

**DOCUMENT
ESSENTIALS USER
GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – USING THE DOCUMENTS REGISTER

The Documents Register contains all the documents uploaded by your company on the project. By default, only the latest released revisions of documents are visible.

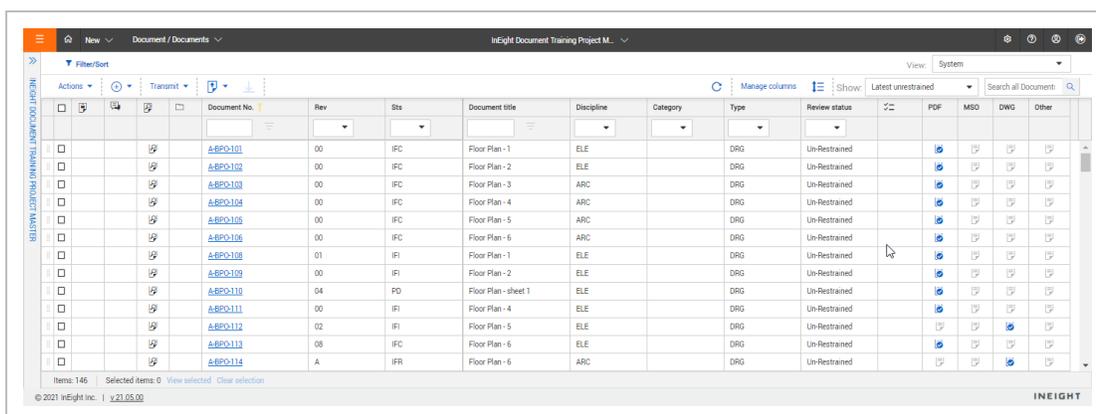
See the links below for information on common tasks you can perform from the Documents Register.

InEight U — Online Training : You must be signed in to access the related course link below.

[Document Register Essentials Course](#)

1.1 VIEWING THE DOCUMENTS REGISTER

The Documents Register is made up of columns that describe the details of each document. You can also add custom fields to the Register view by clicking **Manage columns**.



Document No.	Rev	Sta	Document title	Discipline	Category	Type	Review status	PDF	MISO	DWG	Other
ABPC101	00	IFC	Floor Plan - 1	ELE		DRG	Un-Restrained				
ABPC102	00	IFC	Floor Plan - 2	ELE		DRG	Un-Restrained				
ABPC103	00	IFC	Floor Plan - 3	ARC		DRG	Un-Restrained				
ABPC104	00	IFC	Floor Plan - 4	ARC		DRG	Un-Restrained				
ABPC105	00	IFC	Floor Plan - 5	ARC		DRG	Un-Restrained				
ABPC106	00	IFC	Floor Plan - 6	ARC		DRG	Un-Restrained				
ABPC108	01	IFI	Floor Plan-1	ELE		DRG	Un-Restrained				
ABPC109	00	IFI	Floor Plan - 2	ELE		DRG	Un-Restrained				
ABPC110	04	PD	Floor Plan - sheet 1	ELE		DRG	Un-Restrained				
ABPC111	00	IFI	Floor Plan - 4	ELE		DRG	Un-Restrained				
ABPC112	02	IFI	Floor Plan - 5	ELE		DRG	Un-Restrained				
ABPC113	08	IFC	Floor Plan - 6	ELE		DRG	Un-Restrained				
ABPC114	A	IFR	Floor Plan - 6	ARC		DRG	Un-Restrained				

See the table below for a description of each Register column.

Column	Description
Padlock Icon 	A padlock icon indicates that the document has been checked out. A red exclamation mark icon shows when Bluebeam consolidation has failed. Document continues to attempt consolidation.
Comment Icon 	A blue comment icon indicates there are text comments available for the document. A red comment icon indicates there are outstanding text comments for the document.
View Icon 	A magnifying glass icon indicates there is a preview available for the document.
Folder Icon 	A folder icon indicates that the document is in a folder.
Document No.	The unique identifier for the document.
Rev (Revision)	The revision of the document.
Sts (Status)	The status of the document. This controls whether the document is restrained (needs to be reviewed) or un-restrained (can be released immediately).
Document title	The description of the document.
Discipline	The discipline of the document. Documents can be grouped by discipline (e.g. Structural, Electrical or Mechanical).
Category	The category of the document. Documents can be grouped by category (e.g. Main Building, Carpark, Atrium).

Column	Description
Type	The type of the document. Documents can be grouped by type (e.g. Drawing, Report, Manual).
Review status	The status of the document’s review process (e.g. Released, Un-restrained).
DWG, PDF, DOC and OTHER	The formats the document is available in for download.

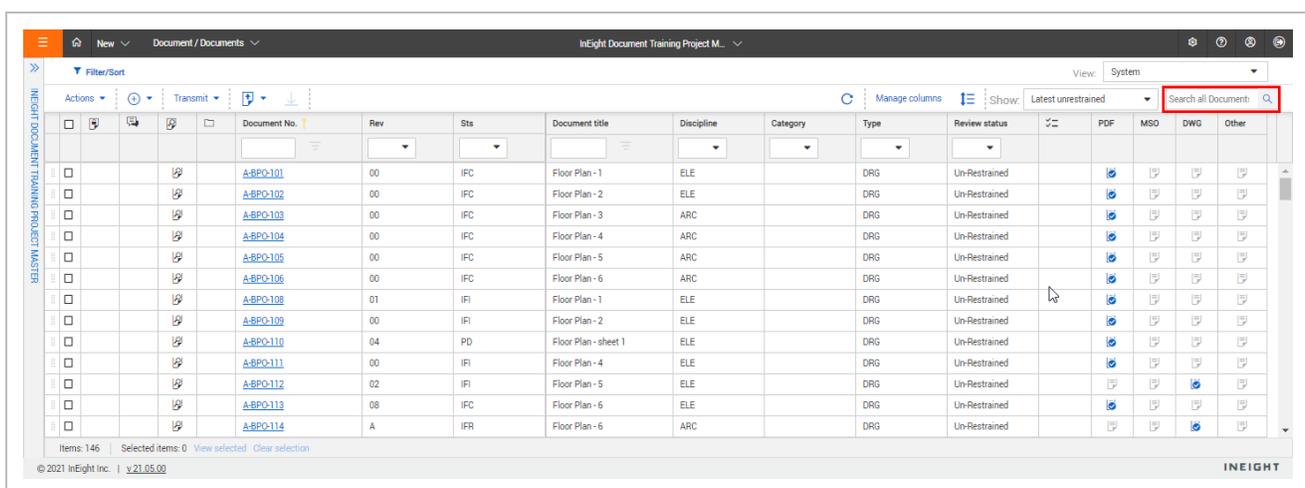
To select a document in the Register, select the document’s check box on the left side of the screen. To select all documents in the register, click **Select all** at the bottom of the page. This feature is available when there are 1000 or fewer entries in the register results. The option is disabled when there are more than 1000 entries. To copy text from a single cell in any register, right-click in the cell and then select **Copy text** to add the cell contents to the clipboard.

To open a document, click the document number or double click the row of the document. The document opens to the details page or in the viewer, depending on your user preferences.

1.2 SEARCHING FOR DOCUMENTS

There are several ways to search for documents in the Documents Register.

Simple search – Enter key words in the search box above the Register. The Register will display documents with those key words.



Filter and sort – Click **Filter/Sort** to select filters for your search. Click **Apply** to apply the search filters.

Filter/Sort
✕

Filter and sort

Show: Latest unrestrained Documents that I can downlo...

Filter by:	Module	Column	Operator	Value ?
+	Document	Select one...	Select one...	Select some items ✕
+	AND Document	Select one...	Select one...	Select some items ✕
+	AND Document	Select one...	Select one...	Select some items ✕
+	AND Document	Select one...	Select one...	Select some items ✕
+	AND Document	Select one...	Select one...	Select some items ✕

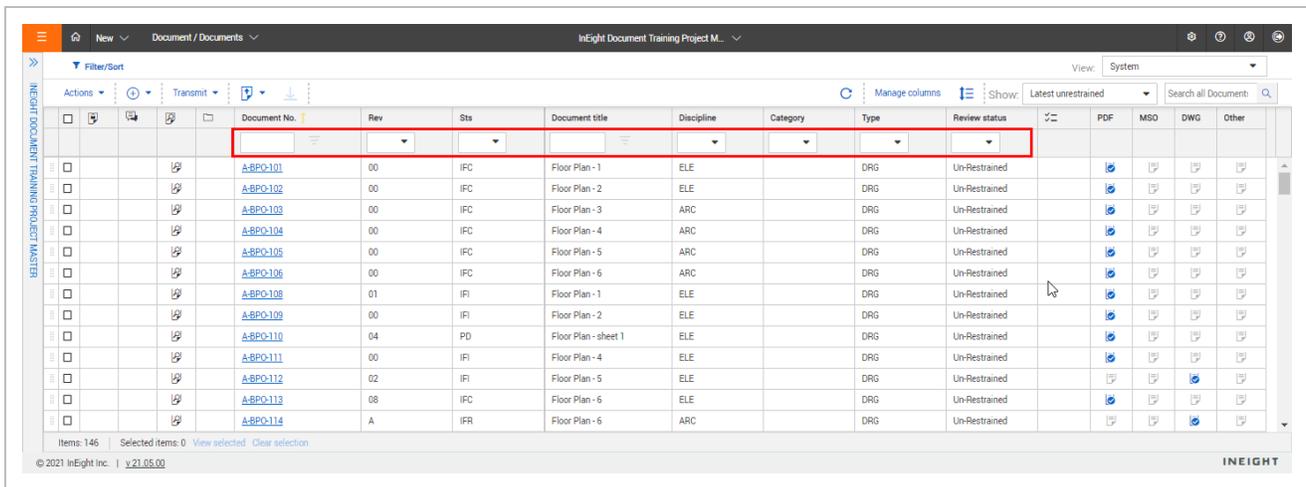
Sort by:	Column		
+	Document No	<input checked="" type="radio"/> Ascending order	<input type="radio"/> Descending order ✕
+	THEN Select one...	<input checked="" type="radio"/> Ascending order	<input type="radio"/> Descending order ✕
+	THEN Select one...	<input checked="" type="radio"/> Ascending order	<input type="radio"/> Descending order ✕

Reset
Apply

For projects using the Vendor data module, you can filter the register based on metadata of a linked deliverable or purchased item. The metadata fields do not show in the register, but you can enter them in the filter criteria. The Module column lets you identify whether the filter is for a document, deliverable item, or purchased item. You can then enter a value representing the deliverable or purchased item. When you click **Apply**, all the documents linked to the corresponding deliverables or purchased items are shown.

The Column column lets you filter by a column in the register or a link type, such as Mail.

Column filters – Enter key words into the columns above the Register or select the drop-down lists to apply filters to that column.

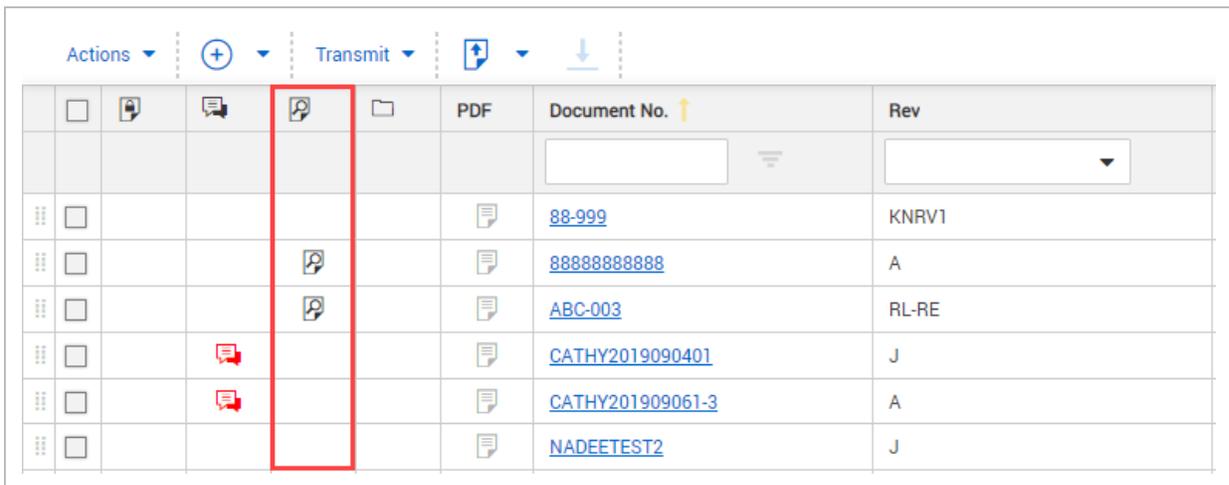


1.3 VIEWING DOCUMENTS WITH FILE VIEWER

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

1.3.1 To view a document using File Viewer:

1. Click the **view icon** to load the document in File Viewer.



2. The viewer contains a number of options to **annotate, measure** or **view the document**. In the left menu, you will be able to see annotations made by reviewers and also toggle user layers as necessary.

New File Viewer (version 21.05)

Document No: A-G-SCH-003 Rev. C Sts: IFR

DETAIL LINKS COMMENTS FILE VIEWER USER ACCESS TRANSMITTAL HISTORY

Comment File names PDF - A-G-SCH-003 C.IFT.pdf

Viewing tools Markup Measure

Annotations

17/6/2021 Joe Fredericks Houston Contracting Page: 1

17/6/2021 Joe Fredericks Houston Contracting Page: 1

Material Report for job: A-0001
Report Style: Parallel Detail

Wednesday, November 01, 2006, 10:27 AM

WKSHT	BS ACCT#	ITEM	MATERIAL	USEPARTS/KM	DESCRIPTION	QTY	UNIT	COST	LABOR	SALES TAX	TOTAL
1000-1999 PREPARATION											
	FEES	143-1010	BS-0011 Building Permits	Detail Co.		563	EACH	1.00	-	-	563.00
	FEES	143-1025	BS-0010 Bldg Inspection Fee	Detail Co.		1	EACH	25.00	-	-	25.00
	FEES	143-1015	BS-0010 Certificate Of Occupancy	Detail Co.		1	EACH	25.00	-	-	25.00
	FEES	143-1030	BS-0010 Veterinary Health (BH)	Hennelbush Pharmacy		1	EACH	450.00	-	-	450.00
	FEES	143-1101	BS-0010 Architectural Fee	Design Modifications		1	EACH	450.00	-	-	450.00
	ENG	143-1102	BS-0031 Engineering (Site)	King Pkg or Framing		1	EACH	75.00	-	-	75.00
	FEES	143-1110	BS-0001 Blueprints	Conce. & Office Set		1	EACH	25.00	-	-	25.00
	SURV-S	143-1100	BS-0042 Survey (Shale Footings)	Locate Home on Lot		1	EACH	175.00	-	-	175.00
	SURV-F	143-1100	BS-0046 Survey (Final Plat)	Plat for Closing		1	EACH	375.00	-	-	375.00
	FOUNL	143-2105	SITE-04-0023-9 GeoTe Drive	#Cashed Stone		40.00	ROLL	40.00	20.00	-	60.00
	GRAV	143-1225	SITE-01-0014-4 Gravel Driveway	#Cashed Stone		9	TON	12.63	-	-	121.62
	GRAD-R	143-1230	BS-0102-R Grading Rough	Clear & Grade Lot		1	EACH	600.00	-	-	600.00
	UTIL-C	143-1410	BS-0070 Temporary Electric	Connect to Neighbors		1	EACH	50.00	-	-	50.00
	FEES	143-1400	BS-0070 Water Service (Permit)	Detail Co.		1	EACH	850.00	-	-	850.00
	FEES	143-1400	BS-0070 Sewer Service (Permit)	Detail Co.		1	EACH	650.00	-	-	650.00
	FEES	143-1510	BS-0000 Conast Parcel Interest	3 Month Allowance		1	EACH	1800.00	-	-	1800.00
	FEES	143-1520	BS-0000 Closing Fees & Costs	Construction Loan		1	EACH	1000.00	-	-	1000.00
	FEES	143-1530	BS-0000 Appraisal Conast Loan	Construction Loan		1	EACH	200.00	-	-	200.00
	FEES	143-1540	BS-0000 Taxes During Conast	Property Taxes		1	EACH	150.00	-	-	150.00
	FEES	143-1550	BS-0000 Builders Risk Insurance	General Liability		1	EACH	200.00	-	-	200.00
			1-SUBTOTAL								8444.62
2000-2999 EX FOUNDATION											
	GRAD-B	143-2000	BS-0102-B Backfill	StatBox or BarriWall		1	EACH	100.00	-	-	100.00
	FOUNL	143-2105	ME-T-01001 Wire Mesh (Site)	65REBAR		2	ROLL	0.98	-	-	0.12
	FOUNP	143-2105	ME-T-040023-10 Rebar (Footings)	#4-12@REBAR		25	PCS	3.20	-	-	5.60
	FOUNP	143-2105	ME-T-03-0030 Rebar (Wall)	Walls		5	PCS	0.15	-	-	0.85
	FOUNP	143-2105	TAM-07-0007-10 Weep Tile/Drain Tile	41@SOLID		265	FEET	-	-	-	-
			Stone (Site)			28	CYD	-	-	-	-
	FOUNL	143-2105	GEN-01-CCH16 Foundation Form Nails	16D		5	POUNDS	1.00	-	-	0.35
	FOUNL	143-2105	WOOD-02-0002 Foundation Form Board	141PMR 2"x11"		242	FEET	0.98	-	-	253.76
	FOUNL	143-2105	WOOD-02-0004 Foundation Form Board	241DVT 2"x4"		162	FEET	0.22	-	-	42.84
	FOUNP	143-2105	TAM-09-0000 Slab Perimeter Insulation	8500V2 1"x4'@8'@"		13	EACH	10.00	-	-	9.10
	FOUNP	143-2105	GEN-04-0001 Anchor Bolt	MAGNUMSIL		20	EACH	0.79	-	-	1.10
	FOUNP	143-2105	SITE-04-0023-1 Silb Fence	3x100@SLTFEN		13	EACH	25.00	-	-	1.75
	FOUNP	143-2105	TAM-04-0010 Masonry/Block	20@BPOK5		862	SQFT	0.02	-	-	1.31
	FOUNP	143-2105	TAM-04-0000 Vapor/Barrier	1673 SQFT		1673	SQFT	0.04	-	-	4.68
	FOUNP	143-2105	TAM-04-0000 Vapor/Barrier/Cgl	1054 SQFT		1054	SQFT	0.04	-	-	4.22
	TERM	143-2300	BS-0189 Terminate Protection	Pre-Treatment		1	EACH	200.00	-	-	200.00
			SUBTOTAL								963.02
3000-3129 ROUGH STRUCT											
3110ML31100FoundationFloor											

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Document No: STR-U-DWG-012 Rev. A Sts: IFU

DETAIL LINKS COMMENTS FILE VIEWER USER ACCESS TRANSMITTAL HISTORY

Comment File names PDF - millennium_series_progressive_cavil

Viewing tools Markup Measure

Discharge (END) 8" Flange ANSI B16.1 FF

14"

87.88" (+/- 0.25)

Suction (TOP) 8" Flange ANSI B16.1 FF

Hole Size 0.875"

9.5"

12"

17.5"

9"

2.375" Shaft Dia. Keyway 0.625" x 0.3125"

9.62"

30"

26"

7.75"

14.5"

2 Stage Pump

(Pump Rotation is Counter Clockwise) ALL DIMM: Inches

Net weight = lbs. **1225**

P: 847.640.7887 F: 847.640.7855
2525 Clearbrook Drive Arlington Heights, IL 60005
www.libertyprocess.com

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NOTE If you want to view different details of the document, click the tabs to navigate between screens.

1.4 VIEW PDFS WITH PDF VIEWER

When you open a PDF for viewing, the PDF viewer opens. The PDF viewer is a web-based application that renders the document using your browser and can also be used to mark up documents.

[Download PDF Viewer Quick Guide](#)

1.4.1 To view a document from the Document register using PDF viewer

When you select a PDF from the document register, the document opens with the PDF viewer. The PDF viewer gives you tools to search file text, view, and manage comments and annotations, and view links.

The PDF viewer is available for projects that started with Document release 21.5. The viewer also opens when you select a PDF document from anywhere in Document for viewing.

1. Locate the document in the Document register or dashboard tile. A blue icon in the PDF column indicates a PDF that you have access to.
2. Click the **View** icon to load the document in PDF Viewer.

The PDF image is shown in a new browser window.

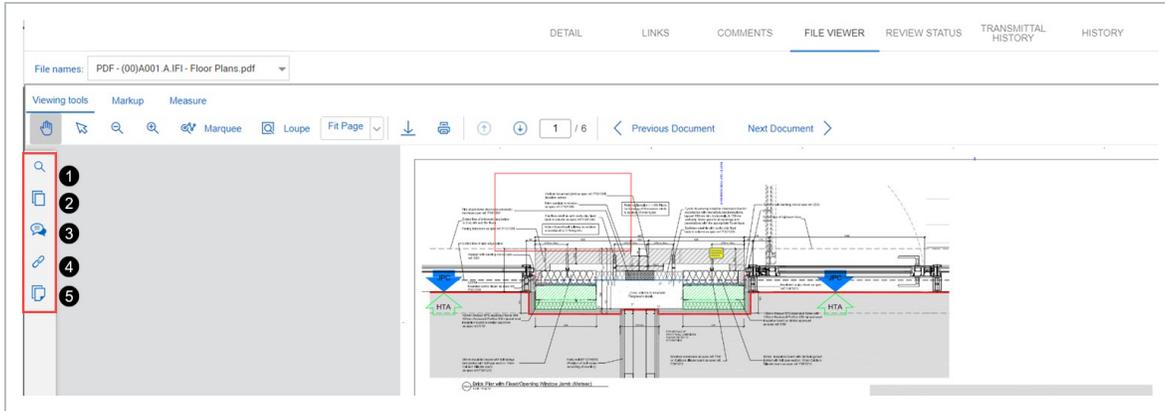
You can view the document, search for text, view and manage comments, add and view links, and add and manage annotations.

1.4.2 PDF viewer toolbars

The PDF viewer has toolbars for managing annotations, viewing, markups, and measuring.

1.4.2.1 Organization tools

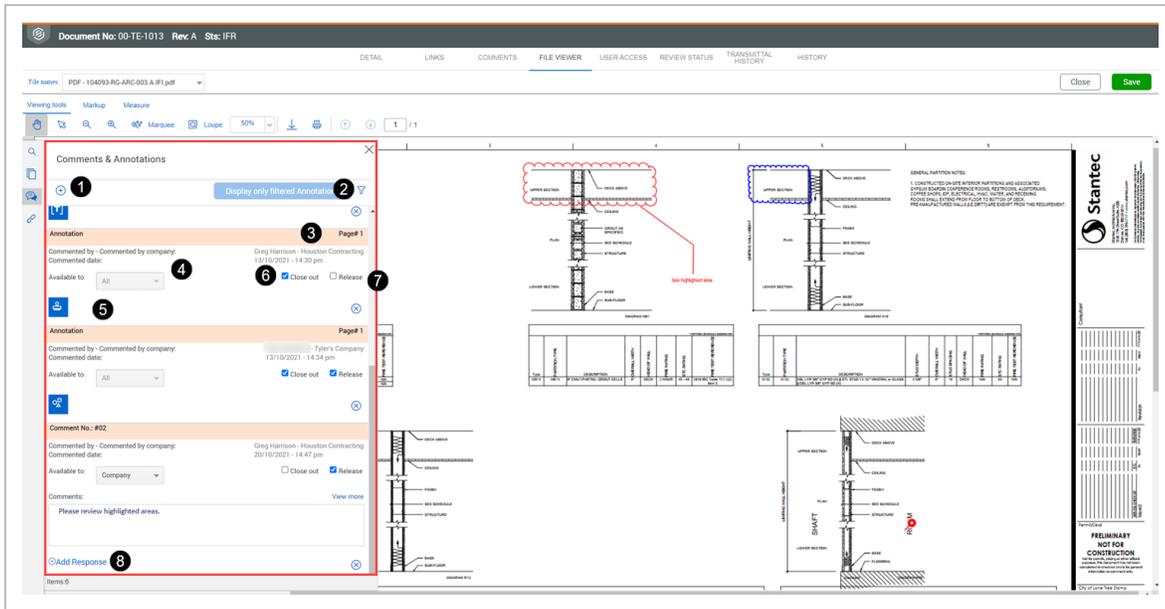
The left side toolbar gives you tools to help you keep track of the annotations, comments, and links. You can also search for text or view thumbnails of the PDF. The toolbar is shown on all tabs of the PDF viewer.



Item number	Name	Use
1	Search tool	Search for text in the document. Use this tool for documents with searchable text. Click the search result to see the text highlighted in the document.
2	Thumbnail	View a thumbnail of each page of the document. You can scroll through the thumbnails and click to go directly to that page.
3	Comments	View comments and annotations, such as notes, shapes, pencil lines, and stamps, associated with the document. You can also create new comments or respond to existing comments. The annotations include the user name, company, date created, and the page number. Click on an annotation in the list to see the location of the annotation on the page.
4	Links	View a list of links associated with the document. You can click a link to open the specified item.
5	Documents	View a table of contents of all documents in the register. You can select a document from the list and open it in the current window instead of going back to the Documents register to open it.

Comments & Annotations Pane

The Comments & Annotations pane lets you see all comments and annotations that were added to the document.



Item number	Name	Use
1	New Comment	Lets you add a new comment to the document.
2	Filter	Lets you filter and sort comments and annotations in the list. When you filter annotations the filtering is also applied to the markups in the viewer. Only the annotations that meet the filter criteria are shown in the viewer.
3	Page number	The page where the annotation can be found.
4	Comment information	Lets you see the name of the commenter, their company, the commented date, and the available to option.
5	Annotation indicator	The icon shows you the type of annotation. Click the annotation to see it highlighted in the document.
6	Close out	Lets you close out the comment or annotation.
7	Release	If you are the review coordinator, this check box is shown. Check this box to release the comment or annotation.
8	Add response	Lets you add a response to a comment.

When you click an annotation in the pane, the annotation in the file is highlighted. You can also click an annotation in the file, and it is highlighted in the annotation pane.

1.4.2.2 Viewing tools tab

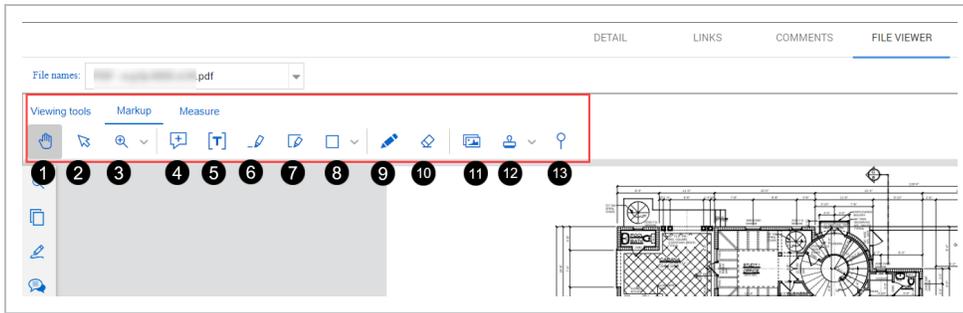
The tools in the Viewing tools tab toolbar let you customize how you view the PDF.



Item number	Name	Use
1	Pan hand	Click and drag to move a large drawing around in the viewing area.
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.
4	Marquee	Magnify an area of the page. Use the pan hand tool to move the page in the viewer. Use the Zoom out tool to return to the original size.
5	Loupe	View a magnified area of the page by hovering over it.
6	Previous and Next Document	Open the next or previous document in the register from the viewer.

1.4.2.3 Markup tab

Tools on the Markup tab let you add text and other annotations to the PDF. You must save any markups you make before closing the file.



Item number	Name	Use
1	Pan hand	Click and drag to move around a large drawing.
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.
4	Note	Add a note to the PDF page.
5	Text box	Add a text box on the PDF page. Text added to a text box is shown in the Comments field of the annotation in the Comments & Annotations pane. It is also shown as a comment in the document's Comments register.
6	Highlight	Highlight text on the PDF page.
7	Area highlight	Draw a highlight box.
8	Shape	Draw a shape, such as a square, circle, or line.
9	Pencil	Draw a pencil line.
10	Eraser	Erase a pencil line.
11	Image	Insert a saved image.
12	Stamp	Add a stamp, such as one that shows approval or rejection.
13	Pin	Place a marker (pin) to an area of the PDF page.

Link an existing item to an annotation

You can link an existing item, such as mail, a document, or a form, to support an annotation on the PDF. For example, if you annotated a drawing with a note, you can add items to support that note.

The item to link must already exist in Document. See [Link a new item to an annotation](#) for information about creating a new item and linking it. If you want to add links to the document in general, you can use the Links tab.

1. Click the Select tool, and then click an annotation. A menu of linking options is shown.
2. Select **Link existing items** from the menu. A search dialog box opens.



3. Select the search criteria type, and then enter the search criteria.
4. Click **Search**.
5. Select one or more items from the search results, and then use the move right arrow to move the items to the Selected work items to link section of the page.
6. Repeat steps 3–5 until you have the links you want. Click **Save**.
7. Click **Save** in the PDF viewer.

The items are linked to the text. You can see them when you use the Links tool.

Link a new item to an annotation

You can create a new item, such as mail, a document, or a form, and then link it to annotation on the PDF in a single procedure. For example, if you annotated a drawing with a note, you can create items to support that note.

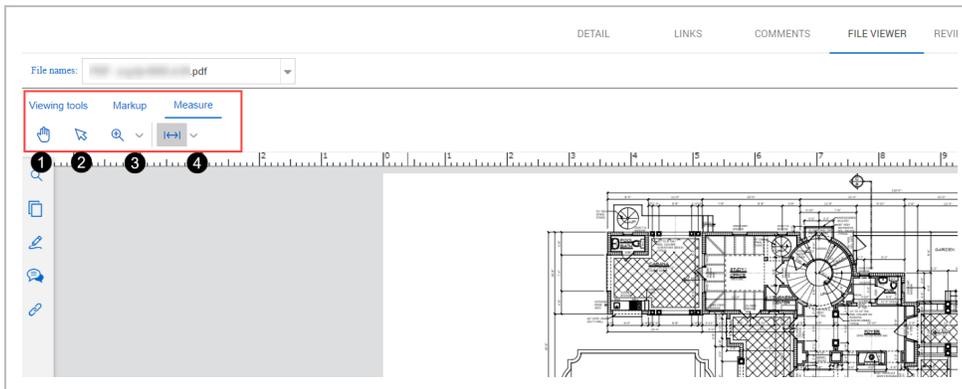
You can create and link an item to an annotation from any of the tabs of the PDF viewer. If you want to add links to the document in general, you can use the Links tab.

1. Click the Select tool, and then click an annotation. A menu of linking options is shown.
2. Select the type of item you want to link (for example, Link new document).
3. Create the new item and then save it.
4. Click Save on the PDF viewer.

The items are linked to the text. You can see them when you use the Links tool.

1.4.2.4 Measure tab

The measure tab has tools that let you measure distances, perimeters, and areas on a PDF drawing.



Item number	Name	Use
1	Pan hand	Click and drag to move a large drawing around in the viewing area.
2	Select text and annotations	Select existing text or annotations, so you can add or manage links or delete.
3	Zoom tools	Zoom in or out of the PDF page.

Item number	Name	Use
4	Measure	Draw an area to measure distance, perimeter, or area. A dialog box opens that lets you specify the scale.

1.4.3 Automatic document linking

When you upload a PDF with searchable text (OCR), Document searches for the text for document numbers that correspond to documents in the register. When it finds the matching text, it creates a hyperlink to the document. You can click the document number link to go directly to the corresponding document.

[Download PDF Viewer Quick Guide](#)

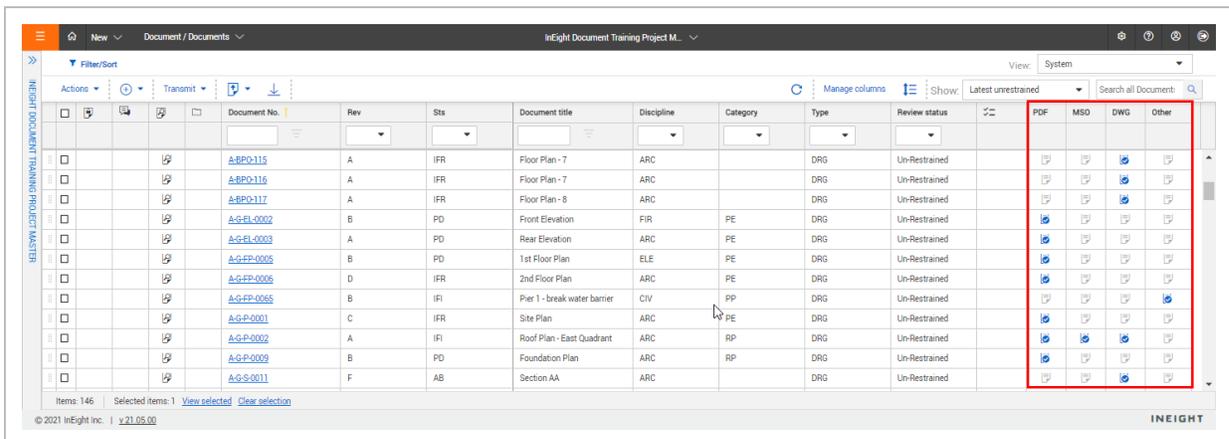
1.5 DOWNLOADING RELEASED DOCUMENTS

Download documents you have access to directly from the Register. The format columns indicate which formats the document is available in. An icon with a tick means you have access to the file and can download it. You can download the document with or without annotations (that is, markups).

1.5 Step by Step 1 — Download a document without annotations

You can download any document without markups that have been made.

1. Click the **Download** icon of the format you want to download.



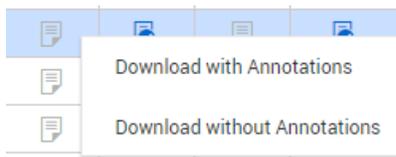
2. If the document is a PDF, a menu shows with options to download with or without annotations. Choose **Download without Annotations**. If the document is not a PDF, the option is not shown.
3. If a download disclaimer appears, click **Agree**.
4. Click **Download** to save the file to your computer.

1.5 Step by Step 2 — Download a document with annotations with Adobe

You can download a PDF with markups.

This option is available in the PDF viewer only and is only supported with Adobe.

1. Click the **Download** icon of the PDF you want to download. A menu shows with options to download with annotations or without annotations.



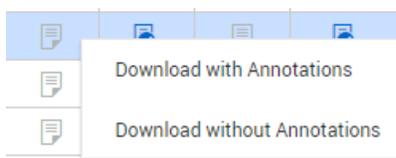
2. Click **Download with Annotations**. PDF files are provided in a zip file.
3. Extract the zip file.
4. Open the PDF file.

1.5 Step by Step 3 — Download a document with annotations with Bluebeam

You can download a PDF with markups.

This option is available in the PDF viewer only and is only supported with Bluebeam.

1. Click the **Download** icon of the PDF you want to download. A menu shows with options to download with annotations or without annotations.



2. Click **Download with Annotations**. PDF files are provided in a zip file.

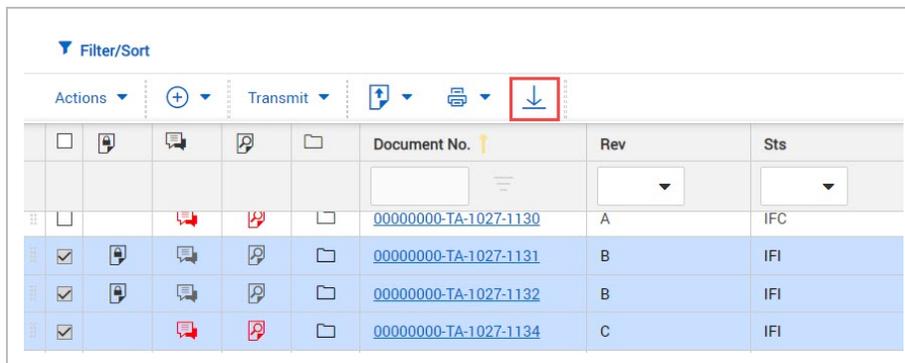
3. Extract the zip file.
4. Open the PDF in Bluebeam.

1.5 Step by Step 4 — Download multiple documents with annotations with Adobe

You can download PDFs with annotations in bulk with Adobe..

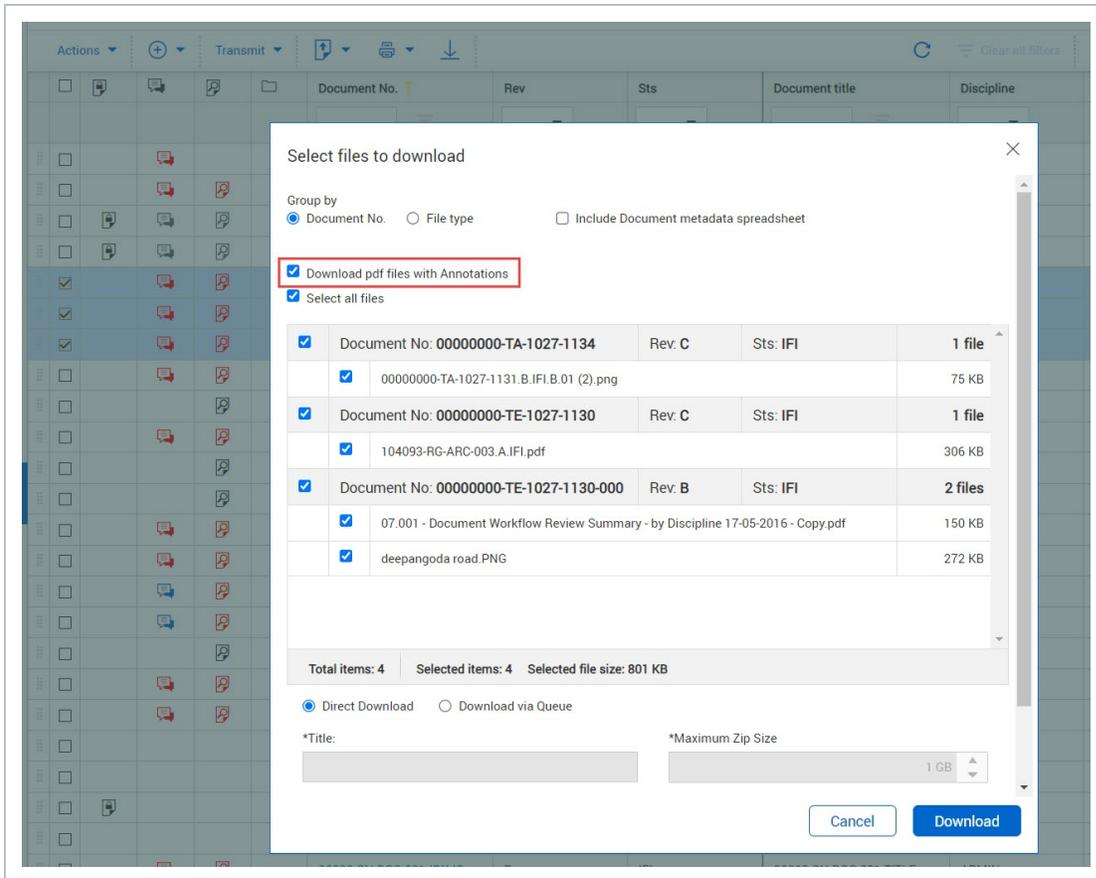
The option is available in the PDF viewer only.

1. Select multiple PDFs from the register, and then click the **Download** icon.



The Select files to download dialog box opens.

2. Select the **Download pdf files with Annotations** check box. PDF files are provided in a zip file.



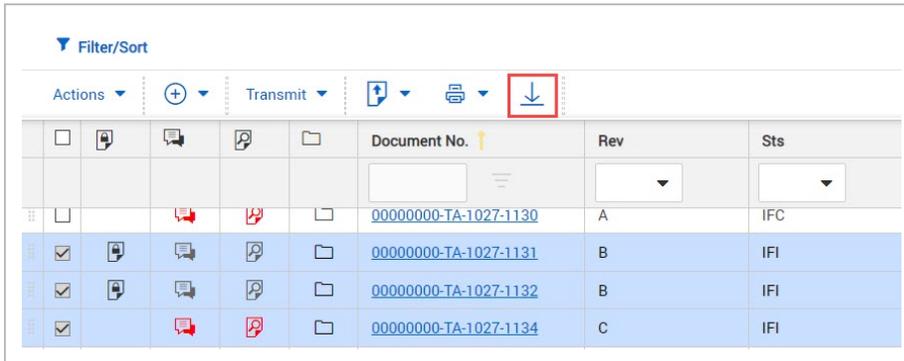
- 3. Extract the zip file.
- 4. Open the PDF file.

1.5 Step by Step 5 — Download multiple documents with annotations with Bluebeam

You can download PDFs with annotations in bulk with Bluebeam.

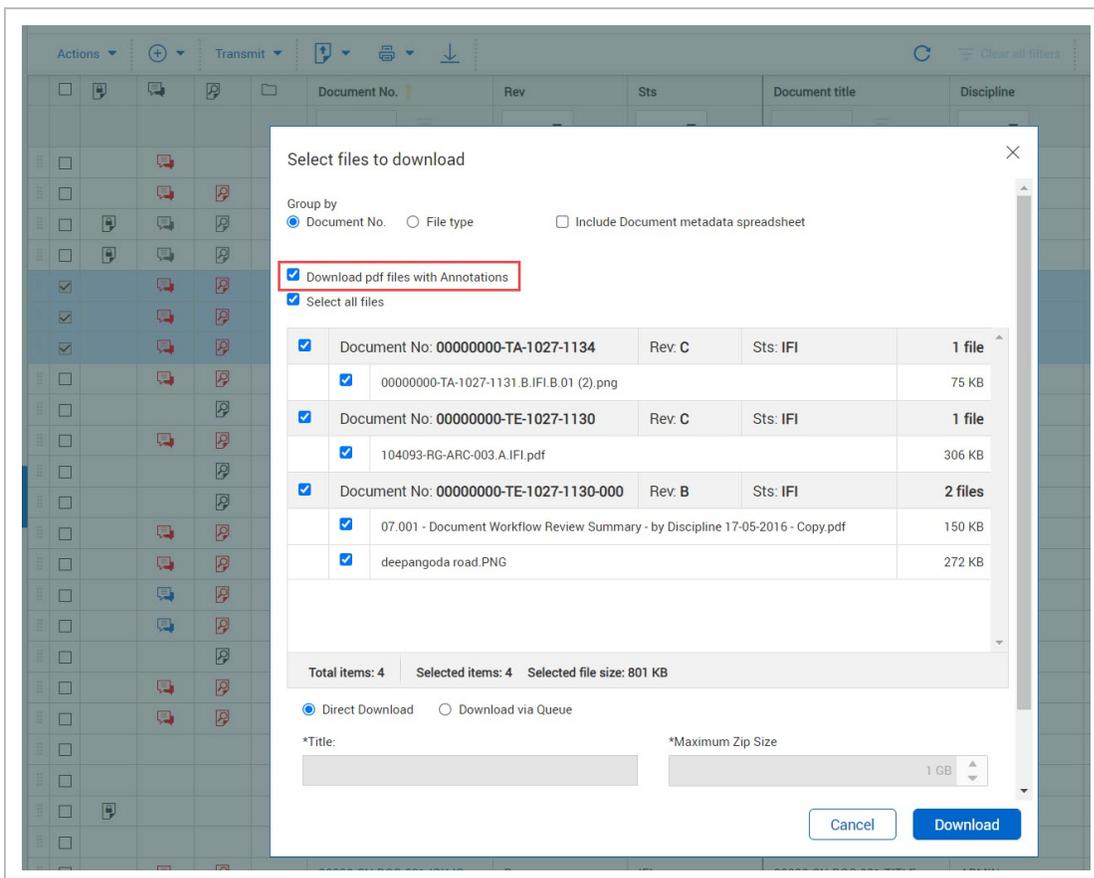
The option is available in the PDF viewer only.

1. Select multiple PDFs from the register, and then click the **Download** icon.



The Select files to download dialog box opens.

2. Select the **Download pdf files with Annotations** check box. PDF files are provided in a zip file.



3. Extract the zip file.
4. Open the PDF in Bluebeam.

1.6 DOWNLOADING DOCUMENTS IN BULK

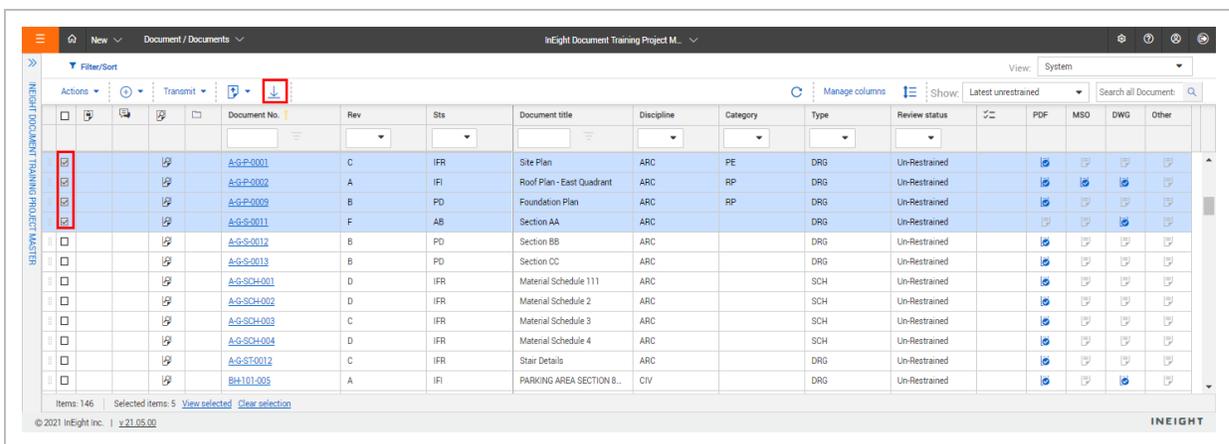
Easily download lots of documents using the bulk download feature. You can download documents directly or download from a queue.

1.6.1 Download documents directly

You can download documents directly to your Downloads folder when you have 100 documents or less.

The option to download documents directly is available only when the number of documents is 100 or less. The documents are downloaded in a zip file. There is no password protection or control over the zip file size. If you want to protect the zip file with a password or control the file size, you can use the download from a queue method.

1. Select the documents in the Register.
2. Click the **Download** icon.



The Select files to download dialog box opens.

3. Select whether to group documents by document number or file type.

Select files to download ×

Group by
 Document No. File type

Include Document metadata spreadsheet

Select all files

<input checked="" type="checkbox"/>	Document No: 00000000-TE-1027-1130	Rev. B	Sts: IFI	3 files
<input checked="" type="checkbox"/>	TS-10032015-RESTDOC-02.A.IFI.doc			962 KB
<input checked="" type="checkbox"/>	TS-25062015-RESTDOC-04.TSRE1.IFC.plt			82 KB
<input checked="" type="checkbox"/>	New Text Document.txt			1 KB
<input checked="" type="checkbox"/>	Document No: 00000000-TE-1027-1130-0000 11	Rev. B	Sts: IFI	1 file
<input checked="" type="checkbox"/>	TS-06052015-UNRESTDOC-05.TSRE1.TSUN1.pdf			103 KB

Total items: 4 Selected items: 4 Selected file size: 2 MB

Direct Download

Download via Queue

*Title:

*Maximum Zip Size

Password protect the downloaded zip file

Cancel
Download

4. Select whether to include the document metadata spreadsheet.

5. Select the **Direct Download** radio button.

6. Click **Download**. The files are downloaded in a zip file.

You can unzip the file and view the documents.

1.6.2 Download documents in a queue

Download documents to a queue when you have to download more than 100 documents. You can also use a queue when you want to minimize the performance impact of downloading documents. You can also use this method when you want to add a password to the zip file, control the size of the zip file, or track what has been downloaded.

The download to a queue runs on a separate process, so it does not take away from the performance of the project. After the files have been downloaded to the queue, you can download them to your workstation.

1. Select the documents in the Register.
2. Click the **Download** icon. The Select files to download dialog box opens.
3. Select whether to group documents by document number or file type.

Select files to download

Group by
 Document No. File type

Include Document metadata spreadsheet

Select all files

<input checked="" type="checkbox"/>	Document No: 00000000-TE-1027-1130	Rev. B	Sts: IFI	3 files
<input checked="" type="checkbox"/>	TS-10032015-RESTDOC-02.A.IFI.doc			962 KB
<input checked="" type="checkbox"/>	TS-25062015-RESTDOC-04.TSRE1.IFC.plt			82 KB
<input checked="" type="checkbox"/>	New Text Document.txt			1 KB
<input checked="" type="checkbox"/>	Document No: 00000000-TE-1027-1130-0000 11	Rev. B	Sts: IFI	1 file
<input checked="" type="checkbox"/>	TS-06052015-UNRESTDOC-05.TSRE1.TSUN1.pdf			103 KB
<input checked="" type="checkbox"/>	Document No: 000000-TIS-DOC-0003	Rev. B	Sts: IFI	2 files
<input checked="" type="checkbox"/>	07.001 - Document Workflow Review Summary - by Discipline 17-05-2016.pdf			150 KB
<input checked="" type="checkbox"/>	deepangoda road.PNG			272 KB

Total items: 156 Selected items: 156 Selected file size: 281 MB

Direct Download Download via Queue

*Title: *Maximum Zip Size

Password protect the downloaded zip file

Cancel Download

4. Select whether to include the document metadata spreadsheet.
5. Select the **Download via Queue** radio button.
6. Enter the title of the zip file and the maximum zip file size.
7. If you want to protect the zip file with a password, select the **Password protect the downloaded zip file** check box, and then enter a password.
8. Click **Download**. A message stating the download has completed successfully is shown after the download is complete.

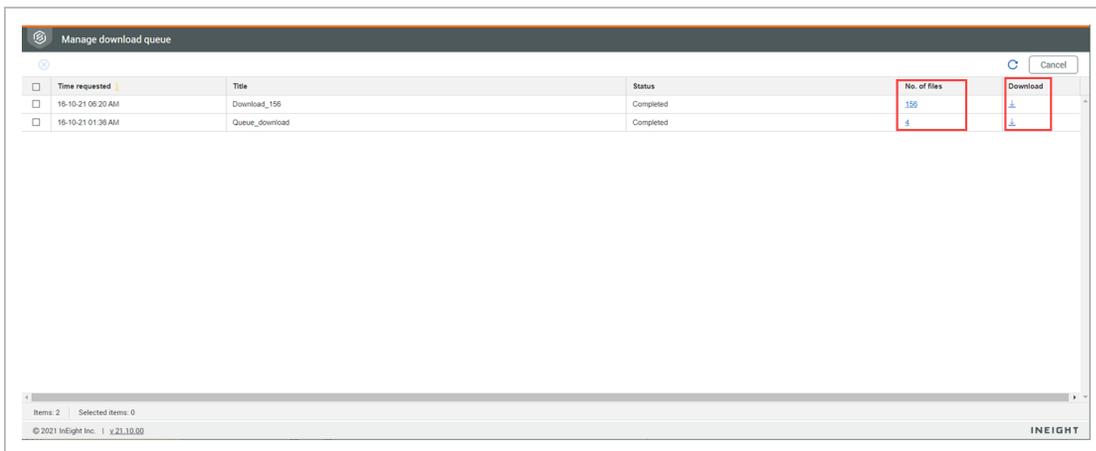
You can then download the documents from the queue to your workstation.

1.6.3 Download documents from a queue to your workstation

After documents have been downloaded to a queue, you must download them to your Downloads folder.

After you download files, you can go to the queue to manage the files. Expired downloads have a yellow exclamation point in the Download column of the Manage download queue. If a download has expired, you cannot download the documents to your workstation, and the documents must be downloaded to the queue again.

1. From the Documents Register, click the **Actions** menu, and then select **Manage download queue**. The Manage download queue dialog box opens.
2. If you want to see a list of the files in the download, click the number in the No. of files column for the download.



3. Click the **Download** icon in for the download. The files are downloaded in a zip file to your Downloads folder.

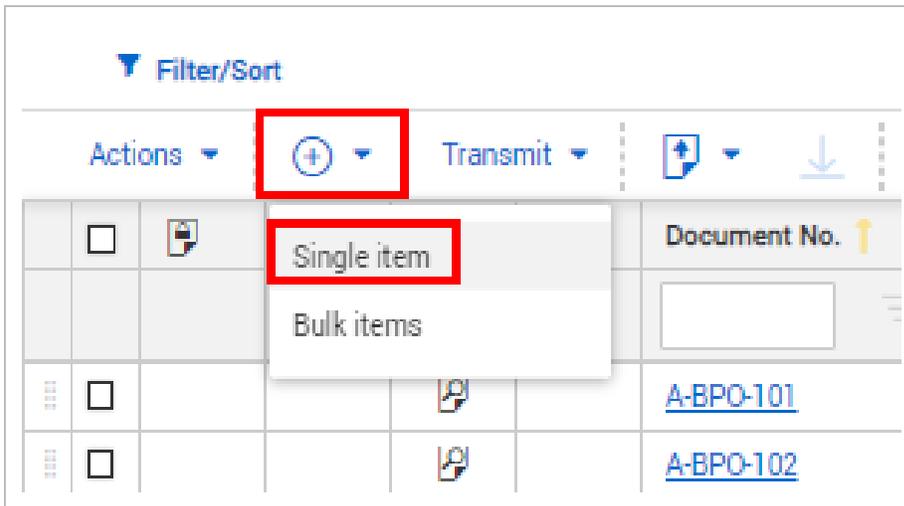
You can unzip the file and view the documents. If you entered a password when you downloaded to the queue, you must enter it to unzip the file.

1.7 UPLOADING A SINGLE DOCUMENT

Upload documents to the Documents Register to manage and perform actions on them.

1.7.1 To upload a single document:

1. Click the **plus icon** and select **Single item**.



2. Enter the document details.
3. Click **Attach files** to upload files.

4. Click **Save**.

NOTE

- Click **Actions** and select **Duplicate** to create a new document based on the attributes of a document you've selected.
- Click the **arrow** next to **Save** and select **Save & Transmit** to automatically launch the transmittal generation screen after the document is uploaded.
- If the Enable OCR PDF's on document upload project setting has been enabled, a batch process runs every 15 minutes and automatically applies optical character recognition (OCR) to PDF files.

1.7.2 Optical character recognition (OCR)

Document's OCR function is an automatic process that uses optical character recognition (OCR) to check PDFs for unextractable text and converts it to searchable text. This feature is available for PDF documents that are A4/Letter size or larger and written in English. Only files in the Document module are considered by the OCR function.

OCR functionality is enabled at the project level.(Project settings > Document > Upload > **Enable OCR PDF's on document upload**).

The OCR process runs in the background every 15 minutes.

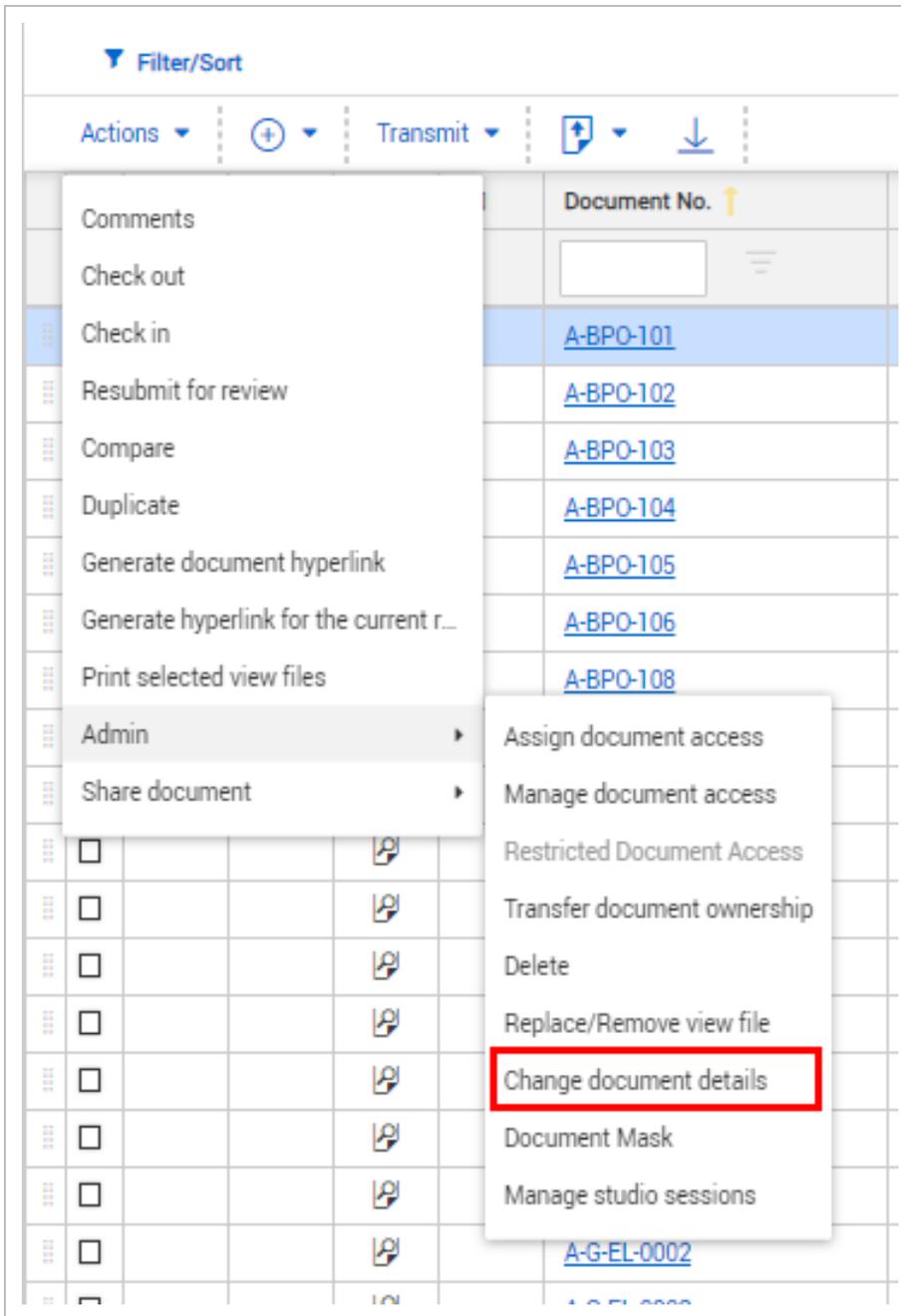
When the OCR process completes, the document view file is replaced with the new version, and a corresponding entry is created in the Document History.

1.8 CHANGING DOCUMENT DETAILS

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

1.8.1 To change document details:

1. Select the document in the Register and click **Actions**.
2. In the **Admin** menu, select **Change document details**.



3. Edit the details as required.

Change document details

DETAIL

Actions [Icons] Check out Change document details [Cancel] [Save]

* Document No. [?](#)
A-BPO-101

* Title
Floor Plan - 1

* Revision: 00 - Rev 00 * Status: IFC - Issued for Construction

* Discipline: ELE - Electrical * Type: DRG - Drawing Category: Select one

From
Jacob Palmer, Colt Contracting

Review status	Date recorded	Date released
Un-Restrained	14-12-2020	14-12-2020

Area: Select one

Revision notes

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You can change the document number to an existing document number as long as the revision and status combination is available. If versioning is enabled, the document number can have the same revision/status combination, and Document uses the uploaded date to order the versions.

4. Click **Save**.

1.9 UPLOADING REVISED DOCUMENTS

You can upload the newest version of a revised document from within the document. By default, the newest revision will be displayed in the Documents Register.

1.9.1 To upload a revised document:

1. Open the document.
2. Select the new revision from the drop-down menu.
3. Click **Attach files** to upload the new file(s).

The screenshot displays the 'Document No. SB735F-25FG Rev. 02 Sta: IFR' interface. The 'Files' section on the left shows a table with one file: 'SB735F-25FG 2.pdf' (pdf, 174 KB). The 'Attach files' button is highlighted with a red box. The main form area includes fields for 'Document No.', 'Title' (2 1/2" Square Slip Base Top / Plate), 'Revision' (02 - Rev 02), 'Status' (IFR - Issued for Review), 'Discipline' (STR - Structural (Min Review)), 'Type' (DRG - Drawing), and 'Category' (Select one). Below these are fields for 'From' (John Smith Houston Contracting), 'Review status' (Released), 'Date recorded' (29-10-2020), 'Date released' (29-10-2020), 'Area' (Select one), 'Revision notes', and 'Remarks'. The footer shows '© 2021 InEight Inc. | v.21.05.00' and the 'INEIGHT' logo.

4. Click **Save**.

1.10 UPLOADING SUPERSEDED DOCUMENT REVISIONS

You can upload a superseded revision of a document from within the document. Before you can upload superseded document revisions, this option must be enabled by an administrator.

1.10.1 To upload superseded document revisions:

1. Open the document.
2. Select the new revision from the drop-down menu.

3. Click **Attach files** to upload the new file(s).

Document No: SB735F-25T-G Rev. 02 Sts: IFR

DETAIL LINKS COMMENTS FILE VIEWER USER ACCESS REVIEW STATUS TRANSMITTAL HISTORY

Actions Check out Change document details

Files

No file has been selected. Please select a file to preview.

0 of 1

Attach files

File name	Extension	Size
SB735F-25T-G 2.pdf	pdf	174 KB

* Document No. SB735F-25T-G

* Title 2 1/2" Square Slip Base Top / Plate

* Revision **02 - Rev 02** * Status IFR - Issued for Review

* Discipline STR - Structural (Man Review) * Type DRG - Drawing Category Select one

From John Smith, Houston Contracting

Review status	Date recorded	Date released
Released	29-10-2020	29-10-2020

Area Select one

Revision notes

Remarks

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4. Click **Save**.

5. A prompt is shown to ensure that you are aware you are uploading a Superseded revision.

- If the document is not under review or if the Allow superseding document under review when processing holding area documents setting is not selected, click **Yes** to proceed.
- If the document is under review and the Allow superseding documents under review when processing holding area document is selected, the prompt lists the documents that are currently under review. Select the documents you want to supersede, and then click **Supersede**.

NOTE

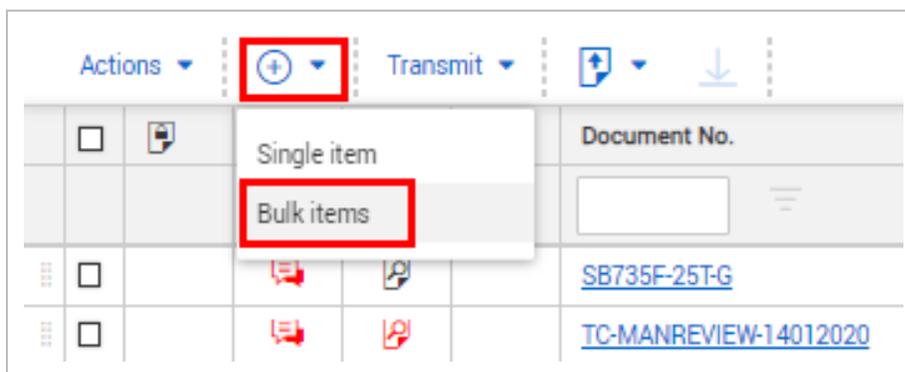
- Documents can be superseded using **Bulk upload**, just use the tick boxes to indicate that the documents are superseded revisions.
- To upload superseded revisions from InEight Document mobile apps or XL-Upload, add a suffix of ** to the Document number. In this case there will be no warning a superseded 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.

1.11 UPLOADING DOCUMENTS IN BULK

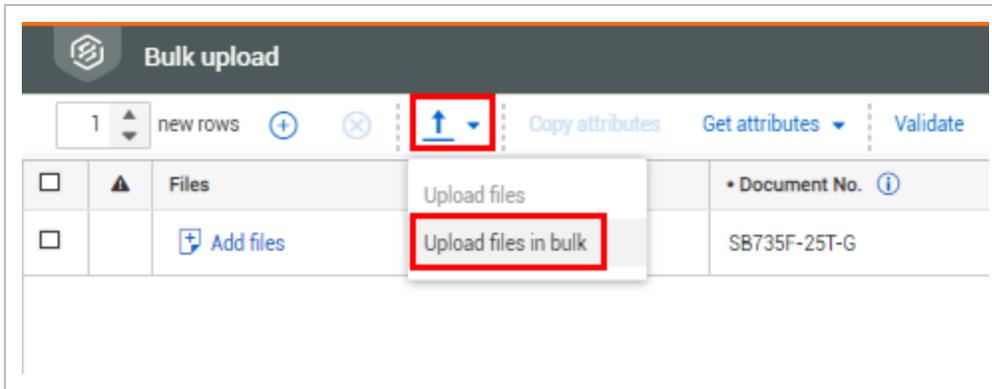
Easily upload lots of documents using the bulk upload feature.

1.11.1 To upload documents in bulk:

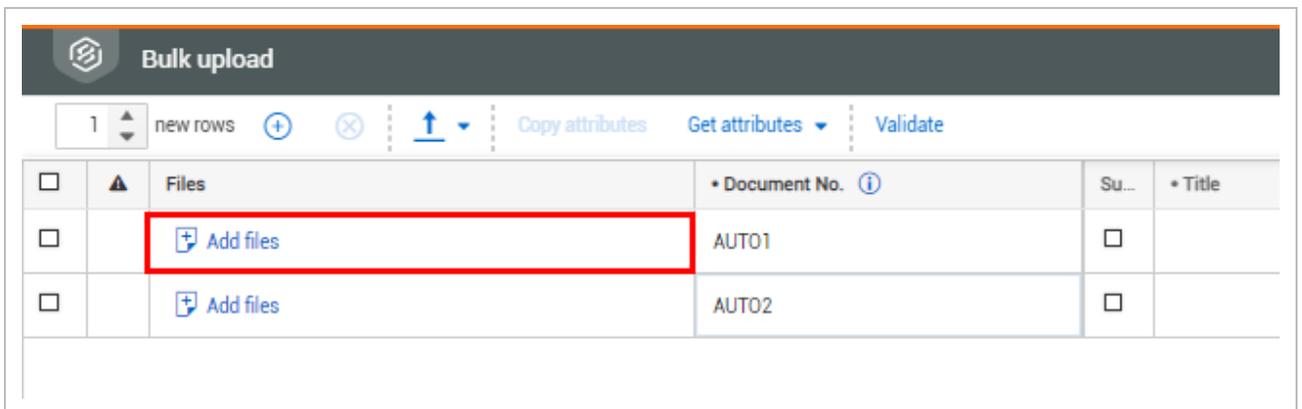
1. Click the **plus icon** and select **Bulk items**.



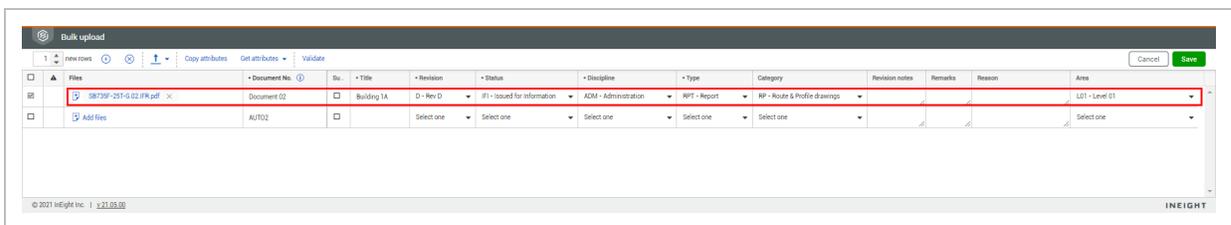
2. Click the **upload icon** and select **Upload files in bulk**. New rows will automatically be added for each file you upload.



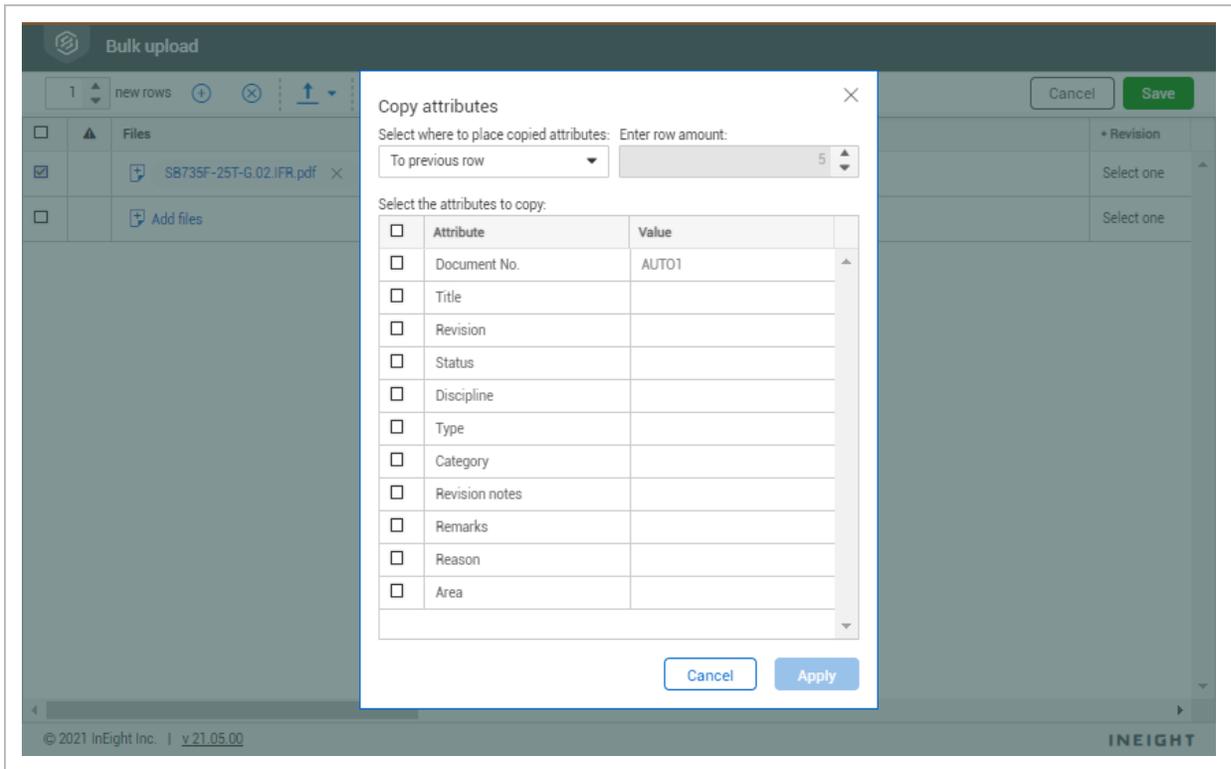
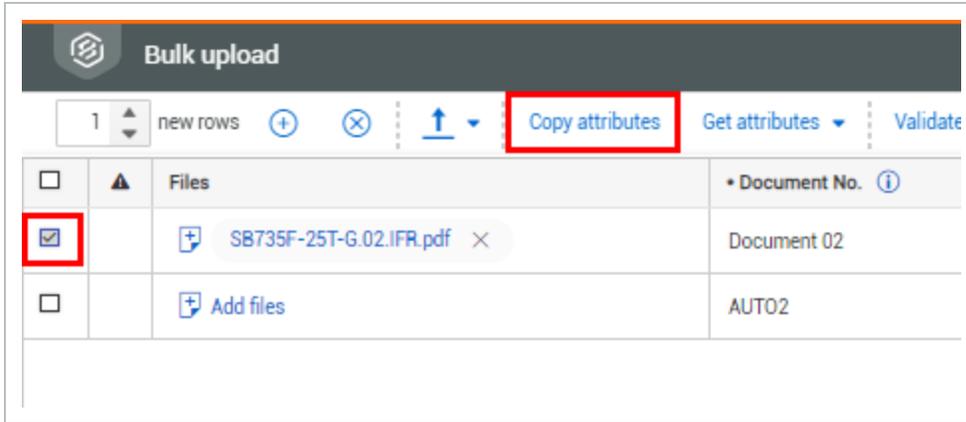
3. If you need to add multiple files to a document, click **Add files**. You can upload multiple files for each document they are different file formats.



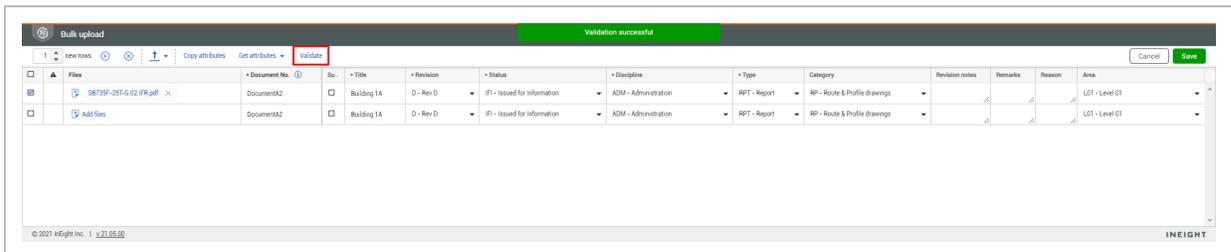
4. Enter in the details for the first document.



5. If the documents being uploaded have similar details, click the **Copy attributes** and select which details you want to copy to each row.



6. Click **Validate** to check all fields have been entered.



7. Click **Save**.

- Click **Yes** to create a transmittal for the saved documents.
- Click **No** to return to the Documents Register.

NOTE

- If you select a document in the Register before selecting **Bulk upload**, the details of that document will be displayed in a row. You can edit the details as needed.
- If you're uploading revised documents, select the documents in the Register before selecting **Bulk upload**. You can edit the revision number and attach new files.
- If you click **Validate** and there is an error, the incorrect fields will be displayed in red so you can edit them as required.
- To delete a row, select the document and click the **cross icon**.
- Click **Get Attributes** to retrieve document details from previous revisions already uploaded to the Register.
- If the Enable OCR PDF's on document upload project setting has been enabled, a batch process runs every 15 minutes and automatically applies optical character recognition (OCR) to PDF files.

1.12 EXPORT FOLDERS

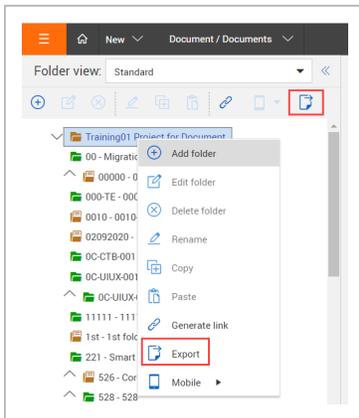
To assist in project handover of documents incrementally, an export option is available on the document register. This export function packages the relevant files and provides a cover sheet with navigational links and an associated Microsoft Excel spreadsheet with the folder structure data and document details. The cover sheet provides a table of contents that has links to each document in the folder. The metadata sheet shows the Excel export of the document metadata.

1.12 Step by Step 1 — Export a folder

Export a folder and all its contents when you need to download the entire folder to your desktop. As folder structures can contain large amounts of data, a download link will be provided in a notification.

Folder export is for standard and smart folders only.

1. Select a folder in the folder structure and select the **Export** icon. Alternatively, you can right-click the folder, and then select **Export** from the menu.



The Export Details dialog box opens.

2. Add a title and a description of the export, and then indicate whether to include a cover sheet and metadata sheet in the export.

Export Details

Export title:

Export short description:

Include cover sheet Include document meta data sheet

Select file types: ⓘ

PDF MSO DWG Other

Cancel Export

3. Select the file formats that must be included in the export. Multiple file types can be included in the export.
4. Click **Export**. The export is prepared in the background as a ZIP file.

After the export has completed, a notification is sent with a link to download the zip file.

CHAPTER 2 – WORKING WITH DOCUMENTS

The Documents Register makes working with documents easy. You can perform a number of actions on documents after they are uploaded into the Documents Register.

See the links below for information on how to work with documents.

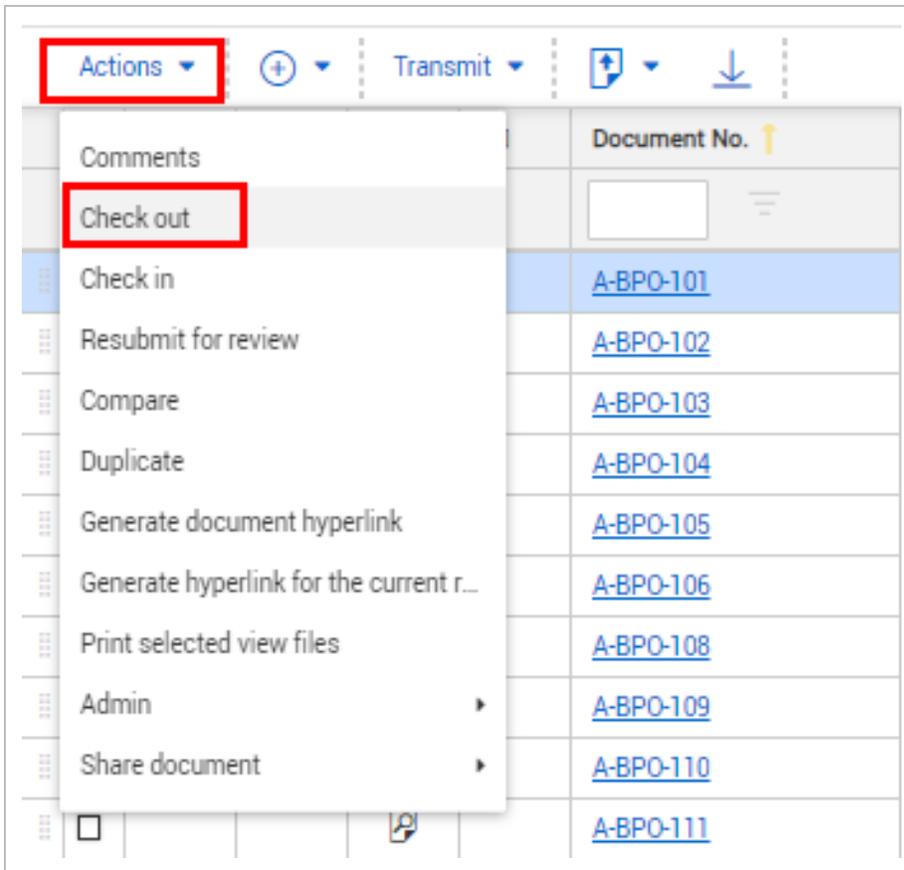
2.1 CHECKING OUT AND CHECKING IN DOCUMENTS

The check out functionality can be used for various reasons, such as when documents need to be placed on hold if they have been released too early. This prevents other users from downloading the document while it is being updated.

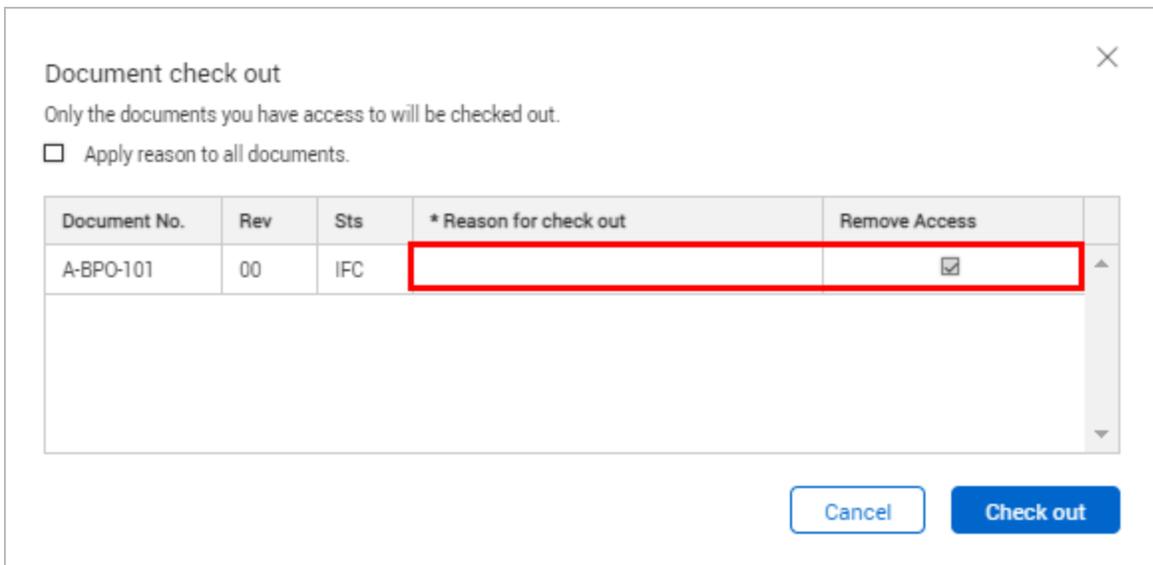
After any changes are completed the document can be checked in, meaning users can download it again.

2.1.1 To check out a document:

1. Select the document.
2. Click **Actions** and select **Check out**.



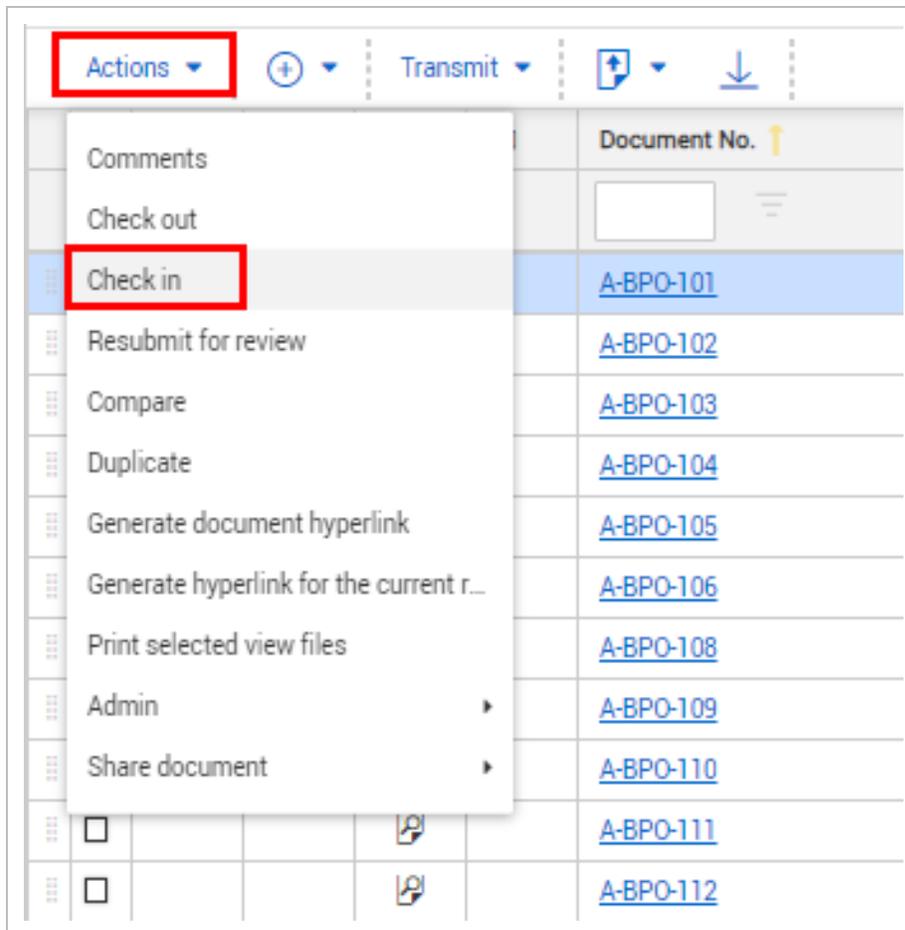
3. Enter a reason for checking out the document.
4. If you want to completely remove access to the document (and while it's checked out, select the **Remove Access** check box).



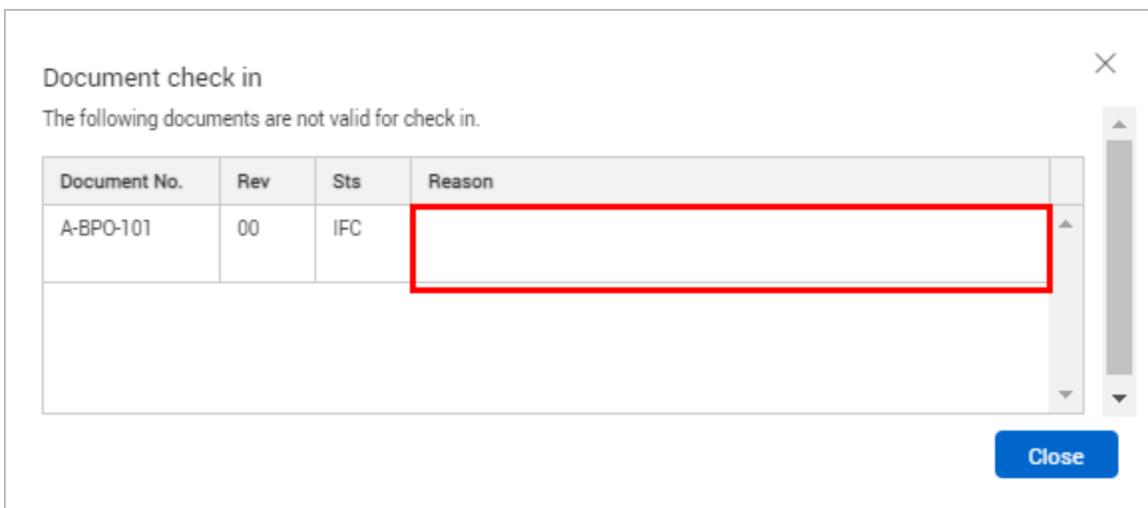
5. Click **Check out**.
6. Click **Yes** to confirm.

2.1.2 To check in a document:

1. Select the document in the Register.
2. Click **Actions** and select **Check in**.



3. Enter the reason for checking in the document.



4. Click **Check in**.
5. Click **Yes** to confirm.

NOTE

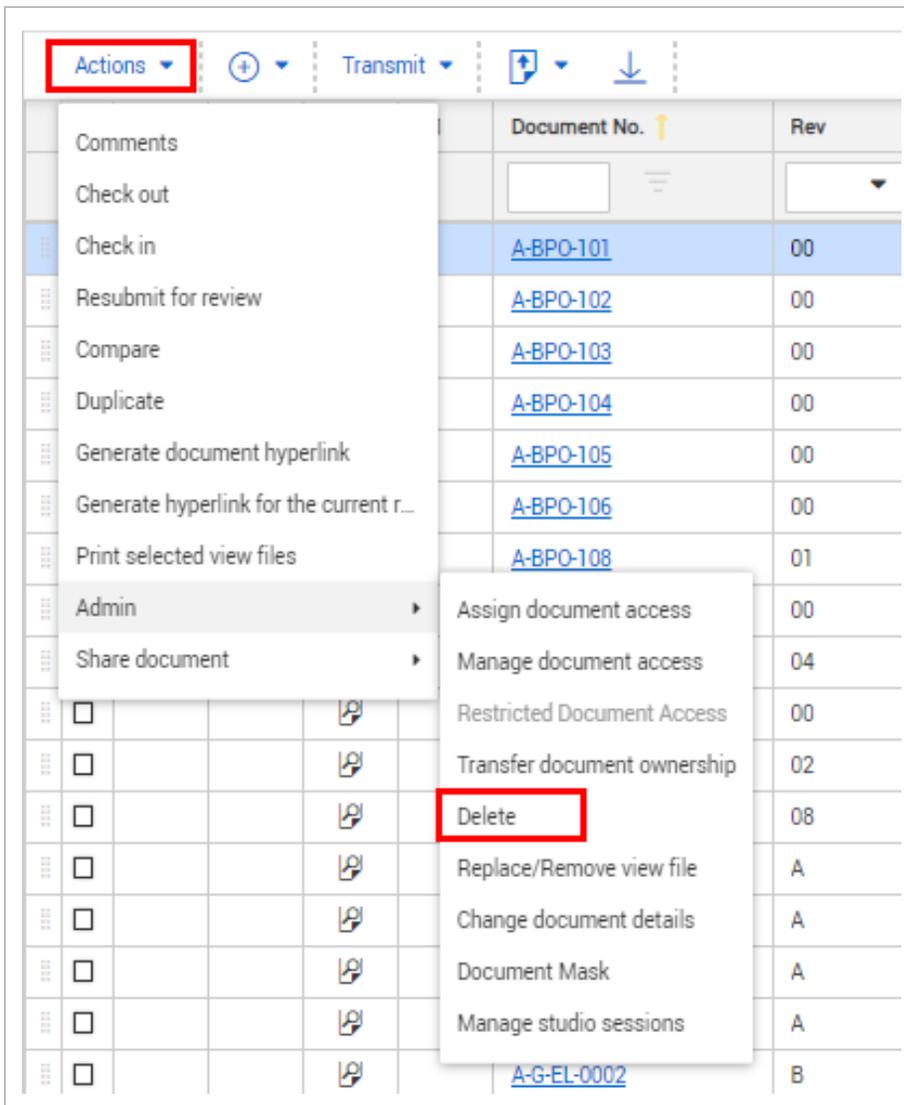
- Documents that are checked out will have a **padlock icon** displayed next to them in the Register.
- Documents can also be checked out from the document details window.

2.2 DELETING DOCUMENTS

There are times where documents may need to be deleted from the Document Register. You can delete documents through the Admin menu if you have access to this function.

2.2.1 To delete a document:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Delete**.



4. Enter a reason for the deletion.

Document deletion ✕

The following documents were selected for deletion. Enter a reason as to why they are to be deleted.

Apply reason to all documents.

Document No.	Rev	Sts	Current history	* Reason for deletion
A-BPO-101	00	IFC	View history	

Notify all the users who have access to these documents about the deletion.

Cancel
Delete

5. If you want to apply the same reason to all documents, select the first check box.
6. If you want to notify all users who have access to the document, select the second check box.
7. Click **Delete**.
8. Click **Yes** to confirm.

NOTE

- The **View history** link can be used to see if the document has been transmitted to anyone or included in any packages.
- Use the reports module to view a full audit history of any deleted documents. The report will show who deleted the document, when and why.

2.3 RESTORE DELETED VIEW FILES AND COMMENTS

There are times when a deleted document needs to be restored to the Documents register. If you have the proper security group permissions, you can restore deleted files and comments. If a document has been deleted within the last 30 days, the document is restored with comments. If it is after 30 days, it is uploaded to the Documents register as a new document.

2.3.1 Restore deleted documents

You can restore a deleted document if a document was deleted accidentally or if you find you need a document that was deleted.

If a document you restored was deleted more than 30 days ago, the New document upload screen is shown with the relevant metadata and the view files. You must add the document as new. The newly added document does not have any previous comments or other associations.

2.4 ADDING COMMENTS TO DOCUMENTS

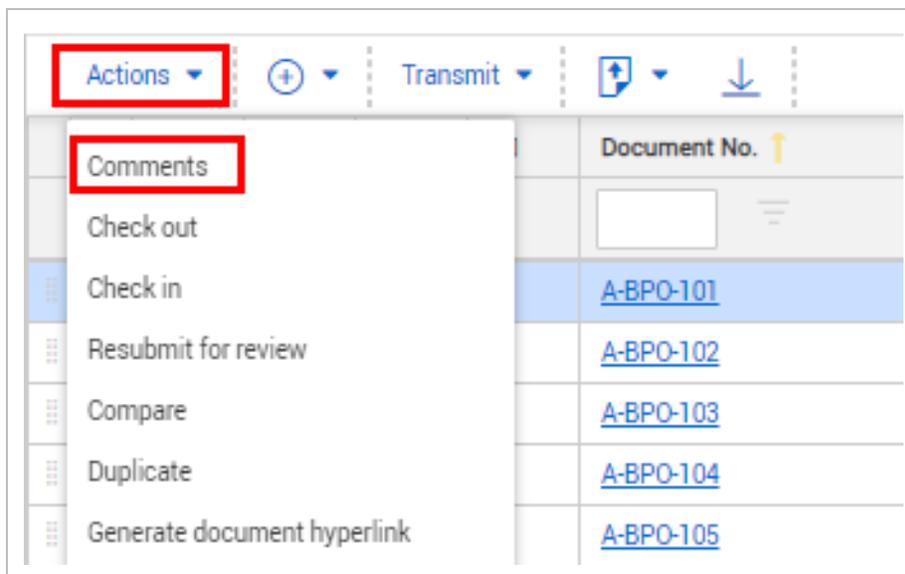
You can add comments to documents and control who can view them.

2.4 Step by Step 1 — Add comments to a document

Summary: Add detailed comments from any document in the documents register.

Considerations: You can control the fields that are present or required at either a comment or comment response level, so you can present different fields as needed. Contact InEight customer support at support@ineight.com for information about configuring different fields for each type.

1. Select the document in the Register.
2. Click **Actions** and select **Comments**.



3. Enter the comment details.

* Comments

FORMAT **B** *I* U [Bulleted List] [Numbered List] [Indent] [Decrease Indent] [Increase Indent] [Right Align]

Category: Select one...

Available to: Company

Raised by company: Select one... Raised by: Select one...

Send document comments to
 Originator Document recipients

Attach files:
+ Attach files Download all Download selected

There are no attachments uploaded.

Cancel Save

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4. Click **Save**.
5. You can optionally attach additional files or download the current files attached to the document.

2.5 COMPARING DOCUMENTS

The Compare feature can be used to compare two documents that you have access to, for example, if you have drawings for HVAC and electrical or two revisions of the same document, you can now see how they align. The two documents are overlaid on each other to enable a side-by-side comparison. You can only compare two files, and they must be of the same format, such as PDF to PDF or DWG to DWG.

When working with 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.

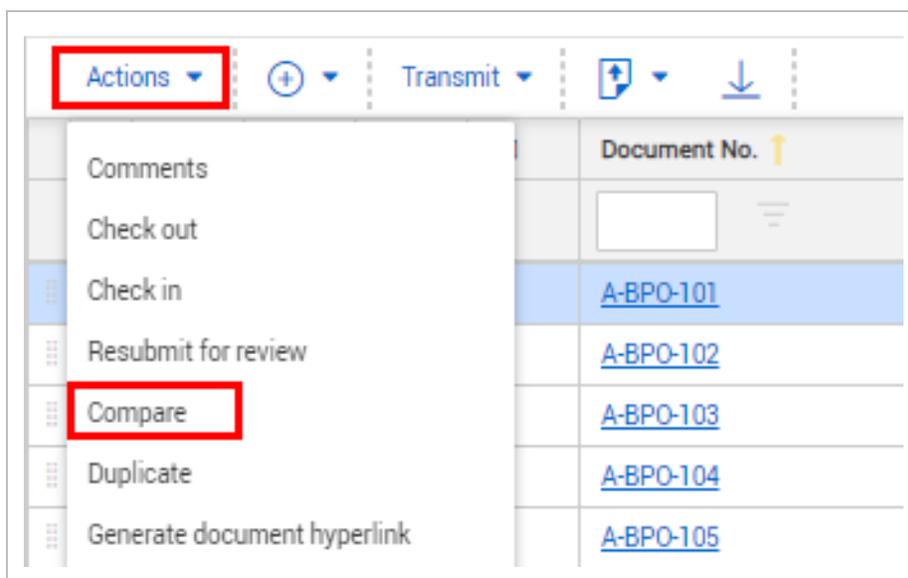
NOTE For large files the comparison can take some time to prepare.

NOTE If a file has been scanned to PDF, it might not line up accurately on top of another scanned file. Ideally the comparison function should be utilised on digitally saved files.

2.5 Step by Step 1 — Compare two different documents

Compare two different documents when you want to see how they align.

1. From the Documents register, select the two documents to compare.
2. Click **Actions**, and then select **Compare**.



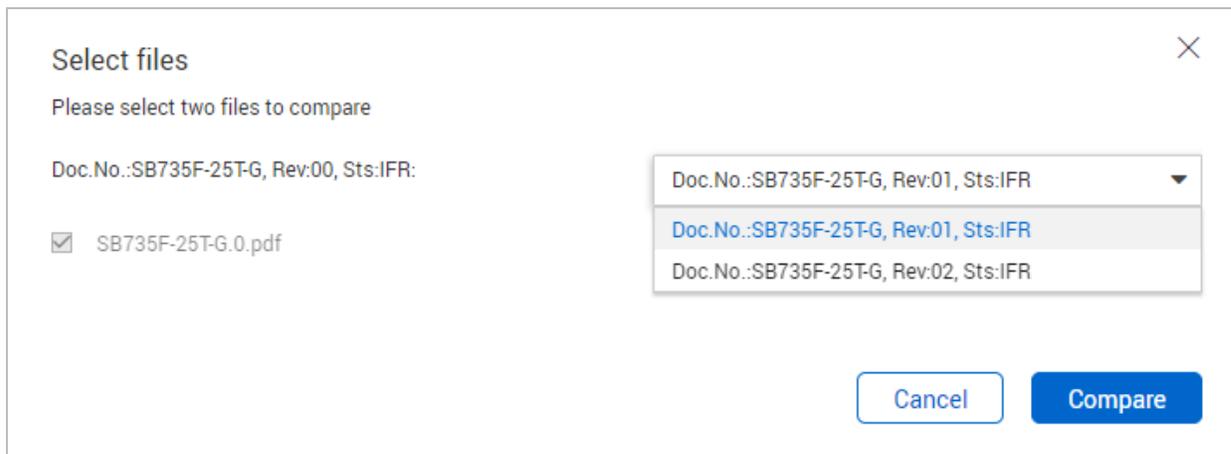
The two documents are shown overlaid in the Viewer.

2.5 Step by Step 2 — Compare two revisions of the same document from the register

When you are in the Documents register, you can access the Compare feature to view two revisions of the same document side by side.

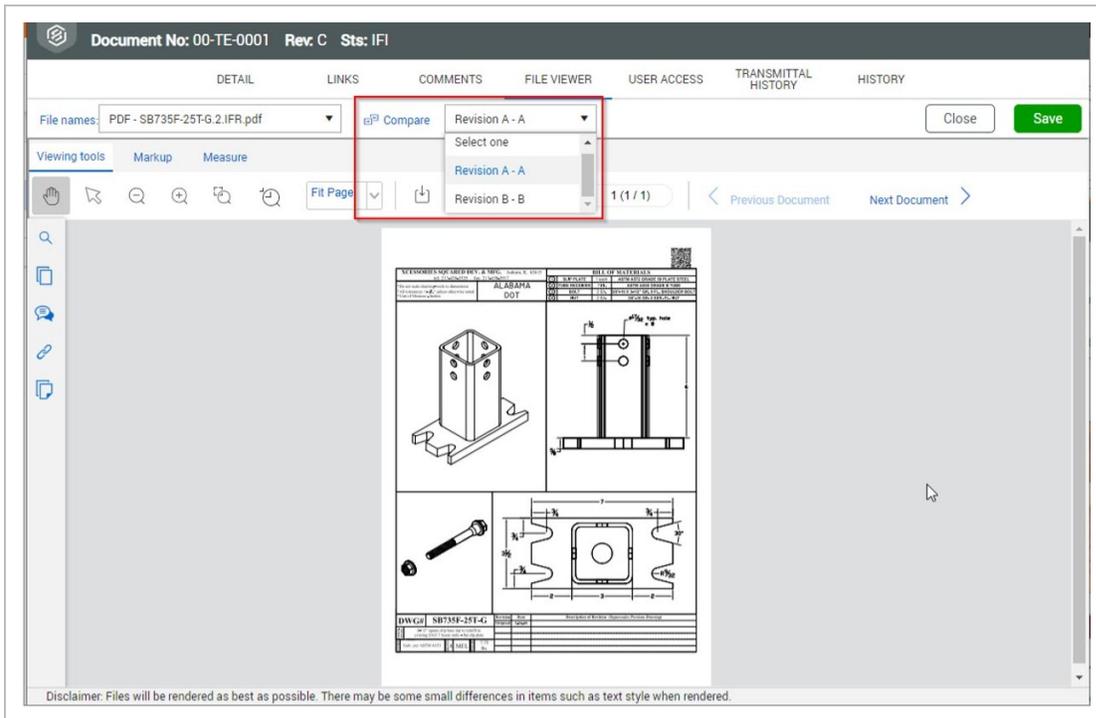
You can only compare two files.

1. From the Documents register, select one or two revisions of a document.
2. Click **Actions**, and then select **Compare**. If you selected two documents, the two revisions are overlaid on top of each other. If you selected only one document, continue with the next step.
3. At the prompt, select another revision of the document, and then click **Compare**.



The two documents are overlaid on top of each other in the Viewer. Items shown in blue indicate the older revision. Items showing in orange indicate the newer revision. Items showing

1. With a document open in the viewer, expand the Compare drop-down list.



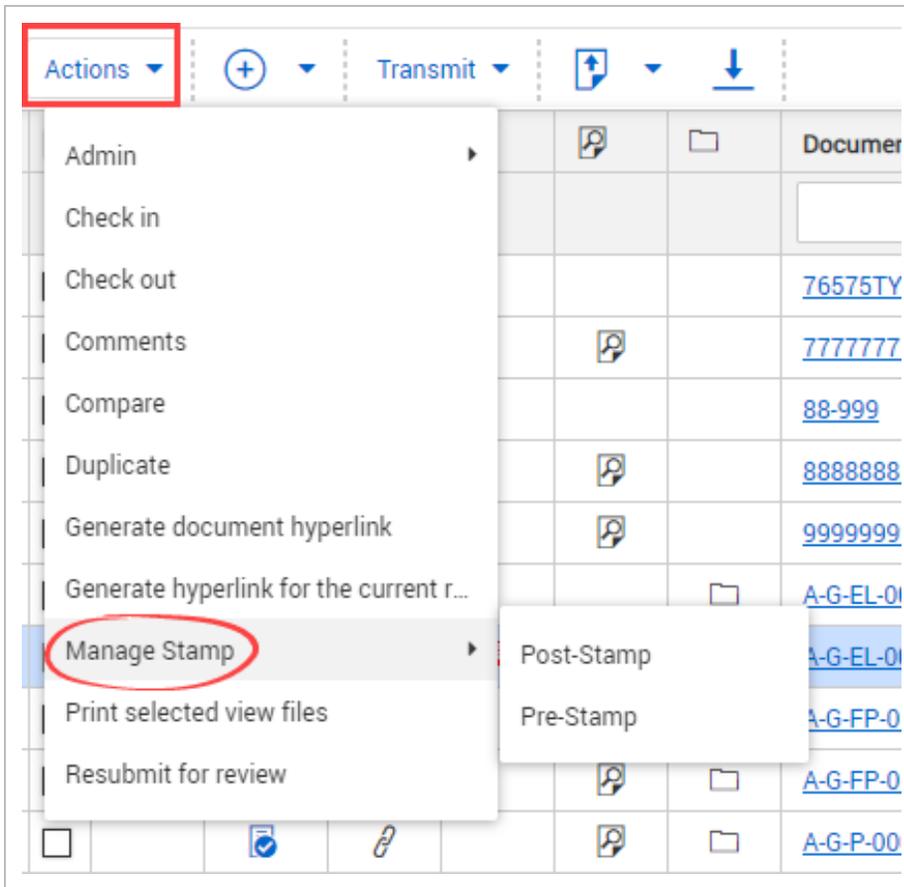
2. Select another revision of the document. The two revisions are overlaid on top of each other in the Viewer. Items shown in blue indicate the older revision. Items showing in orange indicate the newer revision. Items showing in black indicate no change.

2.6 STAMPING DOCUMENTS

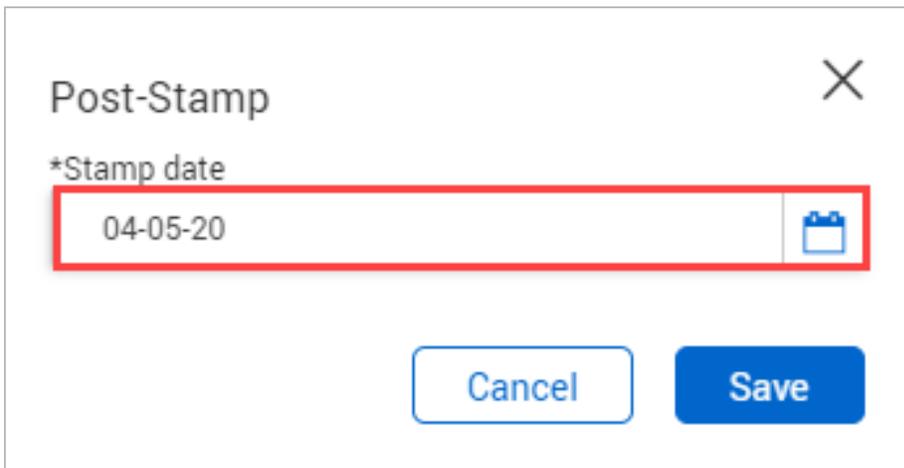
If the Vendor Data module is enabled, you can apply pre-review and post-review stamps to documents.

2.6.1 To post-stamp a document:

1. Click **Actions**.
2. In the **Manage Stamp** menu, select **Post-Stamp**.



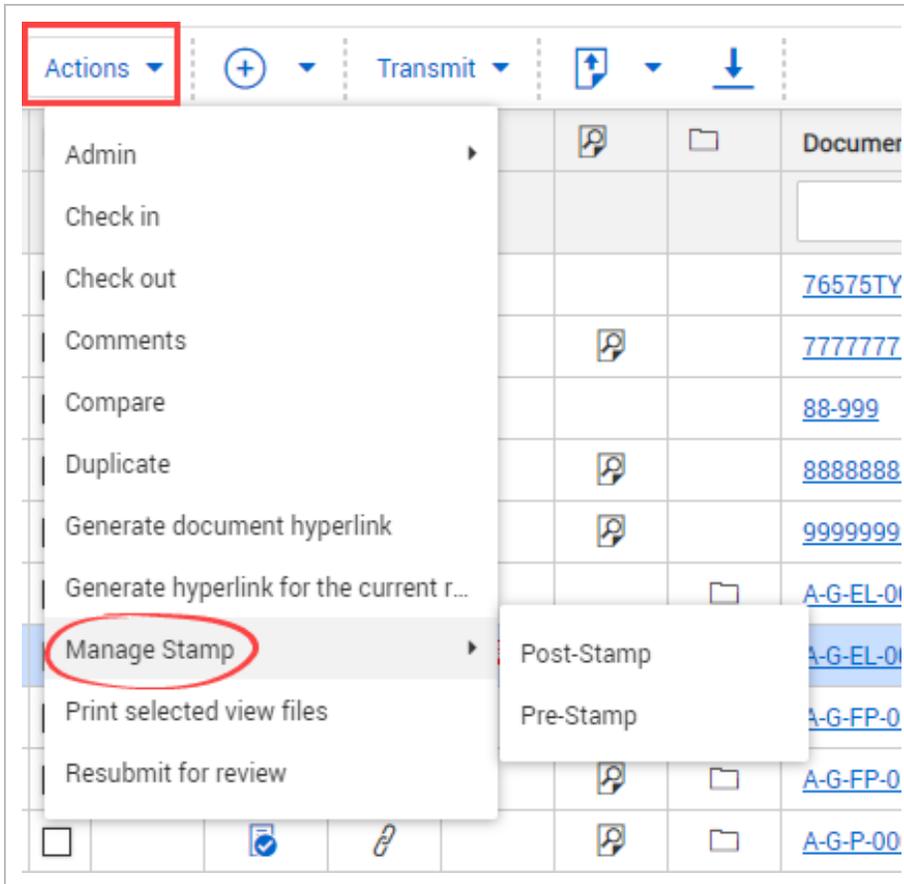
3. Select the date.



4. Click **Save**.

2.6.2 To pre-stamp a document:

1. Click **Actions**.
2. In the **Manage Stamp** menu, select **Pre-Stamp**. The pre-stamp will be applied to the document.

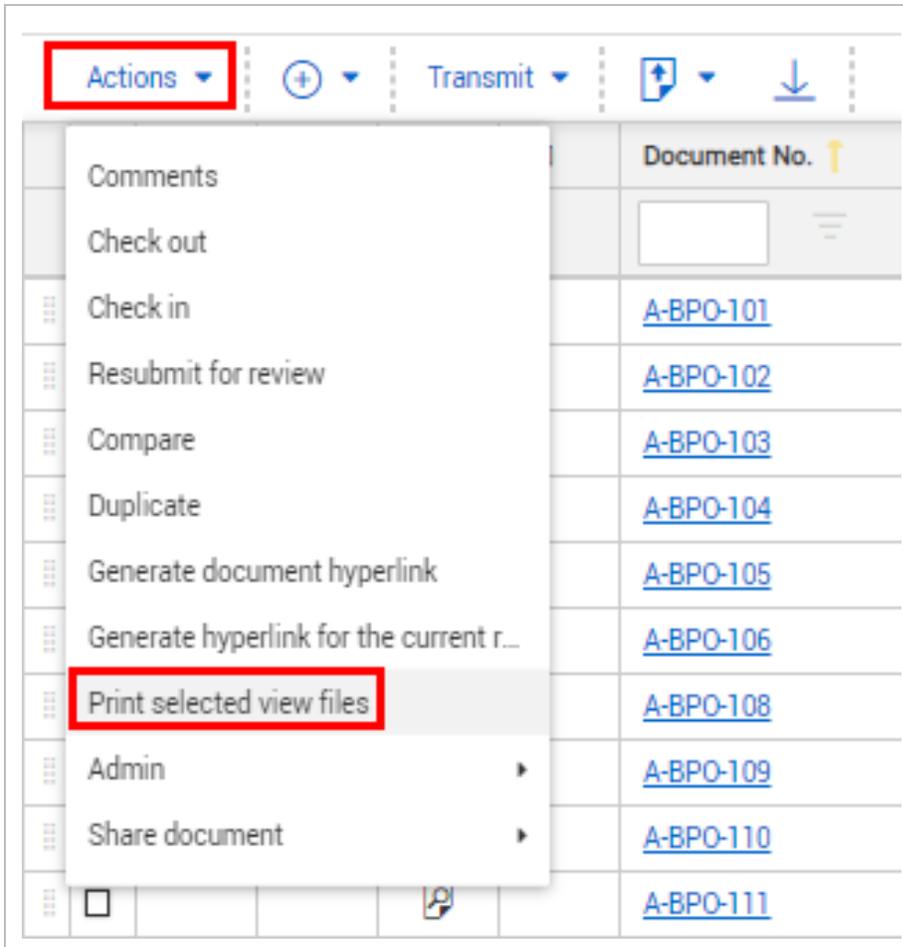


2.7 PRINTING DOCUMENT VIEW FILES

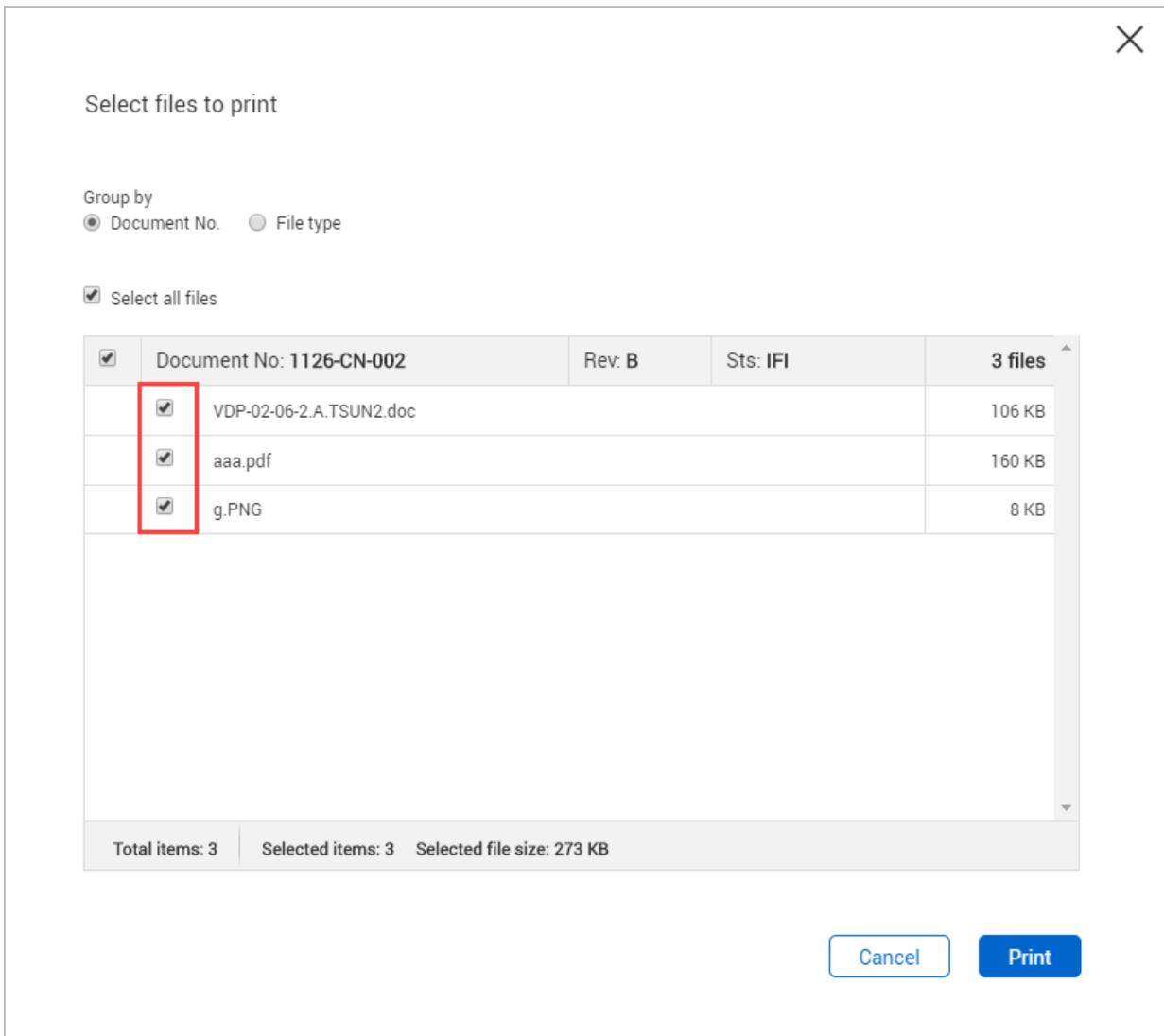
Print document view files directly from the Documents Register.

2.7.1 To print document view files from the Register:

1. Click **Actions** and select **Print selected view files**.



2. Select the view files you want to print.



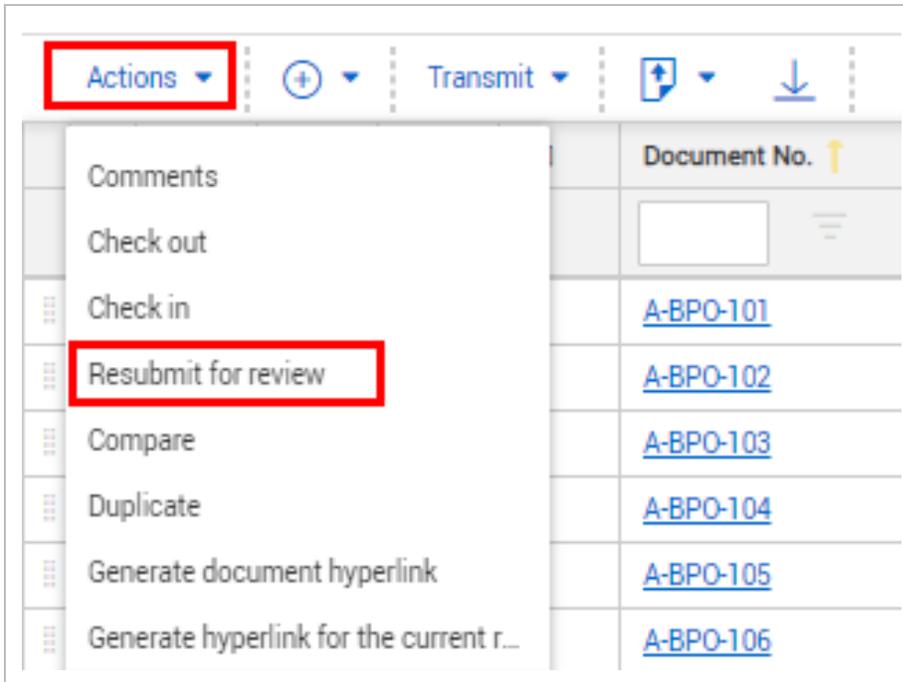
3. Click **Print**.

2.8 RESUBMITTING A DOCUMENT FOR REVIEW

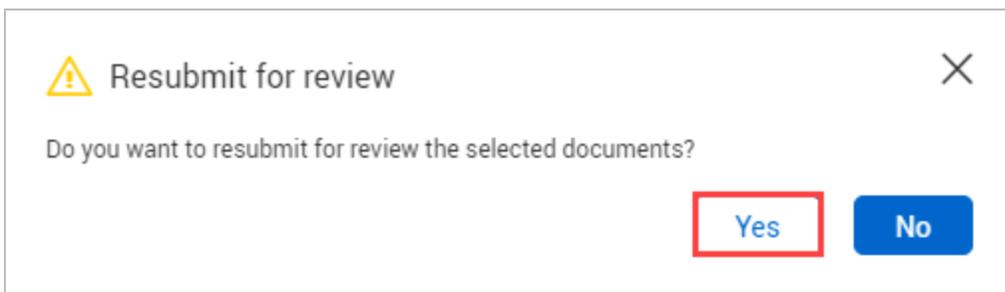
Resubmit documents for review directly from the Documents Register.

2.8.1 To resubmit a document for review:

1. Click **Actions** and select **Resubmit for review**.



2. Click **Yes**.



2.9 FAVORITING DOCUMENTS

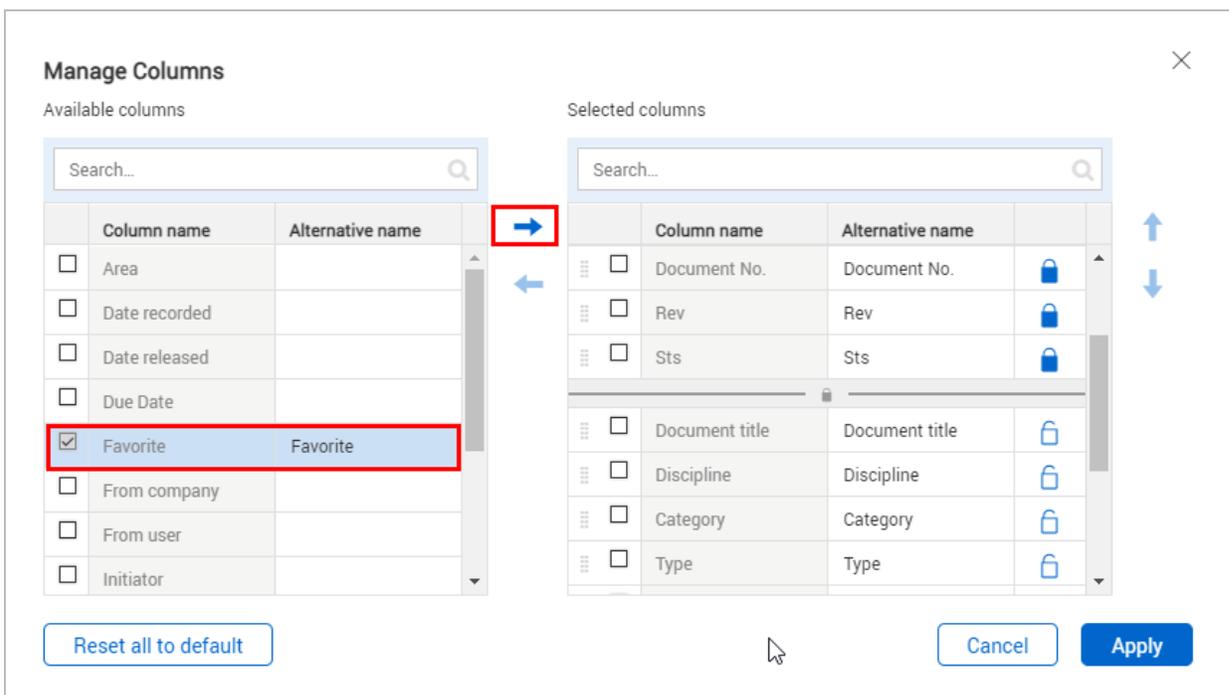
Favorite documents to easily access them.

2.9.1 To access the favorites column:

1. Click Manage columns.



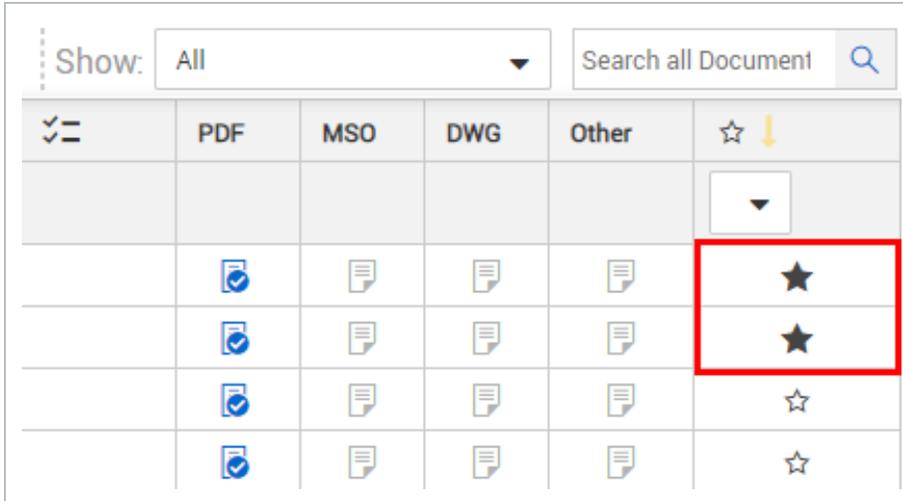
2. Select **Favorites** and click the **arrow icon**.



3. Click **Apply**.

2.9.2 To favorite a document:

1. In the Register, find the document you want to favorite.
2. Click the **favorite icon**.



☰	PDF	MSO	DWG	Other	☆ ↓
					▼
	✓	☰	☰	☰	★
	✓	☰	☰	☰	★
	✓	☰	☰	☰	☆
	✓	☰	☰	☰	☆

2.10 LINK DOCUMENTS MANUALLY

If you are not sure all references in a document were hyperlinked when it was uploaded, you can run the hyperlinking process manually to ensure all references are hyperlinked. Running the hyperlinking process manually also lets you link to references whose document numbers did not exist when you first uploaded the document

To run the hyperlinking process, select one or more documents in the Documents register, and then select **Bulk link PDFs** from the **Actions** menu. A notification briefly shows that the request has been submitted successfully. The document hyperlinking process runs in the background.

CHAPTER 3 – MANAGING DOCUMENTS

The Documents Register makes managing documents easy. You can manage documents by performing different actions on them.

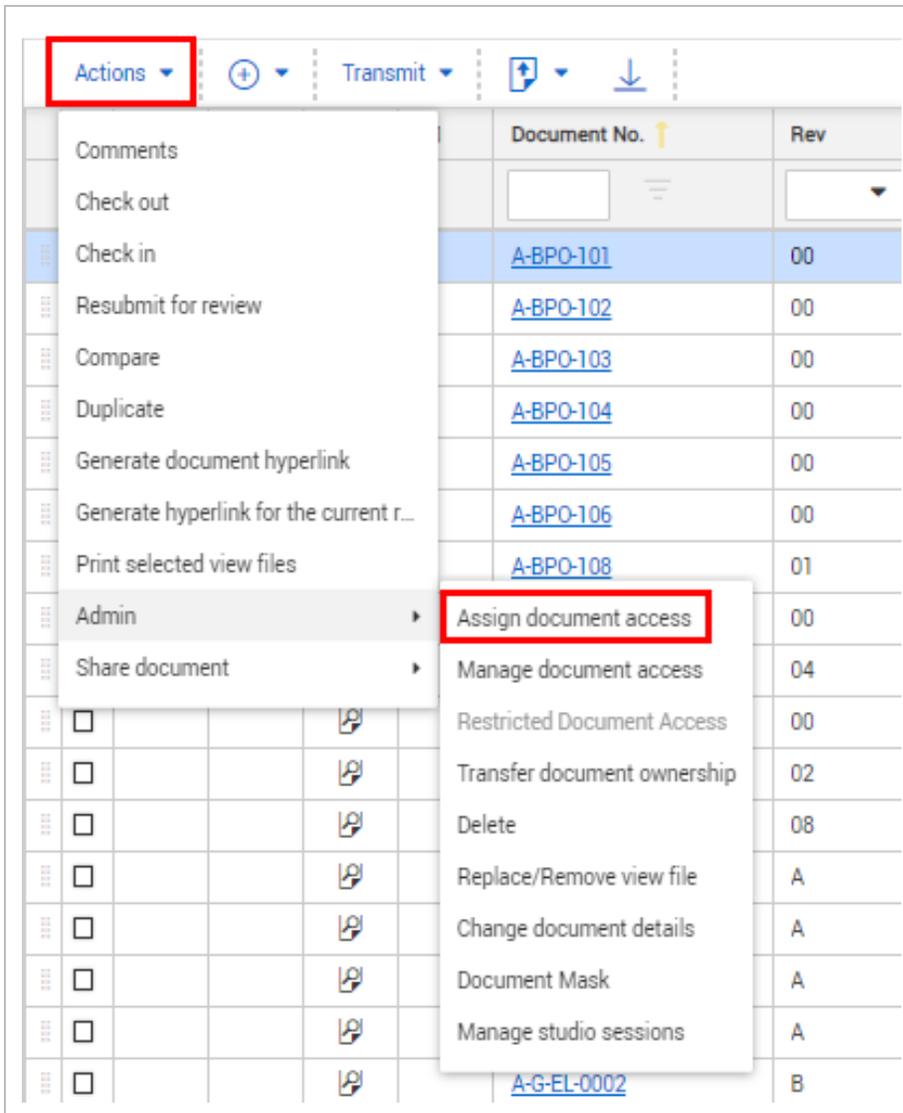
See the links below for information on how to manage documents.

3.1 ASSIGNING ACCESS TO DOCUMENTS

Project or company administrators can give access to a specific document or document format. This ability is also available to users within a security group that has this security access function allowed.

3.1.1 To assign access to a document:

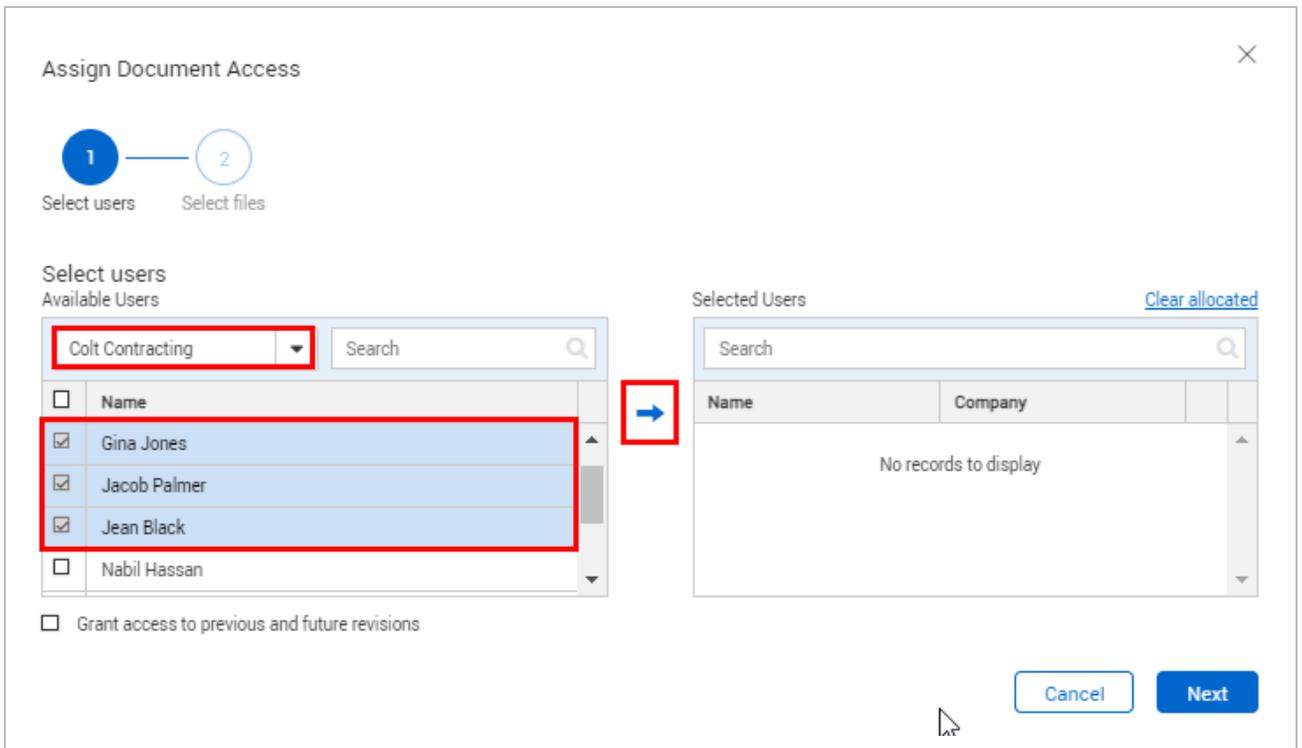
1. Select the document in the **Register**.
2. Click **Actions**.
3. In the **Admin** menu, select **Assign document access**.



The screenshot shows a software interface with a table of documents. The 'Actions' menu is open, and the 'Assign document access' option is highlighted. The table has columns for 'Document No.' and 'Rev'. The 'Document No.' column contains document IDs like A-BPO-101, A-BPO-102, A-BPO-103, A-BPO-104, A-BPO-105, A-BPO-106, A-BPO-108, and A-G-EL-0002. The 'Rev' column contains revision numbers like 00, 04, 08, A, and B.

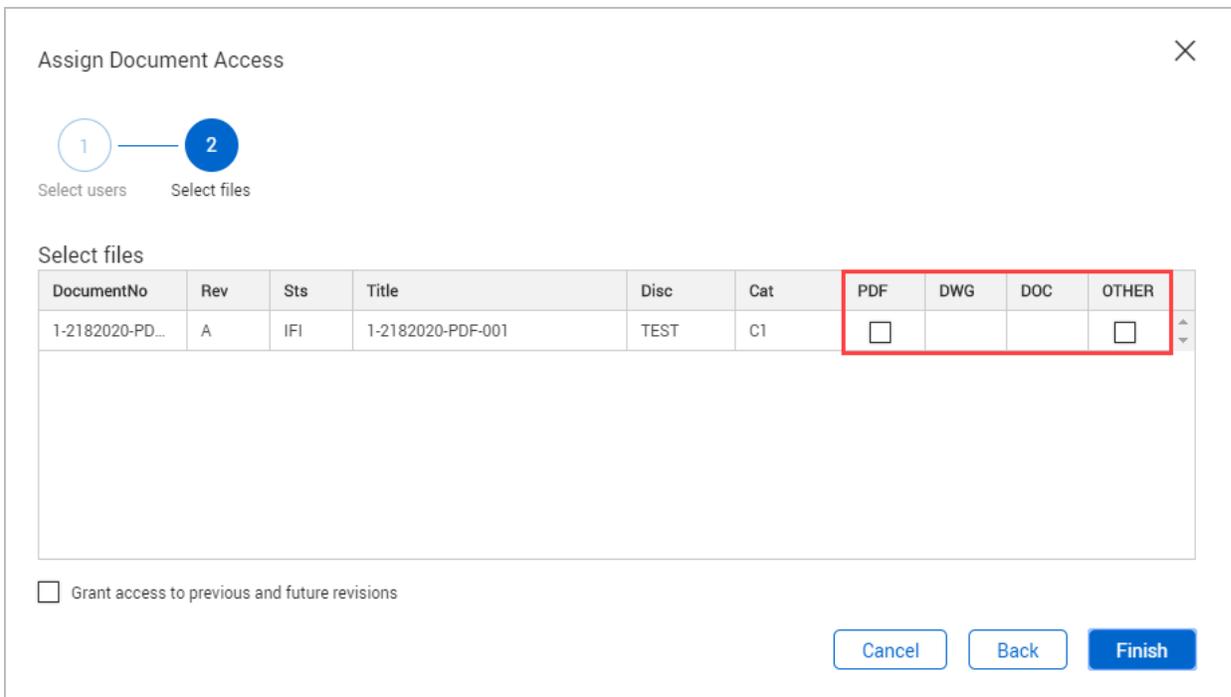
	Document No. ↑	Rev
	A-BPO-101	00
	A-BPO-102	00
	A-BPO-103	00
	A-BPO-104	00
	A-BPO-105	00
	A-BPO-106	00
	A-BPO-108	01
		00
		04
		00
		02
		08
		A
		A
		A
		A
	A-G-EL-0002	B

4. Select the company.
5. Select the contact and click the **arrow icon**.



6. Click **Next**.

7. Select the formats you want the document to be available in.



8. Click **Finish**.

NOTE

The option to allow users to automatically get access to future revisions can be removed from the system completely if required. Contact InEight for details.

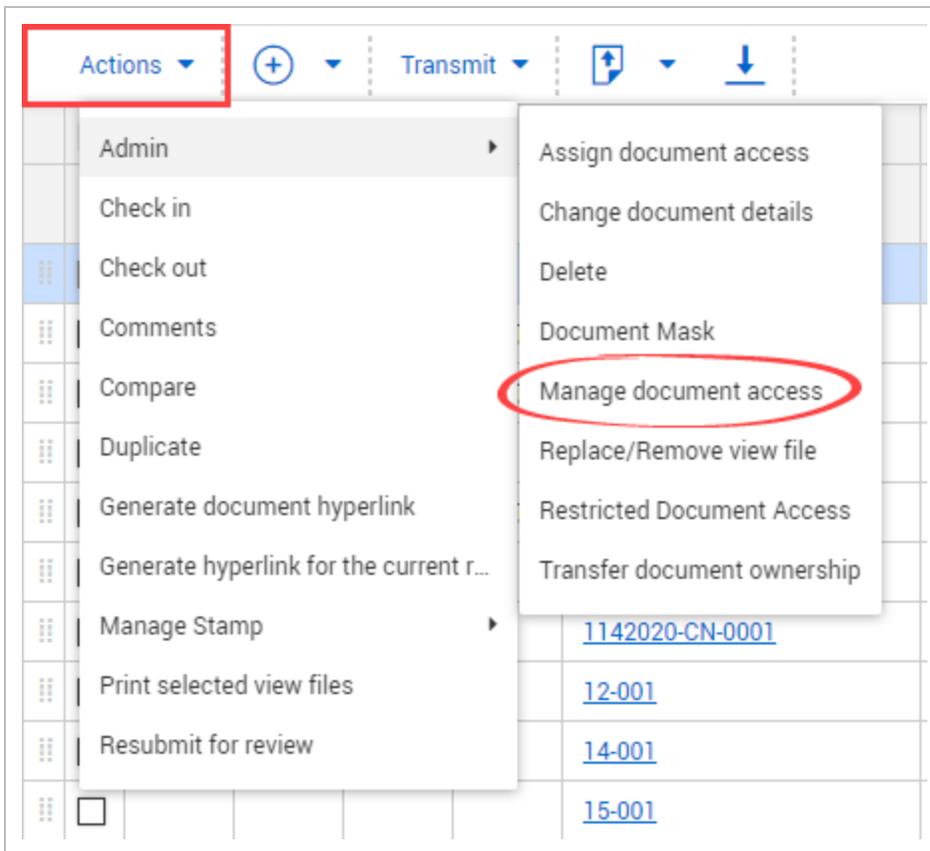
3.2 MANAGING DOCUMENT ACCESS

Users who have gained access to documents in InEight Document via transmittals get access to new revisions of the same documents by default, unless **Notify recipients of future revisions** was not selected.

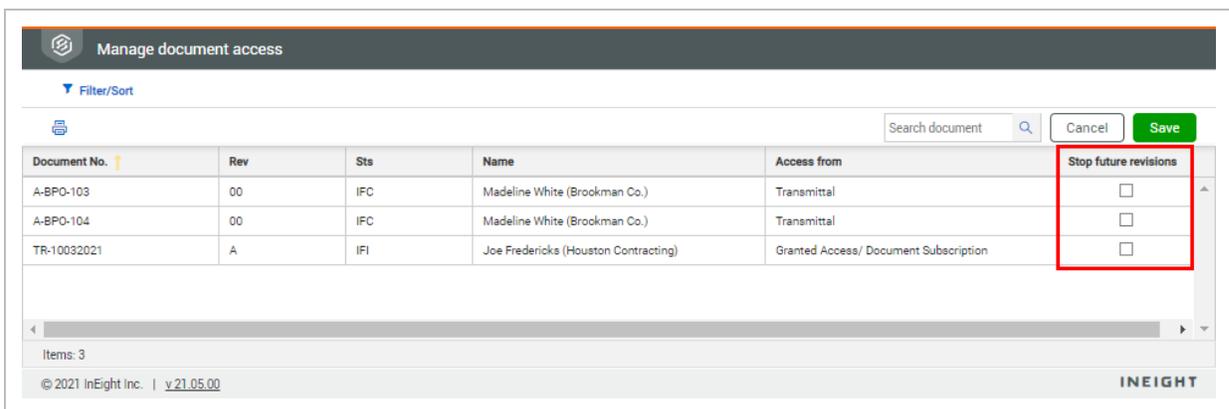
A user's access to future revisions of one or more documents can be removed using the manage document access function.

3.2.1 To remove access to future revisions of a document:

1. Select the document in the Register.
2. Click **Actions**.
3. In the **Admin** menu, select **Manage document access**.



4. Select the check boxes of the users you want to remove access to.



5. Click Save.

NOTE When selecting Stop future revisions, this will also stop the user from getting access to future revisions of documents to which they received access via subscription or by the project administrator granting them access.

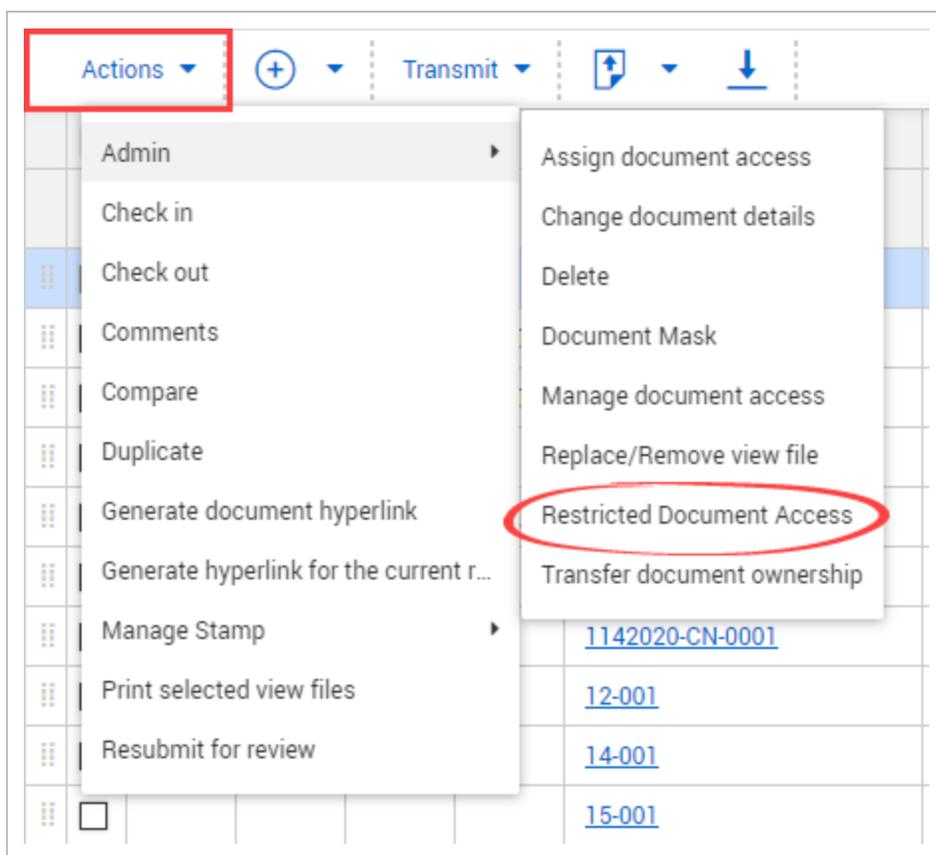
3.3 MANAGING RESTRICTED DOCUMENTS

Sensitive documents can be hard to manage and require special clearances for access. This functionality lets administrators define which documents are restricted from the typical project configured access and security settings and which users are authorized to view them. For example, documents governed by the restricted document filter will not be subject to applicable distribution rules that may also affect this document. Once defined, those documents cannot be transmitted to unauthorized users.

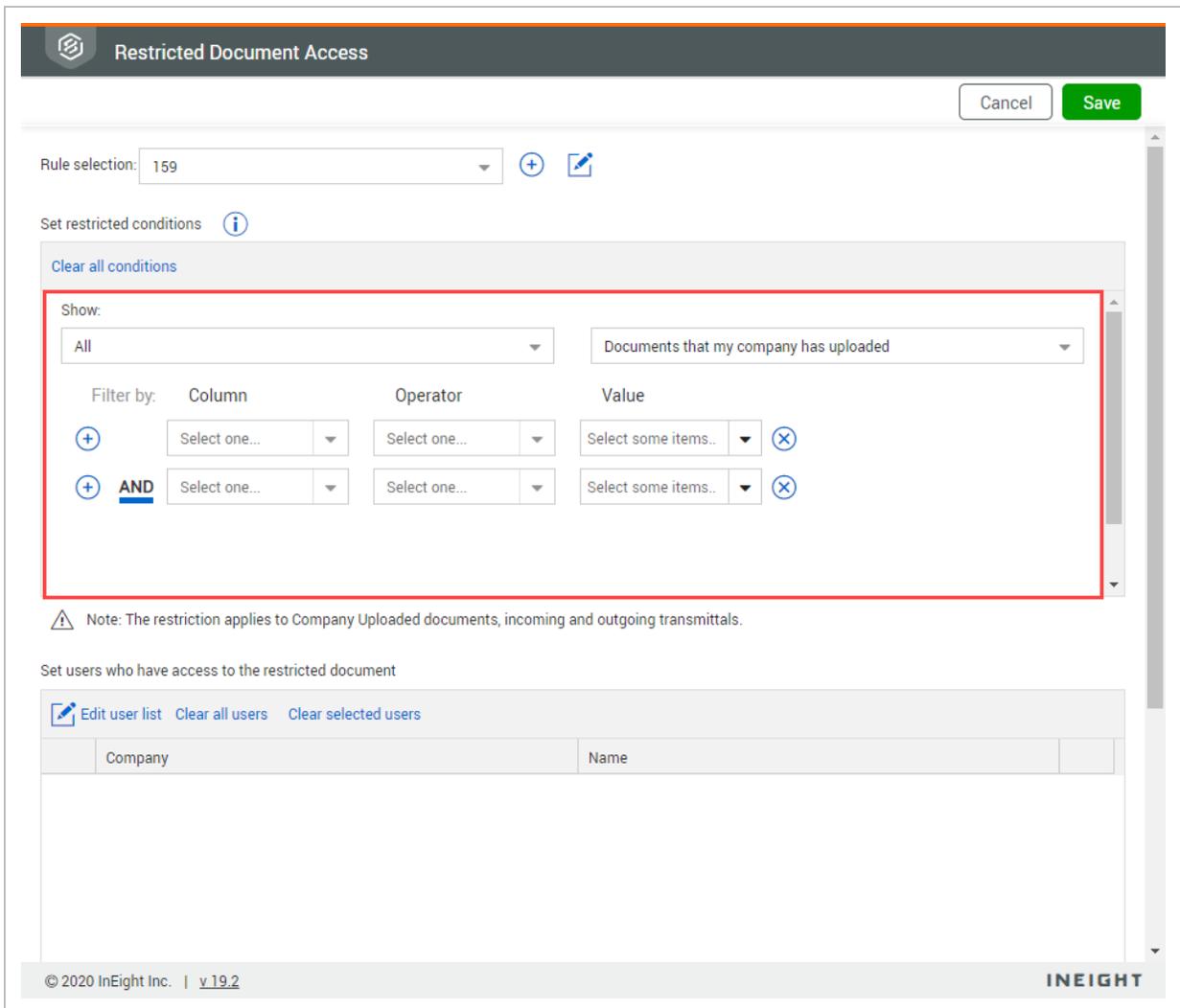
If you are interested in enabling this on your project, contact support@ineight.com.

3.3.1 To restrict document access:

1. Select the document in the **Register**.
2. Click **Actions**.
3. In the **Admin** menu, select **Restricted Document Access**.



4. Set the restricted conditions for the document.



5. Click **Edit user list**.
6. Select the company.
7. Select the contact and click the **arrow icon**.

Select contacts

* Display: All contacts Contact groups Roles

Select contacts to have access to restricted document

19.1 Company Search

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	SD SD

→

Contacts allocated to have restricted access [Clear allocated](#)

Search

Name	Company
No records to display	

Cancel Apply

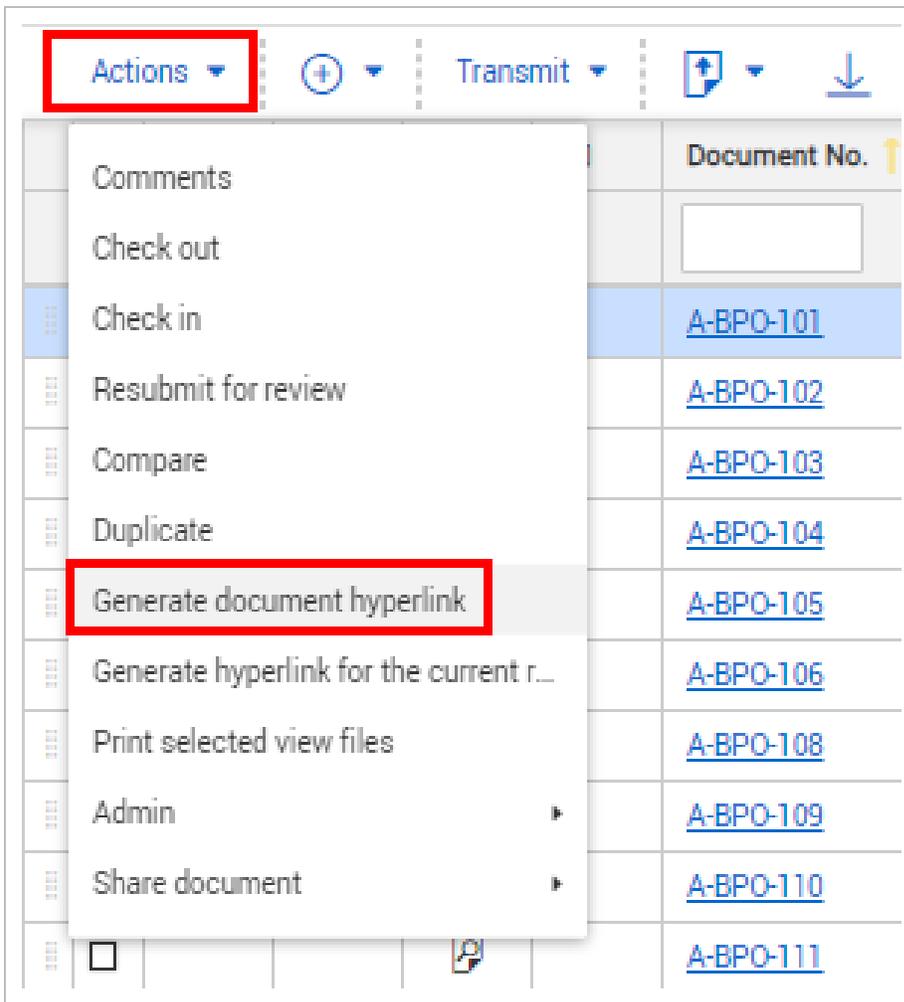
8. Click **Apply**.
9. Click **Save**.

3.4 GENERATING DOCUMENT HYPERLINKS

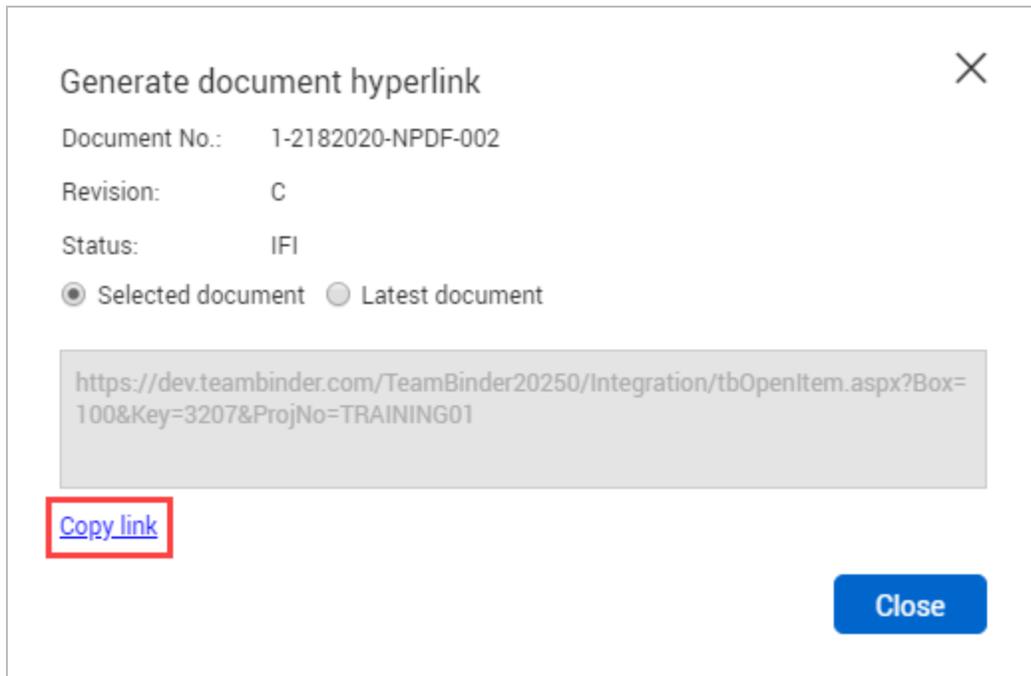
A hyperlink to a document can be sent to another user that will take them directly to the document.

3.4.1 To generate a document hyperlink:

1. Select the document in the **Register**.
2. Click **Actions** and select **Generate document hyperlink**.



3. Click **Copy link**.



Generate document hyperlink

Document No.: 1-2182020-NPDF-002

Revision: C

Status: IFI

Selected document Latest document

<https://dev.teambinder.com/TeamBinder20250/Integration/tbOpenItem.aspx?Box=100&Key=3207&ProjNo=TRAINING01>

[Copy link](#)

Close

4. Click **Close**.

NOTE

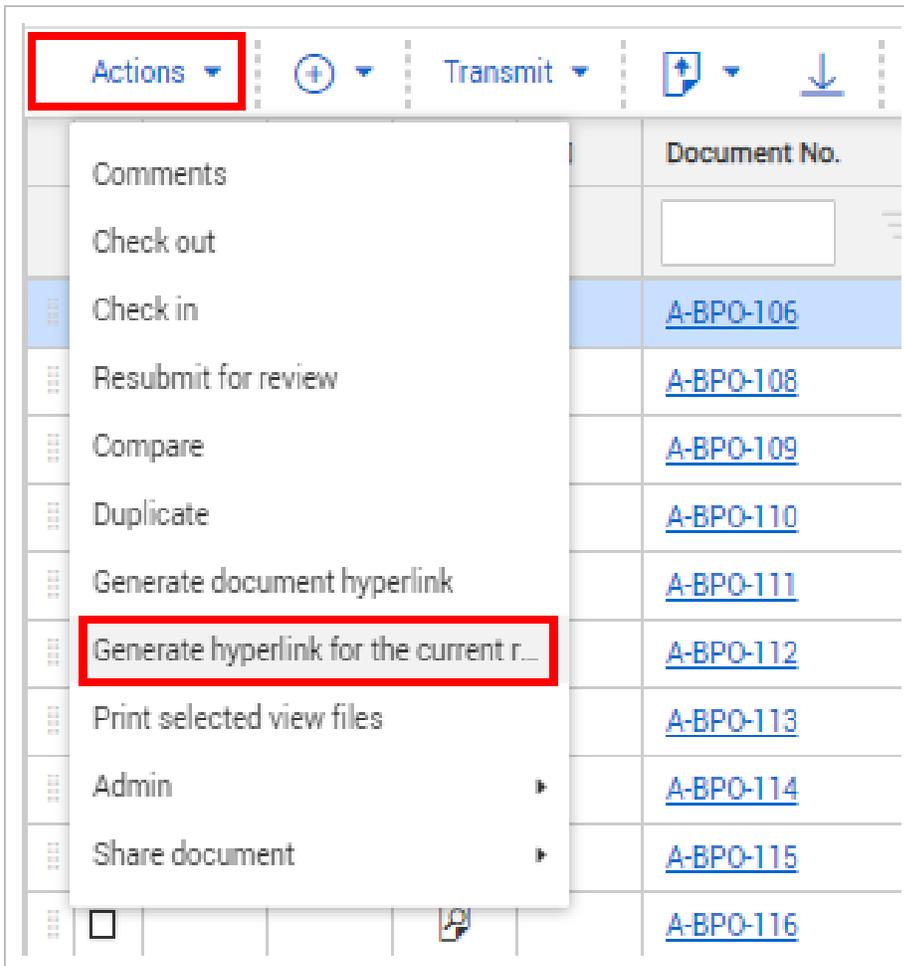
- The recipient of the hyperlink must have access to the document.
- The recipient of the link must log in to InEight document to view the document.
- Generate a hyperlink for the current Register view by selecting **Generate hyperlink for the current Register**. This will show the latest documents uploaded to the Register that the user has access to.

3.5 GENERATING A HYPERLINK FOR THE CURRENT REGISTER

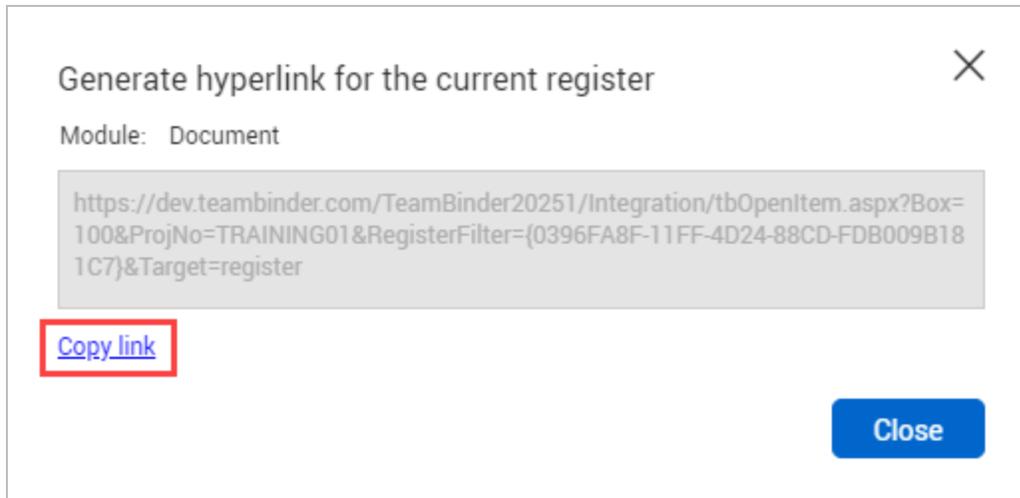
A hyperlink to the current **Documents Register** can be sent to another user that will take them directly to the current Register view.

3.5.1 To generate a hyperlink for the current Register:

1. Click **Actions** and select **Generate hyperlink for the current Register**.



2. Click **Copy link**.



3. Click **Close**.

3.6 REPLACING AND REMOVING VIEW FILES

Replace and remove document view files to keep documents up to date.

3.6.1 To replace a view file:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Replace/Remove view file**.

Replace/Remove view files ✕

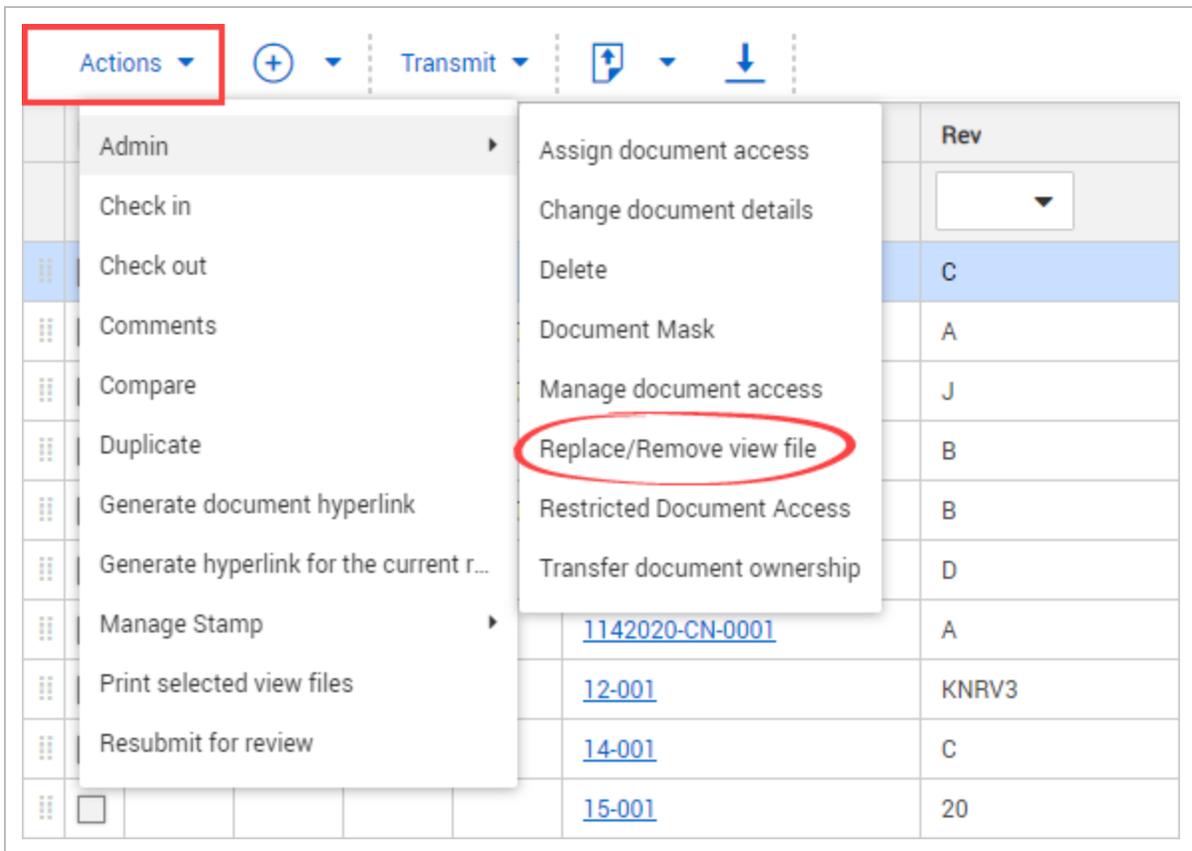
Apply first comment to all remaining actionable items

Document No.	Rev	Sts	Current file	Remove action	Redline markups	New file
1-2182020-NP...	C	IFI	10. Revision B.png	Replace ▼	Copy Redlines ▼	 Add files

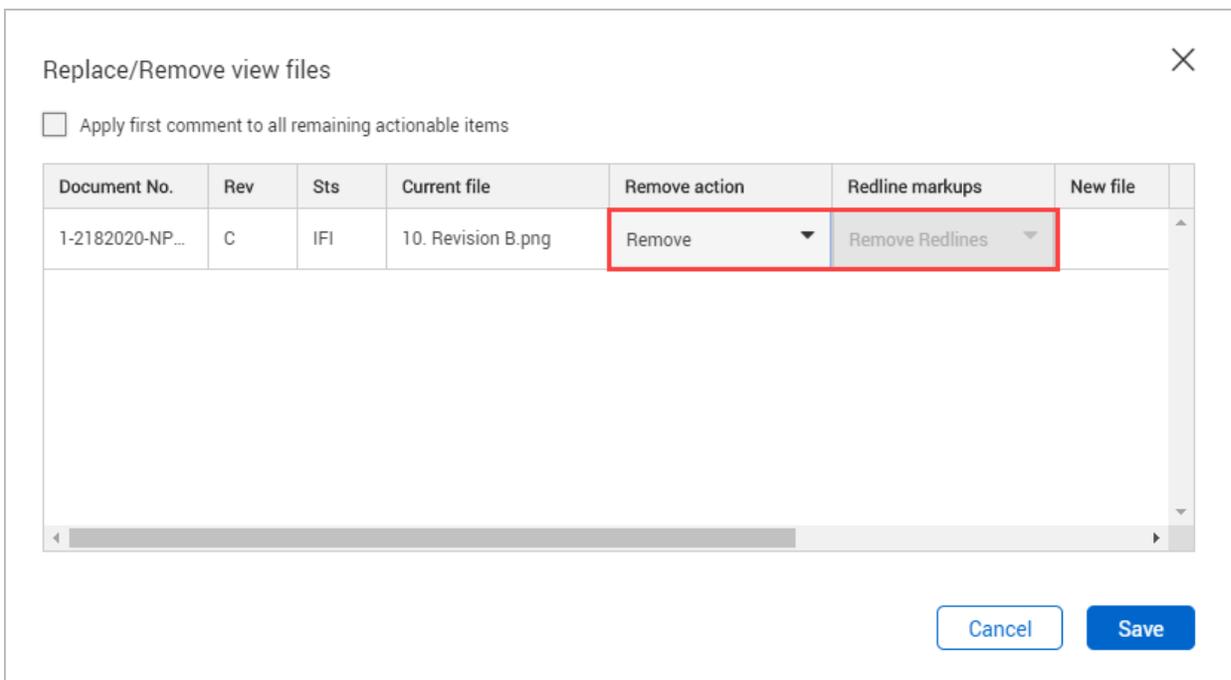
7. Click **Save**.

3.6.2 To remove a view file:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Replace/Remove view file**.



4. Select **Remove**. By default, Redline markups will be set to **Remove Redlines**.



5. Click **Save**.

NOTE

View files can only be replaced for documents with the following statuses:

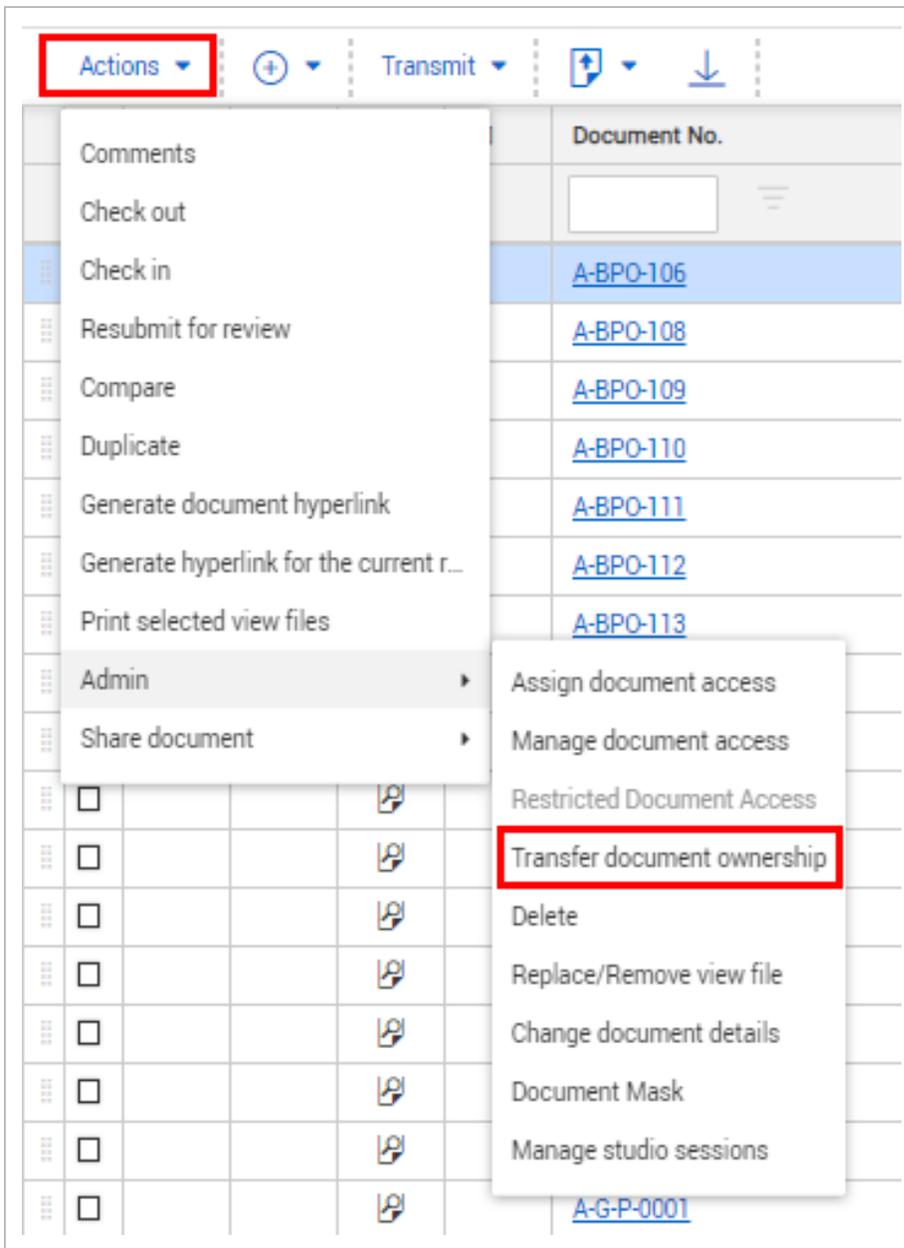
- Unrestrained.
- Restrained where the workflow has not been activated.
- Restrained documents awaiting release where the review type is single (not serial or parallel).

3.7 TRANSFERRING DOCUMENT OWNERSHIP

You might need to transfer document ownership to another company if they need to upload ongoing revisions. An example of this is when the early revisions of a document are uploaded on behalf of another company before a document controller is appointed.

3.7.1 To transfer document ownership:

1. Select the document.
2. Click **Actions**.
3. In the **Admin** menu, select **Transfer document ownership**.



4. Select the company you're transferring ownership to.
5. Select the contact for the company.
6. If you want to transfer all revisions of the document to the company, select the check box.

Transfer Document Ownership ✕

Select the User/Company to whom the ownership needs to be transferred to and click Save.

Company Contact

Select a company Select a contact

Note: Ownership will be transferred to the latest revision of the document.

Transfer ownership for all revisions of the selected documents.

Cancel Save

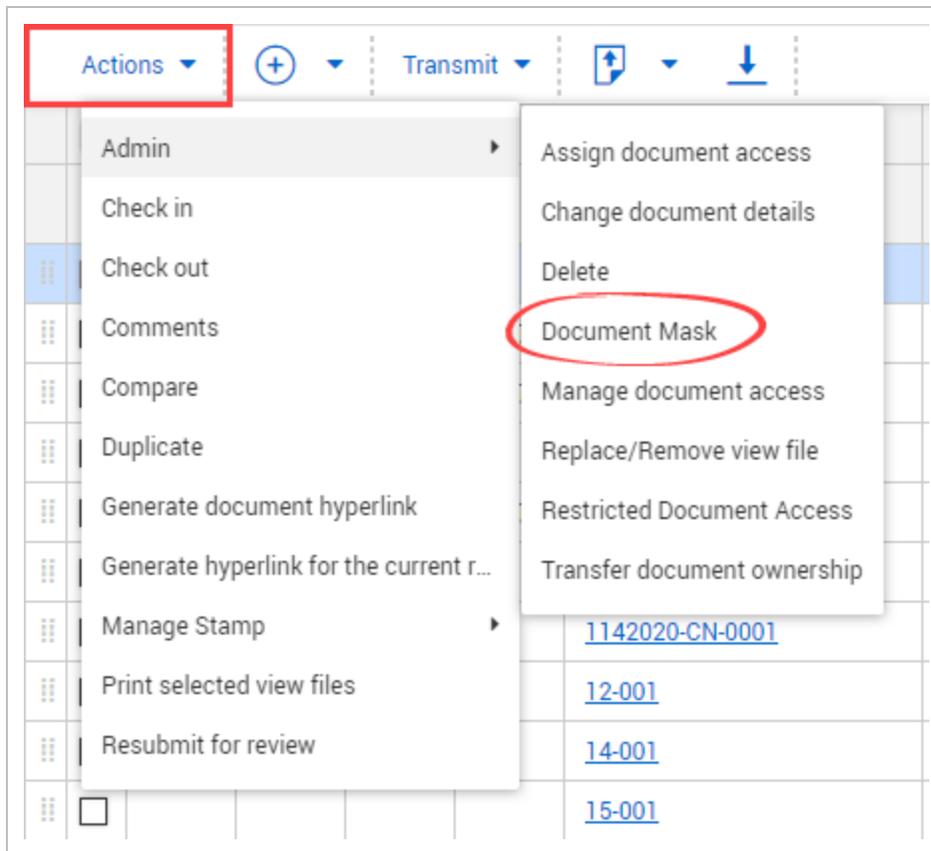
7. Click **Save**.

3.8 APPLYING DOCUMENT NUMBER MASKS

If a fixed document numbering format is to be used on a project, it is possible to define this format within InEight Document to ensure the format is adhered to for all documents uploaded to the project. Multiple fixed formats masks are also supported.

To define document number masks:

1. Select the document in the Register.
2. Click **Actions**.
3. In the **Admin** menu, select **Document Mask**.



4. Click the document mask buttons to create the document mask number. The document mask can consist of any of the following:
 - **N** = Alpha or number characters (0-9, A-Z).
 - **A** = Alpha characters only (A-Z).
 - **#** = Numeric characters only (0-9).
 - **X** = Any alpha or numeric characters.
 - **-** = Use the hyphen as a separator when required.

Document Mask ✕

Define one or more document masks to be used to validate the number of documents being uploaded to the Document Register.

Charaters defined by the document mask(s) ▾

Create a document number mask:

N A # X - Other

Clear +

Document masks created:

Document mask number

Document Number length should be same as the document mask

Cancel Save

5. Click the **plus icon** to add the document mask number.
6. Click **Save**.

NOTE

- To control the length of document numbers, select the **Document Number length should be the same as the document mask** check box.
- Use the **Other** button to define fixed characters as part of the document number. For example, to have the project number as the first 4 characters of all documents.
- A series of alternative masks can be used on a project. Documents uploaded must conform to one of the masks in use.
- Use the arrow buttons on the right of the screen to move a Document mask up or down. This determines the order of preference of the document masks.
- Click the **minus icon** to remove a mask from the system.
- When users are entering new documents into to the system, they will see the document mask icon in the document entry screen. They can use this icon to see the document mask(s) in use on the project.

3.9 LINKING DOCUMENTS

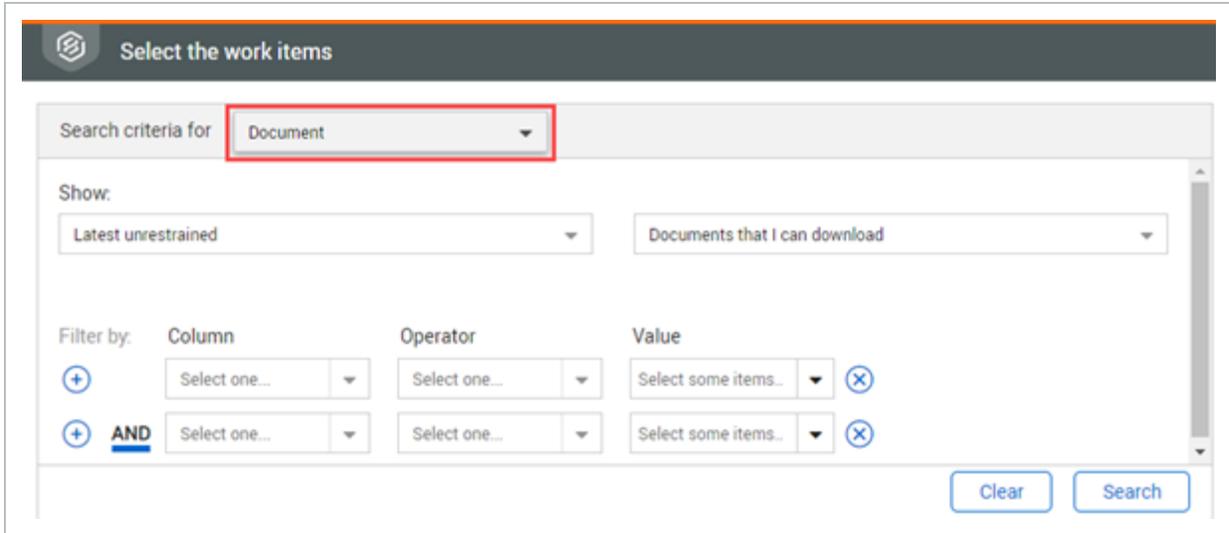
Create links between documents to keep them together.

3.9.1 To link a document to another:

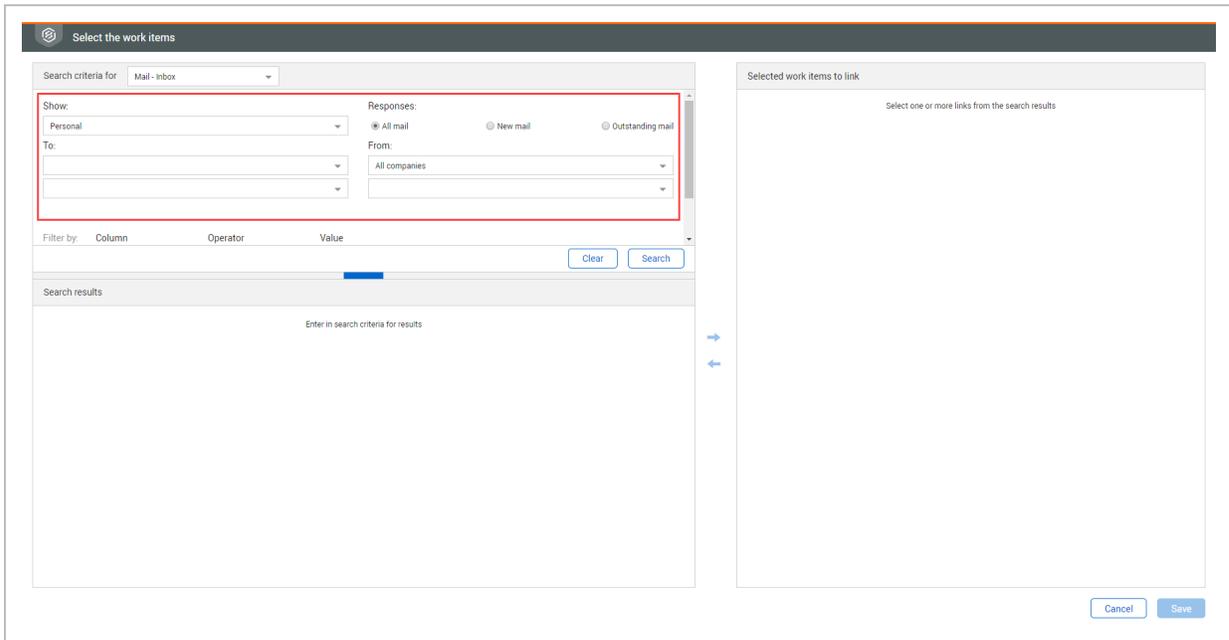
1. Open the document.
2. Click the **Links** tab.



3. Click the **plus icon** to open a new window.
4. Select the Module that you would like to link the item from.



5. Enter in the search criteria and click **Search**.



6. Select the document(s) and click the **arrow icon**.

3.0.1 Viewing User Access

View user access to a document from within the document.

3.0.1.1 To view user access:

1. Open the document.
2. Click the **User access** tab.

Name	Company	Formats	Last Access ...	Last Do...	Access ...	Details
ABC BC	Houston Contracting	PDF	21-01-20		Transmitt...	
ABC BC	Houston Contracting	DOC	21-01-20		Transmitt...	
ABC BC	Houston Contracting	OTHER	21-01-20		Transmitt...	
ABC BCD	QA Software Pty Ltd	PDF	28-11-19		Transmitt...	
ABC BCD	QA Software Pty Ltd	DOC	28-11-19		Transmitt...	
ABC BCD	QA Software Pty Ltd	OTHER	28-11-19		Transmitt...	
Adam Jones	Houston Contracting	PDF	17-01-20		Transmitt...	
Adam Jones	Houston Contracting	DOC	17-01-20		Transmitt...	
Adam Jones	Houston Contracting	OTHER	17-01-20		Transmitt...	
Adam Smith	KM1 Company	PDF	11-03-20		Packages	Pkg No: CN-GHA-311-PKG-001 Title: CN-GHA-311-PKG-001-title

Items: 337

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NOTE

- The format columns indicate what file formats each user has access to.
- The access from column indicates how that user was given access.

3.0.2 Viewing Document History

View document history from within the document.

3.0.2.2 To view document history:

1. Open the document.
2. Click the **History** tab.

Date	Event Type	Action By	Description	Notification Details
25-11-19 10:35 PM	Document Uploaded	shanik,a perer,a (titan)	More Information ⋮	
25-11-19 10:35 PM	View Document Details	shanik,a perer,a (titan)		
25-11-19 10:36 PM	Document Revised	shanik,a perer,a (titan)	More Information ⋮	
25-11-19 10:36 PM	View Document Details	shanik,a perer,a (titan)		
25-11-19 10:36 PM	View Document Details	shanik,a perer,a (titan)		
25-11-19 10:43 PM	Recipient Company Docum...	shanik,a perer,a (titan)	Access granted to Transmittal recipient company ...	
25-11-19 10:46 PM	Recipient Company Docum...	shanik,a perer,a (titan)	Access granted to Transmittal recipient company ...	
27-11-19 06:24 PM	Transmittal Sent	Greg Harrison (Houston ...	More Information ⋮	
27-11-19 06:24 PM	Transmittal Document Acce...	Greg Harrison (Houston ...	Access granted to Transmittal recipients ⋮	
27-11-19 06:24 PM	Recipient Company Docum...	Greg Harrison (Houston ...	Access granted to Transmittal recipient company ...	

NOTE

- Use the search box to filter document history.
- Print or export the document history by clicking the **print** or **export** icons in the top left corner of the screen.

3.0.3 Viewing Document Review Status

View document review status from within the document.

3.0.3.3 To view document review status:

1. Open the document.
2. Click the **Review Status** tab.

Use the Documents tab to see linked items. Click the link to go directly to the linked item. Values in the Link type field indicate whether a link was added manually or from the file viewer annotation feature.

Use the Submittal Deliverable tab to see the submittal numbers and deliverables that the document is linked to. You can click on the submittal number to go directly to the submittal or the deliverable number to directly to the deliverable.

CHAPTER 4 – APPLYING DOCUMENT ADMINISTRATION SETTINGS

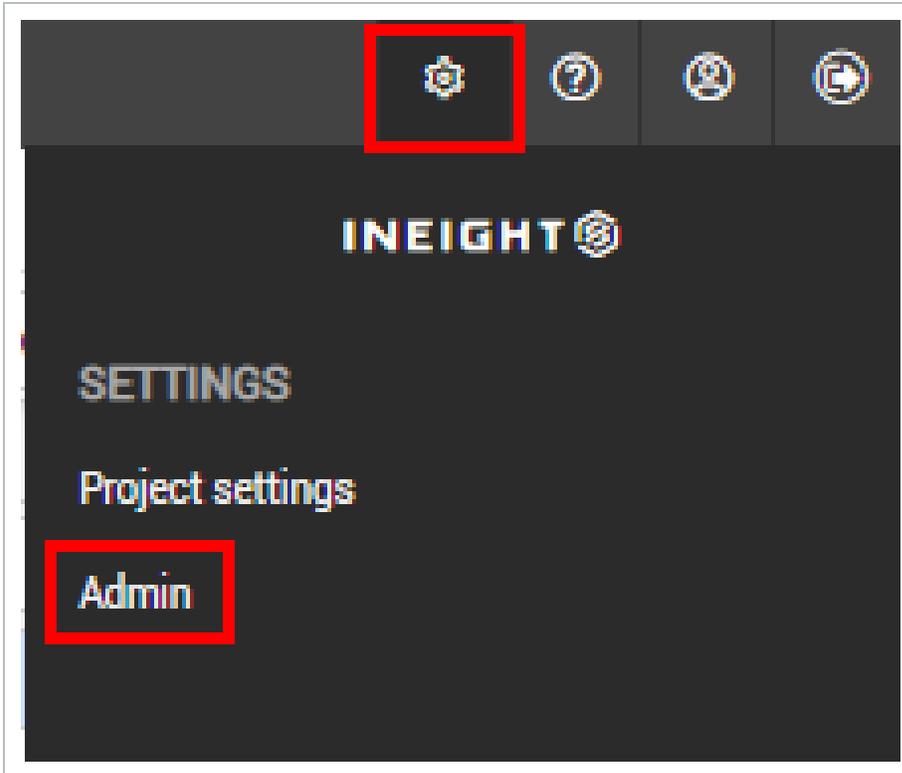
You can view apply different administration settings to documents in the Documents Register. See the links below for information on applying document administration settings.

4.1 DEFINING DOCUMENT UPLOAD RULES

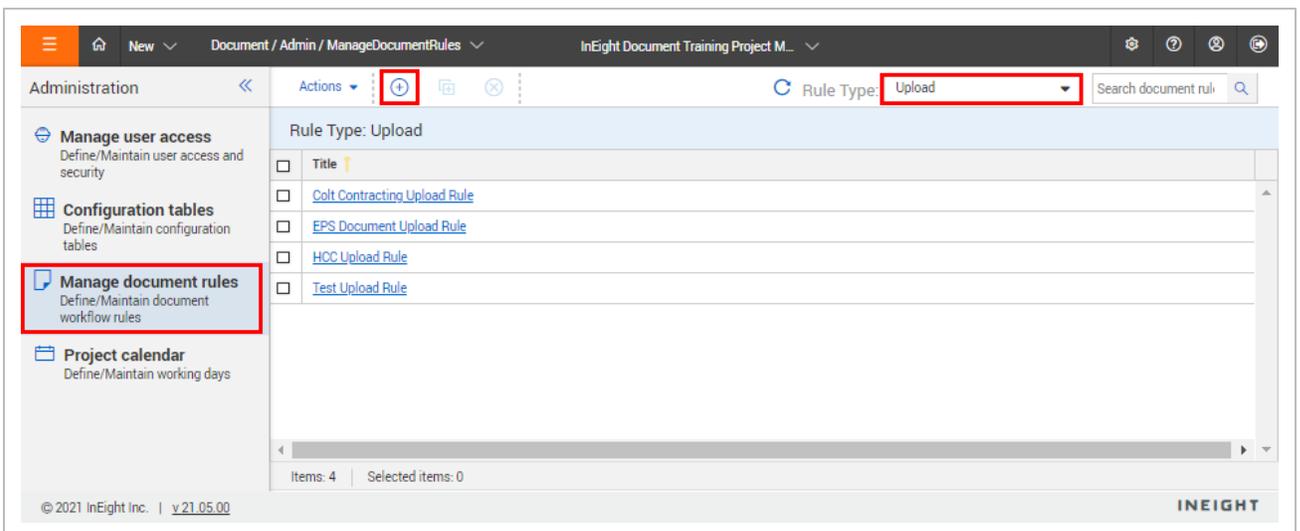
InEight Document controls who can upload documents to the system by a flexible system of document rules. Upload rules are defined in terms of key document attributes and companies are allocated to one or more rule sets. This means they can only upload documents that conform to the rule set they have been assigned to.

4.1.1 To define document upload rules:

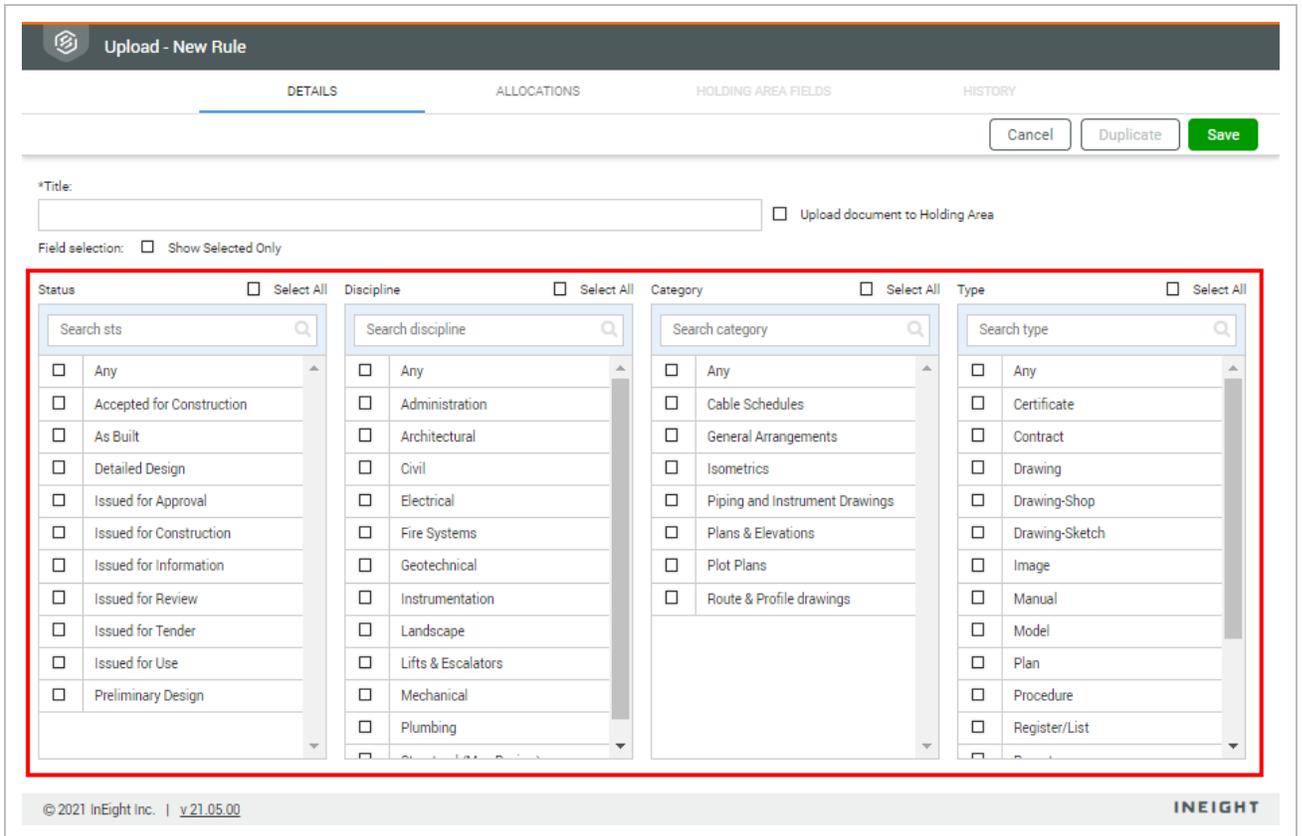
1. Click the **cogwheel icon** and select **Admin**.



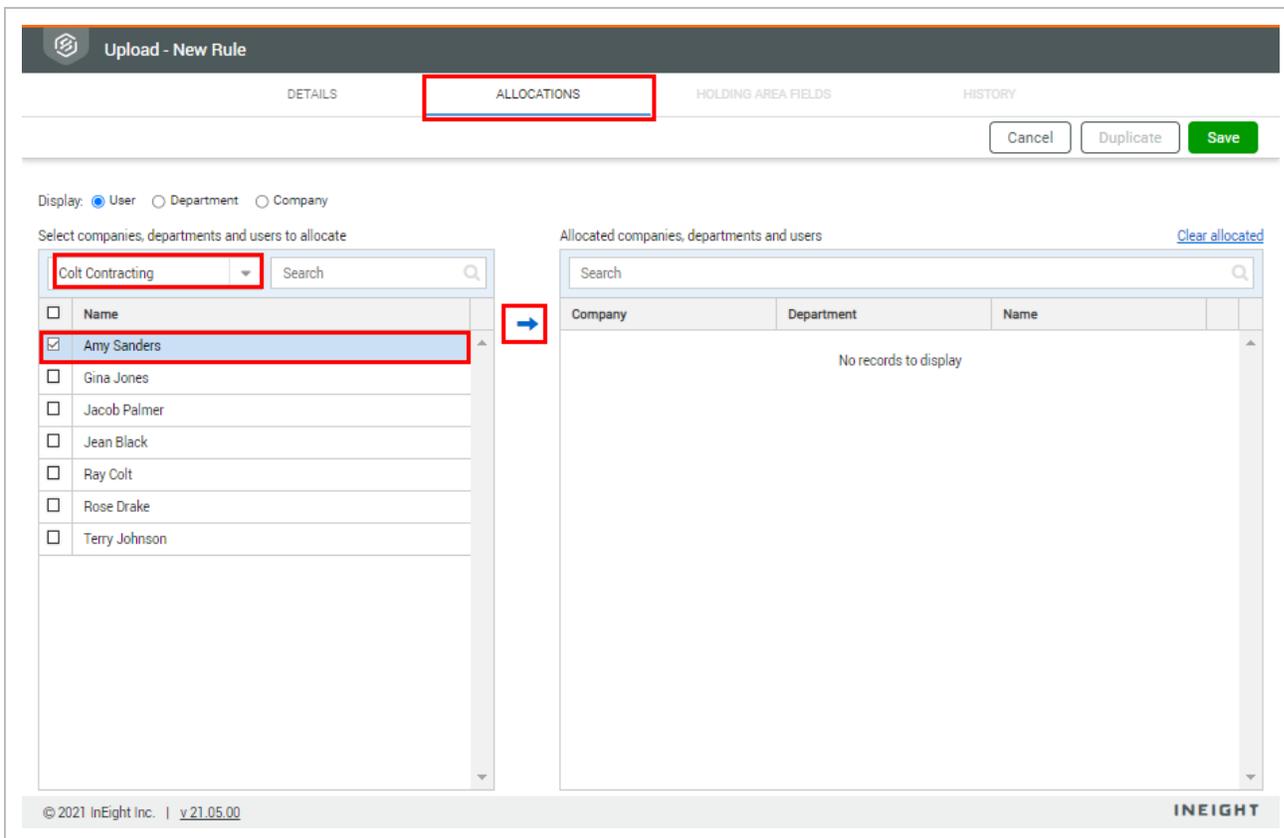
2. Select **Manage document rules**.
3. In the **Rule Type** drop-down menu, select **Upload**.



4. Click the **plus icon**.
5. Enter in a title for the upload rule.
6. Select the **Status, Discipline, Category** and **Type** for the new upload rule.



7. In the **Allocations** tab, select the company.
8. Select the contact and click the **arrow icon**.



9. Click **Save**.

NOTE

- In addition to belonging to a company assigned to one or more upload rules, users who need to upload documents must be assigned full access to the Document Register.
- While more than one company can be authorized to upload documents belonging to an upload rule set, once a document has been uploaded usually only the company who uploaded it can upload future revisions.

4.2 DEFINING DOCUMENT DISTRIBUTION RULES

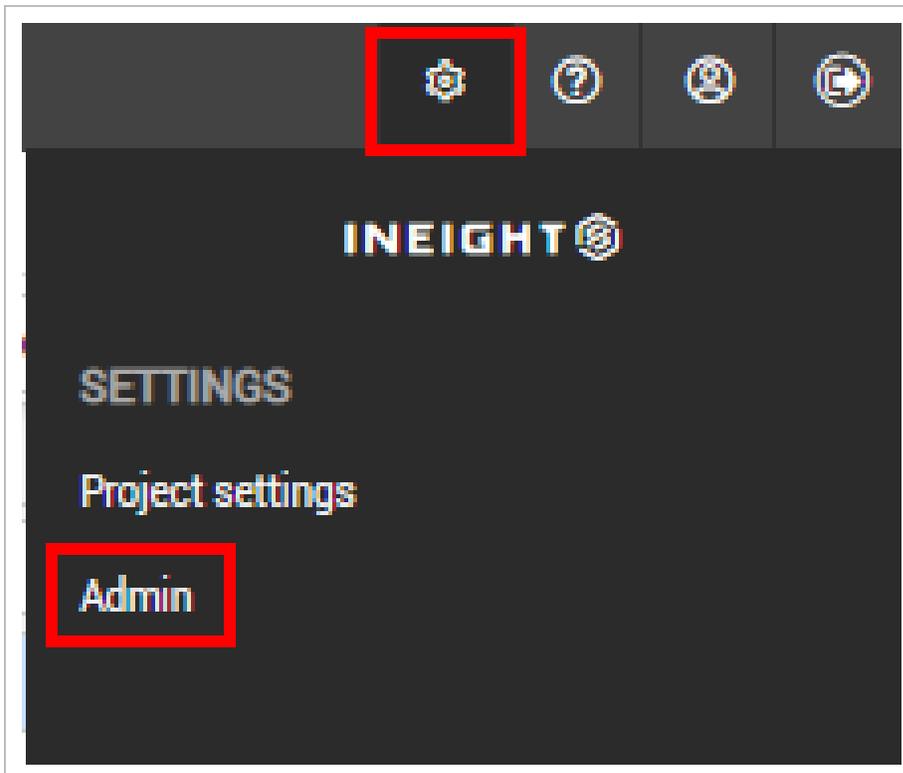
InEight Document can automate the distribution of documents uploaded to the system via rule-based distribution rules which control:

1. The **default distribution** for unrestrained documents.
2. The format(s) of the documents each person on the distribution can download.

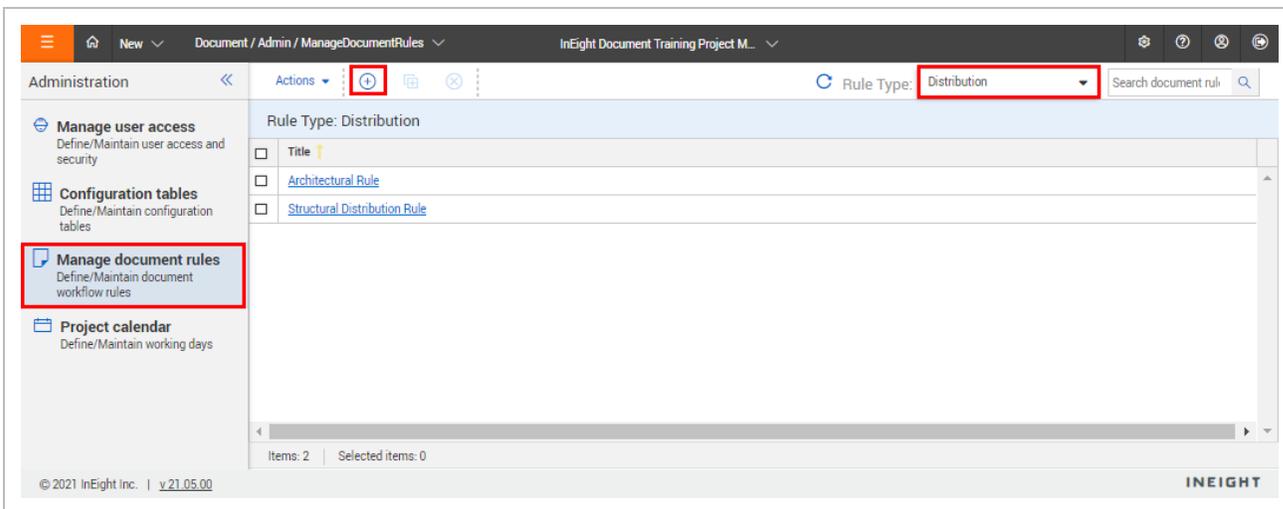
3. A user included in a **distribution rule** set will automatically be notified when documents meeting the rule-based criteria of the group are released in InEight Document.
4. Distribution rules are defined on a per attribute basis.

4.2.1 To define document distribution rules:

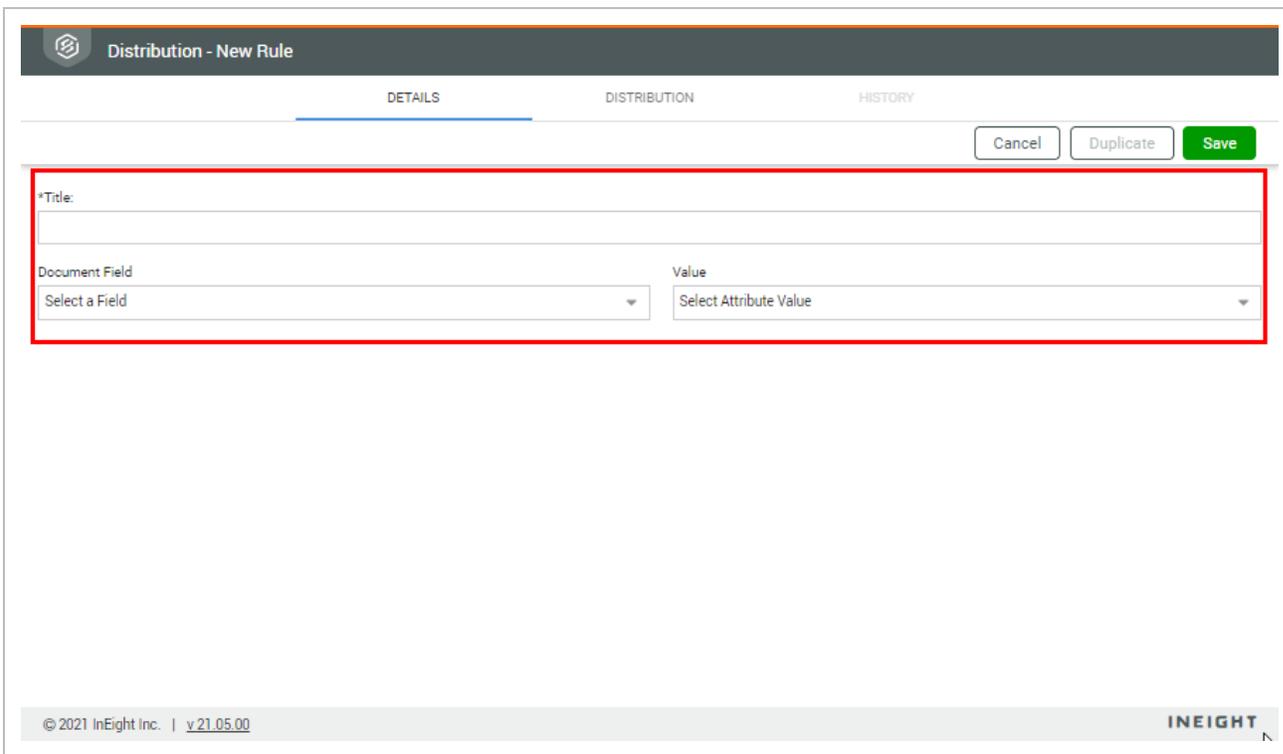
1. Click the **cogwheel icon** and select **Admin**.



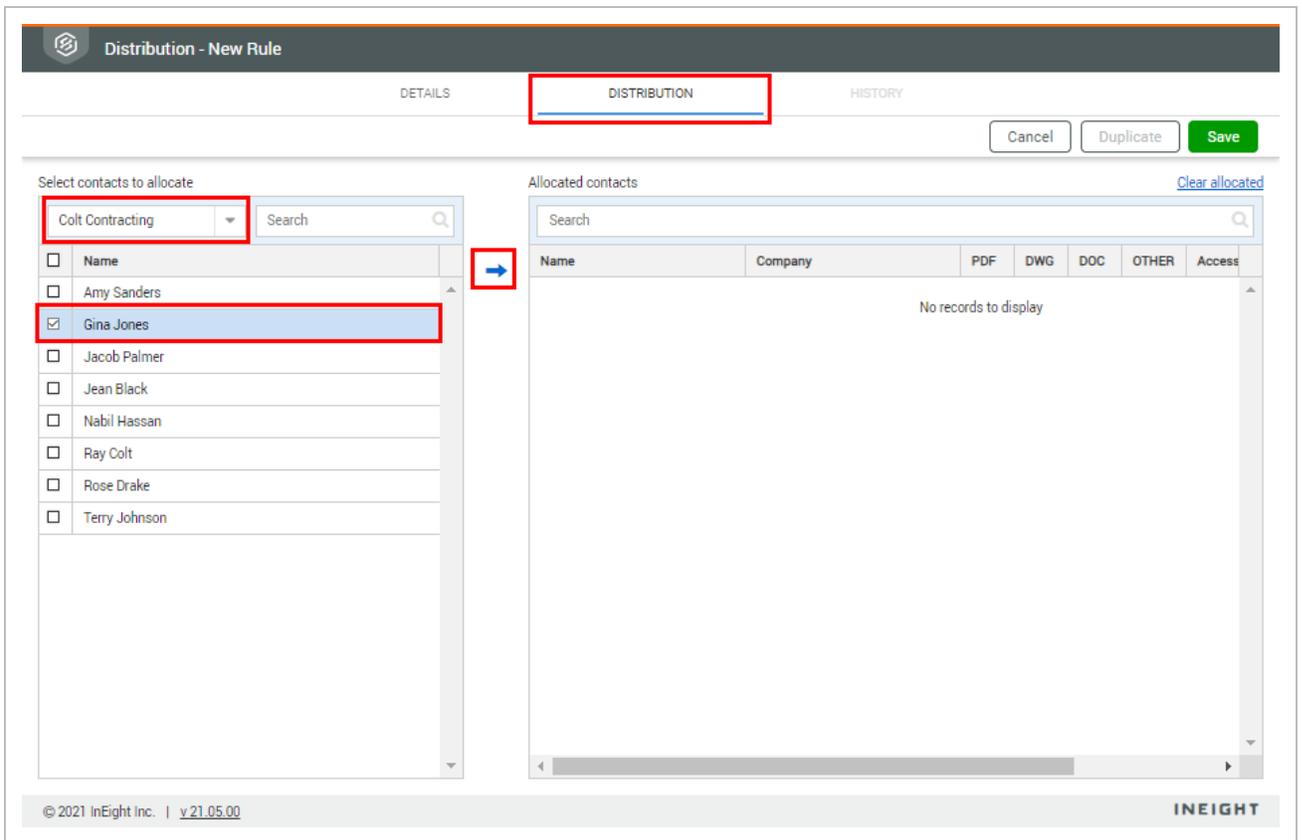
2. Select **Manage document rules**.
3. In the **Rule Type** drop-down menu, select **Distribution**.



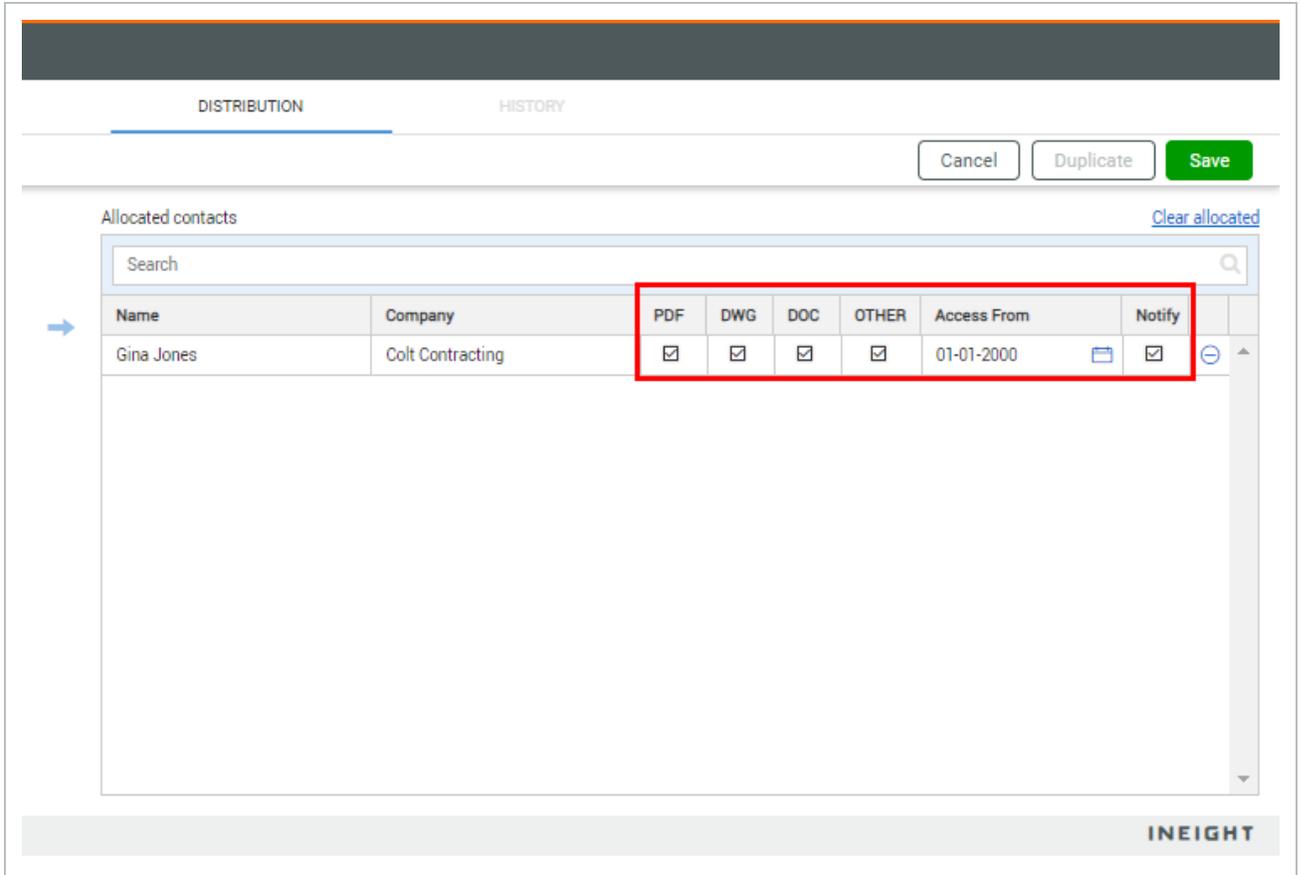
- 4. Click the **plus icon**.
- 5. Enter in the title for the distribution and select a value from the drop-down menu.



- 6. In the **Distribution** tab, select the company.
- 7. Select the contact and click the **arrow icon**.



- 8. Select the formats the contact has access to.
- 9. Select notify to send notifications to the contact for documents.



10. Click **Save**.

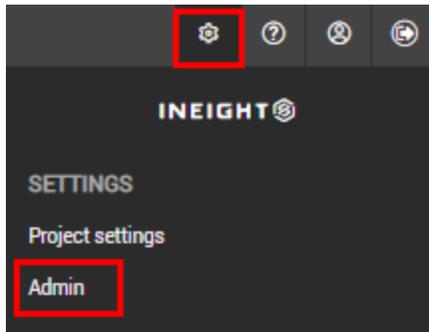
NOTE

- If a person removed notifications from their user preferences and **Notify** is selected, they will still receive a notification.
- The distribution rules a user belongs to can also be reviewed and maintained via the **Distribution Matrix** tab in the contact details screen.
- When you add a person to a distribution rule and there is a conflicting restricted document access rule, a warning message is shown with a link to the rule with the conflict.
- For customers who would prefer that all documents are distributed via transmittals, the option to use distribution rules can be removed from the system completely. Contact InEight for more information.

4.3 ACCESS USER SECURITY SETTINGS

4.3.1 To access group security settings:

1. Click the **Settings** icon, and then select **Admin**.



2. Select **Manage user access**.
3. Select a security group, and then select **Security** from the **Access Type** drop-down menu.
4. Select **Documents** from the **Module** drop-down menu. The Document security group settings are listed.
5. Select the check box in the Allow column for each feature you want to allow for the security group.

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CHAPTER 5 – DOCUMENT REVIEW AND APPROVAL

See the links below for information on how use the Review and Approval modules.

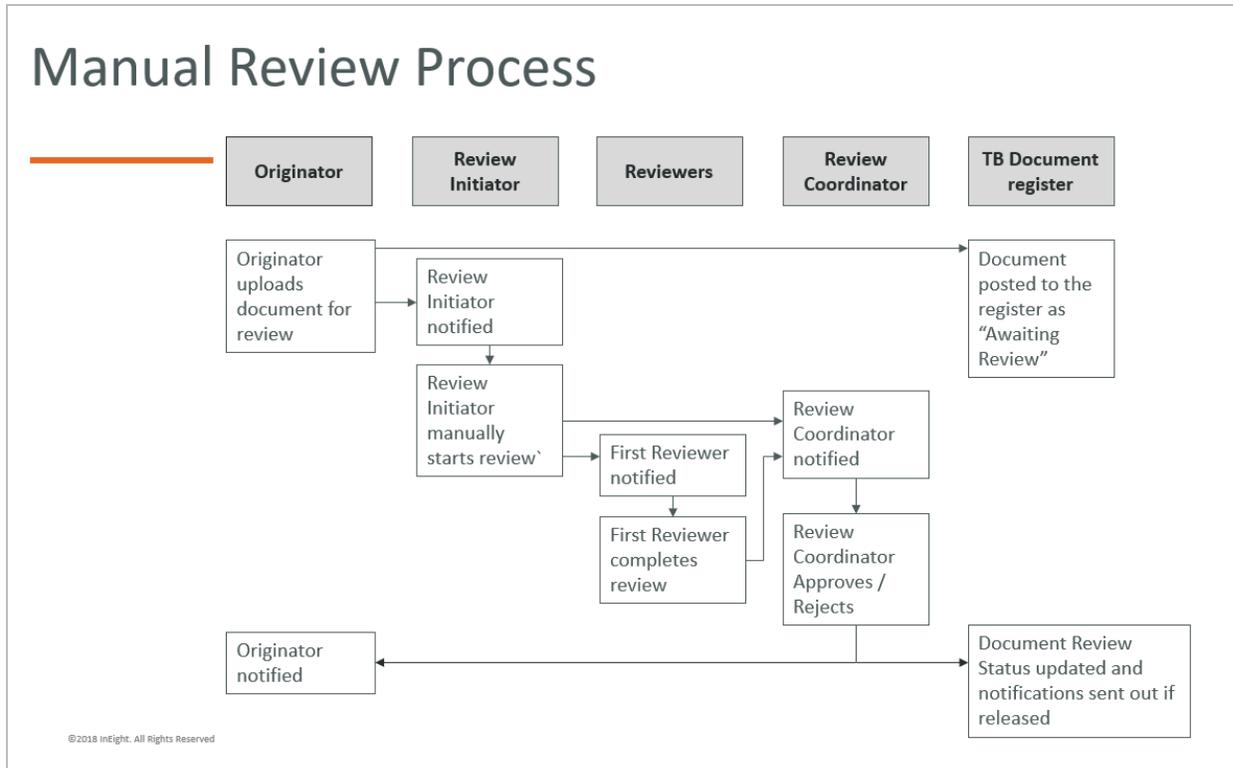
5.1 OVERVIEW

There are 8 steps in the Document Review (manual workflow) process once a [restrained document](#)¹ 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.

¹To be passed through a workflow.

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).

The screenshot shows the 'New document' form with the following details:

- Document No.:** QAS-PLAN-L1-004
- Title:** Site Plan
- Revision:** A - Rev A
- Status:** IFR - Issued for Review (highlighted in red)
- Discipline:** ARC - Architectural
- Type:** DRG - Drawing
- Category:** Select one

The 'Files' section on the left shows a table with one entry:

File name	Extension	Size
Site Plan.pdf	pdf	660 KB

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.

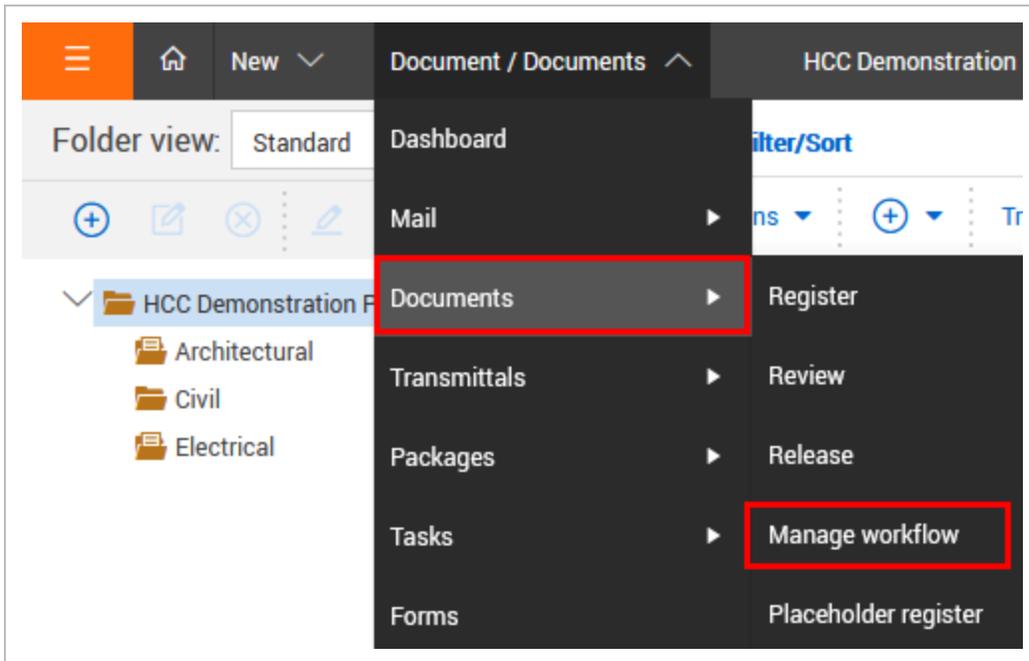
5.3 ACTIVATING A DEFAULT WORKFLOW

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

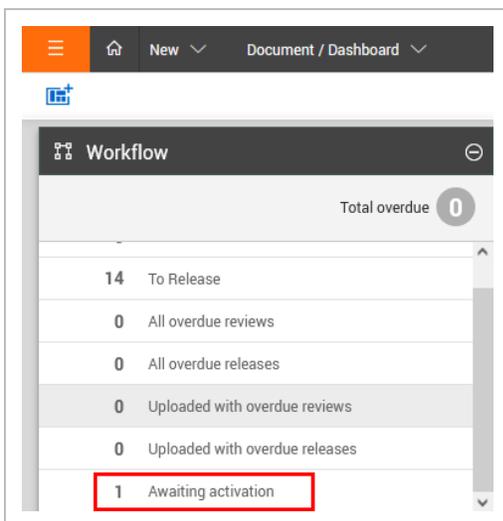
The review initiator can activate the workflow on a per document basis or for a batch of documents.

To activate the default rules based review team:

1. From the **Module Menu**, hover over **Documents** and select **Manage workflow**.



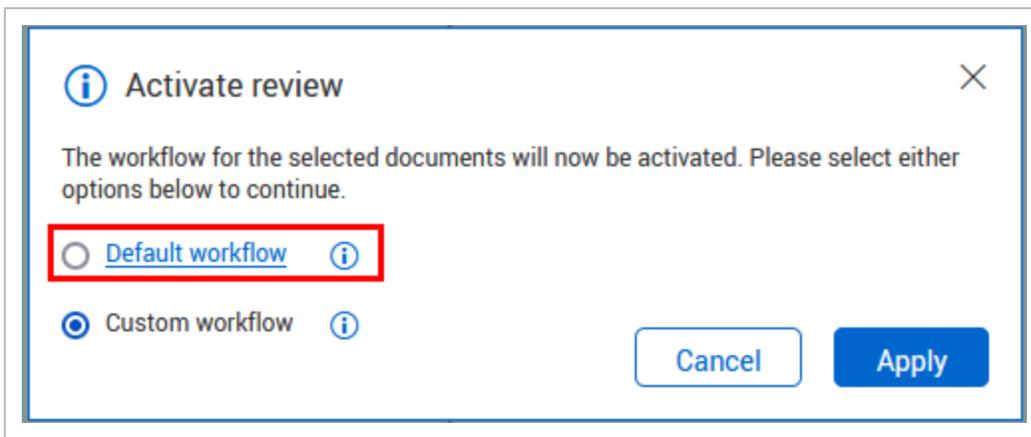
2. Alternatively, from the **Dashboard Workflow** widget, select **Awaiting activation**.



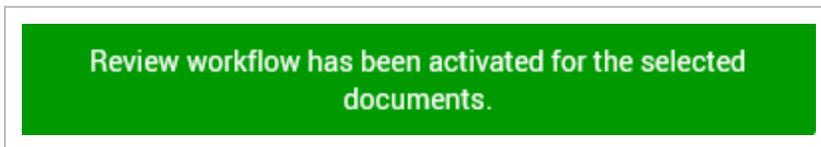
3. At the **Manage Document Workflow** screen, by default “Review not started” is listed. Select the document(s) to activate the review process.

Redlines	Document No.	Rev	Sts	Document title	Discipline	Category	Workflow members
	QAS-PLAN-L1-0001	A	IFR	Site Plan Level 1	ARC		
	QAS-PLAN-L2-002	A	IFR	Site Plan Level 2	ARC		
	QAS-PLAN-L3-003	A	IFR	Site Plan Level 3	ARC		
	QAS-PLAN-L4-004	A	IFR	Site Plan Level 4	ARC		

- 4. Click the **Activate** button.
- 5. 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.



NOTE

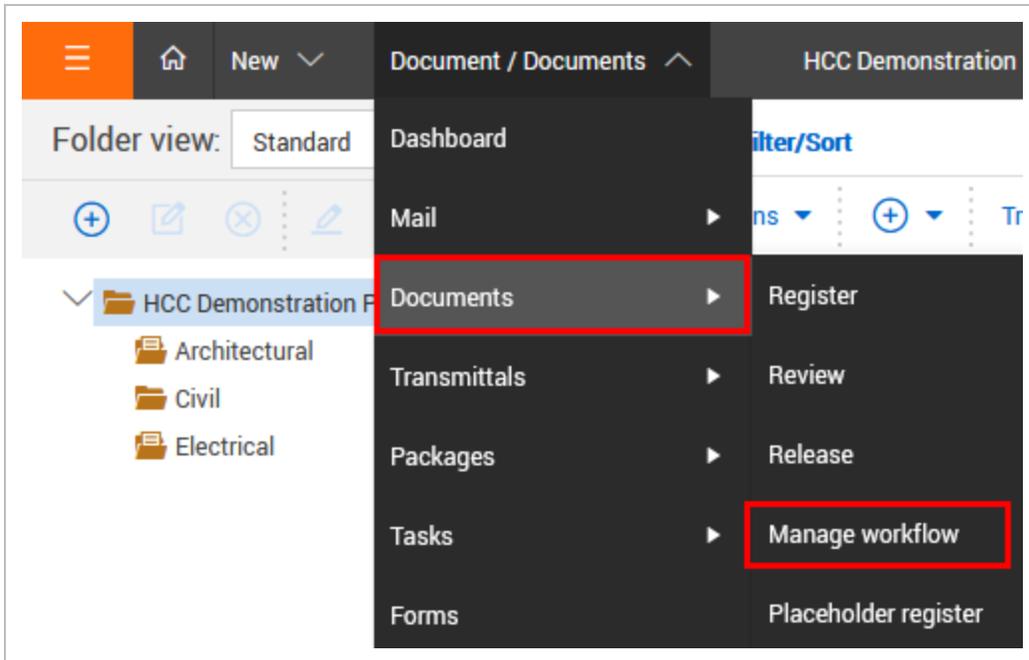
- You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending and descending order.
- 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.
- When you activate workflow for documents that have the same review team, Document automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Review or Release register for you to use to filter the register to quickly find all documents in the workflow.

5.4 ACTIVATING A CUSTOM WORKFLOW

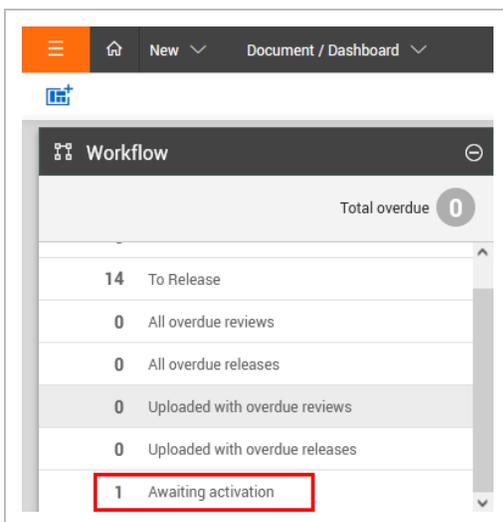
The review initiator has a choice of using the default rules based review team or using a custom workflow that can be defined from scratch or based on a predefined free-form review team.

5.4 Step by Step 1 — Activate a custom workflow

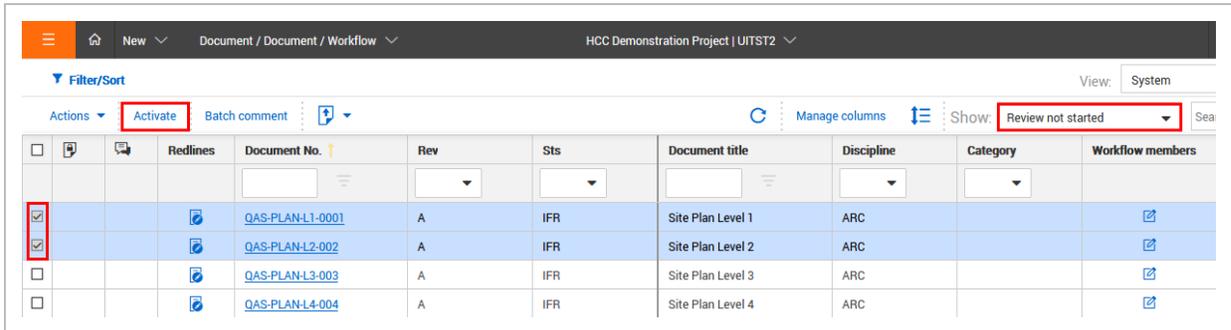
1. From the **Module Menu**, hover over **Documents** and select **Manage workflow**.



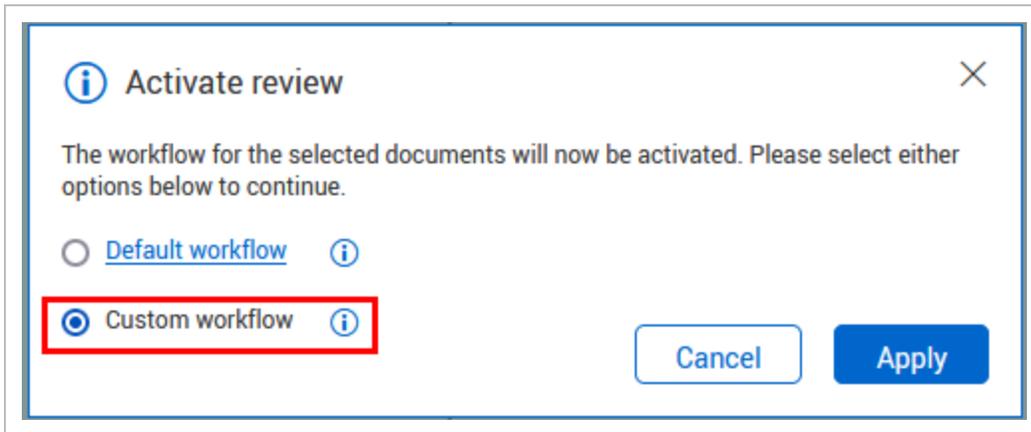
2. Alternatively, from the Dashboard Workflow widget, select **Awaiting activation**.



- At the **Manage Document Workflow** screen, by default “Review not started’ is listed. Select the documents to activate the review process.



- Click the **Activate** button.
- At the next window select **Custom Workflow** and click **Apply**.



- 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.

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

Activate workflow

* Document review coordinator: User Role

* Document review coordinator company: * Document review coordinator contact: Total review duration in (inputed) days:

* Display: All contacts Roles Free form review teams

Select contacts to allocate

Search all contacts...

Name
<input type="checkbox"/> Anna Smith
<input type="checkbox"/> Steve Works

Allocated contacts, roles and free form review teams

Search allocated...

Name	Company	Due date	Sequence	Duration (Days)	Optional	Either
Madeline White	Brookman Co.		1	1	<input type="checkbox"/>	<input type="checkbox"/>
Andrew Miller	Brookman Co.		2	1	<input type="checkbox"/>	<input type="checkbox"/>
Steve Works	Wells Engineering		2	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

8. 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.

Allocated contacts, roles and free form review teams

Search allocated...

Name	Company	Due date	Sequence	Duration (Days)	Optional	Either
Madeline White	Brookman Co.		1	1	<input type="checkbox"/>	<input type="checkbox"/>
Andrew Miller	Brookman Co.		2	1	<input type="checkbox"/>	<input type="checkbox"/>
Steve Works	Wells Engineering		2	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

11. Enter the **Total** Review Durations for the review.

12. Click **Save** to activate the workflow and click **OK** at the confirmation message.

NOTE

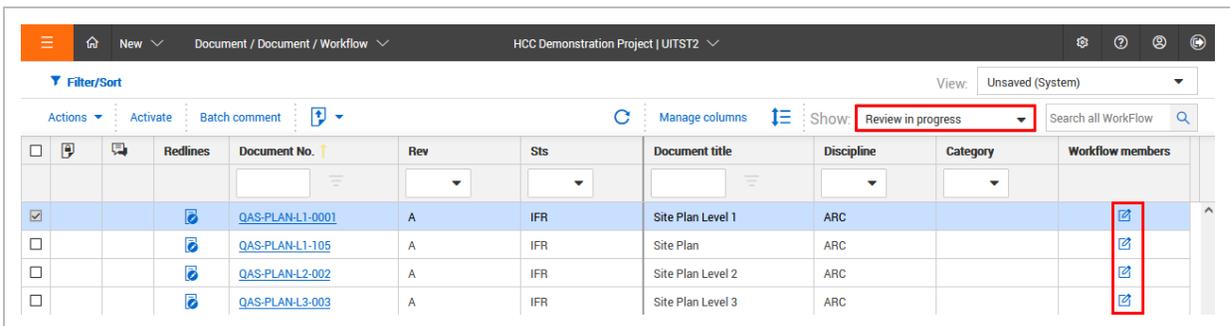
- You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending and descending order.
- 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.
- When you activate workflow for documents that have the same review team, Document automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Review or Release register for you to use to filter the register to quickly find all documents in the workflow.

5.5 MODIFY AN IN-PROGRESS WORKFLOW

A workflow can be modified once it has been activated.

To modify the in-progress workflow:

- From the **Module Menu**, hover over **Documents** and select **Manage workflow**.
- Alternatively, from the Dashboard Workflow widget, select **Awaiting activation**.
- At the **Manage Document Workflow** screen, change the option to view “Reviews in progress”.
- Click  icon against the document to modify the workflow.

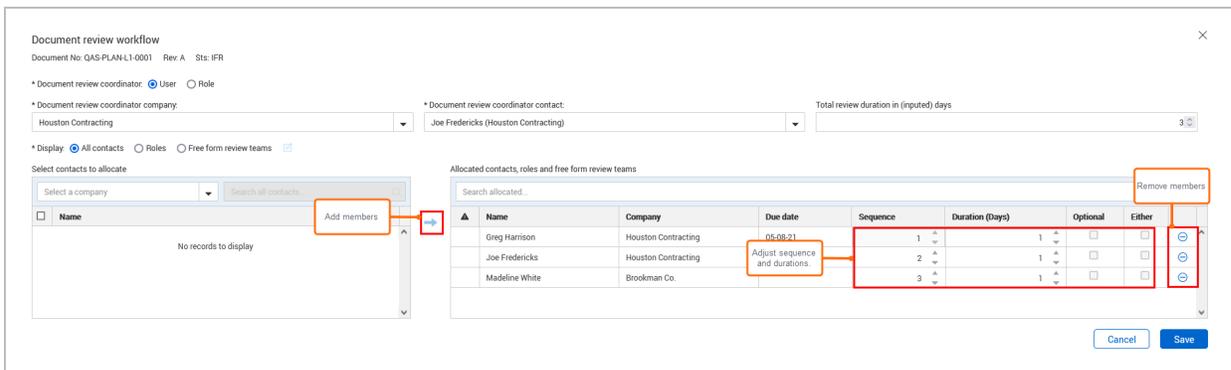


The screenshot shows the 'Manage Document Workflow' interface. At the top, there's a navigation bar with 'New', 'Document / Document / Workflow', and 'HCC Demonstration Project | UITST2'. Below that, there's a 'Filter/Sort' section with a 'Show:' dropdown menu set to 'Review in progress'. The main area contains a table with columns: Redlines, Document No., Rev, Sts, Document title, Discipline, Category, and Workflow members. The table lists four documents: QAS-PLAN-L1-0001 (Site Plan Level 1), QAS-PLAN-L1-105 (Site Plan), QAS-PLAN-L2-002 (Site Plan Level 2), and QAS-PLAN-L3-003 (Site Plan Level 3). Each row has an edit icon in the 'Workflow members' column, which is highlighted with a red box in the original image.

Redlines	Document No.	Rev	Sts	Document title	Discipline	Category	Workflow members
	QAS-PLAN-L1-0001	A	IFR	Site Plan Level 1	ARC		
	QAS-PLAN-L1-105	A	IFR	Site Plan	ARC		
	QAS-PLAN-L2-002	A	IFR	Site Plan Level 2	ARC		
	QAS-PLAN-L3-003	A	IFR	Site Plan Level 3	ARC		

- 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

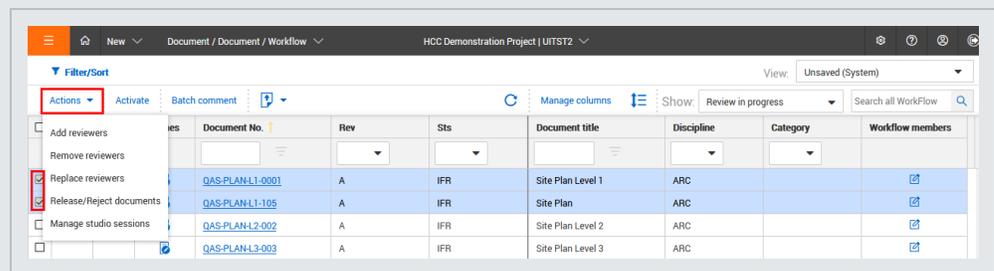
to commence their review cannot be removed or adjusted.



6. Click **Save**.

NOTE

- To Add / Remove/ or Replace reviewers in bulk, from within the Manage Document Workflow screen, select the relevant workflows, then **Actions** 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.

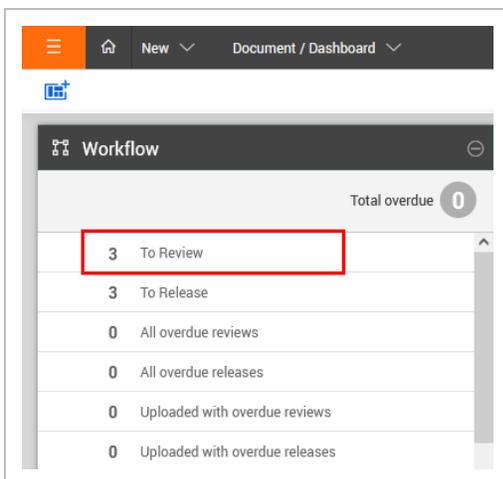
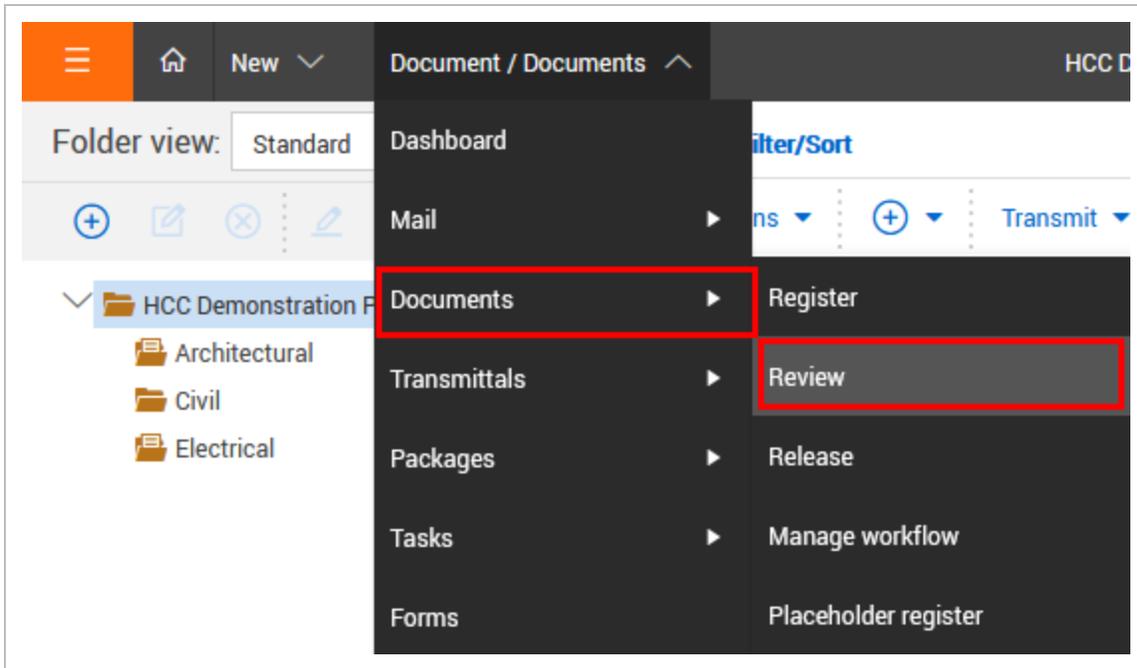
Each reviewer must complete their Review using the **DocumentReview** screen to record their review comments into the system. The Review screen can be used to:

- Redline the drawings on-line.
- Make text comments against the document on-line.
- Attach an external file, for example, an MS Word document of comments.
- Attach a scanned copy of a hardcopy mark-up.

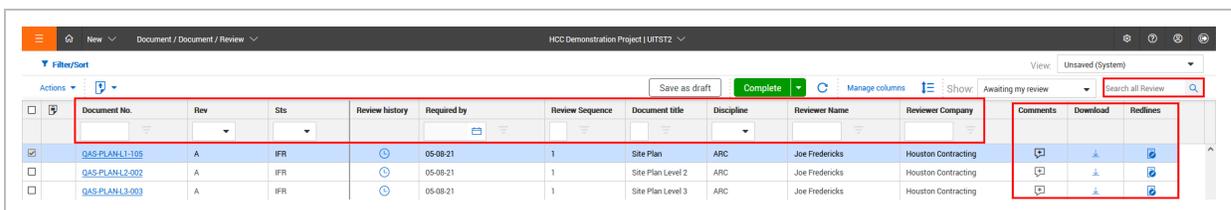
The Review screen is also used to indicate that a reviewer has completed their review and the date. An email notification is then sent to the next reviewer in sequence and a notification is sent to the review coordinator informing the reviewer has finished.

Using the Document Review screen:

1. From the **Module Menu**, hover over **Documents** and select **Review**. Alternatively use the hyperlink in the **Workflow** Widget on the Dashboard .

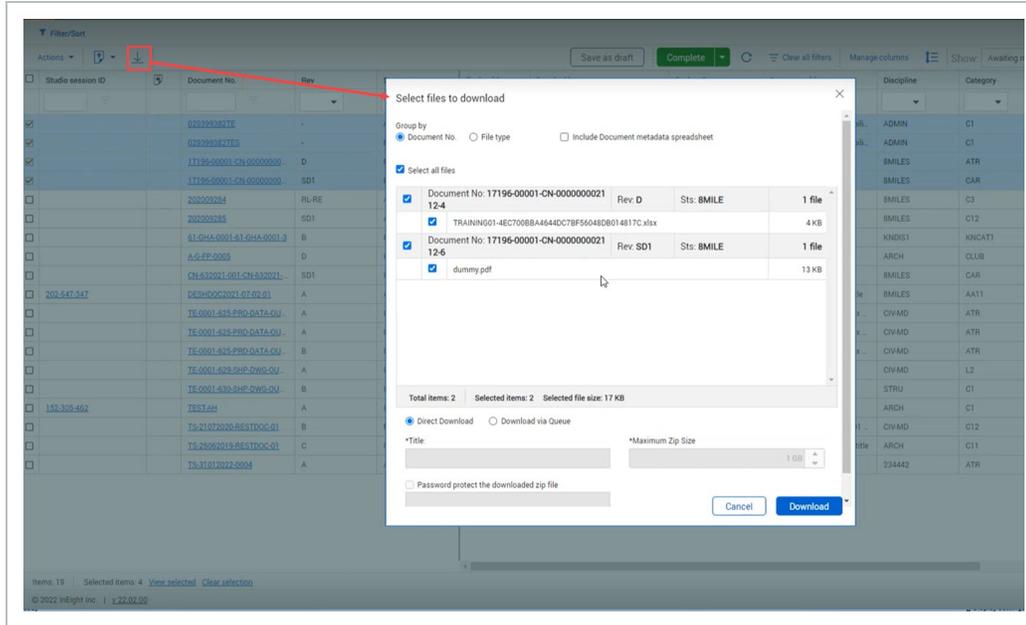


2. If there are many documents awaiting review, use the **Search box or filters**.

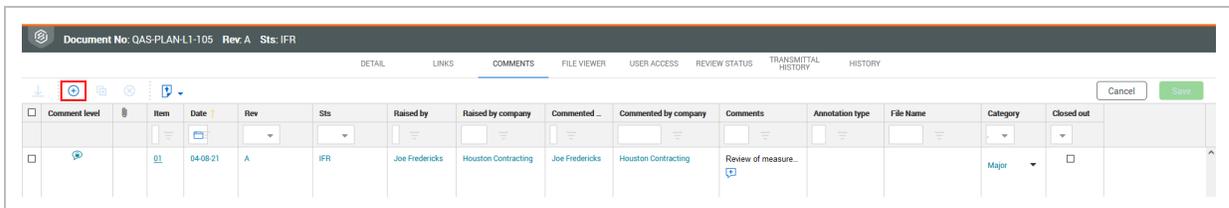


3. Download one or more documents to a PC for either printing or offline review. If the hard copy is marked up, scan and upload as an attachment.

- To download a single document, click the **Download** icon to download the document
- To download multiple documents, click the **Download** icon in the toolbar, and then select the files from the Select files to download dialog box.



4. Click the **Redlines** icon to open the document in the online viewer (if activated on your project). The document can be marked up (red-line) and text comments can be added.
5. Click the **Comments** icon to add electronic comments to the documents.
6. In the new window, click the **plus** button to add a comment.



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

✖
New Comment

*** Comments**

[Plain Text](#)

Arial 13 px A B I U ☰ ☰ ☰ ☰ ☰ ☰

*** Category:**

Major

Raised by company

Select one...

Raised by

Select one...

Attach files:

📎 Attach files ↓ Download all ↓ Download selected

There are no attachments uploaded.

Items: 0

Cancel
Save

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- Select a **Category** for your comment (optional).
- A comment raised on behalf of a 3rd party is specified in the **Raised by** value.
- Click **Save** when finished to return to the Comments window and close the window to return to the Document list in the Review screen. The comment icon changes to a red icon to indicate that there is an outstanding comment against the document.

Document No.	Rev	Sts	Review history	Required by	Review Sequence	Document title	Discipline	Reviewer Name	Reviewer Company	Comments	Download	Redlines
QAS-PLAN1.1-005	A	IFR	🕒	05-08-21	1	Site Plan	ARC	Joe Fredericks	Houston Contracting	📄	↓	🔍
QAS-PLAN1.2-002	A	IFR	🕒	05-08-21	1	Site Plan Level 2	ARC	Joe Fredericks	Houston Contracting	📄	↓	🔍
QAS-PLAN1.3-003	A	IFR	🕒	05-08-21	1	Site Plan Level 3	ARC	Joe Fredericks	Houston Contracting	📄	↓	🔍

7. Once your reviews are complete, from the Document Review screen, select the Document/s and click **Complete**.

Document No.	Rev	Sts	Review history	Required by	Review Sequence	Document title	Discipline	Reviewer Name	Reviewer Company	Comments	Download	Redlines
<input checked="" type="checkbox"/> GAS-PLAN.1-105	A	IFR		05-08-21	1	Site Plan	ARC	Joe Fredericks	Houston Contracting			
<input type="checkbox"/> GAS-PLAN.2-002	A	IFR		05-08-21	1	Site Plan Level 2	ARC	Joe Fredericks	Houston Contracting			
<input type="checkbox"/> GAS-PLAN.3-003	A	IFR		05-08-21	1	Site Plan Level 3	ARC	Joe Fredericks	Houston Contracting			

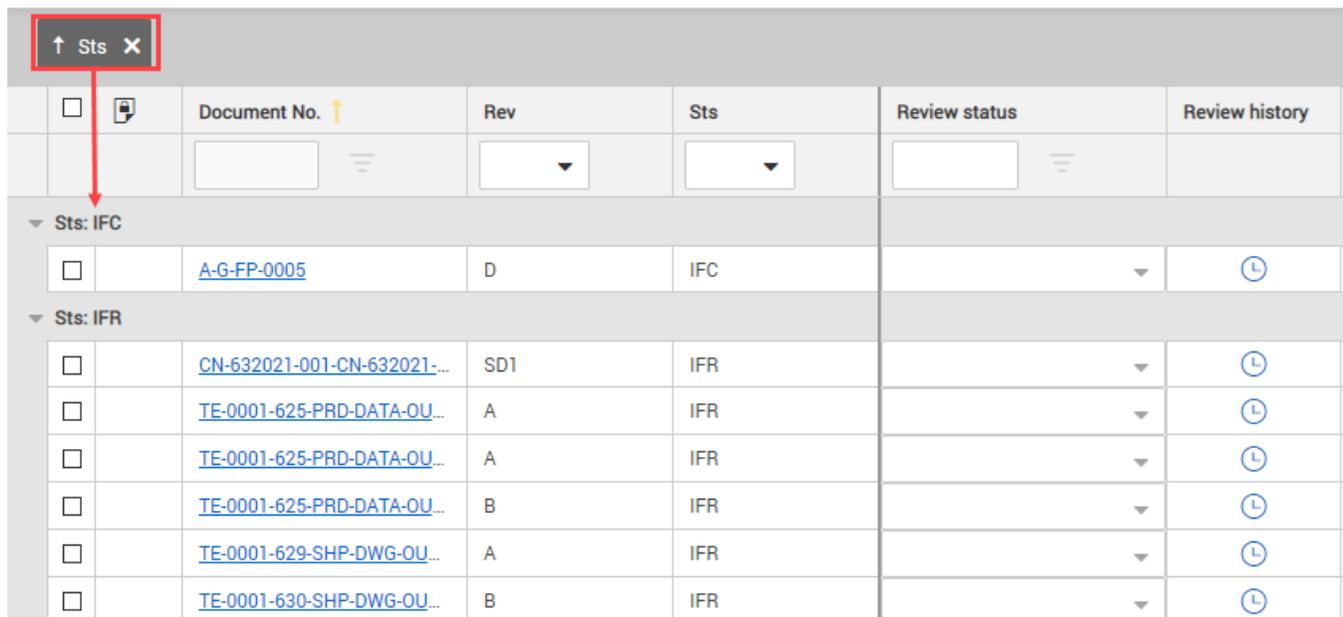
NOTE

- 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).
- InEight Document sends out automatic reminders via email if reviews are not completed by each reviewer within the pre-determined durations.
- 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 **Manage Columns**.
- InEight Document has been fully integrated with Bluebeam Studio to enable document reviews via Bluebeam rather than the Online Viewer tool. Contact InEight for details.

5.6.1 Group items in the Document review register

You can group entries in the Document review register by available register columns to help you quickly locate documents.

The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Sts column to the bar, the documents are grouped by status. In the image below, the documents are grouped by status in ascending order. The documents with no status would come first, followed those with IFC status and then those with IFR status.



<input type="checkbox"/>		Document No. ↑	Rev	Sts	Review status	Review history
↑ Sts ×						
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
▼ Sts: IFC						
<input type="checkbox"/>		A-G-FP-0005	D	IFC	<input type="text"/>	
▼ Sts: IFR						
<input type="checkbox"/>		CN-632021-001-CN-632021-...	SD1	IFR	<input type="text"/>	
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...	A	IFR	<input type="text"/>	
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...	A	IFR	<input type="text"/>	
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...	B	IFR	<input type="text"/>	
<input type="checkbox"/>		TE-0001-629-SHP-DWG-OU...	A	IFR	<input type="text"/>	
<input type="checkbox"/>		TE-0001-630-SHP-DWG-OU...	B	IFR	<input type="text"/>	

You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the document you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The documents are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline column to the scenario above, the documents would be grouped by status and then discipline within the status.

↑ Sts ×		↑ Discipline ×					
	<input type="checkbox"/>	Document No. ↑	Rev	Sts	Review status	Review history	
	<input type="checkbox"/>						
▼ Sts: IFC							
▼ Discipline: ARCH							
	<input type="checkbox"/>	A-G-FP-0005	D	IFC			
▼ Sts: IFR							
▼ Discipline: 8MILES							
	<input type="checkbox"/>	CN-632021-001-CN-632021-...	SD1	IFR			
▼ Discipline: CIV-MD							
	<input type="checkbox"/>	TE-0001-625-PRD-DATA-OU...	A	IFR			
	<input type="checkbox"/>	TE-0001-625-PRD-DATA-OU...	A	IFR			
	<input type="checkbox"/>	TE-0001-625-PRD-DATA-OU...	B	IFR			
	<input type="checkbox"/>	TE-0001-629-SHP-DWG-OU...	A	IFR			
▼ Discipline: STRU							
	<input type="checkbox"/>	TE-0001-630-SHP-DWG-OU...	B	IFR			

5.7 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 File Viewer.

To comment on a document:

1. From the **Document Register**, locate the document to comment on.
2. Click on the Document No. link to open the details screen.
3. Select the **Comments** Tab.

Document No: QAS-PLAN-L1-004 Rev: A Sts: IFR

DETAIL LINKS **COMMENTS** FILE VIEWER USER ACCESS TRANSMITTAL HISTORY

Cancel Save

Comm...	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by	Commented by company	Comments	Annotation type	File Name	Category	Closed out
<input type="checkbox"/>	01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Is this the correction v...			Moderate	<input type="checkbox"/>
<input type="checkbox"/>	02	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Check clearance at L...			Major	<input type="checkbox"/>

4. Click the **plus** icon to add a new comment. or click

+

Comm...	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by	Commented by company	Comments
<input type="checkbox"/>	01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Houston Contracting	Is this the correction v...

- You can also duplicate a comment by selecting a comment and clicking the **Duplicate** icon.

+

Duplicate

Comm...	Item	Date	Rev	Sts	Raised by	Raised by company	Commented by
<input checked="" type="checkbox"/>	01	05-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks

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

New Comment

* Comments

Plain Text

Arial 13 px **B** *I* U [List Icons]

* Category:
Select one...

Raised by company: Select one... Raised by: Select one...

Send document comments to
 Originator Document recipients

Attach files:
[+] Attach files [Download all] [Download selected]

There are no attachments uploaded.

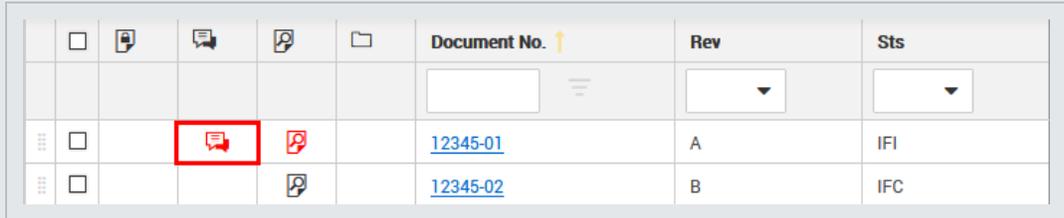
Items: 0

Cancel Save

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.

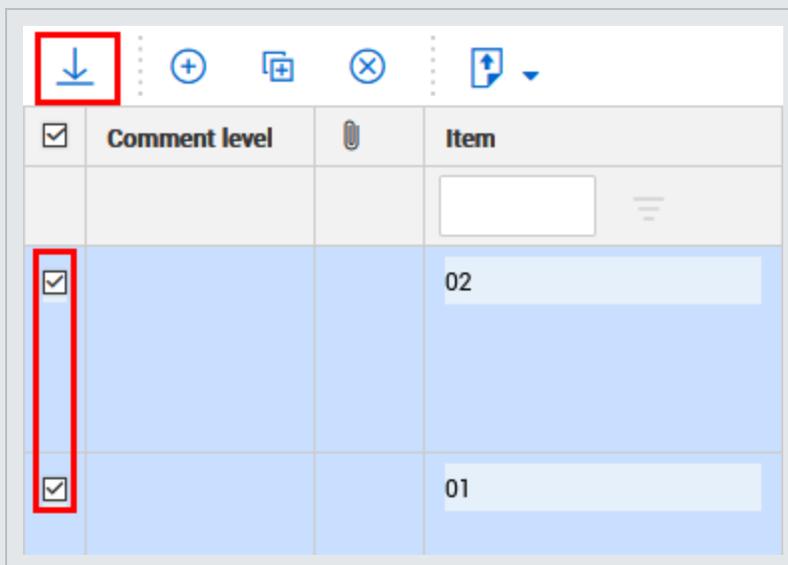
NOTE

- 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.



<input type="checkbox"/>					Document No. ↑	Rev	Sts
					<input type="text"/>	<input type="text"/>	<input type="text"/>
					12345-01	A	IFI
					12345-02	B	IFC

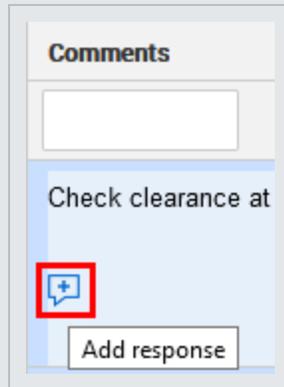
- Comments can be emailed automatically by ticking the relevant boxes to send your comments to any or all of the following:
 - The Document Originator
 - The Review Coordinator
 - Document recipients
- To apply the same comments against multiple documents you have access to, select the documents in the Document Register, click **Actions** then **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, select the comments and click the **download** icon.



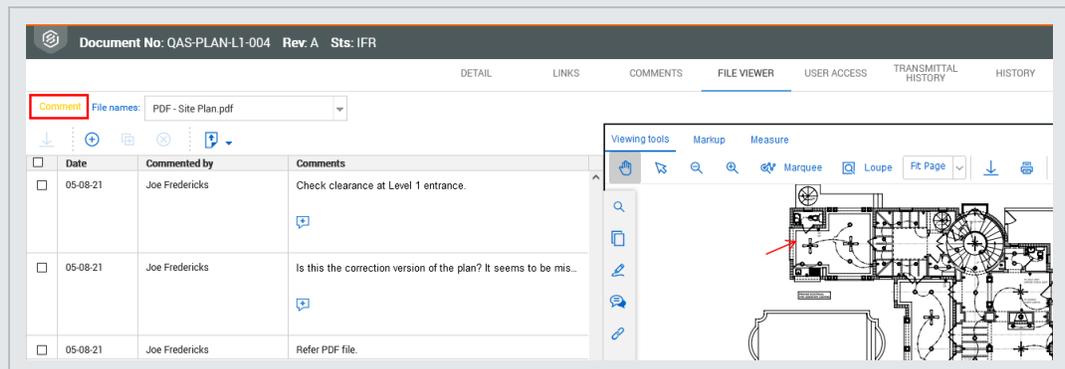
<input checked="" type="checkbox"/>	Comment level		Item
			<input type="text"/>
<input checked="" type="checkbox"/>			02
<input checked="" type="checkbox"/>			01

NOTE

- 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 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 File Viewer.. An image of the document and the comments text box can be seen together. From the File Viewer, click the **Comment** button..



- 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.

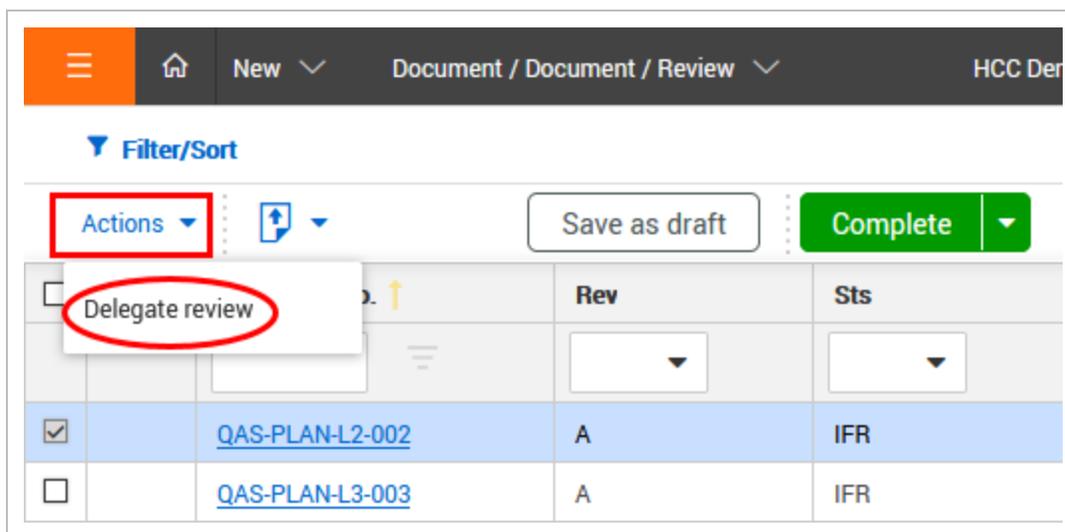
NOTE

- 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.

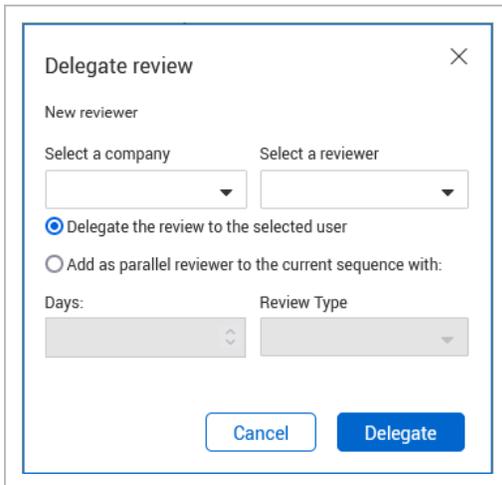
5.8 DELEGATE REVIEW

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.

- Select one or more Documents from the Review Screen.
- Click Actions, and then select **Delegate Review**. This feature is only available from the [Review screen](#).



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



Delegate review

New reviewer

Select a company Select a reviewer

Delegate the review to the selected user

Add as parallel reviewer to the current sequence with:

Days: Review Type

Cancel Delegate

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**. If the Review/Release configuration does not allow days to be added to the review, you cannot edit the Days field.
5. Select **Delegate**.

5.9 EXTERNAL REVIEWS

Documents created with Bluebeam or Microsoft products, such as Word, Excel, and PowerPoint, are frequently used in projects. Document lets you send documents in a document workflow to Bluebeam and Microsoft Office 365 to use the tools in those products to review documents.

The following topics describe the Microsoft Office integration. For information about integration with Bluebeam, see [Bluebeam](#).

5.10 ACTIVATE MICROSOFT OFFICE REVIEW INTEGRATION

Before you can collaborate in Microsoft Office 365, you must activate the Microsoft Office integration for the project. After the integration is complete, anyone in the company can collaborate in Office.

To enable the feature, you must raise a request with the Project Delivery team.

5.10 Step by Step 1 — Activate Microsoft Office review integration

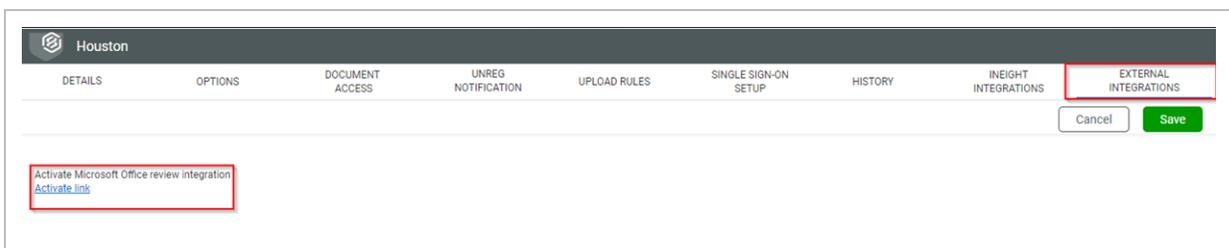
Summary: Activate the Microsoft Office review integration so that contacts in your company can send documents in a workflow to an external review in Office 365.

Considerations: The company must have Microsoft Office 365 available. You must create a service account in the Office 365 space to ensure that any access requests made by users are centralized through that account. The person setting up the account must be an administrator or relevant user for the company that is enabling the integration. The integration relies on that company's Microsoft Office 365 subscription.

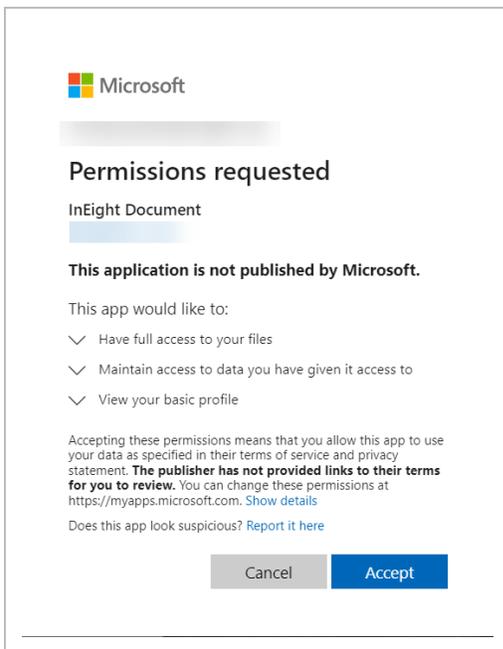
This task is performed only one time per project for the company.

Quick steps:

1. Click **Activate link** under Activate Microsoft Office review integration on the Companies > **External Integrations** page. The Microsoft permissions page for your organization opens.



2. Sign in to the Office 365 account using the credentials for the service account. This account should not be a personal account, and the project administrator should not provide details for another company. A message is sent if you try to use the same credentials as your own account.
3. Click the **Accept** button to gain the required permissions.



A success message indicating the company on the project has been linked to Microsoft Office integration opens in a new window.

4. Close the success message window.

What's next: Contacts in your company can send documents to Office 365 for external review. The link in External Integrations page is changed to Remove link. If you no longer want the integration with Office 365, click **Remove link**.

5.11 MANAGE THE MICROSOFT OFFICE REVIEW WORKFLOW

The Manage document review page (Documents > **Manage workflow**) lets the review initiator quickly sort and search for documents and initiate the external review workflow.

NOTE

Changes made in the viewer are not shown in the file in Office. You must use one or the other during review. Changes in Office come back into Document after the review.

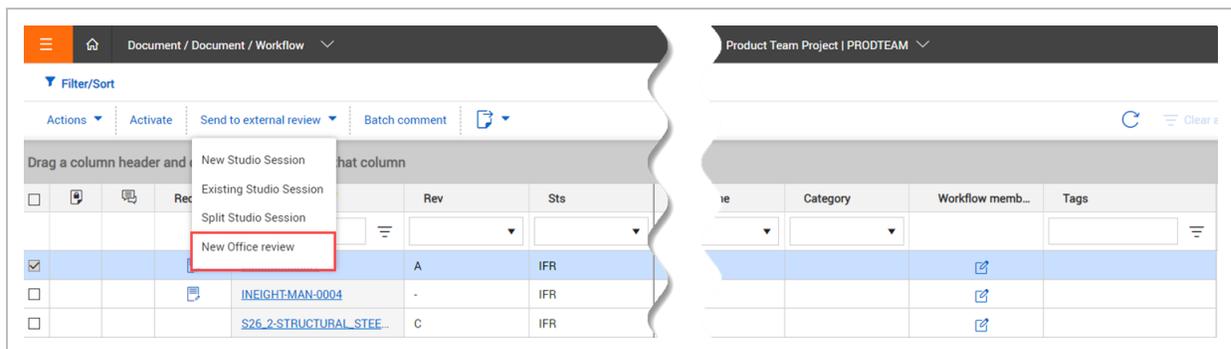
5.11 Step by Step 1 — Manage the external review workflow

Summary: Use the manage workflow features to send a document to Microsoft Office 365 for collaborative review.

Considerations: The documents must be uploaded into a restrained status and contain only one Office file format. If a document contains multiple Office-supported formats, you cannot initiate the review. The review coordinator and review initiator must be from the same company. For information about submitting documents for review, see [Upload of Documents for Review](#).

Quick steps:

1. From the Manage document review page, select the documents you want to send to review.
2. Click **Send to external review**, and then select **New Office review**.



The Activate review dialog box opens.

3. Select **Default workflow** or **Custom workflow**, and then click **Apply**. See [Activating a Default Workflow](#) and [Activating a Custom Workflow](#) for more information about the default and custom review workflows. The workflow is activated, and the documents are sent to the Review register.

What's next: The reviewer can open the documents in Office 365 to conduct collaborative reviews..

NOTE You can send documents to users from different companies, but you must request it through InEight. The company must ensure that external companies can access the OneDrive account to access the files in review. A standard Microsoft message is sent if this access is not provided, and other company users will not be able to access the files.

5.12 REVIEW A DOCUMENT IN MICROSOFT OFFICE

You can open a document that has been sent for external review in Microsoft Office from the Review register.

NOTE

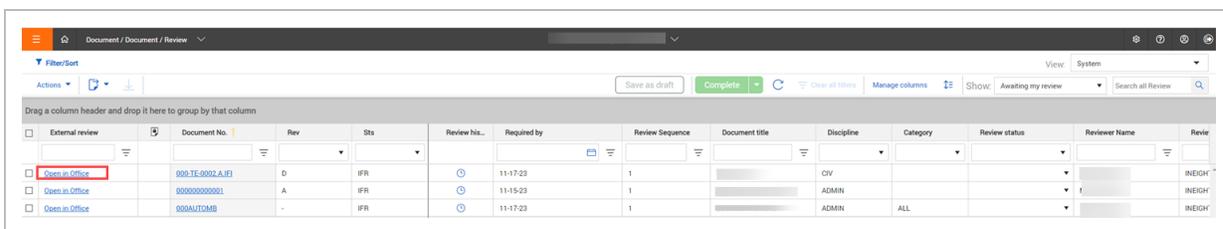
Changes made in the viewer are not shown in the file in Office. You must use one or the other during review. Changes in Office come back into Document after the review.

5.12 Step by Step 1 — Review a document in Microsoft Office

Summary: Send a document to review in Office 365 to take advantage of collaborative review features in Office products.

Considerations: The document must have already been sent as a New Office review in the review workflow register. See [Manage the Microsoft Office review workflow](#) for more information about sending a document to Office 365.

1. From the Review register, click the **Open in Office** link for the document you want to review. The document opens in an Office 365 application, such as Word or Excel, in a new window.



External review	Document No.	Rev	Sts	Review his.	Required by	Review Sequence	Document title	Discipline	Category	Review status	Reviewer Name	Review
Open in Office	000-TE-0002-A-1E1	D	IFR	11-17-23		1		CIV				INEIGH
Open in Office	000000000001	A	IFR	11-15-23		1		ADMIN				INEIGH
Open in Office	000AUT0000	-	IFR	11-17-23		1		ADMIN	ALL			INEIGH

2. Review the document in the Office application. You can use the tools in the Office product to collaborate with other reviewers.
3. After reviewing, return to the Review register, and then update the status.
4. Select the document, and then click the **Complete** button. The document is removed from the Review register.

For more information about reviews, see [Reviewing Documents](#).

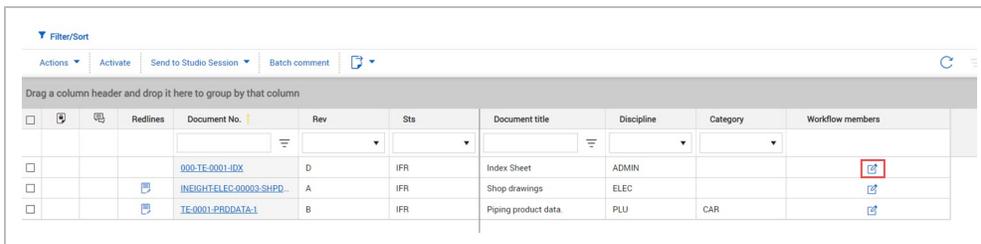
5.13 MANAGE REVIEW COORDINATORS

You can update the review coordinator for a document individually or in bulk.

5.13 Step by Step 1 — Update the review coordinator for a single document

You can edit the workflow members when you want to update the review coordinator for a single document.

1. From the Document workflow page (Documents > **Manage workflow**), click the **Add/Edit workflow member** icon for a document.



Filter/Sort

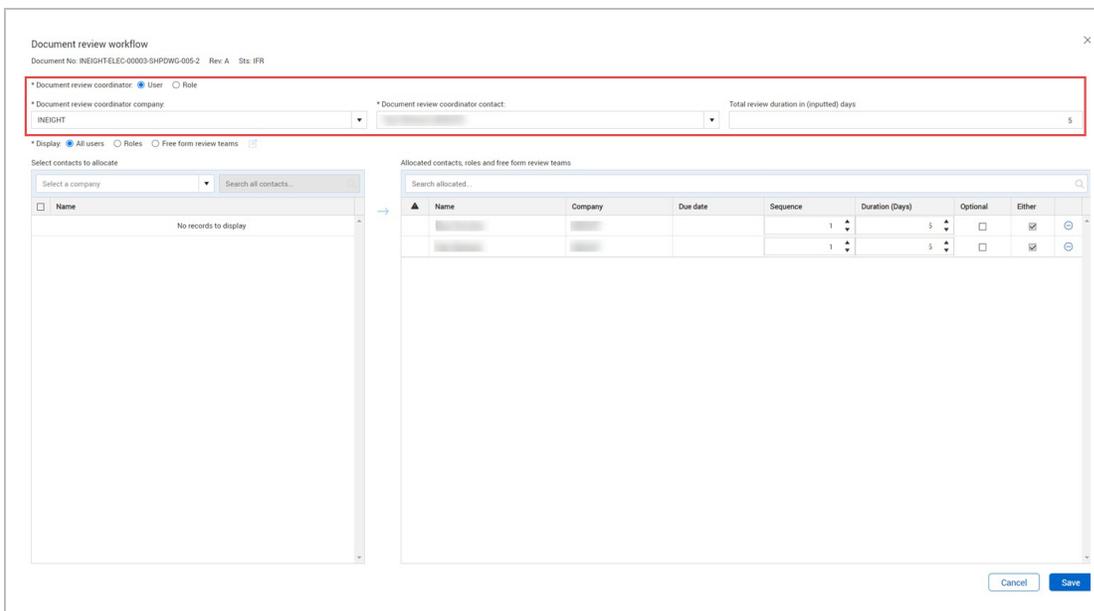
Actions Activate Send to Studio Session Batch comment

Drag a column header and drop it here to group by that column

Redlines	Document No.	Rev	Sta	Document title	Discipline	Category	Workflow members
	000-TE-0001-IDX	D	IFR	Index Sheet	ADMIN		
	INEIGHT/ELEC-00003-SHPD	A	IFR	Shop drawings	ELEC		
	TE-0001-PRDDATA-1	B	IFR	Piping product data	PLU	CAR	

The Document review workflow dialog box opens.

2. Use the Document review coordinator radio buttons and drop-down lists to select a user or role.



Document review workflow

Document No: INEIGHT/ELEC-00003-SHPDWG-005-2 Rev: A Sta: IFR

* Document review coordinator: User Role

* Document review coordinator company: INEIGHT

* Document review coordinator contact: [Redacted]

Total review duration in (inputted) days: 5

* Display: All users Roles Free form review teams

Select contacts to allocate

Select a company: [Redacted] Search all contacts...

No records to display

Allocated contacts, roles and free form review teams

Search allocated...

Name	Company	Due date	Sequence	Duration (Days)	Optional	Either
[Redacted]	[Redacted]		1	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[Redacted]	[Redacted]		1	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>

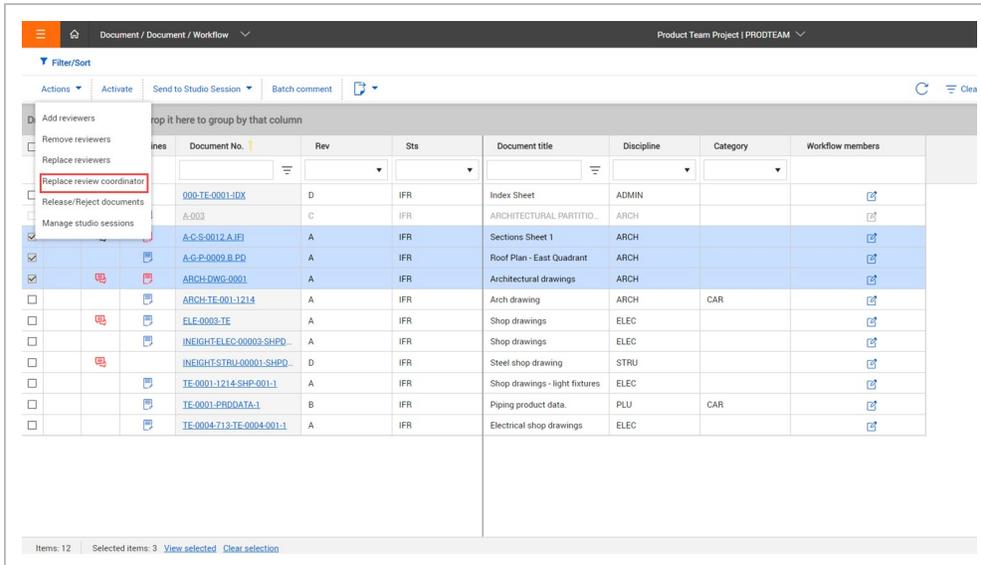
Cancel Save

3. Enter the review coordinator company and contact, and then click **Save**.

5.13 Step by Step 2 — Update the review coordinator for multiple documents

Use these steps when you want to update multiple documents with the same review coordinator.

1. From the Document workflow page (Documents > **Manage workflow**), select one or more documents, and then expand the **Actions** menu and select **Replace review coordinator**.



The Replace Review Coordinator dialog box opens.

2. Use the Document review coordinator radio buttons and drop-down lists to select a user or role.

The dialog box titled 'Replace Review Coordinator' contains the following fields and controls:

- * Document review coordinator: User Role
- * Document review coordinator company:
- * Document review coordinator contact:
- Buttons: Cancel, Replace

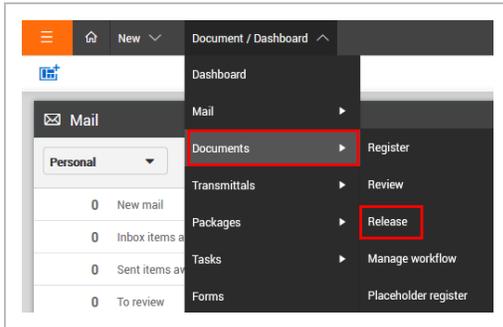
3. Enter the review coordinator company and contact, and then click **Replace**.

5.14 DOCUMENT REVIEW APPROVAL/RELEASE

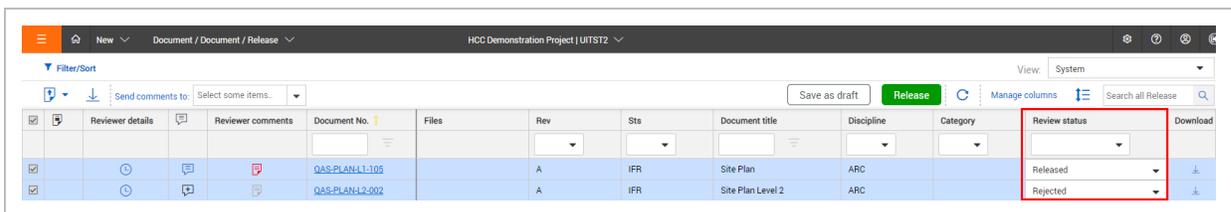
After all reviewers have completed their reviews of a restrained document in a workflow, the Review Coordinator receives an email notification. The Review Coordinator uses the **Document Release** screen to conduct their own review, select comments to include, and apply a review status, which will either releases or rejects the document.

Using the Document Release screen:

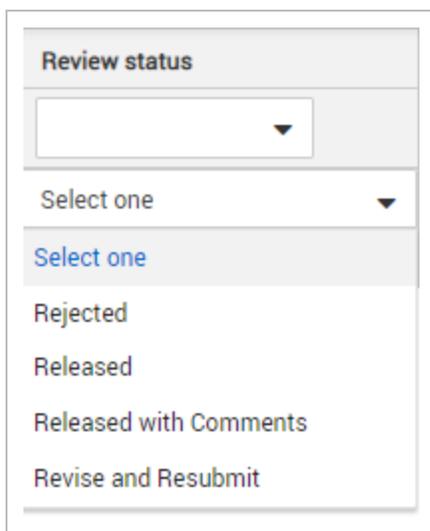
1. From the **Module Menu**, hover over **Documents** and select **Release**.



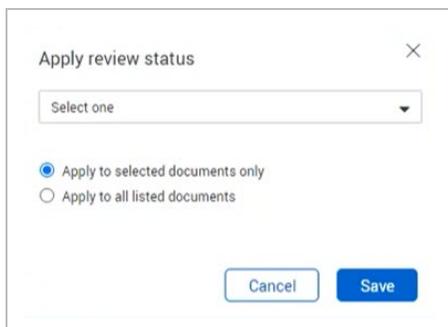
2. The Documents awaiting release screen defaults to displaying **All documents awaiting release** by the logged in Review Coordinator.



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.
 - For a single document, select the document, and then select a status from the Review status drop-down list.

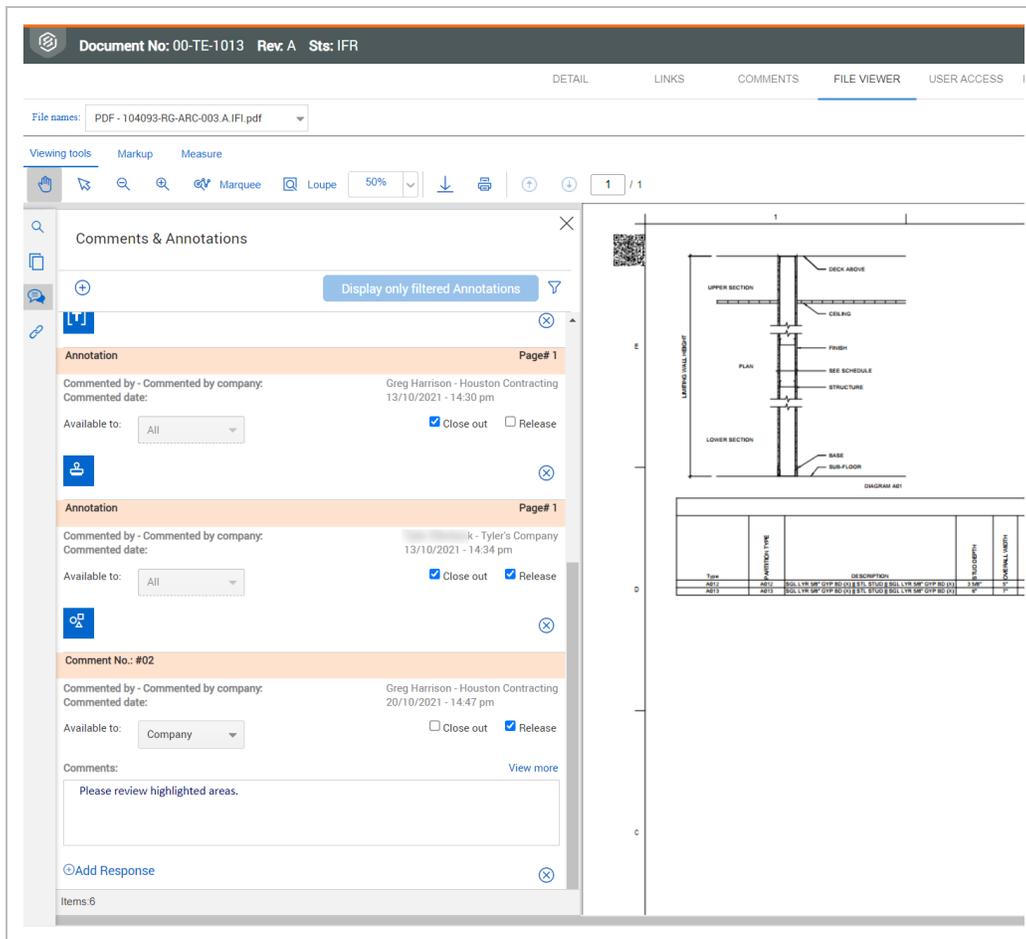


- For multiple documents, select the documents, and then click Actions > **Apply review status**. The Apply review status dialog box opens, and then you can select the status. You can apply the status to the selected documents only or to all documents in the view.



Click **Save** to apply the status.

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 able to view outstanding Reviewer comments and close them out as required:
 - a. Click the Redline  icon to open the File Viewer to view markups and comments made against the file. Click the **Comments** tab to see a full list of comments.



- b. View reviewer comments and annotations. Select the **Close out** check box for each to close them out. Select the **Release** check box if you are ready to release the comment. The Review comments page is updated.
- 7. 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.
- 8. Click the **Add Text** icon in the Comments column and enter reviewer comments as the review coordinator.

Filter/Sort

Send comments to: Select some items..

<input type="checkbox"/>		Reviewer details		Reviewer comments	Document No. ↑
<input type="checkbox"/>					<input type="text"/>
<input checked="" type="checkbox"/>					QAS-PLAN-L1-105
<input type="checkbox"/>					QAS-PLAN-L2-002

Review coordinator's comments

Document No.: QAS-PLAN-L1-105
 Rev: A
 Status: IFR
 Title: Site Plan

Review coordinator's comments

Arial 13 px **A** **B** *I* U

* Category: [Select reviewer comments to include with your summary](#)

Attach files: Download all Download selected

There are no attachments uploaded.

Items: 0

Apply to all documents

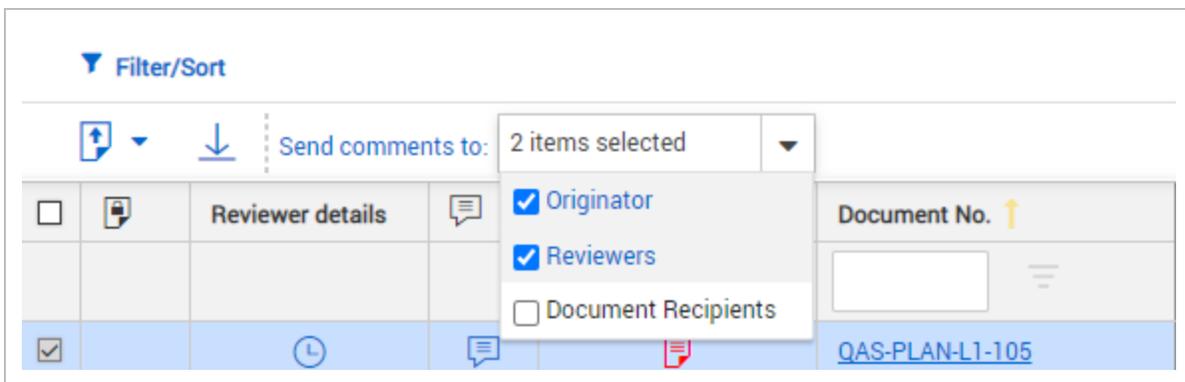
- To include comments and/or redline mark-ups made by other reviewers, click the link **Select Reviewer comments to include with your summary**. Select the comments to include by ticking the boxes against them. To view any attachments click the paper clip icon and **Download** when prompted.

Review comments for Document no: QAS-PLAN-L1-105 Rev: A Sts: IFR

<input type="checkbox"/>	Items	Date	R..	Sts	Raised by	Company	Commented by	Comments	Annotation type	File name	Category
<input checked="" type="checkbox"/>	03	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer to comment 1.			Moderate
<input checked="" type="checkbox"/>	02	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Review clearance ...			Major
<input type="checkbox"/>	01	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Review of measur...			Major
<input type="checkbox"/>		06-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Line	Site Plan.pdf	
<input type="checkbox"/>		06-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Highlight	Site Plan.pdf	

- To view the redline layers made by reviewers, refer to [step 6a](#).

- Click **Close** when completed to return to the Review Coordinators comments window.
- Use the **Attach files** button to select one or more external files to include as part of your Review Coordinators comments.
- Select a **Category** if required.
- Click **OK** to close the Review Coordinator’s comments window.
- From the Release screen, select who the review comments should be sent to: Originator, Reviewers or Document Recipients.



- To release the documents where the above steps have been completed ([ensure a release status has been set](#)), click **Release**..

<input checked="" type="checkbox"/>	Reviewer details	Reviewer comments	Document No.	Files	Rev	Sts	Document title	Discipline	Category	Review status	Download	Redlines	Scheduled Completion
<input checked="" type="checkbox"/>			QAS-PLAN-L1-105		A	IFR	Site Plan	ARC		Released	↓	📄	06-08-21
<input checked="" type="checkbox"/>			QAS-PLAN-L2-002		A	IFR	Site Plan Level 2	ARC		Rejected	↓	📄	06-08-21

Reviewers and review coordinators can download the original file with all markups prior to consolidation after the document is released.

NOTE

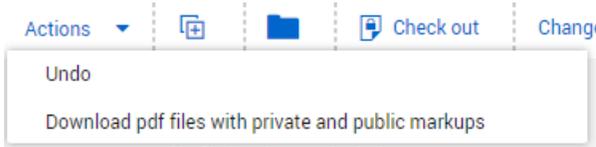
- **If the document is released:** The document is distributed automatically using email notifications.
- **If the document is rejected:** only the Originator, Review Team and Admins retain access to the document. Users from the originating company will not receive access even if they are part of the Distribution Rules / Discipline Matrix.
- The Document Register is updated with the Review Status applied.
- 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.
- 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.
- The review coordinator can change private comments to public after the document has been released. See 5.14 Step by Step 2 — Change private comments to public on page 135.
- 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.

5.14 Step by Step 1 — Download prior to consolidation

Some projects require the ability to download or export each document that contains all review comments and markups made during the review workflow but prior to the consolidation of the markups and comments and subsequent release of the document.

This option is available in the PDF viewer only and is only supported with Adobe.

1. From the PDF viewer, expand the **Actions** menu, and then select **Download pdf files with private and public markups**.



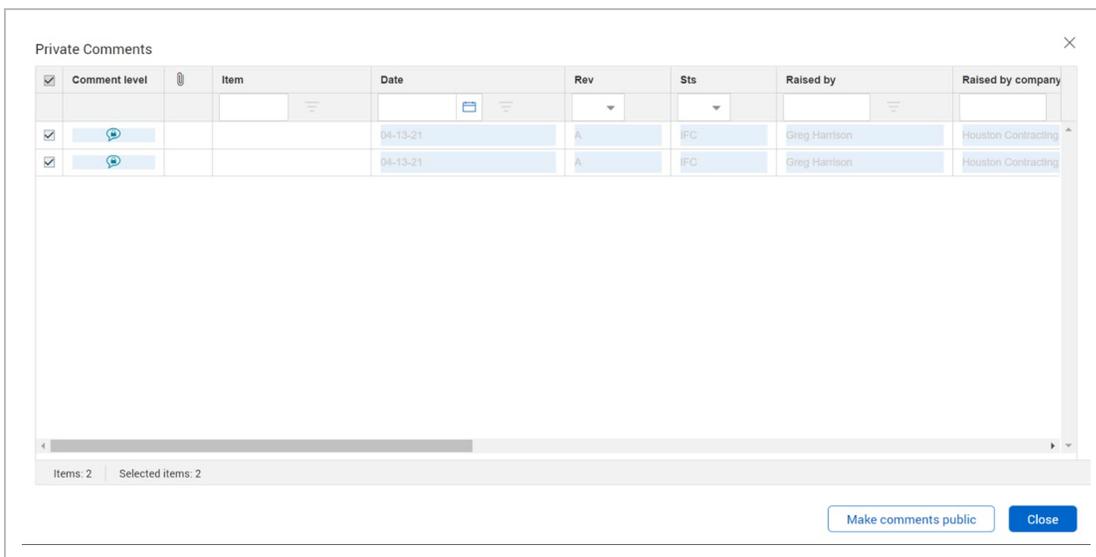
The PDF files are provided in a zip file.

2. Extract the zip file.
3. Open the PDF file.

5.14 Step by Step 2 — 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.

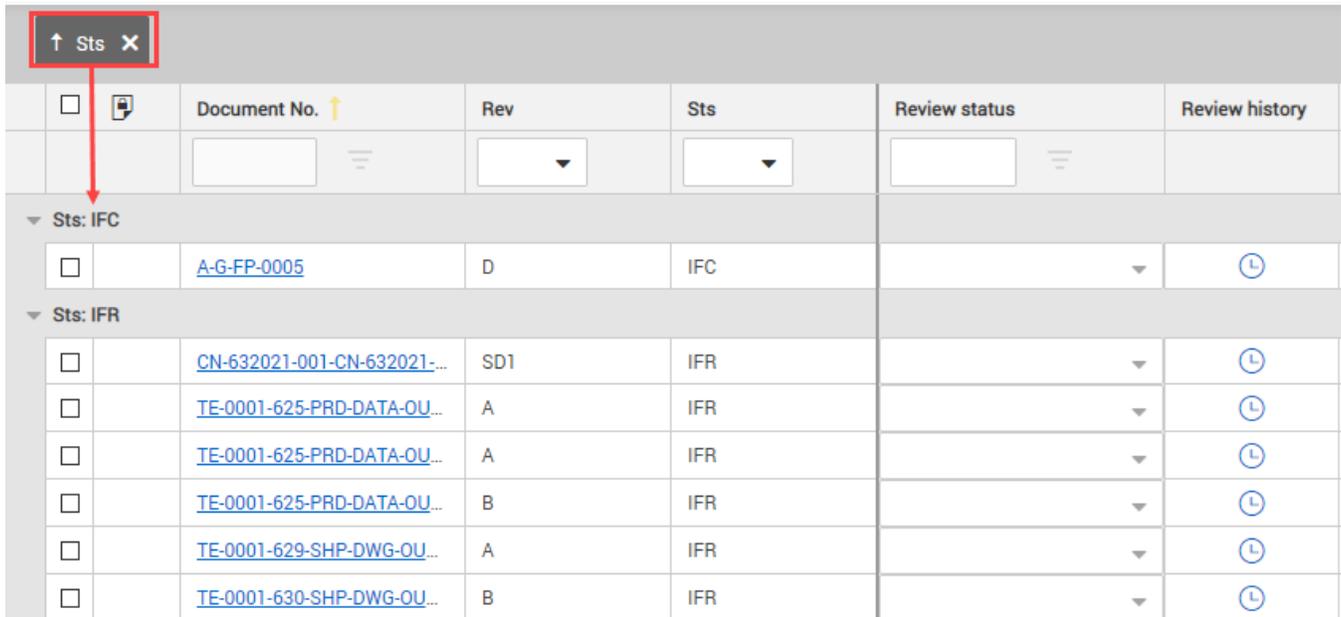
1. From the Comments tab, expand the Actions menu, and then click **View private comments** to see a list of all comments that have not been published.
2. Select the comments you want to make public, and then click **Make comments public**.



5.14.1 Group items in the Document release register

You can group entries in the Document release register by available register columns to help you quickly locate documents.

The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Sts column to the bar, the documents are grouped by status. In the image below, the documents are grouped by status in ascending order. The documents with no status would come first, followed those with IFC status and then those with IFR status.



↑ Sts ×						
<input type="checkbox"/>		Document No. ↑	Rev	Sts	Review status	Review history
▼ Sts: IFC						
<input type="checkbox"/>		A-G-FP-0005	D	IFC	▼	
▼ Sts: IFR						
<input type="checkbox"/>		CN-632021-001-CN-632021-...	SD1	IFR	▼	
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...	A	IFR	▼	
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...	A	IFR	▼	
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...	B	IFR	▼	
<input type="checkbox"/>		TE-0001-629-SHP-DWG-OU...	A	IFR	▼	
<input type="checkbox"/>		TE-0001-630-SHP-DWG-OU...	B	IFR	▼	

You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the document you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The documents are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline column to the scenario above, the documents would be grouped by status and then discipline within the status.

↑ Sts ×		↑ Discipline ×		Document No. ↑	Rev	Sts	Review status	Review history
<input type="checkbox"/>								
▼ Sts: IFC								
▼ Discipline: ARCH								
<input type="checkbox"/>		A-G-FP-0005		D		IFC		
▼ Sts: IFR								
▼ Discipline: 8MILES								
<input type="checkbox"/>		CN-632021-001-CN-632021-...		SD1		IFR		
▼ Discipline: CIV-MD								
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...		A		IFR		
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...		A		IFR		
<input type="checkbox"/>		TE-0001-625-PRD-DATA-OU...		B		IFR		
<input type="checkbox"/>		TE-0001-629-SHP-DWG-OU...		A		IFR		
▼ Discipline: STRU								
<input type="checkbox"/>		TE-0001-630-SHP-DWG-OU...		B		IFR		

5.15 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.

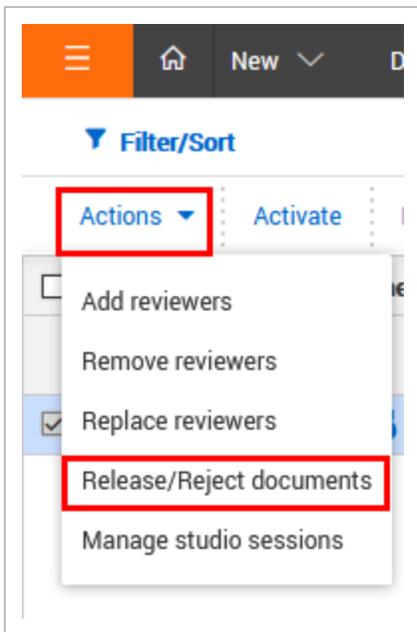
5.16 DOCUMENT RELEASE WITHOUT ACTIVATING A WORKFLOW

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.

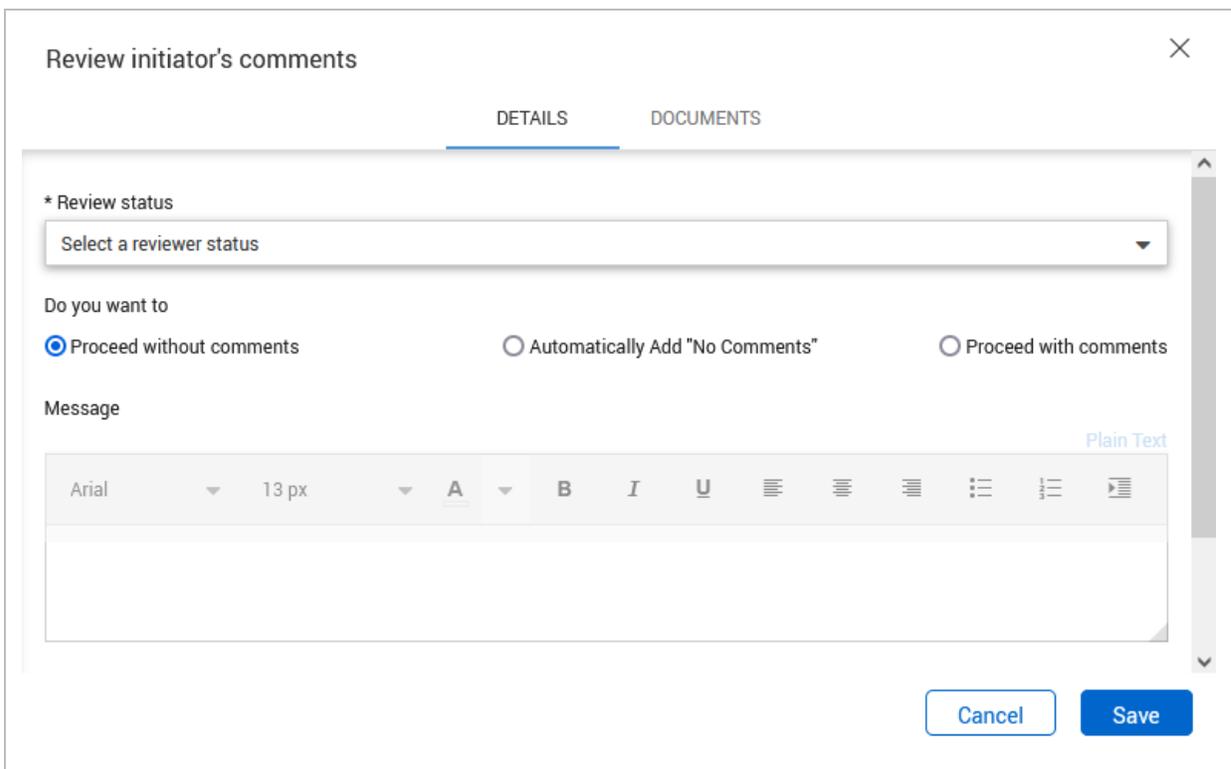
This is useful where the Review Initiator assesses the submitted document and finds that it requires it to be re-submitted. In this situation they can immediately reject the document rather than having to put it through a full workflow first.

To release/reject a document prior to it being activated for a workflow:

1. From the **Module Menu**, hover over **Documents** and select **Manage workflow**.
2. Select the Document(s) to be Released/Rejected without activating a workflow.
3. From **Actions** 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 **Save**.

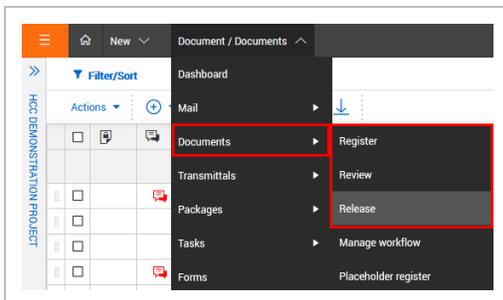
NOTE

- 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

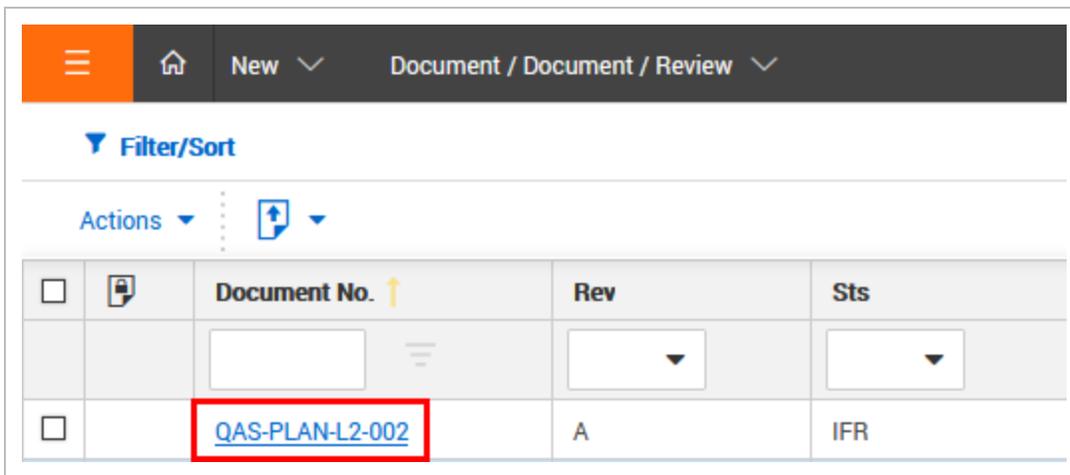
5.17 VIEW REVIEW STATUS

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

1. Open the **Document or Review Register** . .



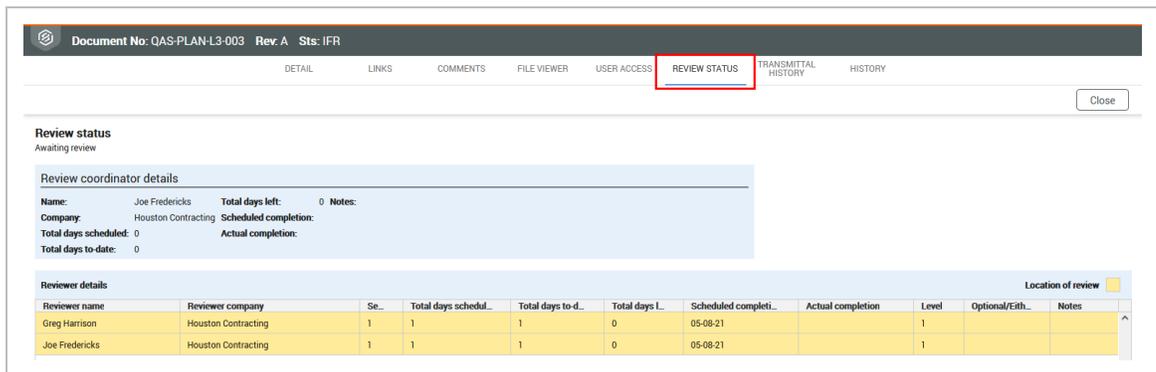
2. Click on the Document Number link to open the details screen.



3. Select the **Review Status** Tab.

The review status tab 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.

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.