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**DOCUMENT  
ESSENTIALS USER  
GUIDE**

**DOCUMENT MANAGEMENT**

**INEIGHT** 

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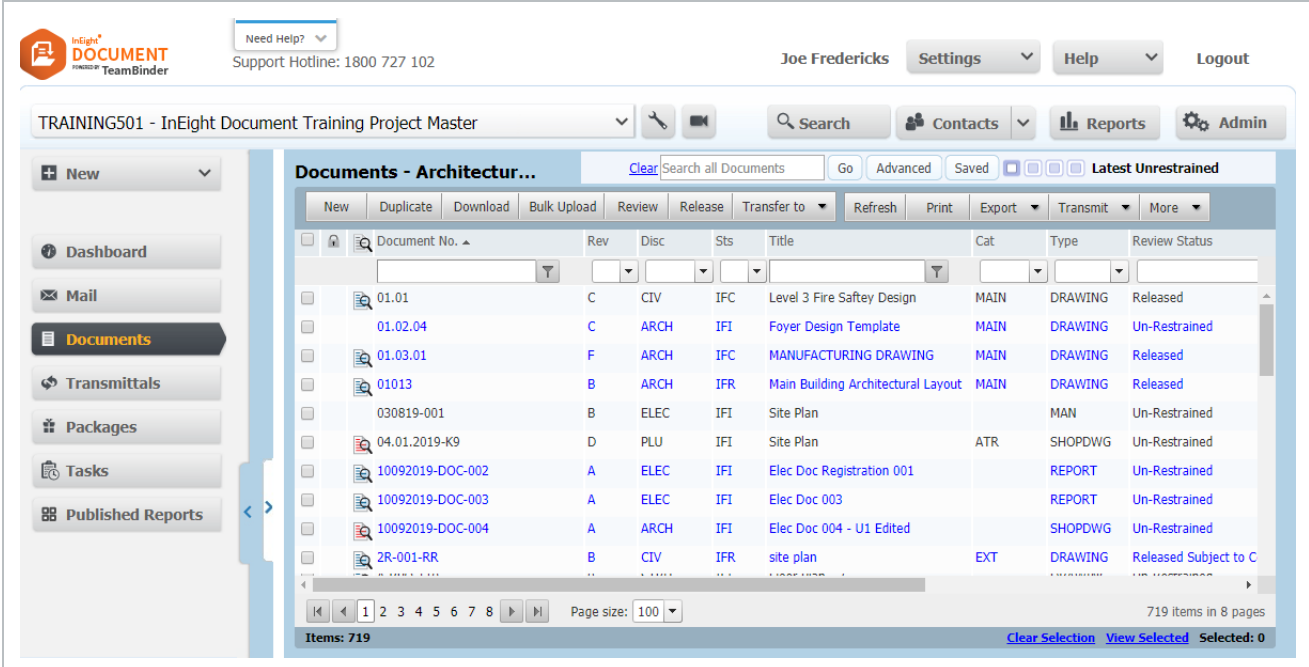
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# CHAPTER 1 – DOCUMENT ESSENTIALS

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## 1.1 DOCUMENT REGISTER

The InEight Document register contains all project documents that have been uploaded by companies on the project. Only the latest released revisions of documents are visible by default.



The screenshot shows the InEight Document Register interface for a project named 'TRAINING501 - InEight Document Training Project Master'. The interface includes a navigation sidebar on the left with options like 'New', 'Dashboard', 'Mail', 'Documents', 'Transmittals', 'Packages', 'Tasks', and 'Published Reports'. The main area displays a table of documents with columns for Document No., Rev, Disc, Sts, Title, Cat, Type, and Review Status. The table lists several documents, including 'Level 3 Fire Saftey Design', 'Foyer Design Template', 'MANUFACTURING DRAWING', 'Main Building Architectural Layout', 'Site Plan', and 'Elec Doc Registration 001'. The interface also features a search bar, a 'Need Help?' dropdown, and user information for 'Joe Fredericks'.

Document No.	Rev	Disc	Sts	Title	Cat	Type	Review Status
01.01	C	CIV	IFC	Level 3 Fire Saftey Design	MAIN	DRAWING	Released
01.02.04	C	ARCH	IFI	Foyer Design Template	MAIN	DRAWING	Un-Restrained
01.03.01	F	ARCH	IFC	MANUFACTURING DRAWING	MAIN	DRAWING	Released
01013	B	ARCH	IFR	Main Building Architectural Layout	MAIN	DRAWING	Released
030819-001	B	ELEC	IFI	Site Plan		MAN	Un-Restrained
04.01.2019-K9	D	PLU	IFI	Site Plan	ATR	SHOPDWG	Un-Restrained
10092019-DOC-002	A	ELEC	IFI	Elec Doc Registration 001		REPORT	Un-Restrained
10092019-DOC-003	A	ELEC	IFI	Elec Doc 003		REPORT	Un-Restrained
10092019-DOC-004	A	ARCH	IFI	Elec Doc 004 - U1 Edited		SHOPDWG	Un-Restrained
2R-001-RR	B	CIV	IFR	site plan	EXT	DRAWING	Released Subject to C

Some of the standard document fields are described in more detail below.

Field	Description
Document Number	The unique identifier for a document.
Rev (Revision)	The revision of the document, e.g. A, B, C, 0, 1, 2.
Sts (Status)	The status of the document in its life cycle. Controls whether the document is to be reviewed (restrained) or released immediately (unrestrained).
Title	The description of the document.
Discipline	Used to group documents by discipline e.g. structural, electrical or mechanical.
Category	A secondary way of grouping documents.
Type	Used to group documents by type e.g. Drawing, procedure or manual.
Review Status	The status of the review process e.g. Awaiting Review, Released or Rejected.
Document Formats	The available file formats of the document e.g. DWG, DOC, PDF or Other.
Comments icon	Indicates if there are review comments associated with the document.
On-line viewer	Indicates that the document can be viewed online without download (e.g. view AutoCAD drawings without the AutoCAD application installed.) If redline comments exist this icon will be red.

**NOTE**

- To share the current view of the document register with an Advanced search active, under **More** select **Generate Hyperlink for the current register**. Then choose **Copy to Clipboard** and paste as required. Note that results filtered using quick search or column filters will not be included in this link.
- To export the Document Register to an MS Excel file, click **Export, Excel** then choose between **All Items** and **Selected Items**. The export process will export all or selected records for the currently applied filter with the same columns as currently displayed in the register.
- To select documents in the register, simply tick the select boxes in the left-hand column of the register.
- Use the **View Selected** option below the register to view only selected documents.
- **Latest Transmittal No. field** – A new Latest Transmittal No. field is available in the Document register. This field provides visibility into the latest transmittal the Document has been sent on. It only shows items based on the access of the logged-in user.

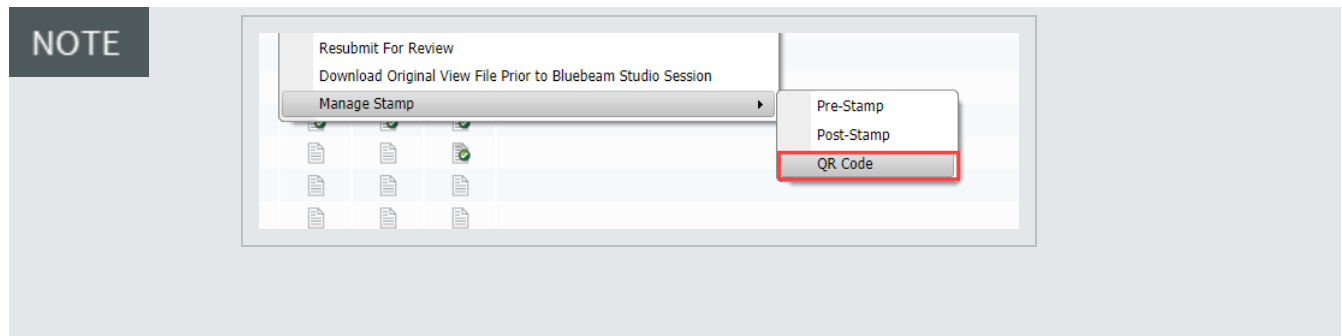
If the Latest Transmittal No. column is not visible, you can customize your view to select it to be visible.

You must have permission to transmittals to see the Latest Transmittal No column in the Documents register.

Document No. ▲	Latest Transmittal No.	Rev	Sts	Title
000000-TS-DOC-0002	<a href="#">TRAINING01-HCC-GHA-0157</a>	A	IFI	00000-TS-DOC-0002-TITLE
000000-TS-DOC-00021	<a href="#">TRAINING01-HCC-GHA-0157</a>	A	IFI	00000-TS-DOC-0002-TITLE
000000-TS-DOC-0003	<a href="#">TRAINING01-HCC-GHA-0200</a>	B	IFI	00000-TS-DOC-0003-TITLE
000000-TS-DOC-0004	<a href="#">TRAINING01-DES0247</a>	B	IFI	00000-TS-DOC-0004-TITLE
000000-TS-DOC-0005	<a href="#">TRAINING01-HCC-GHA-0157</a>	A	IFI	00000-TS-DOC-0005-TITLE
000000-TS-DOC-0006		A	IFI	00000-TS-DOC-0006-TITLE
000000-TS-DOC-0007	<a href="#">TRAINING01-HCC-GHA-0157</a>	J	IFI	00000-TS-DOC-0007-TITLE123

- **Manage QR codes** – An option has been implemented to manually manage the QR stamp for Documents from the register.

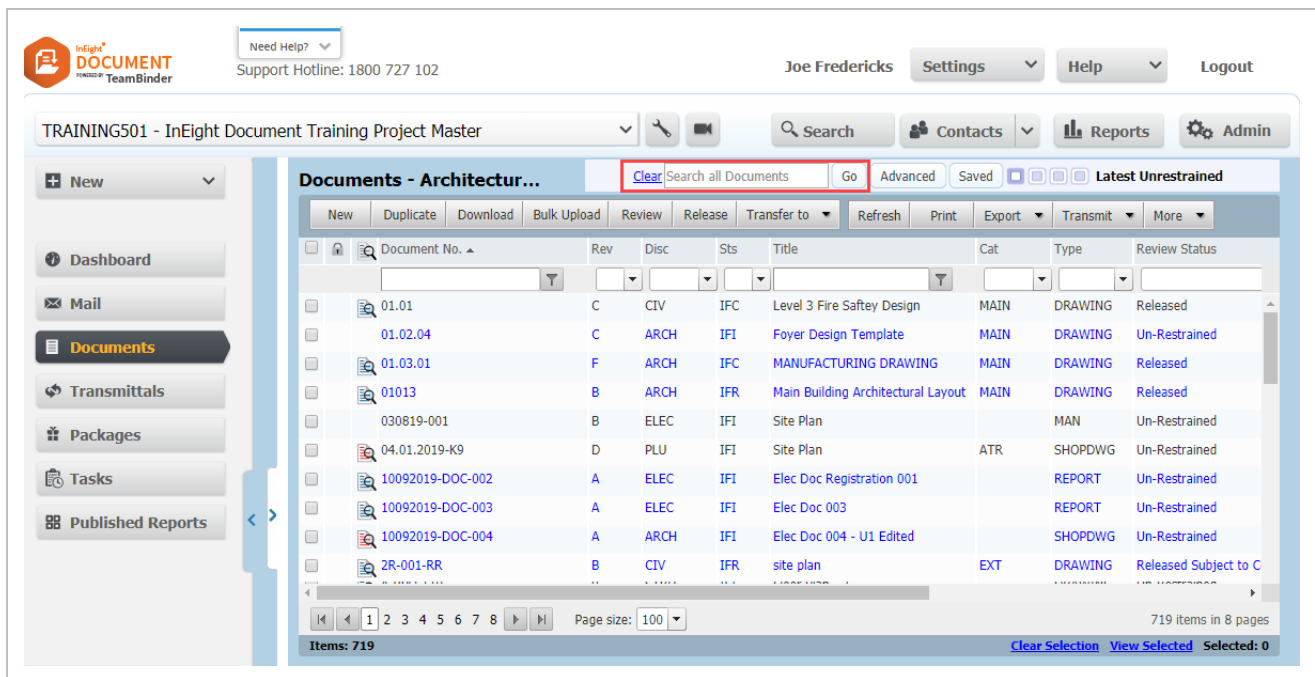
You can manually add a QR code to a document. Select a document, and then click **More**. In the drop-down list, select **Manage Stamp > QR Code**. This option is only available for projects that have QR codes enabled. Please contact your project delivery consultant to enable this feature.



## 1.2 LOCATING DOCUMENTS

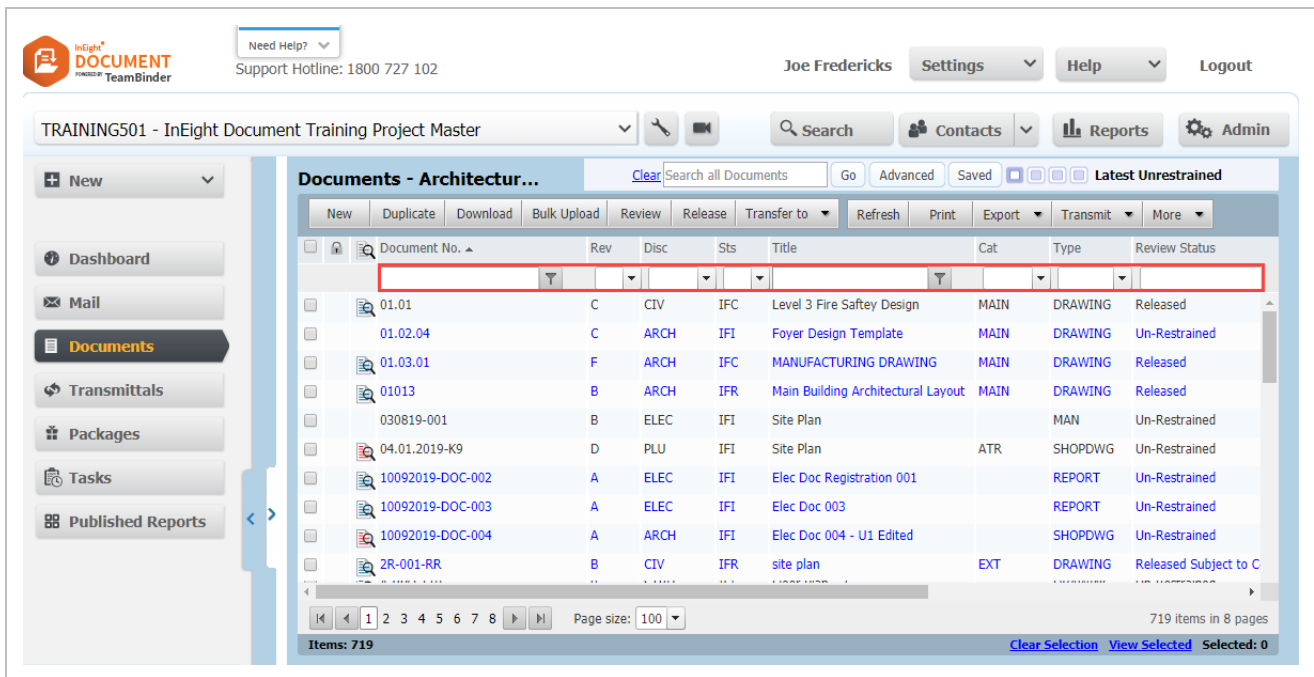
There are three basic ways for finding documents in the document register. To remove any applied filters, click the **Clear** option to the left of the quick search field.


**Simple Search** – In the Search box above the register enter a string of text in the search box and click **Go** or press Enter. The register will display only documents that have the string of text somewhere in their metadata (e.g. in the Document Number or Title of the Document).



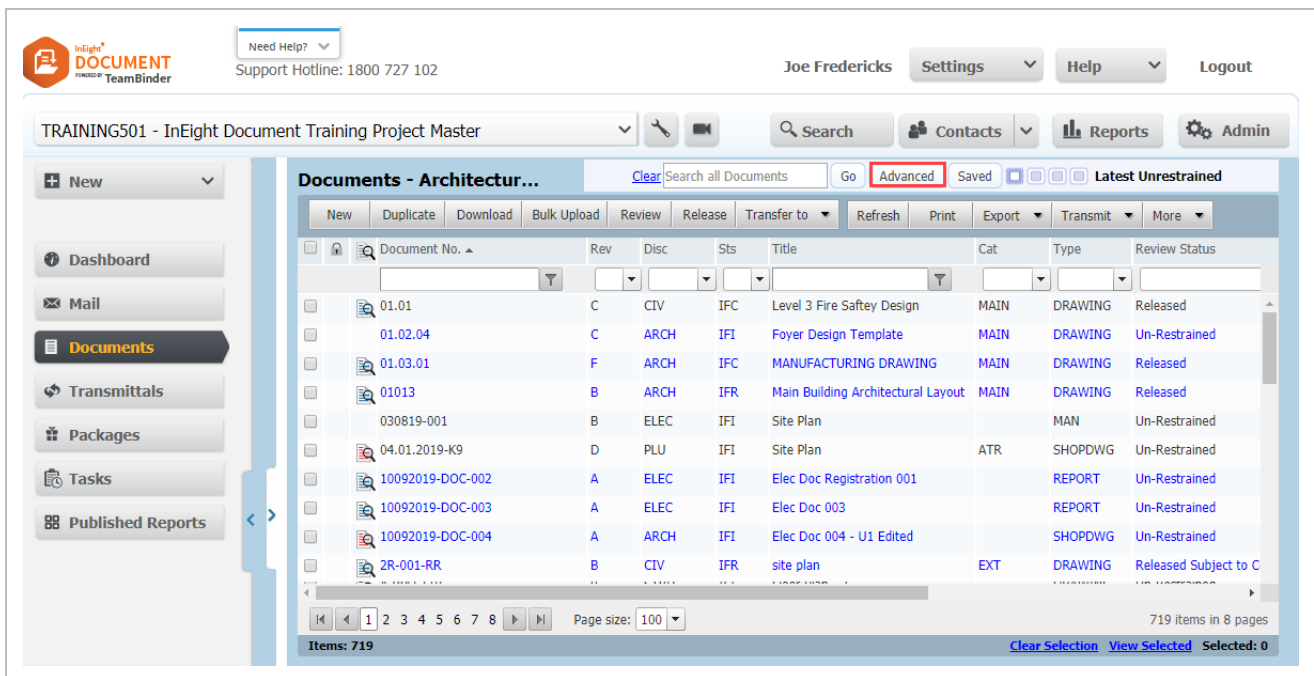
**Filter Criteria** – enter the search value in the relevant column header boxes and press Tab or Enter. The default filter criteria is “Contains” in the search value.





Other options such as Starts with, Equal to, etc. are also available by clicking the adjacent Filter  button.

**Advanced Document search** – accessed using the **Advanced** button above the Document Register.



The Advanced Document Search options are outlined in the table below.

Option	Explanation
Register View:	<p>Select from the following options:</p> <p>Latest Unrestrained The latest revision of released (after going through a review workflow) or unrestrained (not requiring review) documents.</p> <p>Latest Regardless of whether the document is currently restrained (going through a workflow), unrestrained or released the latest revision of document will show.</p> <p>All superseded revisions Shows only superseded revisions of documents.</p> <p>All All revisions of all documents regardless of whether they are restrained, unrestrained, or released.</p> <p>Then choose between:</p> <p>Documents that I can download. This means documents you have access to that have been released or are unrestrained and/or documents that are restrained where you are a reviewer.</p> <p>Documents that my company has uploaded only documents that the company you belong to has uploaded.</p> <p>All If users within your company can only view documents to which they have access, the All option will be restricted to only showing these documents.</p>
Status:	Select a document Status (default is -ALL-).
Discipline:	Select a document Discipline (default is -ALL-).
Type:	Select a document Type (default is -ALL-).
Document No:	Enter part, or all of a Document Number, choose from the various comparison options such as “Contains”, “Begins with” etc.
Title:	Enter a text string to search for documents via their title.
Category:	Select a document Category (default is -ALL-).
Sort by:	Includes all generic and custom fields. Choose between Ascending and Descending order. Up to three sort fields can be combined using the <b>More</b> button.

Option	Explanation
More Search Options:	The <b>More Search</b> options link allows you to create your own search conditions using most of the fields in the document register, several comparison conditions and open text fields.

- NOTE**
- To save advanced search settings, click **Save** and enter a Title for the saved settings. Use the **Manage** button to load a previously saved search or the **Saved** button at the top of the mail registers.
  - Wild cards** can be used to enhance the search process. Use **?** to search for any character. For example, searching for Document Number A?1 will return A01, A11, A12 etc. Use **\*** to match any number of characters. For example Structur\* will return Structural, Structures, Structuring etc.
  - Registers can be customized from **More** menu to view additional fields.

## 1.3 VIEWING DOCUMENTS (TEAMVIEW)

### [Using the Online Viewer Video](#)

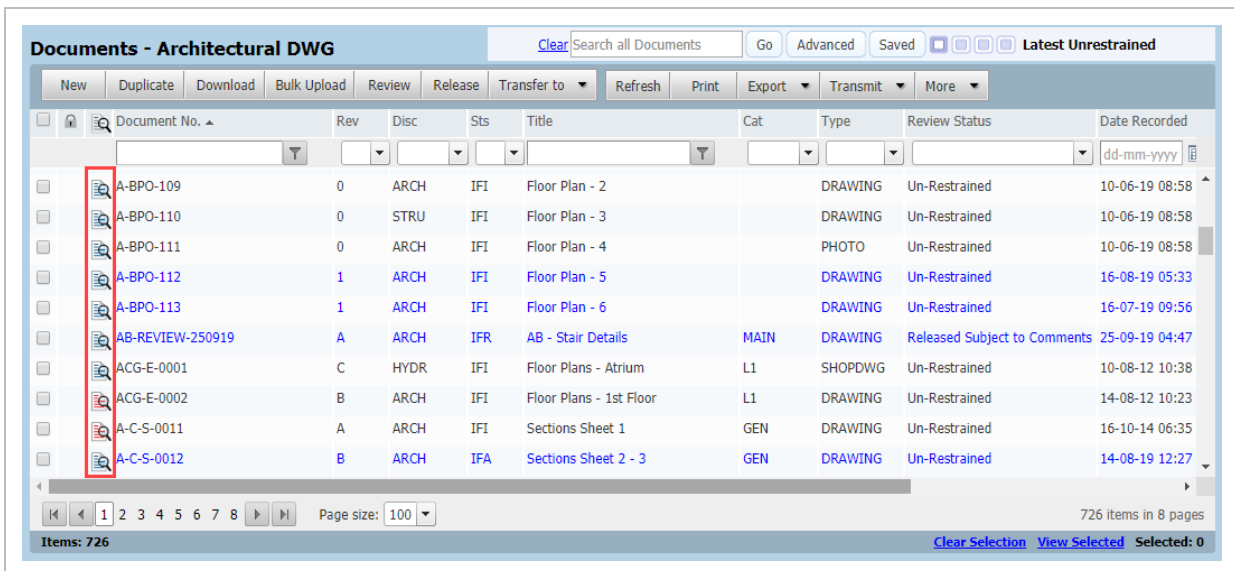
### [Using the HTML 5 Viewer Video](#)

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

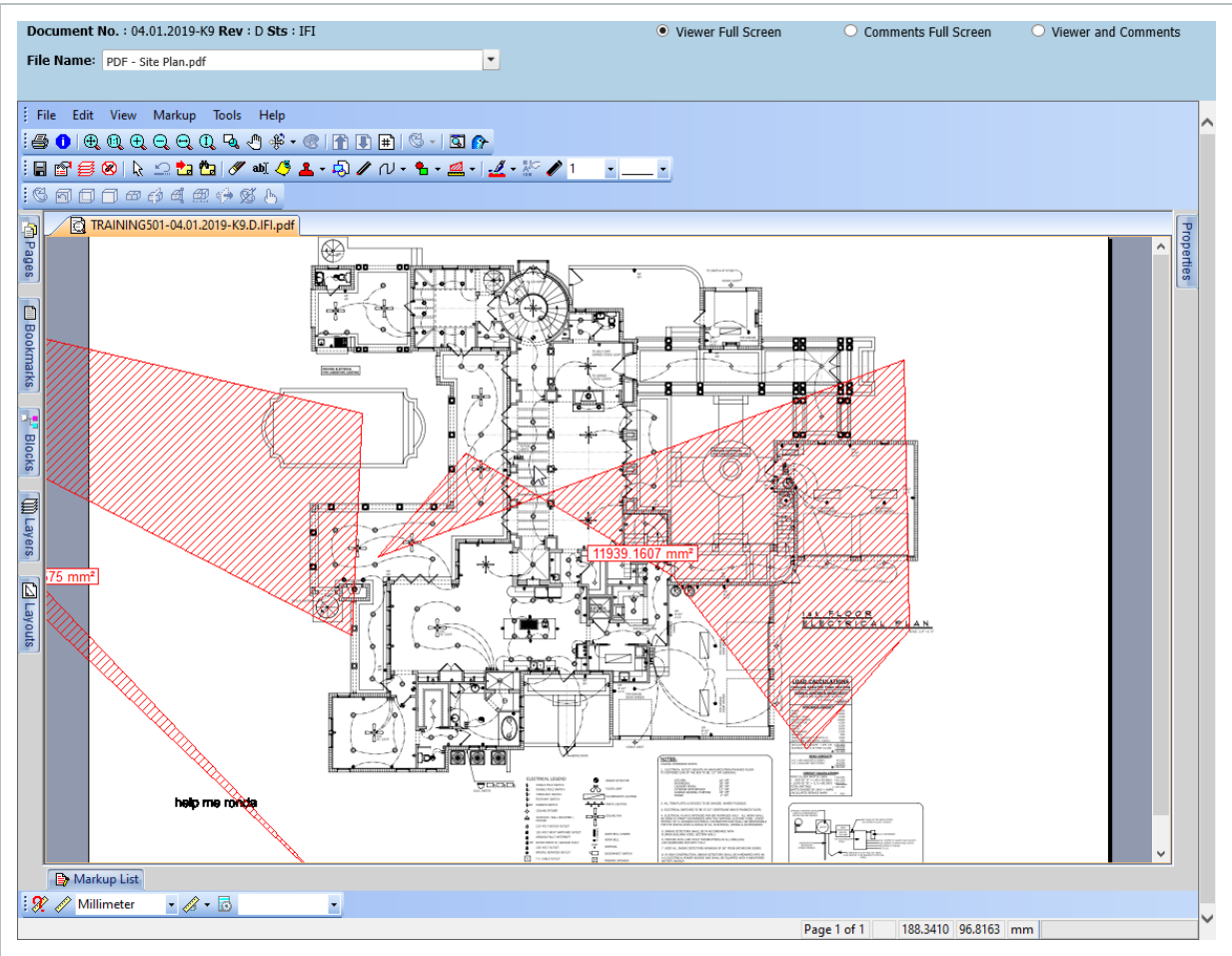
There are two versions of TeamView, one based on Active X technology and the second based on HTML5. The version of TeamView suitable for your browser will be loaded automatically. The icons and their explanations below are based on the Active X version of TeamView.

#### To view a document:

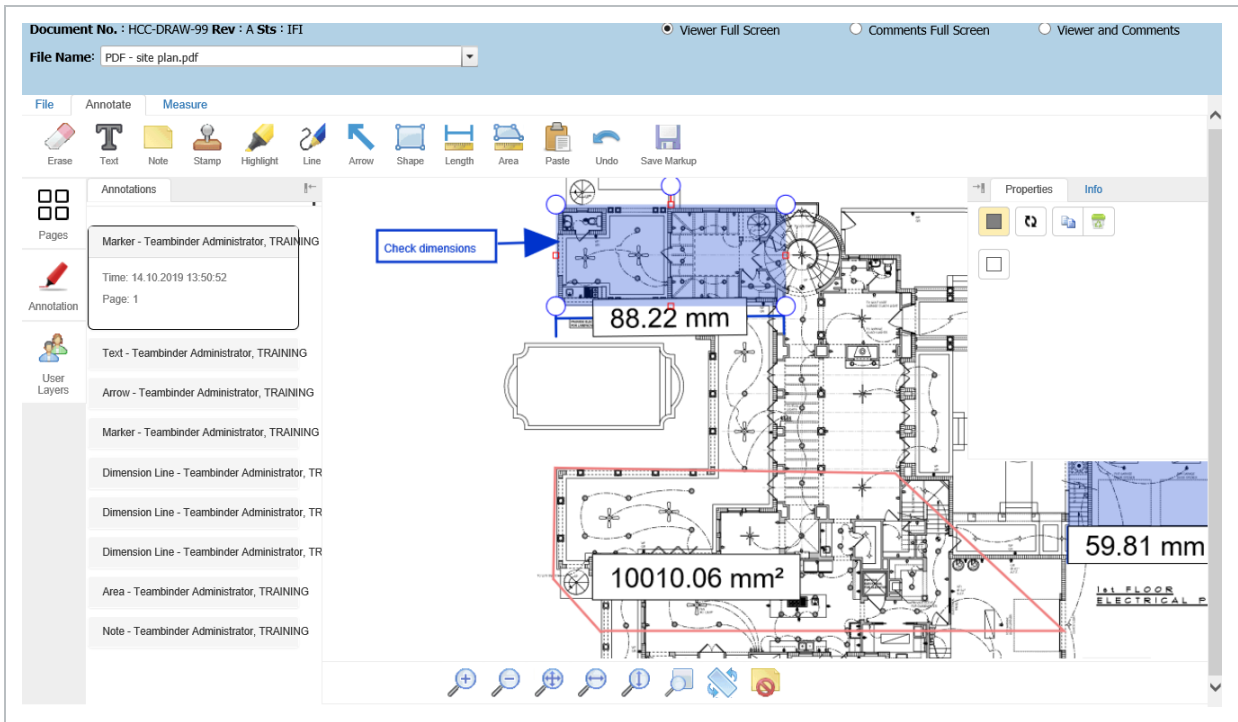
1. Locate the document in the Document Register.
2. Click the **View** icon.












3. The Document image will be displayed in a new browser window, rendered by TeamView. The Active X interface is as shown here:







This image below shows the HTML 5 (Chrome) interface.



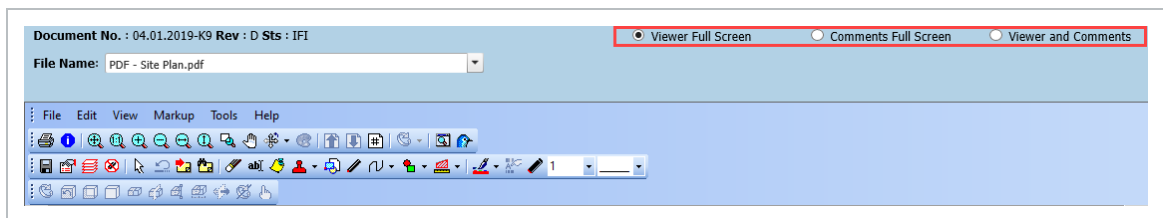
4. The icons on the horizontal toolbar have the following meanings:

Icon	Purpose
	<b>Print:</b> Used to print a copy of the document/drawing. Options include: the page or portions of the page to print; the print scale; margins and number of copies; application of watermarks and headers/footers, and the selection of a pen table if available.
	<b>Vector Control:</b> Active only for Vector format Documents
	<b>Rotation:</b> Used to rotate the image by 0, 90, 180 or 270 degrees.
	<b>Zoom window:</b> Click and then drag a window on the image to zoom into.
	<b>Zoom options:</b> Zoom 1:1 (zoom to scale); Zoom All (show complete image on screen); Zoom Width (show full width), Zoom Height (show full height).
	<b>Increase Zoom:</b> Click to increase the zoom.
	<b>Decrease Zoom:</b> Click to decrease the zoom.
	<b>Pan Hand:</b> Click and drag in the direction required to move around a large drawing.
	<b>Birds Eye View:</b> Click to load a birds eye view window. As you zoom in and move

Icon	Purpose
	around a drawing the birds eye view enables you to keep track of where you are. It is also possible to navigate the drawing by using the small red line outline within the Birds Eye view.
	<b>Measure:</b> Use the down arrow to measure a straight line distance on the drawing. Click the ruler to define an area by clicking on a start point, drag to the next point, click and drag to further points and then right click to get the measurement statistics which include: Angles, distances of each straight line and the area.
	<b>Page Down:</b> Enabled on a multi-page document to move between pages.
	<b>Page Up:</b> Enabled on a multi-page document to move between pages.
	<b>Select the Page to View</b>

5. Use the three options at the top of the screen to switch between:

- **Viewer Full Screen** – displays full screen (default).
- **Comments Full Screen** – loads the comments screen to make text-based comments.
- **Viewer and Comments** – the comments screen will be in the lower half of the screen and the viewing tool at the top.



See also:

[Reviewing Documents Video](#)

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# CHAPTER 2 – DOWNLOADING DOCUMENTS

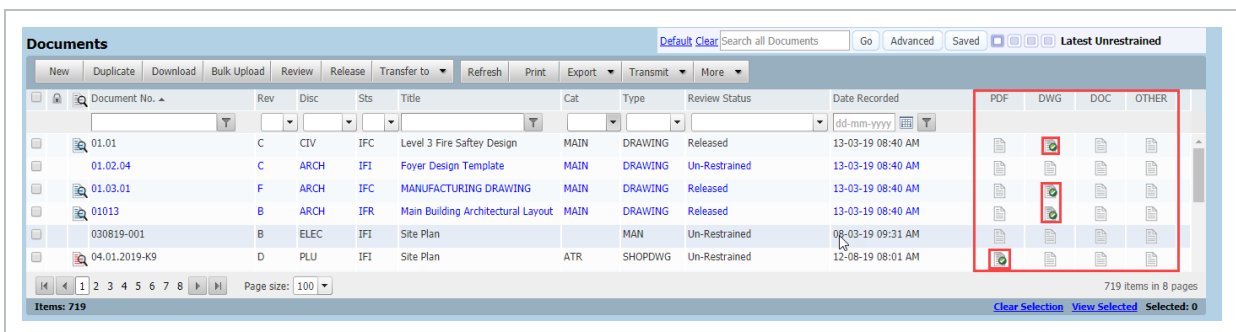
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## 2.1 DOWNLOADING A DOCUMENT

Users can download documents they have access to directly from the register. The Document format columns indicate which formats exist and are available for download. A tick indicates the user has access to the format and can download it. An “x” indicates the format exists, but the user does not have access.

To download a document:

1. From the Document Register locate the document.
2. Click the **Download** icon of the format you want to download.



3. **Agree** to the conditions of any download disclaimer that may appear.
4. **Save** the downloaded document to a location on your Device.

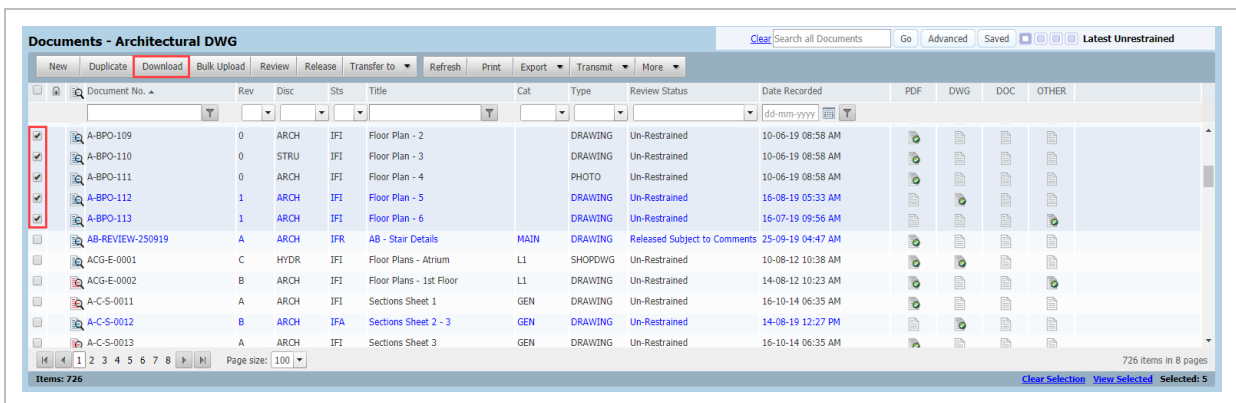
**NOTE**

- All documents with associated view files that the user has access to (i.e. can download) but has not downloaded, are displayed in blue.
- Files associated with a document can also be downloaded via the Document Details window.

## 2.2 DOWNLOADING DOCUMENTS IN BULK

Download documents in bulk from the document register using these steps.

1. From the Document Register locate and select the documents using the tick box in the left hand column of the register.



2. Click **Download** on the toolbar. The cumulative file size of the documents selected for download is displayed.



3. Click **File Type** in the “Group By” options to quickly select the document formats to download by format type.
4. To include a meta data spreadsheet select the option.
5. Once the documents and formats are confirmed, click **Download**.

**NOTE** The documents being downloaded will be zipped on the InEight Document server prior to download.

### 2.2.1 Download more than 100 documents

A new bulk download option lets you download more than the previous limit of 100 documents.

The new Download via Queue option in the Select files to download dialog box lets you download documents by creating a zip file and adding them to a queue. This method can accommodate more than 100 files at a time. The Direct download option is not available when you have selected more than 100 files. Fields that specify the title and maximum zip size of the download queue also have been added to the Select files dialog box. You can also specify whether to require a password to the zip file and to include the document metadata spreadsheet in the download.

A new option on the **More** menu, **Manage download queue**, opens the Manage download queue page where you can see the download title, status, number of files and the documents. You can also download the documents from this page.

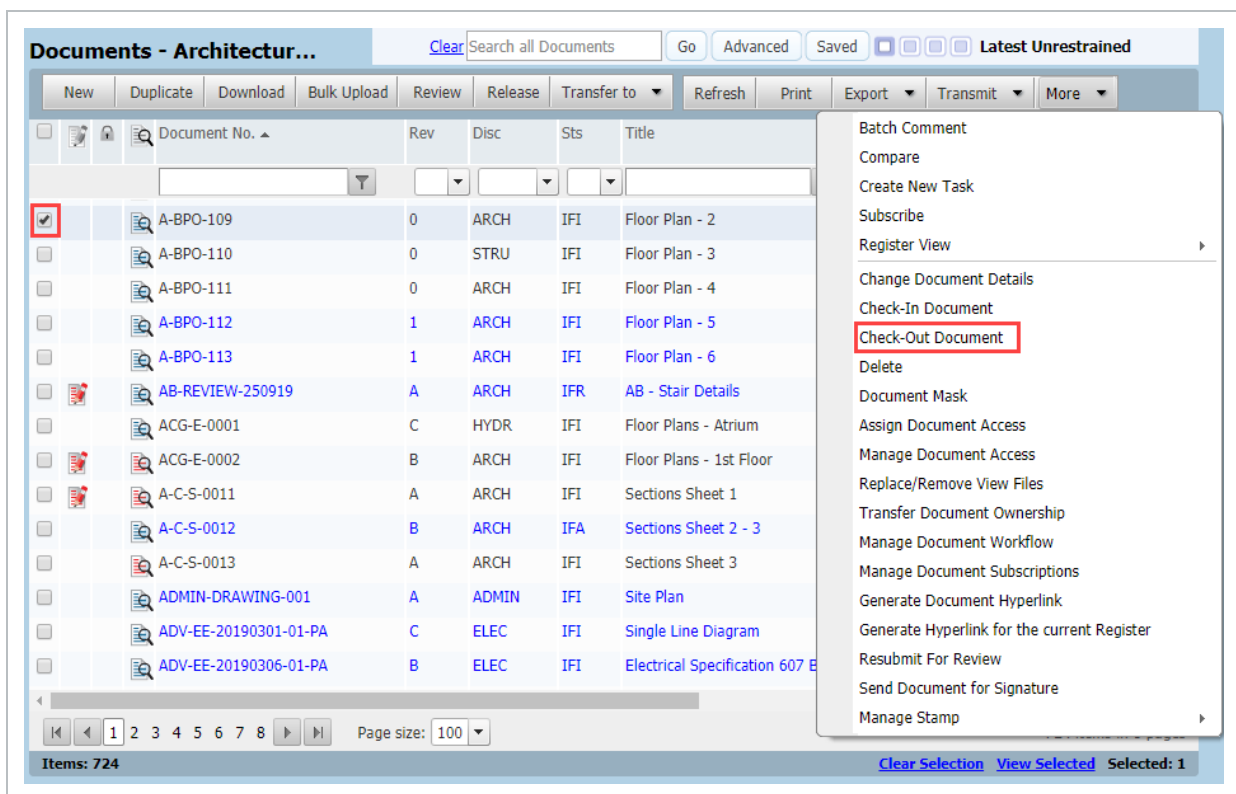
## 2.3 DOCUMENT CHECK-IN / CHECK-OUT

The InEight Document **Check-Out / Check-In** facility is used for various reasons. For instance, a document can be checked out to place it on hold temporarily if it has been released prematurely or accidentally, or to prevent other users from downloading the document while it is being updated.

Once any changes are completed, the document can be checked in again, restoring the download ability to other users.

To Check-Out a document:

1. From the **Document Register**, select the document to be checked out using the tick box.



2. Click **More** then select **Check-Out**.
3. Enter a **Reason** why you are checking out the document.

The following documents were selected to check out. Please note, only the documents to which you have access will be processed.

<input checked="" type="checkbox"/>	Document No.	Rev	Sts	Reason *	Remove user access	<input type="checkbox"/>	Apply same reason to selected documents
<input checked="" type="checkbox"/>	A-BPO-109	0	IFI		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

4. If User Access to the document is to be retained while the document is checked out, un-tick the **Remove User Access** box.
5. Click **OK**.
6. In the document details screen, you will see a note at the bottom of the form advising that the document has been checked out.
7. Click **Close** to return to the Document Register.

#### NOTE

- Documents can also be checked out individually from within the document details window using the **Check-Out Documents** option from the **More** menu.
- Documents that have been checked out are displayed in the document register with the padlock icon.
- When a document is **Checked Out**, the document cannot be downloaded by other users regardless of their access settings unless the “Remove User Access” box is unchecked.

To Check-In a document:

1. Follow the steps as for Checking Out a document but select **Check-In** and enter the reason for checking the document back in.

*Only the person who checked the document out or the Project Administrator can check a document back in.*

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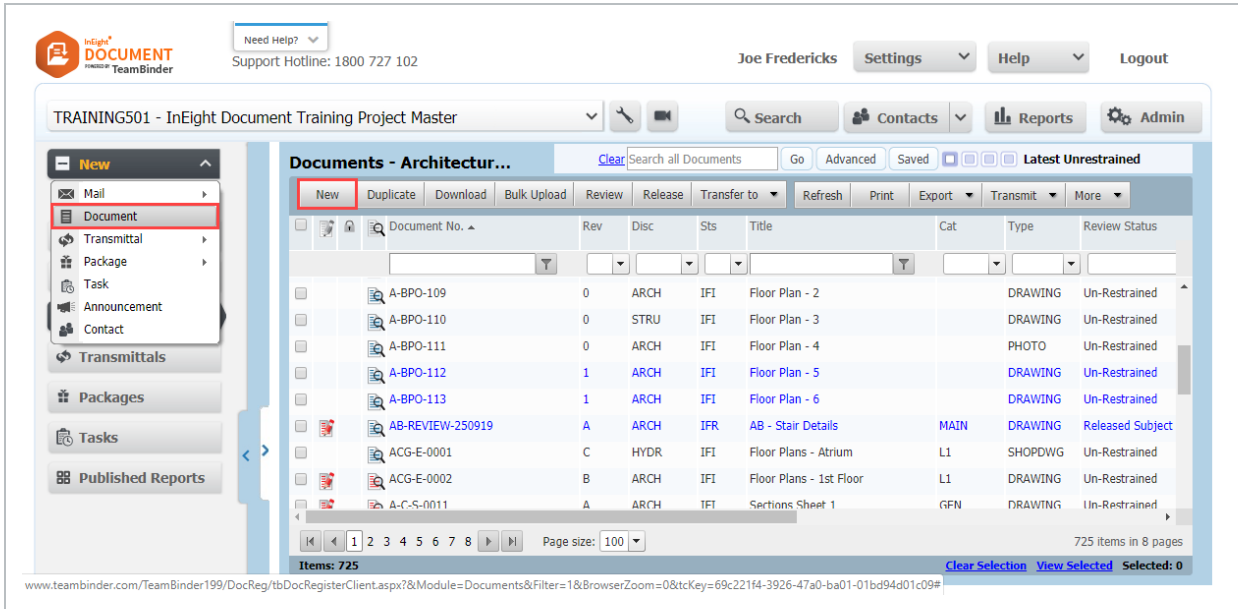
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### 3.1 UPLOADING NEW DOCUMENTS

To upload a new document (subject to appropriate access):

1. From the Document Register, click **New**.



2. Enter the required document details:

Field	Description
Document No*	This is the number of the Document.
Title*	The document Title.
Rev*	The document Revision.
Status*	The document Status.
Discipline*	The Discipline the document belongs to.
Category	The Category the document belongs to.
Type	The Type of document.
Sending Company	This field only appears if your company can upload documents on behalf of other companies. If this is the case, select the company that has sent the documents from the list.
Sender	This is the user who sent you the documents from within the Sending company above.
Revision	Any revision notes associated with the document.



---

Field	Description
Notes	
Remarks	Any remarks associated with the document by the up-loading person.
Reason	The reason for the upload as described by the up-loading person.

---

\* Mandatory fields

3. Select **Attach Files** to upload the format(s) of the View file(s) or drag and drop the file(s) onto the document details screen.

### New Document

Save Print Close More Attach Files

Document No.\*: AGP-001N ?

Rev\*: A - Revision A

Status\*: IFI - Issued for Information

Title\*: Site Plan

Discipline\*: CIV - Civil

Category: EXT - External Areas

Area : ALL - All Project Areas

Type\*: DRAWING - Drawing

Review Status:

From User: Joe Fredericks, Houston Contracting

Sender: -- Select a company -- -- Select a contact --

Date Recorded: Date Released:

Revision Notes:

Remarks:

Reason:

[1 View Files](#)

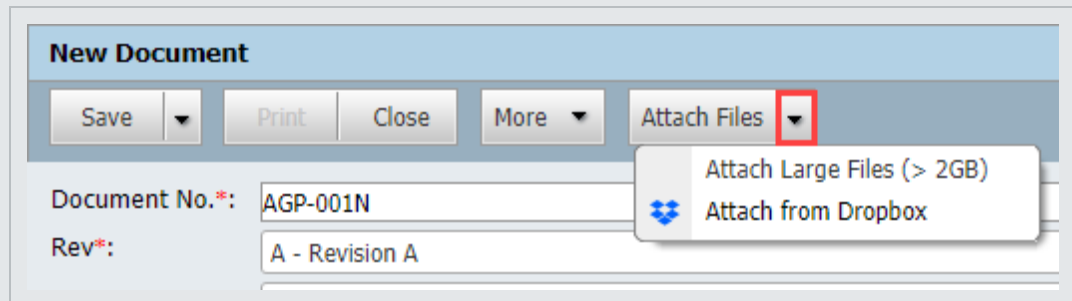
<input type="checkbox"/> File Name	Size			
<input type="checkbox"/> site plan.pdf	660 KB	<a href="#">Download</a>	View	<input type="checkbox"/>

[Download All](#) | [Download selected files](#)

4. Click **Save** then **Close**.

**NOTE**

- For very large files > 2GB, select the **Attach Large Files (>2GB)** option from **Attach Files**.



The screenshot shows a 'New Document' form with a header bar containing 'Save', 'Print', 'Close', 'More', and 'Attach Files' buttons. The 'Attach Files' button is highlighted with a red box, and its dropdown menu is open, showing two options: 'Attach Large Files (> 2GB)' and 'Attach from Dropbox'. Below the header bar, there are two input fields: 'Document No.\*:' with the value 'AGP-001N' and 'Rev\*:' with the value 'A - Revision A'.

- Use the **Duplicate** option from the document register to create a new document that has similar attributes. Edit the details as required, attach the View file and Save.
- Use the **Save & Transmit** option available from the **Save** button to launch the transmittal generation screen automatically after the document has been uploaded.

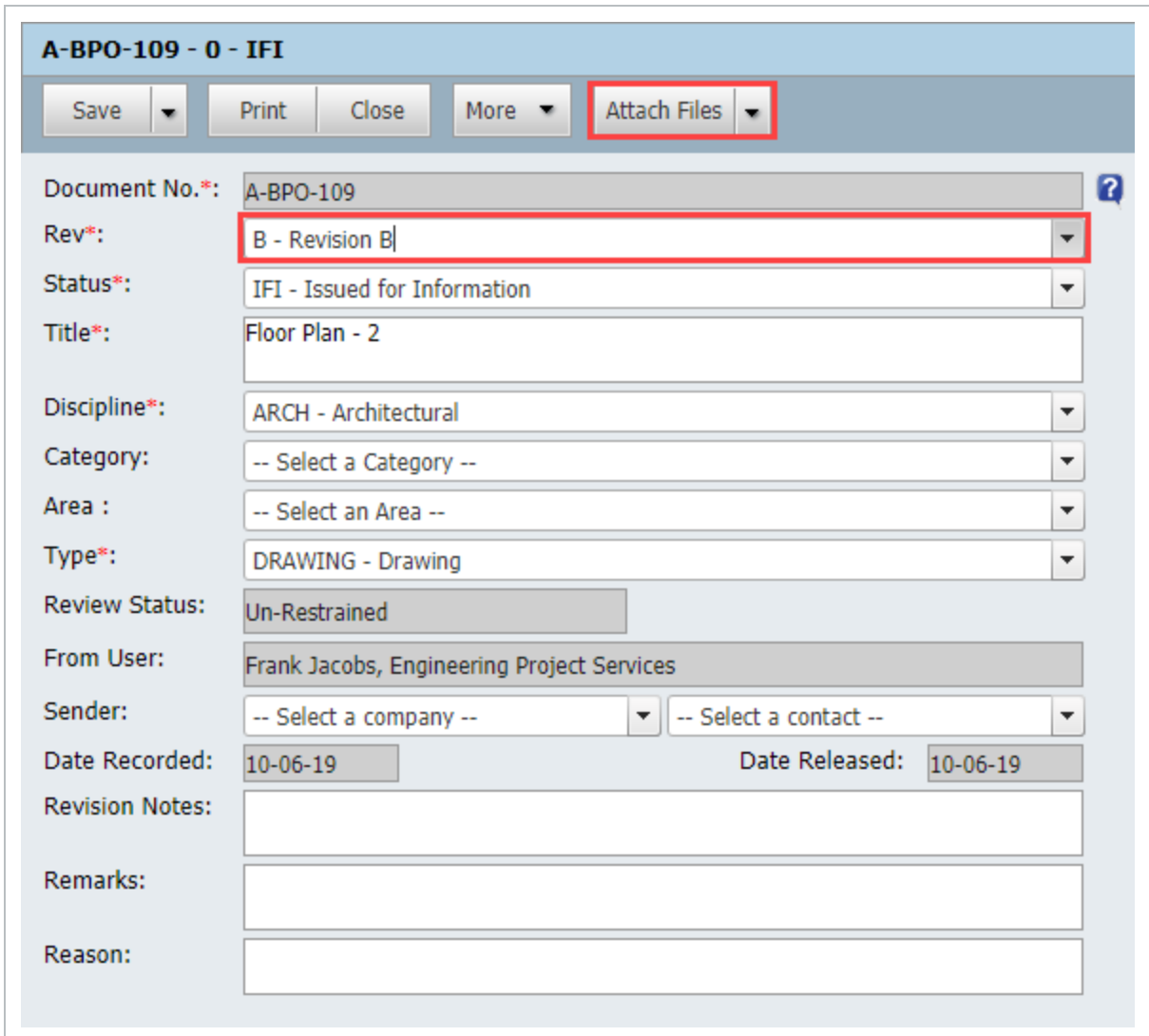
## 3.2 UPLOADING A REVISED DOCUMENT

Depending on access settings, the originator or another user from the originators company can upload a revision to an existing document.

To upload a revised document:

1. From the Document Register locate the Document to revise and double click to open the details screen.

2. Select the new revision from the drop down list.



**A-BPO-109 - 0 - IFI**

Save Print Close More Attach Files

Document No.\*: A-BPO-109 ?

Rev\*: B - Revision B

Status\*: IFI - Issued for Information

Title\*: Floor Plan - 2

Discipline\*: ARCH - Architectural

Category: -- Select a Category --

Area : -- Select an Area --

Type\*: DRAWING - Drawing

Review Status: Un-Restrained

From User: Frank Jacobs, Engineering Project Services

Sender: -- Select a company -- -- Select a contact --

Date Recorded: 10-06-19 Date Released: 10-06-19

Revision Notes:

Remarks:

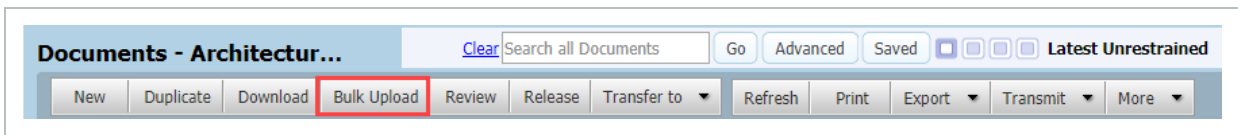
Reason:

3. Select **Attach Files** to add the formats of the new View file.
4. Click **Save** then **Close**.

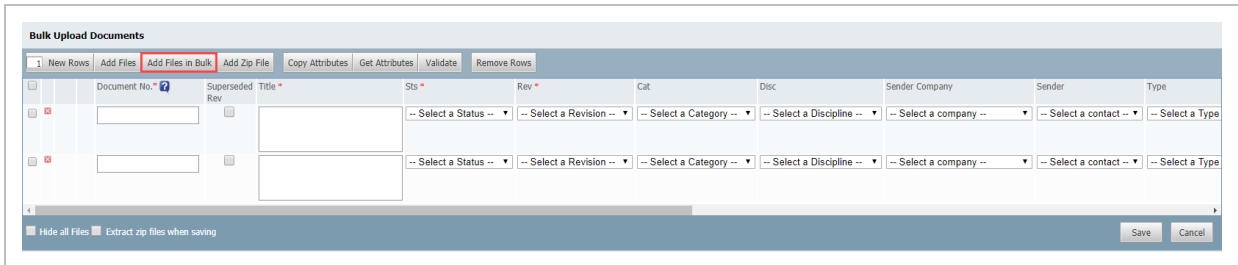
## 3.3 UPLOADING DOCUMENTS IN BULK

To upload multiple documents to InEight Document using Bulk Upload:

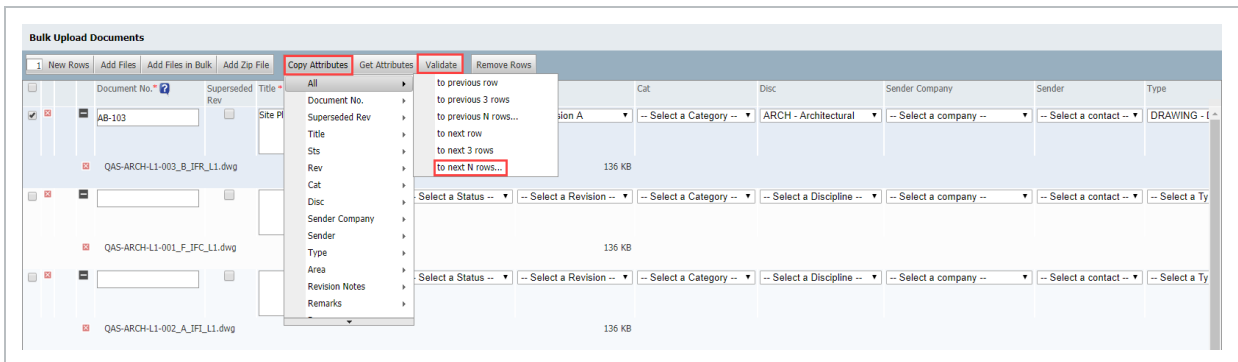
1. From the Document Register click **Bulk Upload**.



2. By default, 2 rows of empty document attributes are displayed.



3. Click **Add Files in Bulk** and select the view files you want to upload, click **Open**.
4. Each file is listed in a separate row.
5. Against the first document (first row), enter the Document details (Document No. Revision, Status etc.).
6. If the remaining documents being uploaded have similar attributes, select the first row then **Copy Attributes**.



7. Select the appropriate action from the list. **All** will copy all attributes or select a specific attribute to copy. Choose from the options to copy the attributes to previous or next rows. **Copy to next N rows** you will be prompted to enter the number of rows to copy to.
8. Edit the copied data against each row.
9. Click **Validate** to ensure the information entered meets the required business rules.
10. Click **Save** and **Yes** if you want to transmit the documents just uploaded or **No** if you want to save and return to the Document Register.

**NOTE**

- If documents are selected at the register prior to clicking **Bulk Upload**, the details of these documents will be displayed.
- You can enter all the document details first and then select the view files one by one. Use the **New Rows** button to add the required number of rows and enter the document details. Select a document and use **Add Files** to select a view file for each row.
- For view files contained in a zip file use **Add Zip file** rather than **Add Files in bulk** and select the required zip file. At the Bulk Upload screen click the **Save** button and the zip file will be uploaded, extracted and a separate row added to the screen for each document file in the zip file.
- When uploading revised Documents select the existing document revisions before clicking **Bulk Upload**. Choose the new Revision and click **Add Files** to upload the view file for each revised document.
- **Get Attributes** is used to retrieve document metadata from previously revisions already uploaded into InEight Document.
- The options at the bottom of the Bulk Upload screen have the following meanings:
  - o **Hide all files:** Compresses the display in the screen by hiding the rows displaying the view file names.
  - o **Extract zip files when saving:** When a zip file of multiple file formats is against a single entry for the document, this option will extract the individual files.

## 3.4 XL-UPLOAD

XL-Upload is InEight's proprietary system for uploading documents to InEight Document from within Microsoft Excel. XL-Upload has been designed to simplify and streamline the process of uploading large numbers of documents to the InEight Document system.

The XL-Upload application can be downloaded from [here](#) or **Help, Additional Applications** within InEight Document.

For more information about XL-Upload see: [Getting Started with XL Upload](#)

## 3.5 UPLOADING SUPERSEDED DOCUMENT REVISIONS

To upload a single superseded document:

1. Ensure this option is enabled by an Administrator.
2. From the Document Register locate the current version and double click to open the details screen.
3. Select a lower revision from the drop-down list.

**ACG-E-0001 - C - IFI**

Save Print Close More Attach Files

Document No.\*: ACG-E-0001

Rev\*: C - Revision C

Status\*: -- Select a Revision --

Title\*: -- No Revision

Discipline\*: A - Revision A

Category: B - Revision B

Area : C - Revision C

Type\*: D - Revision D

Review Status: E - Revision E

From User: F - Revision F

Sender: G - Revision G

Date Recorded: 10-08-12 Date Released: 10-08-12

Revision Notes:

Remarks:

Reason:

**2 View Files**

<input type="checkbox"/>	File Name	Size			
<input type="checkbox"/>	ACG-E-0001.C.dwg	184 KB	<a href="#">Download</a>	<a href="#">View</a>	<input type="checkbox"/>
<input type="checkbox"/>	ACG-E-0001.C.pdf	718 KB	<a href="#">Download</a>	<a href="#">View</a>	<input type="checkbox"/>

[Download All](#) | [Download selected files](#)

4. Select **Attach Files** to add the formats of the new View file.
5. Click **Save**. You will be advised that you are trying to upload a superseded revision, choose **Yes** to proceed.
6. Click **OK**, then **Close**.

**NOTE**

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

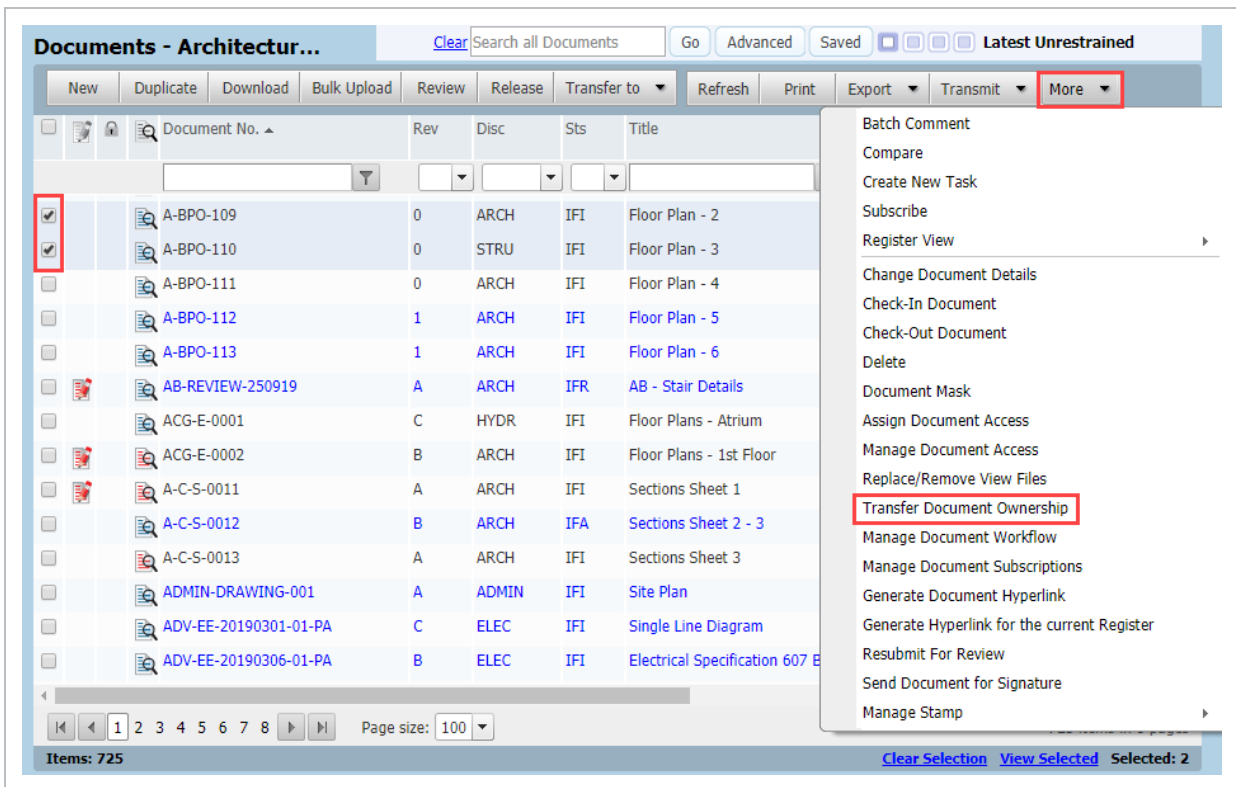
## 3.6 TRANSFER DOCUMENT OWNERSHIP

It may be necessary to transfer ownership of a document from the company that uploaded the document (the originating company), to another company, so that this different company can upload ongoing revisions. A typical example is when the early revisions of documents are uploaded on behalf of another company before their Document Controller is appointed.

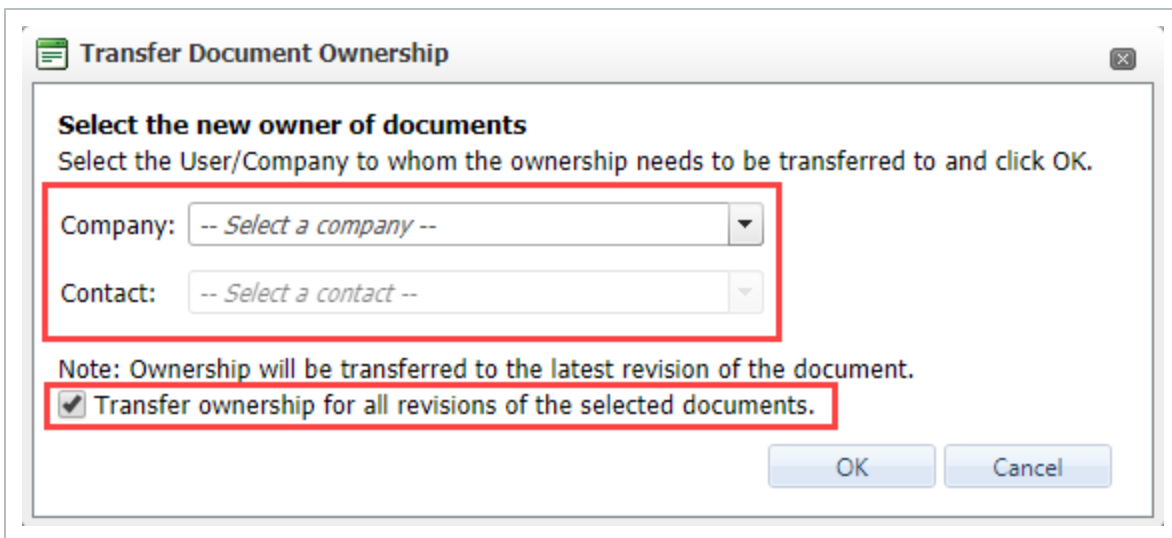
**To transfer document ownership:**

1. From the Document Register, select one or more documents where ownership needs to be transferred.





2. Select **More** then **Transfer Document Ownership**.
3. Select the company and contact to whom ownership must be transferred.



4. Select **All revisions** option at the bottom of screen to transfer ownership of all revisions.
5. Click **OK**.

**NOTE**

You will receive a warning if the company receiving ownership does not have the necessary access. If you proceed with the transfer, ensure the company is granted the access.

## 3.7 REPLACE/REMOVE VIEW FILES

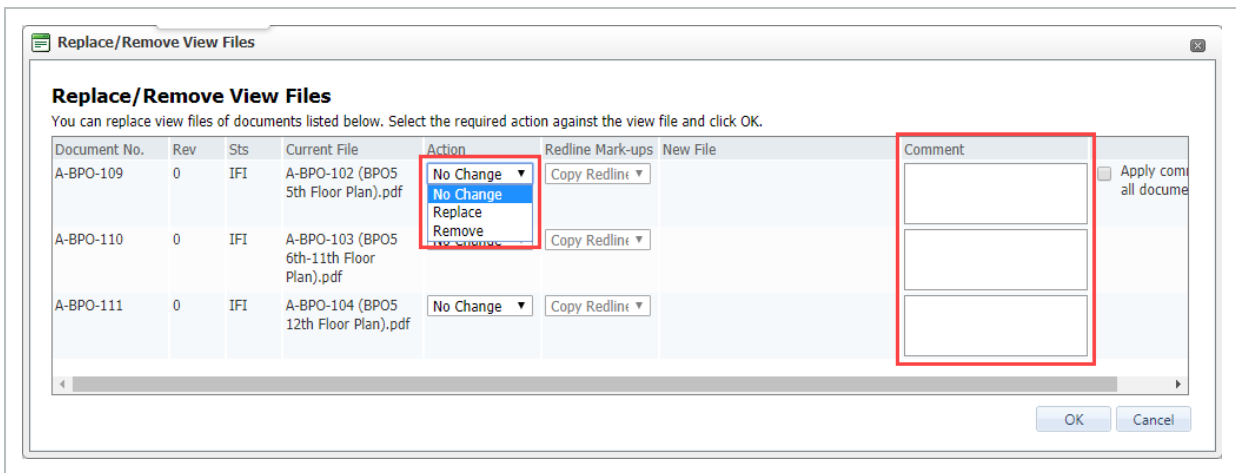
An incorrect view file can be replaced or removed using the **Replace/Remove View Files** option. Note that the format of the replacement view file must be the same as that of the file being replaced.

1. From the Document Register, select the document(s) needing files removed or replaced.
2. Click **More**, then **Replace/Remove View Files**.

The screenshot shows the 'Documents - Architectur...' interface. At the top, there is a search bar with 'Clear Search all Documents' and buttons for 'Go', 'Advanced', 'Saved', and 'Latest Unrestrained'. Below the search bar is a toolbar with buttons: 'New', 'Duplicate', 'Download', 'Bulk Upload', 'Review', 'Release', 'Transfer to', 'Refresh', 'Print', 'Export', 'Transmit', and 'More'. The 'More' button is highlighted with a red box. Below the toolbar is a table with columns: 'Document No.', 'Rev', 'Disc', 'Sts', and 'Title'. Two rows are selected, indicated by checkboxes in the first column and a red box around the checkboxes. The selected rows are: 'A-BPO-109' (Rev 0, Disc ARCH, Sts IFI, Title Floor Plan - 2) and 'A-BPO-110' (Rev 0, Disc STRU, Sts IFI, Title Floor Plan - 3). A context menu is open over the selected rows, listing various actions. The 'Replace/Remove View Files' option is highlighted with a red box. At the bottom of the interface, there are navigation buttons, a 'Page size: 100' dropdown, and a status bar showing 'Items: 725' and 'Selected: 2'.

Document No.	Rev	Disc	Sts	Title
<input checked="" type="checkbox"/> A-BPO-109	0	ARCH	IFI	Floor Plan - 2
<input checked="" type="checkbox"/> A-BPO-110	0	STRU	IFI	Floor Plan - 3
<input type="checkbox"/> A-BPO-111	0	ARCH	IFI	Floor Plan - 4
<input type="checkbox"/> A-BPO-112	1	ARCH	IFI	Floor Plan - 5
<input type="checkbox"/> A-BPO-113	1	ARCH	IFI	Floor Plan - 6
<input type="checkbox"/> AB-REVIEW-250919	A	ARCH	IFR	AB - Stair Details
<input type="checkbox"/> ACG-E-0001	C	HYDR	IFI	Floor Plans - Atrium
<input type="checkbox"/> ACG-E-0002	B	ARCH	IFI	Floor Plans - 1st Floor
<input type="checkbox"/> A-C-S-0011	A	ARCH	IFI	Sections Sheet 1
<input type="checkbox"/> A-C-S-0012	B	ARCH	IFA	Sections Sheet 2 - 3
<input type="checkbox"/> A-C-S-0013	A	ARCH	IFI	Sections Sheet 3
<input type="checkbox"/> ADMIN-DRAWING-001	A	ADMIN	IFI	Site Plan
<input type="checkbox"/> ADV-EE-20190301-01-PA	C	ELEC	IFI	Single Line Diagram
<input type="checkbox"/> ADV-EE-20190306-01-PA	B	ELEC	IFI	Electrical Specification 607 E

3. At the Replace/Remove View Files window, select the action as either **Replace** or **Remove** against each document.



4. For documents where you select the action as **Replace**, select the replacement View File using the **Select** button.
5. Enter any Comments (optional) and click **OK**.

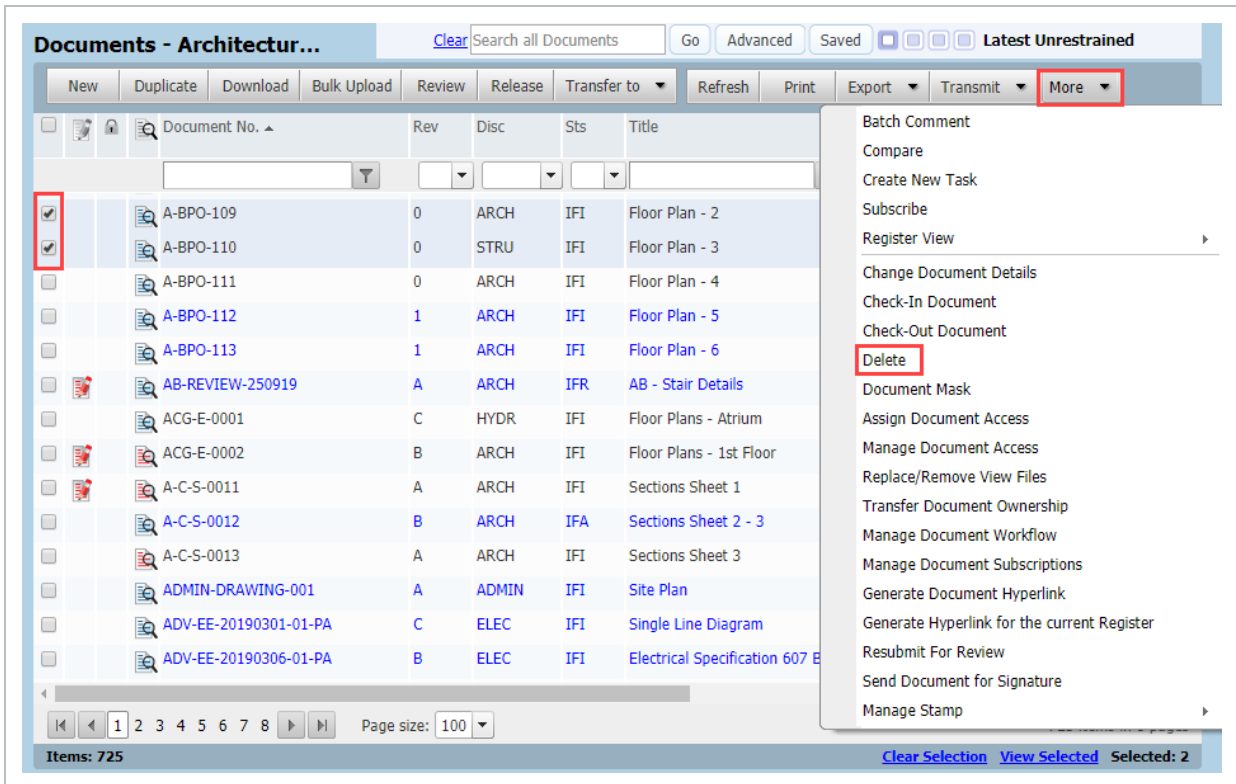
**NOTE** Replacement of view files is limited to documents with the following statuses: unrestrained, restrained where the workflow has not yet been activated or restrained documents awaiting release where the review type is Single not Serial or Parallel.

## 3.8 DELETING DOCUMENTS

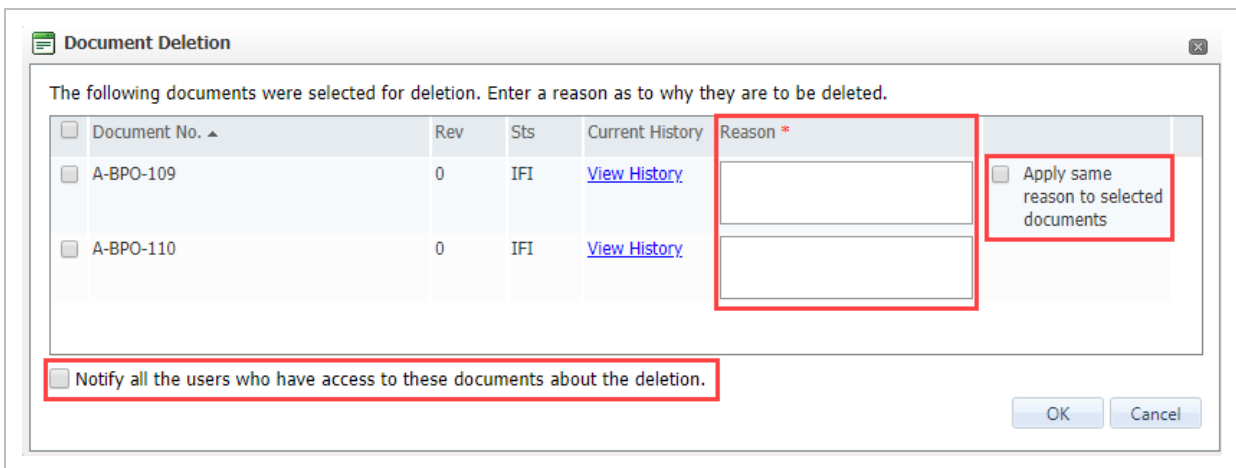
Only users with appropriate access can delete documents. To delete a document:

1. From the Document Register, locate the documents to be deleted.

2. Click **More** then select **Delete**.



3. Enter a reason for the deletion in the **Reason** column against the document, this is a mandatory field.



4. If this reason is the same for the other documents that are being deleted, tick **Apply same reason to selected documents**. A reason must be entered against each document.

5. If all users with access to the document(s) being deleted need to be notified tick this option.

6. Click **OK**, then **Yes** to confirm the deletion.

**NOTE**

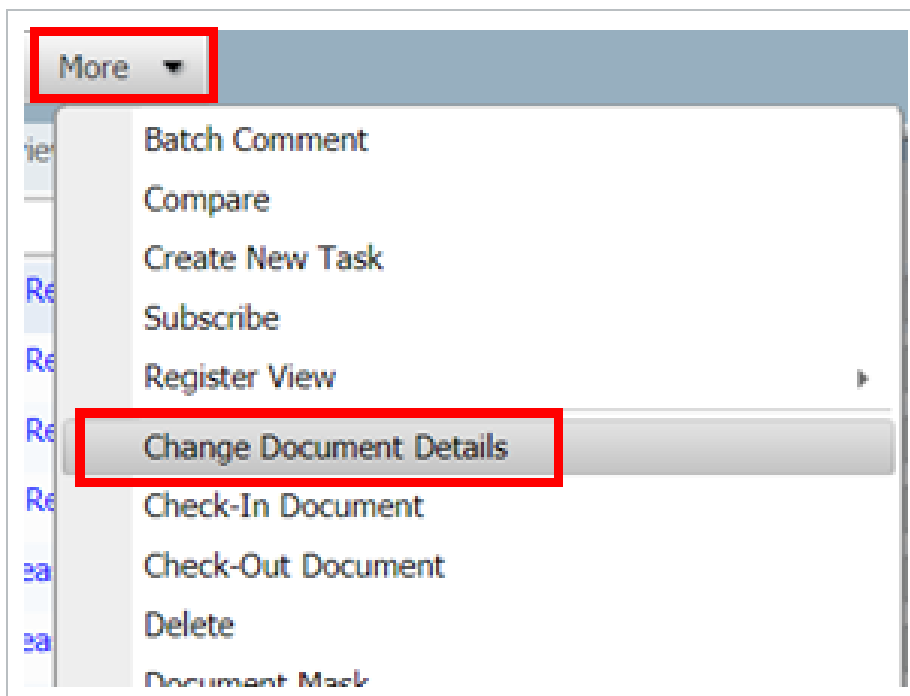
- The View History link can be used to see if the Document has been transmitted to anyone or included within any Packages.
- A full audit history of deleted documents can be accessed via the Reports module. The report will show when, who and the reason entered for the deletion.

## 3.9 CHANGING DOCUMENT DETAILS

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


**To change document details:**

1. Select the document in the Register and click **More** then **Change Document Details**.



2. Edit the details as required.

### Change Document Details

Document No.\*:  

Rev\*:

Status\*:

Title\*:

Discipline\*:

Category:

Area :

Type\*:

Review Status:

From User:


Sender:


Date Recorded:  Date Released:

Revision Notes:

Remarks:

Reason:

 [1 View Files](#)

<input type="checkbox"/> File Name	Size			
<input type="checkbox"/> E-G-L-0001.G.IFI-test.pdf	660 KB	Download	View	

3. Click **Save**.

**NOTE**

- This can only be completed by the Project/Additional Administrators, Users with Security Group access to this function, and the Originator of the document.
- Document details can be changed in bulk if the project setting 'Allow changing details of multiple documents' has been enabled.

## 3.10 TRANSFERRING DOCUMENTS BETWEEN PROJECTS

To transfer documents between InEight Document projects you can download from one project and upload to another or send an InEight Document transmittal from one project to be processed as an incoming transmittal in another project via Unregistered Mail.

To transfer documents between projects using a transmittal:

1. Create a User (User X) in project A with their email address as the project Email-In address for Project B.
2. In Project A create a Transmittal to User X containing the documents to be transferred.
3. In Project B locate the transmittal in the Un-registered mail module.
4. In the transmittal creation screen, click **More** then choose **Process Transmittal as Documents**.
5. The system validates the contents of the transmittal and launches the Bulk Upload Wizard. The details will be a combination of the transmittal details and a lookup of the relevant metadata for each document from Project A.
6. Complete the Bulk Upload Wizard process as normal.

**NOTE**

The transmittal being received needs to originate from InEight Document and be of the type "Latest Documents" or "Latest Revised Documents".

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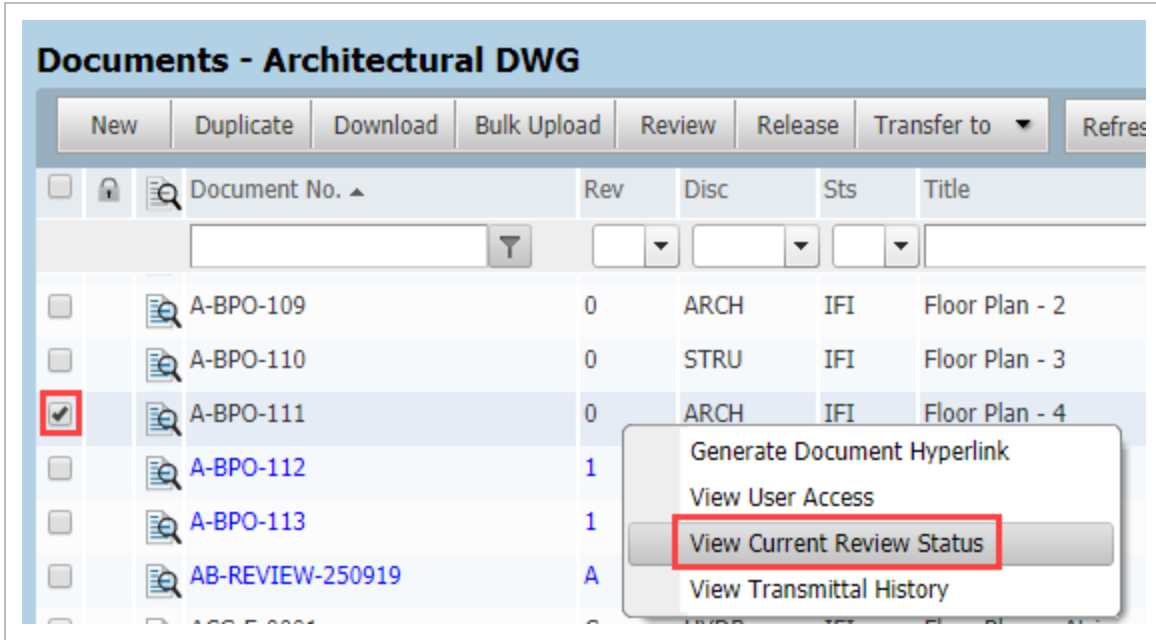


## CHAPTER 4 – ADDITIONAL DOCUMENT FUNCTIONS

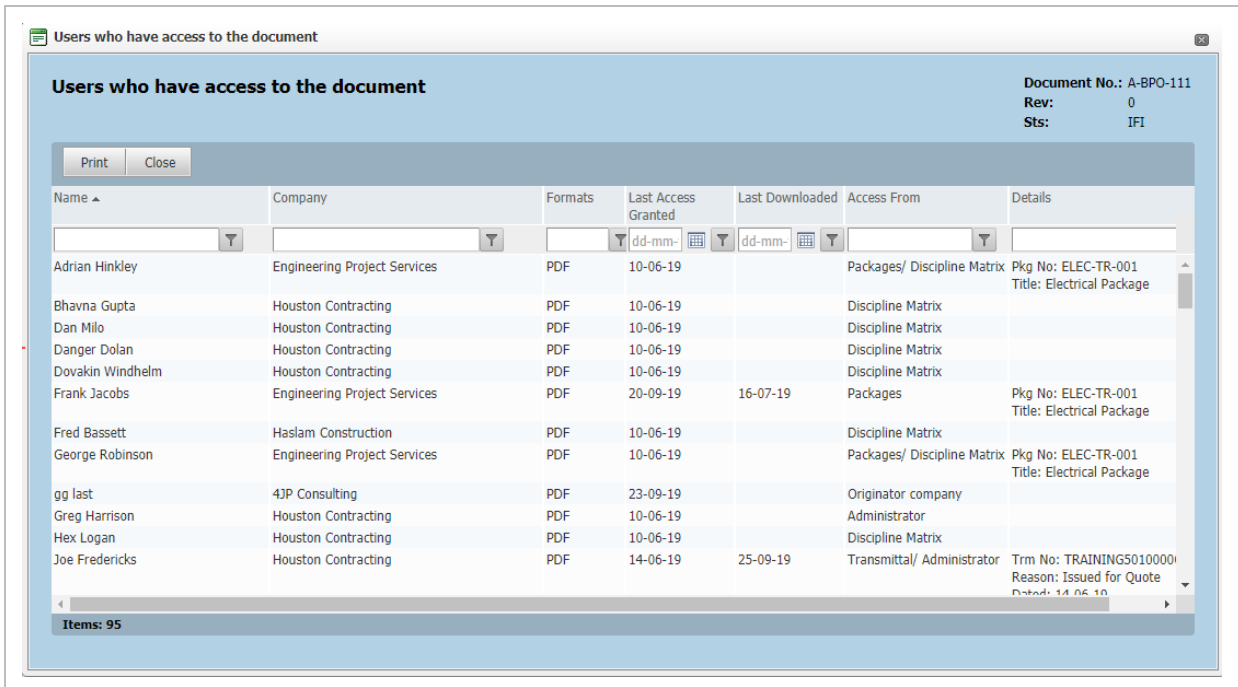
4.1 Viewing Document Review Status .....	41
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### 4.1 VIEWING DOCUMENT REVIEW STATUS

1. In the Document register, right click the document.
2. From the drop-down list, select **View Current Review Status**.



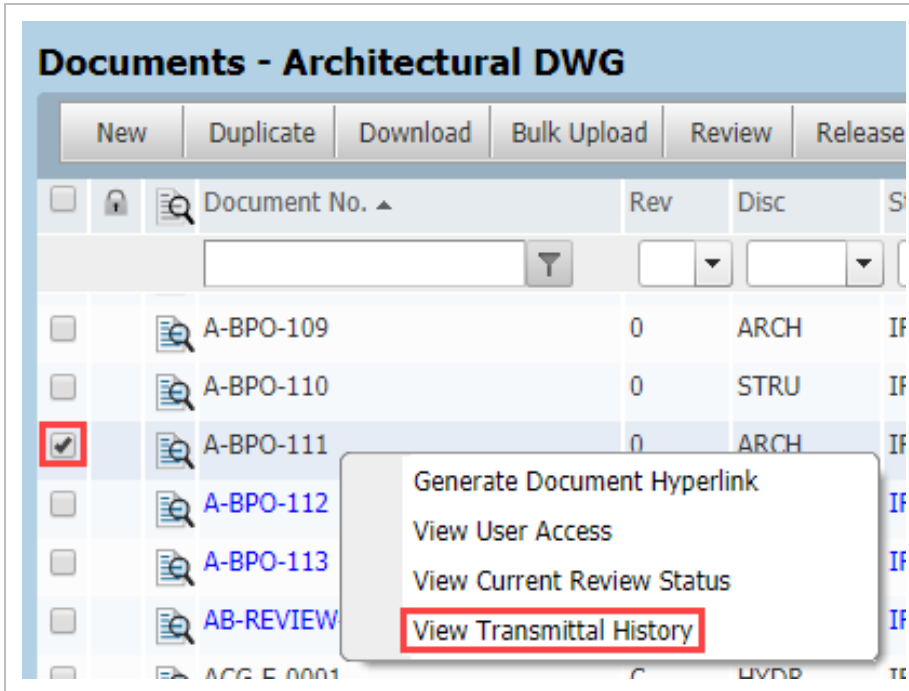
3. If the document is currently awaiting review/release the current review status will load showing who the document is currently sitting with in the workflow.



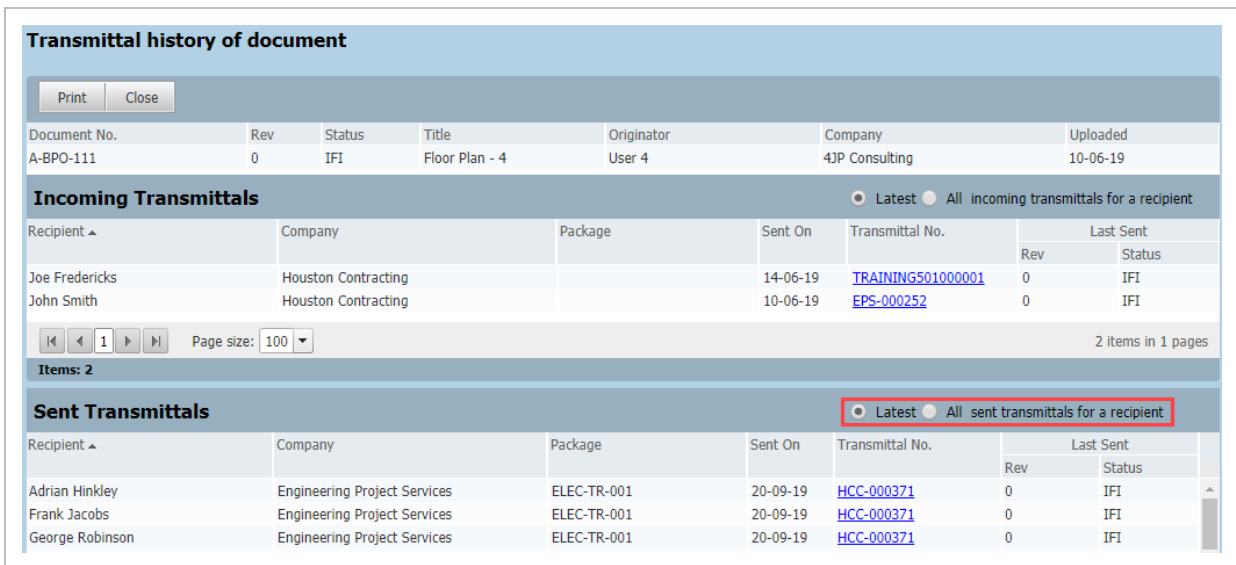
**NOTE** This option needs to be enabled by your Project Administrator and visibility depends on access levels.

## 4.2 TRANSMITTAL HISTORY

1. In the Document register, right click the document.



2. From the drop-down list, select **View Transmittal History**.
3. The transmittal history screen will load with Incoming and Sent Transmittals displayed in grids one above the other.



- Choose between **Latest** and **All**. Latest means that only the most recent transmittal to/from each recipient will be displayed.

**NOTE** To view the actual transmittal, use the hyperlink on the transmittal record.

## 4.3 COMPARING DOCUMENTS

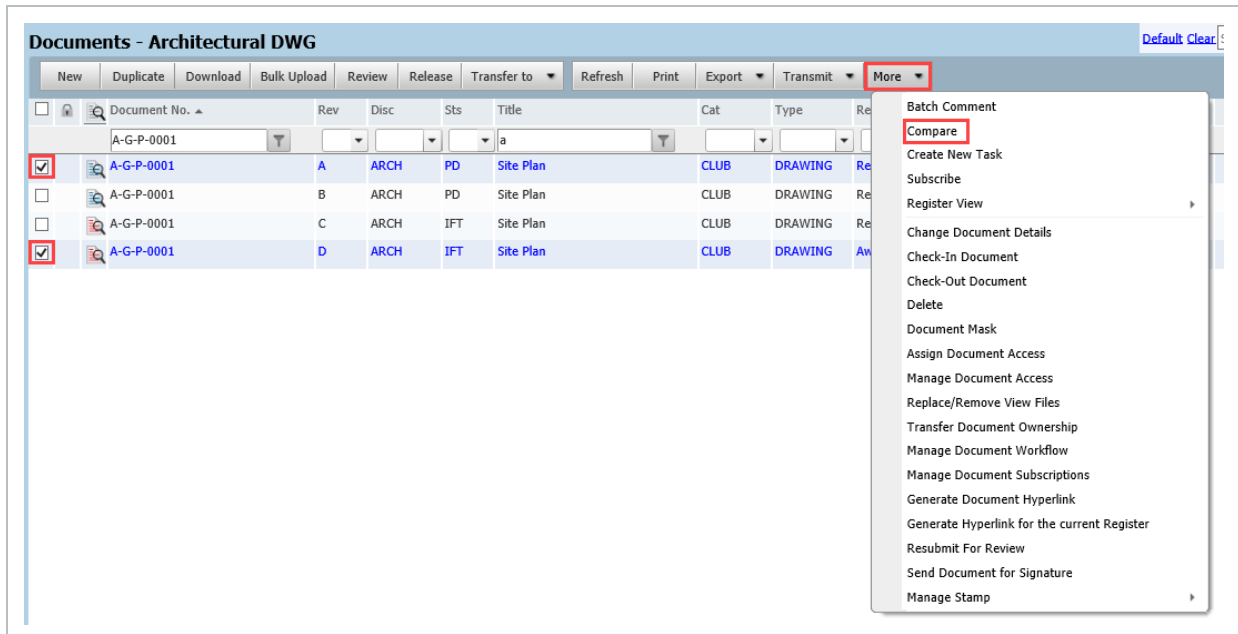
TeamView can be used to compare Documents you have access to. The two documents are overlaid on each other to enable a side by side comparison. For Vector files (such as .DWG) an intelligent overlay occurs so that differences are automatically highlighted. For non-Vector files the content is not compared, just overlaid.

### To compare two different documents:

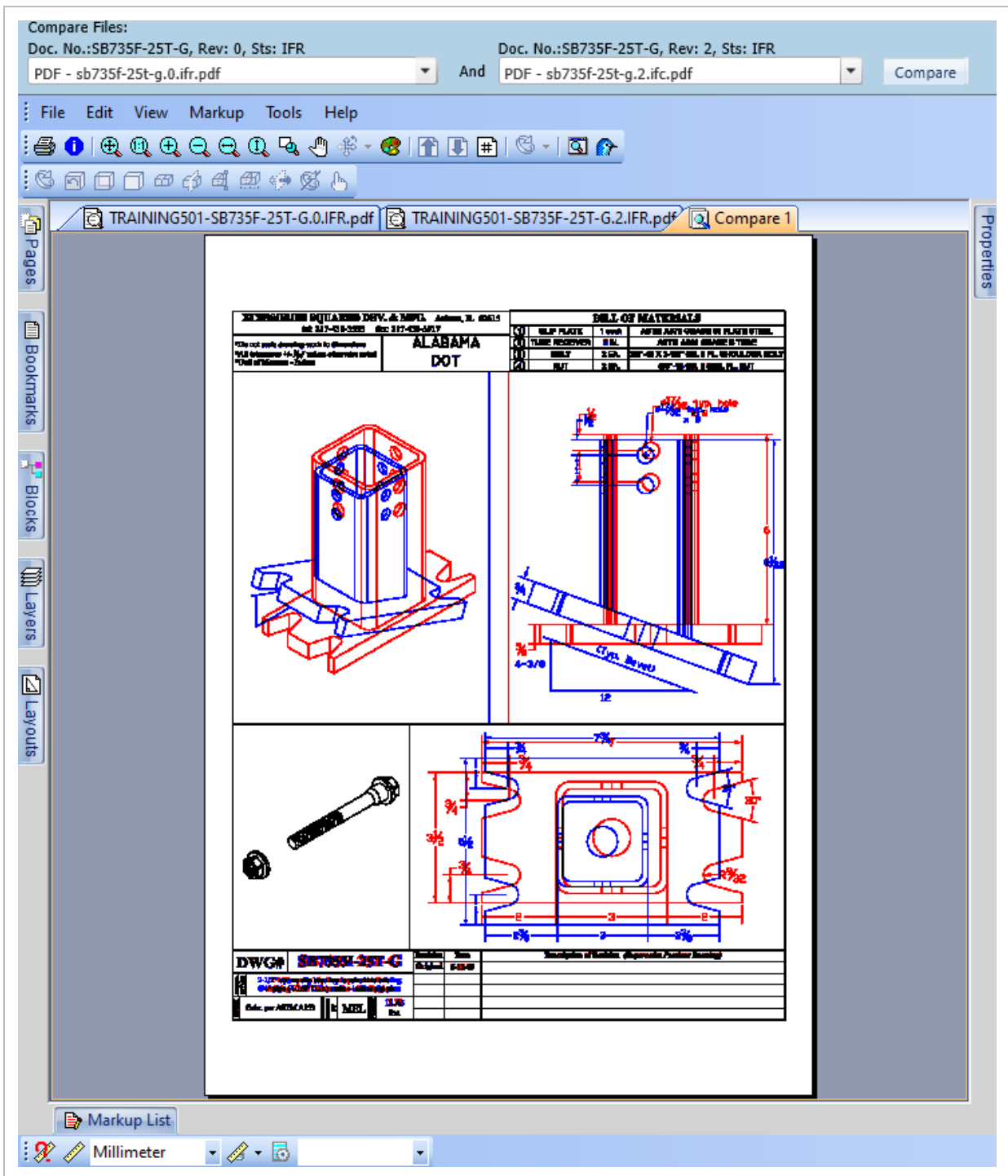
- In the Document Register, select the two documents to compare.
- Select **More** then **Compare**.
- The two documents will then appear overlaid within TeamView.

### To compare two revisions of the same document:

- In the Document Register, select the document (any revision).



2. Select **More** then **Compare**.



3. When prompted, select the revisions of the document and click **Compare**.

4. Alternatively select the revisions of the document to compare in the Document Register then select **Compare** from the **More** menu.

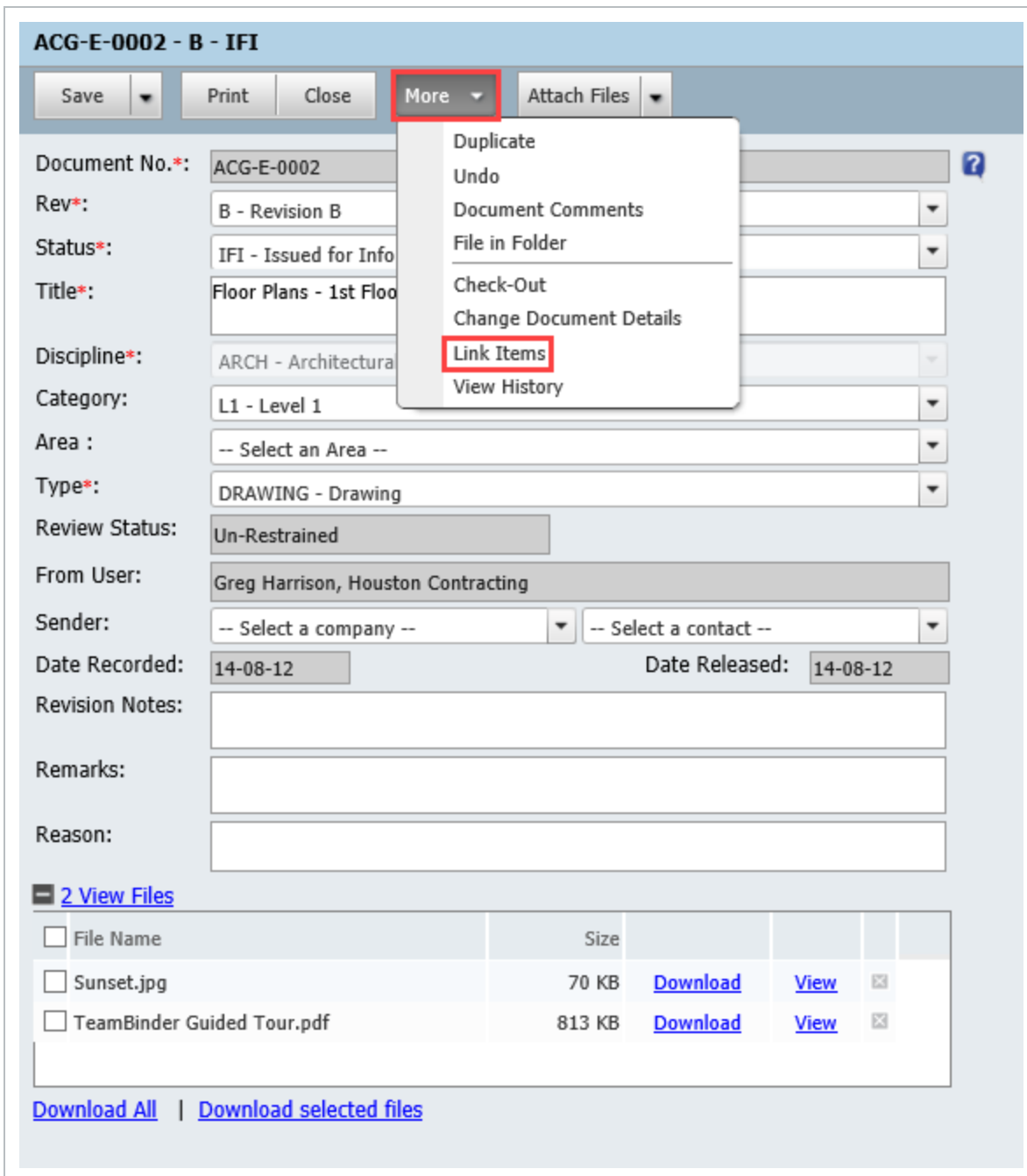
**NOTE**

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

## 4.4 LINKING DOCUMENTS

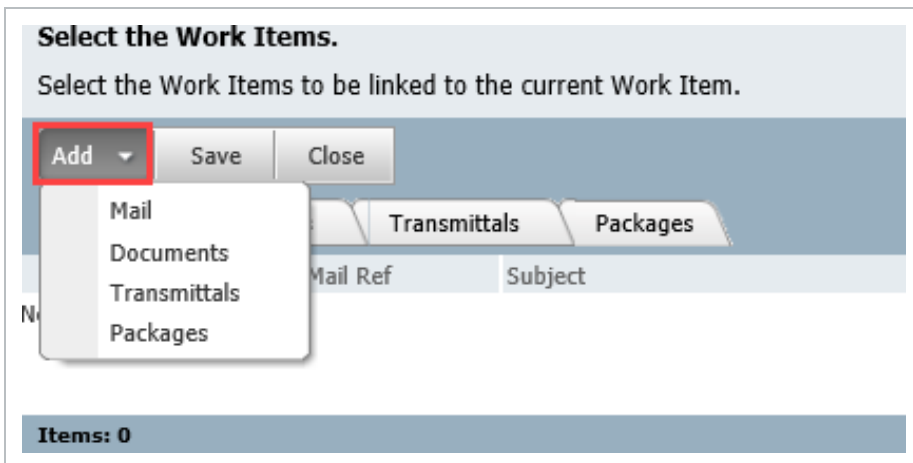
To create links or a thread between two or more documents (and/or mail items) from within the Document module:

1. Open the details screen for the document.



2. From the **More** menu select **Link Items**.

3. Click **Add**, choose the type of work item to add, and search for the item.

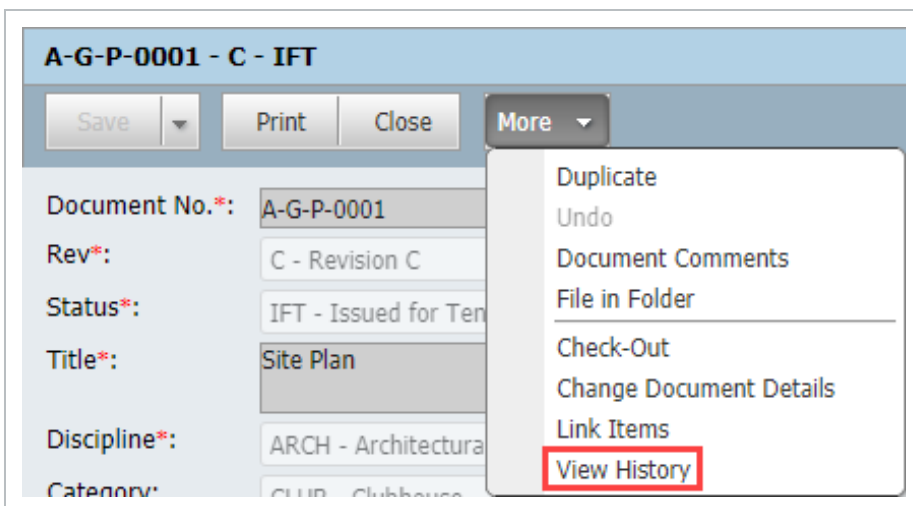


4. Select the items to be linked and **OK** when finished.
5. **Save** the selected items, **Close**.
6. Linked Items are displayed at the bottom of the Document Details window.

## 4.5 VIEWING DOCUMENT HISTORY

To view the history of all actions/changes made in relation to a specific document/revision combination:

1. Open the Document Details screen of the document.
2. Click **More** then select **View History**.





3. If required, filter the Document History by selecting a **Date**, the **Event Type** or **Action By**.

The screenshot shows the 'A-G-P-0001 - History' interface. At the top, there are buttons for 'Refresh', 'Print', 'Close', and 'Export'. A search bar contains 'all History' and a 'Go' button. Below the buttons is a blue bar with 'Expand All Descriptions'. The main table has columns: Date, Event Type, Action By, Description, Notification Details, Rev, and Sts. The 'Date' column has a filter dropdown with 'dd-mm-yyyy' and a calendar icon. The 'Event Type' column has a dropdown menu. The 'Action By' column has a dropdown menu. The table lists various events such as 'Change Document Details', 'Check In Document', 'Document Superseded', etc., with corresponding 'Action By' names like 'edericks (Houston Contracting)' and 'Jacobs (Engineering Services)'. Each row has a 'More Information' link in the Description column.

Date	Event Type	Action By	Description	Notification Details	Rev	Sts
14-10-19 09:46 AM	Change Document Details	edericks (Houston Contracting)			C	IFT
14-10-19 09:45 AM	Check In Document	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:45 AM	Check Out Document	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:45 AM	Comment Added	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:45 AM	Comment Deleted	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:40 AM	Comment Edited	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:40 AM	Comments Released	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 07:47 AM	Company Document Access	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:18 AM	Document Edit	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:18 AM	Document Released	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:18 AM	Document Revised	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:18 AM	Document Superseded	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:03 AM	Document Uploaded	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:02 AM	File Downloaded	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:02 AM	File Viewed	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 05:02 AM	Granted Document Access	edericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
11-10-19 06:21 AM	Lot Document Access	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
09-10-19 03:14 AM	Markup Added	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
09-10-19 03:14 AM	Markup Updated	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
09-10-19 03:14 AM	Ownership Transferred	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
07-10-19 05:12 AM	Recipient Company Document Access	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
07-10-19 05:12 AM	Replace/Remove View Files	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
06-10-19 06:19 AM	Review Completed	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
06-10-19 06:19 AM	Transmittal Cancelled	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
03-10-19 11:12 AM	Transmittal Document Access	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
03-10-19 11:12 AM	Transmittal Sent	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
03-10-19 06:26 AM	View Document Details	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
03-10-19 06:26 AM	Workflow Activated	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
03-10-19 06:26 AM	Workflow Setup	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT
03-10-19 06:26 AM	Workflow Updated	Jacobs (Engineering Services)	<a href="#">More Information</a>		C	IFT

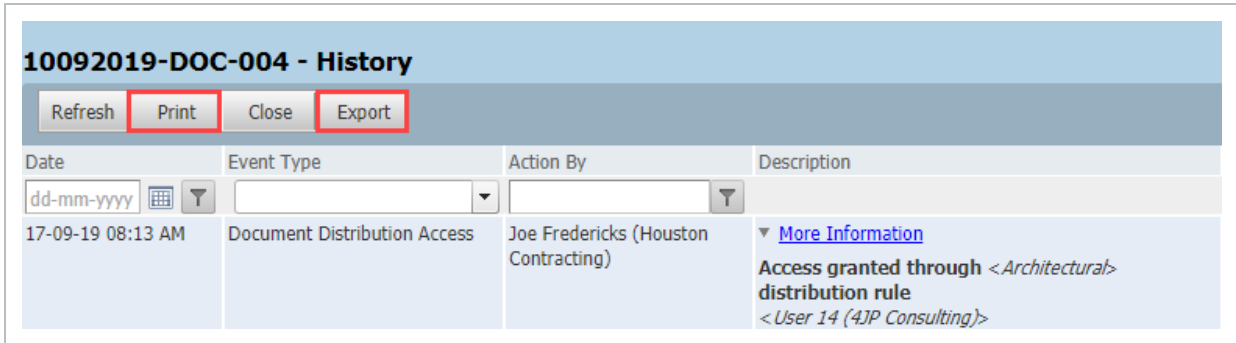
4. Select **More Information** or **Expand All Descriptions** for additional Document History details.

The screenshot shows the 'A-G-P-0001 - History' interface with the 'Expand All Descriptions' button highlighted in red. The table shows the following rows:

Date	Event Type	Action By	Description	Notification Details	Rev	Sts
14-10-19 09:46 AM	View Document Details	Joe Fredericks (Houston Contracting)			C	IFT
14-10-19 09:45 AM	File Viewed	Joe Fredericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:45 AM	File Viewed	Joe Fredericks (Houston Contracting)	<a href="#">More Information</a>		C	IFT
14-10-19 09:40 AM	View Document Details	Joe Fredericks (Houston Contracting)			C	IFT

The 'More Information' link in the second row is highlighted with a red box. Below it, the expanded description is visible: '<A-G-P-0001.C.IFT.PDF>'. The 'Expand All Descriptions' button at the top right is also highlighted with a red box.

## 5. Select Export to extract the Document History to an Excel spreadsheet or Print.

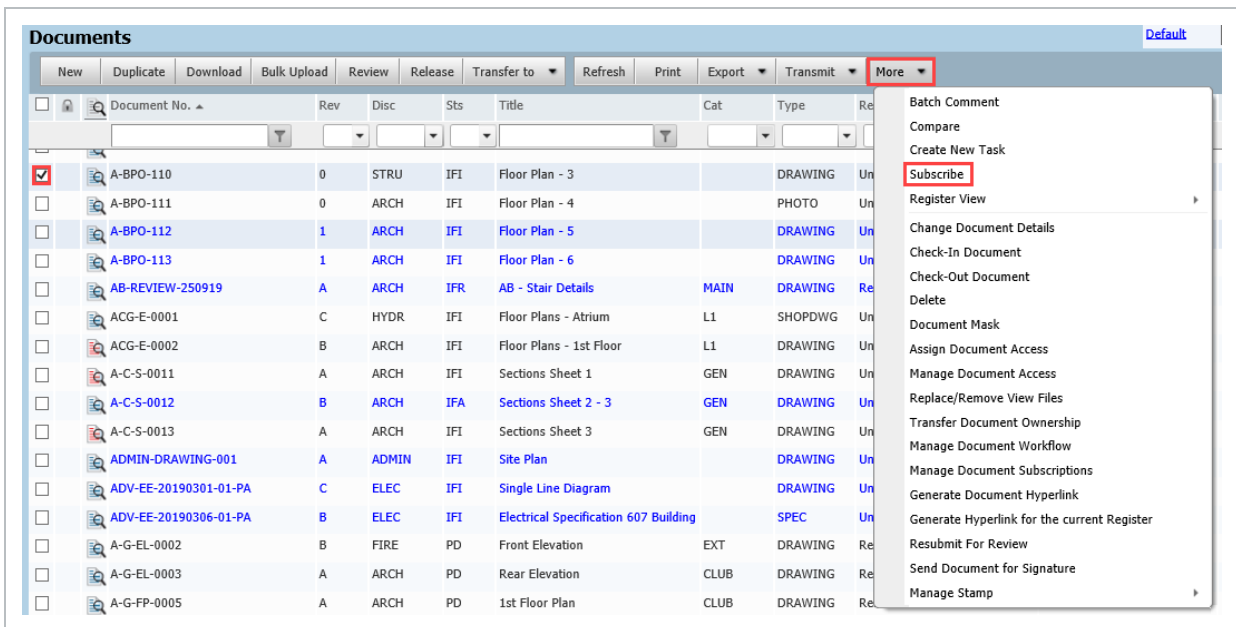


## 4.6 SUBSCRIBING TO DOCUMENTS

Access to documents is controlled on a per document basis. If you can see a document in the register you do not have access to, you can request access by making a subscription request.

**To subscribe to a document:**

1. From the **Document Register** select the document(s) you require access to.



2. Click **More** then select **Subscribe** and choose which file types you require access to.
3. Click **OK**.

**NOTE**

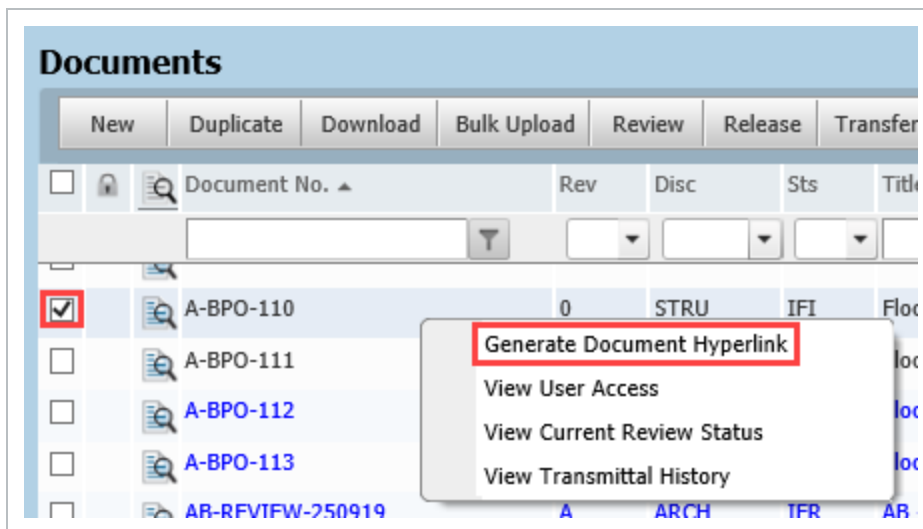
- The request to subscribe to a document is passed either to the Company Administrator the user belongs to or the Project Administrator by email. The relevant Administrator will either approve or reject the subscription request and the user making the request will be notified by email of the outcome.
- Only subscription requests in relation to the latest revision of documents (if approved) will be automatically notified about future revisions.
- Only users belonging to companies for which the setting **Show entire document list** is selected can see documents listed in the register to which they do not have access.

## 4.7 GENERATING A DOCUMENT HYPERLINK

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

To generate a document hyperlink:

1. Locate and select the Document in the Document Register.



2. Click **More** then select **Generate Document Hyperlink**.
3. At the generate document hyperlink window, select **Copy to Clipboard**.
4. Paste the hyperlink to the required location.
5. Click the **Close** button.

**NOTE**

- The recipient of the hyperlink must already have access to the document.
- The recipient of the link will be prompted for their login details if they do not already have an open session of InEight Document.

## 4.8 LINKING TO A BUILDING INFORMATION MODEL (BIM)

For those customers using the BIM viewer (BIM viewing is an optional extra for InEight Document), it is possible to link Mail, Documents or other InEight Document elements to parts of the BIM Model.

When opening an IFC file within the BIM Viewer, right click on a part of the model and choose between creating a New Item (Mail, Document, etc.) or selecting an existing item to link to the part.

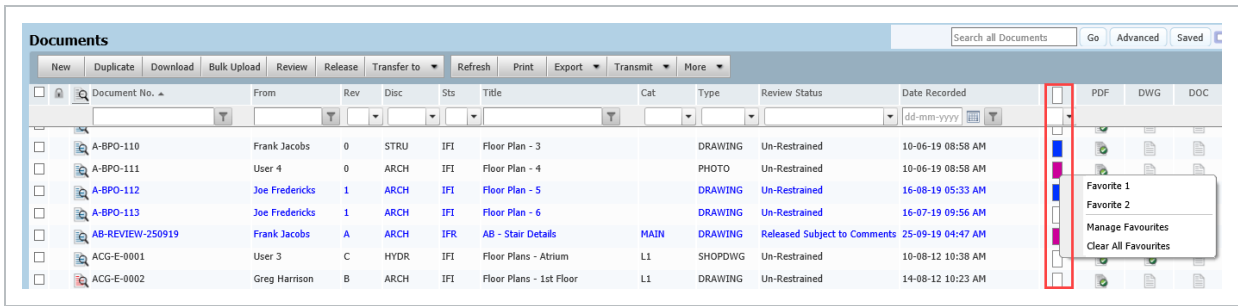
**NOTE**

- Items already linked to a part can be viewed in the sliding pane at the bottom of the BIM Viewer window.
- To link multiple elements of a model to selected InEight Document items in a single process, hold down the Ctrl button **Ctrl** key on the keyboard and then left click on the model elements or the element nodes in the model tree.
- When opening a mail or document within the normal InEight Document registers, if the item has a link to a part in BIM model, the relevant part can be viewed directly in the model by clicking the link entry for that model part.
- When a document linked to a BIM model in InEight Document is revised, the user is prompted whether to carry forward links within the BIM model from the previous Status. Links may be broken in this process depending on the changes to the model.

## 4.9 DOCUMENT FAVORITES

Document Favorites allow users to create their own personal color codes for commonly accessed documents.

1. Click on the Favorite Icon against a document to mark the document with the default color classification. If a favorite classification is already set it will be cleared.



2. Right click on any classification icon then select **Manage Favorites** to create your own classification.
3. Right click then select **Clear all Favorites** to remove all classifications assigned to mail.

**NOTE**

- Add the Favorites icon column to the register via the **More, Register View, Customize** Option. The field name to make visible is "Favorite".
- Favorite classifications are user specific.
- Users can create their own classifications by selecting **Manage Favorites** after right clicking on the favorite icon against any document.
- The **Clear all Favorites** option removes all favorite classifications assigned to all documents.

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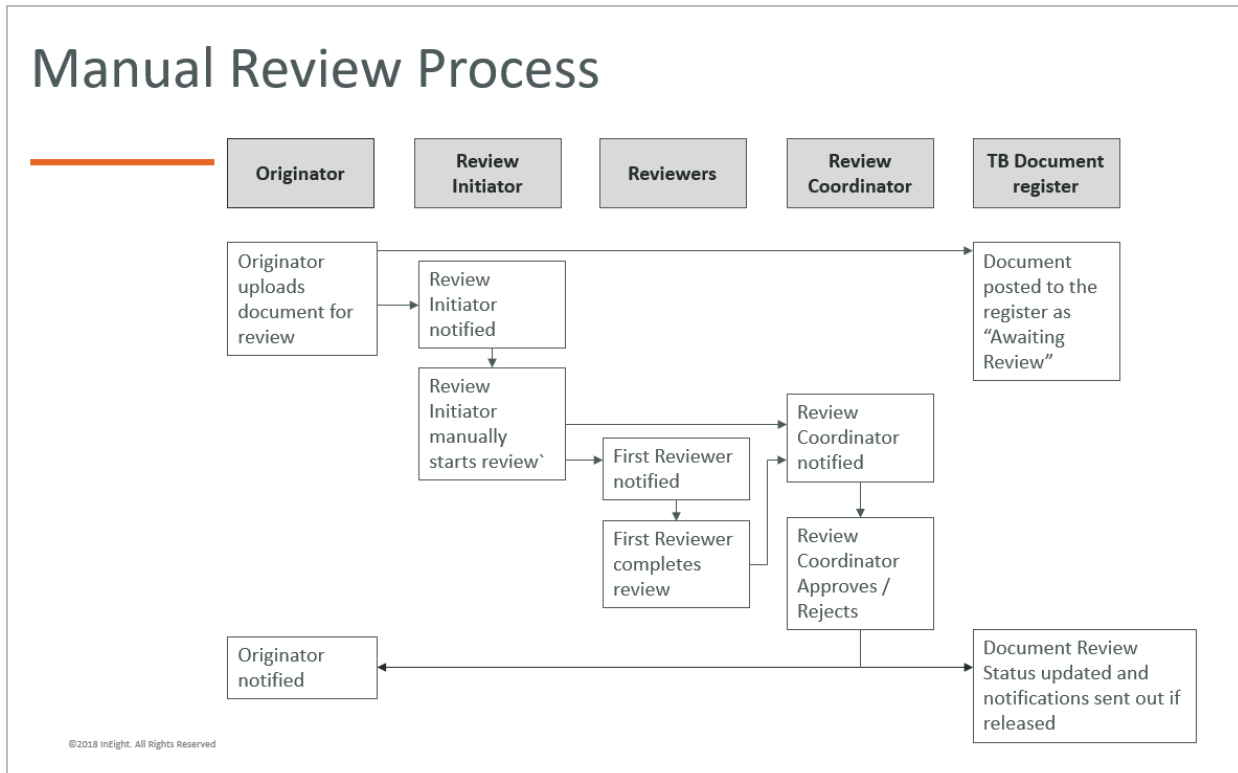
# CHAPTER 5 – DOCUMENT REVIEW AND APPROVAL

## 5.1 OVERVIEW

There are 8 steps in the Document Review (manual workflow) process once a restrained document 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.
8. If Released, the Document is distributed in InEight Document automatically as normal. If rejected, a notification will be sent to the originator and they will make any corrections and re-

submit for review.



## 5.2 UPLOAD OF DOCUMENTS FOR REVIEW

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

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



**NOTE**

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

## 5.3 ACTIVATING A DEFAULT WORKFLOW

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

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 Document Register, click **More** and select **Manage Document Workflow**.

The screenshot shows the InEight Document Manager interface. The top navigation bar includes the InEight logo, 'DOCUMENT' branding, and a support hotline. The main content area is titled 'TRAININGS01 - InEight Document Training Project Master'. A sidebar on the left contains navigation options like 'New', 'Dashboard', 'Mail', 'Documents', 'Transmittals', 'Packages', 'Tasks', and 'Published Reports'. The central 'Documents' register displays a table of document records with columns for Document No., Rev, Disc, Sts, Title, Cat, and Type. A 'More' dropdown menu is open over the table, listing various actions such as 'Batch Comment', 'Compare', 'Create New Task', 'Subscribe', 'Register View', 'Change Document Details', 'Check-In Document', 'Check-Out Document', 'Delete', 'Document Mask', 'Assign Document Access', 'Manage Document Access', 'Replace/Remove View Files', 'Transfer Document Ownership', 'Manage Document Workflow' (highlighted with a red box), 'Manage Document Subscriptions', 'Generate Document Hyperlink', 'Generate Hyperlink for the current Register', and 'Resubmit For Review'.

Document No.	Rev	Disc	Sts	Title	Cat	Type
030819-001	C	ELEC	IFI	Site Plan		MAN
08730003E-001.100.141-02-002-01	A	ADMIN	IFI	TRANSFORMER HOUSING CONCRE	ALL	MAN
08730003E-001.100.141-02-002-02	B	CIV	IFI	TRANSFORMER HOUSING REINFORC	ALL	MAN
08730003E-001.100.141-02-003-01	B	CIV	IFI	TRANSFORMER HOUSING CONCRETI	ALL	MAN
08730003E-001.100.141-02-003-02	B	CIV	IFI	TRANSFORMER HOUSING REINFORC	ALL	MAN
123456	A	CP	IFI	123456		PHOTO
20201703-TR-0001-AT	A	CIV	IFI	Site Plan	EXT	DRAWING
4JP-060919	B	ARCH	IFI	Site Plan		DRAWING
501-HCC-EXT-CIV-001	B	CIV	IFI	Civil Zip	EXT	DRAWING
AAAA	A	ARCH	AFC	asdas	ATR	MAN
A-BPO-108	0	ELEC	IFI	Floor Plan - 1		DRAWING
A-BPO-109	0	ELEC	IFI	Floor Plan - 2		DRAWING
A-BPO-110	3	ELEC	PD	Floor Plan - sheet 1	CAR	DRAWING
A-BPO-111	0	ELEC	IFI	Floor Plan - 4		PHOTO
A-BPO-112	2	ELEC	IFI	Floor Plan - sheet 2	CAR	DRAWING

- Alternatively, from the **Dashboard Workflow** widget, select **Awaiting activation**.

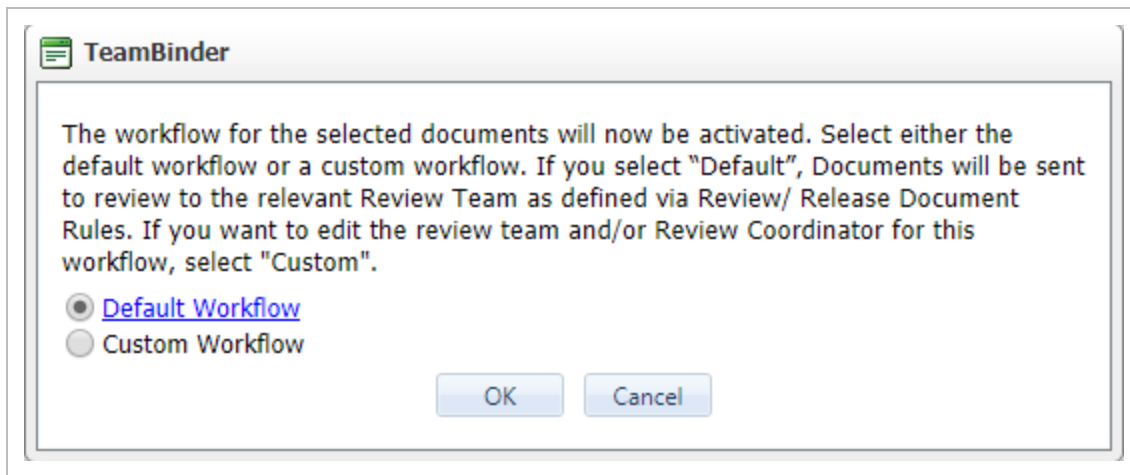
The screenshot shows the InEight Document Dashboard for 'TRAINING501 - InEight Document Training Project Master'. The left sidebar contains navigation options: New, Dashboard (selected), Mail, Documents, Transmittals, Packages, Tasks, and Published Reports. The main content area has two widgets: 'Documents' and 'Workflow'. The 'Documents' widget lists 16 items, including [Empty], Drawing, Manual, Photograph, Register, and Report. The 'Workflow' widget shows 0 To Review, 24 To Release (with a '24 overdue' indicator), 204 All overdue reviews, 30 All overdue releases, 41 Uploaded with overdue reviews, 10 Uploaded with overdue releases, and 395 Awaiting activation (highlighted with a red box). Filter buttons for Type, Discipline, Status, and Review Status are visible below the widgets.

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

The screenshot shows the 'Manage Document Workflow' screen. At the top right, there is a search bar and a filter dropdown menu with 'Review not started' selected and highlighted by a red box. Below the search bar is a toolbar with buttons: Activate (highlighted with a red box), Refresh, Batch Comment, Print, Close, Export, and More. The main area is a table with the following columns: Document No., Rev, Sys, Title, Disc, Cat, Workflow Members, Review Required By, Type, Review Coordinator, and Review Start Date. The first row is selected with a red checkbox.

Document No.	Rev	Sys	Title	Disc	Cat	Workflow Members	Review Required By	Type	Review Coordinator	Review Start Date
20201703-TR-0001-AT	B	IFR	Site Plan	CIV	EXT	Add/Edit	dd-mm-yyyy	DRAWING	Civil (Role)	dd-mm-yyyy
ADMIN-REPORT-001	A	IFC	Test BN	ADMIN		Add/Edit		REPORT	Joe Fredericks (Houston Contracting)	
AMT-MANREVIEW-LW-060320	A	IFC	AMT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-021219	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-031219	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-24022020	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-261119-01	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
CIV-MAN-001	A	AB	Site Plan	CIV	EXT	Add/Edit		MAN	Civil (Role)	

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



6. The review process will be activated using the rules based review team each document relates to.
7. At the review activation confirmation message click **OK**.

**NOTE**

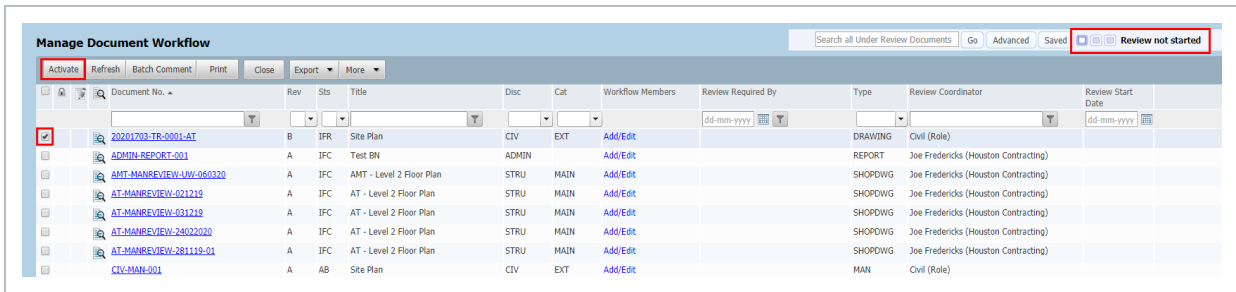
- The first reviewer (for serial reviews) or all reviewers (parallel reviews) will be notified by email to complete their review(s).
- The default rules based review team can be modified during the activation process by clicking the **Add/Edit** link at the **Manage Document Workflow** screen. The changes only apply to the document against which you clicked Add/Edit. Once saved a prompt to activate the workflow for this document will appear.
- 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.
- If the option is enabled, the Review Initiators can Release/Reject a document prior to activation of workflow.

## 5.4 ACTIVATING A CUSTOM WORKFLOW

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

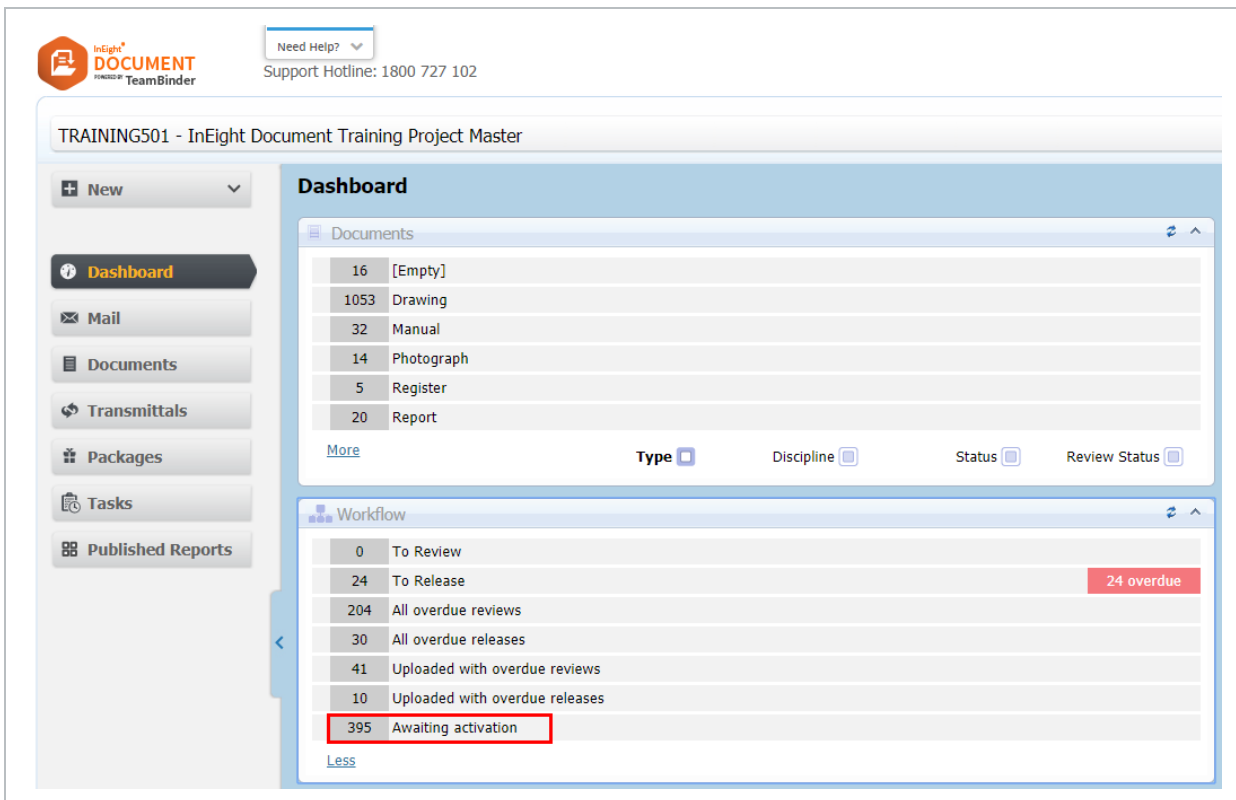
To activate a custom workflow:

1. From the Document Register, click **More** and select **Manage Document Workflow**.



Document No.	Rev	Srs	Title	Disc	Cat	Workflow Members	Review Required By	Type	Review Coordinator	Review Start Date
20201703-TR-0001-AT	B	IFR	Site Plan	CIV	EXT	Add/Edit		DRAWING	Civil (Role)	
ADMIN-REPORT-001	A	IFC	Test BN	ADMIN		Add/Edit		REPORT	Joe Fredericks (Houston Contracting)	
AMT-MANREVIEW-UW-060320	A	IFC	AMT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-021219	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-031219	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-24022020	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
AT-MANREVIEW-281119-01	A	IFC	AT - Level 2 Floor Plan	STRU	MAIN	Add/Edit		SHOPDWG	Joe Fredericks (Houston Contracting)	
CIV-MAN-001	A	AB	Site Plan	CIV	EXT	Add/Edit		MAN	Civil (Role)	

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



TRAININGS001 - InEight Document Training Project Master

Need Help? Support Hotline: 1800 727 102

**Dashboard**

**Documents**

16	[Empty]
1053	Drawing
32	Manual
14	Photograph
5	Register
20	Report

[More](#) Type Discipline Status Review Status

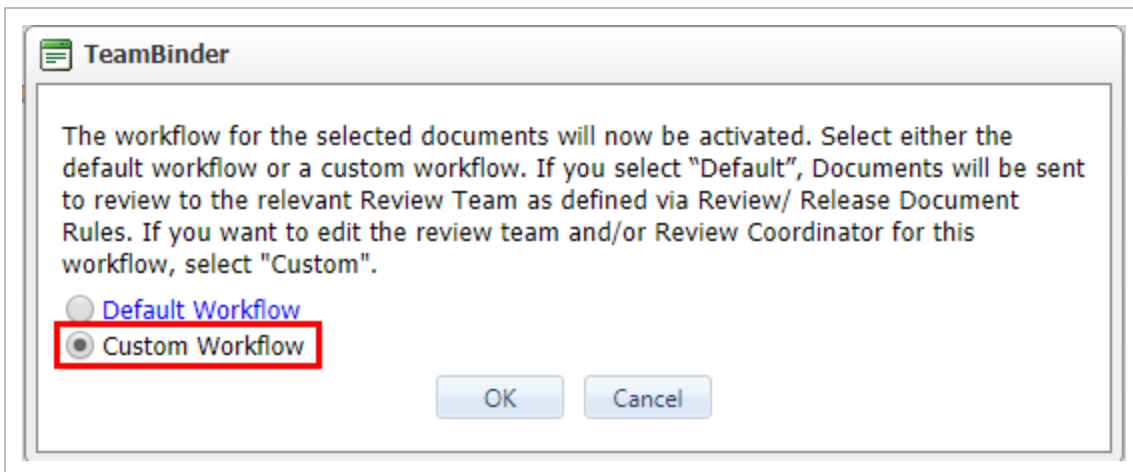
**Workflow**

0	To Review	
24	To Release	24 overdue
204	All overdue reviews	
30	All overdue releases	
41	Uploaded with overdue reviews	
10	Uploaded with overdue releases	
395	Awaiting activation	

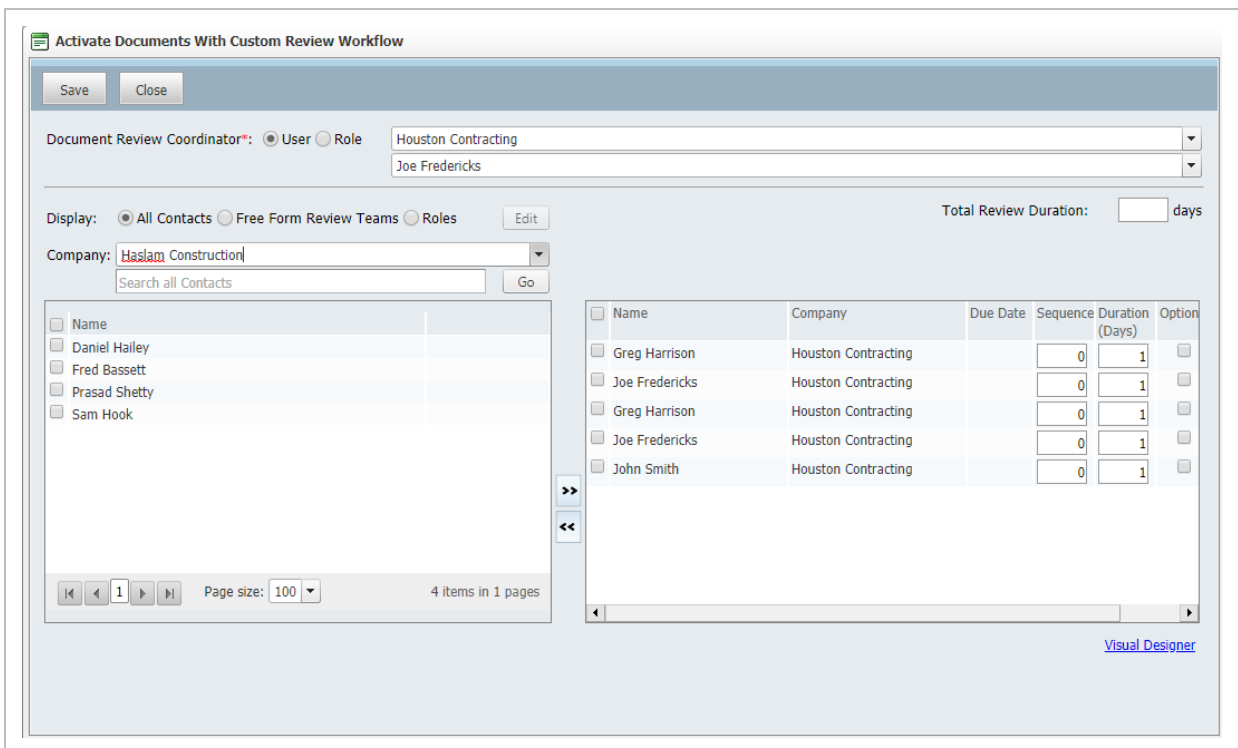
[Less](#)

3. At the **Manage Document Workflow** screen, by default “Review not started” is listed. Select the documents to activate the review process.
4. Click the **Activate** button.

- At the next window select **Custom Workflow** and click **OK**.



- 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.
- Select the **Review Coordinator** or **Role** for the Review.



- Select the **Reviewers** to make up the review team. use the Company drop down list to select the company the reviewers belong to. Then move the relevant contacts to the right hand pane.

9. Repeat the above step for any reviewers from other companies.
10. Enter the required **sequence** and **review duration** for each reviewer.
11. Enter the **Total Review Durations** for the review.
12. Click **Save** to activate the workflow and click **OK** at the confirmation message.

**NOTE**

- 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.

## 5.5 MODIFY AN IN-PROGRESS WORKFLOW

A workflow can be modified once it has been activated.

To modify the in-progress workflow:

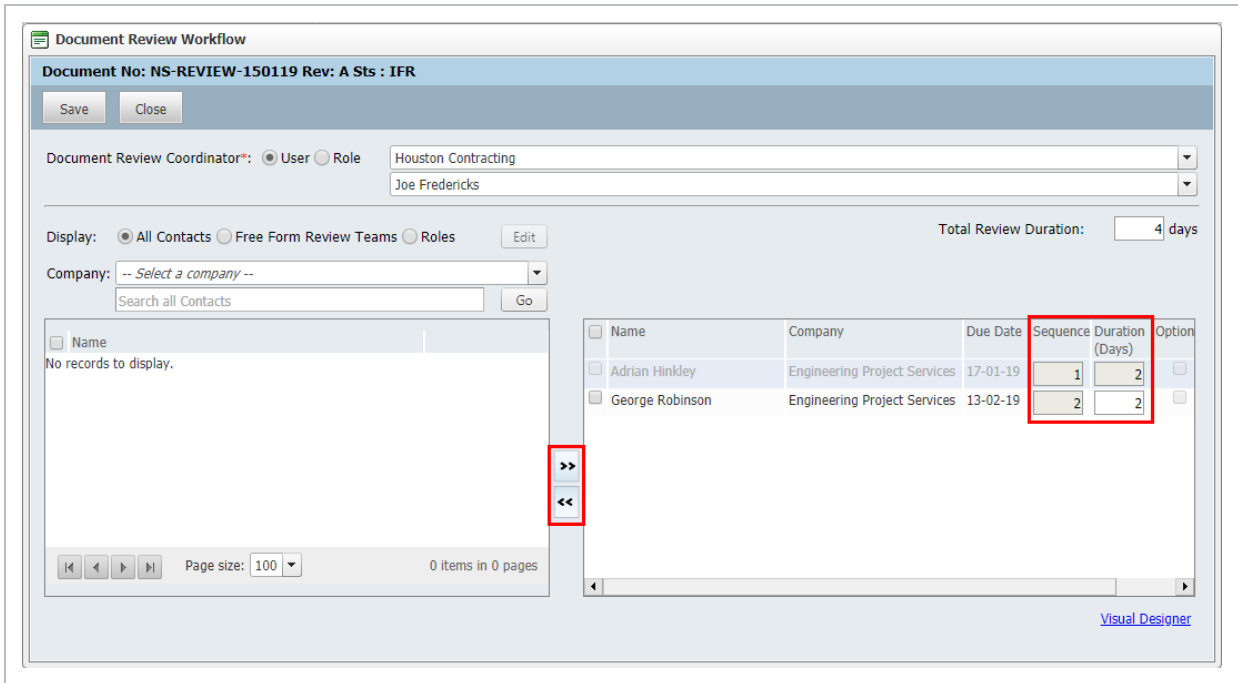
1. From the Document Register, go to **More**, then **Manage Document Workflow**.
2. Alternatively, from the **Dashboard, Workflow** widget select **Awaiting activation**.
3. At the **Manage Document Workflow** screen, change the option to view “Reviews in progress” at the top of the screen.

Document No.	Rev	Sts	Title	Disc	Cat	Workflow Members	Review Required By	Type	Review Coordinator	Review Start Date
01.01.03	D	IFC	MANUFACTURING DRAWING	ARCH	MAIN	Add/Edit	27-08-19 11:25 AM	DRAWING	Joe Fredericks (Houston Contracting)	23-08-19
010103	B	IFR	Main Building Architectural Layout	ARCH	MAIN	Add/Edit	15-03-19 08:40 AM	DRAWING	Joe Fredericks (Houston Contracting)	13-03-19
02.01.02	C	IFC	Level 3 Fire Safety Design	ARCH	MAIN	Add/Edit	15-03-19 08:40 AM	DRAWING	Joe Fredericks (Houston Contracting)	13-03-19
1234567	A	PD	1234567	EW-OC		Add/Edit	28-02-19 12:12 PM	PHOTO	Adrian Hinkley (Engineering Project Services)	12-02-19
20201203-TR-0001-AT	B	IFR	Site Plan	CIV	EXT	Add/Edit	30-03-20 05:20 AM	DRAWING	Civil (Role)	27-03-20
AA-REVIEW-150119	A	IFR	AA-Stair Details	STRU	MAIN	Add/Edit	25-01-19 09:48 AM	DRAWING	Joe Fredericks (Houston Contracting)	15-01-19
AB-MANREVIEW-250919	A	IFC	AB - Level 2 Floor Plan	STRU	MAIN	Add/Edit	05-11-19 11:17 AM	SHOPDWG	Joe Fredericks (Houston Contracting)	30-10-19
A-BPO-101	0	IFC	Floor Plan - 1	ARCH		Add/Edit	14-06-19 08:55 AM	DRAWING	Joe Fredericks (Houston Contracting)	10-06-19
A-BPO-102	0	IFC	Floor Plan - 2	ARCH		Add/Edit	14-06-19 08:55 AM	DRAWING	Joe Fredericks (Houston Contracting)	10-06-19
A-BPO-103	0	IFC	Floor Plan - 3	ARCH		Add/Edit	14-06-19 08:55 AM	DRAWING	Joe Fredericks (Houston Contracting)	10-06-19
A-BPO-104	0	IFC	Floor Plan - 4	ARCH		Add/Edit	14-06-19 08:55 AM	DRAWING	Joe Fredericks (Houston Contracting)	10-06-19

4. Click **Add/Edit** against the document to modify the workflow.

Document No.	Rev	Sts	Title	Disc	Cat	Workflow Members	Review Required By	Type	Review Coordinator	Review Start Date
F-S-01001	B	PD	Ground Floor Fire Services Layout	FIRE	MAIN	Add/Edit	13-07-12 06:11 AM	MAN	Gina Joseph (Houston Contracting)	11-07-12
A-S-SCH-002A	F	IFT	Material Schedule 2	ARCH	CLUB	Add/Edit	08-08-12 10:16 AM	SCHED	Joe Fredericks (Houston Contracting)	02-08-12
SMC-REVIEW-07112018	A	IFR	JP-stair Details	ARCH		Add/Edit	18-07-18 01:12 AM		Joe Fredericks (Houston Contracting)	12-07-18
SMC-MANREVIEW-07112018	A	IFC	JP-Level2 Floor Plan	STRU		Add/Edit	14-12-18 10:51 AM		Joe Fredericks (Houston Contracting)	10-12-18
A-S-FP-0002	B	PD	1st Floor Plan	ARCH	CLUB	Add/Edit	26-12-18 04:35 AM	DRAWING	Joe Fredericks (Houston Contracting)	20-12-18

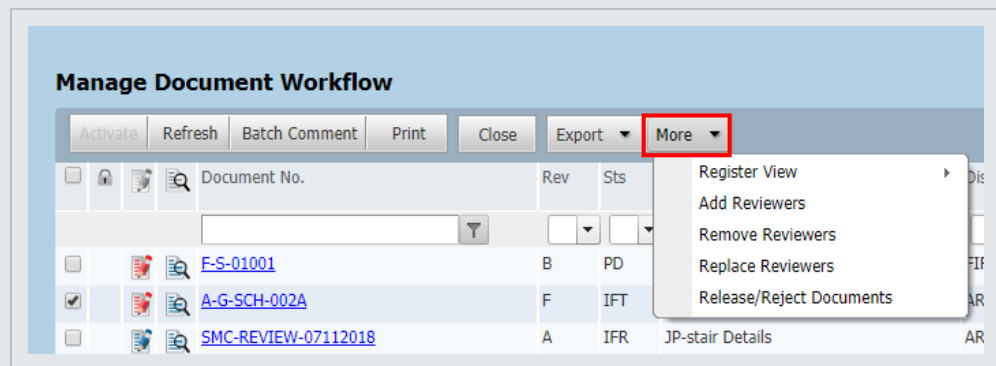
- 5. Add/Remove members from the workflow or modify the sequence and durations for each reviewer as required. Reviewers who have either completed their review or have been notified to commence their review cannot be removed or adjusted.



- 6. Click **Save**.

**NOTE**

- To Add / Remove/ or Replace reviewers in bulk, from within the Manage Document Workflow window, select the relevant workflows, go to **More** 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.



## 5.6 REVIEWING DOCUMENTS

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

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

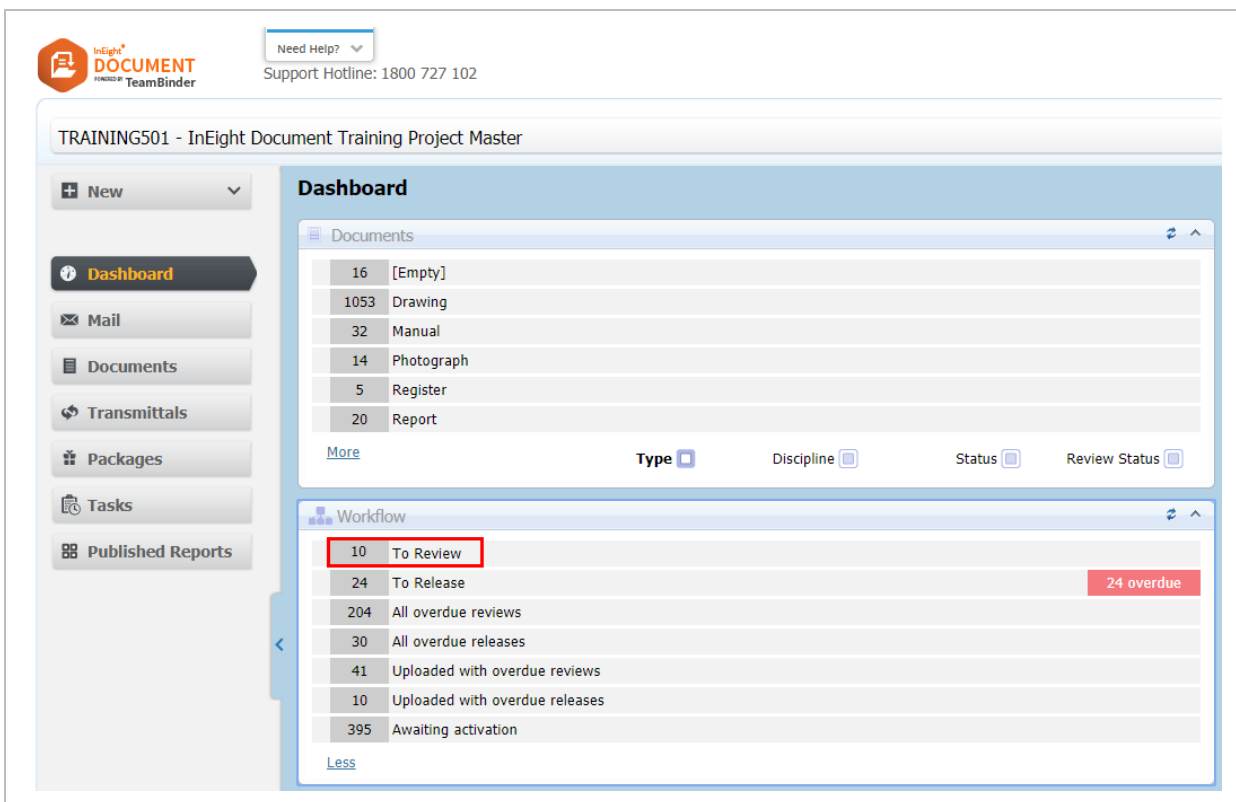
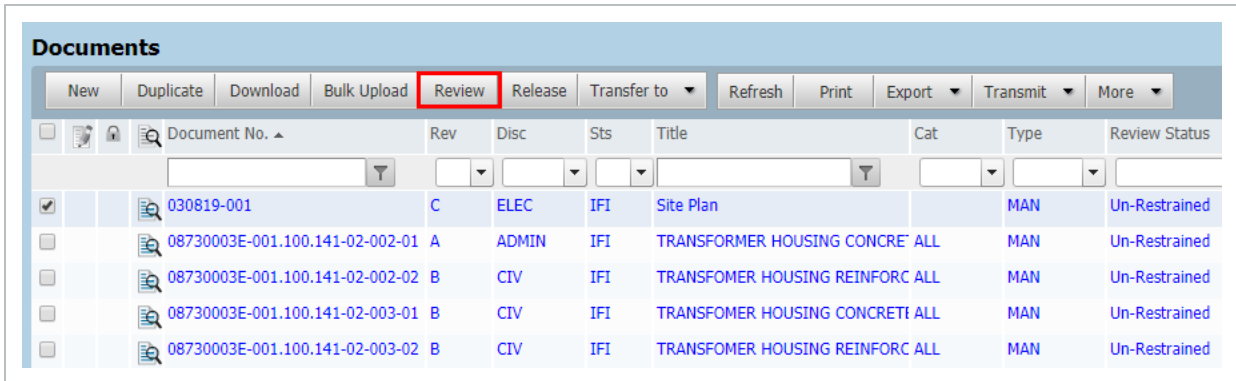
1. Redline the drawings on-line.
2. Make text comments against the document on-line.
3. Attach an external file eg MS Word document of comments.
4. Attach a scanned copy of a hardcopy mark-up.

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.

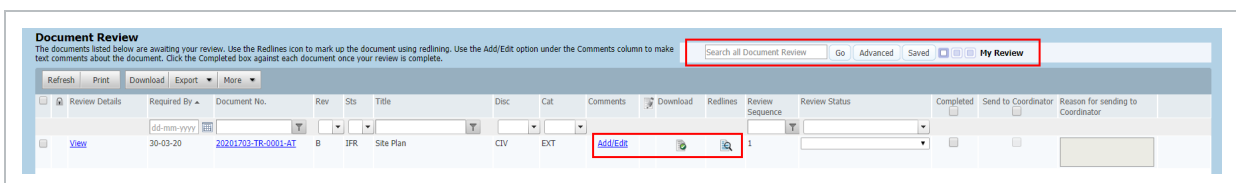
Using the Document Review screen:



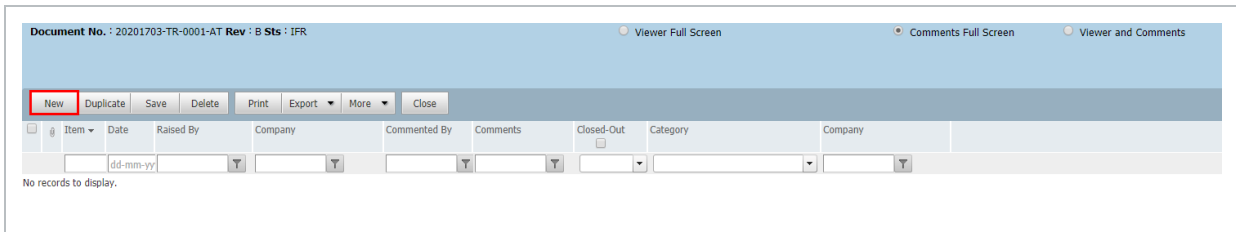
1. From the Document register, click the **Review** button. Alternatively use the hyperlink in the **Workflow Widget** at the Dashboard .



2. If there are many documents awaiting review use the Search box or the Advanced Document Search option to find or filter documents listed.



3. Click the **Download** icon to download the document to a PC for either printing or offline review. If the hardcopy is marked up, scan and upload as an attachment.
4. Click the **Redlines** icon to open the document in the online viewer TeamView (if activated on your project). The document can be marked up (red-line) and make text comments.
5. Click the **Add/Edit** link in the **Comments** column to add electronic comments to the documents. Click the **New** button to add a comment and enter your comment.

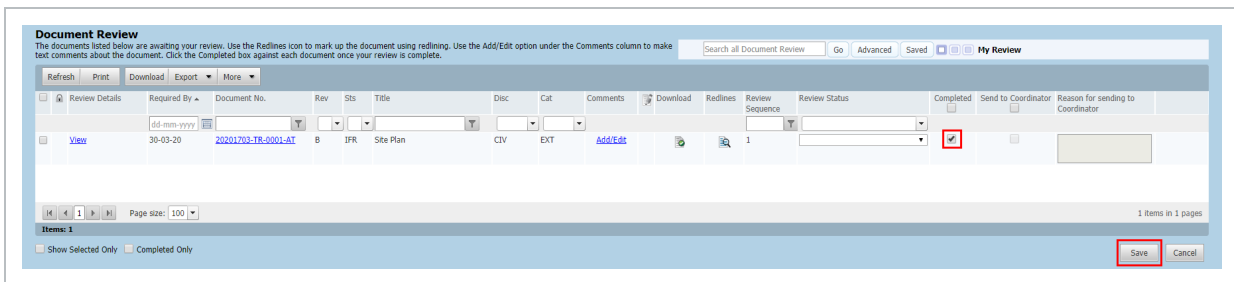


- To attach external files, click **Attach Files** and select one or more files to attach and click **Open**.

The screenshot shows the 'New Comment' form. At the top, there is a header with 'New Comment' and three buttons: 'Save', 'Close', and 'Attach Files'. Below the header is a toolbar with various text formatting options: font (Arial), size (13px), bold (B), italic (I), underline (U), strikethrough (x²), link (A), unlink (A), list (bulleted and numbered), indent, outdent, undo, redo, and a blue checkmark icon. Below the toolbar is a large text area for entering the comment. Below the text area are two dropdown menus: 'Category : -- Select a Comment Category --' and 'Raised By : -- Select a company --' followed by another dropdown menu for 'Contact : -- Select a contact --'.

- Select a **Category** for your comment (optional).
- A comment raised on behalf of a 3rd party is specified in the **Raised by** value.
- Click **Close** when finished to return to the Comments window and click **Close** again to return to the Document list in the Review screen. An icon appears next to the Document with a tool tip “Review text comment available”.

6. Once your review is complete, tick the **Completed** box and **Save**.



## 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).
- 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 **More**, **Register View** then **Customize**.
- InEight Document has been fully integrated with Bluebeam Studio to enable document reviews via Bluebeam rather than TeamView. Contact InEight for details.

## 5.7 REDLINING DOCUMENTS

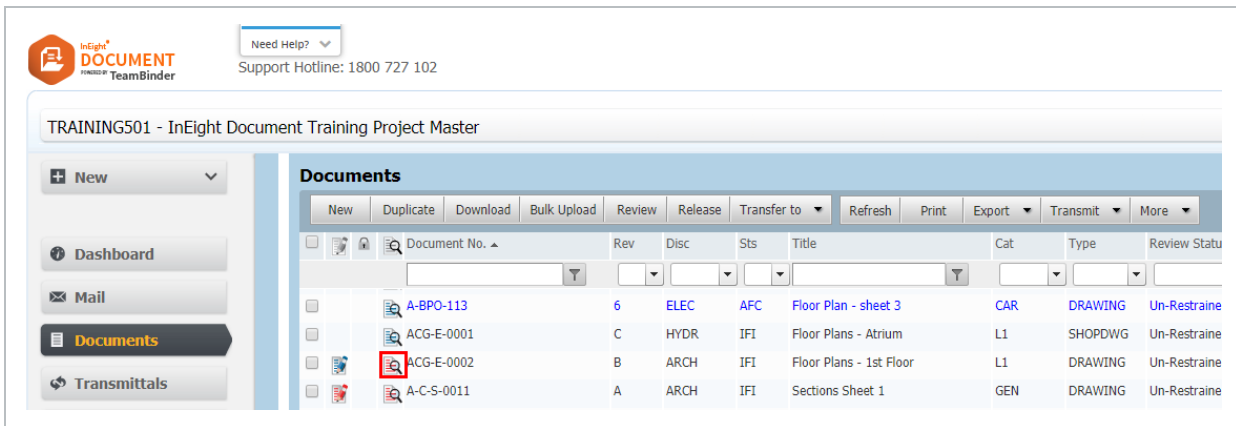
Red-lining (mark-up) is available only on Projects where TeamView has been activated. TeamView is a web based viewing application developed by InEight that can be used in conjunction with InEight

Document for viewing and mark-ups of drawings.

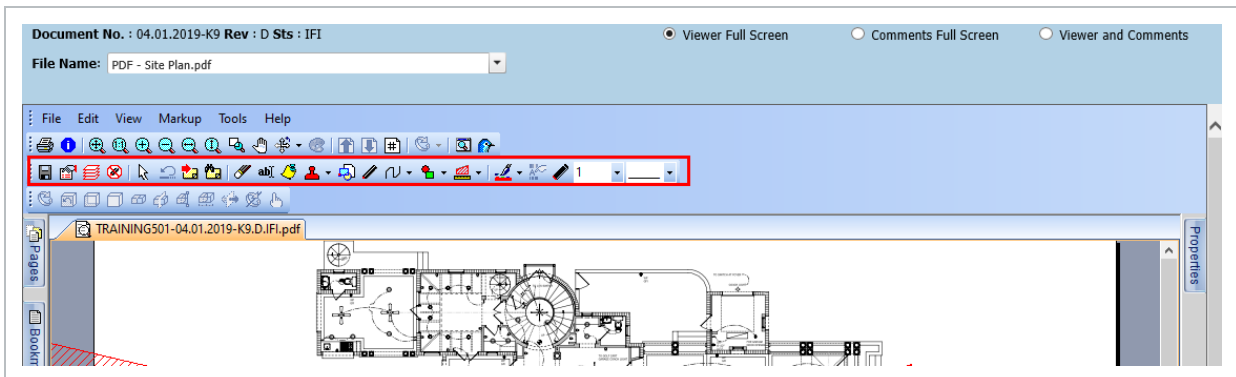
There are two versions of TeamView, one based on Active X technology and the second based on HTML5. The version of TeamView suitable for your browser will be loaded automatically. The icons and their explanations below are based on the Active X version of TeamView.

To red-line a document:











1. From the **Document Register**, locate the document to red-line.
2. Click the **View** icon, if there are more than 1 format available a prompt will ask which one to open.









3. The Document image will be displayed in a new browser window, rendered up by TeamView.



4. Use the Red-lining toolbar to mark up the document. The icons on the vertical toolbar have the following meanings:

Icon	Purpose
	Enable/Disable Redline Toolbar buttons
	Save or Refresh Mark-ups
	<b>Mark-up Settings:</b> These include the user signature (defaults to the logged in User company Id and user Id (recommend you do not change this); Mark-up Layer and default font and color of mark-ups.
	<b>Mark-up Layer control:</b> Used to toggle on and off mark-ups either by User or Layer.
	<b>Marker:</b> Use this option to set the mark-ups to transparent mode. If you draw a filled rectangle for example you can see what is behind it.
	<b>Undo:</b> Undo last action
	<b>Edit:</b> Used to select and edit a mark-up. Click this button and then click on the mark-up. The mark-up then appears with handles at each corner. Use the R handle to rotate the mark-up. Use the Z handle to Zoom the mark-up. Double click to edit the text.
	<b>Link:</b> This is not applicable to TeamView within InEight Document.
	<b>Text:</b> Click this button and then click on the document/drawing where you want to enter the text. A text window will appear, type the required comment. The options for how text displays include using an arrow to point to the item, putting a bubble or frame around the text, and the font required. Click <b>OK</b> and drag the text to the required position.
	<b>Note:</b> Click the button and then click on the drawing or document where the note is to be added. A text window appears. Enter the note and click <b>OK</b> . The note is displayed on the drawing as a note icon.

Icon	Purpose
	
	<b>Rubber:</b> Click the button and then drag over the area to be rubbed out. This includes parts of the drawing (the original drawing is unaffected) and mark-ups.
	<b>Lines:</b> Used to draw lines. Use the drop down list to configure the line style. Choose between: Freehand pen, Lines, Curves and Measurement Area. For all these options, click the start point and drag. Then click and drag to the next point. When done, right click.  Lines and Measurement Area can be hatched, filled, opened or closed.
	<b>Shape:</b> Used to draw a shape: Use the drop down list to select between: Rectangle; Rounded rectangle; Oval; and Bubble options. It is also possible to control whether the shape will be Outlined, Filled or Edged.
	<b>Arrow:</b> Used to draw straight line arrows. Use the drop list to configure the arrow style. Choose between: Arrow or Dimension (draws a line with the dimension shown between the two end points); Single; Single Filled; Double; and Double Filled. Filled refers to the arrow heads.
	Mark-up line thickness

5. Click **Save**.

**NOTE**

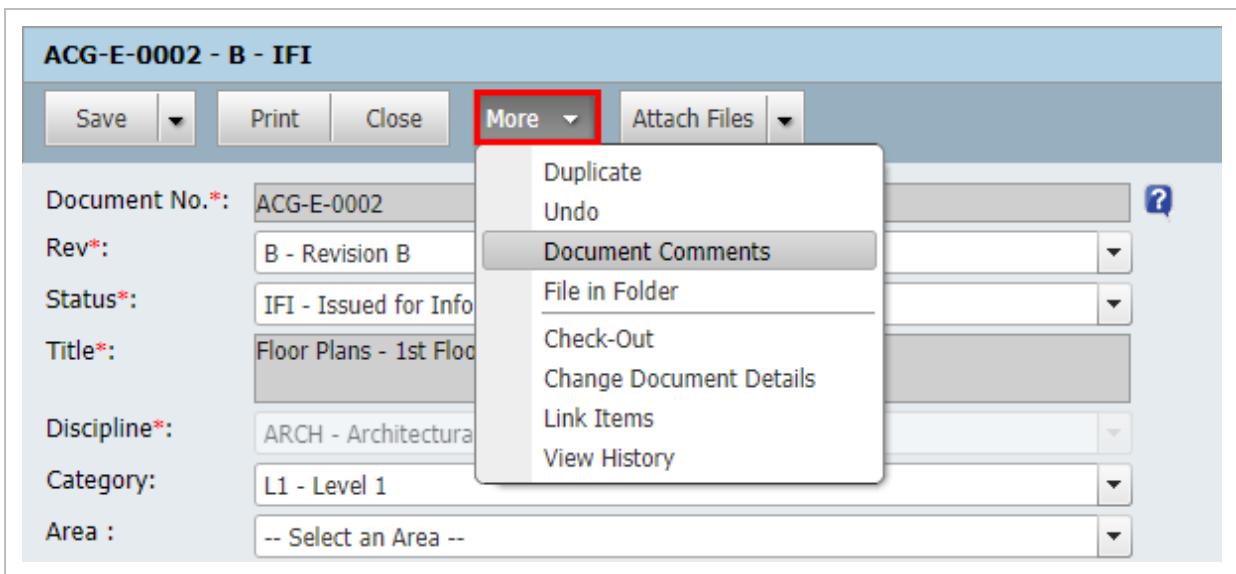
- In addition to red-lining text comments can also be added.
- To see any red-lines/mark-ups made by other users use the Layers control at the left hand side of the screen.
- The Default color used when redlining documents can be defined for the user via User Preferences – General.

## 5.8 COMMENTING ON DOCUMENTS

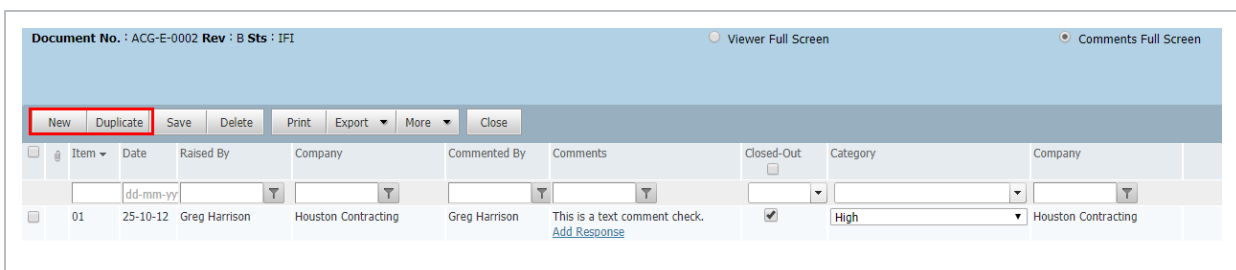
If you have access to a document, it is possible to make text comments about the document from within the document register. Comments can be either added from within the document details window or from within the Viewer.

To comment on a document:

1. From the **Document Register**, locate the document to comment on.
2. Double click on the document to open the details screen.
3. Go to **More**, then **Document Comments**.



4. Click **New** to add a new comment or click **Duplicate** to create a new comment based on an existing comment.



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

**New Comment**

Save Close Attach Files

Comments :\*

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Category : -- Select a Comment Category --

Raised By : -- Select a company -- -- Select a contact --

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



**NOTE**

- Making comments by this method is not in place for making comments as part of the document review process. Completing the review is still managed in the document review process.
- Documents in the document register that have existing comments against them are displayed with a comment icon to the left of them.
- Comments can be emailed automatically by ticking the relevant boxes to send your comments to any or all of the following:
  - The Document Originator
  - The Review Coordinator
  - Everyone who has access to the document
- To apply the same comments against multiple documents you have access to, select the documents in the Document Register, go to **More** then **Batch 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 go to **More**, then **Download Attachments**.
- 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 are responded to.
- Though a review has been completed a notification may be sent that another reviewer has commented. If a response is required this can still be added from the document register (even though the document is still under review). Comments adding in this way are still considered review comments and accessible only to other reviewers and the review coordinator.
- Comments can be added from within TeamView. An image of the document and the comments text box can be seen together. From TeamView choose:
  - **Comments Full Screen** – The comments window will load full screen
  - **Viewer and Comments** – To see both the viewer and comments.
- Typically comments can only be **closed out** by: the originator of the comment; the Review Coordinator; or the Project Administrator.
- Use the “Raised by” option in text comments to indicate if the comment was raised by another person. Both the Originator and Raised by person have the same access privileges to the comment.

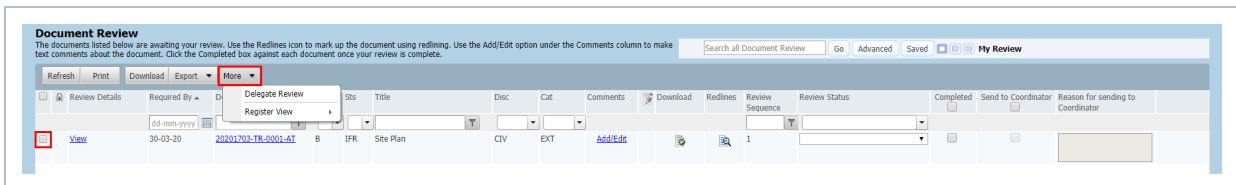
**NOTE**

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

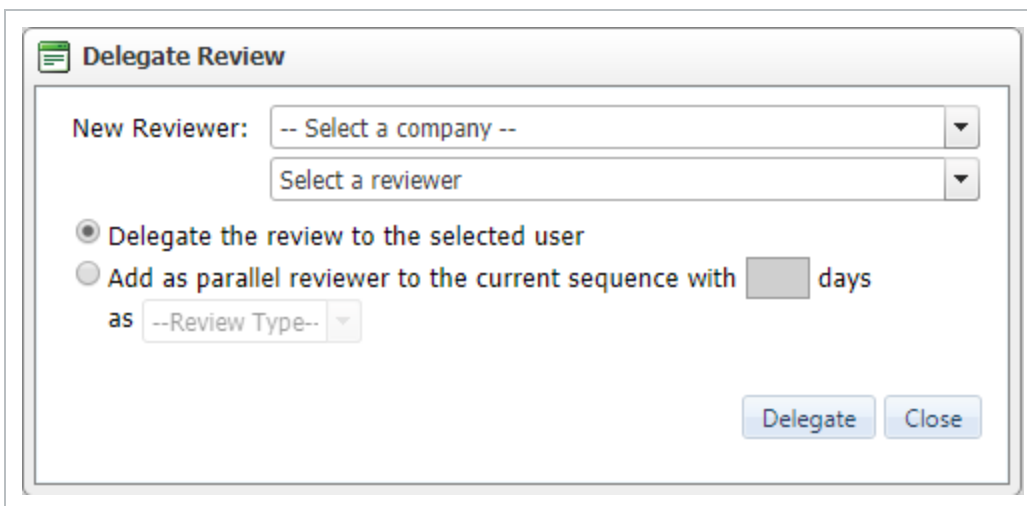
## 5.9 DELEGATE REVIEW

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

1. Select one or more Documents from the Review Screen.
2. From **More** select **Delegate Review**. This feature is only available under **My Review**.



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



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**.
5. Select **Delegate**.


## 5.10 DOCUMENT REVIEW APPROVAL/RELEASE

Once all reviewers have completed their reviews of a restrained document in a workflow, the Review Coordinator will receive an email notification. The Review Coordinator will use the **Document Release** screen will conduct their own review, select comments to include and apply a review status which will either release or reject the document.

Using the Document Release screen:

1. From the Document Register, click the **Release** button. Alternatively use the hyperlink in the **Workflow** widget from the Dashboard.

Documents										
<span>New</span> <span>Duplicate</span> <span>Download</span> <span>Bulk Upload</span> <span>Review</span> <span>Release</span> <span>Transfer to</span> <span>Refresh</span> <span>Print</span> <span>Export</span> <span>Transmit</span> <span>More</span>										
<input type="checkbox"/>			Document No. ▲	Rev	Disc	Sts	Title	Cat	Type	Review St
<input checked="" type="checkbox"/>			030819-001	C	ELEC	IFI	Site Plan		MAN	Un-Restra
<input type="checkbox"/>			08730003E-001.100.141-02-002-01	A	ADMIN	IFI	TRANSFORMER HOUSING CONCRE' ALL		MAN	Un-Restra
<input type="checkbox"/>			08730003E-001.100.141-02-002-02	B	CIV	IFI	TRANSFORMER HOUSING REINFORC ALL		MAN	Un-Restra
<input type="checkbox"/>			08730003E-001.100.141-02-003-01	B	CIV	IFI	TRANSFORMER HOUSING CONCRETI ALL		MAN	Un-Restra
<input type="checkbox"/>			08730003E-001.100.141-02-003-02	B	CIV	IFI	TRANSFORMER HOUSING REINFORC ALL		MAN	Un-Restra
<input type="checkbox"/>			123456	A	CP	IFI	123456		PHOTO	Un-Restra
<input type="checkbox"/>			20201703-TR-0001-AT	A	CIV	IFI	Site Plan	EXT	DRAWING	Un-Restra
<input type="checkbox"/>			4JP-060919	B	ARCH	IFI	Site Plan		DRAWING	Un-Restra
<input type="checkbox"/>			501-HCC-EXT-CIV-001	B	CIV	IFI	Civil Zip	EXT	DRAWING	Un-Restra



Need Help? ▾  
 Support Hotline: 1800 727 102

TRAINING501 - InEight Document Training Project Master

+ New ▾

**Dashboard**

Mail

Documents

Transmittals

Packages

Tasks

Published Reports

### Dashboard

Documents

16	[Empty]
1053	Drawing
32	Manual
14	Photograph
5	Register
20	Report

[More](#)

Type Discipline Status Review Status

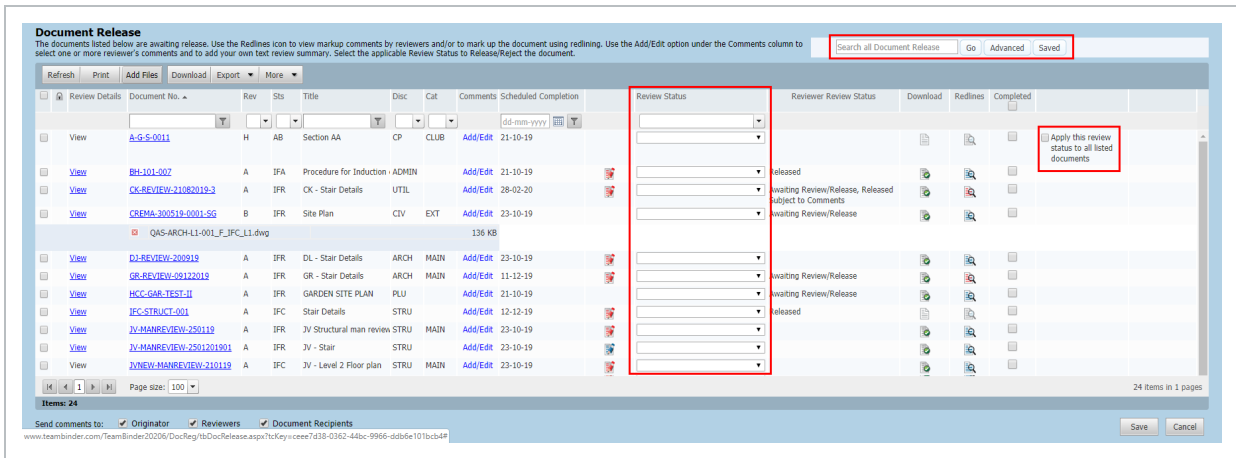
Workflow

10	To Review
24	To Release
204	All overdue reviews
30	All overdue releases
41	Uploaded with overdue reviews
10	Uploaded with overdue releases
395	Awaiting activation

24 overdue

[Less](#)

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



3. If there are many documents awaiting release, use the Search box or Advanced Document Search options to locate the required documents.
4. Allocate a **Review Status Code** as applicable to each document. Use the “Apply this review status to all listed documents” option to assign the same review status code to all documents listed.
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 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.
7. Click the **Add/Edit** button in the Comments column and enter reviewer comments as the review

coordinator.

**Review Coordinator's Comments**

OK Cancel Attach Files

Document No.: BH-101-007  
 Rev: A  
 Status: IFA  
 Title: Procedure for Induction of Staff Onsite

Review Coordinator's Comments :

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Approved

Category: -- Select a Comment Category --

[Select Reviewer comments to include with your summary](#)

Apply to all documents

8. 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. To view the redline layers made by reviewers click the Redlines icon.
9. Click **Close** when completed to return to the Review Coordinators comments window.
10. Use the **Attach files** button to select one or more external files to include as part of your Review Coordinators comments.
11. Select a **Category** if required.
12. Click **OK** to close the Review Coordinator's comments window.
13. The options "send comment to" is located at the bottom left of the Document Release screen. Options are Originator, Reviewers and Document Recipients.
14. To release the documents where the above steps have been completed, click **Save** and **No** when prompted to release other documents.

**NOTE**

- **If the document is released:** The document is distributed automatically using email notifications.
- **If the document is rejected:**
  - The originator of the document is notified that the document was rejected. Users in the same Company as the originator of the document retain access to the rejected document via the Document Register subject to the normal Discipline matrix access rules.
  - The Document Register is updated with the Review Status applied.
  - Comments made by each reviewer are stored in InEight Document.
  - The Review Coordinator cannot change any of the comments made by individual reviewers.
  - The Review Coordinator can close out comments as part of the release process.
  - 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.
  - Once released any changes to the meta-data of the document will result in the document being sent through the review process again (even if the revision or status are not changed).
  - Use the **Review Details** link to review a history of who reviewed the document and when.
  - Comments and/or Redline layers applied directly by the Review Coordinator and other reviewers selected by the Review Coordinator as part of the release process become public comments. These are visible after the document has been released via the Document Register. The other comments are private, and are not visible to users.
  - InEight Document can be configured to automatically stamp an approval signature, date and status into an image of the document (normally a Tiff file) so that the approved document when printed always contains this information. (Contact InEight for information on QPRINT if this is of interest. Charges apply).
  - A reviewed and released document can be resubmitted for review without changing the Status or Revision. Go to **More**, then **Resubmit for Review** in the Document Register.

## 5.10 Step by Step 1 — Change private comments to public

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

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

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

## 5.11 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:

1. 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.



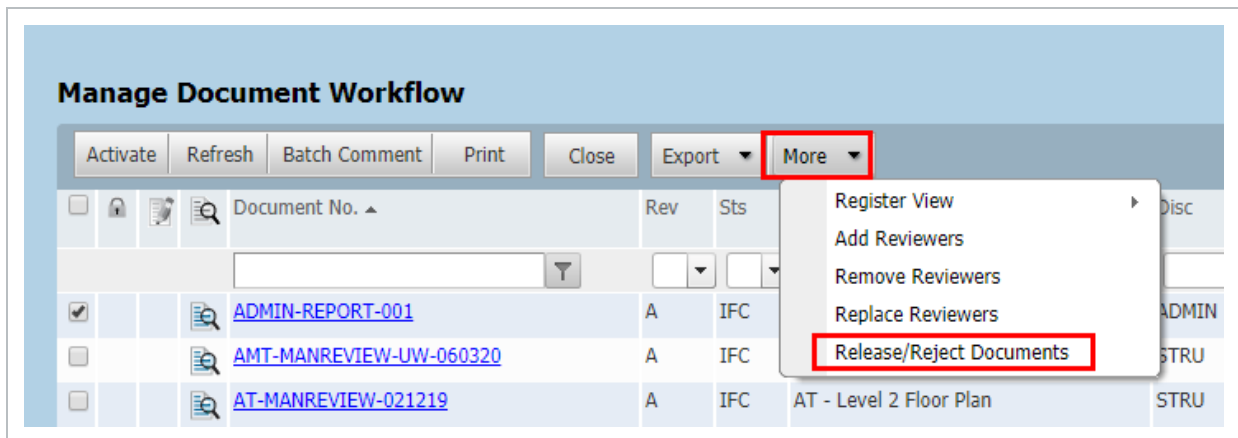
## 5.12 DOCUMENT RELEASE WITHOUT ACTIVATING A WORKFLOW

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 Document Register, go to **More**, then **Manage Document Workflow**.
2. Select the Document(s) to be Released/Rejected without activating a workflow.
3. From **More** select **Release / Reject Documents**.



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

5. Click **OK**.

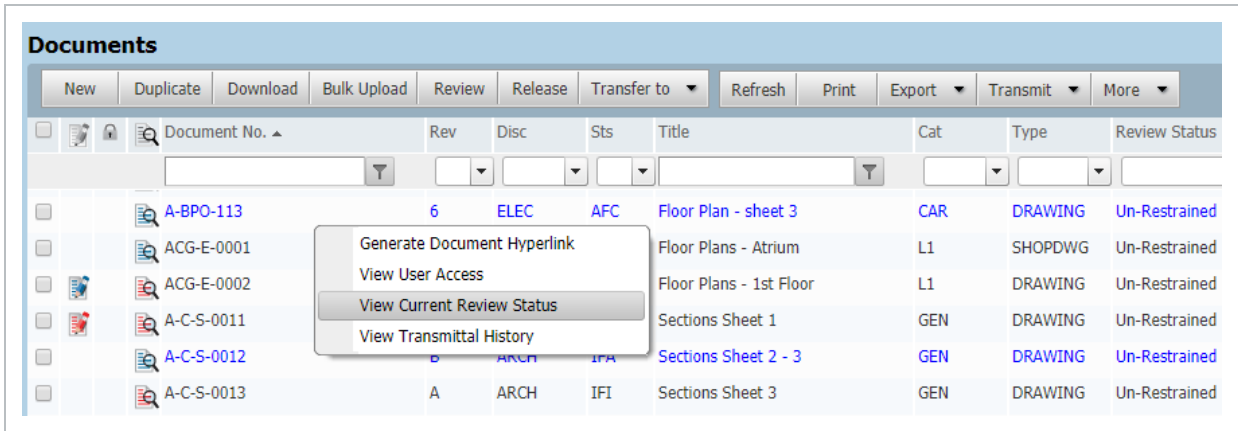
**NOTE**

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

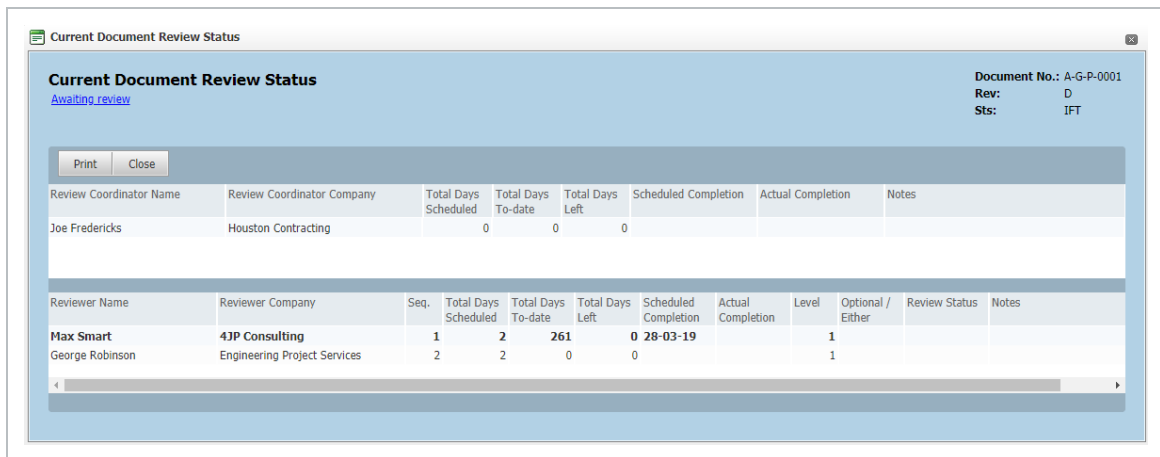
## 5.13 VIEW REVIEW STATUS

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

1. Select **Document Register** from the left menu.
2. Right click on a document and select **View Current Review Status**.



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



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

- **Total Days Left:** for completed reviews = 0, and for reviews in progress is the scheduled completion date less the system date in days.
  - **Scheduled Completion:** calculated based on the date the reviewer was notified to start their review plus the scheduled duration. This date is empty for reviewers who have not yet been notified about the review.
  - **Actual Completion:** date of review completion.
  - **Optional/Either:** if the review is classified as optional or either for the reviewer.
5. Below the list of reviewers is display a **Release Status** window that contains information similar to the above but relates to the release process rather than the review process.

**NOTE**

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