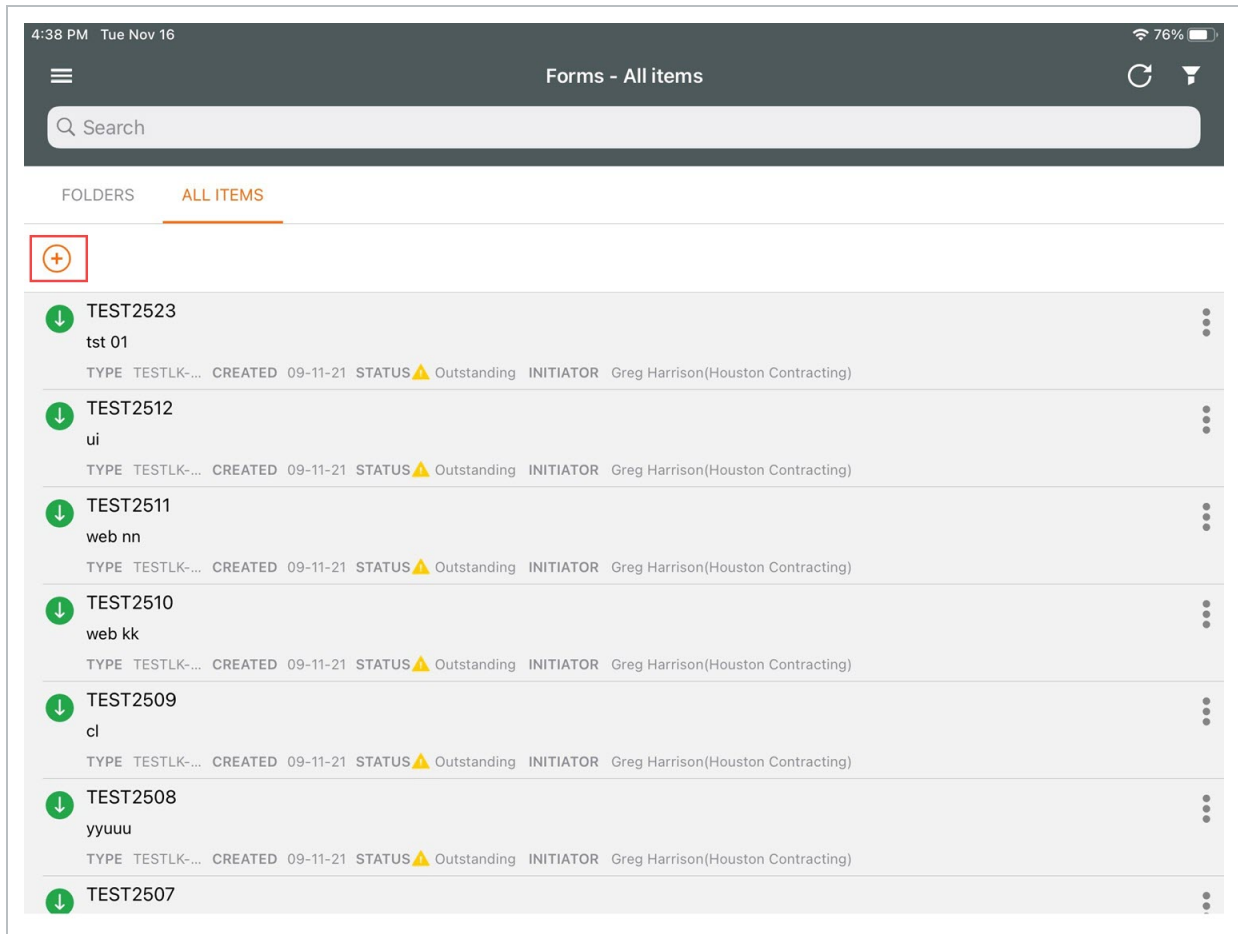


Click on a form to open it.

1.20 CREATE A FORM

You can use the Document Forms module on the mobile application to create a new form. Form types are available on mobile if built using the form builder.

1. From the All Items tab of the forms module, tap the **Add forms** icon.



The Form types list opens.

2. Select a form type from the list. The New Form page opens to the Details tab.

The screenshot shows a mobile application interface for a form titled "No.: New Form". At the top, there is a status bar with the time "3:29 PM", date "Wed Nov 17", and battery level "62%". Below the status bar is a navigation bar with a "Back" button and the form title. The form has two tabs: "DETAILS" (selected) and "HISTORY". Below the tabs is a "View: All" filter and expand/collapse icons. The form contains several sections: "For action" with a red-bordered "+" icon; "For information" with a red-bordered "+" icon and the word "Select"; "*Status" with the value "Outstanding" and a "* Required" label; "*SUBJECT" with a large text input field and a "* Required" label; and a "Text Input" section with buttons for "Replace Text", "Insert at Top", and "Insert Text", followed by a "Select Text to Insert" input field. At the bottom, there is a dark bar with "Cancel", "Save", and "Complete action" buttons. The "Save" and "Complete action" buttons are highlighted with red borders.

3. Tap the **Add** icon in the For action section of the form, and then select the names or distribution list of the reviewers from the Reviewer selection list.
4. Tap the **Add** icon in the For information section, and then select the names or distribution list of the for information users, if necessary.
5. Enter information in the required fields and any optional fields that you want.
6. Optionally add an attachment. See [Add attachments to a form](#) for more information about attachments.
7. Tap **Save** to save the form or **Complete action** to complete the form.

After you complete the action, the comments tab is shown. See [Add comments to a form](#) for more information about comments.

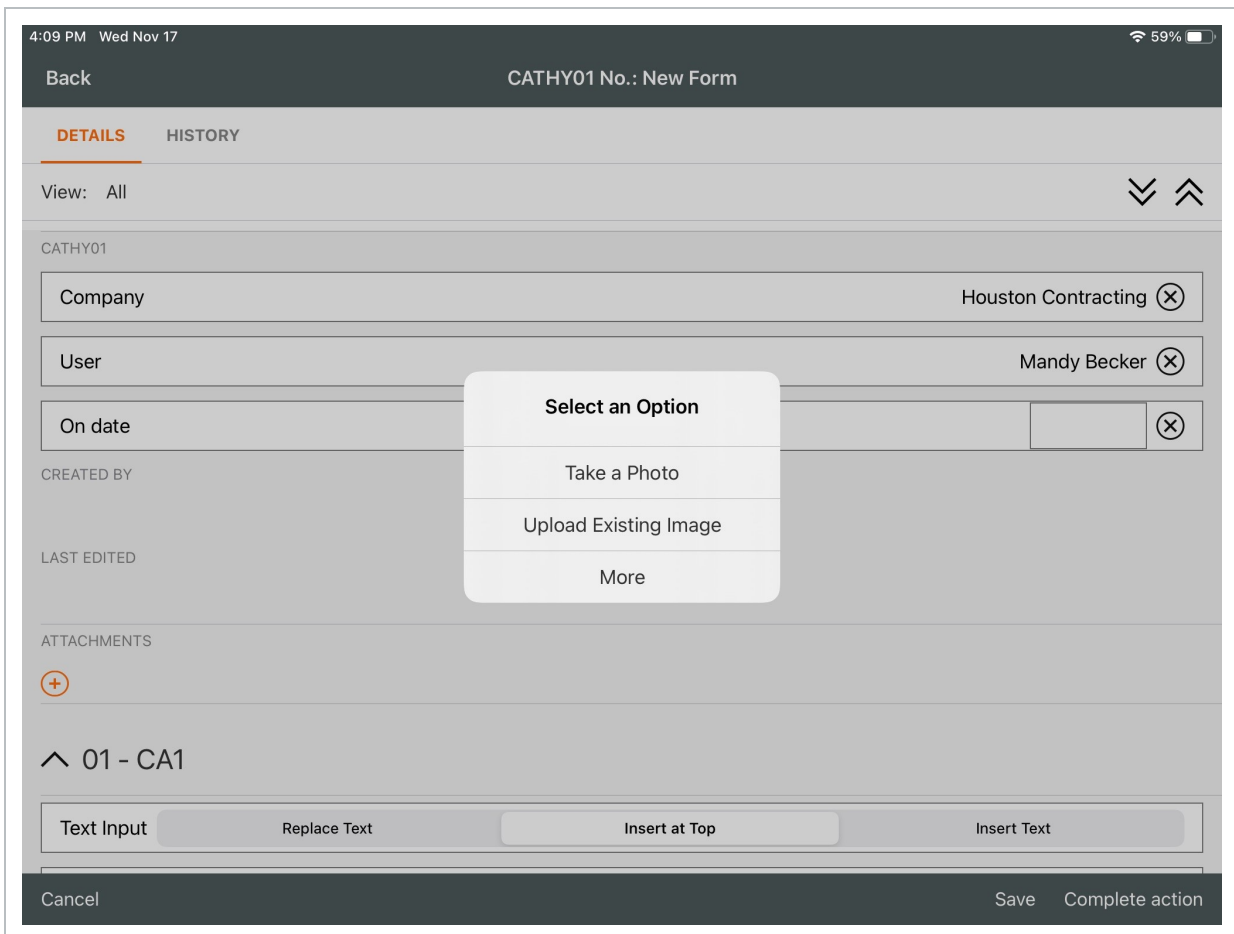
1.21 ADD ATTACHMENTS TO A FORM

You can add attachments to a form from the mobile app.

The mobile app lets you add attachments to a form without having to go back to the web browser application. You can take a photo, upload an existing image, or access files in your OneDrive, iCloud, or other storage location.

You must allow Document access to your photos or camera to attach images. When you tap Take a Photo or Upload Existing Image for the first time, you are prompted to allow Document to access your photos or camera. After you allow access, you are not prompted again.

1. From a form, scroll to the Attachments section, and then tap the **Add** icon. The Select an Option dialog box opens.



2. Select one of the following:
 - If you want to add an image, select **Take a Photo** or **Upload Existing Image**, and then follow the instructions on your device. You can skip to step 4.
 - If you want to add a file from storage, select **More**, and then continue with step 3.

3. A dialog box opens with recent files. You can select one of these or tap **Browse** to see more options. The Browse menu lets you access recent files, files in locations such as iCloud Drive or One Drive, and recently deleted files. After you find your file, tap it to add it as an attachment.
4. Verify that the file is added to the form.

The screenshot shows a mobile application interface for a form titled "No.: New Form". At the top, there is a status bar with the time "6:45 PM", date "Wed Nov 17", and battery level "51%". Below the status bar is a dark header with a "Back" button and the form title. The main content area has two tabs: "DETAILS" (selected) and "HISTORY". Under the "DETAILS" tab, there is a "View: All" option and a collapse/expand icon. The form fields are as follows:

- Company:** A text field containing "Houston Contracting" with a close button (X).
- User:** A text field containing "Mandy Becker" with a close button (X).
- On date:** A date picker field with a close button (X).
- CREATED BY:** A section header with a light gray background.
- LAST EDITED:** A section header with a light gray background.
- ATTACHMENTS:** A section header with a light gray background. Below it is a red circular plus icon (+) for adding attachments.
- File name:** A text field containing "JDoe12345.numbers" with a toggle icon (eye) and a close button (X). This field is highlighted with a red rectangle.

At the bottom of the form, there is a dark footer bar with three buttons: "Cancel", "Save", and "Complete action".

5. Tap **Save** to save the form or **Complete action** to complete the form.

1.22 ADD COMMENTS TO A FORM

After you save or complete a form, the Comments tab is shown, and you can add comments.

1. Tap the Comments tab of the form, and then tap the **Add** icon. The Add a comment dialog box opens.
2. Enter your comments in the Comment field, and then indicate who can see the comments and who to send the comments to.

3. Optionally add attachments by tapping the **Add attachment** icon in the upper right corner. The attachment is added in the Attachments section.
4. Tap **Add Comment**. The comment is added to the Comments tab and the History tab.

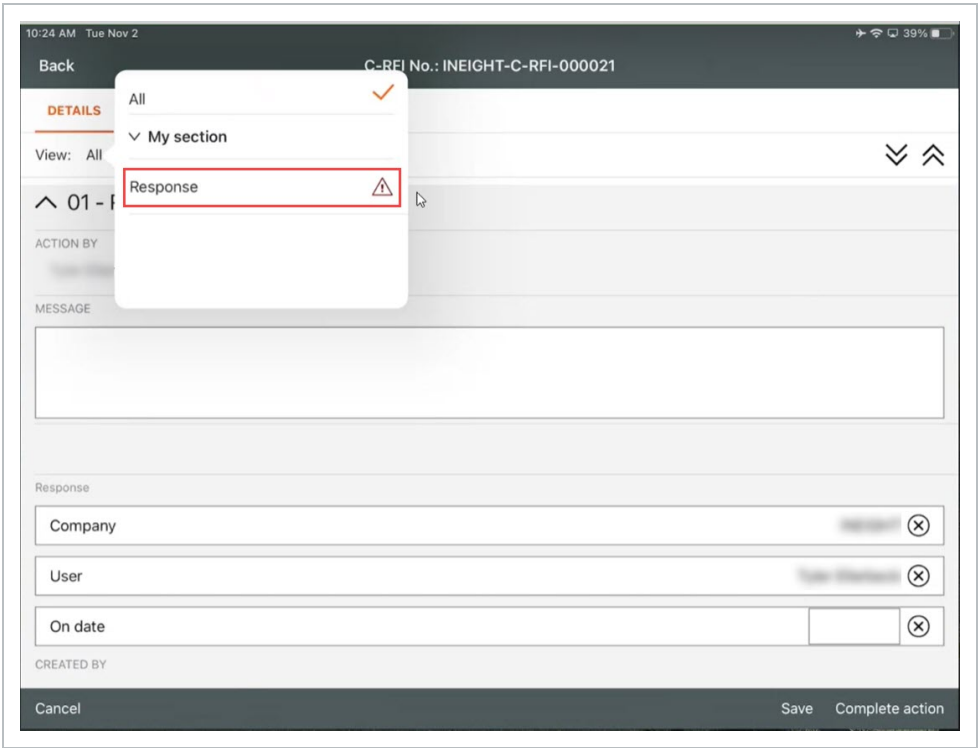
You can add a response to the comment by tapping the Comment icon in the lower right of the comment. You can also close out the comment by tapping the **Close out** check box.

1.23 RESPOND TO A FORM IN A WORKFLOW

You can use the mobile app to respond to a form in a workflow. After a form progresses in the workflow, the current form section in the workflow is enabled.

The screenshot shows a mobile app interface for responding to a form. At the top, there is a status bar with the time 10:23 AM, date Tue Nov 2, and battery level 40%. Below the status bar is a header bar with a 'Back' button and a 'C-RFI No.: INEIGHT-C-RFI-000021' label. The main content area has three tabs: 'DETAILS' (selected), 'COMMENTS', and 'HISTORY'. Below the tabs is a 'View: All' button. The main content area is titled '01 - Response' and contains a form with the following sections: 'ACTION BY' (with a blurred name), 'MESSAGE' (with a large text input area), 'Response' (with a 'Company' field), 'User' (with a 'User' field), and 'On date' (with a date picker). At the bottom of the form is a 'CREATED BY' field. The bottom of the screen has a dark bar with 'Cancel', 'Save', and 'Complete action' buttons.

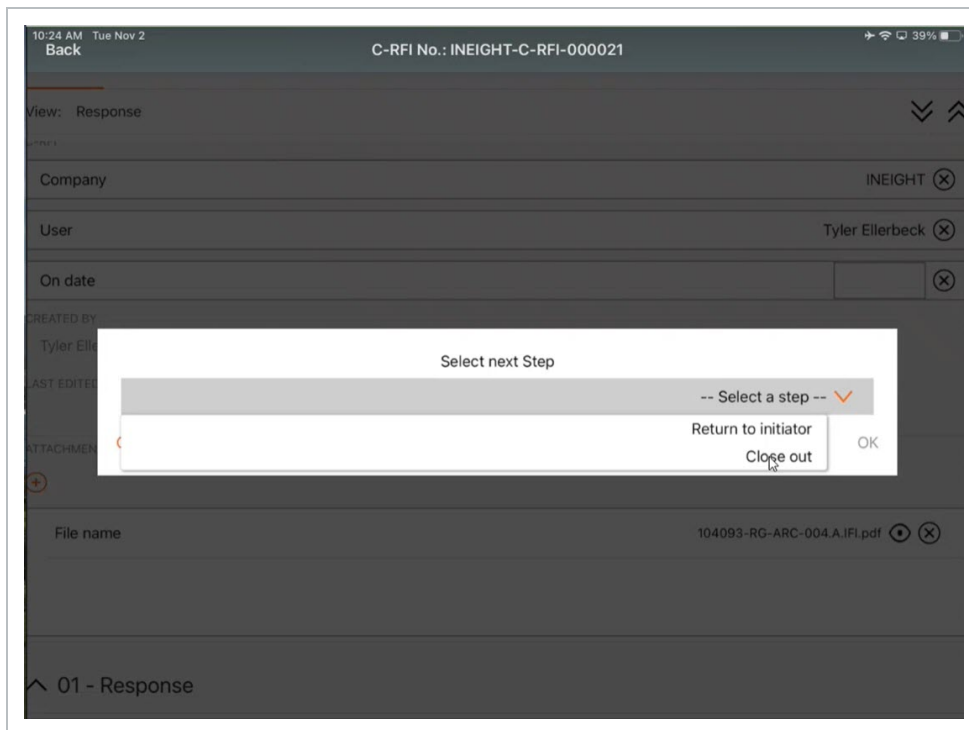
To show only your section of the form tap **View: All**, and then select **My section**. A list of all sections that are assigned to you are shown. Tap the section to go directly to it.



NOTE

When you save the form and other users are working simultaneously in the same form, Document shows a message warning that other users have made changes. When a form is left open and other users have made changes prior to anyone saving it, a list of changes is shown. You can then choose to overwrite the changes with your own or accept the updates other users have made to the form.

After you fill out your part of the form, tap **Complete action**. If there are multiple steps to the workflow, you are prompted to select the next step.

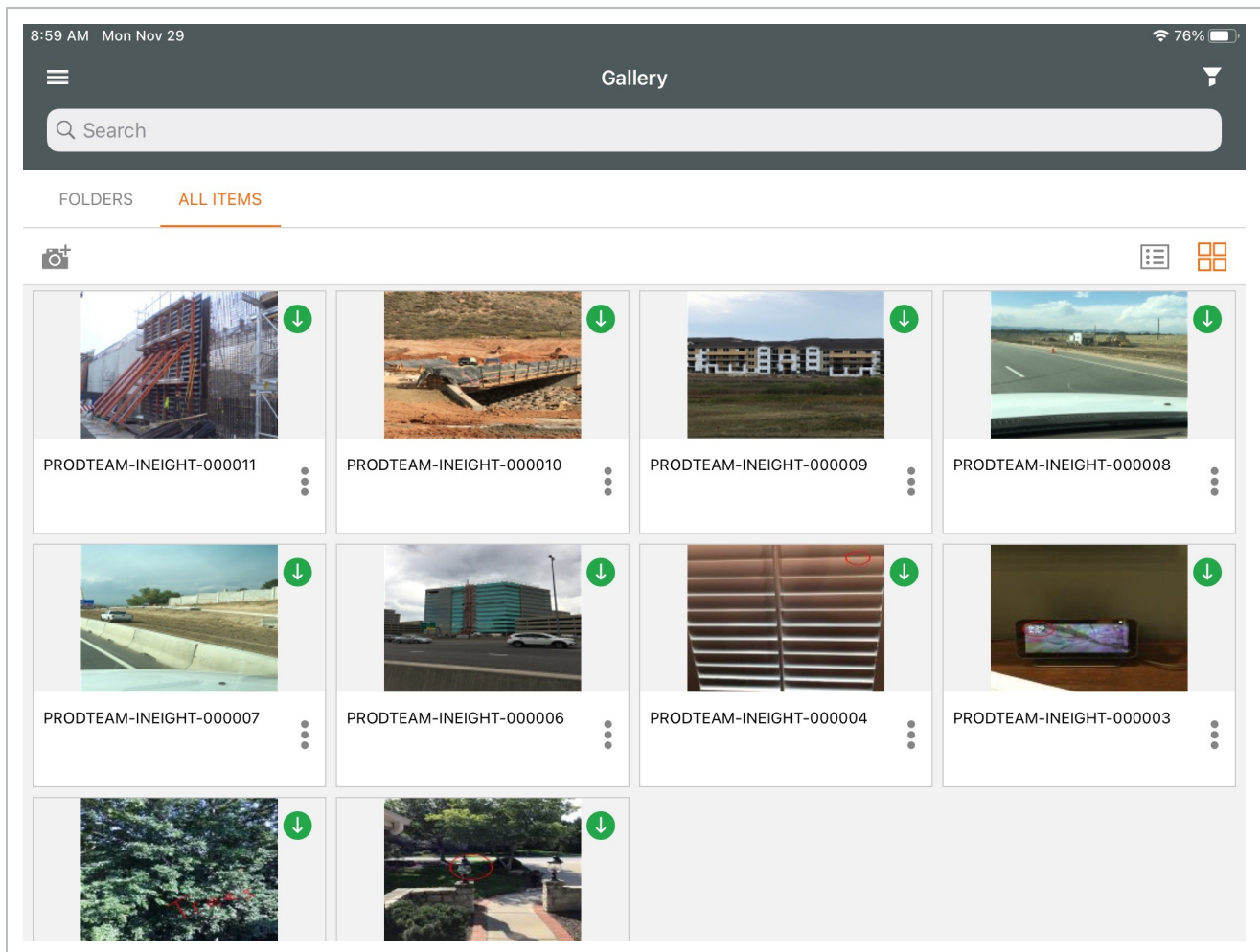


1.24 INEIGHT DOCUMENT MOBILE GALLERY

The InEight Document Mobile Gallery module gives you access to the features of the gallery from your device.

1.25 INEIGHT DOCUMENT MOBILE GALLERY REGISTER

When you go to the Documents module, the Documents register opens in the All folders view. You can change the view from Folders to All items to see all items in the gallery.



When you are in the All items view in Thumbnail view, you can see previews of images. You can pinch and drag to increase or decrease the size of the thumbnails.

1.25.1 View an item in the gallery

Tap any image in the gallery to view the details. The Details slide-out panel shows the metadata for the image. Tap **View image** to see a full-size image.

× Details

View image



Image No.	PRODTEAM-INEIGHT-000024
Image name	0FDBB406-47CB-4034-AAB7-99653F2159C9.jpg
Title	Brick sample
Tags	
Notes	Historic district brick standard color

1.26 ADD A NEW IMAGE TO THE GALLERY

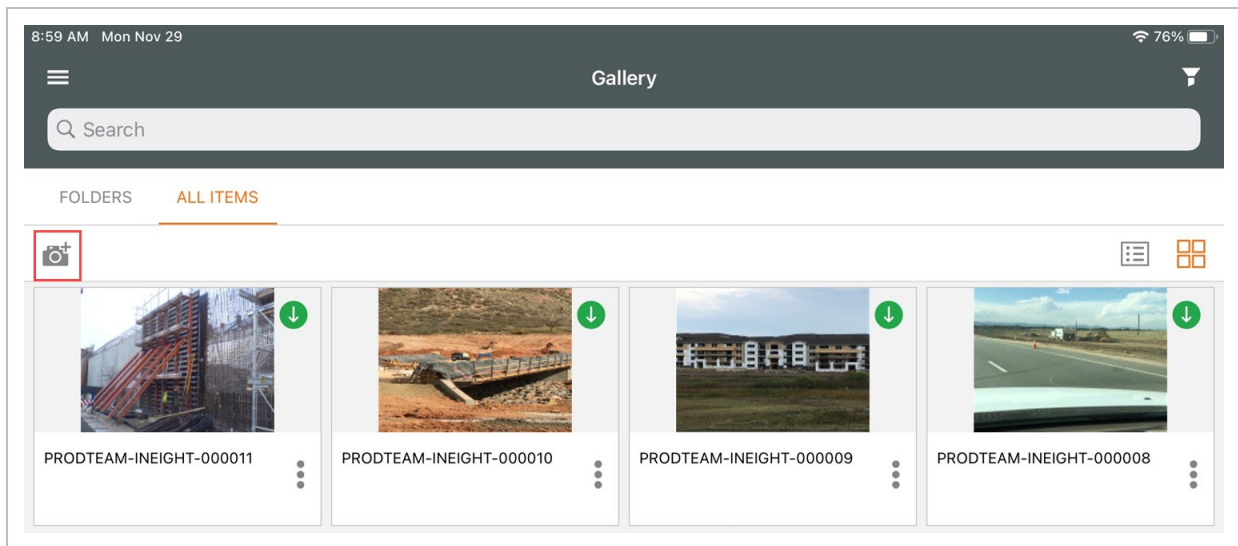
You can take a new image and add it to the gallery.

ADD A NEW IMAGE TO THE LIBRARY

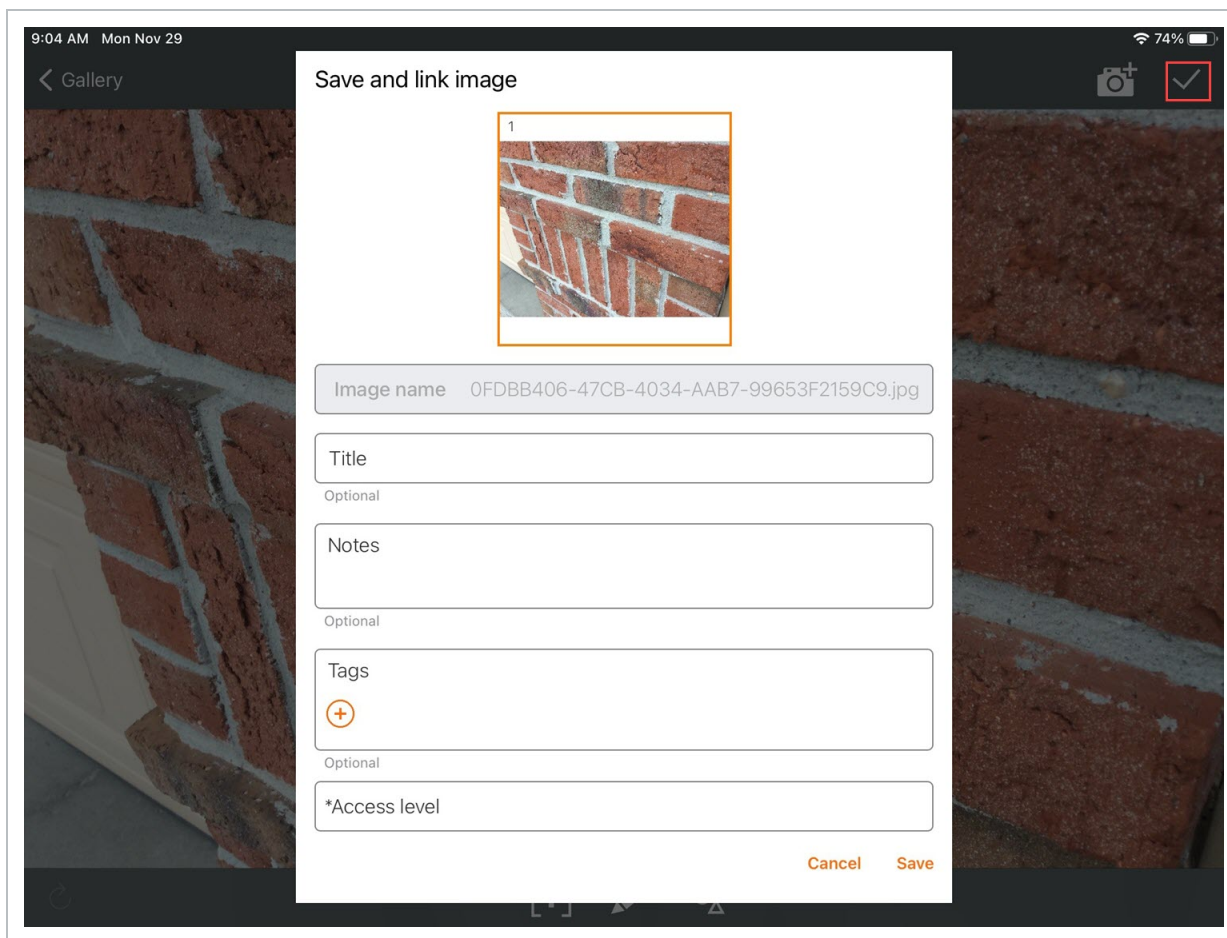
Summary: Add an image from the camera on your mobile device to the gallery. After it is added, the image is available in both the mobile and web applications.

Considerations: You must allow Document to access the camera on your device. If you have an iOS device, it is best practice to enable location services (Settings > Privacy & Security > **Location Services**) to ensure you are capturing the expected location data.

1. From the All items view of the Gallery, tap the **Add image** icon.



2. At the prompt, select **Take a new image**. The camera on your device opens.
3. Take a photo with your camera. You have the option to use the photo or retake the photo. When you have the photo you want, tap **Use Photo**.
4. Optionally use the markup tools to add simple markups.
5. Tap the **Complete** icon. The Save and link image dialog box opens.



6. Add detail information. The Access level field is required; the others are optional.

7. Tap **Save**. The image is added to the gallery.

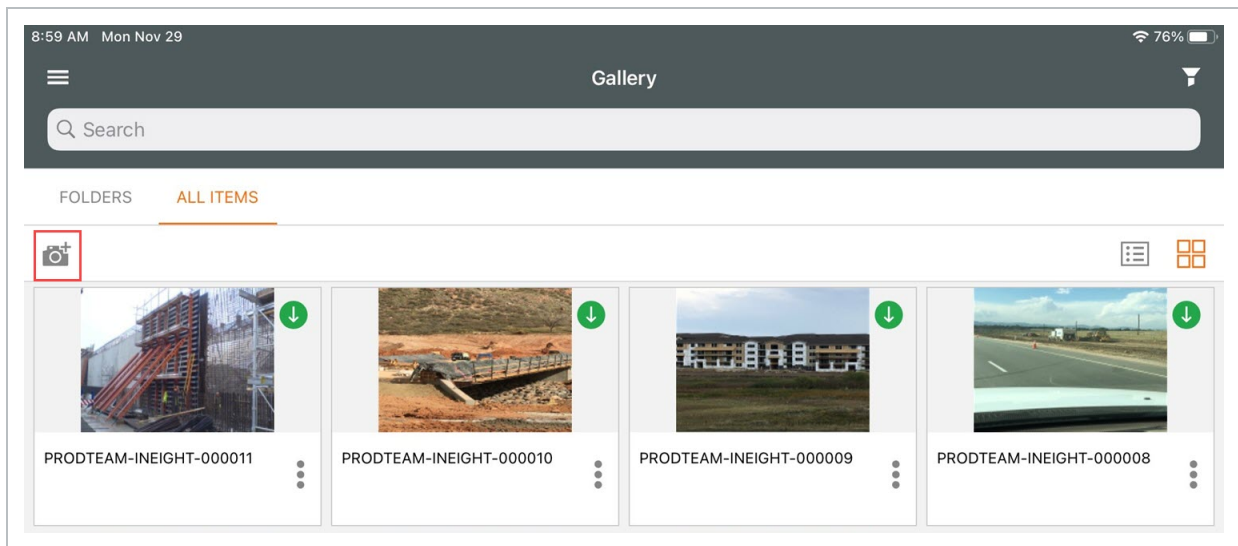
You can tap the download icon to download the image to your device. You can also view details, or manage links. Refer to [Manage document links](#) for more information about links.

1.27 ADD AN EXISTING IMAGE TO THE GALLERY

You can add items, such as a photograph, to the gallery from your mobile device.

You must allow Document to access the photo album on your device.

1. From the All items view of the Gallery, tap the **Add image** icon.



2. At the prompt, select **Upload images**. A dialog box with the images in your photo album opens.
3. Select an image, and then tap **Add**. The Save and link image dialog box opens.
4. Enter the image information. The Access level field is required; the others are optional.
5. Tap **Save**. The image is added to the gallery.

What's next: You can tap the download icon to download the image to your device. You can also view details or manage links. Refer to [Manage document links](#) for more information about links.

1.28 INEIGHT DOCUMENT MOBILE MAIL

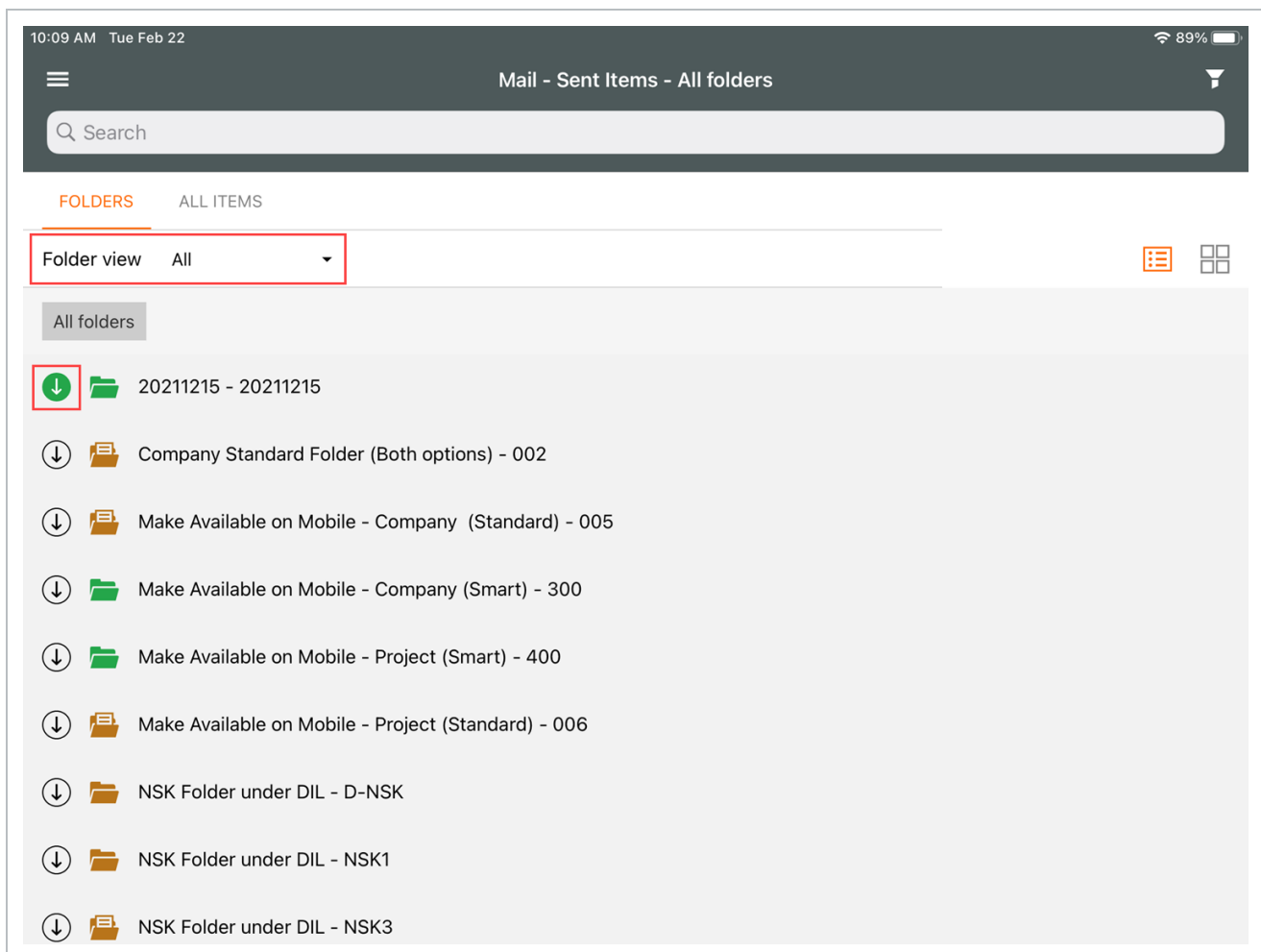
The Document Mobile Mail module gives you access to Document's Mail functions from your mobile device. You can use the Mobile Mail module to do the following:

- View items in your inbox or sent items box, including attachments
- Respond to or forward mail
- Create new mail
- Manage links
- Make available offline

1.29 INEIGHT DOCUMENT MOBILE MAIL REGISTER

The register opens first when you open the Inbox or Sent Items pages of the Mail module. The pages have the same structure. Each page has two views: Folders and All items.

When you enter the Mail module in the Folders view, a list of all folders shows in the register. Tap the **Folder view** drop-down list to see the contents of a specific folder.

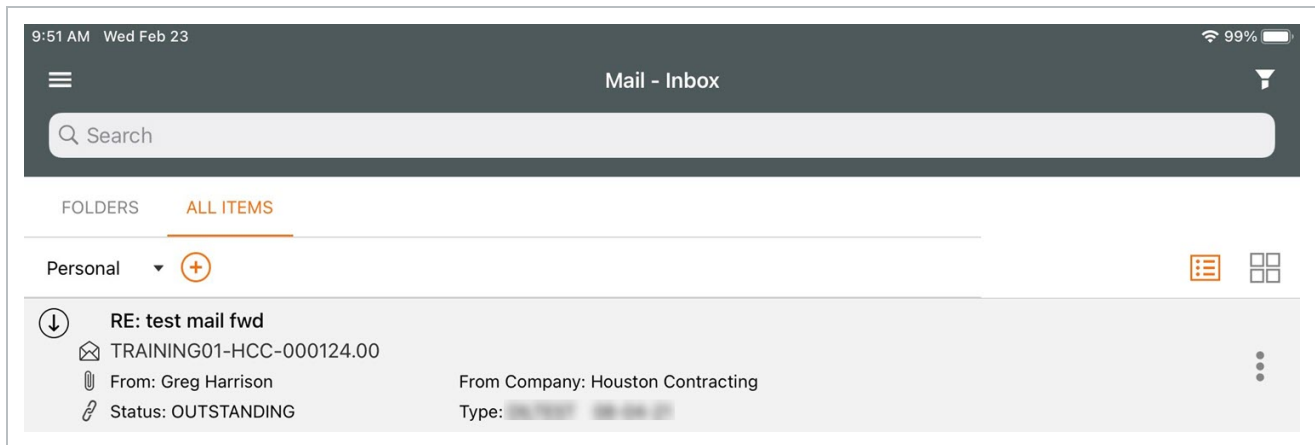


You can click the **Download** icon next to the folder to download all items.

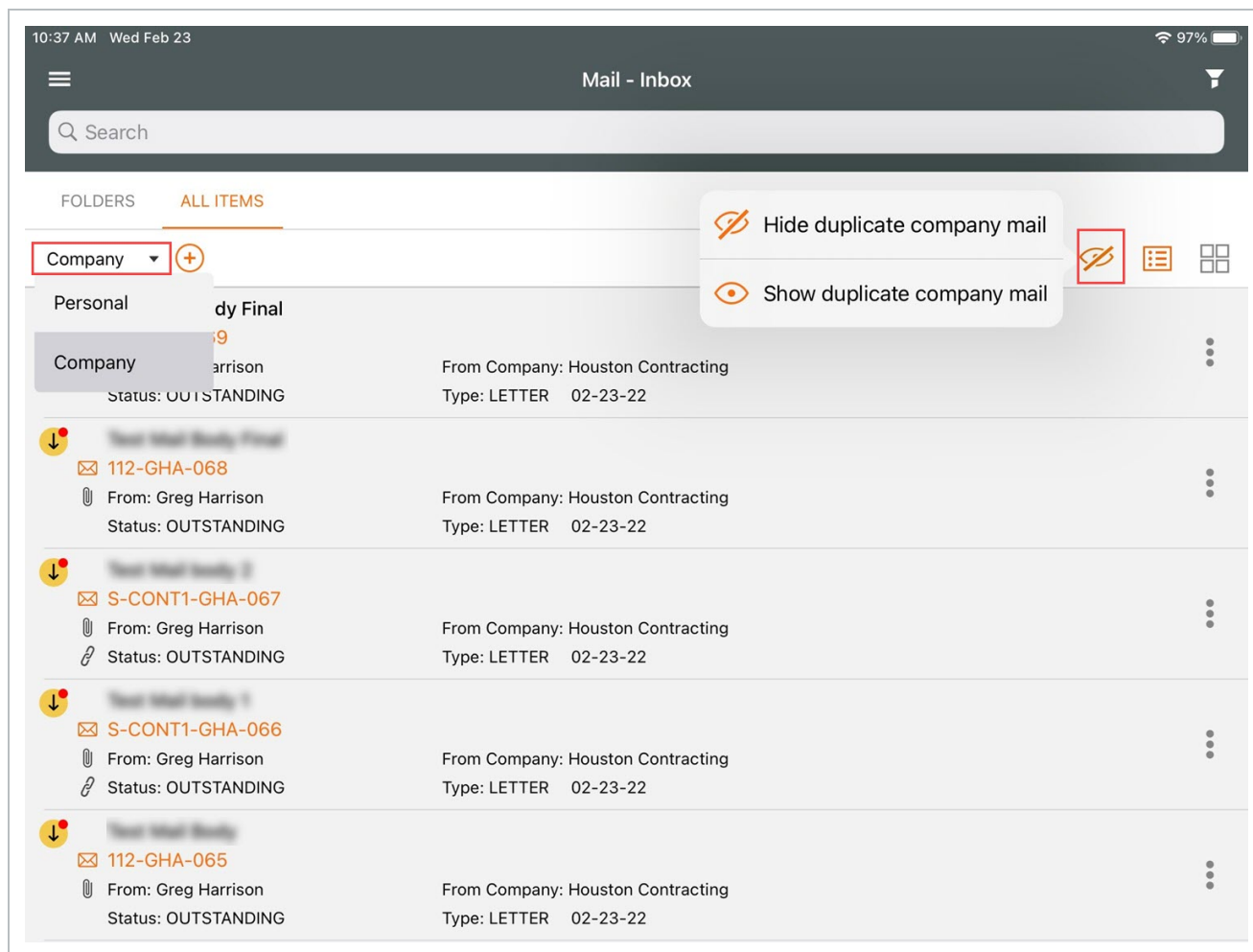
You can click the folder to open it. Each entry shows the following:

- Subject line
- Reference number

- Attachment indicator
- To user
- To company
- Links indicator
- Status
- Type



The All items view shows either personal or company email. You can expand the drop-down menu and select which view you want. When you are in the Company view, you can click the Hide icon to hide or show duplicate company mail.



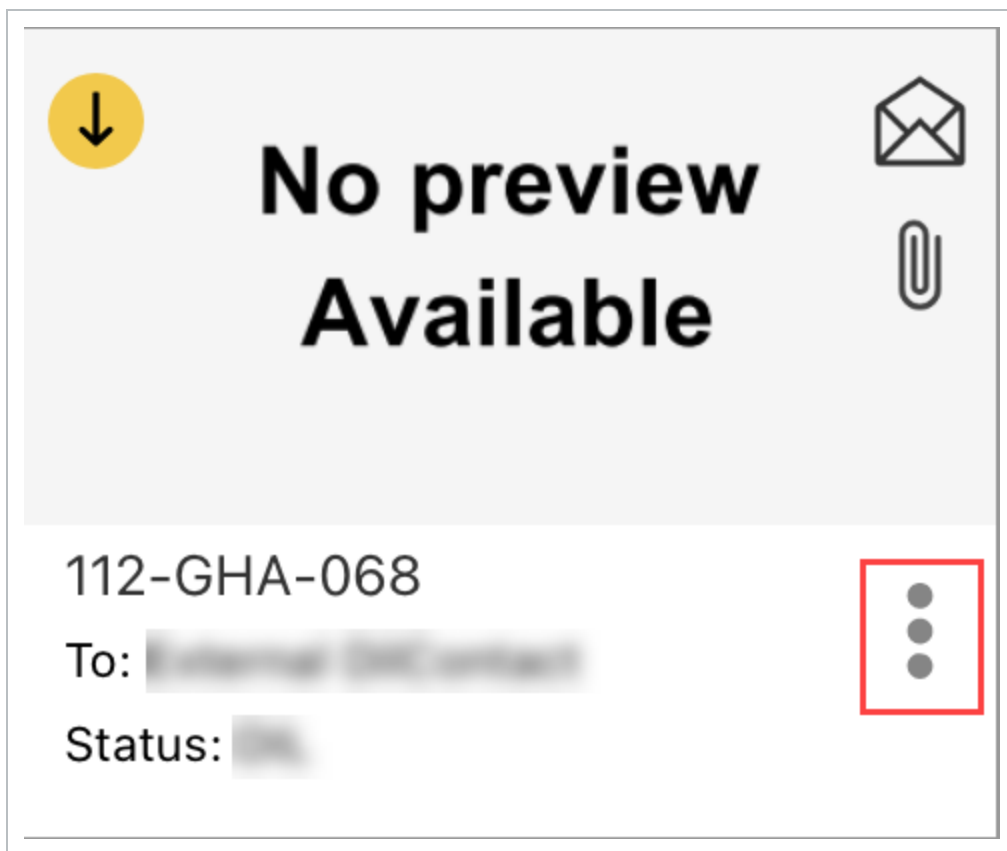
1.30 MANAGE LINKS

The links function in the mail module lets you add and view links to mail from the register without having to open the mail item.

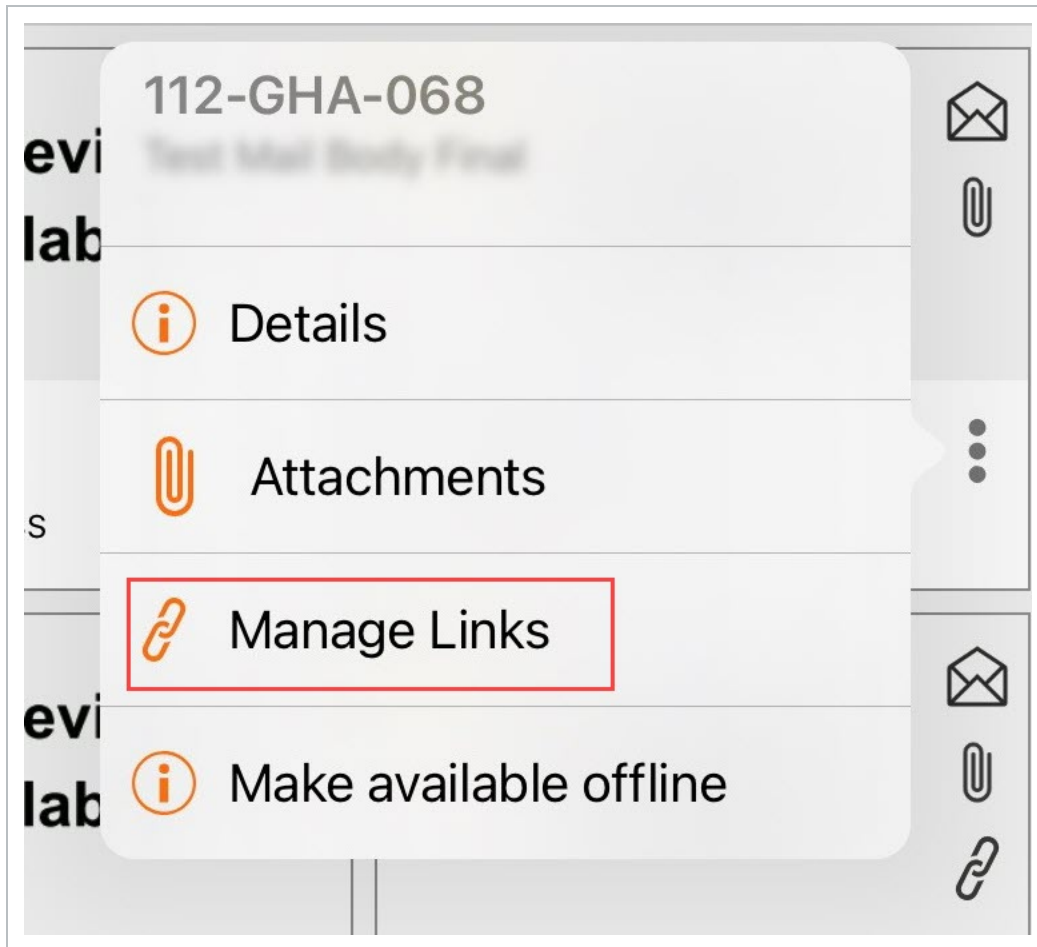
1.30.1 Add a link to an existing item

You can add a link to an existing item to mail.

1. Click the ellipsis in the mail line or tile.



2. Select **Manage Links** from the menu.

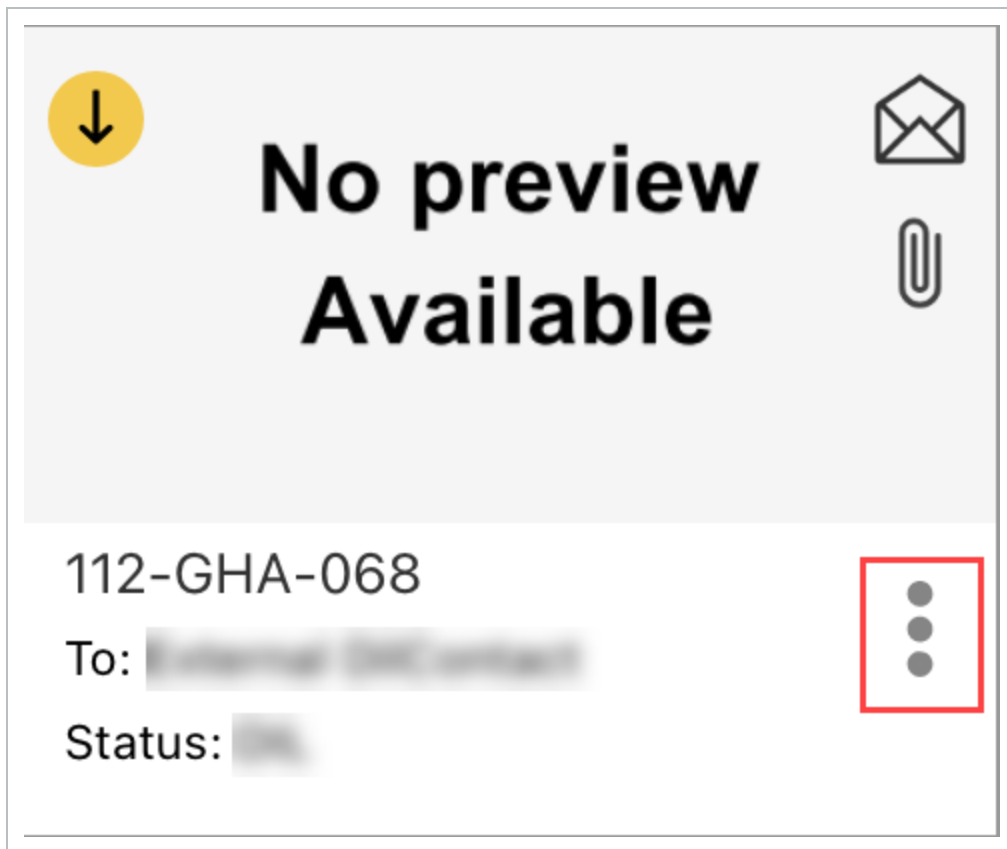


3. From the Manage linked items slide-out panel, tap **Add**, and then tap **Link existing item**. The Link existing item dialog box opens.
4. Select the item type. A list of available items opens.
5. Select one or more items, and then tap **Save**.

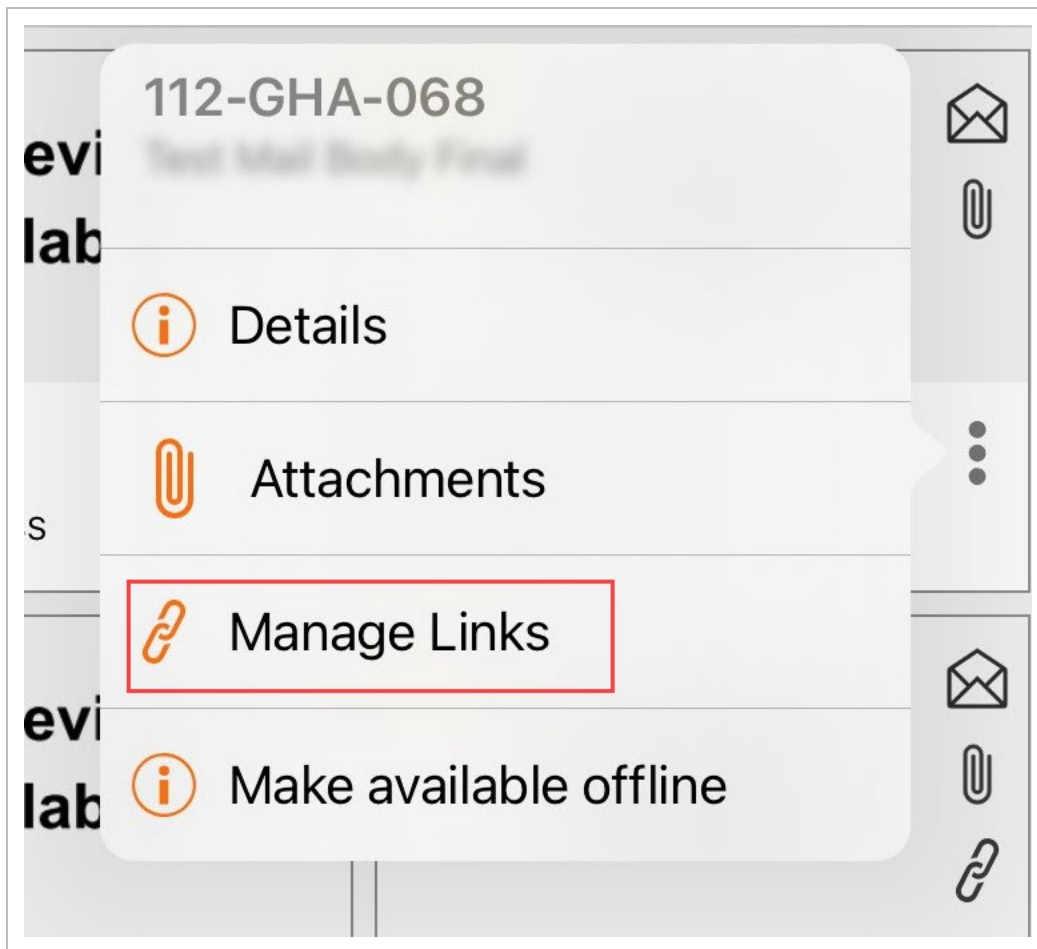
1.30.2 Add a link to a new item

You can create a new item and then link it to mail.

1. Click the ellipsis in the mail line or tile.



2. Select **Manage Links** from the menu.



3. From the Manage linked items slide-out panel, tap **Add**, and then tap **Link new item**.
4. Select the type (that is, Gallery, Forms, or Mail)
5. Select one or more items, and then tap **Save**.

Tap on the annotation to open the Manage linked items slide-out panel to manage the linked item or add more items.

1.31 READ AND RESPOND TO MAIL

To read mail, tap the relevant mailbox (that is Inbox or Sent mail), and then tap the mail you want to read. The mail opens. After you read the message, you can change the status, respond, or change the responded date.

2:06 PM Wed Feb 23

A120-GHA-061

Save

OUTSTANDING ▾

Responded:

Required by:
03-01-22

Letter

Reference No.: A120-GHA-061
Project Title: Training01 Project for Document

Date: 22 February 2022, 12:55:00 PM +05:30 **Response required by:** 01 March 2022
To: Greg Harrison, Houston Contracting
From: Greg Harrison, Houston Contracting
Subject: Link 1

Best Regards,
Greg Harisson

Discipline: 2233 **Area:** 444 **Location:** L112
Originator's Reference No.:

Disclaimer:
This is a confidential message intended for the named recipient only. The contents herein are privileged to the sender and the use thereof is restricted to the intended purpose. If you have received this e-mail in error, please secure its contents and reply to the sender. Thank you.



1.31.1 Change the status

To change the mail status, tap the down arrow in the status drop-down list in the top right toolbar, and then tap **Save**.

1.31.2 Change the responded date

You can change the responded date without having to respond to the mail message. The Responded field in the top right toolbar lets you change and save the date you responded to the mail.

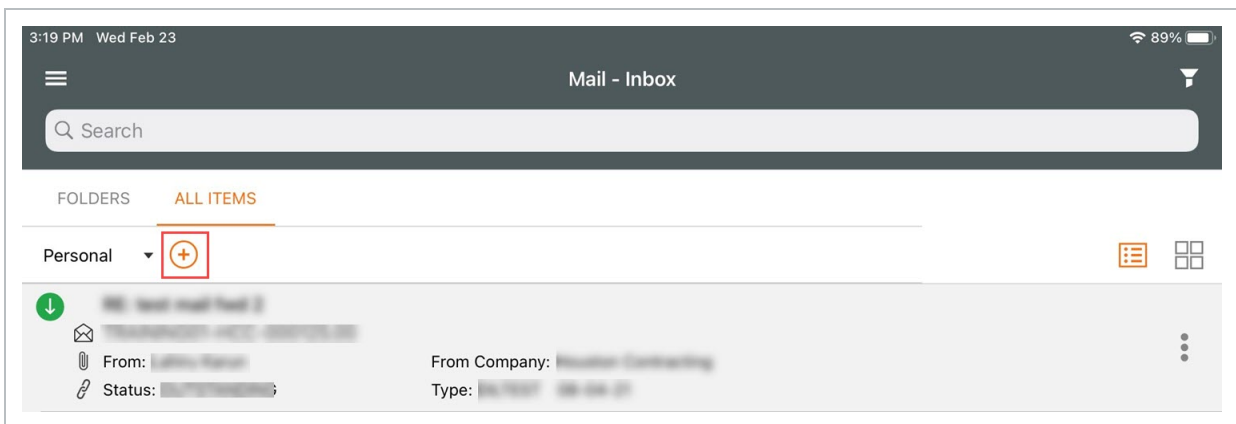
1.31.3 Respond to mail

You can reply, reply all, or forward a mail message. Tap the **Respond** button in the bottom toolbar, and then select an option. When you respond to a message you can also change the responded date in the message.

1.32 CREATE MAIL

To create mail, you must be in the All Items view of the Inbox or Sent Mail box.

1. Tap the **Add** icon in the top left toolbar. A list of mail types opens.



2. Select a mail type from the list. A template for the mail type opens.
3. Start typing the contact names into the To and Cc fields as required. You can also tap the **Add** icon on the right side of the fields to select contacts by company.
4. Enter values in the other required fields, such as subject, status, and discipline.
5. Type your message in the Message field.
6. When you are ready to send the mail, tap **Send**. Alternatively, you can tap **Save** to save the message and send it later.
7. If you chose to send the message, the send options, such as *Send* and *Send & close-out*, are shown. Choose a send option. The mail is sent.

If you saved the message, you can find the mail in the Drafts folder in the browser application.