

What's New in InEight Document



19.2 Release

This release includes integrations with DocuSign and Word as well as enhancements to security for Documents and Checklists. The integrations will provide more flexibility with other project tools and improved access options to ensure data security.

New

Please contact your InEight account representative if you are interested in these items, which can be enabled on your project.

- **DocuSign Integration** – This enables project teams to select Documents and send a request for signatures. Once the request has been initiated, the status can be tracked from the register. This provides flexibility and simplification to project teams if DocuSign is the standard for digital signatures. [Read more](#)
- **Word Integration** – Files can now be directly opened in Word from the Document register. Combined with the existing Office integration, files can then be easily uploaded back into the project with the necessary changes from Word. [Read more](#)
- **Document Drive** – Document Drive lets project teams quickly and easily access their InEight Document content, such as Documents, Published Reports and Gallery, through either the standalone application or the Windows Explorer interface. [Read more](#)

Improvements

- **Documents**
 - **Restricted Documents** – Sensitive documents can be hard to manage, requiring special clearances for access. This functionality lets administrators define which Documents are restricted from the typical project configured access and security, and which users are authorized to view them. Once defined, those documents cannot be transmitted to unauthorized users. Please contact support@ineight.com if you are interested in enabling this on your project. [Read more](#)
 - **Delegate Review** – Project members often need to get additional input or assign to someone else during the review process. This feature gives the option to delegate to another reviewer in parallel to, or as a replacement for, the current reviewer. [Read more](#)
 - **Status Indicator and Lock for Bluebeam Studio Reviews** – The new indicator and lock prevents your team from prematurely consolidating comments, ensuring that comments have been transferred fully between systems first. [Read more](#)
- **Checklists**
 - **Restrict Verifiers based on Checklist Type** – Checklists are fundamental for QA processes on your projects. Specific individuals are often qualified to do final verification on checklists. This enhancement lets your project administrators define who those individuals are to ensure each and every list is properly verified. Please contact your InEight account representative if you are interested in enabling this on your project. [Read more](#)
 - **Checklist History Print Template** – This feature enables a new template for printing the history with checklist items. The print template is useful when you need to document

the checklist participants, especially the verifier. This new print template can be used, in some cases, to meet certification requirements. [Read more](#)

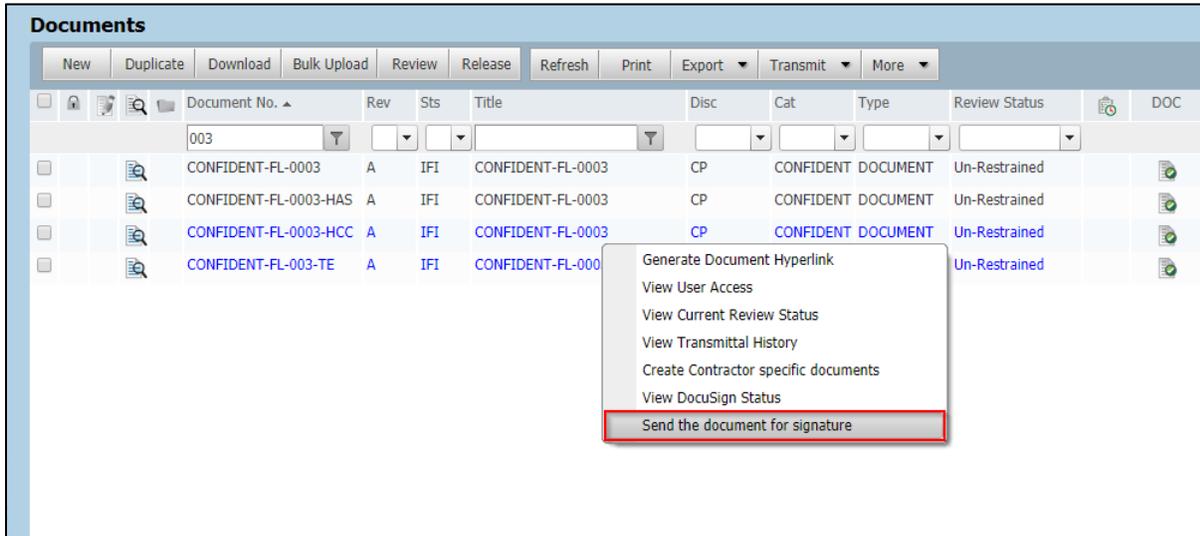
- **Defects**

- **Images within Reports** – In Defect reports, images are now included to give the project team better clarity and context when reviewing the associated items. [Read more](#)
- **Custom Numbering** – Custom numbering schemes can now be applied to the Defects module like Documents, Forms, Mail, etc. Please contact support@ineight.com if you are interested in enabling this on your project.

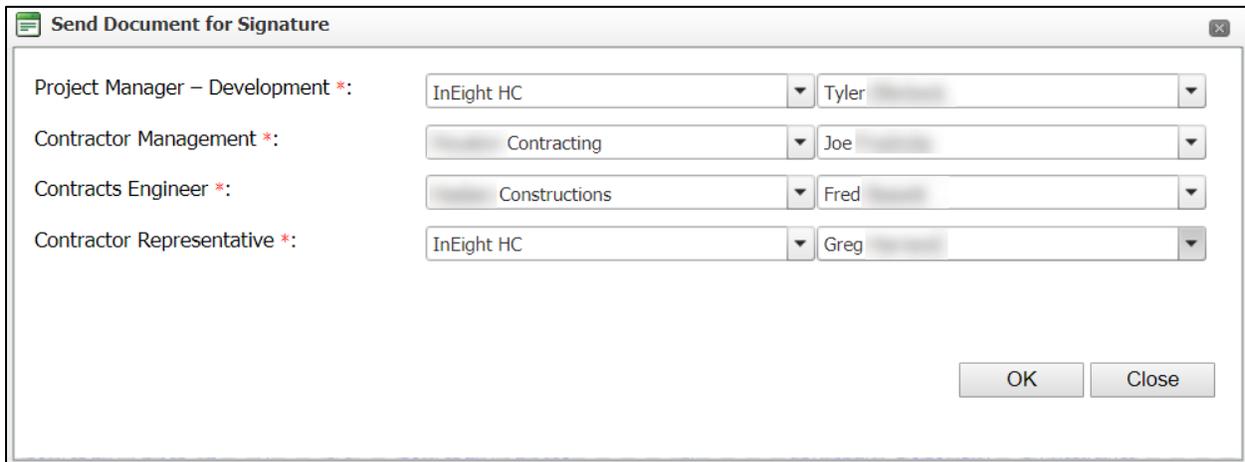
New

DocuSign Integration

Right-click the Document and select **Send the document for signature**.



Select users for the defined roles and select **OK**.



Once the Document has been sent for a signature, right-click the document and select **View DocuSign Status**.

Documents

New Duplicate Download Bulk Upload Review Release Refresh Print Export Transmit More

Document No.	Rev	Sts	Title	Disc	Cat	Type	Review Status	DOC
003								
CONFIDENT-FL-0003	A	IFI	CONFIDENT-FL-0003	CP	CONFIDENT DOCUMENT	Un-Restrained		
CONFIDENT-FL-0003-HAS	A	IFI	CONFIDENT-FL-0003	CP	CONFIDENT DOCUMENT	Un-Restrained		
CONFIDENT-FL-0003-HCC	A	IFI	CONFIDENT-FL-0003	CP	CONFIDENT DOCUMENT	Un-Restrained		
CONFIDENT-FL-003-TE	A	IFI	CONFIDENT-FL-0003	CP	CONFIDENT DOCUMENT	Un-Restrained		

- Generate Document Hyperlink
- View User Access
- View Current Review Status
- View Transmittal History
- Create Contractor specific documents
- View DocuSign Status**
- Send the document for signature

DocuSign Status

Document No.: CONFIDENT-FL-0003-HCC
 Rev: A
 Sts: IFI

In-Progress

Print Close

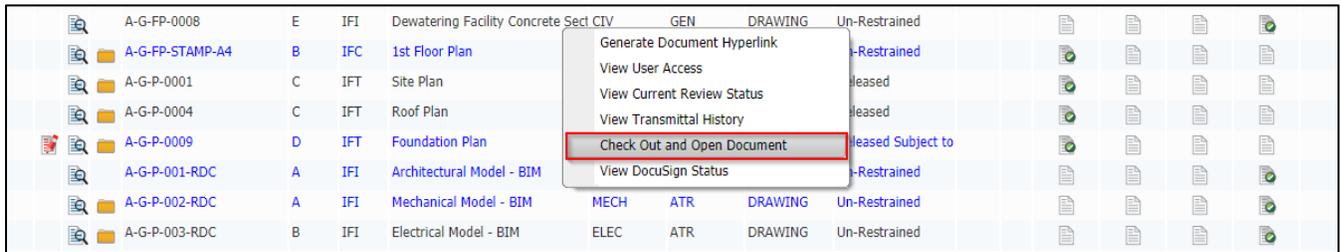
Company	Name	DocuSign Status
InEight HC	Glenn	sent
InEight HC	Damian	completed
InEight HC	Greg	sent
InEight HC	Fred	sent

NOTE: Customers who send requests for signatures need to have licensing with DocuSign.

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Word Integration

From the Documents register, you can right-click a Word file and click **Check Out and Open Document**.



	A-G-FP-0008	E	IFI	Dewatering Facility Concrete Sect CIV	GEN	DRAWING	Un-Restrained					
	A-G-FP-STAMP-A4	B	IFC	1st Floor Plan			-Restrained					
	A-G-P-0001	C	IFT	Site Plan			leased					
	A-G-P-0004	C	IFT	Roof Plan			leased					
	A-G-P-0009	D	IFT	Foundation Plan			leased Subject to					
	A-G-P-001-RDC	A	IFI	Architectural Model - BIM	MECH	ATR	DRAWING	Un-Restrained				
	A-G-P-002-RDC	A	IFI	Mechanical Model - BIM	ELEC	ATR	DRAWING	Un-Restrained				
	A-G-P-003-RDC	B	IFI	Electrical Model - BIM				Un-Restrained				

A context menu is open over the '1st Floor Plan' file, with the following options: Generate Document Hyperlink, View User Access, View Current Review Status, View Transmittal History, **Check Out and Open Document** (highlighted with a red box), and View DocuSign Status.

Once you have made changes in Word, you can upload the file into the register through the existing Office Integration. In Word, from the **TeamBinder** tab, select **Upload**. The standard upload screen appears with the updated file and appropriate data populated.



NOTE: This feature requires an existing Office integration

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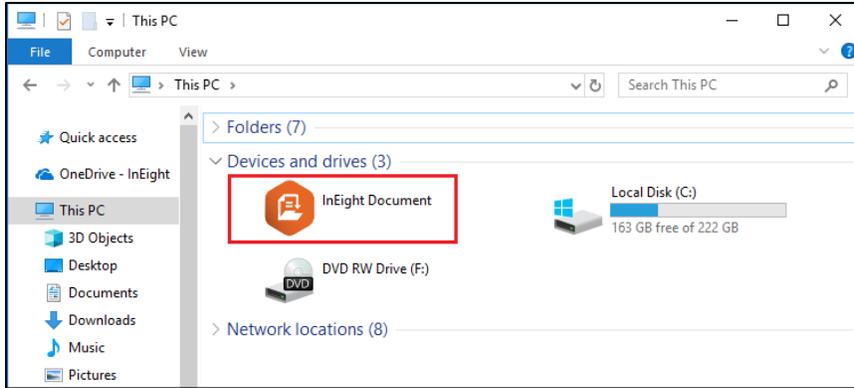
Document Drive

Document Drive lets project teams quickly and easily access their InEight Document content, such as Documents, Published Reports, and Gallery, through either the standalone application or the Windows File Explorer interface.

The standalone application provides integration with OneDrive and the Windows File Explorer version provides the familiar interface for users.

Windows File Explorer version

Document Drive appears as a new drive in File Explorer.



Synced Projects appear as folders.

Name	Type	Server Name
MKTGEN36DEMO	Project	demo.teambinder.com
MKTGEN55DEMO	Project	demo.teambinder.com

Documents, Published Reports and Gallery are available with system metadata.

Name	Type
Document	Module
Gallery	Module
Published Reports	Module

Standalone Application

InEight DOCUMENT
POWERED BY Teambinder

MKTGEN36DEMO - Teambinder 5 Demonstration Project - TE

Projects Settings

Document Gallery Published Reports

TeamBinder 5 Demonstration Project

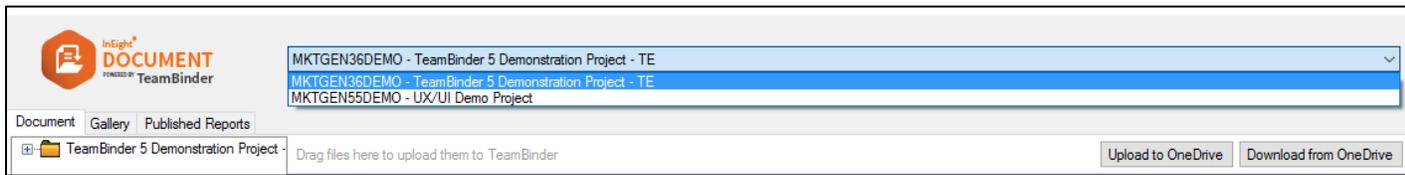
- 01 Corporate Structure
- 02 Operations & Maintenance
- 02 Operations & Maintenance
- 03 Services
- ADMINISTRATION
- AUTHORITY / PERMITS / NEIG
- Block D - Level 2
- CONTRACT MANAGEMENT INF
- DESIGN PACKAGES
- DRAWINGS
- FINANCIAL
- Follow Up List
- LEGAL
- LEGAL
- MAIL
- O&M MANUALS
- OCCUPATIONAL HEALTH & SAF
- PLANT
- PROJECT MANAGEMENT
- QUALITY & COMPLETION
- REPORTS
- REPORTS - DAILY
- SUBCONTRACTORS / SUPPLIE
- Test123

Drag files here to upload them to Teambinder

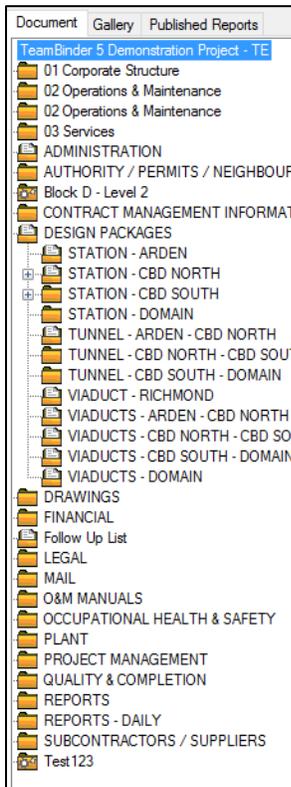
Upload to OneDrive Download from OneDrive New Refresh

Document No	Revision	Status	Title	Discipline	Category
A-G-C-0001	B	IFI	L1 Concrete Specification	ARCH	ATR
A-G-C-0002	B	IFI	P&ID - Ultra Filtration	MECH	GEN
A-G-D-0001	D	IFT	Roof Design Details	ARCH	CLUB
A-G-EL-0002	F	IFR	Front Elevation	ARCH	CLUB
A-G-EL-0003	F	IFI	Rear Elevation	ARCH	CLUB
A-G-EZY-EL-0003	B	IFC	Rear Elevation	ARCH	CLUB
A-G-FA-000-RDC	A	IFI	Level 1 Concrete Specs	ARCH	L1
A-G-FA-001-RDC	A	IFI	Clubhouse Staircase Plans	ARCH	CLUB
A-G-FA-002-RDC	A	IFI	Clubhouse Roof Plans	ARCH	CLUB
A-G-FA-003-RDC	2	IFC	2 1/2 Inch Square Base Plate	STRU	L0
A-G-FP-0005	D	IFT	1st Floor Plan	ARCH	CLUB
A-G-FP-0006	D	IFT	2nd Floor Plan	ARCH	CLUB
A-G-FP-0008	E	IFI	Dewatering Facility Concrete Sections - Sheet 1 of 3	CIV	GEN
A-G-FP-STAMP:A4	B	IFC	1st Floor Plan	ARCH	CLUB
A-G-P-0001	D	IFT	Site Plan	ARCH	CLUB
A-G-P-0004	D	IFT	Roof Plan	ARCH	CLUB

Use the drop-down menu to quickly navigate between projects.



You can get a full view of the project folder structure.



You can integrate with OneDrive for upload and download functions.

The screenshot shows the 'Document' tab with a table of documents. The table has columns for Document No, Revision, Status, Title, Discipline, Category, Type, and Date Recorded. Above the table, there are buttons for 'Upload to OneDrive' and 'Download from OneDrive', which are highlighted with red boxes. There are also 'New' and 'Refresh' buttons. The table contains 15 rows of document data.

Document No	Revision	Status	Title	Discipline	Category	Type	Date Recorded
AG-C-0001	B	IFI	L1 Concrete Specification	ARCH	ATR	DRAWING	4/24/2015 3:53:31 PM
AG-C-0002	B	IFI	P&ID - Ultra Filtration	MECH	GEN	DRAWING	4/19/2017 2:17:15 PM
AG-D-0001	D	IFT	Roof Design Details	ARCH	CLUB	DRAWING	9/17/2007 6:49:59 PM
AG-EL-0002	F	IFR	Front Elevation	ARCH	CLUB	DRAWING	5/21/2013 9:59:04 PM
AG-EL-0003	F	IFI	Rear Elevation	ARCH	CLUB	DRAWING	5/18/2017 5:14:01 PM
AG-EZY-EL-0003	B	IFC	Rear Elevation	ARCH	CLUB	DRAWING	11/19/2015 1:37:29 PM
AG-FA-000-RDC	A	IFI	Level 1 Concrete Specs	ARCH	L1	SPEC	12/13/2012 10:30:32 AM
AG-FA-001-RDC	A	IFI	Clubhouse Staircase Plans	ARCH	CLUB	DRAWING	9/24/2012 3:54:35 PM
AG-FA-002-RDC	A	IFI	Clubhouse Roof Plans	ARCH	CLUB	DRAWING	4/19/2013 1:53:48 PM
AG-FA-003-RDC	2	IFC	2 1/2 Inch Square Base Plate	STRU	L0	SHOPDWG	6/26/2009 12:14:54 PM
AG-FP-0005	D	IFT	1st Floor Plan	ARCH	CLUB	DRAWING	9/17/2007 6:52:02 PM
AG-FP-0006	D	IFT	2nd Floor Plan	ARCH	CLUB	DRAWING	9/17/2007 6:49:58 PM

NOTE:

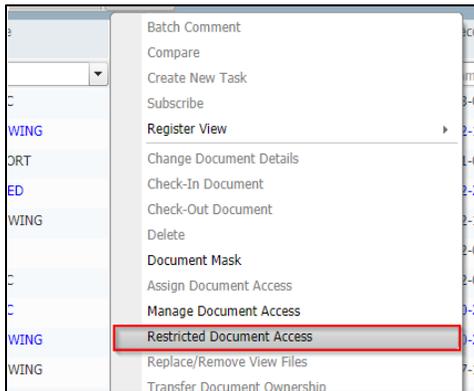
For detailed information and training material, please reach out to your InEight representative

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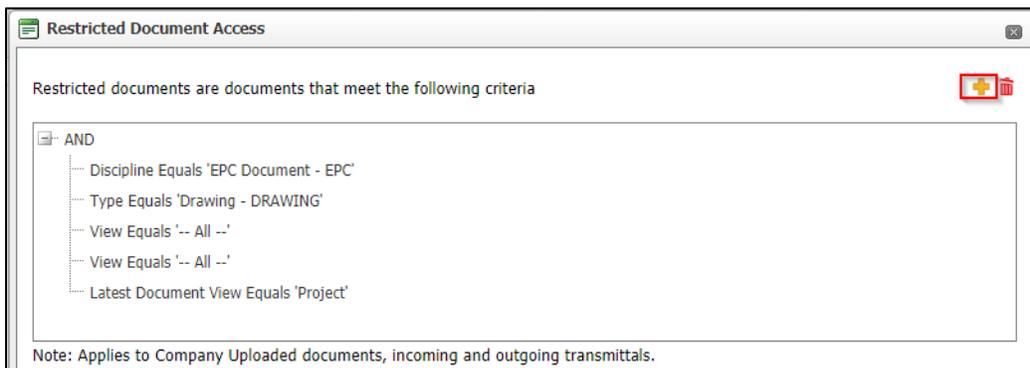
Improvements

Restricted Documents

Select the **More** drop-down menu and click **Restricted Document Access** from the Documents register.



In the Restricted Document Access screen, click  to set the conditions.



Once the conditions are set, select **OK**.

Latest Document View: Project My

Register View: -- All --

-- All --

Status: -- All --

Discipline: EPC Document - EPC

Type: Drawing - DRAWING

Document No.: Contains [] ?

Title: Contains [] ?

Category: -- All --

Date Recorded: Between [] And []
 Within the last [] days

Date Released: Between [] And []
 Within the last [] days

[More search options >>](#)

Manage Clear OK Cancel

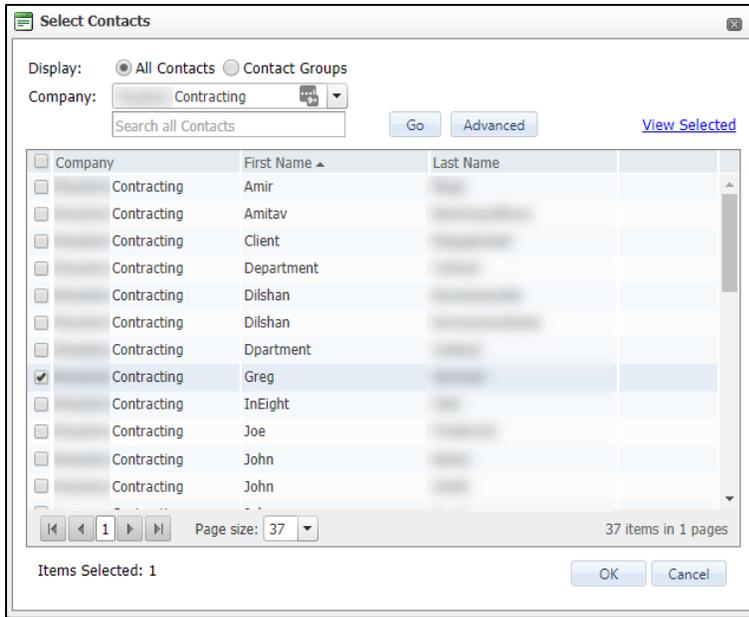
In the *Restricted Document Access* screen, select  to set users that have access to the Restricted Documents.

Users who have access to the restricted documents  

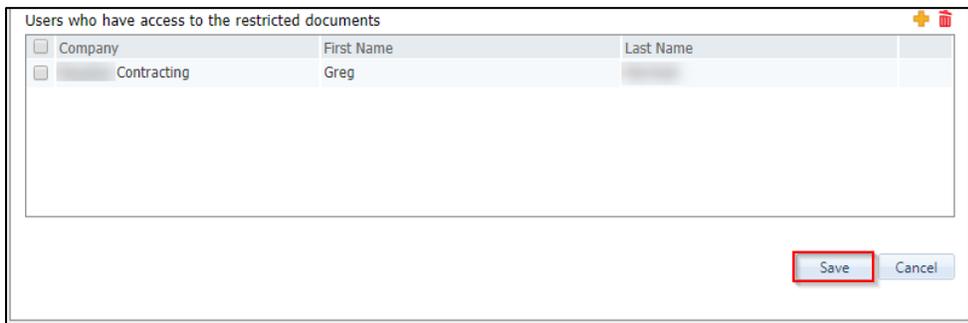
<input type="checkbox"/>	Company	First Name	Last Name
<input type="checkbox"/>	Contracting	Greg	

Save Cancel

Once you select users, select **OK**.



To apply the conditions and users, select **Save**.

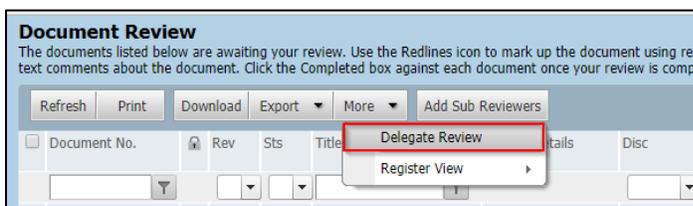


NOTE: For initial implementation or more information, please contact support@ineight.com.

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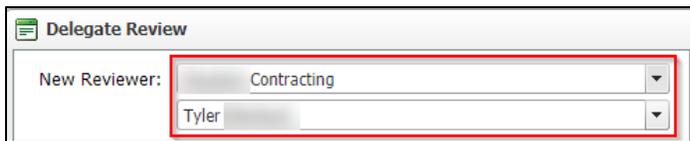
Delegate Review

From the *Review* screen, select the **More** drop-down menu and select **Delegate Review**.

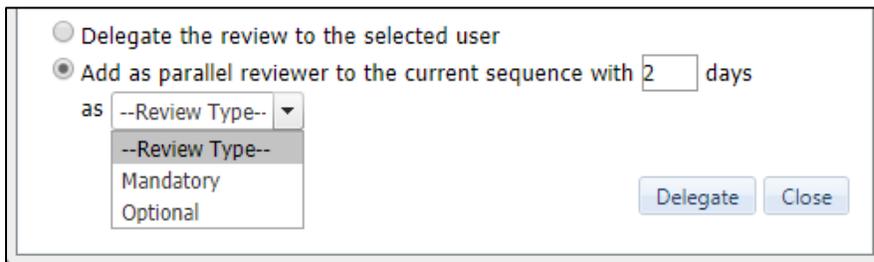


NOTE: This feature is only available under *My Review*.

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



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**.

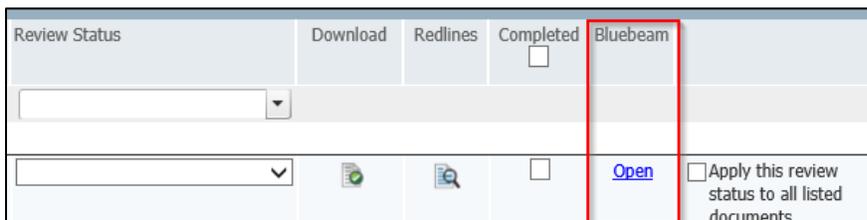


Select **Delegate**.

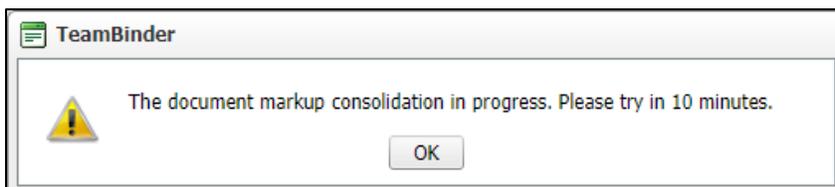
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Status Indicator and Lock for Bluebeam Studio Reviews

From the *Release* window, select **Open** in the **Bluebeam** column.



If the markup consolidation process is not complete and the document has not been returned from the Studio session, the below error message appears.

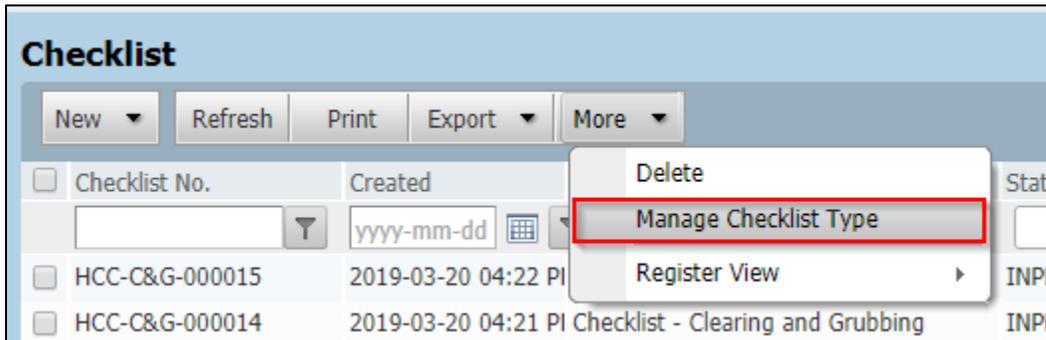


NOTE: The Open column in the *Release* window is currently only available in Internet Explorer.

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Restrict Verifiers based on Checklist Type

Select the **More** drop-down menu and click **Manage Checklist Types**.



The screenshot shows a web interface titled "Checklist". At the top, there are buttons for "New", "Refresh", "Print", "Export", and "More". Below these is a table with columns for "Checklist No.", "Created", and "Stat". The "More" dropdown menu is open, showing options: "Delete", "Manage Checklist Type" (highlighted with a red box), and "Register View".

Checklist No.	Created	Stat
<input type="checkbox"/>	yyyy-mm-dd	<input type="checkbox"/>
<input type="checkbox"/> HCC-C&G-000015	2019-03-20 04:22 PI	INP
<input type="checkbox"/> HCC-C&G-000014	2019-03-20 04:21 PI Checklist - Clearing and Grubbing	INP

Click **Configure** in the **Verifier** column.



The screenshot shows a table with columns: "Checklist Type ID", "Title", "Cat", "Published", "Version", "Company", and "Verifier". The "Configure" link in the "Verifier" column is highlighted with a red box.

Checklist Type ID	Title	Cat	Published	Version	Company	Verifier
<input type="checkbox"/> CLSR	Check List CLSR	Check List 1	02-01-19 03:22 PM	1	QA Software Pty Ltd	Configure

Select **Add Users**.



The screenshot shows a dialog box titled "Configure Checklist Verifiers". It has a section "Valid Verifiers for Clearing and Grubbing" with two radio buttons: "All Users" and "Selected Users". The "Selected Users" radio button is selected. Below the radio buttons are two buttons: "Add Users" (highlighted with a red box) and "Remove". At the bottom, there is a table with columns "First Name" and "Company", and the text "No records to display." below it.

Valid Verifiers for Clearing and Grubbing

All Users

Selected Users

First Name	Company
No records to display.	

Select the users to be listed as verifiers and select **OK**.

<input type="checkbox"/>	Company	First Name	Last Name
<input type="checkbox"/>	Contracting	Dilshan	
<input type="checkbox"/>	Contracting	Dilshan	
<input checked="" type="checkbox"/>	Contracting	Greg	
<input type="checkbox"/>	Contracting	Joe	
<input type="checkbox"/>	Contracting	John	
<input type="checkbox"/>	Contracting	John	
<input type="checkbox"/>	Contracting	Nadia	
<input type="checkbox"/>	Contracting	Roger	
<input type="checkbox"/>	Contracting	Thiru	
<input type="checkbox"/>	Contracting	Tyler	

Select **Save**.

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Checklist History Print template

Select **Print Preview** from the **Print** drop-down menu.

Check List CLSR Checklist Ref: QAS-CLSR-000002

Save Complete Print Close More

In Progress

Print Preview

Details Links History

For Action David

For Info

Subject*: Checklist 001 - Building B

Due Date*: 03-29-19

Test

Inspection Date: 03-08-19

Inspection Comments: inspection completed

Area : BLDG-B - Building B

The history template appears and is ready to be printed.

Print Preview

Print Close

CLSR Reference No: QAS-CLSR-000002
 Status: INPROGRESS

For Action: David

Project: P21TB5TEST

Subject: Checklist 001 - Building B

Due Date: 22 March 2019

01 - Test

Description	Response	Created By	Created On	Edited By	Edited On
Inspection Date	2019-03-08	David	06 March 2019	David	06 March 2019
Inspection Comments	inspection completed	David	06 March 2019		
Area	Building B-BLDG-B	David	06 March 2019		

Verification

Verified By: David

Verified On:

Result:

Verify Comments:

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Defect Report images

You can now include images in defect reports.

The screenshot shows a web interface for generating a defect report. At the top, there is a 'Report Title' field with the value 'Details' and buttons for 'Modify', 'Delete', and 'Add to Favourites'. A 'Maximum records to display' field is set to '10000'. Below this, the 'Run Report' section has a radio button for 'Now' and another for 'On' with a date and time selector set to '29-03-2019 09:42'. There are also 'Export to' options for PDF, Excel, CSV, and Word. The 'Repeat' section has a dropdown for 'One time only' and a 'No end date' dropdown. There are 'To:' and 'Cc:' email address fields. The main search area includes an 'Inspection Company' dropdown set to '-- All --', a 'View' section with radio buttons for 'Created', 'Inspected', 'Responsible', and 'All' (selected), a 'Contractor' dropdown set to 'Synergy Tech', a 'Building' dropdown set to '-- All --', a 'Defect No:' dropdown set to 'Contains' and an empty text input field with a help icon. Below these are two rows of radio buttons for 'Passed' and 'Completed', each with options for 'Both', 'Yes', and 'No'. At the bottom of the search area are four checkboxes: 'Include Photographs', 'Include Drawings', 'Include Map Location', and 'Print Images in Larger Size'. At the very bottom, there are 'Manage', 'Save', and 'Clear' buttons on the left, and a 'Search' button on the right.

Drawings will be printed at the end of the report.

When you select **Include Map Location**, the report will contain the defect's GPS coordinates captured when defects are created on a mobile device. Coordinates can be displayed in Google Maps or alternative mapping systems.

When you select **Print Images in Larger Size**, photos will be printed at the end of the report in full-page size.

Defects Register Details - All Defects
Standard Test Project (Project Titan)

Report No: 03.001
 User:
 Run Date: 29-03-19
 Page: 1



Filter: (Inspector Company ID = 'MARVEL' and = 'BUILDING #1' and Restricted to 10000 records)

Defect No	Inspector	Sub-Contractor	Inspection List	Building	Area	Location	Room	Item	Sub Item	Orientation	Position	Defect	Notes
QAS-000012	Marvel Comics	D&C	Standard Inspection List	BUILDING #1	LEVEL 1	Apartment 101	Bedroom 1	Walls	Plaster	NA	NA	Incomplete	
QAS-000013	Marvel Comics	STECH	Standard Inspection List	BUILDING #1	LEVEL 1	Apartment 101	Kitchen	Windows	Windows	NORTH	DOWN	Needs painting	



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