



**XL UPLOAD USER
GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – GETTING STARTED

For information on Getting Started with XL Upload, see the links below.

1.1 INTRODUCING XL-UPLOAD

XL-Upload is unique application used to upload drawings and controlled documents to the web-based project collaboration system.

XL-Upload enables parties to upload one or more documents of any format to using a Microsoft Excel workbook. XL-Upload requires only Microsoft Excel, an Internet connection and an Email application (e.g. Outlook, Outlook Express, Lotus Notes, Novell GroupWise, etc.).

In summary, the process that takes place is:

1. Documents are selected from within XL-Upload.
2. User populates document details in the spread sheet.
3. User validates document details via XL-Upload directly from the server.
4. XL-Upload uploads the physical document and the attributes of the document (such as the Drawing Number, Title, Revision etc.) entered in the spread sheet directly to the document register in your project. XL Upload runs as a process in the background, so you can continue with your other tasks.
5. The documents go through a final validation at the server and will then appear in the Document Register.

NOTE

Before you can use XL-Upload you will need to have been set up as a user of the system with the correct access level to upload documents. If you have not been allocated a User ID or do not have the correct access contact your Company administrator.

1.2 DOWNLOADING AND INSTALLING XL-UPLOAD

The XL-Upload program can be downloaded from the following link:

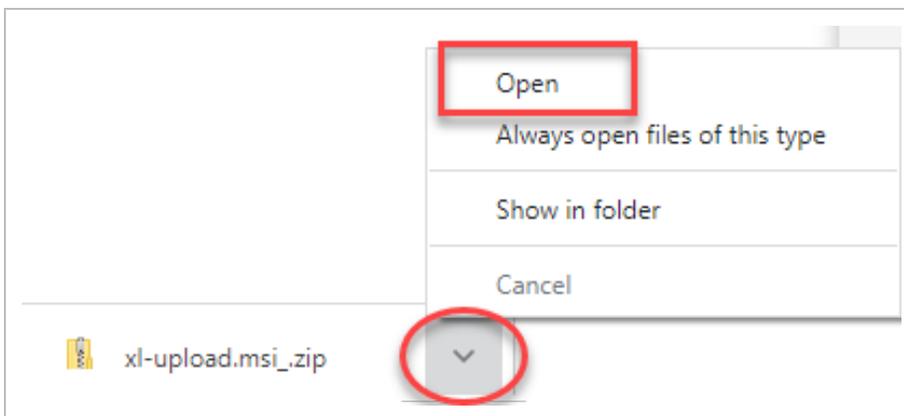


[Download latest version of XL-Upload.](#)

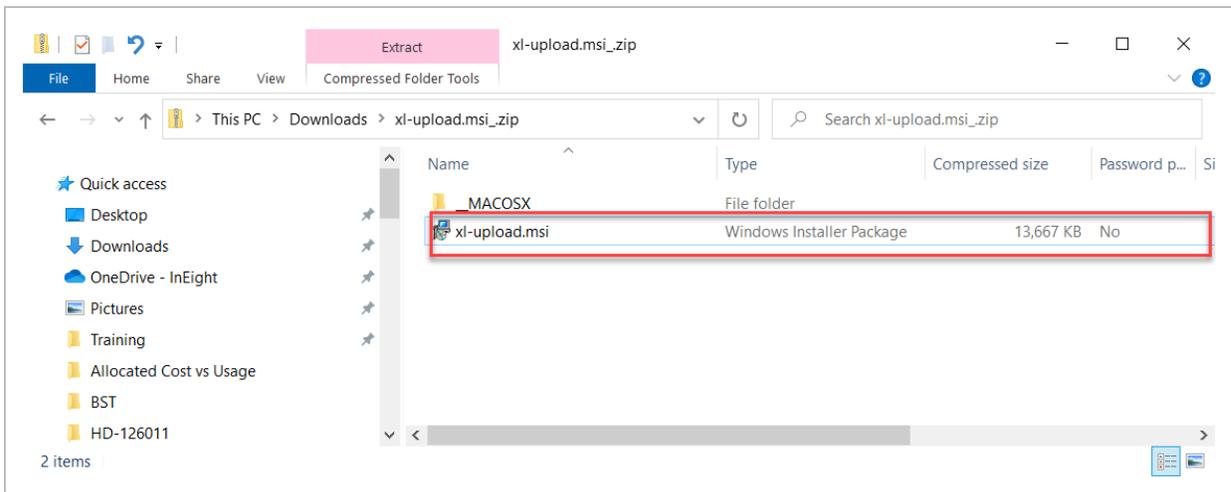
1. Click the **Download Now** link to start the download.



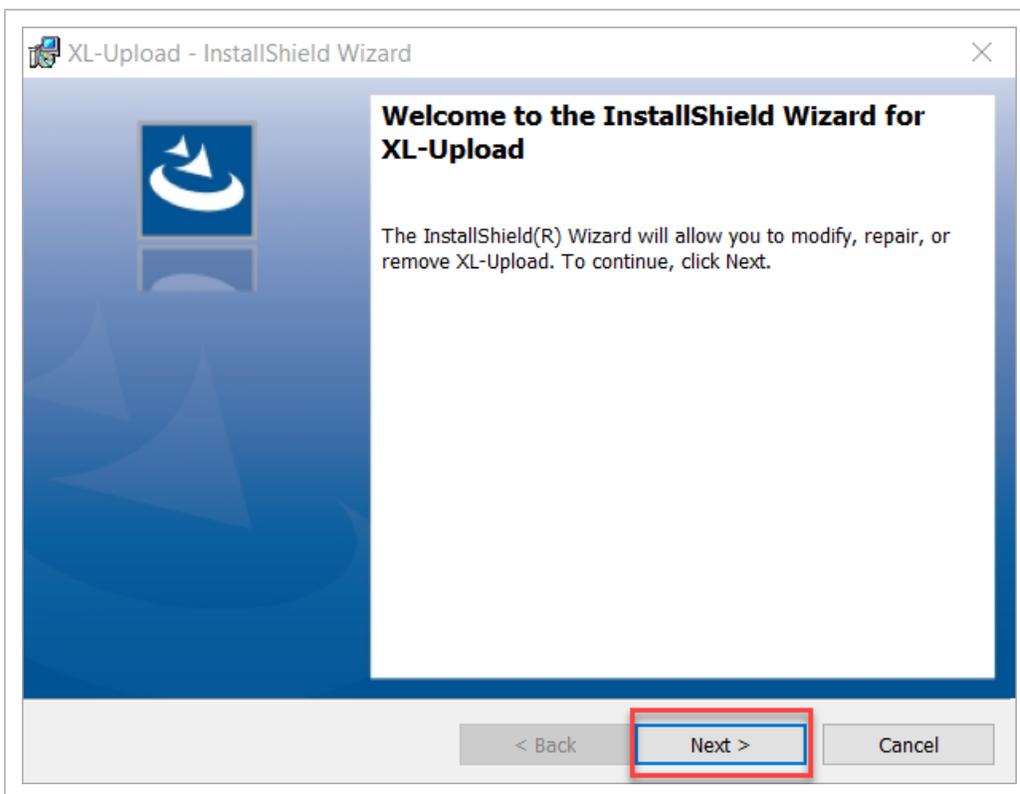
2. Select Open once file has downloaded.



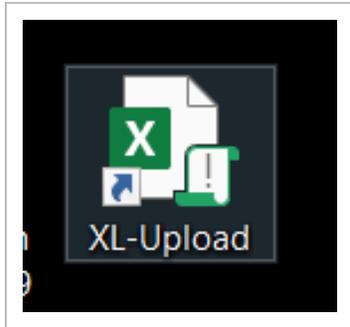
3. Double click the **xl-upload.msi** file.



4. When the Install Shield wizard appears, follow the on-screen instructions.



5. Once the installation is complete you will find a shortcut to XL-Upload.xls located on your Desktop.

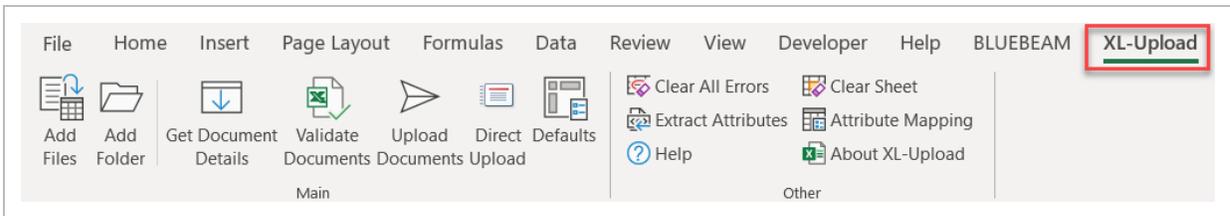


CHAPTER 2 – SETTING UP XL-UPLOAD

For information on Setting UP XL Upload, see the links below.

2.1 DEFAULT SETTINGS

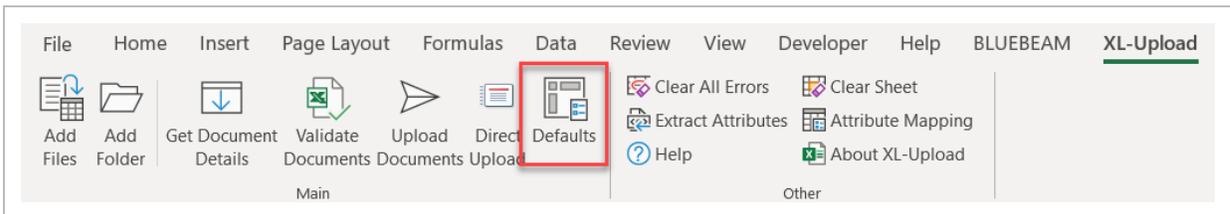
1. Open XL-Upload located on your desktop. This will open an empty work sheet with a new Menu **XL-Upload**.



NOTE

- a. If you are using MS Excel 2007 or above, you will need to click the **Add-ins** menu first, and then select XL-Upload.
- b. If you are using an older version of MS Excel you will need to set your Microsoft Excel’s Macro Security to Medium (Tools \ Macros \ Security).

2. When you open XL-Upload for the first time you will need to complete some configuration information (default settings) prior to using the program. This establishes your User information and identifies the project you are working on.



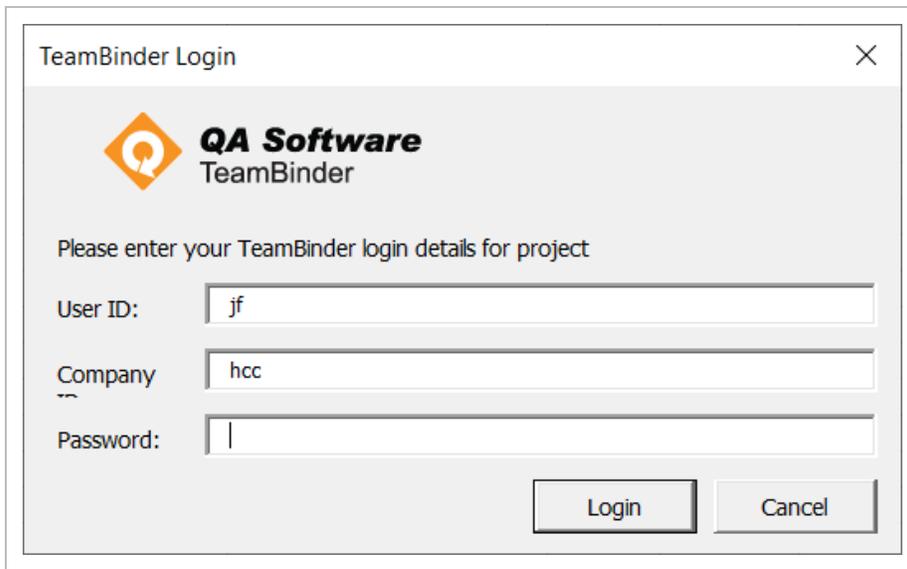
The screenshot shows a dialog box titled "XL-Upload - Document upload utility for TeamBinder". It has a "Defaults" tab selected. The dialog contains the following fields and options:

- TeamBinder Server* :** (e.g. www.teambinder.com) - A drop-down menu with "www.teambinder.com" selected.
- Login Details** - A section with two radio buttons: "TeamBinder Login" (selected) and "Company Login (Single Sign-On)".
- TeamBinder User ID** - A text box containing "jf".
- TeamBinder Company ID*** - A text box containing "hcc".
- Project Number* :** A text box containing "training501".
- Email Files to* :** A drop-down menu with "tb@tbupload.com" selected.
- Email Application** - A drop-down menu with "Microsoft Outlook" selected.
- Optional Information** - A section with two sub-sections:
 - File Name Format:** A series of four drop-down menus: "DocumentN", "Rev", "Sts", and "Title", separated by hyphens.
 - Extract DWG File Attributes:** A drop-down menu with "Using XL-Upload" selected.

At the bottom of the dialog are "OK" and "Cancel" buttons.

3. Click on the **Defaults** menu button from the XL-Upload menu. All of these settings are relevant to the project you are uploading documents to. You will be prompted to enter the following:
 - **User ID:** User ID that you use to log in.
 - **Company ID:** Company ID that you use to log in.
 - **Server:** Using the drop-down box, select the web address that you use to log in (e.g. www.teambinder.com).

- **Project Number:** Enter the Project Number.
 - **Email Files to:** Using the drop-down box, select the email address that you wish to upload the documents to. By default there is usually only one email address (e.g. tb@tbupload.com).
 - **Email Application:** Select the email application used if you do not have an internet connection at the time of uploading.
 - **File Name Format (Optional):** Allows you to automatically extract available document attributes from the filename of the document. In order to use this feature the filename mapping needs to be set up in the XL-Upload Defaults. More information can be found in Setting up File Name Formats section.
 - **File Formats and Methods of Extracting Attributes:** XL-Upload enables you to extract attributes from Microsoft Office (Word, Excel and PowerPoint & PDF files in addition to AutoCAD DWG files. More information can be found in Attribute Extraction section.
4. Click **OK**, you will then be prompted to enter your password.



TeamBinder Login

 **QA Software**
TeamBinder

Please enter your TeamBinder login details for project

User ID:

Company:

Password:

Login Cancel

2.2 SETTING UP FILE NAME FORMATS

XL-Upload can automatically extract available document attributes from the File Name of the document. The filename mapping needs to be set up in the XL-Upload Defaults.

1. Click **Defaults** on the **XL-Upload** menu.
2. Select the **File Name Format** fields that match your document naming convention. XL-Upload will automatically populate the spread sheet with the identified values.
3. Choose the (Ignore) option from the drop-down boxes for any part of your File Name that you do not want to appear in your XL-Upload spread sheet. You would use this option if your file name syntax had less than three fields, or if the file name contained irrelevant information.
4. Type your File Name 'Separator' in the small boxes between the drop-down boxes.

For example, your standard file-naming convention is 'A001_3_ELEC_Level 2 Electric Schematic'

'**A001**' is the document number, '**3**' is the document revision, '**ELEC**' is the Discipline and '**Level 2 Electrical Schematic**' is the Title.

In the File Format boxes you would select/enter: **DocumentNo _ Rev _ Discipline _ Title**

The screenshot shows a dialog box titled "XL-Upload - Document upload utility for TeamBinder". It contains several sections for configuration:

- Defaults:** Includes the QA Software TeamBinder logo and a "TeamBinder Server*" dropdown menu with "www.teambinder.com" selected.
- Login Details:** Features two radio buttons: "TeamBinder Login" (selected) and "Company Login (Single Sign-On)". Below are text boxes for "TeamBinder User ID" (containing "jf") and "TeamBinder Company ID*" (containing "hcc").
- Project Number*:** A text box containing "training501".
- Email Files to*:** A dropdown menu with "tb@tbupload.com" selected.
- Email Application:** A dropdown menu with "Microsoft Outlook" selected.
- Optional Information (highlighted in red):**
 - File Name Format:** A series of dropdown menus showing "DocumentNo", "-", "Rev", "-", "Sts", "-", and "Title".
 - Extract DWG File Attributes:** A dropdown menu with "Using XL-Upload" selected.

At the bottom of the dialog are "OK" and "Cancel" buttons.

2.3 USING CUSTOM FIELDS

If you work across different projects XL-Upload will add any customised fields which exist within your project. This feature is dependent on the project specified in **Defaults** from the XL-Upload menu. After specifying your project and saving you will be prompted to enter your user security credentials.

Once you have successfully entered your credentials, XL-Upload will review your project for any custom Document fields and add them into your XL-Upload sheet in the far right columns.

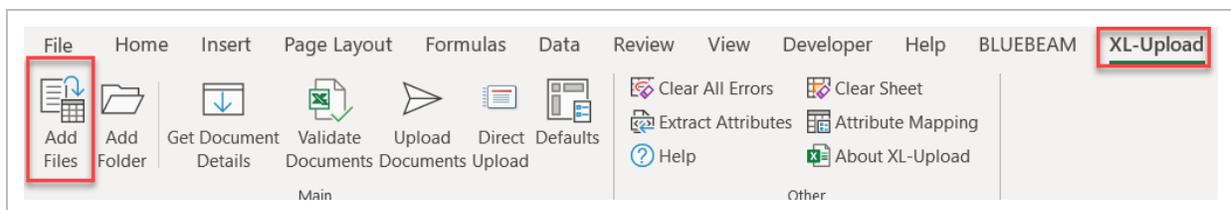
If the document module has custom fields that are linked to configuration tables, they will show as dropdown fields in XL-Upload after selecting 'Get Document Details' without the need to have a customised version of XL-Upload.

CHAPTER 3 – USING XL-UPLOAD

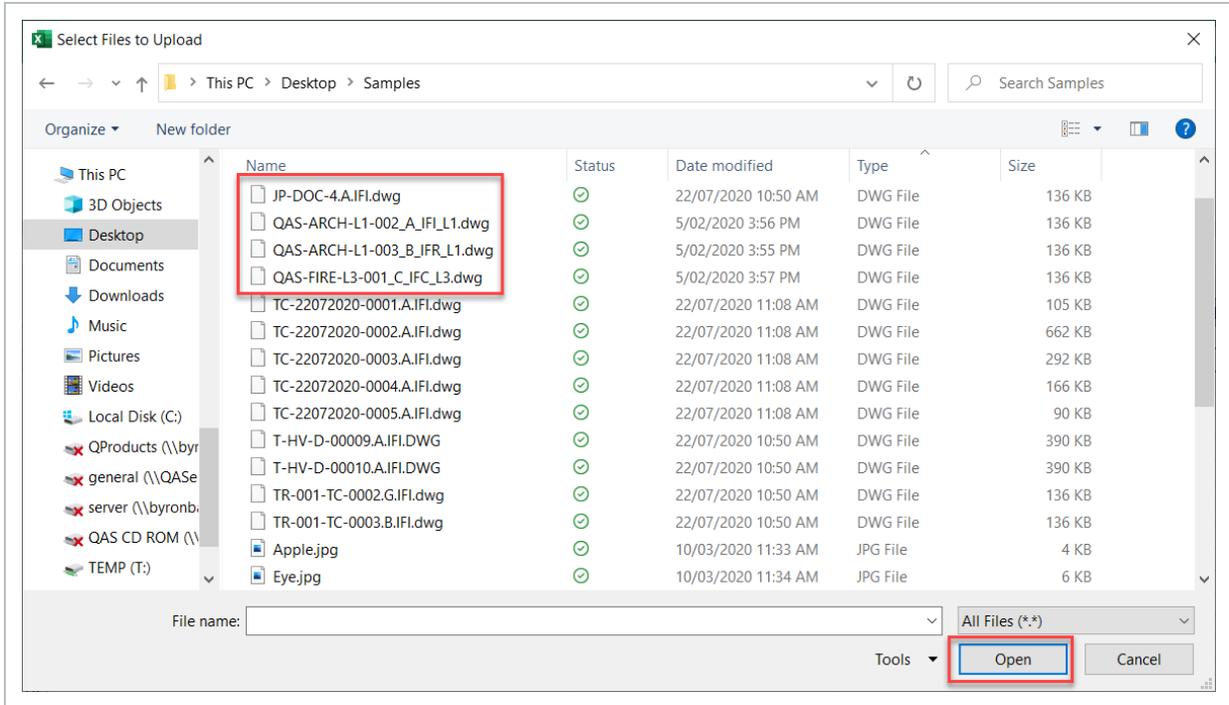
For information on Using XL Upload, see the links below.

3.1 UPLOADING NEW DOCUMENTS

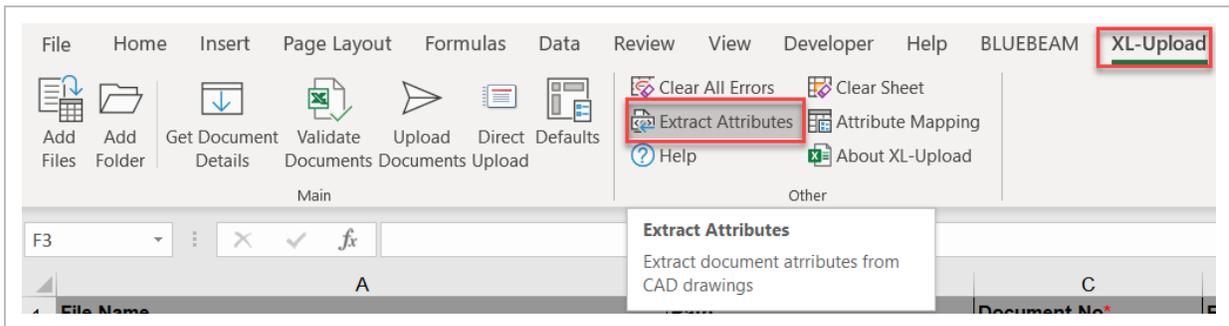
1. Open **XL-Upload** from the desktop.
2. From the XL-Upload menu, select **Defaults**, confirm these are correct and adjust as necessary.
3. Click **OK** then enter your User ID, Company ID and Password and **Login**.
4. From the XL-Upload menu select **Add Files**.



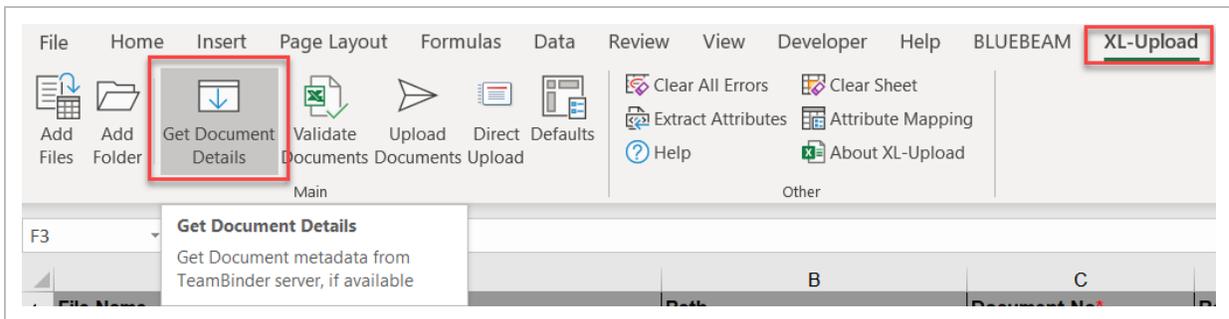
5. Navigate to the location on your computer where the files are saved.
6. Select the file(s) to upload and click **Open**.



7. Click **Extract Attributes** if you are using attribute extraction to extract the document details directly from Microsoft Word, Excel or Power Point files, PDF, or AutoCAD DWG files.
8. The Document No. can be populated either from the File name or from the attribute extraction process. If it is not populated correctly then manually enter the correct document number.



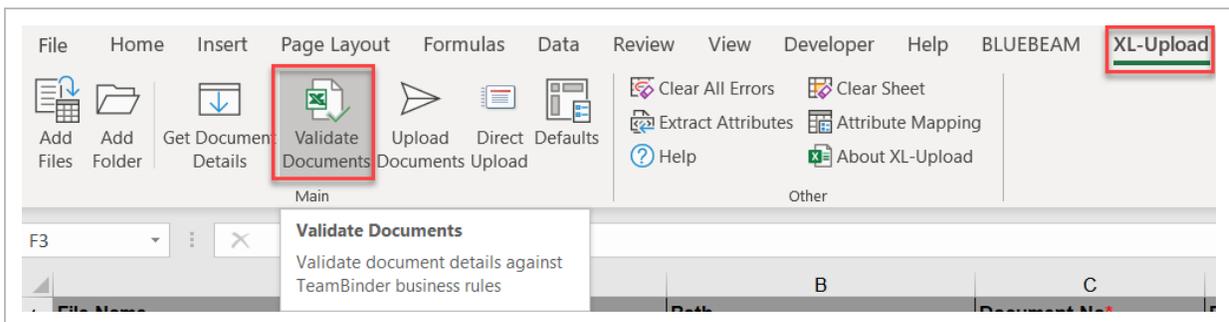
9. Use the **Get Document Details** from the XL-Upload menu to retrieve document metadata from either previously uploaded revisions in your project or to activate the drop-down options in the XL-Upload spread sheet.



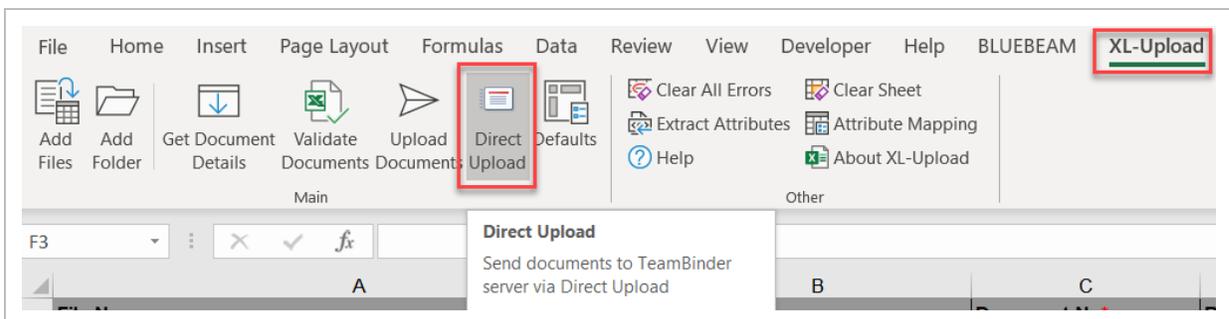
- Populate the remainder of the fields in the XL-Upload workbook with the details of the documents (i.e. Rev, Status, Category, Discipline and Title). These should match the fields that have been set up on the project. Repeat from the above to add/upload additional documents.

File Name	Path	Document No	Rev	Status	Title	Discipline	Category	Type
QAS-ARCH-L1-003_B_IFR_L1.dwg	C:\Users\tanya.coulter\OneDrive	QAS-ARCH-L1-003_B_IFR_L1	F	IFI	Site Plan Sheet 3 of 4	ARCH		DRAWING
QAS-ARCH-L1-002_A_IFL_L1.dwg	C:\Users\tanya.coulter\OneDrive	QAS-ARCH-L1-002_A_IFL_L1	A		Site Plan Sheet 2 of 4	ARCH		DRAWING
QAS-FIRE-L3-001_C_IFC_L3.dwg	C:\Users\tanya.coulter\OneDrive	QAS-FIRE-L3-001_C_IFC_L3	C		Site Plan Sheet 4 of 4	ARCH		DRAWING

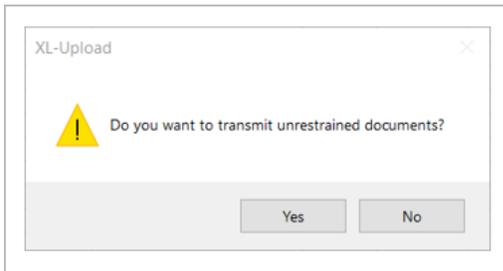
- Select **Validate Documents** from the XL-Upload menu to perform a validation check.



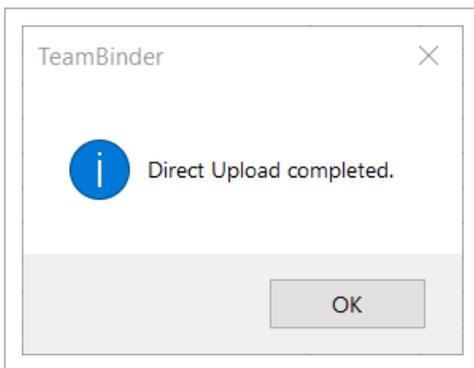
- Select **Direct Upload** on the XL-Upload menu.



13. You will receive a message asking if you wish to transmit the documents. Select Yes or No.



14. A confirmation message will be shown once the upload has completed.



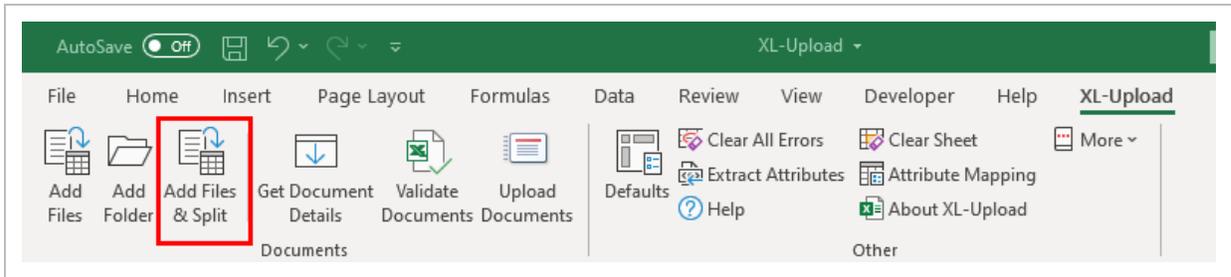
3.2 SPLITTING PDF FILES FOR UPLOAD

Projects sometimes receive a large volume of drawings as a single PDF. Often these drawings need to be tracked as individual documents within InEight. This leads to lost time in either sending them back to the contractor/designer to address this or splitting them out manually and uploading each individually.

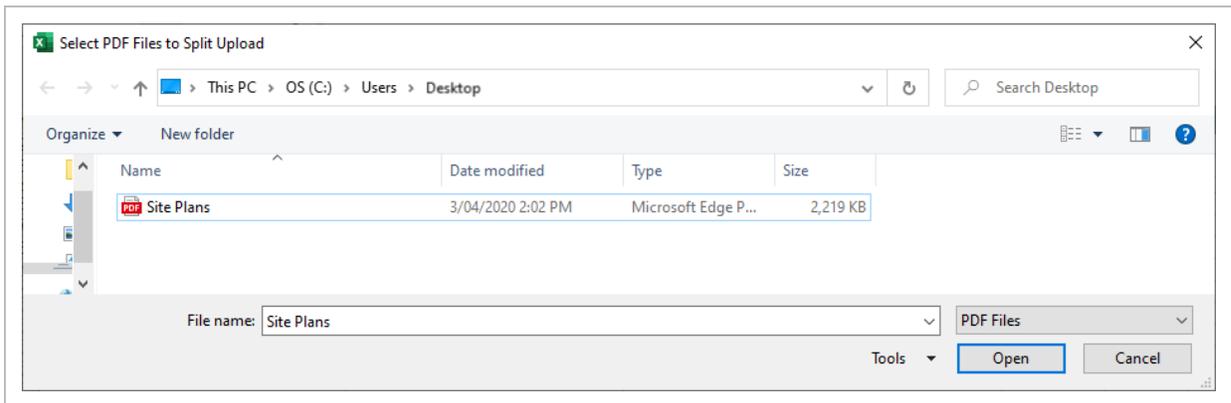
This new functionality within XL Upload allows users to select files to be split into individual sheets automatically.

To split a PDF file that contains multiple pages into individual files:

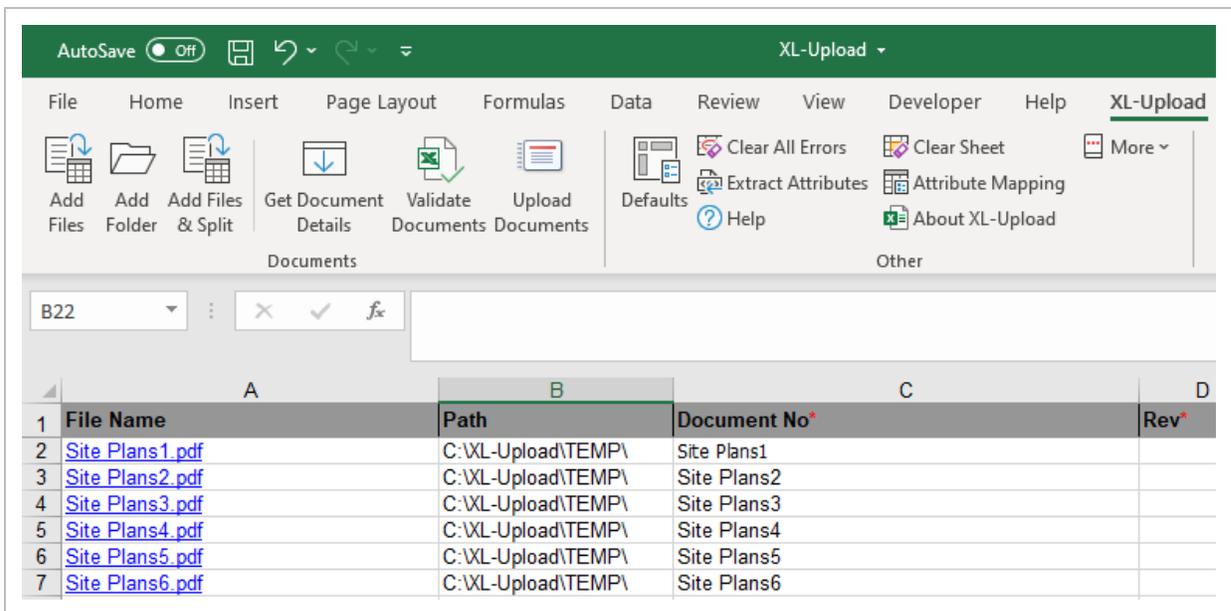
1. From the XL-Upload tab, click **Add files & Split**.



2. Navigate to the location on your computer where the files are saved.



3. Select a PDF file that contains multiple pages (which need to be separated) and click **Open**.
4. The PDF is then split into individual files with the page numbers appended at the end of each file name.



5. The documents can then be uploaded as normal. See: [Uploading New Documents](#).

3.3 DOCUMENT VALIDATION IN XL-UPLOAD

XL-Upload users can perform document validations directly from within the program. This allows users to check that their documents pass all necessary validations prior to uploading the documents.

To perform a document validation:

1. Open **XL-Upload** from the desktop.
2. Enter your User ID, Company ID and Password, click **Login**.
3. Populate the necessary details in the spreadsheet.
4. From the XL-Upload menu, select **Validate Documents**.
5. The system takes the information from the XL-Upload spread sheet and performs a number of validations based on the project set-up details.
6. If the documents pass all validations, the system returns a message saying that the documents have passed validation.
7. If the documents fail validation, the system returns a message saying that the documents have failed validation, and the documents failing and the missing fields are highlighted in red in XL-Upload.
8. Scroll to the right of the worksheet to view the Errors column next to the Remarks column in which XL-Upload notes the reasons why the documents have failed validation.
9. In the Document No. field, comments detail why the validation has failed. Move the mouse over this field (noted with a small red triangle in the corner) to see these comments.
10. After you have amended the issues, you must clear the errors before attempting again. To do this select **Clear All Errors** in the XL-Upload menu and then repeat the Validation process.

3.4 UPLOADING REVISED DOCUMENTS

A feature to assist in the process of uploading revised documents (new revisions) is available within XL-Upload.

Get Document Details can be used to retrieve document metadata from previously uploaded revisions, saving data entry time. Additionally, drop-down field data in the XL-Upload spread sheet will populate assisting in the accuracy of entering metadata codes.

NOTE

This feature can be used even when documents have not been uploaded previously. You will get an error message which says 'Document Not Available' indicating that it is not currently in the Document Register; however the drop-down field data will now be available to you.

1. Open **XL-Upload** from the desktop.
2. Enter your login details when prompted and click **Login**.
3. If necessary, select **Clear Sheet** from the XL-Upload menu to remove any existing entries.
4. Select **Add Files** from the XL-Upload menu.
5. Navigate to the file(s) location on your computer/network.
6. Select the file(s) to upload and click **Open**.
7. Enter/edit the Document numbers only for each document.
8. Select **Get Document Details** from the XL-Upload menu.
9. A search for the document number/s entered will be conducted in InEight Document. Once found, the existing attributes for the last uploaded revision of that document number will be displayed.
10. Update the revision and/or status of the documents as required.
11. Select **Validate Documents**, then **Upload Documents** from the XL-Upload menu.

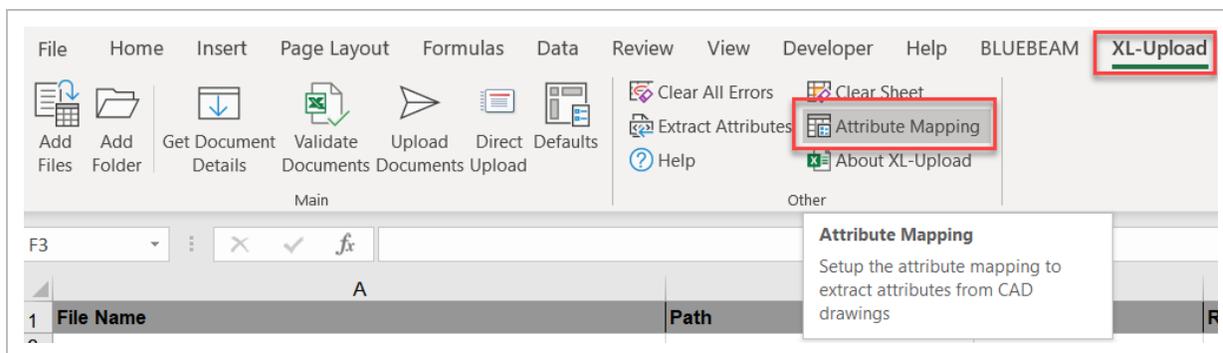
3.5 ATTRIBUTE EXTRACTION

XL-Upload can extract the document attributes from Microsoft Office (Word, Excel and PowerPoint) files and PDF files in addition to AutoCAD DWG files. To use this feature, the attribute mapping needs to be set up in XL-Upload. The attribute mapping will map the fields on the attribute block to the fields.

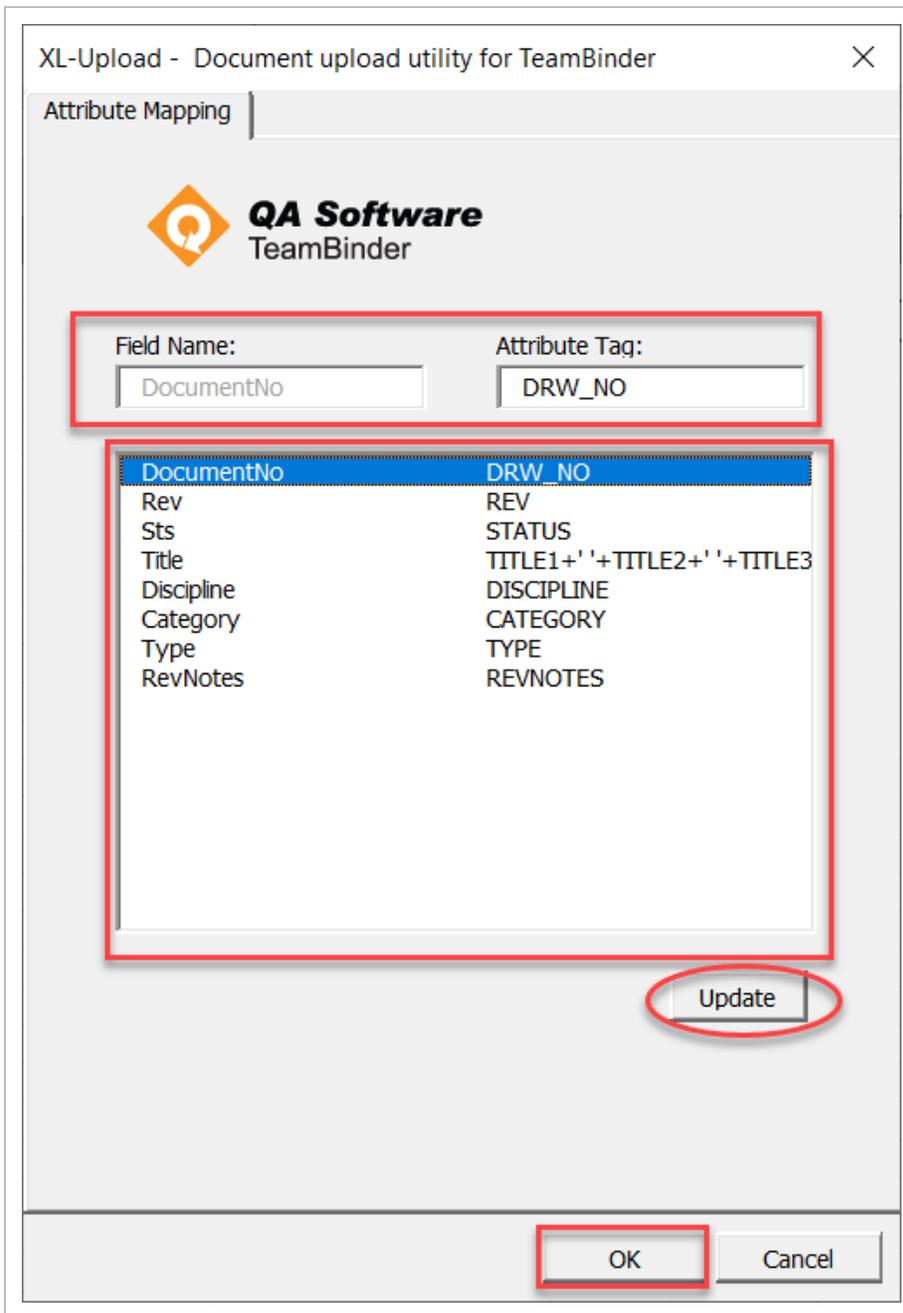
3.5.1 AutoCAD Attribute Mapping

To set up attribute mapping for DWG files:

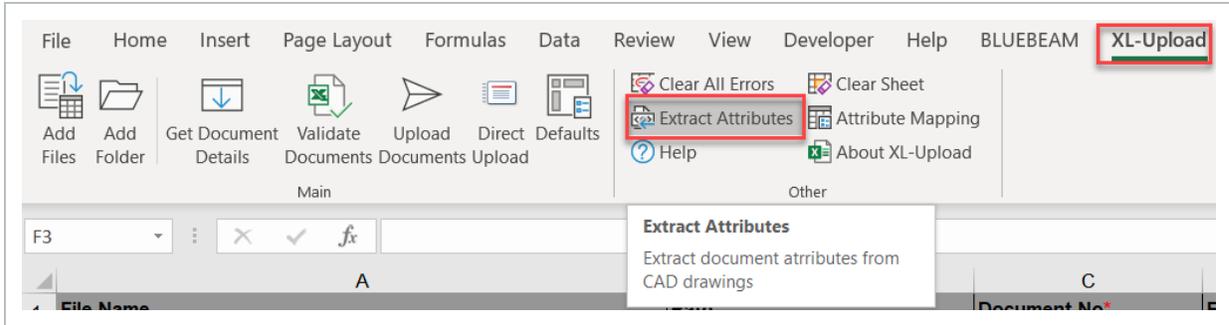
1. Open **XL-Upload** from the desktop.
2. Select **Attribute Mapping** from the XL-Upload menu.



3. Click the field name that you wish to map.
4. Enter AutoCAD Attribute values in the text box corresponding to the field name in the CAD title block for eg. DocumentNo Field name correlates to DRW_NO in the CAD title block.



5. Click **Update** after each entry, once completed select **OK**.
6. Add files to XL-Upload Spreadsheet then select **Extract Attributes**.



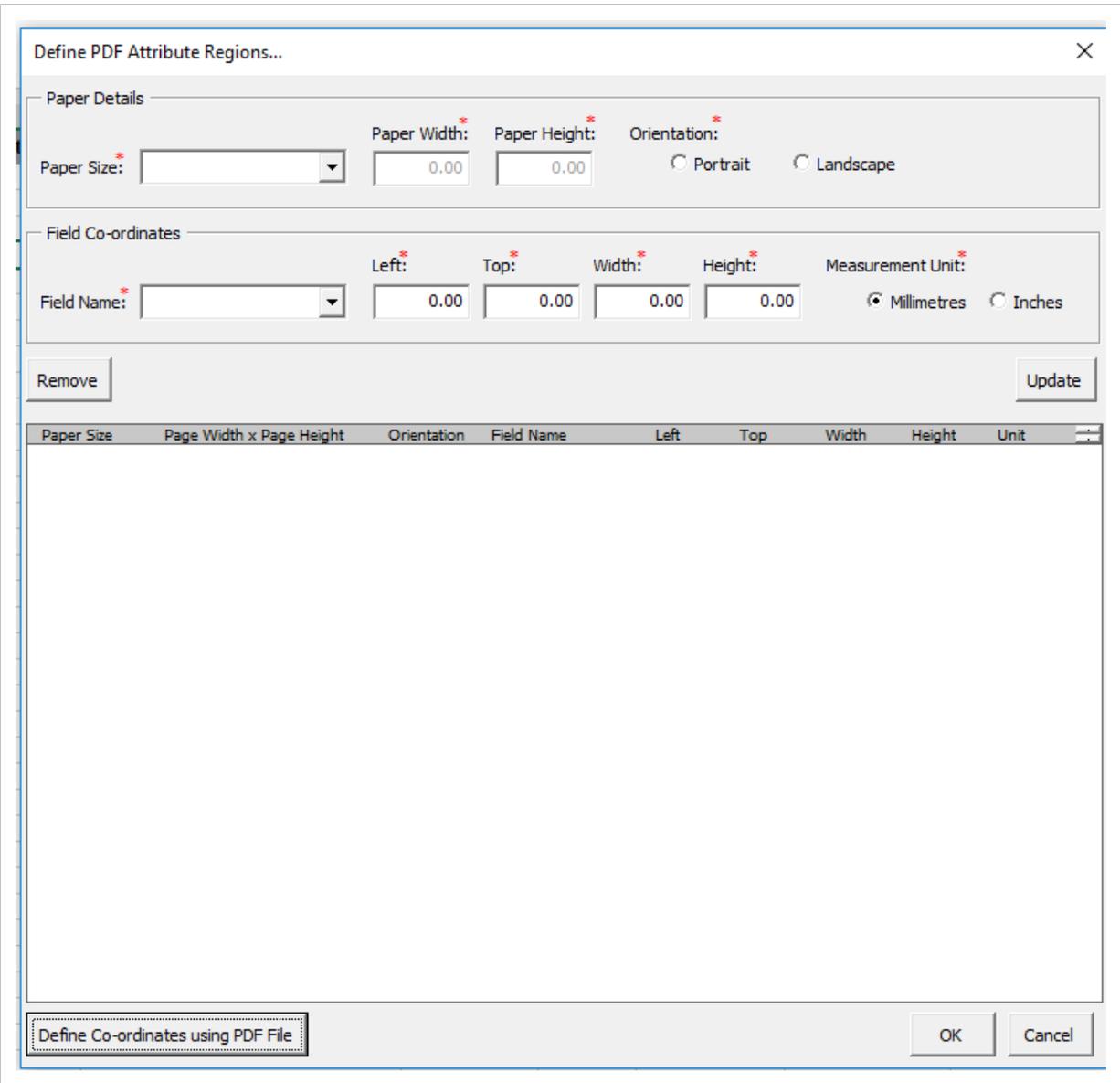
7. Based off the attributes mapped data will be populated in XL-Upload.

3.5.2 PDF Attribute Mapping

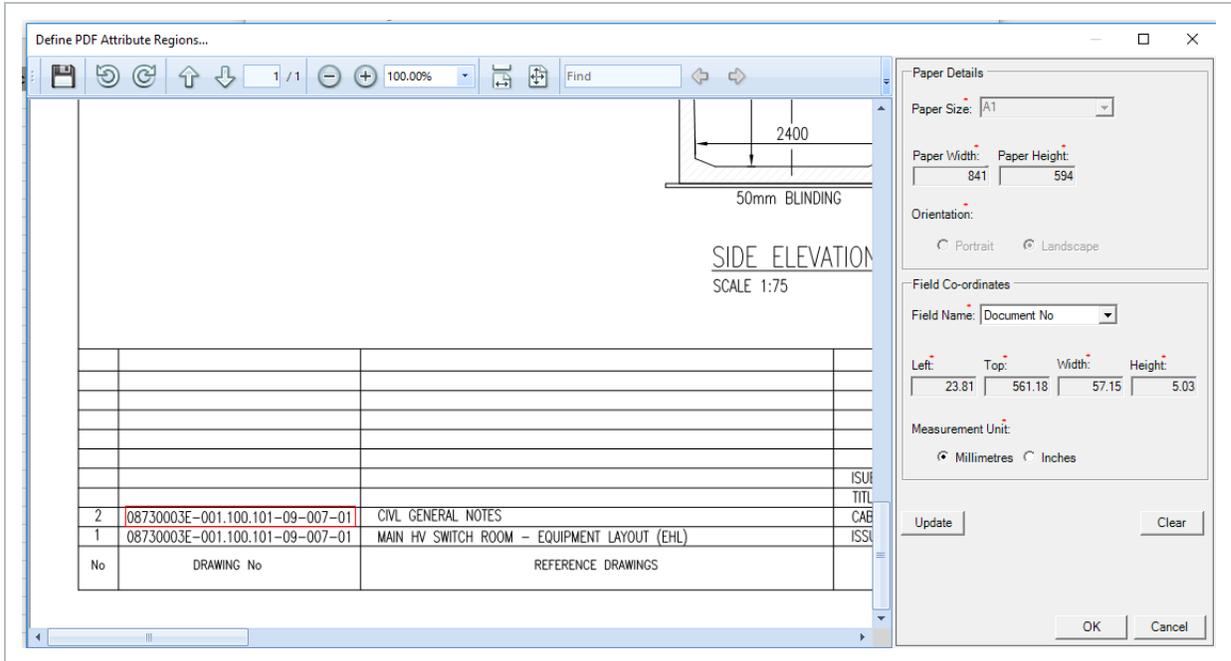
If you have a number of PDF files that have document attributes such as Document No, Title, Rev etc. in a consistent location (E.g. based off the same title block), you can now use XL-Upload to read these attributes directly from the PDF files.

To extract the attributes:

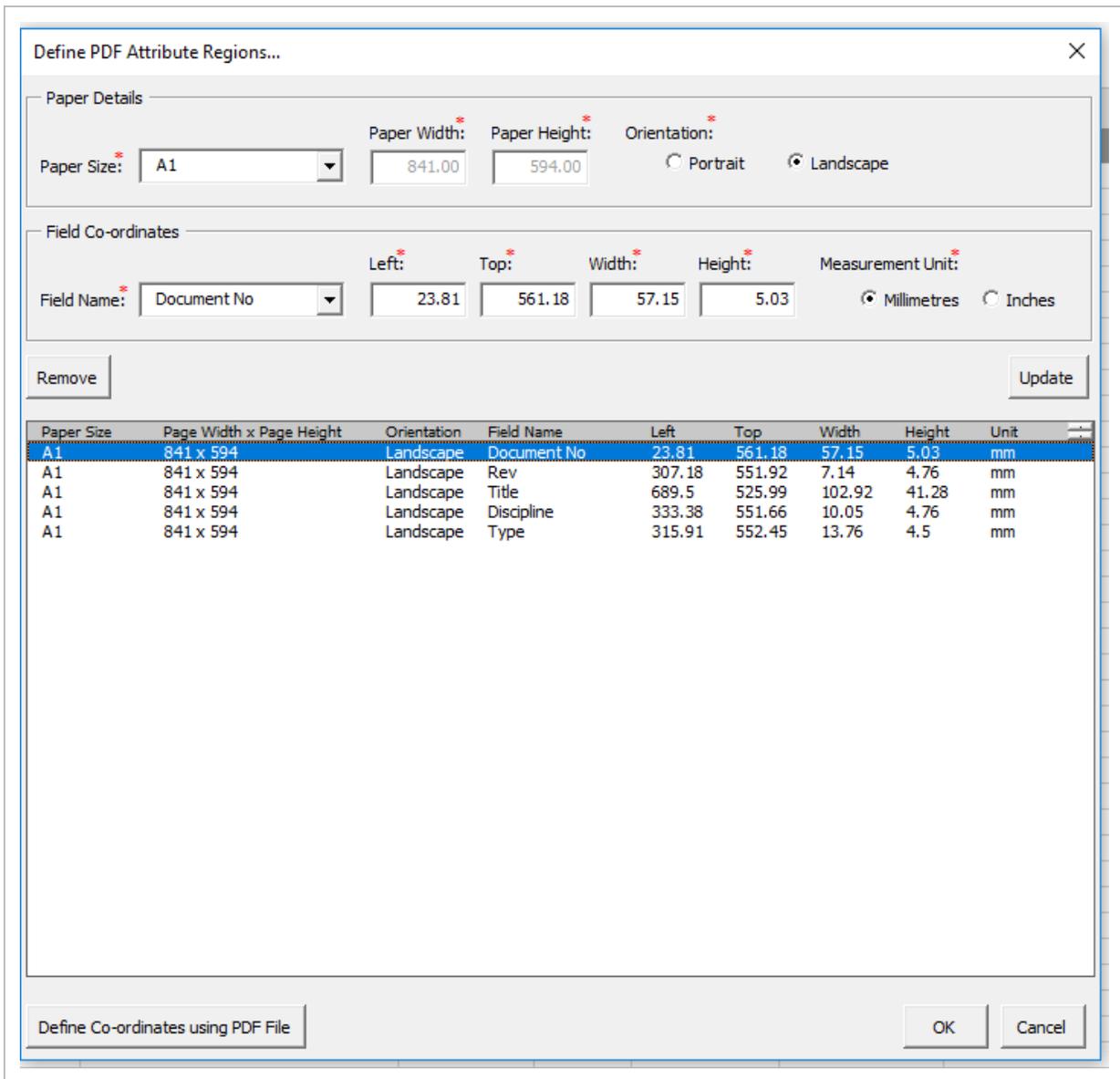
1. Open **XL-Upload** from the desktop.
2. From the XL-Upload menu, select **Defaults**.
3. Set the Attribute Extraction method for PDF files to **PDF Text Extraction**, select **OK**.
4. From the XL-Upload menu, select **More, Define PDF Attribute Regions**.
5. List the coordinates from which the attributes need to be extracted for each field and paper size. This can be defined directly using a sample file.
6. Select **Define Co-ordinates using PDF file** and open one of the PDF files.



7. Draw a rectangle to mark the **Field Names**. Update for each Field Name until completed.



- 8. Select **OK**.
- 9. All Attributes marked will now be listed, select **OK**.



10. From the XL-Upload menu add the pdf files and then **Extract Attributes**.

11. From the attributes mapped data will be populated in XL-Upload.

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CHAPTER 4 – ADDITIONAL XL-UPLOAD OPTIONS

For information on Additional XL-Upload Options, see the links below.

4.1 MORE XL-UPLOAD OPTIONS

Upload Documents: Documents will be sent to your email outbox before they are uploaded to the project's Document Register.

Mark Title as Changed: When revising documents, if the titles are changed, this needs to be manually denoted by adding ** at the end of the new title. In XL-Upload this can be automated, by selecting the rows that have the titles to be changed and selecting **More**, then **Mark Title as Changed**. The Rev also needs to be updated for this action to be validated.

List Attributes: Lists attributes against selected document such as Date, Discipline, Revision

User Profiles: If you are working on multiple projects which may have different User ID, Company ID or Email address, you can now define all of them under the more button and User Profiles which will allow you to switch between them as required.

Define PDF Attributes Regions: The coordinates attributes need to be extracted for each field and for each paper size. This can be defined directly by clicking on "Define Co-ordinates using PDF file" and drawing a rectangle to mark the co-ordinates.

4.2 XL-UPLOAD RESTRICTIONS

An XL-Upload spread sheet can be saved at any time to ensure information is not lost. It is important that when doing so, you select **Save As** from the **File** option of the Menu Bar to not overwrite the original file. Provided the spread sheet you are saving is located in the same folder as the original installation location, XL-Upload will work as normal.

4.3 ADDITIONAL XL-UPLOAD INFORMATION

For more information on XL-Upload or for contact details select **About XL-Upload** from the XL-Upload menu. The About screen shows the support phone number that is specific to your project/region.

Alternatively contact support@ineight.com.