OUTLOOK INTEGRATION USER GUIDE

DOCUMENT MANAGEMENT



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CHAPTER 1 – INTRODUCTION TO OUTLOOK INTEGRATION

The Outlook Integration Tool for use with InEight Document is a plug-in that enables users to view, send, and receive their InEight Document mail and Transmittals from within MS Outlook, rather than having to login to InEight Document. All actions relating to InEight Document mail/transmittals performed within MS Outlook are then stored back in the InEight Document system automatically.

| Features | Benefits |
|---|---|
| Access to the complete correspondence and transmittal message history of a project with all InEight Document formatting, custom fields and attributes including Reference Number, Discipline and Status retained. | Eliminates the need to use two different systems. The user automatically inherits a personal archive of all sent and received InEight Document project mail, segregated into separate projects in Outlook |
| Use of Outlook to create, send, and receive InEight Document mail and transmittals. | Familiarity with Outlook minimises need for additional training. |
| Complete status management. | Encourages the use of InEight Document project correspondence to be expedited and closed-out. |
| Offline capability. InEight Document mail is automatically downloaded into dedicated folders in Outlook. | Ability to read project correspondence offline and draft responses. |
| All overdue items highlighted in red for ease of identification | Quickly identify correspondence for which response is overdue |

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CHAPTER 2 – INSTALLING OUTLOOK INTEGRATION

- 1. Close Microsoft Outlook, if it is already open.
- 2. Download the installation package using one of the following links:
- Download 32-bit version of Microsoft Outlook
- Download 64-bit version of Microsoft Outlook

NOTE If you are unsure which version of Microsoft Outlook you are using, within Outlook select: File »Help »About Microsoft Outlook. For Office365 Users select File »Office Account »About Outlook

See also:



2.1 PRE-REQUISITES

- Windows (any)
- Outlook 2003 Onwards
- Dot Net Framework V 4.0

2.2 INSTALLATION STEPS

1. Once the download is complete, unzip the zip files.

| TBOutlookIntegratizip | |
|--|--|
| Open Always open files of this type | |
| Show in folder | |
| Cancel | |

2. Double click and run setup.exe from the extracted files.

| Name | Туре |
|-----------------------------------|---------------------------|
| DotNetFX40 | File folder |
| 📧 setup.exe | Application |
| 👘 TeamBinderOutlookIntegrationSet | Windows Installer Package |
| | |

| 🕼 TeamBinder Outlook Integration | - | | × |
|--|-----------------|--------------|---------|
| Welcome to the TeamBinder Outlook Integration Set | tup Wizard | | oftware |
| The installer will guide you through the steps required to install Tea on your computer. | mBinder Outlo | ook Integra | tion |
| WARNING: This computer program is protected by copyright law an Unauthorized duplication or distribution of this program or any portic civil or criminal penalties, and will be prosecuted to the maximum es law. | on of it, may r | esult in sev | vere |
| | Next | Cano | el |

3. Select a folder location for file installation. Select "Just Me" for yourself or "Everyone" in order to install for all who use the computer.

4. Click Next.

| 记 TeamBinder Outlook Integration — | |
|--|-------------|
| Select Installation Folder and Scope | \diamond |
| The installer will install TeamBinder Outlook Integration to the following folder. | QA Software |
| To install in this folder, click Next. To install to a different folder, enter it below or click Browse. | |
| Eolder: C:\Program Files\QA Software\TeamBinder Outlook Integration\ | Browse |
| Install TeamBinder Outlook Integration for yourself, or for anyone who uses this co | Disk Cost |
| CEveryone | |
| Just me | |
| Back Next | Cancel |

5. Select **Default Installation** then click **Next**.

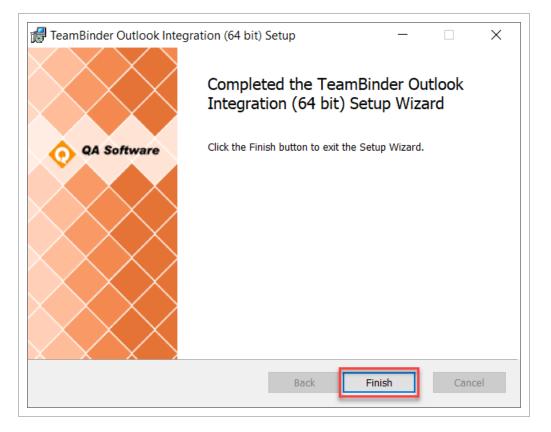
| TeamBinder Outlook Integration – | | \times |
|---|-------|----------|
| Select Installation Type | QA So | ftware |
| Select installation for TeamBinder Outlook Integration. | | |
| Default Installation Custom Installation | | |
| | | |
| Back Next | Cance | 91 |

NOTE The default Installation installs Outlook Integration with pre-defined settings. Custom Installation allows you to choose you own settings when installing Outlook Integration.

6. Click **Install** to begin installation.

| ReamBinder Outlook Integration (64 bit) Setup | - | | × |
|--|--------|--------------|----------|
| Ready to install TeamBinder Outlook Integration (64 bit) | | QA S | Software |
| Click Install to begin the installation. Click Back to review or change any o settings. Click Cancel to exit the wizard. | f your | installatior | 1 |
| Back | | Can | cel |

7. Once installation has completed, click **Finish**.



2.3 CUSTOM INSTALLATION SETTINGS

If **Custom Installation** is selected at step 5 in section 2.2 above then the window below will appear, allowing you to apply your custom installation settings. This allows you to specify additional settings especially if your corporate policies do not allow your outlook Data file to be stored in the default location or if specific proxy settings are required.

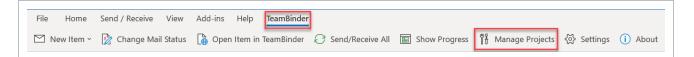
| Settings | | | |
|---------------------|--------------------------|--------------|--------|
| Proxy | | | |
| URL: | | | |
| Domain: | | | |
| User name: | | | |
| Password: | | | |
| | | | |
| Data store location | i: | | |
| Default | Roaming | ⊖ с | ustom |
| | | | |
| | | | |
| | | | |
| Enable auto up | date | | |
| Show Manage | Projects screen when Out | tlook starts | |
| L | | | |
| | Reset | ОК | Cancel |
| | | | |

- 1. Add Proxy information if required to connect to the internet. This will be pre-configured for all users of this InEight Document Outlook Integration instance.
- 2. Select the appropriate Data store location:
- **Default:** Data gets stored in the user's local application data folder.
- Roaming: Data is stored in the user's roaming application data folder.
- **Custom:** Used to specify a custom location. Although the network location drives can be specified, InEight does not recommend this as it leads to data corruption issues.
- 3. "Enable auto update" is selected by default. By deselecting this option auto update will be set to "Never" and the Outlook Integration user will not be able to change this setting.
- 4. "Show Manage Projects screen when Outlook starts" is selected by default. When deselected it will not show the manage projects screen when Outlook starts.

CHAPTER 3 – CONNECTING TO INEIGHT DOCUMENT FROM OUTLOOK

When starting Outlook for the first time after installation of the plug-in, you are prompted to identify which InEight Document Server/Projects you want to connect to.

If you are not prompted, click the Teambinder Tab and select "Manage Projects."



1. Click the **Add** button to connect one or more InEight Document projects to Outlook.

| Synchronise From | Get All | Enable Transmittals | Display Name | Server Name | Project No. | Project Title | Name | Compar | Add |
|---------------------|---------|------------------------|-----------------|----------------|-------------|---------------|------|--------|----------|
| | | | | | | | | | Change |
| | | | | | | | | | Remove |
| | | | | | | | | | Settings |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | ОК |

- 2. At the Login window select the appropriate server that your project is located on. This is the URL shown once logged into InEight Document. If you are unsure of the server details, contact the InEight Document Support Hotline.
- 3. Log in by entering your InEight Document **User ID, Company ID & Password** or Company Login then clicking **Login**. A list of the InEight Document Projects you have access to will then be displayed.

| Server Name: | aus18.teambinder.com |
|-----------------|----------------------------------|
| TeamBinder Logi | n Company Login (Single Sign-On) |
| User ID: | |
| Company ID: | |
| Password: | |

| | | connect with Outlook and set a sy I and unregistered mail are listed bu | | | |
|------|---------------|--|------------|-----------------------------------|---|
| Р | Project No. ▲ | Project Title | Get All | Download mail Sent/Received Since | ^ |
| FC | ORMSTRAIN | Forms Training Project | | 2/07/2020 | |
| TE | B5TR1 | TeamBinder5 Training Project | | 2/07/2020 | |
| TE | B5TRAINING | TeamBinder5 Training Test Pr | | 2/07/2020 | |
| Z TF | RAINING501 | InEight Document Training Proj | | 2/07/2020 | 1 |
| TF | RAINING502 | InEight Document Training Proj | | 2/07/2020 | |
| TF | RIAL501 | InEight Document Trial Project | | 2/07/2020 | |
| TF | RNSFR2 | Transfer Project 2 | | 2/07/2020 | |
| | | | | | 1 |

- 4. Select the Project(s) to synchronise with Outlook Integration.
- 5. Tick **Get All Mail** to download existing InEight Document Mail.

Warning: As this process could take a long time if you enter a very early date, entering a

date less than a month ago in the Download mail/Sent/Received Since column is recommended.

6. Click **OK** to confirm the selected projects.

 If Two Factor Authentication is enabled for the InEight Document account being added, Outlook Integration will prompt you to enter the 'Two Factor Authentication token' generated in your Authenticator App in your mobile device.

| Two Factor Authentication | × |
|--|------|
| Please enter a valid Two Factor Authentication to | ken: |
| Project No: Training 502 User ID: JF Company ID: HCC | |
| | |
| OK | |

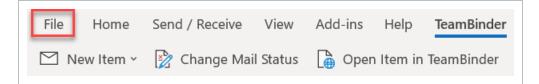
- To use a company login rather than your personal user login, at Step 3 above click on the Company Login (Single Sign-on) tab. The Company Login requires the email address linked to your InEight Document Account and is only available if InEight Document Single Sign-On is preconfigured for your company by InEight. Please contact your InEight Document account manager or Project Delivery Consultant for more information on this.
 - Use the Change button to change the user that is currently logged into the same project. Then enter new login details.
 - To limit the size of attachments downloaded into Outlook from InEight Document before adding a project, click the Settings button and select the General then adjust the size limit for file attachments against the option Download mail or transmittal attachments equal or less then (KB).
 - To change the Title of the project within Outlook simple double click on the Project Title field in the Manage Projects window (this can be useful if you want to add the same project more than once for different user lds.)
 - The date from which mail/transmittals are synchronised can also be modified by double clicking on the Synchronise From" field.

See also:

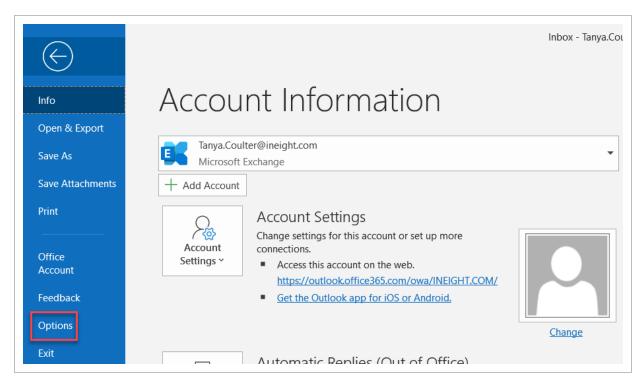
3.1 TEAMBINDER TAB NOT VISIBLE

If the Teambinder Tab is not visible when Outlook is first opened, it is able to be installed manually.

1. Click File.



2. Select **Options.**



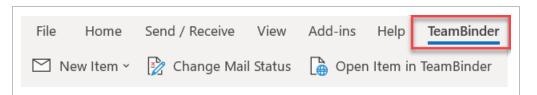
3. Click Add-ins on the left-hand bar and navigate down to Manage >>Com Add-Ins. Click Go.

| Outlook Options | | | ? | > |
|----------------------|--|--------------------------------|------------|-----|
| General | - View and manage Missaget Office Add ing | | | |
| Mail | View and manage Microsoft Office Add-ins. | | | |
| Mali | | | | |
| Calendar | Add-in Options | | | |
| Groups | Launch Add-in options dialog: Add-in Options | | | |
| People | Add-ins | | | |
| Tasks | Add-Ins | | | |
| C | Name 🔺 | Location | Туре | |
| Search | Active Application Add-ins | | | Γ |
| Language | GoToMeeting Outlook COM Addin | C:\956\G2MOutlookAddin64.dll | COM Add-in | |
| | Microsoft Exchange Add-in | C:\DDINS\UmOutlookAddin.dll | COM Add-in | |
| Ease of Access | Microsoft SharePoint Server Colleague Import Add-in | C:\DDINS\ColleagueImport.dll | COM Add-in | |
| Advanced | Microsoft Teams Meeting Add-in for Microsoft Office | C:\osoft.Teams.AddinLoader.dll | COM Add-in | |
| | OneNote Notes about Outlook Items | C:\root\Office16\ONBttnOL.dll | COM Add-in | |
| Customize Ribbon | Outlook Social Connector 2016 | C:\16\SOCIALCONNECTOR.DLL | COM Add-in | |
| Ouick Access Toolbar | Productivity Tools | C:\bex\Plugins\ptolkadd64.dll | COM Add-in | |
| Quick Access Toolbal | Skype Meeting Add-in for Microsoft Office | C:\\root\Office16\UCAddin.dll | COM Add-in | |
| Add-ins | TeamBinder Outlook Integration | mscoree.dll | COM Add-in | - |
| Trust Center | Inactive Application Add-ins | | | |
| | BluebeamOfficeAddIn | mscoree.dll | COM Add-in | |
| | Microsoft Access Outlook Add-in for Data Collection and Publishing | C:\ice16\ADDINS\ACCOLK.DLL | COM Add-in | • |
| | Add-in: GoToMeeting Outlook COM Addin | | | |
| | Publisher: LogMeln, Inc. | | | |
| | Compatibility: No compatibility information available | | | |
| | Location: C:\Users\tanya.coulter\AppData\Local\GoToMeetir | na\17956\G2MOutlookAddin64.dll | | |
| | | | | |
| | Description: GoToMeeting Outlook COM Addin | | | |
| | | | | |
| | | | | |
| | Manage: COM Add-ins 🔻 Go | | | |
| | COM Add-ins | | | |
| | Disabled Items | | | |
| | Disabled items | OK | Can Can | cei |

4. Scroll down to **Teambinder Outlook Integration** and tick the check box to enable the plug in. Click **OK**.

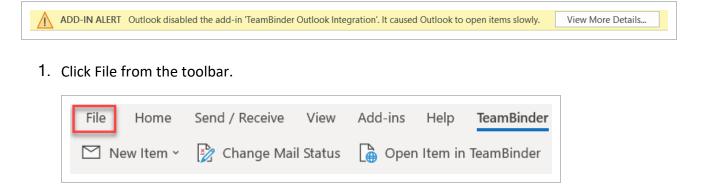
| COM Add-ins | ? × |
|--|----------------|
| لطd-ins available: ☑ Microsoft SharePoint Server Colleague Import Add-in | ок |
| Microsoft Teams Meeting Add-in for Microsoft Office Microsoft VBA for Outlook Addin | Cancel |
| OneNote Notes about Outlook Items Outlook Social Connector 2016 Productivity Tools | <u>A</u> dd |
| Clype Meeting Add in for Microsoft Office TeamBinder Outlook Integration | <u>R</u> emove |
| ocation: mscoree.dll | |
| oad Behavior: Load at Startup | |
| | |

5. The **Teambinder Tab** is now enabled.

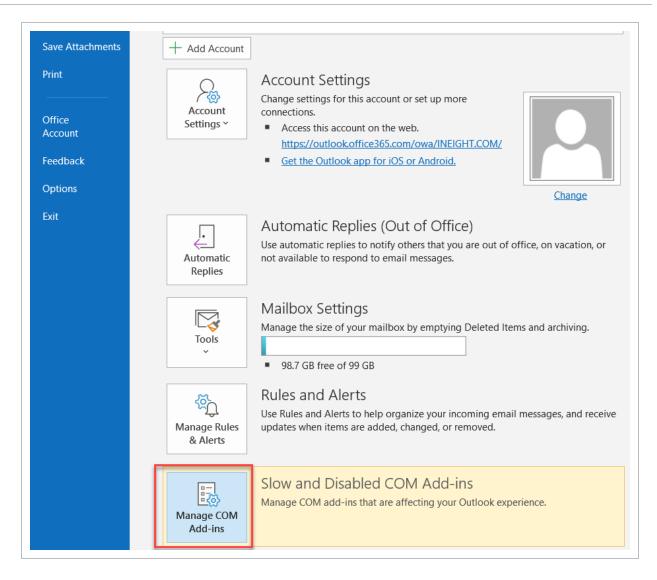


3.2 OUTLOOK ADD-IN WARNINGS

If you receive an **Add-In Alert** from Outlook advising that your Add-In is causing Outlook to run slowly and has been disabled, you can change the settings to **Always Enable the Outlook Integration Add-In**.



2. Select the Manage COM Add-ins button.



3. Click Options to expand. Click the Always enable this add-in radio button, click Apply.

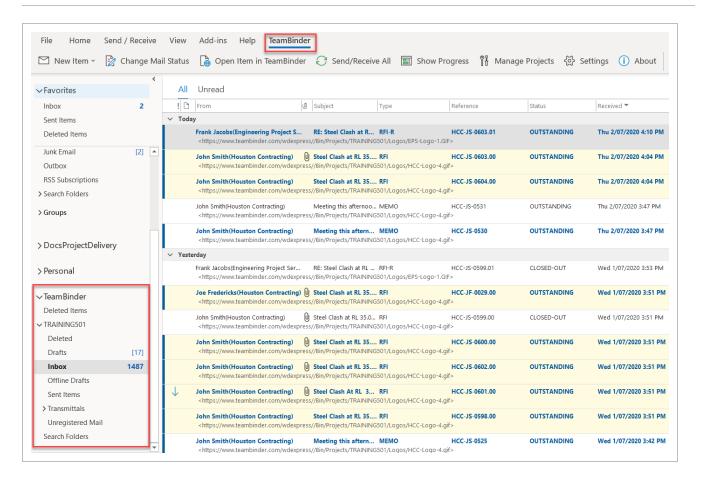
| Add-ins | | ? > | × |
|--|--|------------|----|
| Slow and Disabled Add-ins | | | |
| These add-ins decreased performance or caused Outlook to crash. F the affected add-ins. | For support with these issues, contact the | e vendor (| of |
| | | | |
| Productivity Tools ATLCOM Outlook Addin | Average delay: 0.03 seconds | | |
| This add-in caused Outlook to start slowly. As a result, it was disabled. | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | Close | |

4. A new set of options will be provided, select **Do not monitor this Add-in for the next 30 days**. Click **Apply** and **Close**.

| These add-ins decreased performance or caused Outlook to crash. For su he affected add-ins. .earn more Productivity Tools ATLCOM Outlook Addin This add-in caused Outlook to start slowly. It wasn't disabled because it's in the A 4 Options Always monitor this add-in Do not monitor this add-in for the next 7 days Do not monitor this add-in for the <u>next 30 days</u> Disable this add-in | Average delay: 0.03 seconds |
|---|-----------------------------|
| Productivity Tools ATLCOM Outlook Addin This add-in caused Outlook to start slowly. It wasn't disabled because it's in the A Options Always monitor this add-in Do not monitor this add-in for the next 7 days Do not monitor this add-in for the <u>n</u> ext 30 days Disable this add-in | 2 . |
| ATLCOM Outlook Addin This add-in caused Outlook to start slowly. It wasn't disabled because it's in the A Options Always monitor <u>th</u> is add-in Do not <u>monitor this add-in for the next 7 days</u> Do not monitor this add-in for the <u>next 30 days</u> Disable this add-in | 2 . |
| This add-in caused Outlook to start slowly. It wasn't disabled because it's in the A | 2 . |
| Options Always monitor this add-in Do not monitor this add-in for the next 7 days Do not monitor this add-in for the <u>next 30 days</u> <u>D</u>isable this add-in | Always Enable list. |
| Options Always monitor this add-in Do not monitor this add-in for the next 7 days Do not monitor this add-in for the <u>next 30 days</u> <u>D</u>isable this add-in | |
| Always monitor this add-in Do not monitor this add-in for the next 7 days Do not monitor this add-in for the next 30 days Disable this add-in | |
| Do not monitor this add-in for the next 7 days Do not monitor this add-in for the next 30 days Disable this add-in | |
| Do not monitor this add-in for the <u>n</u>ext 30 days <u>D</u>isable this add-in | |
| | |
| | |
| Apply | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

CHAPTER 3 – CREATING NEW INEIGHT DOCUMENT MAIL

From the InEight Document Tab you can manage all the normal InEight Document mail functions within Outlook. The InEight Document registers (mail and transmittals) are displayed below the Project folder within the InEight Document set of folders as shown below.



- 1. From the InEight Document tab within Outlook click **New Item** or **InEight Document New Item** from the Home tab.
- 2. Select the Project, choose **Mail** then select the mail type from the drop-down list. This opens the mail compose screen as you would see it in InEight Document.

| File Home Se | nd / Receive | Viev | w Add-ins Help <mark>TeamBir</mark> |
|----------------------|--------------|---------|--|
| 🖄 New Item 🖌 🦻 | ? Change Mai | l Stati | us 🛛 🗎 Open Item in TeamBind |
| TRAINING501 > | 🗋 Mail | > | Client Advice |
| Inbox | Transmitta | al > | Commercial |
| Sent Items | | ~ т | Design Instruction |
| Deleted Items | | | Letter |
| Junk Email | [2] | | Memorandum |
| Outbox | | | Non Conformance Report |
| RSS Subscriptions | | | Request for Information |
| > Search Folders | | | Site Instruction |
| > Groups | | | Tender Query |
| > DocsProjectDeliver | y | ~ Y | Variation Order Variation Request |

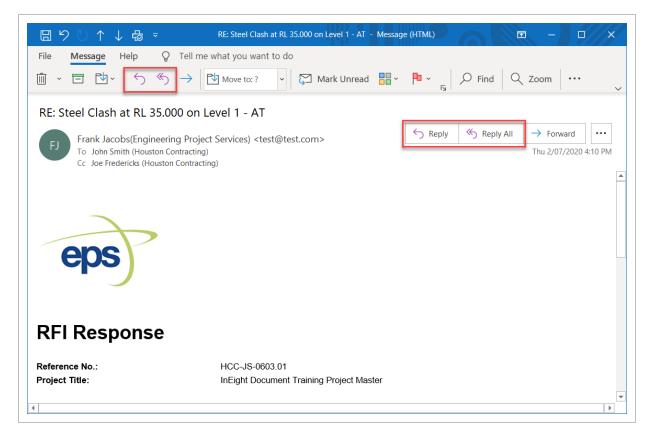
- 3. To add recipient(s), select the "To" and "CC" button or begin typing contacts names and select from suggested users.
- 4. Create and send mail as per normal in InEight Document.
- **NOTE** Recipient contact details are from the InEight Document Project Address Book and not from the Outlook Address Book.

CHAPTER 3 – MANAGING MAIL WITHIN OUTLOOK

1. To open Outlook Integration mail with the same formatting and fields available as in InEight Document, select the mail in the register and click the **Open Item in InEight Document** button.

| | end / Receive | View | Add-ins Help TeamBi | _ | | | 97 | 8 | |
|-------------------|---------------|----------|---|------|--|-------------------------|-----------------|-------------------|------------------------|
| 🖄 New Item 🖌 🚦 | Change Mai | I Status | Open Item in TeamBin | der | Send/Receiv | e All 🔡 Show Pro | ogress 📲 Manage | Projects 527 Sett | ings () About |
| | < | | | | | | | | |
| Favorites | | All | Unread | | | | | | |
| Inbox | 2 | ! 🗅 | From | U | Subject | Туре | Reference | Status | Received 💌 |
| Sent Items | | ✓ Toda; | у | | | | | | |
| Deleted Items | | | Frank Jacobs(Engineering Project States) https://www.teambinder.com/wde | | RE: Steel Clash at R s//Bin/Projects/TRAINING | | HCC-JS-0603.01 | OUTSTANDING | Thu 2/07/2020 4:10 PM |
| Junk Email | [2] | | John Smith(Houston Contracting) | ົດ | Steel Clash at RI 35 | REI | HCC-JS-0603.00 | OUTSTANDING | Thu 2/07/2020 4:04 PM |
| Outbox | | | <https: td="" wde<="" www.teambinder.com=""><td></td><td></td><td></td><td></td><td>oorbranbing</td><td>1111 2/01/2020 4.04 PM</td></https:> | | | | | oorbranbing | 1111 2/01/2020 4.04 PM |
| RSS Subscriptions | | | John Smith(Houston Contracting) | | Steel Clash at RL 35 | . RFI | HCC-JS-0604.00 | OUTSTANDING | Thu 2/07/2020 4:04 PM |
| Search Folders | | | <https: td="" wde<="" www.teambinder.com=""><td>pres</td><td>s//Bin/Projects/TRAINING</td><td>501/Logos/HCC-Logo-4.gi</td><td>f></td><td></td><td></td></https:> | pres | s//Bin/Projects/TRAINING | 501/Logos/HCC-Logo-4.gi | f> | | |

- 2. To reply to an InEight Document mail when opened from the **Open Item in InEight Document** tab, click the **Reply** or **Reply All** button. If there is more than one mail type configured for the response, select from the list of mail types to use for your reply as normal.
- 3. To reply to an InEight Document mail from within **Outlook**, select the InEight Document mail item you wish to respond to and open it. Then click the **Reply** or **Reply All** button. If there is more than one mail type configured for the response, select from the list of mail types to use for your reply as normal.



See also:

3.1 CHANGE MAIL STATUS

1. To change the Status of a Mail: Select mail item(s) from the appropriate inbox and then click the **Change Mail Status** button from the InEight Document tab and update as required.

| TeamBind | er - Change Mail St | atus |
|----------|---------------------|--------|
| Status: | Closed-out | ~ |
| _ | ок | Cancel |

| | Send / Receive | | Add-ins Help TeamBinde | - | 📰 Show Progress 📲 I | Manage Projects - 〈핫 So | ettings (i) About |
|----------------------------------|----------------|--------|--|--|--|-------------------------|-----------------------|
| ∽ Favorites | < | All | Unread | | | | |
| Inbox | 4 | ! 🗅 | From |) Subject Type | Reference | Status | Received 🔻 |
| Sent Items | | ∨ Toda | у | | | | |
| Deleted Items | | | Frank Jacobs(Engineering Project Ser <https: td="" wdexpre<="" www.teambinder.com=""><td>RE: Steel Clash at RL RFI-R ss//Bin/Projects/TRAINING501/Lo</td><td>HCC-JS-0603.01 igos/EPS-Logo-1.GIF></td><td>OUTSTANDING</td><td>Thu 2/07/2020 4:10 PN</td></https:> | RE: Steel Clash at RL RFI-R ss//Bin/Projects/TRAINING501/Lo | HCC-JS-0603.01 igos/EPS-Logo-1.GIF> | OUTSTANDING | Thu 2/07/2020 4:10 PN |
| Junk Email Outbox | [2] | | John Smith(Houston Contracting) <https: td="" wdexpre<="" www.teambinder.com=""><td>Steel Clash at RL 35 RFI ss//Bin/Projects/TRAINING501/Lo</td><td>HCC-JS-0603.00 Igos/HCC-Logo-4.gif></td><td>OUTSTANDING</td><td>Thu 2/07/2020 4:04 P</td></https:> | Steel Clash at RL 35 RFI ss//Bin/Projects/TRAINING501/Lo | HCC-JS-0603.00 Igos/HCC-Logo-4.gif> | OUTSTANDING | Thu 2/07/2020 4:04 P |
| RSS Subscriptions Search Folders | | | John Smith(Houston Contracting) <https: td="" wdexpre<="" www.teambinder.com=""><td>Steel Clash at RL 35 RFI ss//Bin/Projects/TRAINING501/Lo</td><td>HCC-JS-0604.00 gos/HCC-Logo-4.gif></td><td>OUTSTANDING</td><td>Thu 2/07/2020 4:04 P</td></https:> | Steel Clash at RL 35 RFI ss//Bin/Projects/TRAINING501/Lo | HCC-JS-0604.00 gos/HCC-Logo-4.gif> | OUTSTANDING | Thu 2/07/2020 4:04 P |
| > Groups | | | John Smith(Houston Contracting) <https: td="" wdexpre<="" www.teambinder.com=""><td>Meeting this afternoo MEM ss//Bin/Projects/TRAINING501/Lo</td><td></td><td>OUTSTANDING</td><td>Thu 2/07/2020 3:47 PN</td></https:> | Meeting this afternoo MEM ss//Bin/Projects/TRAINING501/Lo | | OUTSTANDING | Thu 2/07/2020 3:47 PN |

2. To do a Send and Receive refresh between Outlook and InEight Document click the **Send/ Receive All** button.

| File Home | Send / Receive View | Add-ins Help TeamBinder |
|--------------|----------------------|---|
| 🖄 New Item ~ | 🄀 Change Mail Status | 🕞 Open Item in TeamBinder 📿 Send/Receive All 🔄 Show Progress 🚏 Manage Projects 🔅 Settings (j) About |

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CHAPTER 4 – OFFLINE ACCESS AND MAIL CREATION

If there is no internet connectivity or Outlook is in offline mode, new mail cannot be sent or received from InEight Document. However, existing mail already synchronized with Outlook can be accessed and offline drafts created (although not with the InEight Document specific fields) and stored in an offline folder. This draft is then sent through InEight Document once connectivity is regained and after the final draft is completed.

For more information, see the link below.

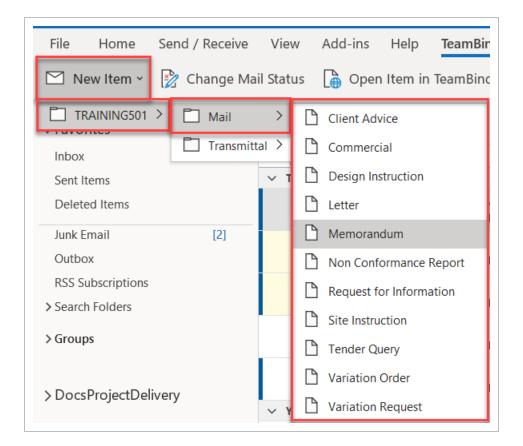
| 4.1 Drafting mail offline |
|---------------------------|
|---------------------------|

4.1 DRAFTING MAIL OFFLINE

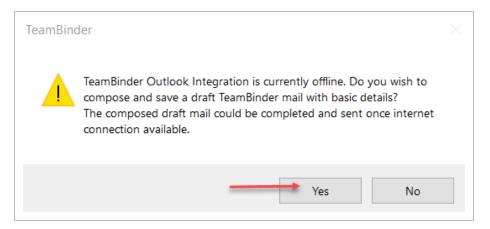
1. Select **Work Offline** mode from the Send/Receive tab.

| | iew Add-ins Help TeamBinder | |
|---------------------------------|--|--|
| ⊖ Send/Receive All Folders > Se | nd All 📴 Update Folder 🛱 Send/Receive Groups - | Show Progress Cancel All 🛞 Work Offline |

2. Click on the **New Mail** button.



3. Select a Mail type from the list. You will receive the following message, select Yes.



4. Add the relevant details to the Mail.

| 🖫 ២ ὒ ↑ ↓ = | | | | Offline Mail - | dessage (HTML) | | | | | | | •// |
|-------------------------------------|------------------|------------|---------------------|----------------|-----------------|---------|------|------|--------------|-------------|------------------|-----|
| File Message Insert O | ptions Format Te | ext Review | Help | ♀ Tell me v | hat you want to | o do | | | | | | |
| 🗂 ~ 🚿 Calibri | ✓ 11 ✓ B | ΙU | <i>₽</i> ~ <u>A</u> | · 🗄 · | <u>€</u> ≣ | · _ 0 · | °° , | Z~ ! | \downarrow | Po ~ | S ^e ~ | |
| | | | | | | 13 | | | | | | |
| From V Joe F | iredericks | | | | | | | | | | | |
| Send To <u>Tany</u> | a Coulter | | | | | | | | | | | |
| Cc | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Subject Offlin | ne Mail | | | | | | | | | | | |
| | | | | | | | | | | | | |
| i Tanya | | | | | | | | | | | | |
| | numoses | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |
| his is an offline mail for training | | | | | | | | | | | | |

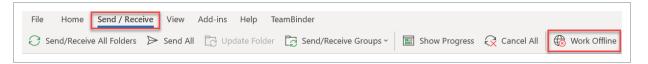
5. Click the **Send** button. An InEight Document message will be displayed, click **OK**.

| TeamBin | der | × |
|---------|--|---|
| | TeamBinder mails composed offline, can only be sent and synchronized with TeamBinder when an internet connection is available. | |
| | ОК | |

6. A draft has now been saved in the **Offline Drafts** folder.

| File Home | Send / Receive | View | Developer | Add-ins | Help | TeamBinder | |
|------------------|----------------|-----------|------------------------------------|-------------|--|----------------------------------|--------------|
| 🖄 New Item ~ | 훩 Change Ma | il Status | 🔓 Open li | tem in Team | Binder | C Send/Receiv | e All 📱 |
| ∽ Favorites | < | All | Unread | | | | |
| Inbox | 3 | ! 🗅 | То | () Subje | :t | Туре | |
| Sent Items | | ✓ Today | / | | | | |
| Deleted Items | | 2 | Tanya Coulter Hi Joe Twill be a | | n <mark>g tomorro</mark> out may be | w MEMO late. TeamBinder_signa | ture_will_be |
| > Tanya.Coulter@ | INEIGHT.COM | _ | | | | | |
| > DocsProjectDe | livery | | | | | | |
| > Personal | | | | | | | |
| ∽TeamBinder | | | | | | | |
| Deleted Items | | | | | | | |
| ✓ TRAINING501 | | | | | | | |
| Deleted | | | | | | | |
| Drafts | | | | | | | |
| Inbox | 172 | | | | | | |
| Offline Drafts | [1] | | | | | | |
| Sent Items | | | | | | | |

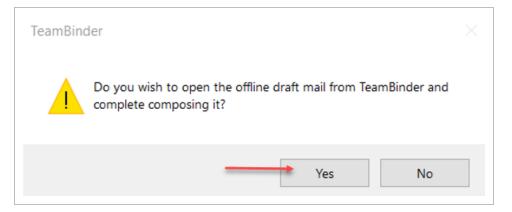
7. Reconnect by switching the **Work Offline** button off again.



8. Select the **Offline Drafts** Folder, open the draft mail item.

| File Home | Send / Receive | View D | eveloper | Add-ins | Help | TeamBinder | |
|------------------|----------------|-----------|---|------------|--------------------------|---------------------------------------|---------|
| 🖄 New Item - | 📝 Change Ma | il Status | 🔓 Open It | em in Team | Binder | C Send/Receive Al | |
| ∽Favorites | ۲ | All U | nread | | | | |
| Inbox | 3 | ! 🗅 То | | 🕖 Subje | ct | Туре | |
| Sent Items | | ∨ Today | | | | | |
| Deleted Items | | | y <mark>a Coulter</mark> oe Twill be a | | ng tomorro but may be | w MEMO late. TeamBinder_signature_ | will_be |
| > Tanya.Coulter@ | INEIGHT.COM | | | | | | |
| > DocsProjectDe | livery | | | | | | |
| > Personal | | | | | | | |
| ∨TeamBinder | | | | | | | |
| Deleted Items | | | | | | | |
| ✓ TRAINING501 | | | | | | | |
| Deleted | | | | | | | |
| Drafts | | | | | | | |
| Inbox | 172 | | | | | | |
| Offline Drafts | [1] | | | | | | |
| Sent Items | | | | | | | |
| | | | | | | | |

9. You will receive the following message, click Yes.



10. As you were not connected to InEight Document when the draft mail was created, the recipient will need to be selected. In the **InEight Document Contact** field, select the recipient from the drop-down list. Click **OK**.

| valid recipients | invalid and will not be added into the | created TeamB | inder draft mail. | | | |
|---------------------------------------|---|-----------------------------------|--|---|----|--------|
| t a valid TeamBin ote: Same TeamBi | der contact could be selected for the lis nder contact selected more than once | sted Outlook c will be ignored | ontact(s) that maps to multiple Tea | | | |
| Name | EMail | To/Cc/Bcc | TeamBinder Contact | Reason | | |
| Tanya Coulter | Tanya.Coulter@INEIGHT.COM | То | ~ | fore than one valid contact exists in TeamBinder. | | |
| | | | Boof Coulter (TC Company) Summer Coulter (TC Company) Tanya Coulter (TC Company) | | | |
| | | | | | ок | Cancel |

- 11. The Draft will open in InEight Document, complete the relevant fields and click **Send**.
- 12. The mail is now visible in InEight Document.

| All | Unread | | | | | | | By Date 🗸 |
|-----|--|--|--|-------------|-------------------------|---------|-------|--------------|
| ! 🗅 | From Ø Subject | Туре | Reference | Status | Received 🔻 | DueDate | Size | Categories 😤 |
| Tod | av. | | | | | | | |
| | | | HCC-JF-0073 AINING501/Logos/HCC-Logo-4.gif> | OUTSTANDING | Fri 19/06/2020 10:24 AM | None | 13 KB | |
| Wed | Inesday | | | | | | | |
| | Joe Frederic Offline M <https: td="" www.teambinder.c<=""><td></td><td>HCC-JF-0071 AINING501/Logos/HCC-Logo-4.gif></td><td>OUTSTANDING</td><td>Wed 17/06/2020 11:34 AM</td><td>None</td><td>13 KB</td><td></td></https:> | | HCC-JF-0071 AINING501/Logos/HCC-Logo-4.gif> | OUTSTANDING | Wed 17/06/2020 11:34 AM | None | 13 KB | |
| Two | Weeks Ago | | | | | | | |
| | | next week MEMO om/wdexpress//Bin/Projects/TRJ | HCC-JF-0070 AINING501/Logos/HCC-Logo-4.gif> | OUTSTANDING | Thu 4/06/2020 4:24 PM | None | 13 KB | |
| | Joe Frederi Meeting | this week MEMO | HCC-JF-0069 | OUTSTANDING | Thu 4/06/2020 4:15 PM | None | 13 KB | |

CHAPTER 5 – UNREGISTERED MAIL

Outlook mail can be dragged and dropped directly into InEight Document using the Outlook Integration Unregistered Mail folder. Mail remains Unregistered until it is processed, (ie all mandatory fields completed, and mail sent).

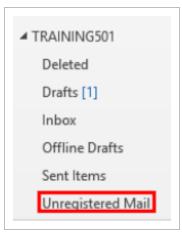
The Unregistered Mail folder appears below the Sent Items folder in Outlook and is available if users have personal access to the unregistered mail function in InEight Document.

For users without access to the Unregistered Mailbox in InEight Document, access must be granted by an Administrator.

For more information, see the link below.

5.1 IMPORTING UNREGISTERED OUTLOOK MAIL INTO INEIGHT DOCUMENT

1. Drag Outlook mail to the Unregistered Mail Folder for the appropriate project.



- 2. Open the unregistered mail and complete all mandatory fields including the **To** and **CC** field mail recipient(s) and Mail **Type**.
- 3. Click Send.
- 4. The Mail will now appear in the recipient(s) InEight Document Inbox as well as their Outlook Integration InEight Document Inbox (if they have Outlook Integration).

NOTE

- When an offline draft is being processed into InEight Document by the user, if recipient emails map to multiple contacts in InEight Document, the user can choose which contact should be selected.
- Outlook Integration will NOT move the original mail item.
- The unregistered mail folder will only appear in Outlook Integration if personal unregistered boxes are activated in InEight Document.

CHAPTER 6 – TRANSMITTALS

From the InEight Document Tab you can manage a number of InEight Document Transmittal functions using Outlook.

| 🖄 New Item 👻 📝 Cha | ange Mail Sta | tus 🗋 Open Item in Te | amBinder 📿 Send/Receive All 🔚 | Show Progress 📲 Manag | ge Projects {సූ | Settings (i) About |
|-------------------------------------|---------------|---|--|---|-----------------|------------------------------|
| - Favorites | * | All Unread | | | | |
| Inbox | 4 |) 🕖 From Receive | d 🔻 | Subject | Reference | Company |
| Sent Items | ~ | Older | | | | |
| Deleted Items | | Adrian Hinkley (Eng Mon 11 Document Transmittal | /05/2020 4:04 PM <https: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>Electrical Drawings - Issued for Revie ojects/TRAINING501/Logos/EPS-Logo-1</td><td></td><td>Engineering Project Services</td></https:> | Electrical Drawings - Issued for Revie ojects/TRAINING501/Logos/EPS-Logo-1 | | Engineering Project Services |
| Search Folders | | John Smith (Housto Thu 16/ Document Transmittal | 01/2020 10:13 PM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>KM-23607-2017-1 Doc Revision B f. jects/TRAINING501/Logos/HCC-Logo-4.</td><td></td><td>Houston Contracting</td></http:> | KM-23607-2017-1 Doc Revision B f. jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |
| | | Joe Fredericks (Hou Wed 15 Notification of: | /01/2020 11:42 AM Package Issue. Reason: Issued for Tender | Notification of Package Issue. Reaso | . HCC-000416 | Houston Contracting |
| DocsProjectDelivery | | Joe Fredericks (Hou Mon 13 Document Transmittal | /01/2020 2:02 PM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>High Voltage jects/TRAINING501/Logos/HCC-Logo-4.</td><td></td><td>Houston Contracting</td></http:> | High Voltage jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |
| Personal | | Joe Fredericks (Hou Mon 16 Document Transmittal | /12/2019 12:03 PM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>High Voltage jects/TRAINING501/Logos/HCC-Logo-4.</td><td></td><td>Houston Contracting</td></http:> | High Voltage jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |
| ✓ TeamBinder Deleted Items | | Joe Fredericks (Hou Wed 20 Notification of: | /11/2019 1:07 PM Package Issue. Reason: Issued for Inform | Notification of Package Issue. Reaso ation | . HCC-000406 | Houston Contracting |
| rRAINING501 Deleted | | John Smith (Housto Fri 18/1) Document Transmittal | 0/2019 1:15 PM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>Structural Docuemnts jects/TRAINING501/Logos/HCC-Logo-4.</td><td></td><td>Houston Contracting</td></http:> | Structural Docuemnts jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |
| Drafts | [17] | Frank Jacobs (Engin Wed 2/ Document Transmittal | 10/2019 10:01 AM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>PDF files Merge jects/TRAINING501/Logos/EPS-Logo-1.0</td><td></td><td>Engineering Project Services</td></http:> | PDF files Merge jects/TRAINING501/Logos/EPS-Logo-1.0 | | Engineering Project Services |
| Inbox 14 Offline Drafts | 486 | Joe Fredericks (Hou Thu 19/ Document Transmittal | 09/2019 11:59 AM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>Document Testing jects/TRAINING501/Logos/HCC-Logo-4.</td><td></td><td>Houston Contracting</td></http:> | Document Testing jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |
| Sent Items | | I Frank Jacobs (Engin Tue 13/ | | test | | Engineering Project Services |
| ✓ Transmittals | | Document Transmittal | <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>jects/TRAINING501/Logos/EPS-Logo-1.</td><td>SIF></td><td></td></http:> | jects/TRAINING501/Logos/EPS-Logo-1. | SIF> | |
| Drafts | [16] | Frank Jacobs (Engin Tue 13/ Document Transmittal | 08/2019 9:29 AM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>test ierts/TRAINING501/Logos/EPS-Logo-1 (</td><td></td><td>Engineering Project Services</td></http:> | test ierts/TRAINING501/Logos/EPS-Logo-1 (| | Engineering Project Services |
| Inbox | | | | | | United Contraction |
| Sent Items | | Joe Fredericks (Hou Fri 2/08, Document Transmittal | /2019 1:54 PM <http: bin="" p="" proj<="" wdexpress="" www.teambinder.com=""></http:> | Civil Documents jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |
| Unregistered Mail Search Folders | | Joe Fredericks (Hou Fri 14/0 Document Transmittal | 6/2019 1:14 PM <http: bin="" pro<="" td="" wdexpress="" www.teambinder.com=""><td>Transmittal this!! jects/TRAINING501/Logos/HCC-Logo-4.</td><td></td><td>Houston Contracting</td></http:> | Transmittal this!! jects/TRAINING501/Logos/HCC-Logo-4. | | Houston Contracting |

For more information, see the link below.

6.1 CREATING NEW INEIGHT DOCUMENT TRANSMITTALS

1. From the InEight Document tab click **New Item** or **InEight Document New Item** from the **Home** tab.

2. Select the Project, choose **Transmittal** then select the Transmittal type from the drop-down list. This opens the Transmittal compose screen as you would see it in InEight Document.

| File Home Se | end / Receive | Vie | w Add-ins Help TeamBinder |
|------------------|---------------|--------|-------------------------------------|
| 🖄 New Item 🖌 | 🎖 Change Mai | l Stat | tus 🗋 Open Item in TeamBinder 📿 🤅 |
| TRAINING501 > | 🗋 Mail | > | Upread |
| Inbox | Transmitta | al > | Latest Document Transmittal |
| Sent Items | | ~ 0 | Latest Revised Document Transmittal |
| Deleted Items | | | 🗋 Review Document Transmittal |
| > Search Folders | | | Superseded Document Transmittal |
| > Groups | | | Rejected Document Transmittal |

- 3. To add recipient(s), select the **"To"** and **"CC"** buttons or begin typing contacts names and select from suggested users.
- 4. Create and send Transmittal in the same way as if you were logged into InEight Document and using the normal Transmittal screen.

 Recipient contact details are from the InEight Document Project Address Book and not from the Outlook Address Book.

- Use the **Open Item in InEight Document** button to open a transmittal from within Outlook with all the formatting and fields you would see if you were in InEight Document.
- To manage the Synchronization of Transmittal information between InEight Document and Outlook use the Enable Transmittals option from within the Manage Projects window. A subfolder for Transmittals is created under the Project folder in Outlook.

NOTE

CHAPTER 7 – REMOVING A PROJECT

1. Select Manage Projects from the InEight Document tab.

| File Home Send / Receive View | |
|-----------------------------------|---|
| 🖂 New Item 🖌 📝 Change Mail Status | 🗎 Open Item in TeamBinder 🖓 Send/Receive All 📰 Show Progress 🛱 Manage Projects 🕸 Settings (i) About |

- 2. Tick the **check box** for the project you wish to remove.
- 3. Click **Remove** then **OK**.

| Synchronise From | Get Al | Enable Transmittals | Display Name | Server Name | Project No. | Project Title | Add |
|------------------|--------|---------------------|--------------|---------------------------------|-------------|---------------|---------|
| 30/03/2017 | | 1 | TRAINING502 | www.teambinder.com | TRAINING502 | Training502 P | Change |
| | | | | | | | Remov |
| | | | | | | (| Setting |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | OK |

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CHAPTER 8 – SETTINGS

The InEight Document Outlook Integration settings window allows the user to modify settings on a personal basis.

See setting options below:

8.1 PROXY SETTINGS

This tab will allow you to set the proxy server settings to be used by InEight Document Outlook Integration when connecting to the InEight Document servers.

- 1. Click Settings.
- 2. Update Proxy settings (between the user's account and the internet) as required from the **Proxy** tab.

| File Home Send / Receive View Add-ins Help TeamBind | | Show Progress 입법 M. | anage Projects 🐼 Settings (i) About |
|---|----|---------------------|-------------------------------------|
| Settings | | × | |
| Proxy General Update Offline Drafts URL: | |] | |
| Domain: User Name: Password: | |] | |
| | | | |
| | OK | Cancel | |

8.2 GENERAL SETTINGS

The following settings can be adjusted from this tab:

- Disable Expect: 100-continue headers Enable this option to fix connection issues between InEight Document Outlook Integration and the InEight Document server caused by the 100expect-continue and keep-alive headers.
- 2. Mark as Unread all downloaded mails All downloaded unregistered mails will be marked as unread when enabled.
- 3. Sync Changes to downloaded mails if this is not enabled the status changes within InEight Document to previously downloaded mails will not be updated in Outlook.
- 4. Sync Response required by date from InEight Document If ticked this will enable the "Response Required By" date in Outlook. (This is ticked by default).

- 5. **Do not download mail or transmittal attachments** Does not download any attachments in Outlook.
- 6. Download mail or transmittal attachments equal or less than (KB) Will only download attachments equal or less than a specified size.
- 7. Use Default Browser to Open InEight Document Items When setting is enabled, and an internet connection is available, items opened in InEight Document (by using "Open in InEight Document" button) will be opened as a new window/tab in the user's default browser.

| Settings | × | | | |
|---|---|--|--|--|
| Proxy General Update Offline Drafts | | | | |
| Disable Expect: 100-continue headers | | | | |
| Mark as unread all downloaded unregistered emails | | | | |
| Sync changes to downloaded mails and transmittals | | | | |
| Sync response required by date from TeamBinder | | | | |
| Do not download mail or transmittal attachments | | | | |
| Download mail or transmittal attachments equal or less than(KB) | | | | |
| 10240 🜩 | | | | |
| Use Default Browser to Open TeamBinder Items | | | | |
| ✓ Open processed unregistered mail | | | | |
| OK Cancel | | | | |

8.3 UPDATE SETTINGS

Settings in this tab control the frequency that Outlook Integration checks for updates. This tab gives you the following update options:

- 1. Never does not allow you to update Outlook when it becomes available.
- 2. Each time Outlook is started will update every time there is a new Outlook version available.

| Settings | | × |
|--------------------------|---|--------|
| Proxy General Update Off | ine Drafts | |
| Check for updates: | Each time Outlook is started Never Each time Outlook is started | |
| | ОК | Cancel |

8.4 OFFLINE DRAFTS

This tab provides the following options for inserting a signature while drafting mail offline:

- 1. Include no signature.
- 2. Use the default Outlook signature.

3. Use an InEight Document signature associated with the InEight Document user.

| Settings | | × |
|-----------|--|-----|
| Proxy Ger | neral Update Offline Drafts | |
| | Signature for offline composed mails No signature Default Outlook signature TeamBinder signature | |
| | OK Cano | el: |