
**MOBILE APP USER
GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – INTRODUCTION TO MOBILE APPLICATION

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1.1 INEIGHT DOCUMENT MOBILE

The InEight Document Mobile Application (App) provides iPhone, iPad, and Android users with access to InEight Document at all times.

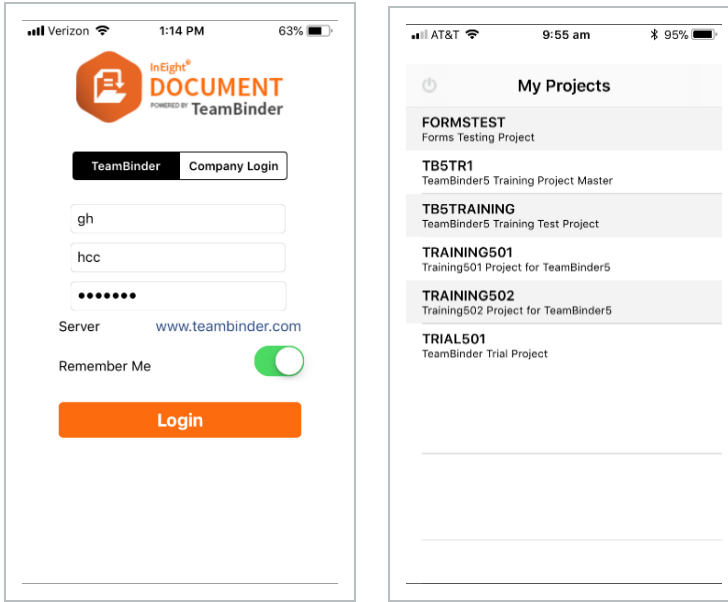
Features of this app include the ability to:

- Send and receive InEight Document Mail
- View, download, upload and send attachments and documents (e.g. MS Word, Excel, PDF and dwg) in formats supported by your mobile device
- Capture photos using your device and send immediately to other project users
- Access sent and received Transmittals
- Access downloaded content offline.

1.2 ACCESS TO INEIGHT DOCUMENT MOBILE APPLICATION

To use the InEight Document Mobile App, follow the steps below.

1. Search for 'InEight Document' within the Google Play or iTunes store. Download and install the app to your device.
2. Tap the icon once to open the application. You will be directed to the login screen.
3. Login using your standard credentials, choose the appropriate server (e.g. www.teambinder.com) and tap Login.
4. Choose the appropriate project (if required).



5. If there is offline data associated with your account (created when there was no online access), you will be prompted to upload it to InEight Document at this time and notified when upload has been completed.

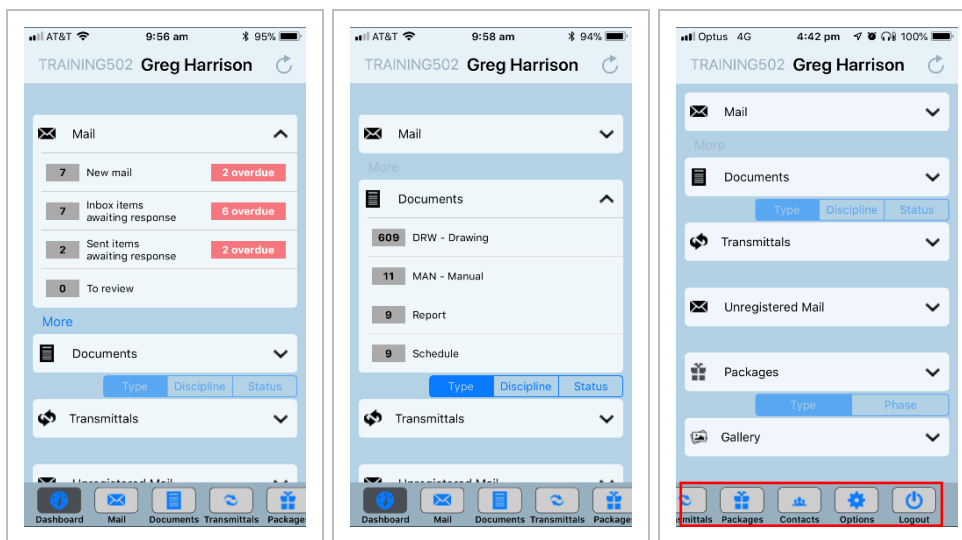
NOTE

If you cannot remember your password, tap the **Forgot your password** link, and then enter your User and Company ID, and your email address to request a new password.

CHAPTER 2 – USING THE MOBILE APP DASHBOARD

2.1 MOBILE DASHBOARD

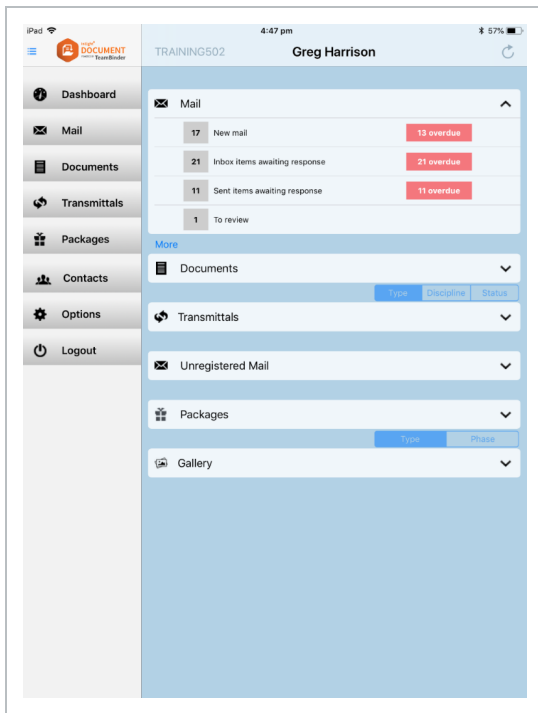
There are now three main areas to the InEight Document Mobile App Dashboard as shown below, the top menu, base menu and the widget area. Navigate between each area by tapping on the icons.



Dashboard Area	Description
Top Menu	Menu options at the top of the Dashboard include: <ul style="list-style-type: none"> • Project Selection – tap the project number in the top left of the screen to change between projects you have access to. • Refresh – found on the top right of the screen, this can be used to refresh the statistics for all active modules.
Base Menu	Use to navigate between the Dashboard and all available modules. Scroll left to see additional modules as well as Contacts, Options and the Logout option.
Widget Area	Displays key project statistics grouped by module with links to the relevant data. Some of the key groups are:

Dashboard Area	Description
	<ul style="list-style-type: none"> • Mail – Number of New Mail, Outstanding Mail etc. • Documents – Information on the number of documents you have access to in the Document Register by Type, Discipline or Status. • Transmittals – Number of Transmittals sent, received, pending review and returned from review. • Packages – Number of packages available <p>Each widget area can be expanded or minimised using the top right arrow symbol in the widget header.</p>

If you are using an iPad, the screen more closely resembles the standard InEight Document view, with the modules presented in the left hand menu.

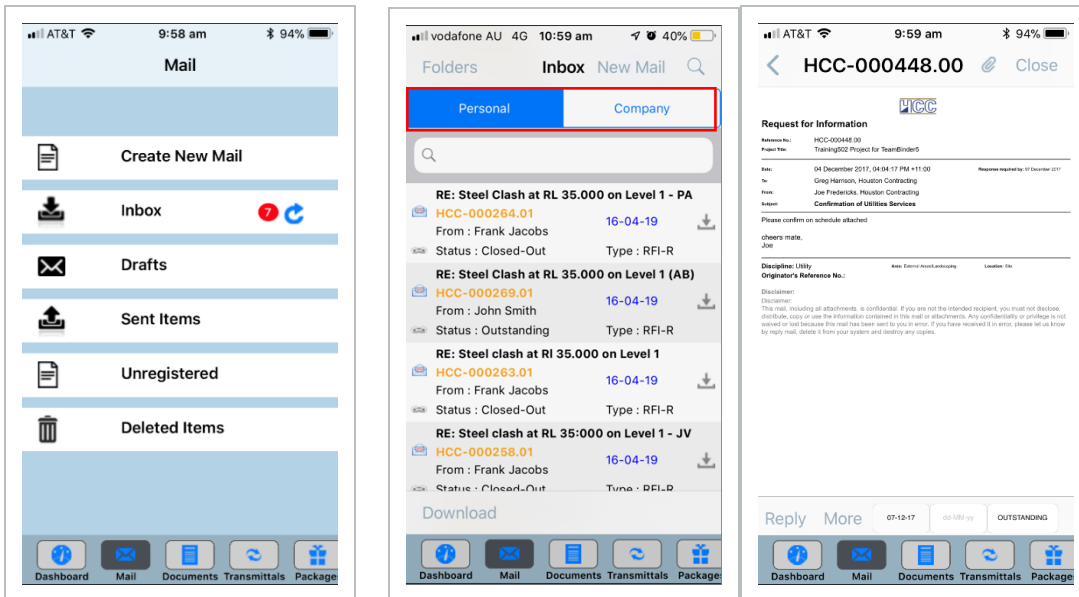


CHAPTER 3 – INEIGHT DOCUMENT MOBILE MAIL

InEight Document’s mail module provides easy viewing of project correspondence with key details and information provided for the user, including dates, mail types and a subject.

3.1 NAVIGATING MOBILE MAIL

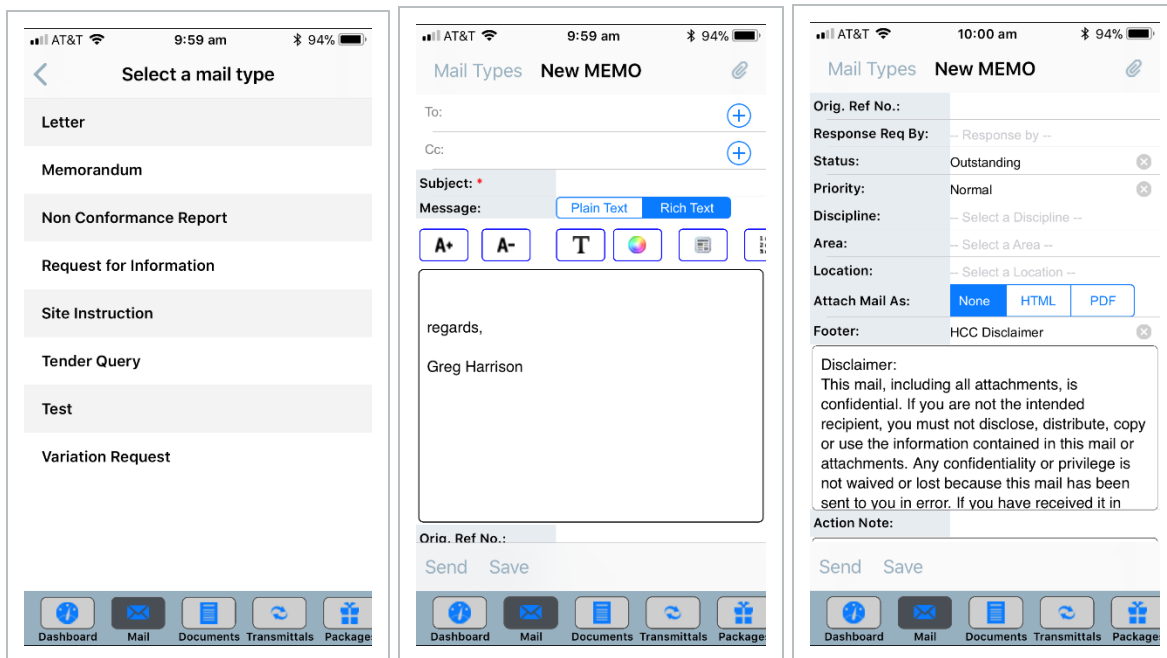
1. From the Dashboard, select **Mail** from the base menu. This opens up the Mail menu which includes all the mail registers as well as the option to create new mail.
2. To view mail, tap the relevant mailbox (e.g. Inbox) and then tap the mail you wish to view. If a user has access to company mail, then the Personal/Company toggle will appear at the top.



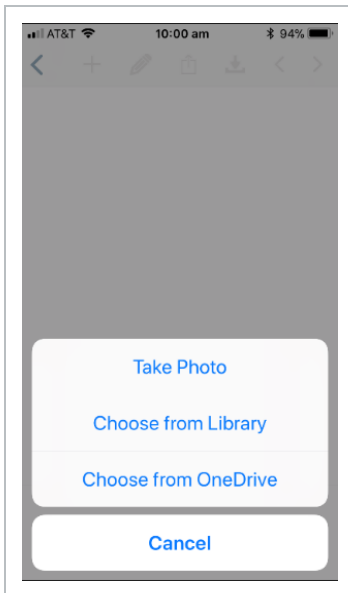
3. To search for mail, use the quick search bar to enter simple search terms (eg ‘soil’), or select the magnifying glass icon in the top right corner to use your default search or do an advanced search.

3.2 CREATING NEW MAIL

1. From the Dashboard, select **Mail** from the base menu, then select **Create New Mail**.
2. Choose the required mail type (e.g. Memorandum).
3. Start typing the contact names into the 'To' and 'CC' fields as required. A list of contacts will be provided. Alternatively, you can use the plus icon on the right to select contacts by Company.
4. Enter message details and choose whether the message format will be Plain or Rich Text.



5. Select all other required fields (such as Discipline, priority and Area).
6. To add photo or file attachments, tap the paper clip icon in the top right corner and select **Take Photo** or **Choose from Library**. See the section below on how to mark up attachments before sending mail.



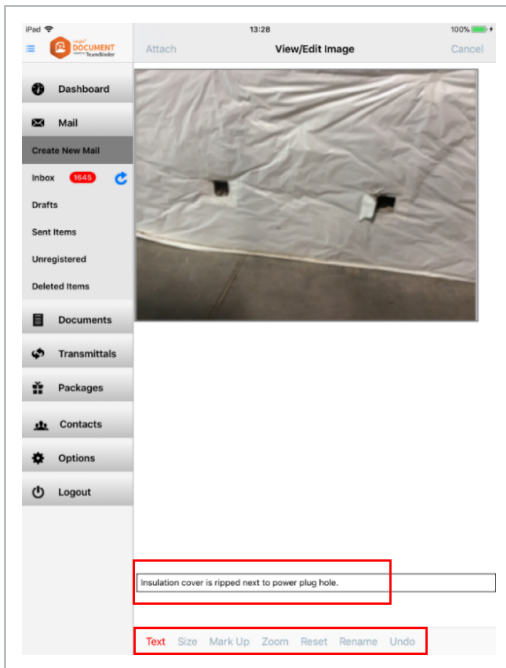
7. Tap **Save** to save the mail as a draft, or press **Send**. This will bring the option to Send, Send for Review or to Send and Close-Out.

3.3 ATTACHING PHOTOS USING THE IN-BUILT CAMERA

It is possible to use your mobile devices built in camera within InEight Document Mobile, to take a photo and mark it up before attaching to mail. This feature can also be used when uploading a document to the InEight Document Mobile Document Register or to mark-up drawings or photos already stored on your device.

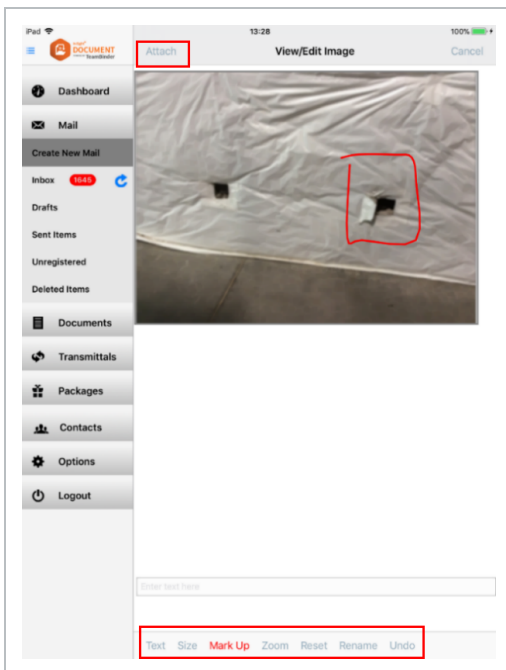
1. From the mail compose screen tap the paper clip icon in the top right corner and choose **Take Photo** then **OK**. You can edit the image before attaching to the mail.

2. Select **Text** to record text on the photo.

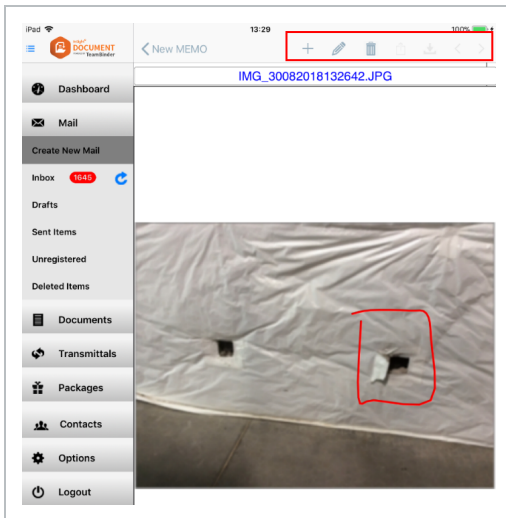


3. Tap Size to select the font size for the text.

4. **Mark Up** allows you to mark up the drawing by hand.



5. **Zoom** allows you to pinch the screen to zoom in and out on the photo.
6. **Reset** will remove all mark ups you have made (if required).
7. Once complete, select **Attach** in the top left corner to attach it to mail.
8. Select the plus icon from the top menu to add an additional file or photo to the mail, the pencil icon to continue editing the attachment, the trash icon to remove the attachment, the up arrow icon to share/send or the down arrow icon to download.



9. Select **Back** to return to the mail message.

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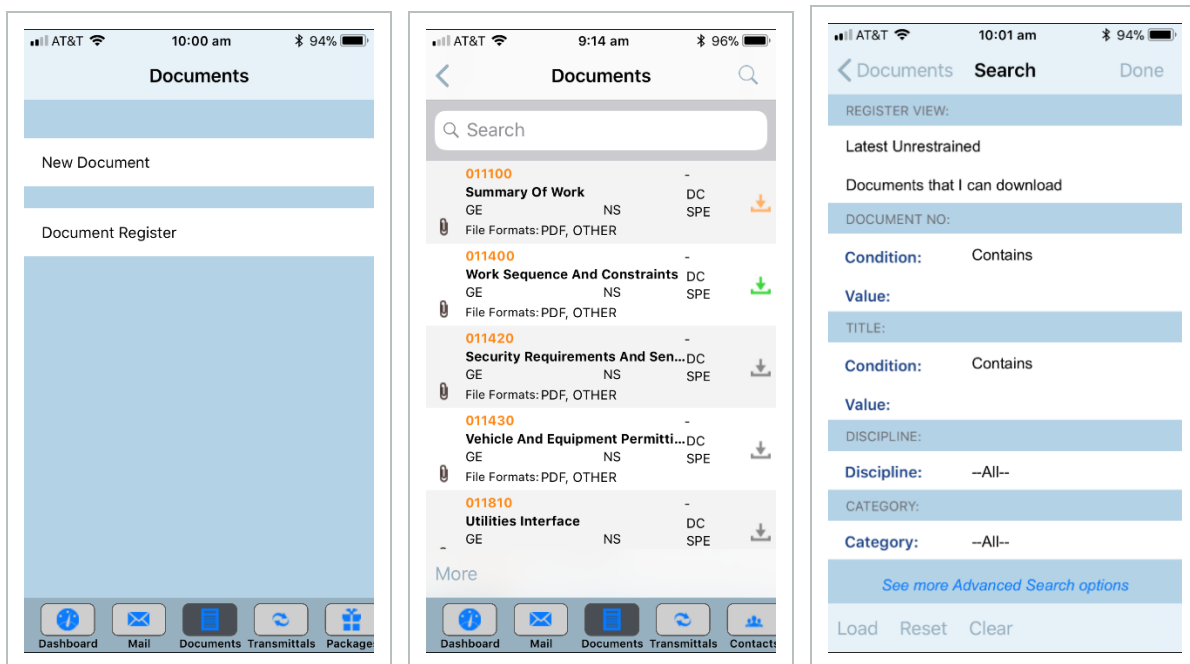
CHAPTER 4 – INEIGHT DOCUMENT MOBILE DOCUMENTS

The InEight Document Mobile Documents Module provides access to the InEight Document Documents Register, as well as the ability to create InEight Document documents.

4.1 INEIGHT DOCUMENT MOBILE DOCUMENT REGISTER

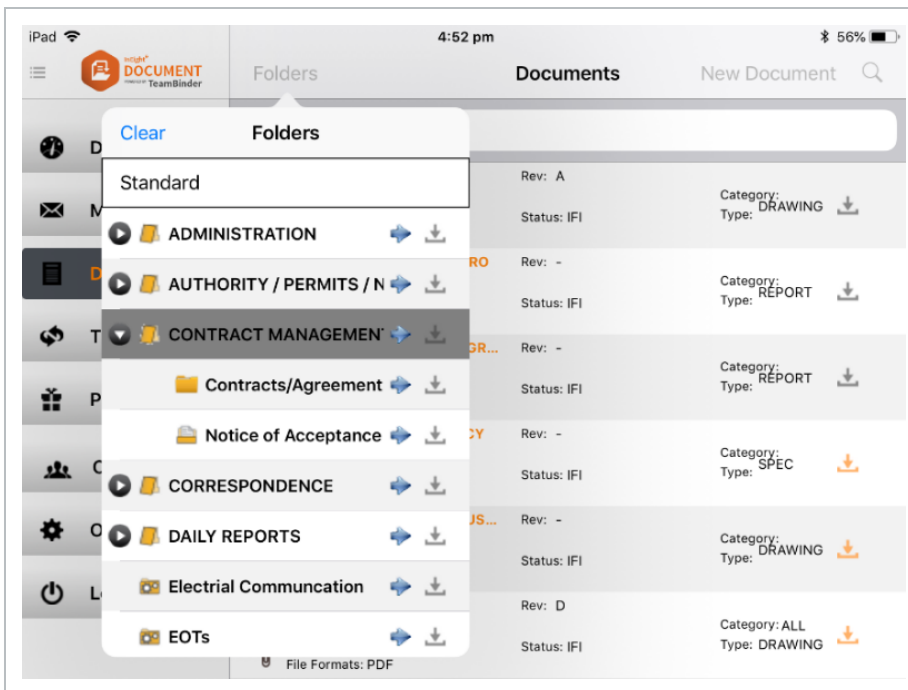
To view or download documents, follow these steps.

1. From the Dashboard, select **Documents** from the base menu, then **Document Register**.
2. To view existing documents, tap the **Document Register**.



3. Tap on a document to view the document details or select the download icon on the right to download.
4. The colour of this icon relates to the download status:
 - Grey: has not been downloaded. You can only see that the item exists in the register.
 - Orange: Only the document metadata has been downloaded.

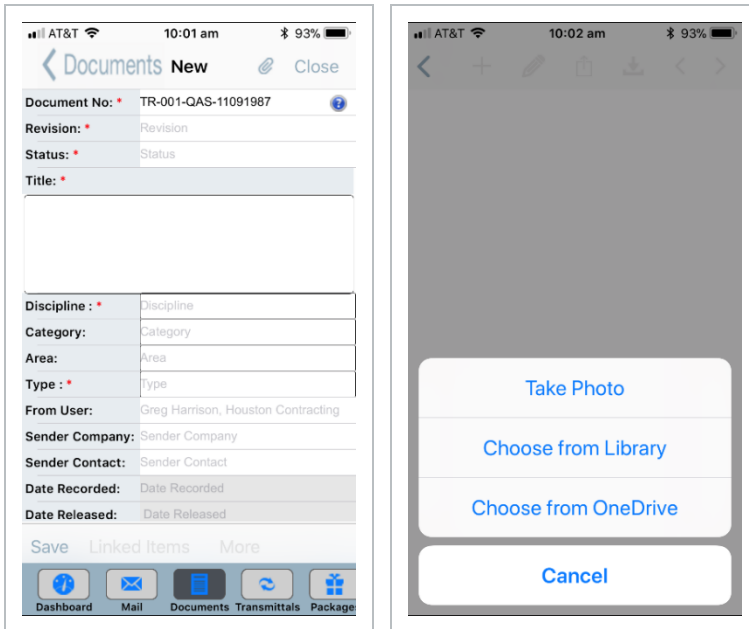
- Green: Document has been downloaded to device.
- To search for documents, use the quick search bar to enter simple search terms (eg 'foyer'), or select the magnifying glass icon in the top right corner to use your default search or do an advanced search.
 - Use the **More** option in the lower left menu to check documents in or out or download selected documents in bulk.
 - Use the **Folders** option in the top left (iPad) menu to view documents by folder. Click the Download icon to make a folder available offline.



4.2 CREATING NEW DOCUMENTS

- From the Dashboard, select **Documents** from the base menu, then select **New Document**.

2. Enter all the required document details.



3. To add a photo or file, tap the paper clip icon in the top right corner and select **Take Photo** or **Choose from Library**.
4. Click **Save** to upload the document into InEight Document.

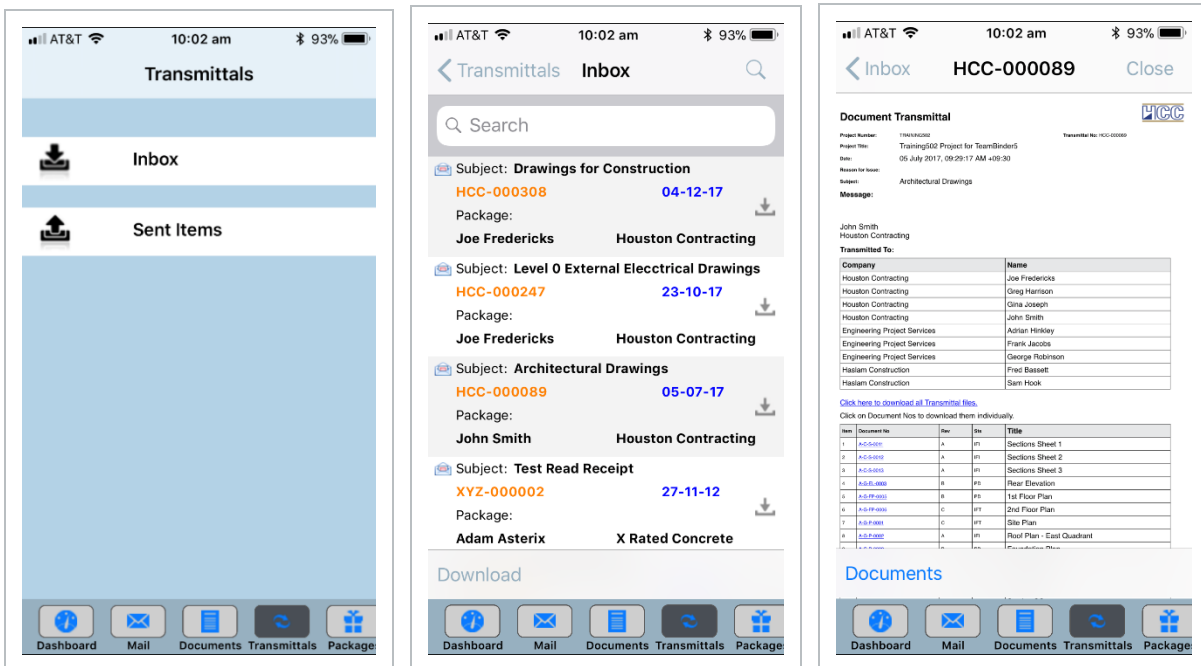
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CHAPTER 5 – INEIGHT DOCUMENT MOBILE TRANSMITTALS

The InEight Document Mobile Transmittal Module provides access to the Transmittal Inbox and Sent Items.

5.1 NAVIGATING MOBILE TRANSMITTALS

1. From the Dashboard, select **Transmittals** from the base menu. This opens up the Transmittals menu which includes both the Inbox and Sent Items.



2. To view Transmittals, tap on the relevant mailbox (e.g. Inbox) and then tap the Transmittal you wish to view.
3. To search for Transmittals, use the quick search bar to enter simple search terms (eg 'Bridge'), or select the magnifying glass icon in the top right corner to use your default search or do an advanced search.
4. To download Transmittal documents to your device and make them available offline, from the register view, tap the download icon on the right.

NOTE

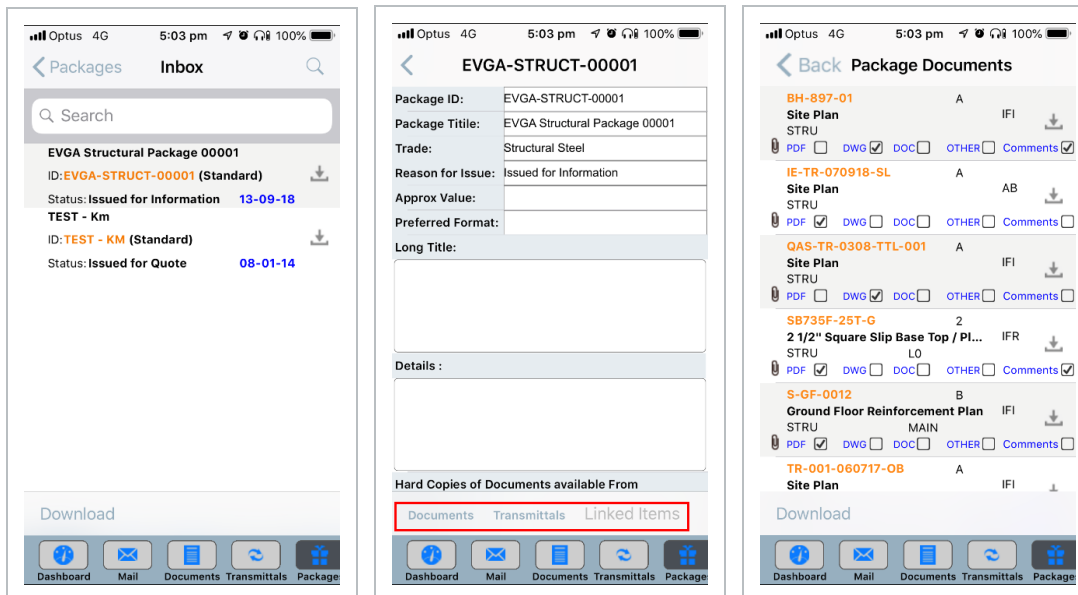
With Transmittals, you can see if the file has actually been downloaded to the device by selecting the transmittal then Documents. It will indicate downloaded files in green.

CHAPTER 6 – INEIGHT DOCUMENT MOBILE PACKAGES

The InEight Document Mobile Packages Module provides access to the Packages Inbox, Drafts and Sent Items.

6.1 NAVIGATING MOBILE PACKAGES

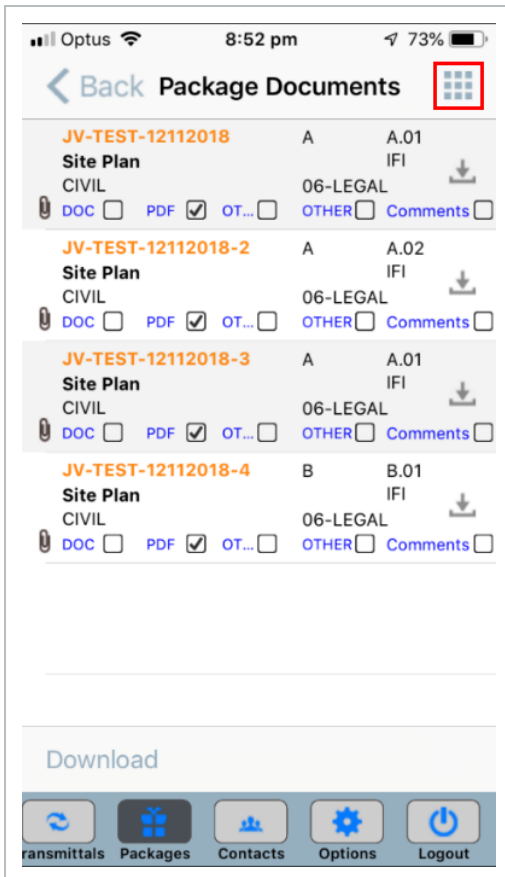
1. From the Dashboard, select **Packages** by scrolling left from the base menu. This opens up the Packages menu which includes the Inbox, Drafts and Sent Items.



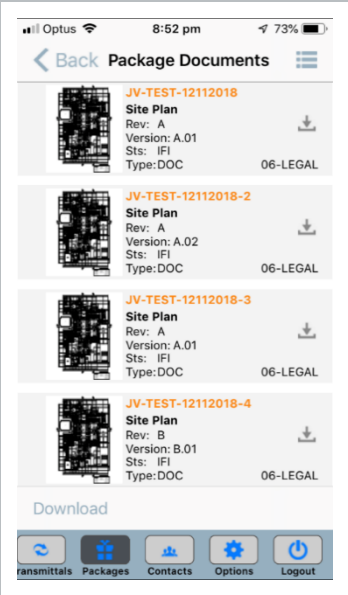
2. To view Packages, tap on the relevant mailbox (e.g. Inbox) and then tap the Package you wish to view.
3. Select **Documents**, **Transmittals** or **Linked Items** below the package details to view and download items (to make them available offline).
4. To search for Packages, use the quick search bar to enter simple search terms (eg 'Earthworks'), or select the magnifying glass icon in the top right corner to use your default search or do an advanced search.
5. To download Package documents to your device and make them available offline, from the

register view tap the download icon on the right.

- It is also possible to view packages as a thumbnail by clicking the Thumbnail icon (please contact InEight support to enable this feature). To view this **Click Packages > Sent Items (or Inbox) > Package (from the register) > Documents**



- This will load (for PDF files) a thumbnail of each Document.



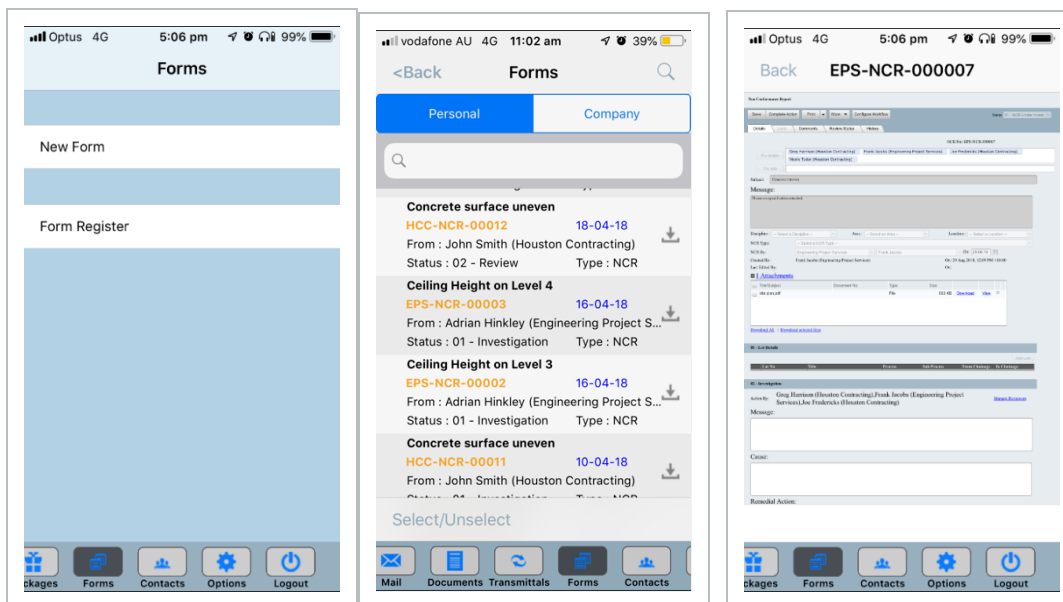
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CHAPTER 7 – INEIGHT DOCUMENT MOBILE FORMS

The InEight Document Mobile Forms Module provides the ability to create new forms and access the Form Register.

7.1 NAVIGATING MOBILE FORMS

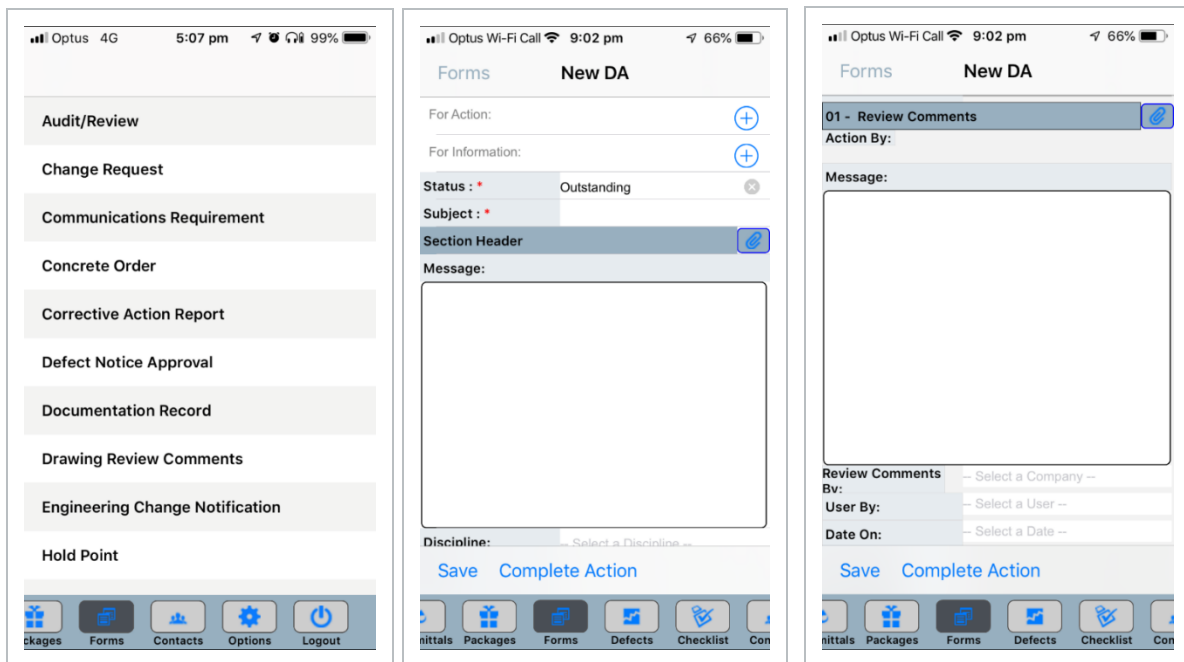
1. From the Dashboard, select **Forms** by scrolling left from the base menu. This opens up the Forms menu which includes the New Form option and the Forms Register.



2. Tap the Form you wish to view. If a user has access to company forms, then the Personal/Company toggle will appear at the top.
3. To search for Forms, use the quick search bar to enter simple search terms (eg 'Steel'), or select the magnifying glass icon in the top right corner to use your default search or do an advanced search.
4. To update a Form select it and update it as you would do so using desktop InEight Document.

7.2 CREATING NEW FORMS

1. From the Dashboard, select **Forms** from the base menu, then select **New Form**.
2. Select the form type (e.g. Hold Point).
3. Enter all the required details as per InEight Document desktop. Some forms may look different depending on whether they have been optimised for Mobile or not.



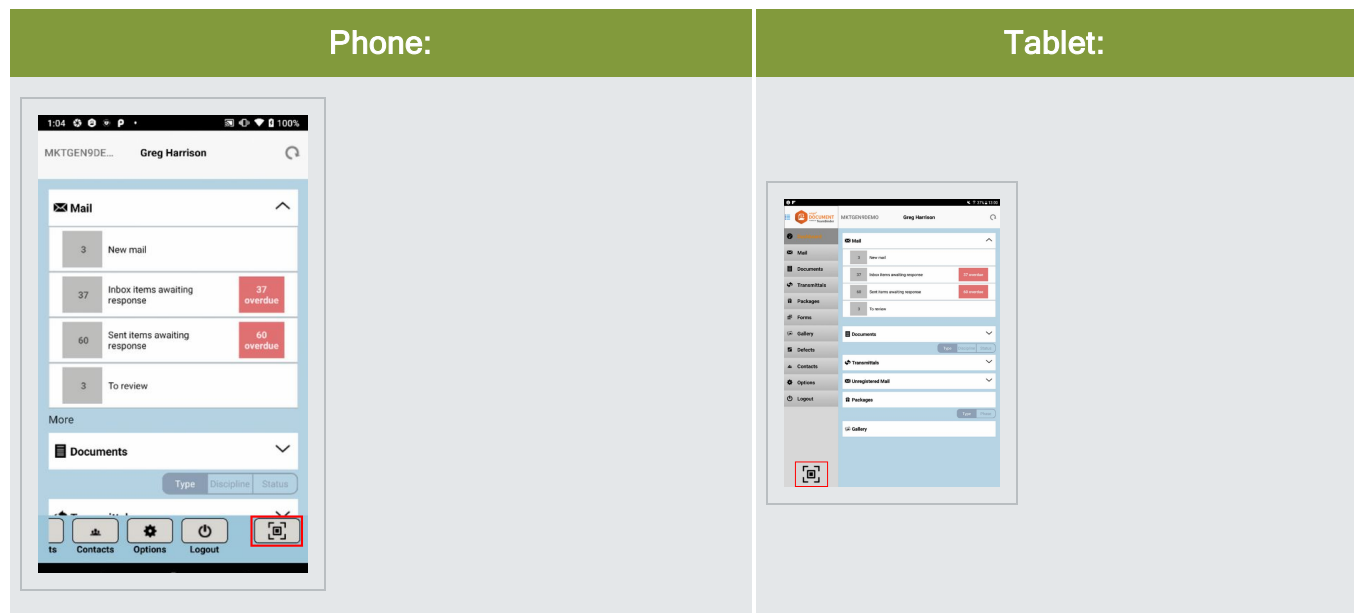
4. To add a photo or file, tap the **Attach Files** option and choose an item from your device.
5. Select **Complete Action** to send.

CHAPTER 8 – INEIGHT DOCUMENT QR CODE SCANNER

It is now easy to scan the QR codes in Document and the Defects module by using the QR code reader in our mobile application.

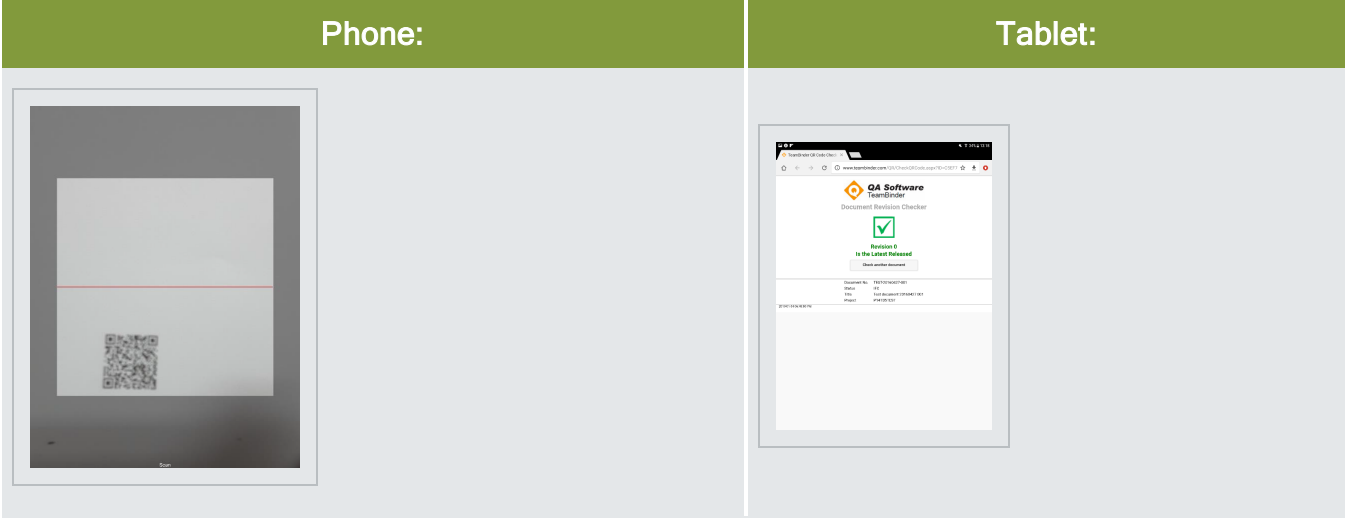
8.1 USING QR CODE SCANNER

The new QR scanner can be found in these locations:



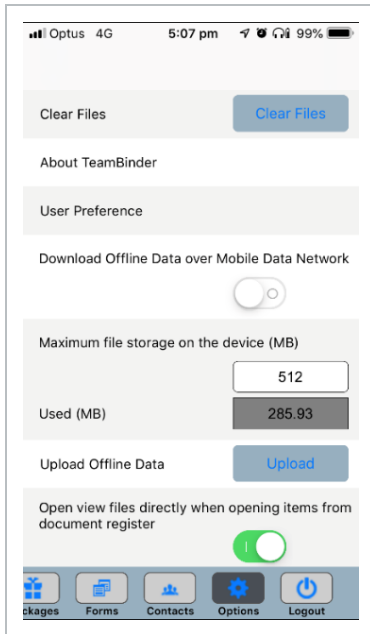
Open the scanner, focus on the QR Code and Click **Scan**.

The QR Code scan results are then displayed.



CHAPTER 9 – INEIGHT DOCUMENT OPTIONS

To access Options, from the Dashboard, select **Options** by scrolling left from the base menu.

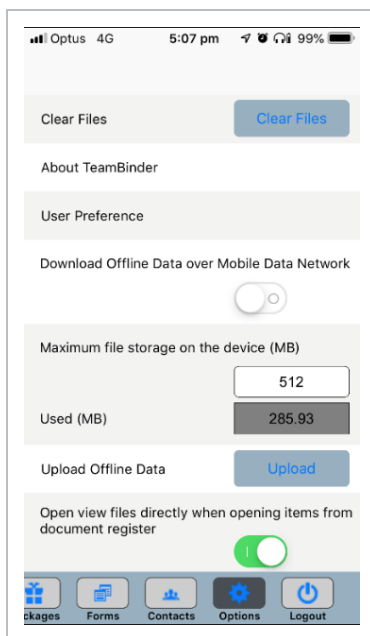


Options Area	Description
Clear Files	Deletes downloaded files and clears all offline data.
About InEight Document	Provides version app details.
User Preferences	Option to adjust the maximum number of records to be downloaded and shows the time and date of last download.
Download Offline Data	Option to turn on ability to download offline data over Mobile Data Network (instead of Wi-Fi). Not active by default.
Maximum File Storage	Update to set maximum file storage limit on device (MB).
Used (MB)	Total device storage currently used

Options Area	Description
Upload Offline Data	Select Upload to upload data created offline into InEight Document (once an internet connection is available).
Open View Files	Turning on this feature enables users to open view files directly when selecting documents from the register.

9.1 INEIGHT DOCUMENT OPTIONS

To access Options, from the Dashboard, select **Options** by scrolling left from the base menu.



Options Area	Description
Clear Files	Deletes downloaded files and clears all offline data.
About InEight Document	Provides version app details.
User Preferences	Option to adjust the maximum number of records to be downloaded and shows the time and date of last download.
Download Offline Data	Option to turn on ability to download offline data over Mobile Data Network (instead of Wi-Fi). Not active by default.

Options Area	Description
Maximum File Storage	Update to set maximum file storage limit on device (MB).
Used (MB)	Total device storage currently used
Upload Offline Data	Select Upload to upload data created offline into InEight Document (once an internet connection is available).
Open View Files	Turning on this feature enables users to open view files directly when selecting documents from the register.
