

QUICK GUIDE

GETTING STARTED



REGISTER OVERVIEW

Callouts in the screenshot include: Main Menu, New Menu, Module Menu, Advanced Search Filters (A), Quick Launch Bar, User Preferences and Help (B), Manage Filters, Mail View, Folder view, Filter/Sort, Show: Personal, Search all Inbox (Quick Search), and Column Filter.

| | Type | Mail ref. | Received | Date read | Subject |
|--|------|------------------------------|-------------------|-------------------|------------------|
| | MEM | BC-MEM-0003 | 08-12-21 04:48 PM | 08-12-21 04:49 PM | Business in repo |
| | RFI | CC-RFI-0002 | 02-12-21 04:58 PM | 02-12-21 05:01 PM | |
| | LET | CLC-LET-0003 | 01-12-21 05:18 PM | 02-12-21 04:52 PM | Anticipated conc |

A ADVANCED SEARCH FILTERS

Use **Filter/Sort** to apply multiple filters to your search.

The Filter/Sort dialog shows various search criteria including Show (Personal), Received (All mail, New mail, Outstanding mail), To, From, Attachment, and Attachment name. It also includes a section for filtering by Column, Operator, and Value.

B USER PREFERENCES AND HELP

Manage user preferences and get help with these menu items.

The User Preferences menu includes: PROFILE, User preferences, Change password, Manage login profile, Two factor authentication, and Sign out. The Help menu includes: HELP, InEight Document help, Frequently asked questions, Training videos, Additional applications, Latest release notes, InEight University, About, and Support hotline: 1800 727 102.

REPORTING

To run reports, click **Module Menu** ▶ **Reports**.

The Standard Reports menu lists the following items: 01. Address Book, 02. Administration, 04. Document Register, 05. Transmittals, 07. Document Workflow, and 10. Mail.

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LOGIN

1. Type in <https://au1.doc.ineight.com> or the alternative URL for your project.

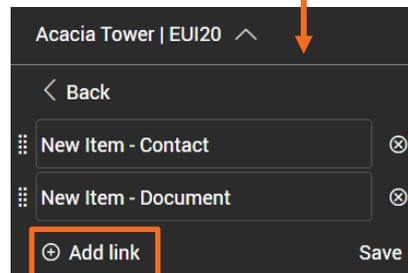
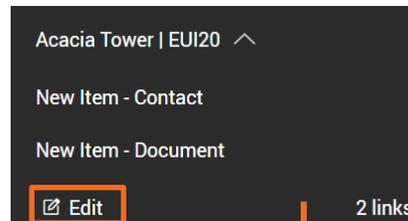
2. Enter your user ID, company ID and password then **Login**.
3. Click **Forgot your password?** to request a new one.

ADD AN EMAIL SIGNATURE

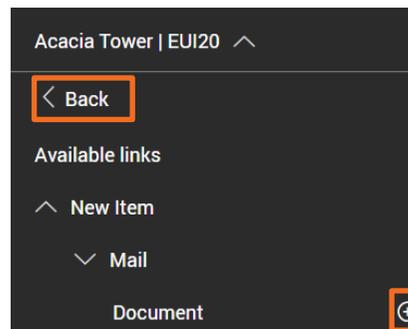
1. In the top right corner, click on the icon.
2. Select **User Preferences** ► **General**.

ADD QUICK LAUNCH LINKS

1. To add links to favorite actions or functions click **Edit** ► **Add link**.



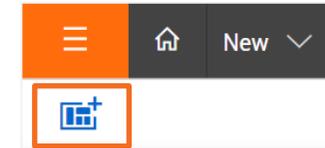
2. Click next to the new links you want to add, then click **Back**.



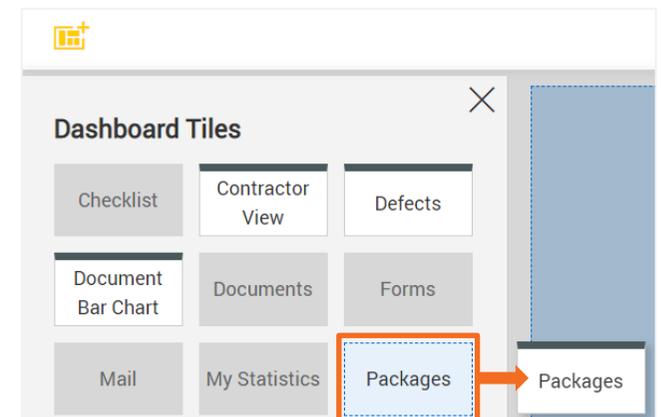
3. Update the name of the links if desired and click **Save**.

CUSTOMIZE DASHBOARD TILES

1. From the Dashboard, click the tile icon.



2. Drag and drop the **module tile** into the Dashboard.



NEED SOME MORE HELP?



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