
MAIL USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT 

Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

Copyright ©2020 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

Microsoft Windows, Internet Explorer and Microsoft Excel are registered trademarks of Microsoft Corporation.

Although InEight Document has undergone extensive testing, InEight makes no warranty or representation, either express or implied, with respect to this software or documentation, its quality, performance, merchantability, or fitness for purpose. As a result, this software and documentation are licensed “as is”, and you, the licensee are assuming the entire risk as to its quality and performance. In no event will InEight be liable for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation.

Release 19.7

Revision: 5

Last Updated: 20 January 2020



CONTENTS

CHAPTER 1 — INTRODUCTION TO MAIL	5
1.1 Overview	5
1.2 InEight Mail Process	6
CHAPTER 2 — OUTGOING MAIL	7
2.1 Creating and Sending Mail	7
2.2 Adding Contacts on the Fly	11
2.3 Using Contact Groups	14
2.4 Drafts	15
2.5 Duplicating Mail	18
2.6 Conducting Mail Reviews	18
CHAPTER 3 — READING AND RESPONDING TO MAIL	23
CHAPTER 4 — PROCESSING UNREGISTERED MAIL	27
CHAPTER 5 — LOCATING MAIL	33
5.1 Simple Search Options	33
5.2 Advanced Mail Search	34
5.3 Thread View	36
5.4 Mail Folders	38
CHAPTER 6 — MANAGING MAIL	45
6.1 Manually Linking Mail	45
6.2 Mail Status	48
6.2.1 Changing Mail Status	48
6.3 Exporting mail to HTML or PDF	50
6.4 Deleting Mail	51
6.5 Processing Mail Attachments as Controlled Documents	53

6.6 Cancelling Mail	55
6.7 Forwarding Mails in Bulk	57
6.8 Mail Favorites	59

CHAPTER 1 – INTRODUCTION TO MAIL

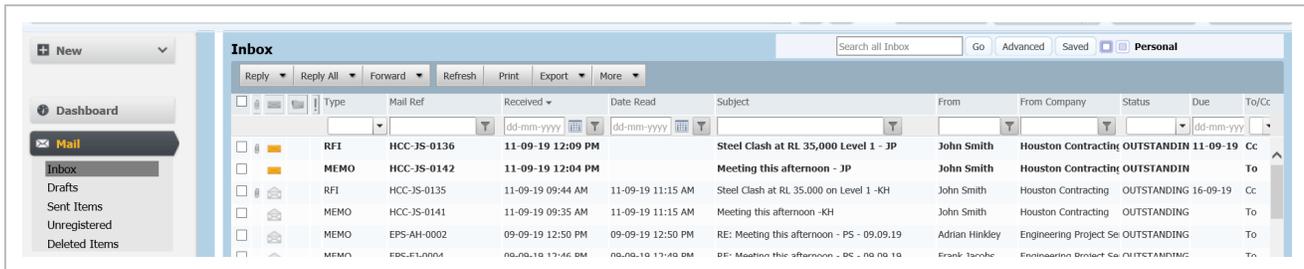
1.1 Overview	5
1.2 InEight Mail Process	6

1.1 OVERVIEW

The InEight Document (DOC) Mail module can control and streamline the process of sending and receiving mail and communications between project participants.

The mail module includes an Inbox, Sent Mail, Drafts, Deleted items and Unregistered Mail. If you have access to these mailboxes, they can be found by selecting Mail from the left menu.

Clicking on a mailbox opens the register view.



Mail can be sorted by clicking on column headers or using the column filters. You can also search for mail using the Quick Search box above the register or by clicking **Advanced**.

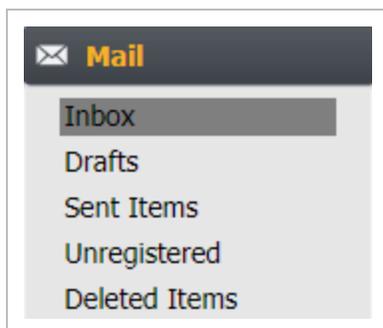
Double click to open, read and respond to mail.

Use the check boxes on the left-hand side to select mail and then perform actions using the options above the register such as **Reply**, **Reply All** or **More>Download Attachments**.

1.2 INEIGHT MAIL PROCESS

The typical process for sending and receiving InEight mail is:

1. Users create and send outgoing mail using the InEight Document (DOC) Mail module.



2. Recipients using InEight DOC, receive a notification via their corporate email system with a hyperlink to the mail within DOC.
3. Recipients who are registered as External Contacts in DOC (ie no login access) receive a copy of the mail itself.
4. InEight users read and respond (reply/forward) to received mails from within DOC.
5. External Contacts reply by Email. This mail comes back to the sender via the DOC Unregistered mail folder.

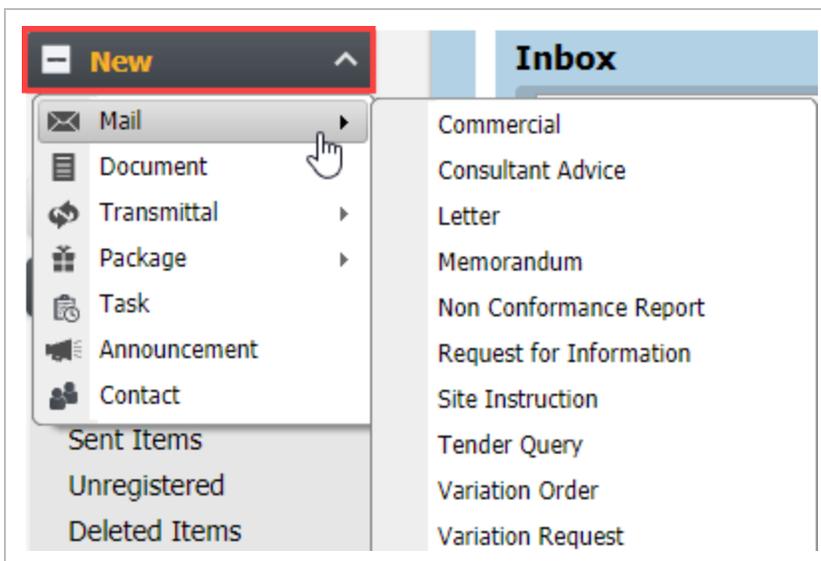
CHAPTER 2 – OUTGOING MAIL

2.1 Creating and Sending Mail	7
2.2 Adding Contacts on the Fly	11
2.3 Using Contact Groups	14
2.4 Drafts	15
2.5 Duplicating Mail	18
2.6 Conducting Mail Reviews	18

2.1 CREATING AND SENDING MAIL

To create InEight Mail:

1. Click the **New** button in the top left of the screen then **Mail**.



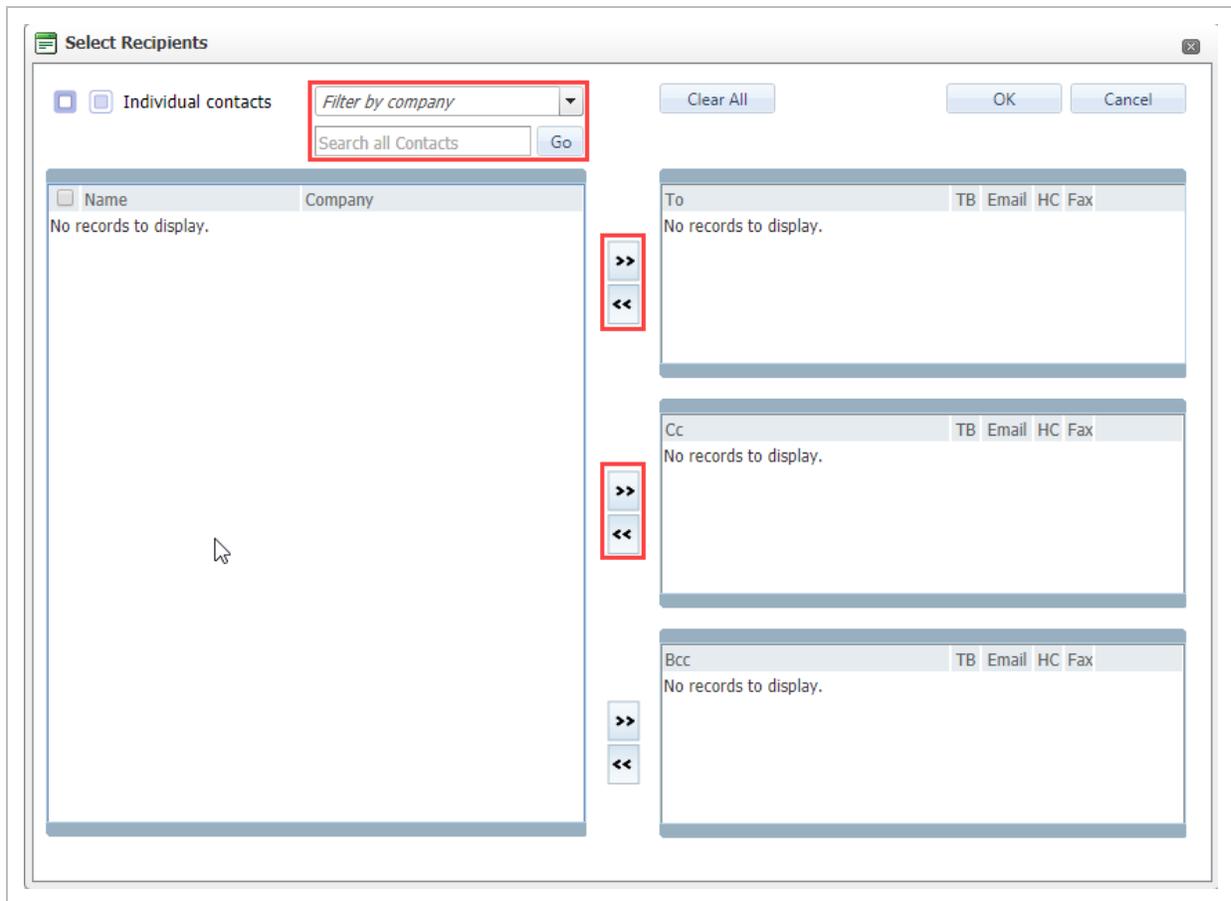
2. Select the appropriate mail type. The list of mail types available depends on the sender's access

permissions. This opens a new window.

3. To add recipients, choose one of the following options:

- Enter the recipient(s) name or the title of pre-set Contact Group(s) in the “To” and “CC” fields as appropriate.

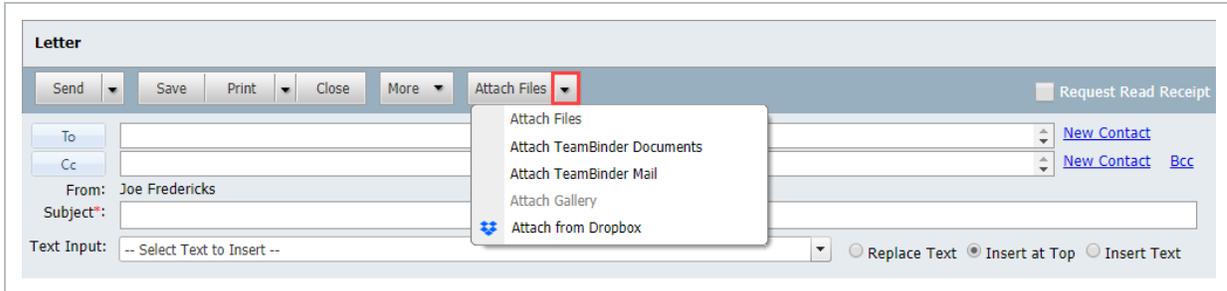
- Click the **To** button to open the address book in a separate window. Here you can use the quick search box, filter by company or filter by Contact groups to add recipients. Once contact(s) are listed, double click or tick and select the arrows to move them into the **TO** or **CC** fields on the right, then click **OK**.



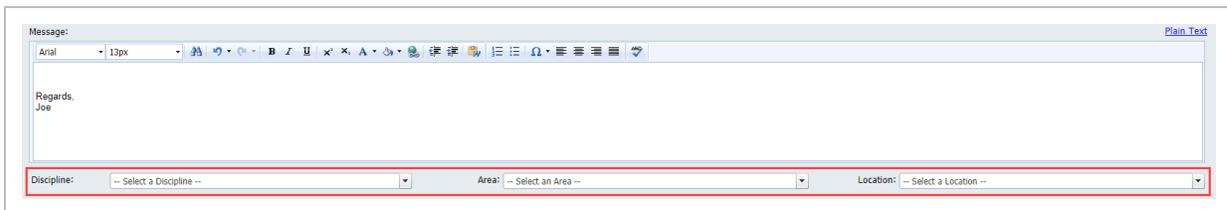
4. Type (or select using the date picker) a **Response required by** date if required.
5. Select a **Priority** if needed. This may have an impact on how the user is notified about this mail.
6. Change the default **Status** if relevant.

Response required by: Priority: Status:

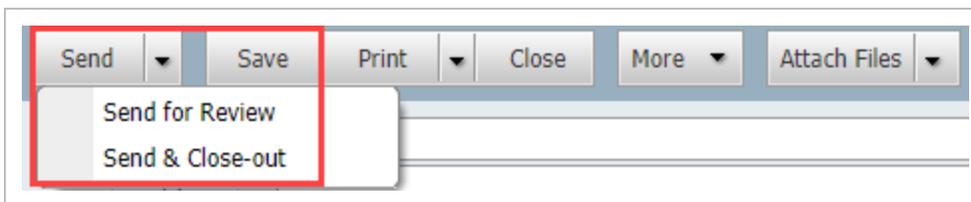
7. Tick **Request Read Receipt** if required.
8. To add attachments, drag and drop them into the message window or select the arrow next to the **Attach Files** button at the top of the mail and choose the appropriate option. (Attach Files refers to files stored locally on your machine).



9. To classify mail further (for example by Discipline, Area and Location), select the relevant drop-down lists below the message. Depending on your project, some of these fields may be mandatory.



10. To save the mail as a draft, click **Save**.
11. To send for review, or to send and close out, click the arrow next to the Send button.
12. To send the mail, click **Send**.



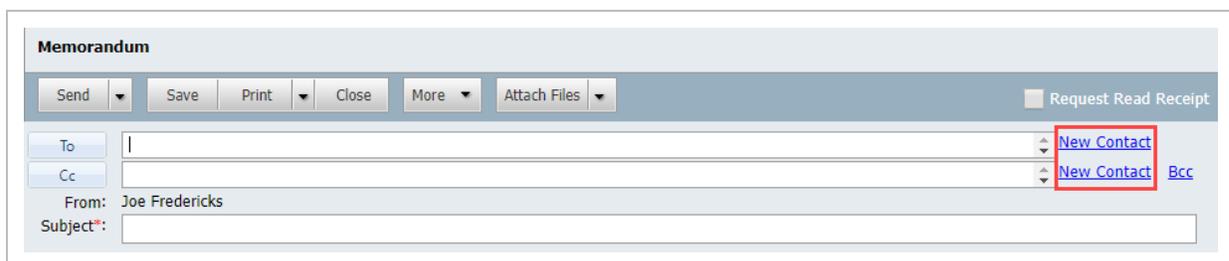
NOTE

- If you require a contact to be added to the address book, contact the Project Administrator or your Company Administrator.
- To use a **Custom Footer** with your mail, scroll to the bottom of the mail form to the section labelled Footer and select the Custom Footer that you wish to use. If a custom footer is selected the text can be edited on a per mail basis.
- Use the **Action note** and / or **Response** fields to make any internal notes about the mail item being created. These fields are not visible to the recipients of the mail item.
- Insert predefined strings of text using **Text Inputs** which can be defined by Project Administrators.
- Select **Print Preview** from the Print button drop down list to preview before sending. The mail will be displayed with a DRAFT Header as it has not been sent.
- File mail in a folder as it is being generated using the **More** button.
- Attach a PDF or HTML copy of the mail by ticking the relevant option at the bottom of the mail form.

2.2 ADDING CONTACTS ON THE FLY

Based on user permissions for your project, it may be possible to create new companies and contacts while composing mail from within the mail creation screen.

1. Click **New Contact** to the right of the To: or Cc: fields to load the “Create New Contact” window.



The screenshot shows a 'Memorandum' form with a header bar containing buttons for 'Send', 'Save', 'Print', 'Close', 'More', and 'Attach Files', along with a 'Request Read Receipt' checkbox. Below the header are the 'To' and 'Cc' fields, each with a 'New Contact' link to its right. The 'From' field is pre-filled with 'Joe Fredericks' and the 'Subject' field is empty. The 'New Contact' links are highlighted with a red rectangular box.

2. Select the Company the new contact belongs to.

TRAINING501 - Create New Contact

Company: -- Select a company first --

First Name*: Last Name*:

Contact ID*:

Title: -- Select a Title --

Phone: Mobile:

Fax:

Email*: Test

External Contact Preferred Send Method: Email

OK Cancel

3. If the new contact belongs to a new company, click the yellow plus sign  to the right of the company drop down list then enter a **Company ID**, **Company Name** and complete the other company details as required and click the **Close** button and **Save** when prompted and then

proceed to add the **Contact**.

4. Enter the First and Last Name of the new contact and press **Tab**. The ID of the new contact will default automatically (but can be changed).
5. Complete the remaining details about the new contact and click **OK** when done.

NOTE

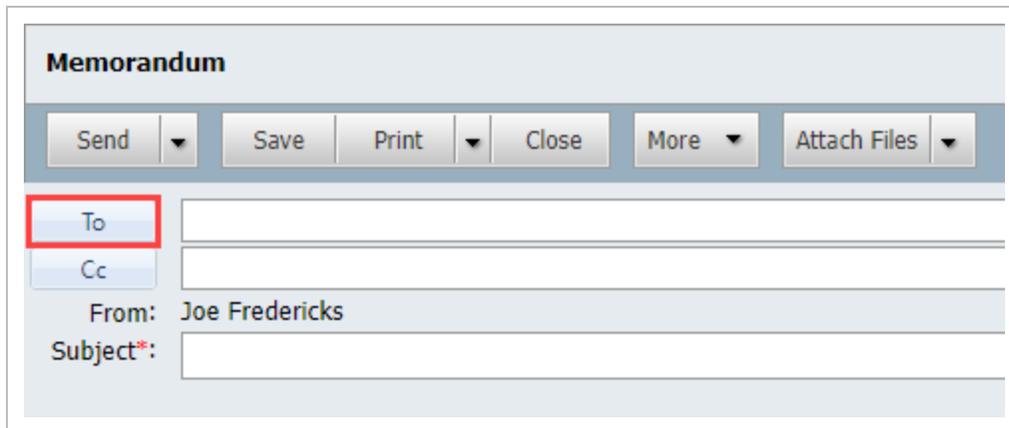
When entering new Companies, the system will check both the Company ID and Company name to see if they already exist.

2.3 USING CONTACT GROUPS

A Contact Group is a predefined list of contacts that can be used as a standard distribution when creating outgoing mail. Contact Groups are setup via the project Address book using the **More** button.

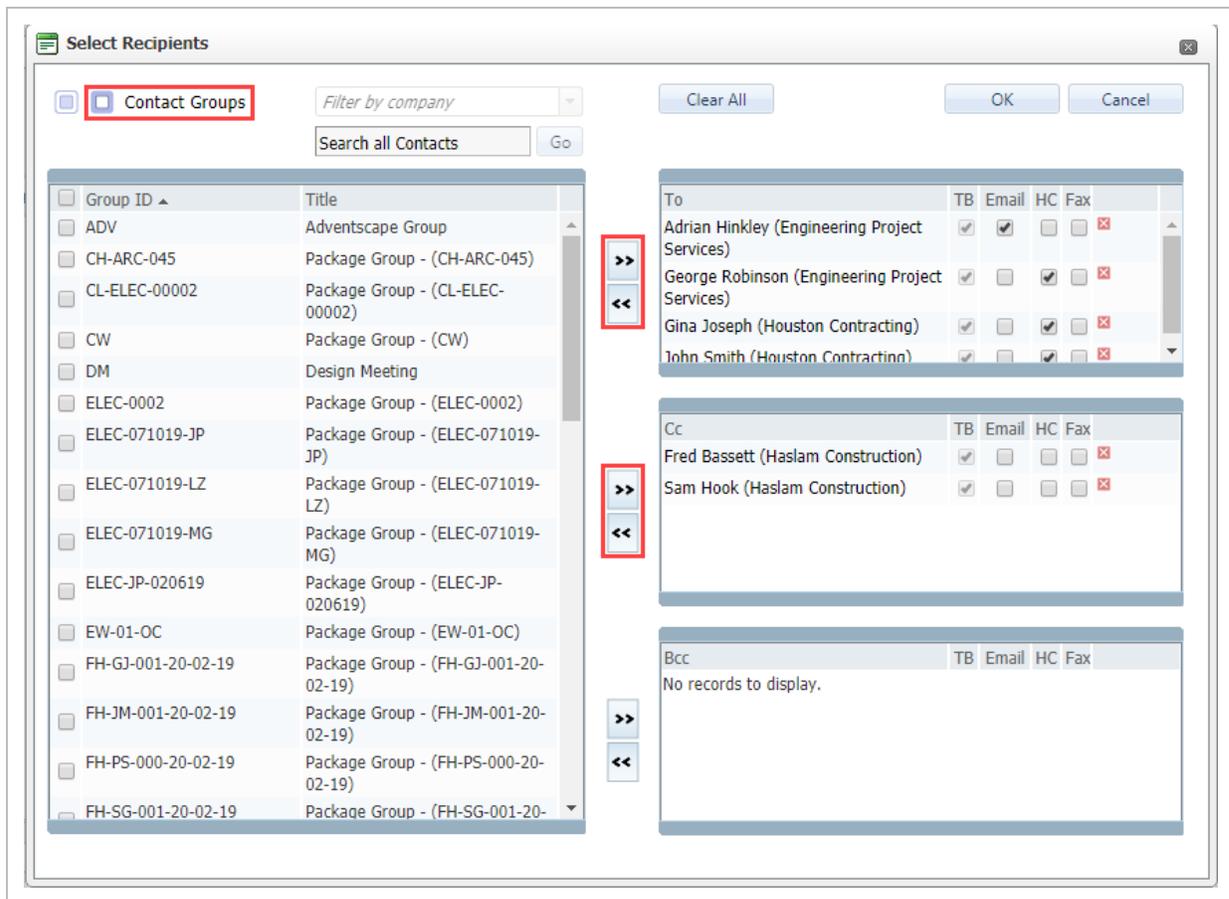
To use Contact Groups when creating outgoing mail:

1. Select **To**. This opens the “Select Recipients” window, then click **Contact Groups**. A list of available Contact groups will be displayed in the grid.



The image shows a screenshot of a "Memorandum" form. At the top, the title "Memorandum" is displayed. Below the title is a toolbar with buttons for "Send", "Save", "Print", "Close", "More", and "Attach Files". The "To" field is highlighted with a red box. Below the "To" field are the "Cc" field, the "From:" field (containing "Joe Fredericks"), and the "Subject*:" field.

- Click on your contact group from the left of the screen.



- The values for TO, and CC will be populated based on the contents of, and settings for the Contact Group.

NOTE

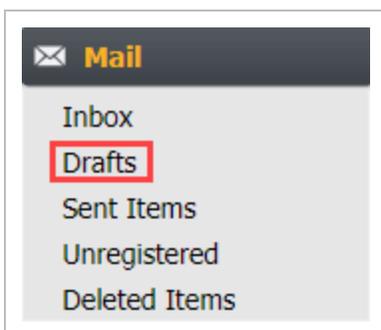
- Contacts within a Contact Group can be pre-defined as TO or CC values or a single section if the Contact Group was setup with **None** as a Distribution.
- To modify the distribution for an outgoing mail after selecting it via a Contact Group, use the standard arrow buttons to remove or add additional contacts.
- You can add Contact Groups to a mail item using the To or CC fields. Just start entering the Contact Group name and use the auto complete feature.

2.4 DRAFTS

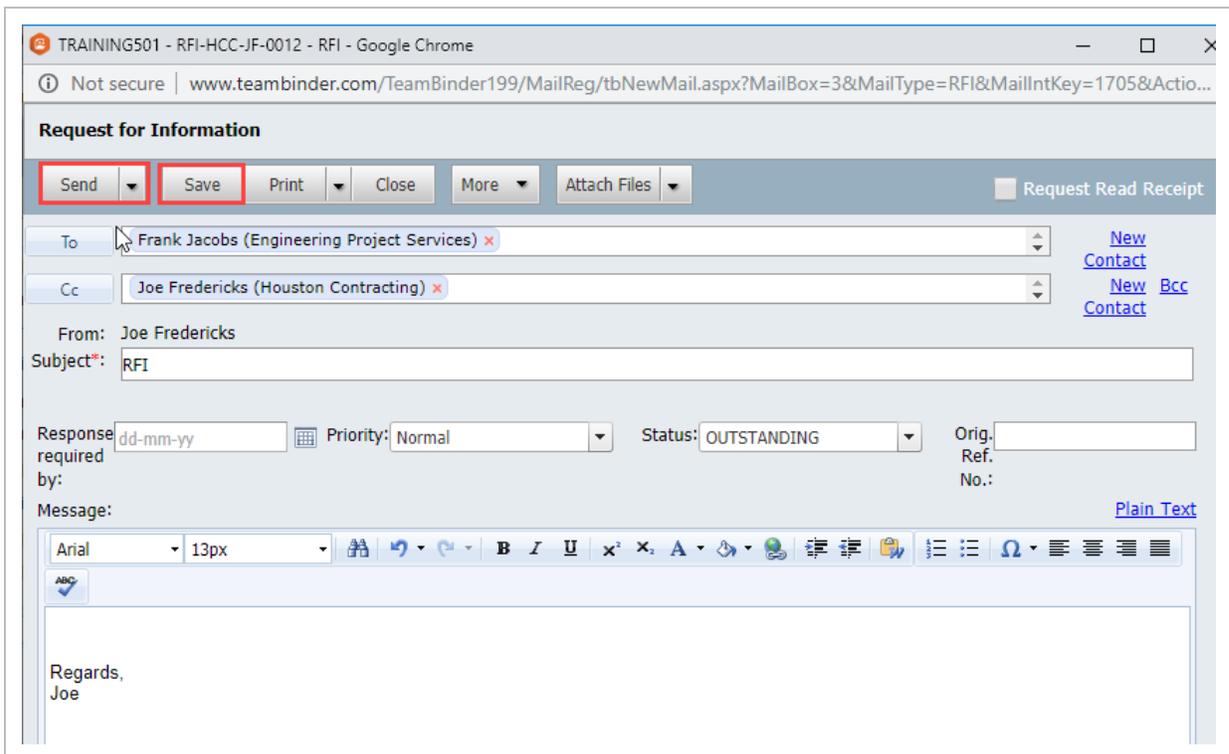
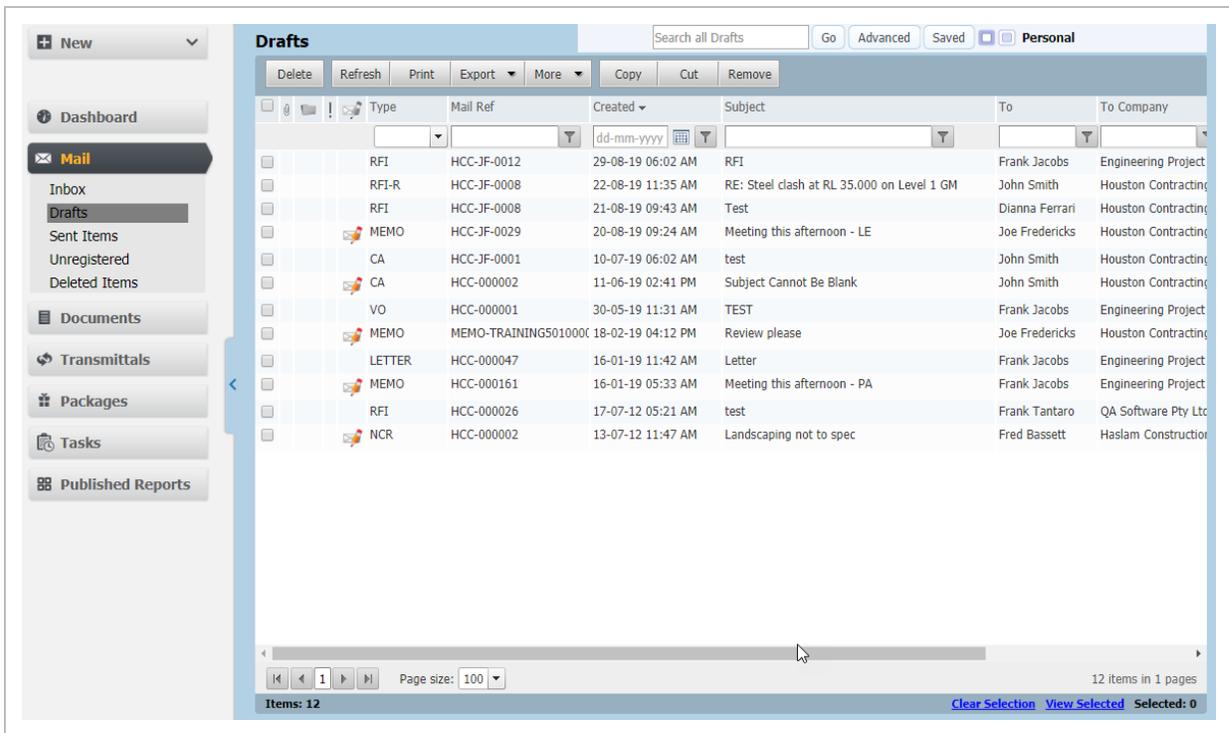
The Drafts mailbox stores outgoing mail that has been created and saved but not Sent. Mail in the Drafts mailbox is stored there permanently until either Sent or Deleted.

To access and send drafts:

1. From the left menu, click **Mail** and **Drafts**.



2. To open a mail for further editing, double click on it and edit as normal. When finished either **Save** (the mail will remain in the Drafts) or use the **Send** button from within the mail form.

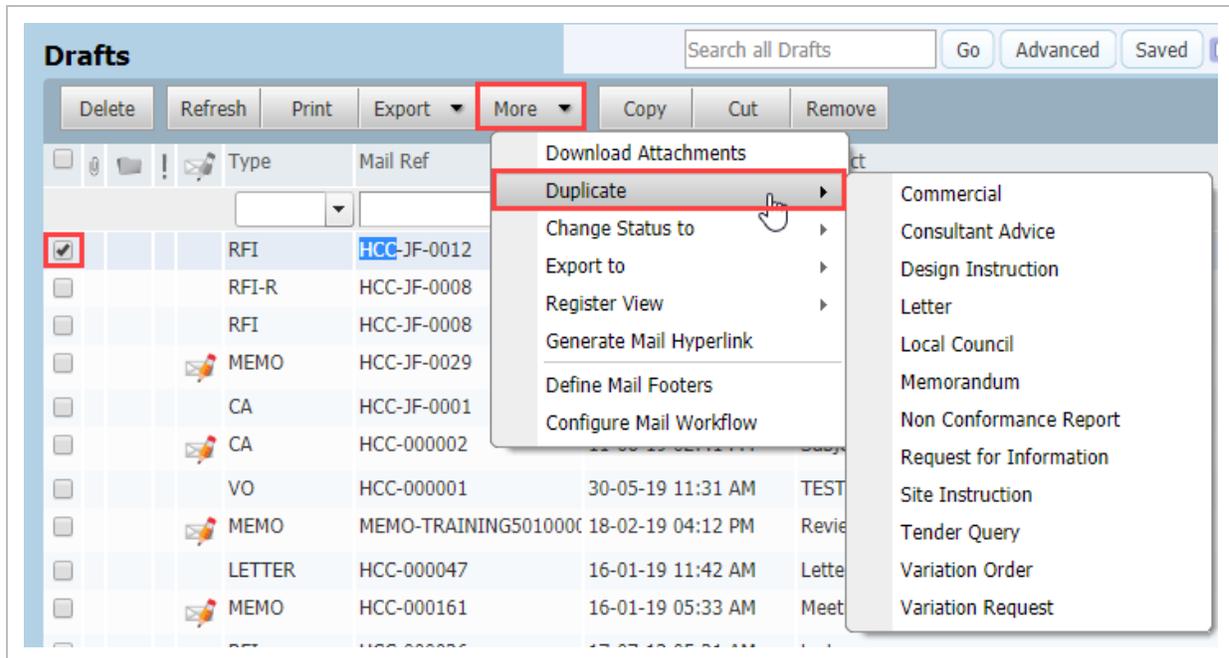


NOTE Printed drafts are stamped as DRAFT by the system automatically.

2.5 DUPLICATING MAIL

Use the Duplicate option to create new mail that has similar recipients, subject and/or message details to an existing item of mail. To use the duplicate function:

1. In any of the Drafts, Sent Items, or Inbox mail boxes, select the mail to be duplicated.
2. Click **More**, then **Duplicate**.



3. From the drop-down list, select the correspondence type for your new mail.
4. The mail form will now open with all details populated based on the mail being duplicated which includes any fields that can be matched from the source template.
5. Edit as required and send as normal.

2.6 CONDUCTING MAIL REVIEWS

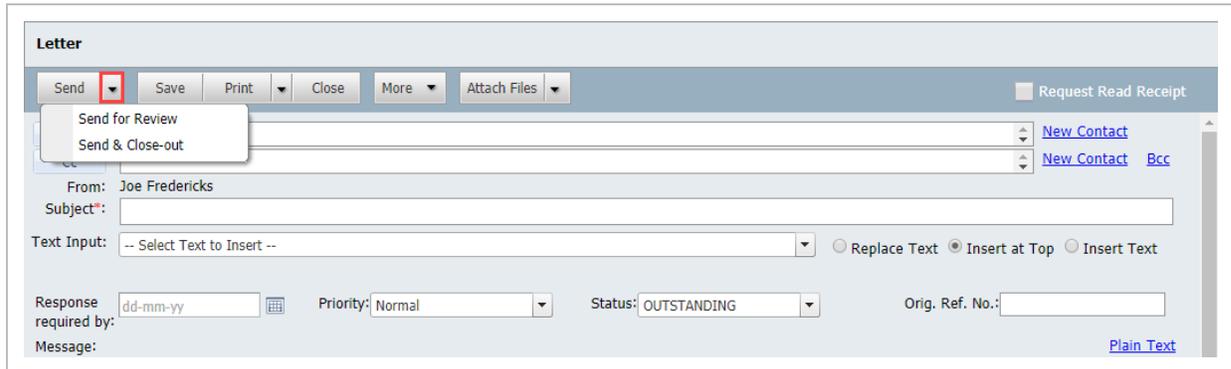
On some projects, certain types of correspondence must be reviewed by one or more people prior to being sent. This is managed in InEight Document using the **Send for Review** option rather than the **Send** option when generating mail.

Mail sent for Review can be:

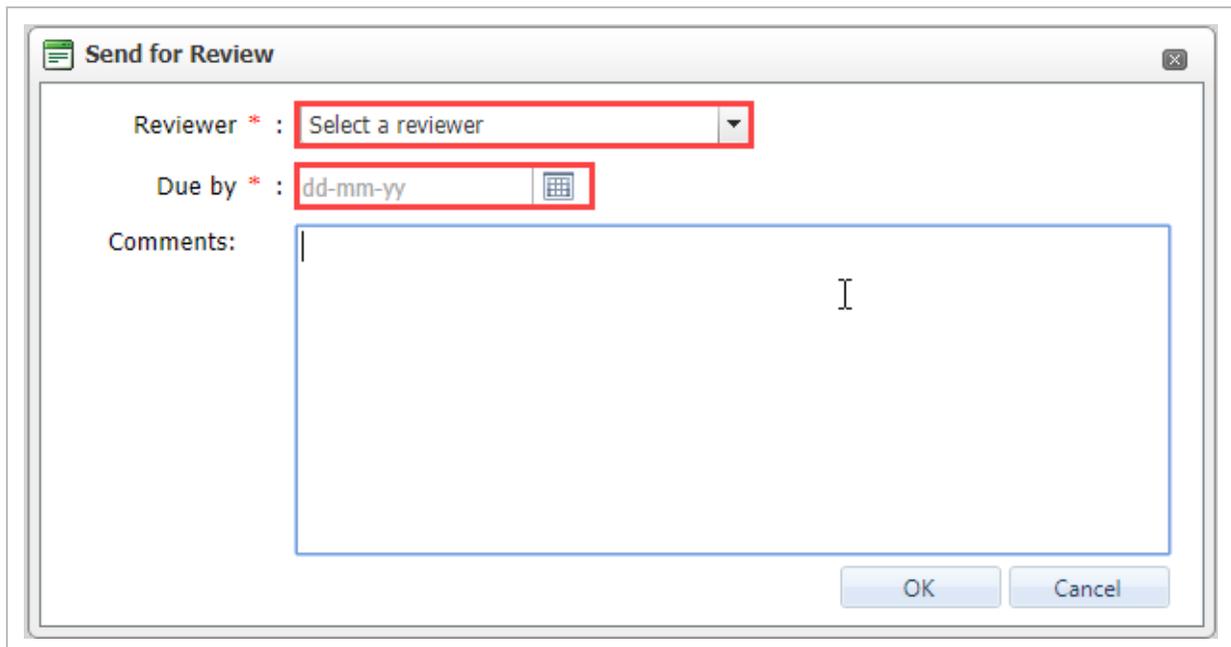
- Reviewed and returned to the originator for sending.
- Reviewed and sent on to the intended final recipient(s).
- Kept as a draft and sent to another internal user for review.

To send mail for review:

1. Click the arrow next to the **Send** button and select **Send for Review**.

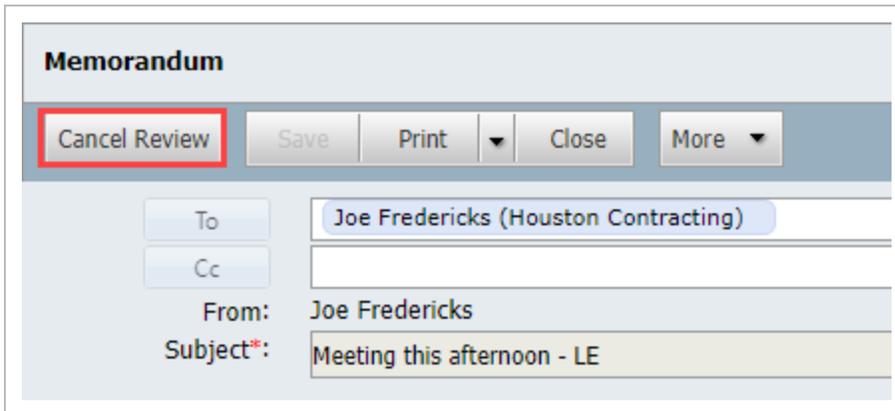


2. At the **Mail for Review** window, select the required reviewer, enter a **due by** date and any comments and click **OK**.

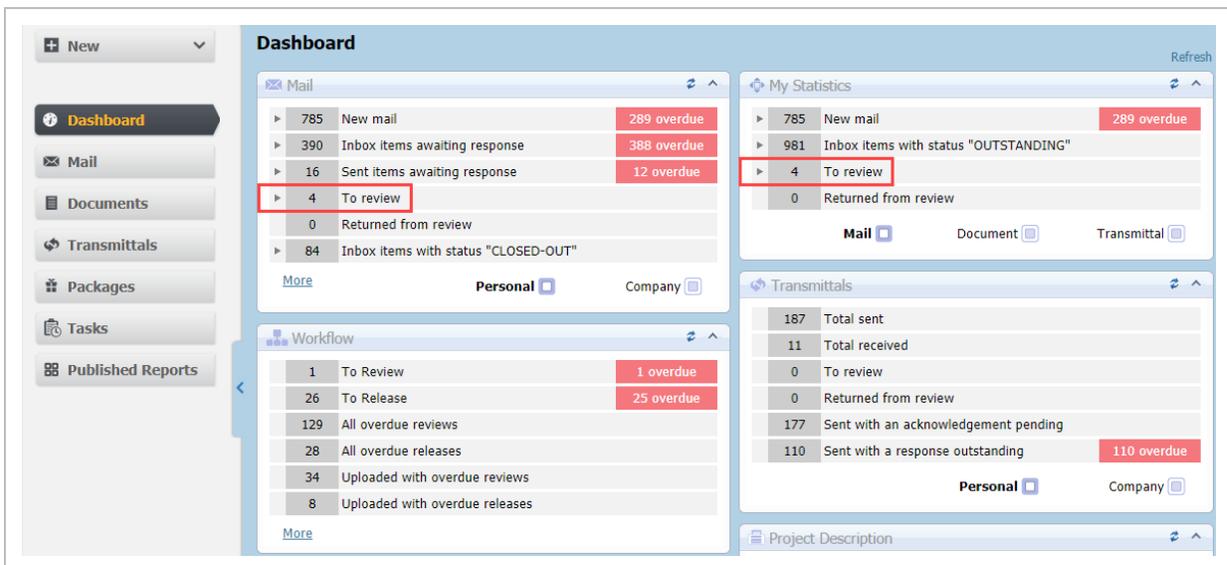


3. An email notification is automatically sent to the reviewer and the mail is listed in the Drafts of the reviewer and originator until sent. The originator cannot send the mail while under review,

however they can open the draft and select **Cancel Review** at any time if required.



- The reviewer is notified by email that they have a draft for review. They can access it via the email hyperlink, Drafts mailbox or via the dashboard **To Review** links found within the My Statistics or Mail widgets.



- When the mail under review is opened a "Mail for Review" window opens first. Click **OK** once the request details have been read.

Mail for Review

Originated By: John Smith

Requested By: John Smith

Due by: 14-06-19

Comments:

Date	Name	From Company	Comments
11-06-19	John Smith	Houston Contracting	No Comments available

OK

- The reviewer can make revisions and keep the document in review (return it to the originator or send to another reviewer) using the arrow next to the **Send** button and selecting **Send for Review**.

Letter

Send Save Print Close More Attach Files

Send for Review

Send & Close-out

- If sent back to the originator as a draft they will be notified the review is complete and see a **Returned from Review** link within the “My Statistics” and “Mail” widgets within the Dashboard.

They will see all reviewer comments and can make any further changes if required.

Count	Category	Overdue
▶ 785	New mail	289 overdue
▶ 390	Inbox items awaiting response	388 overdue
▶ 16	Sent items awaiting response	12 overdue
▶ 4	To review	
▶ 0	Returned from review	
▶ 84	Inbox items with status "CLOSED-OUT"	

More Personal Company

8. If the mail is ready to send to the final recipient, the reviewer can click **Send** (in which case the Sender details on the mail will change to the reviewer rather than the originator). The Originator will be sent a notification advising them the reviewed mail has been sent.

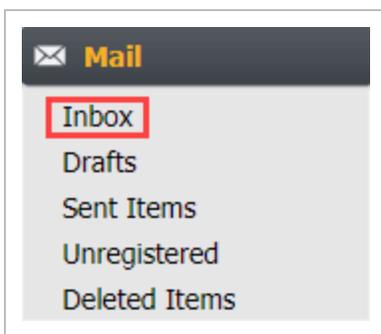
NOTE

- Notifications are sent to the reviewers once the mail has been sent.
- Users with **Company** access to mail can view the review history of mail being reviewed while it is in the Drafts folder in the same way that a reviewer does when a mail for review is opened using the **View Review Comments** from the **More** button.
- It is possible to track “Review Due Date”, “Review Start Date”, “Current Reviewer”, and “Mail Created by” details by adding these columns to the grid in the Draft mailbox using the **Customize** option from the **More** button list of options.

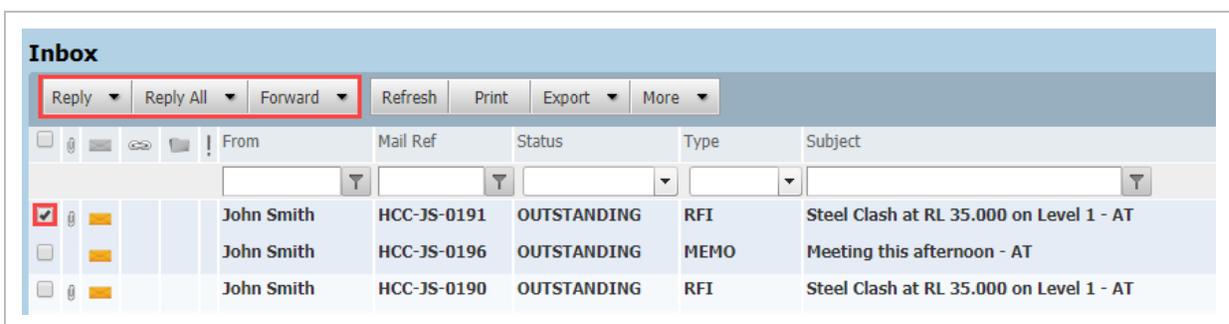
CHAPTER 3 – READING AND RESPONDING TO MAIL

To respond to a mail item:

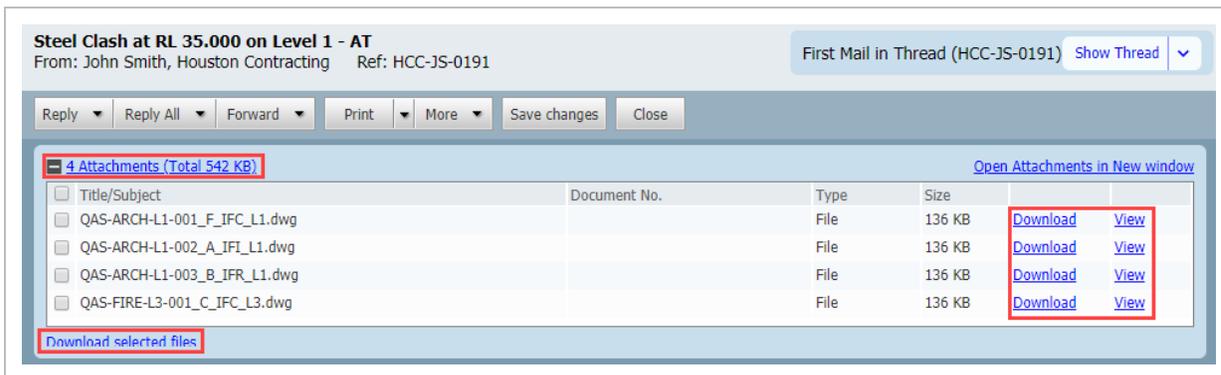
1. From the left menu, click **Mail** then **Inbox**.



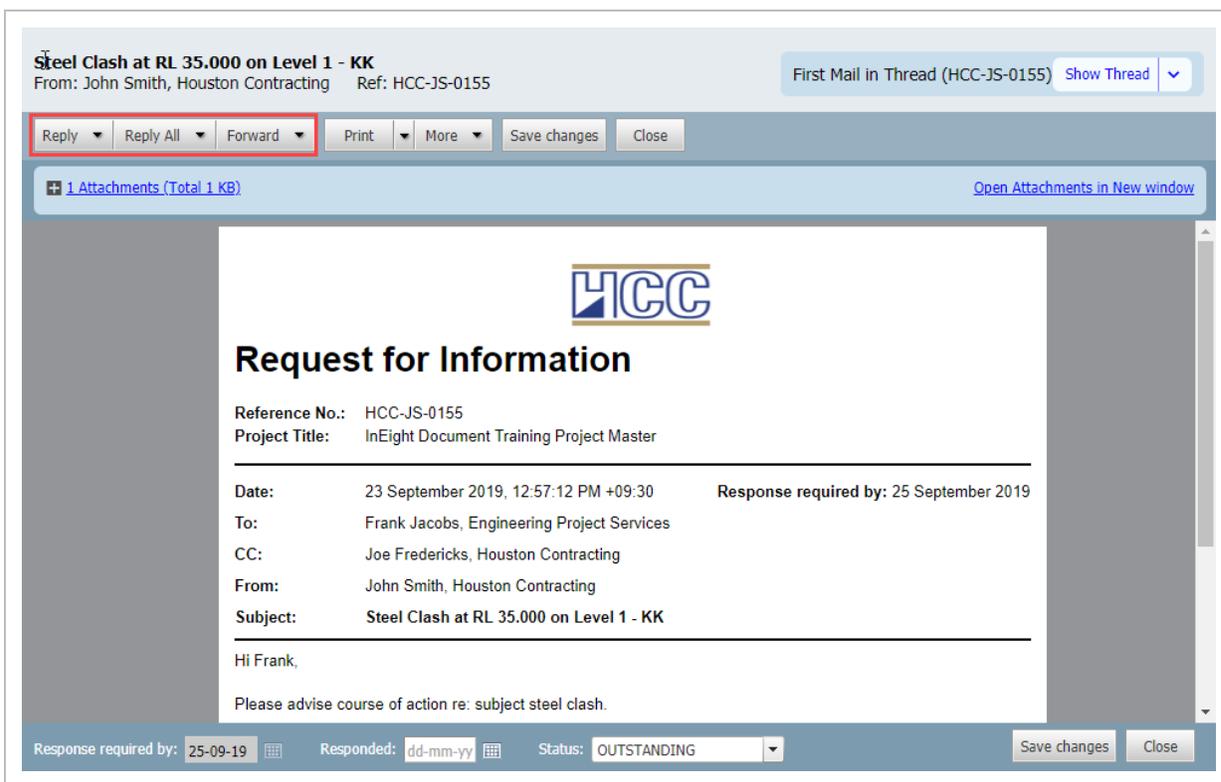
2. From within the Inbox, select the mail item by ticking the box next to it.



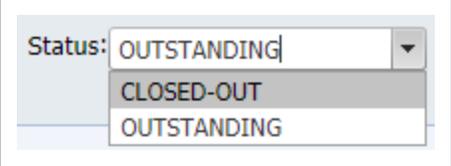
- Attachments are listed at the top of the mail item in an expandable pane click to download.



- Select the **Reply**, **Reply All** or **Forward** buttons on the toolbar then choose a mail type, if required.



- Proceed as normal for creating outgoing mail, then click **Send**.
- Change the **Status** of the original mail as required after responding to it.



A screenshot of a web interface showing a dropdown menu for the 'Status' field. The current selected value is 'OUTSTANDING'. The dropdown menu is open, showing three options: 'OUTSTANDING' (highlighted), 'CLOSED-OUT', and 'OUTSTANDING'.

NOTE Replies or Forwards are automatically linked to the original mail item.

This page intentionally left blank.

CHAPTER 4 – PROCESSING UNREGISTERED MAIL

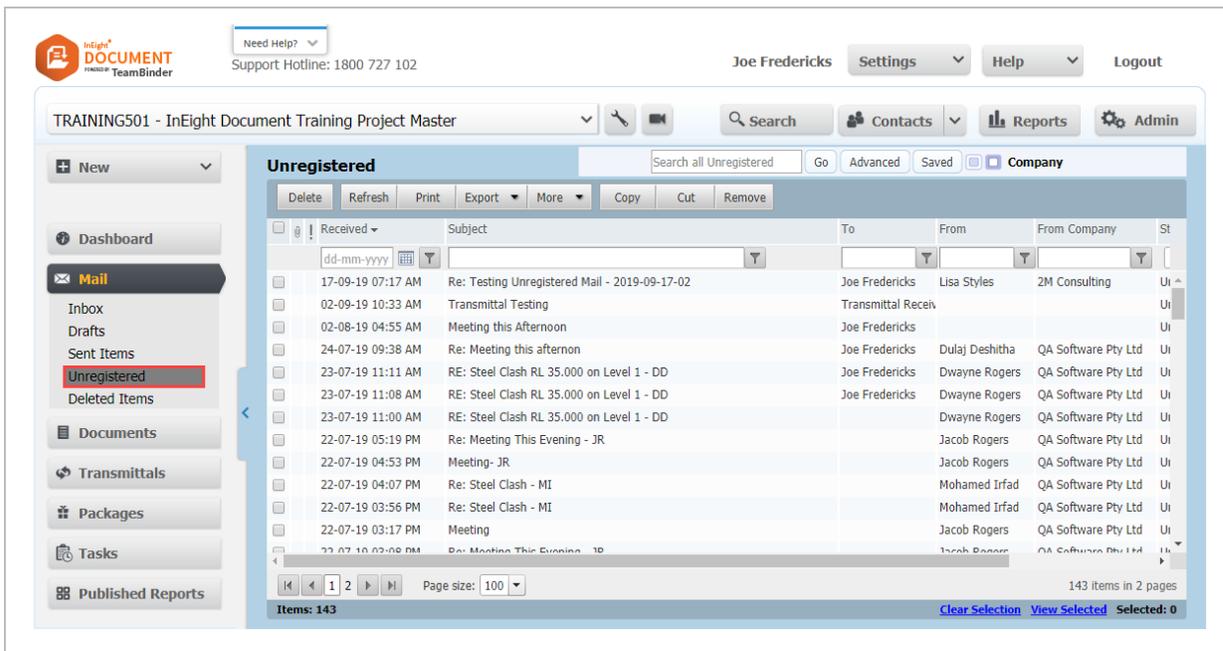
Unregistered Mail refers to any mail generated outside InEight Document either as a reply to InEight Mail (from an External Contact) or using an InEight Email-in address. As it is generated outside of InEight DOC it will be missing at least one classification (mail type) and therefore needs to be assigned any missing fields, including recipients before it can be processed into recipient Inboxes.

Generally Unregistered Mail is delivered back into InEight via a company or department Unregistered mailbox where it is accessed by an administrator for processing. However, if the Unregistered Mail is a response to InEight Mail it may return directly to the originator's personal Unregistered Mailbox.

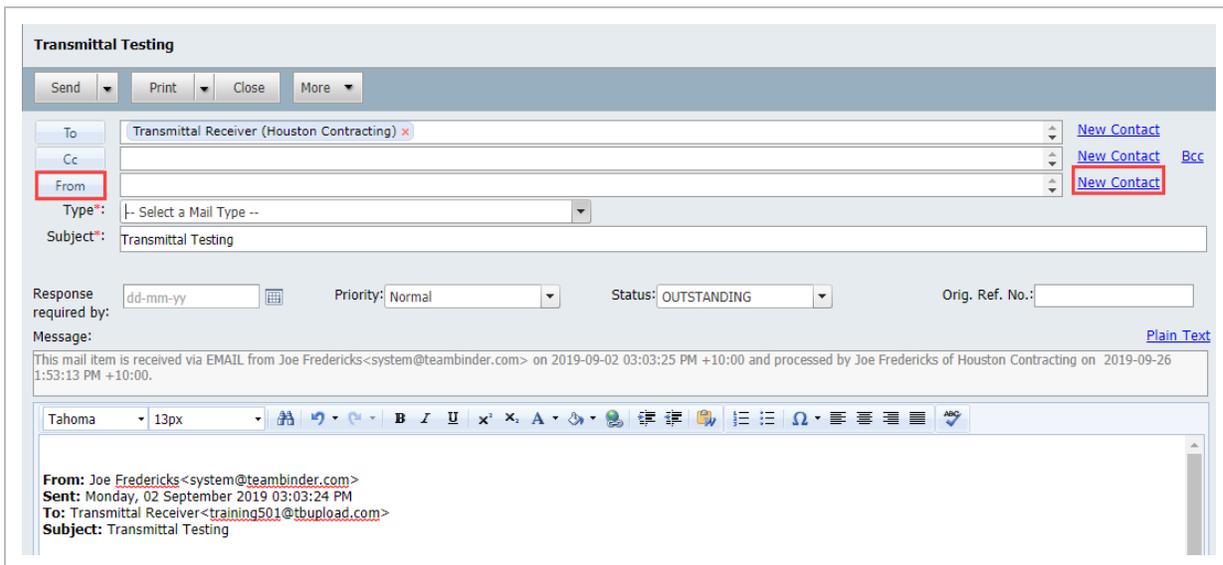
For unregistered mail processed at either a company or department level, the intended recipients are notified about the new incoming mail by notification in the normal way and the new mail appears in their inbox in the same way as it would as if the sender had generated and sent the mail via InEight Document.

To process unregistered mail:

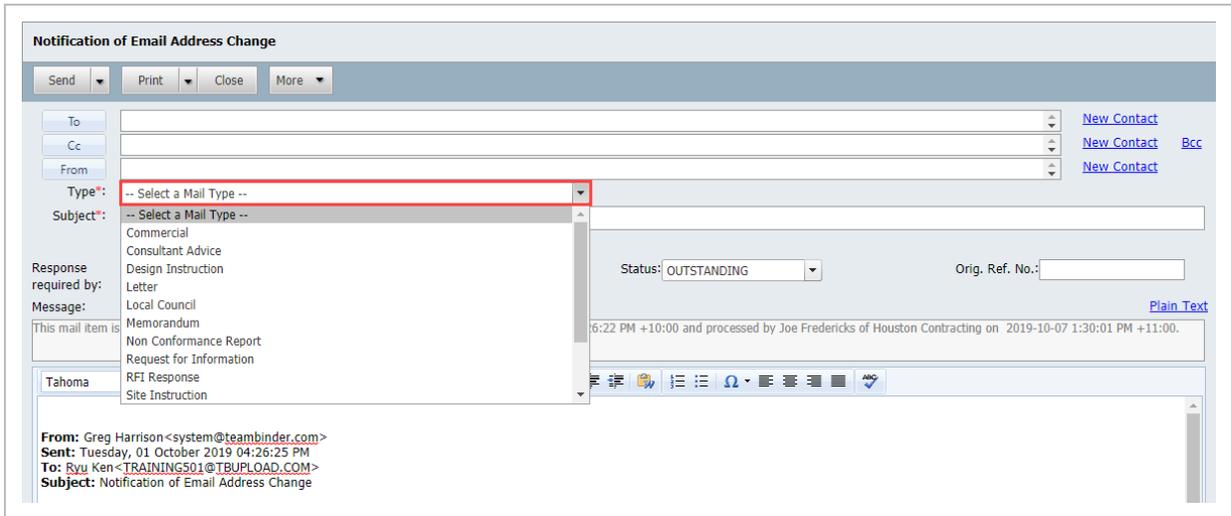
1. From the left menu click **Mail** then **Unregistered**.



2. Open the mail that you wish to process by double clicking on it.
3. Select the recipients as you would a normal InEight Document mail.
4. Select who the Mail was FROM. If the "From" person cannot be located, use the **New Contact** link to add them to the system.



5. Select the relevant mail type (e.g. RFI, MEMO etc.).



6. Populate the details of the mail that will be used to distribute this incoming email.
7. Depending on Project Settings you may be able to modify the mail message prior to sending.
8. Send the mail as normal using the **Send** button.

NOTE

- The system attempts to map the FROM person who sent the email to the correct contact in the InEight Document address book automatically based on intelligent email number recognition.
- Any attachments received on the email will be automatically attached to the mail.
- The details of how and when the email was received, and when it was processed are stored as part of the mail being used to distribute it and cannot be edited.
- Users can only process **Unregistered mail** that has been sent to their own Company's email address.
- For Incoming Emails sent to a company based email address with personal unregistered mail activated, if the addressee is mapped to one or more specific contacts then the unregistered mail would be displayed under Company Mail (Mapped) AND under the Personal Unregistered Mail for the mapped contacts. The mail can be processed by either a user with Company Mail access OR the addressee to who it is mapped. If none of the addressees are mapped, the mail will appear under the Company mail view only.
- For Incoming Emails sent to a Department based email address with personal unregistered mail activated, If the addressee is mapped to one or more specific contacts then the unregistered mail would be displayed under Department Mail (Mapped), Company Mail (Mapped) AND under the Personal Unregistered Mail for the mapped contacts. The mail can be processed by a user with Department Mail access (and belongs to the relevant department) a user with Company access (regardless of his department) OR the addressee to who it is mapped. If none of the addressees are mapped, the mail will appear under the Department mail view only.
- The processed mail will be placed in the Sent items of the person marked in the FROM box of the mail (even though that person may not be an InEight Document user).
- It is possible to reprocess a processed email. Click the **Advanced** mail search button and change the Mail Status option group setting to **Processed** or **All** rather than the default setting of Unprocessed. Note that the system will warn you that you are reprocessing an incoming email.
- Use **Delete** to delete any unregistered incoming emails, they will be moved to the **Deleted Items** folder.
- It is possible to process the incoming email as a document rather than a mail.

NOTE

- If a mail received via unregistered mail is a reply to a mail originating from InEight Document the value of the Originators Ref Number from the original mail is carried forward to the reply (in the same way that Location, Area, and Discipline are carried forward in a thread).

This page intentionally left blank.

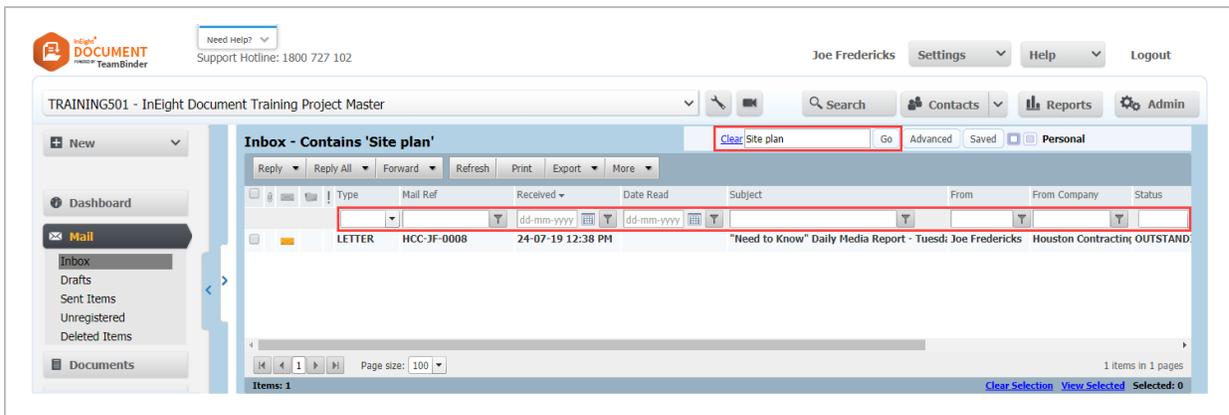
CHAPTER 5 – LOCATING MAIL

- 5.1 Simple Search Options 33
- 5.2 Advanced Mail Search 34
- 5.3 Thread View 36
- 5.4 Mail Folders 38

5.1 SIMPLE SEARCH OPTIONS

The following search options are available from within each mailbox:

1. Use the **Quick Search box** above the mail register. Enter a string of text and click **Go**. Once finished click the **Clear** link to remove the active search filter or click **Default** to return to the user’s default view.



2. Use column filters by entering a text string into the box in the column header and click the icon to the right of the box to choose the filter type. Use the **Clear** link to remove the search filter.
3. If you are using electronic filing via File in Folders, open the Inbox or Sent items and use the

Option	Explanation
Addressed to:	Defaults to Personal Mail but can be modified to include any mail sent or received by your company or department based on access settings.
To:	Select a Company or Person from the drop-down list.
From:	Select a Company or Person from the drop-down list.
Date received:	Search for mail received during a specific date range or for mails received in the last X days. The default here is set in Project Settings.
Responses requested:	Search for mail which require a response during the specified date range or within the next X days.
Show:	Provides three options to filter from - All mail (Default). - New Mail (Mails that are Unread) - Outstanding mail (mails with Status = Outstanding)
Mail Type:	Drop-down list.

Option	Explanation
Priority:	Filter out data using different priority levels.
Mail Ref Contains:	Search by the mail reference number or part thereof.
Subject:	Select a search condition such as “Contains”, or “Begins with” and enter the search text string in the field provided.
Message:	Search across the body text of all mails for a string of text.
Attachment:	Search through text-based file attachments (e.g. MS Word, MS Excel, HTML, RTF and TXT) for a text string.
Attachment Names:	Search based on the name(s) of file attachments.
More Search Options:	Further search capability using a full SQL type Search. Add as many rows as required using the AND or OR options to join the rows together.

NOTE

- **Wild cards** can be used to enhance the search process. Use “?” to search for any character. For example, searching for Document Number A?1 will return A01, A11, A12 etc. Use “*” to match any number of characters. For example, Structur* will return Structural, Structures, Structuring etc.
- To save advanced search settings, click **Save** and enter a Title for the saved settings. You can then use the **Manage** button to load a previously saved search or use the **Saved** button at the top of the mail registers.

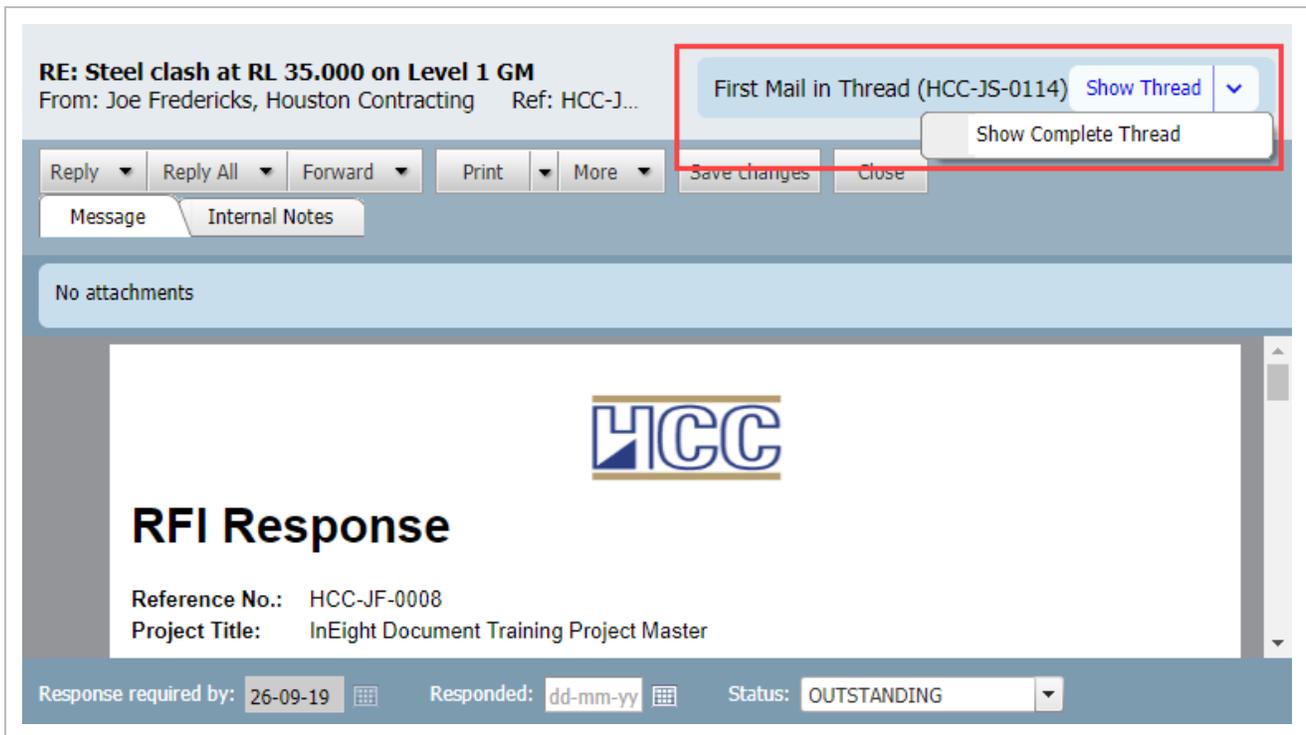
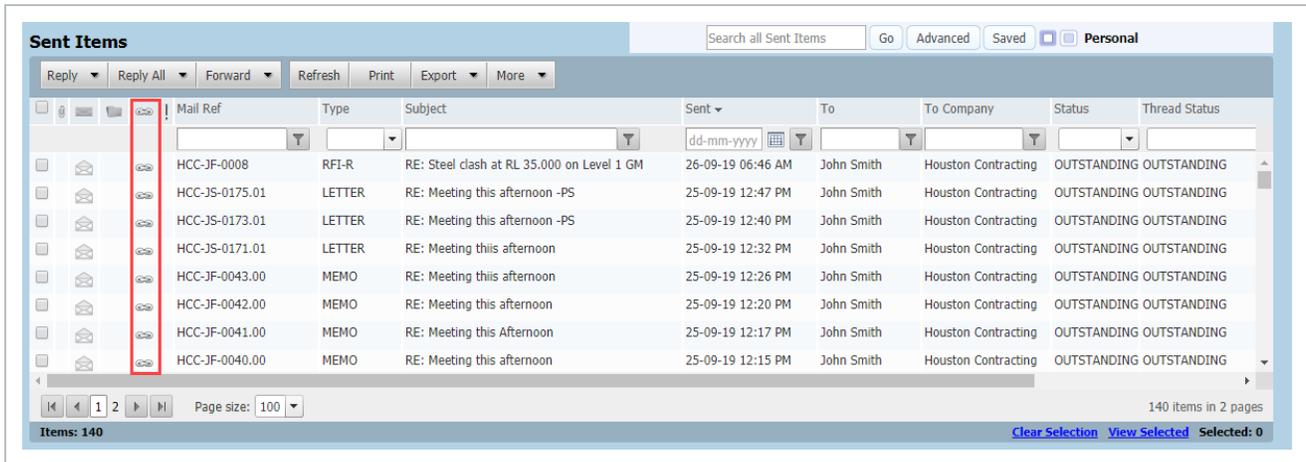
To share the current view of the mail register with an Advanced search active, select **Generate Hyperlink for the current register** from the **More** button list of options. Then choose **Copy to Clipboard** and paste as required. the link into an email, a mail or even into Quick Links. Note that results filtered using quick search or column filters will not be included in this link.

5.3 THREAD VIEW

InEight Document builds a conversational thread (link) between mail items automatically when:

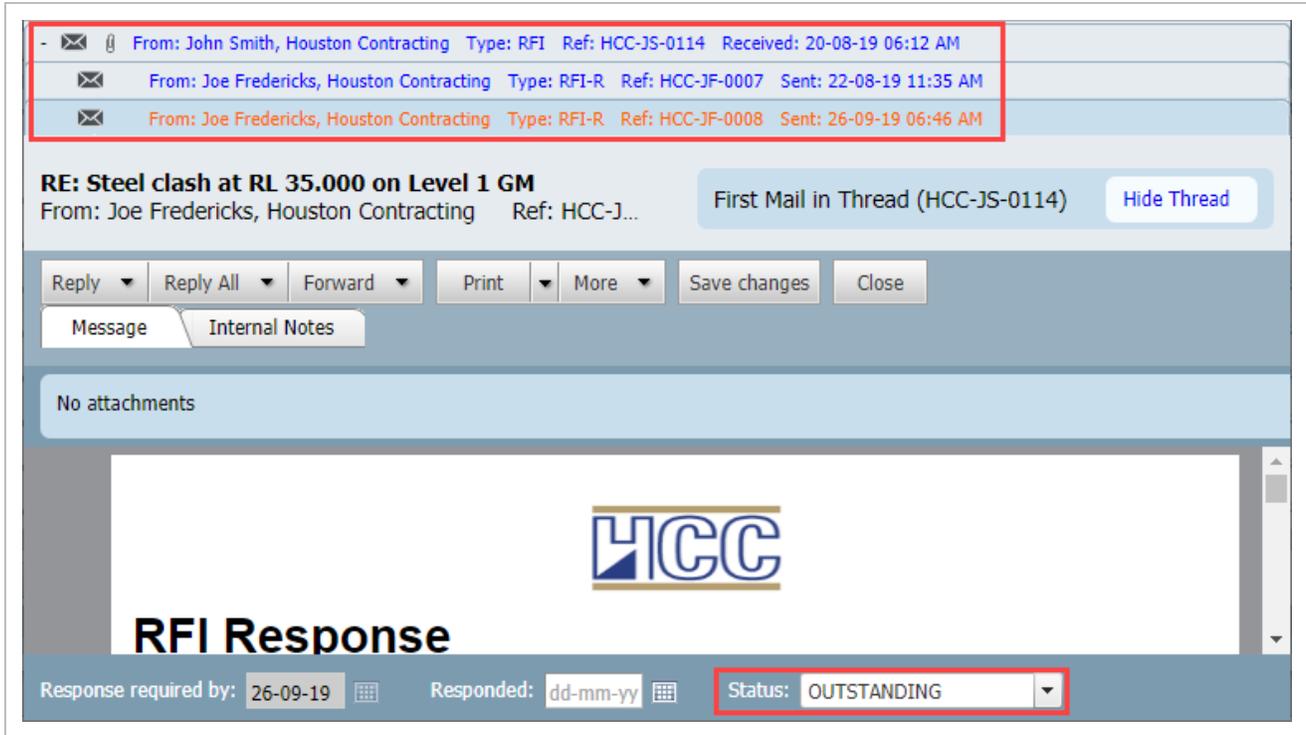
- A mail item is responded to via a reply or forward.
- A mail item is forwarded with other mail.
- Mail is manually linked to other items (mail, documents, transmittals, forms etc).

Mail threads can be accessed either by clicking on the “chain” link icon within the register which will open the mail with the entire mail thread expanded, or by opening mail and selecting the **Show Thread** option in the top right.



Use the + icon to expand the mail view or click on an item in the thread to view it underneath.

Thread Status is shown in the mail details form and is equal to the status assigned by the originator of the first mail in the thread. If the originator changes the status of the first piece of mail, the thread status will also be updated automatically.

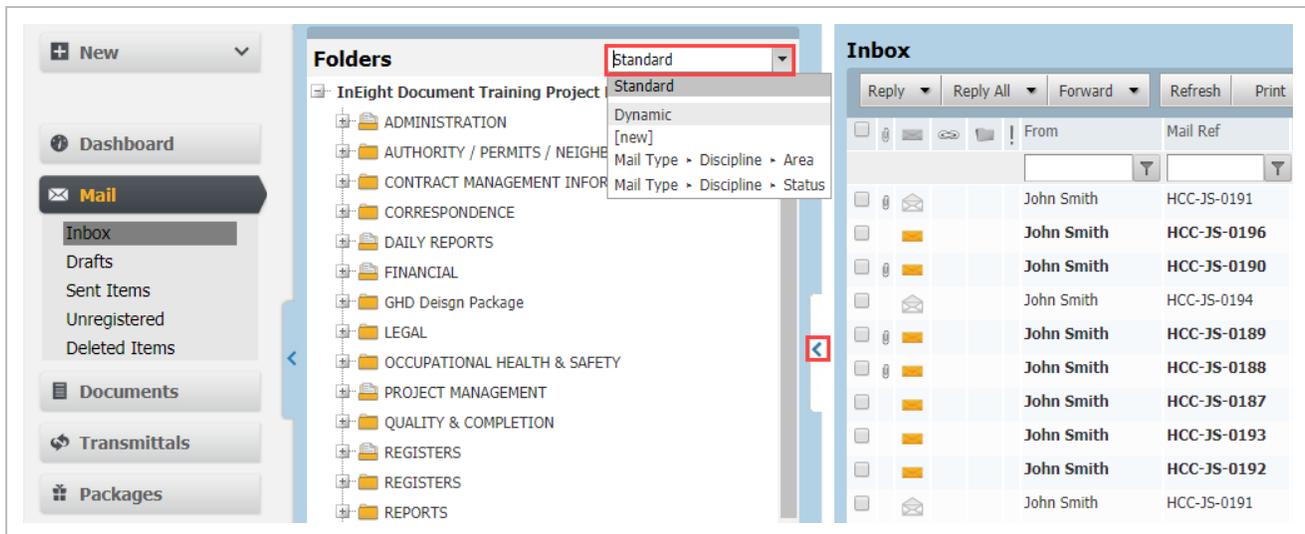


Mail thread roots are defined as all mail created by clicking the **New** button.

5.4 MAIL FOLDERS

InEight Document incorporates the use of Folders as an additional option for indexing mail. By using the **File in Folder** feature, a “copy” of a mail can also be seen to appear in one or more Folders, where an existence of a Folder is similar to the concept of a multi-level Folder Structure.

To view mail folders, use the **Expand folder pane** icon to the right of the inbox or sent items registers.



There is only ever **one** copy of any mail in InEight Document. File in Folder feature is simply another way of indexing and viewing mail.

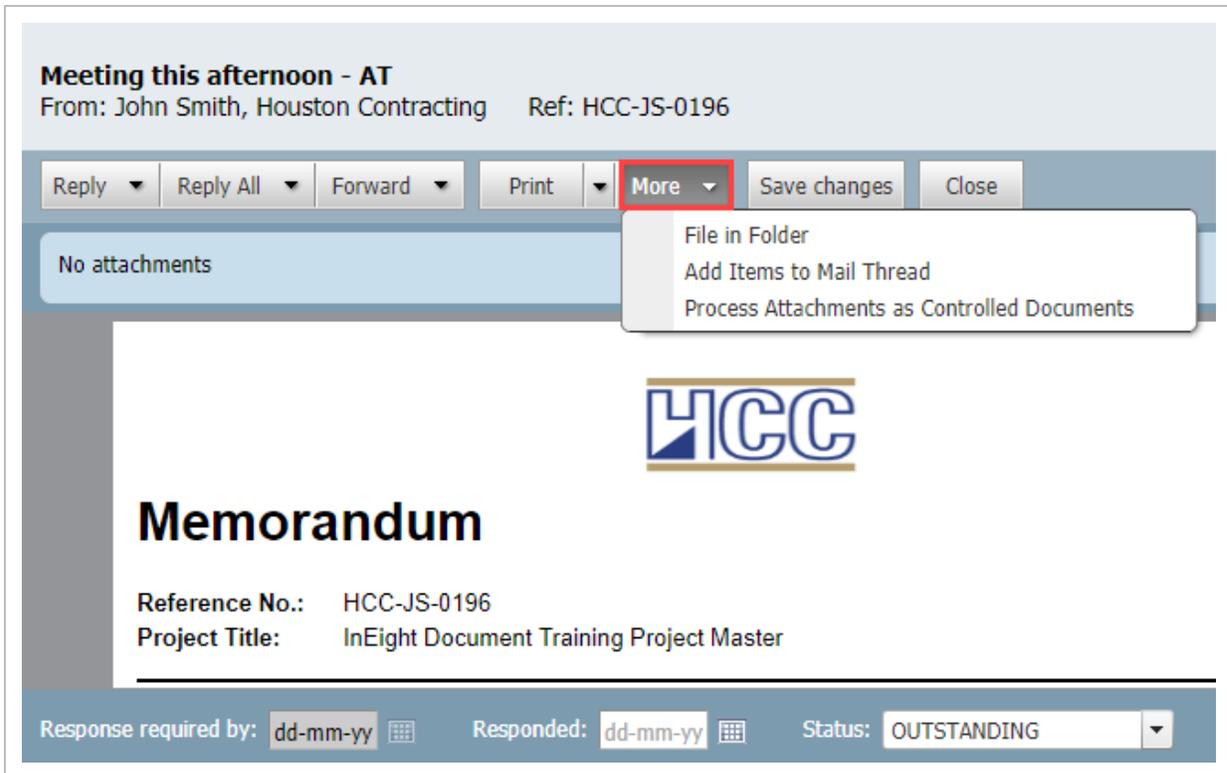
Smart Folders can be used to effectively automatically file mail or other data times into folders based on folder specific rules.

Dynamic Folders can be used to automate both the creation of folders and the filing of mail in within those folders based on key metadata assigned to each mail item. Select from the drop-down list of options at the top of the folders pane to display any Dynamic Folders.

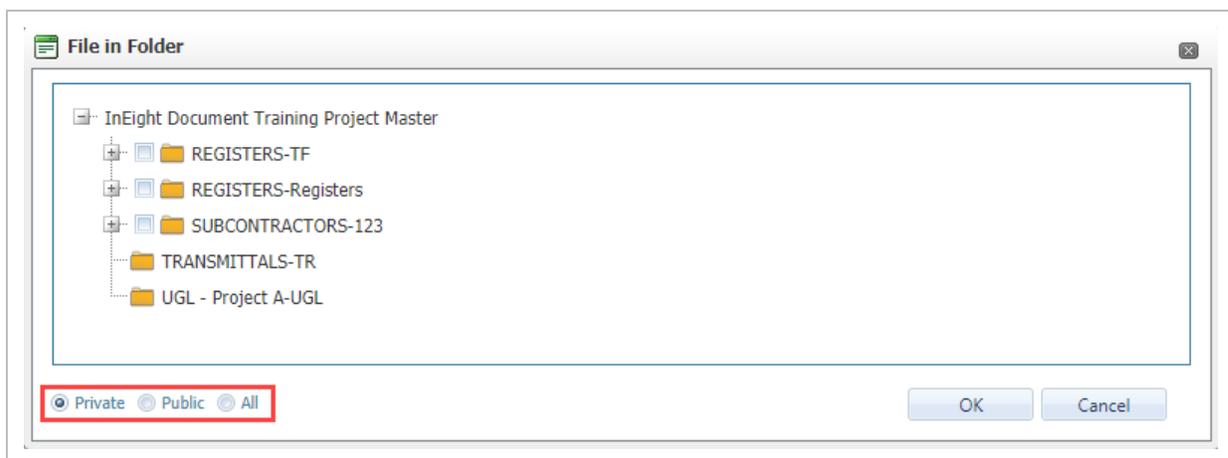
To file mail in a folder drag the mail from the mailbox into the correct folder.

Alternatively:

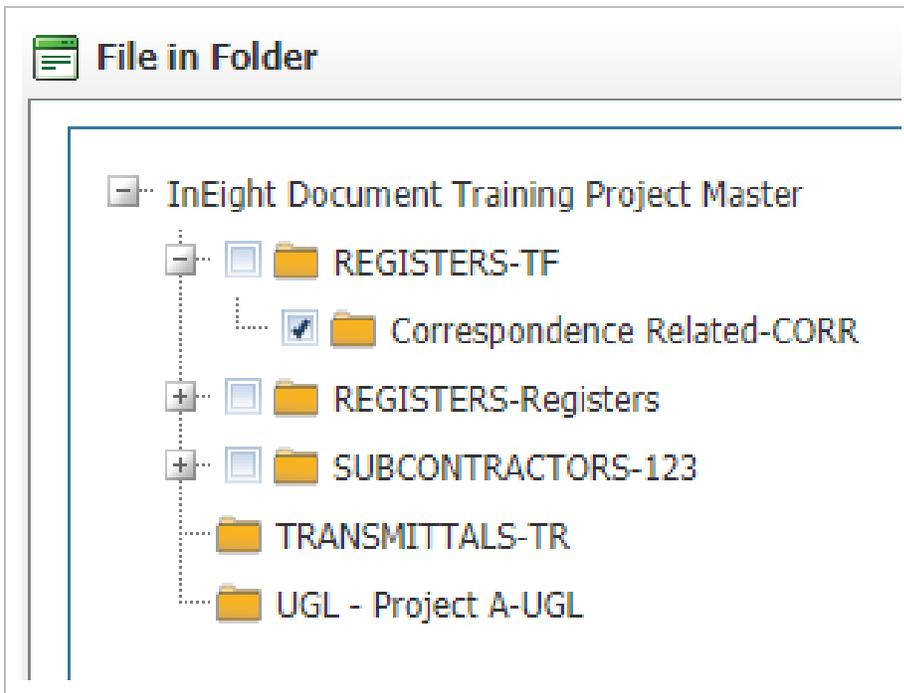
1. Open the mail and select **File in Folder** from the **More** button drop down list. The File in Folder Screen will now load.



2. Choose the Folder type from the options in the bottom left corner of the file in folder screen. The options are: **Public**; **Private**; or **All**.



3. Expand the folder structure using the + signs to locate the folder to file the mail into.

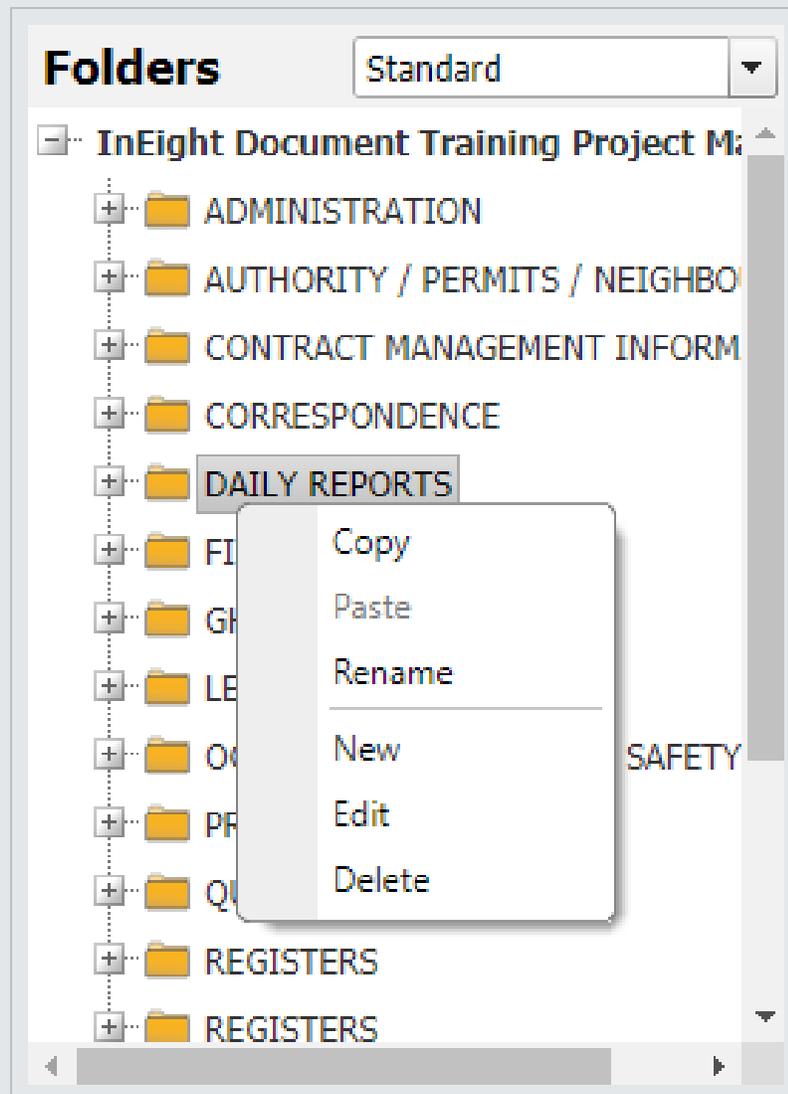


4. Add the mail to the required folder by ticking the select box next to the folder.
5. Click **OK**.

NOTE

- Mail items within Folders are always subject to the standard mail security and access rules regarding Personal/Department/Company mail and mail types.
- Mail Items can be filed in multiple Folders. However, there is still only ever one copy of the mail in InEight Document. It can simply be viewed via the Folder it is filed in.
- Mail items that have been filed in one or more Folders have a filing icon displayed against them in the Inbox and Sent items mail registers.
- Right click on items in folders to **Cut**, **Copy**, **Paste** or **Remove**. The copy option that is available from a right click on a folder is used to copy a folder container to new folder (the contents are not copied).

NOTE



- When filing mail from within the Unregistered mail module during processing, the following rules apply:
 - If the Sender, Recipient and Processor are from the same company, both copies of the processing mail are auto filed in the File in Folder.
 - If the Sender and Recipient are from different companies and the processor selects a Public Folder, again both copies of the processing mail are filed in the same place.

If the Sender and Recipient are from different companies and the processor selects a Private Folder, then only the copy of the processing mail delivered to the Inbox of the Addresses (assuming they are in the same company as the processor) is filed.

This page intentionally left blank.

CHAPTER 6 – MANAGING MAIL

6.1 Manually Linking Mail	45
6.2 Mail Status	48
6.2.1 Changing Mail Status	48
6.3 Exporting mail to HTML or PDF	50
6.4 Deleting Mail	51
6.5 Processing Mail Attachments as Controlled Documents	53
6.6 Cancelling Mail	55
6.7 Forwarding Mails in Bulk	57
6.8 Mail Favorites	59

6.1 MANUALLY LINKING MAIL

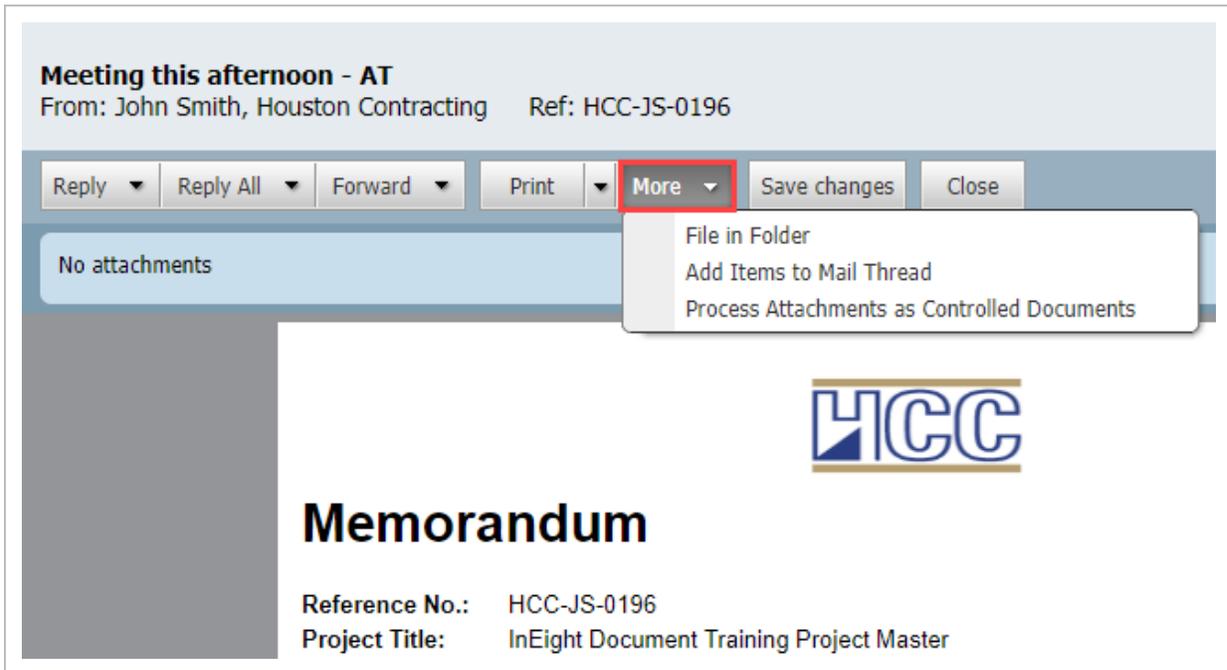
When you reply or forward mail a link to the original mail is created.

Mail can also be linked manually to other mail, documents, transmittals or other InEight DOC module items.

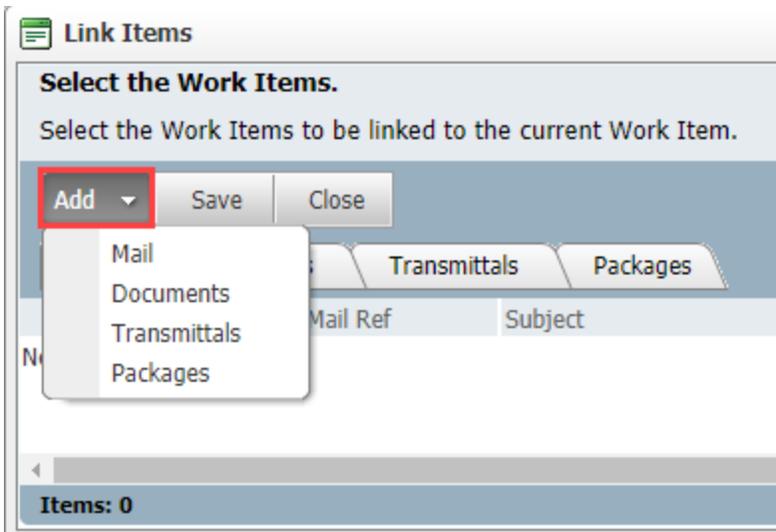
To manually link an item to mail:

1. Open the mail from the **Inbox** or **Sent Items** mail folder.

2. Select **More**, then **Add Items to mail thread**.



3. Click **Add** and select the type of item that you wish to link (eg document, form, package etc) to open the search window.



4. Apply the required search attributes, locate the work items to add to the thread and click **Search**.

- At the next window, use the tick boxes to select the work items to link, click **OK**. The selected Work Items will be linked with your mail.

Type	Mail Ref	Received	Subject	To	From	
<input type="checkbox"/>	MEMO	HCC-JS-0176.00	25-09-19 05:17 PM	RE: Meeting this afternoon -PS	Joe Fredericks	John S
<input checked="" type="checkbox"/>	MEMO	HCC-JS-0175.00	25-09-19 05:17 PM	Meeting this afternoon -PS	Joe Fredericks	John S
<input checked="" type="checkbox"/>	LETTER	HCC-JS-0173.02	25-09-19 05:11 PM	RE: Meeting this afternoon -PS	Joe Fredericks	John S
<input type="checkbox"/>	MEMO	HCC-JS-0174.00	25-09-19 05:10 PM	RE: Meeting this afternoon -PS	Joe Fredericks	John S
<input type="checkbox"/>	MEMO	HCC-JS-0169.00	25-09-19 04:47 PM	Meeting this Afternoon	Joe Fredericks	John S
<input type="checkbox"/>	MEMO	HCC-JS-0168.00	25-09-19 04:45 PM	Meeting this afternoon	Joe Fredericks	John S
<input type="checkbox"/>	RFI	PREM-T2-0002.00	25-09-19 01:34 PM	Piping Dimensions 2.0	Joe Fredericks	T 2
<input type="checkbox"/>	RFI	PREM2-T2-0001	24-09-19 03:54 PM	Confirmation on Piping Dimension	Joe Fredericks	T 2
<input type="checkbox"/>	RFI	PREM-T2-0001	24-09-19 03:21 PM	Floor Height in Section 1	Joe Fredericks	T 2
<input type="checkbox"/>	RFI-R	HCC-JS-0006	23-09-19 01:32 PM	RE: Steel clash at RI 35.000 on level 1 - RAW	Joe Fredericks	John S

- To add work items from a different module, again click the **Add** button and repeat the process above.

7. Click **Close** when done and save when prompted.
8. You will receive a confirmation message once the system completes building the selected links.

NOTE

- Click the **Add Items to mail thread** option in the new mail screen to create links to mail before sending.
- The link icon  is displayed against mail with links in the mail registers.

6.2 MAIL STATUS

Every item of InEight mail (incoming and outgoing) has an allocated Status. This allows users to mark or tag each mail item with the status as they see it and provides users with a filterable field to allow them to quickly and easily see what mail items are awaiting some action either by them or the recipients.

Mail can be managed by regularly updating the status of resolved items to closed out. When accessing mail folders, using the Management Summary at the Dashboard or by using the default view or saved searches functionality, it is possible to view only mail at a status such as mail Outstanding.

The default status codes are outstanding (generally applied to all mail by default) and Closed-Out. Additional mail status codes can be configured by administrators.

6.2.1 Changing Mail Status

There are several different ways to change the status of mail.

- From within the Mail item, select the status drop-down below the mail message.

Steel Clash at RL 35.000 on Level 1 - ...
From: John Smith, Houston Contracting ...

First Mail in Thread (HCC-JS-0191) [Show Thread](#) ▾

Reply ▾ Reply All ▾ Forward ▾ Print ▾ More ▾ Save changes Close

+ 4 Attachments (Total 542 KB)

HCC

Request for Information

Reference No.: HCC-JS-0191
Project Title: InEight Document Training Project Master

Date: 07 October 2019, 09:45:29 AM +10:30 Response required by: 10 October 2019, 09:45:29 AM +10:30
To: Frank Jacobs, Engineering Project Services
CC: Joe Fredericks, Houston Contracting
From: John Smith, Houston Contracting
Subject: Steel Clash at RL 35.000 on Level 1 - AT

Response required by: 10-10-19 Responded: dd-mm-yy Status: **OUTSTANDING**

- From the mail creation window: Use the status drop down above the subject field, or by selecting **Send and Close out** using the arrow next the **Send** button.

RFI Response

Send Save Print Close More Attach Files

Send for Review
Send & Close-out

From: Joe Fredericks
Subject*: RE: Steel Clash at RL 35.000 on Level 1 - AT

Response required by: dd-mm-yy Priority: Normal Status: **OUTSTANDING**

- From the Mail Register: Select the item(s) you wish to update then click **More > Change Status to**, update the status of these items and click **Yes** to confirm.

Inbox

Reply Reply All Forward Refresh Print Export More

	From	Mail Ref	Status	Received
<input type="checkbox"/>	John Smith	HCC-JS-0191	OUTSTANDING	
<input type="checkbox"/>	John Smith	HCC-JS-0196	OUTSTANDING	
<input type="checkbox"/>	John Smith	HCC-JS-0190	OUTSTANDING	03-10-19 04
<input type="checkbox"/>	John Smith	HCC-JS-0194	OUTSTANDING	03-10-19 05
<input type="checkbox"/>	John Smith	HCC-JS-0189	OUTSTANDING	03-10-19 06
<input type="checkbox"/>	John Smith	HCC-JS-0188	OUTSTANDING	03-10-19 07
<input type="checkbox"/>	John Smith	HCC-JS-0187	OUTSTANDING	03-10-19 08
<input type="checkbox"/>	John Smith	HCC-JS-0193	OUTSTANDING	03-10-19 09
<input type="checkbox"/>	John Smith	HCC-JS-0192	OUTSTANDING	03-10-19 10

Change Status to
Closed-out
Outstanding

NOTE

The Status of an incoming item of mail that requires a read receipt cannot be changed to Closed-out until the read receipt is sent.

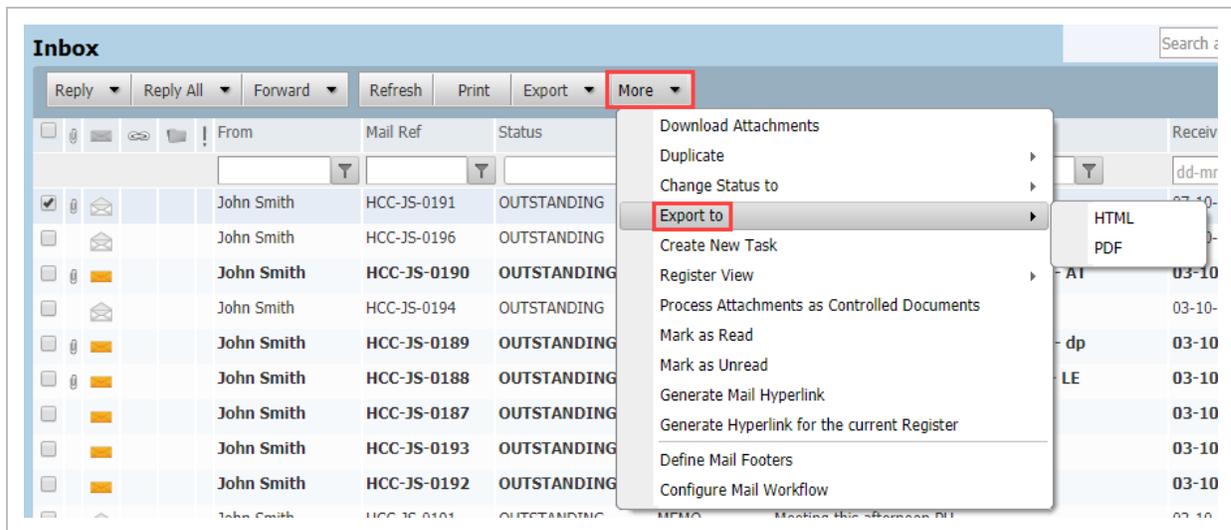
6.3 EXPORTING MAIL TO HTML OR PDF

Mail items stored in the InEight Document Inbox, Sent Items, or Drafts mail folders can be exported to HTML or PDF format as a single zip file.

To export mail:

1. Select one or more mail items to be exported by ticking the select boxes against them.

2. Click **Export, Selected Mails** and then select from **HTML** or **PDF**.



3. Alternatively select **Export To** from **More** drop down list and choose either **HTML** or **PDF**.
4. The selected mails are zipped on the InEight Document server and downloaded to your PC.
5. **Save** the zip file containing the exported mail items to the appropriate location.

NOTE

- The zipping process may take a few minutes if many mail items are selected.
- A single mail being exported is not zipped.

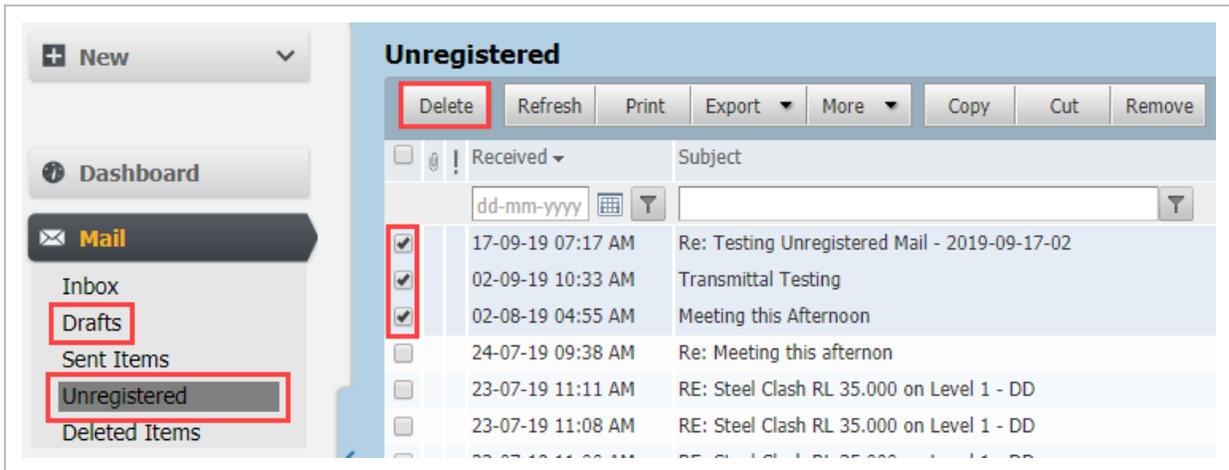
6.4 DELETING MAIL

Although mail stored in the InEight Inbox and Sent Item registers **cannot** be deleted, drafts and unregistered (unprocessed) mail can be deleted.

All deleted mail is first moved to the **Deleted Items** mailbox. From here it can be permanently deleted (removed completely from the InEight Document system).

To delete mail:

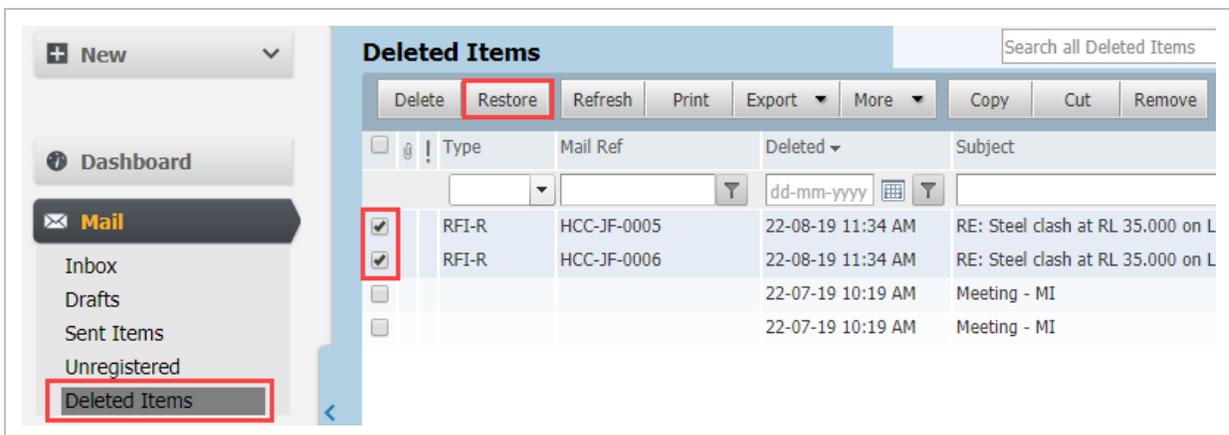
1. Open the Drafts, or Unregistered mailbox from the left menu.



2. Select the mail items to delete using the tick box.
3. Click **Delete** on the toolbar.
4. Click **Yes** when prompted.

To restore deleted mail:

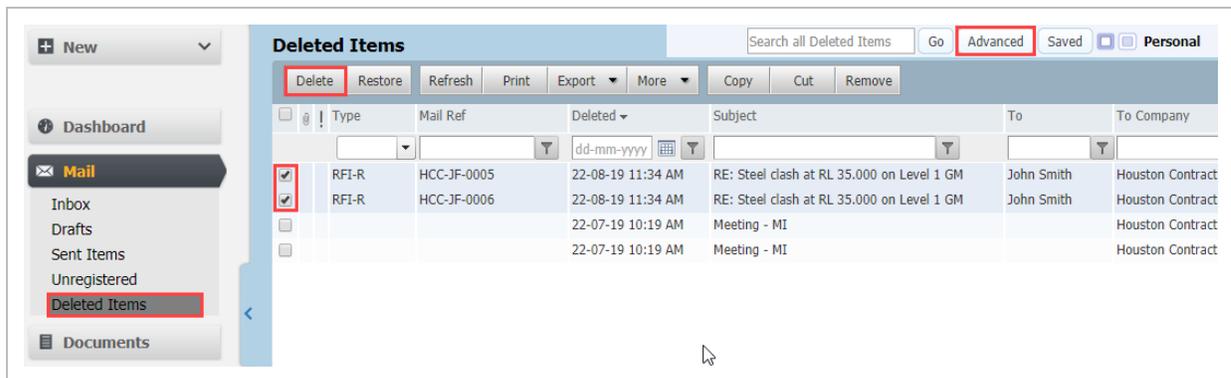
1. Open the **Deleted items** mail box from the left menu.



2. Select mail items to be **restored** using the tick box.
3. Click the **Restore** button on the toolbar (the mail will be restored to the mailbox it was deleted from).
4. Click **Yes** to confirm the restore process.

To permanently delete mail:

1. Open the **Deleted items** mail box from the left menu.

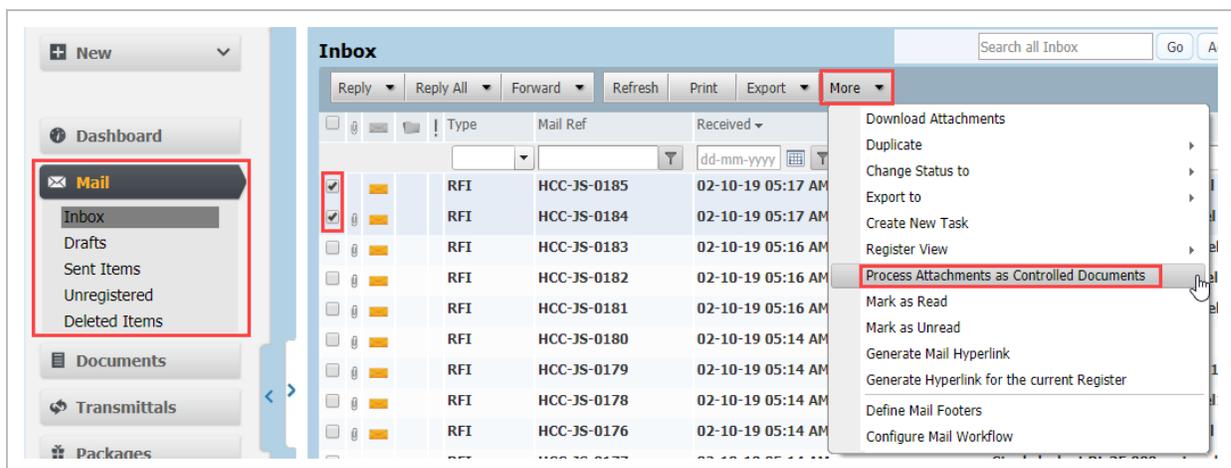


2. Select mail items to be **deleted permanently** by ticking the select box against them. Use the **Advanced** mail search if required to locate the required mail.
3. Click **Delete** to permanently delete the selected items and click **Yes** when prompted.

6.5 PROCESSING MAIL ATTACHMENTS AS CONTROLLED DOCUMENTS

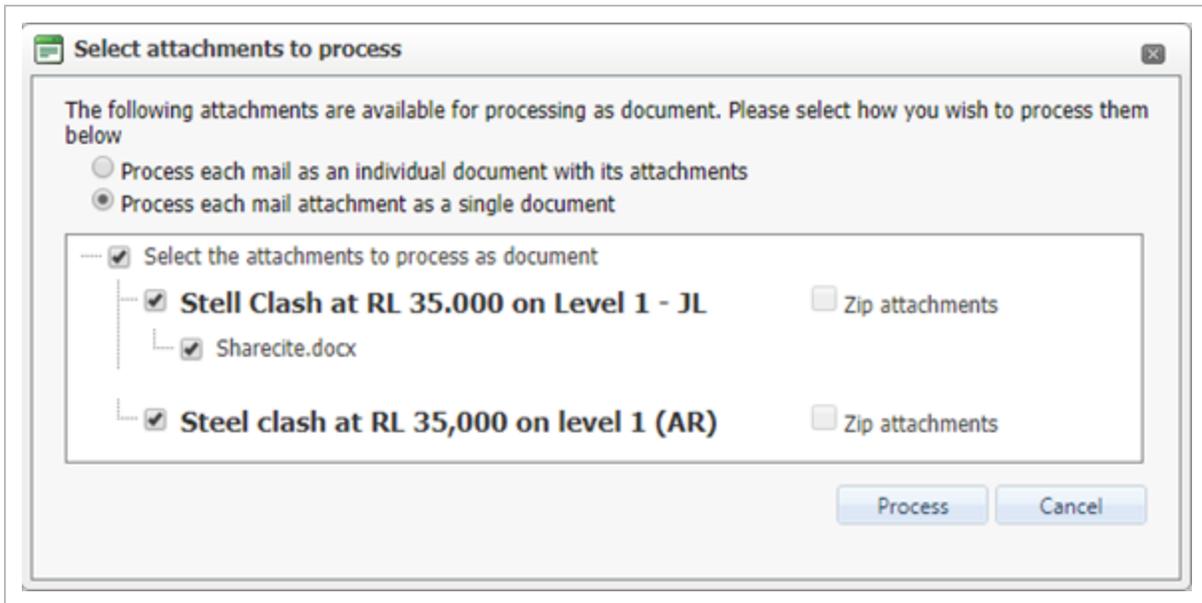
To process mail file attachments as controlled documents:

1. From the **Inbox**, **Sent Items** or **Unregistered** mail box, select mail item(s) with attachments to be processed.



2. Click **More**, then **Process attachments as controlled documents**. Alternatively open a single mail item, click **More**, then **Process attachments as controlled documents**.

3. At the “Select Attachments to Process” window, choose between:
 - Processing each mail item as an individual document with its attachments (relevant only if you have selected multiple mail items to be processed).
 - Process each separate mail attachment as a single document (default).



4. All attachments for the selected mails will be selected by default. If you have chosen the first option above, each mail will be processed as a single document with one or more view files (one per attachment). If you have chosen the default option, each attachment to each mail will be processed as separate document.
5. Select/De-select attachments as required and click **Process**.
6. Enter the document details in the same way you would if uploading documents directly from the document register. If processing multiple attachments the Bulk Upload Documents window will load.



7. Click **Save** when done and **Yes** when prompted.

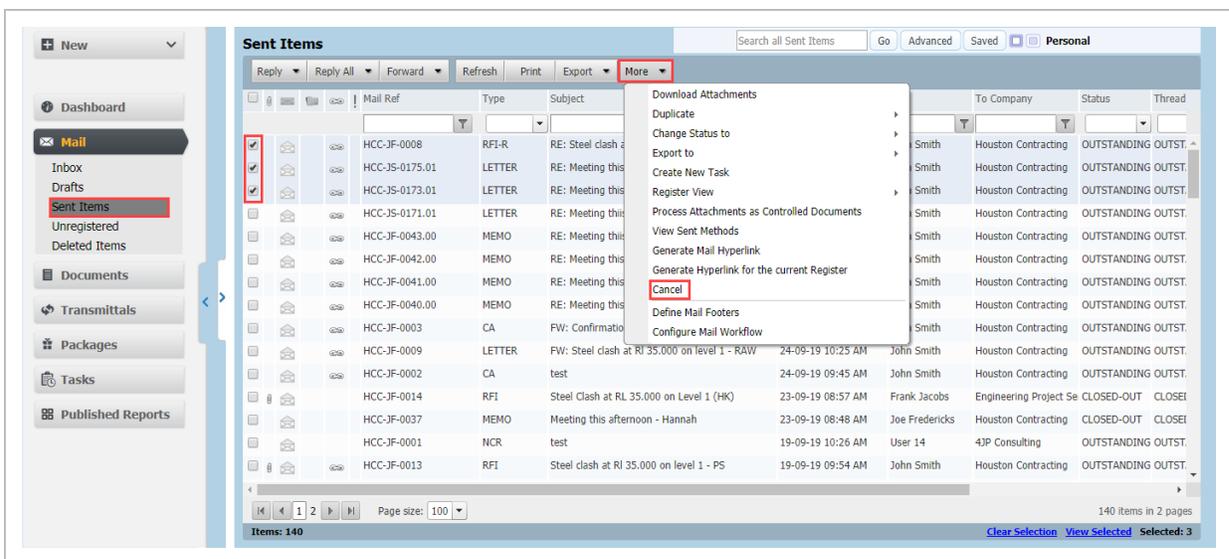
NOTE **Note:** The process described above applies similarly to processing the attachments of an incoming transmittal received via unregistered mail from another InEight Document project and when using the “Process Transmittal as Controlled Documents” option.

6.6 CANCELLING MAIL

Although InEight DOC mail cannot be deleted, it can be cancelled if this option is activated via the Project Settings.

To Cancel a Mail:

1. From the Sent Items register, select mail then click **More** and choose **Cancel**.



2. At the **Cancel Mail** window enter the reason the mail is being cancelled.



3. The option to notify recipients of deleted mail is ticked by default. Deselect this if you do not want a notification sent to recipients.
4. Click **OK**.
5. Cancellation details will now appear at the top of the mail and a cancelled watermark will be displayed on each page of the mail.

The screenshot displays an email interface for a 'Formal Letter'. At the top, it shows the sender 'Joe Fredericks, Houston Contracting' and the reference number 'HCC-JF-0010.00'. A 'Show Thread' button is visible. Below the header, there are action buttons: 'Reply', 'Reply All', 'Forward', 'Print', 'More', 'Save changes', and 'Close'. The main content area shows 'No attachments' and a large watermark that reads 'Cancelled' with the HCC logo. The cancellation details are as follows:

Cancelled By: Joe Fredericks, Houston Contracting
Cancelled on: 02-10-2019 at 09:59 AM
Cancelled Reason: test

Cancelled


Letter

Reference No.: HCC-JF-0010.00
Project Title: InEight Document Training Project Master

Date: 01 October 2019, 08:33:38 AM +05:30 **Response required by:**
To: Frank Jacobs, Engineering Project Services
CC: John Smith, Houston Contracting
From: Joe Fredericks, Houston Contracting
Subject: Formal Letter

See attached letter for you to view.

Regards,
 Joe

At the bottom of the interface, there are fields for 'Response required by' (dd-mm-yy), 'Responded' (dd-mm-yy), and 'Status' (OUTSTANDING), along with 'Save changes' and 'Close' buttons.

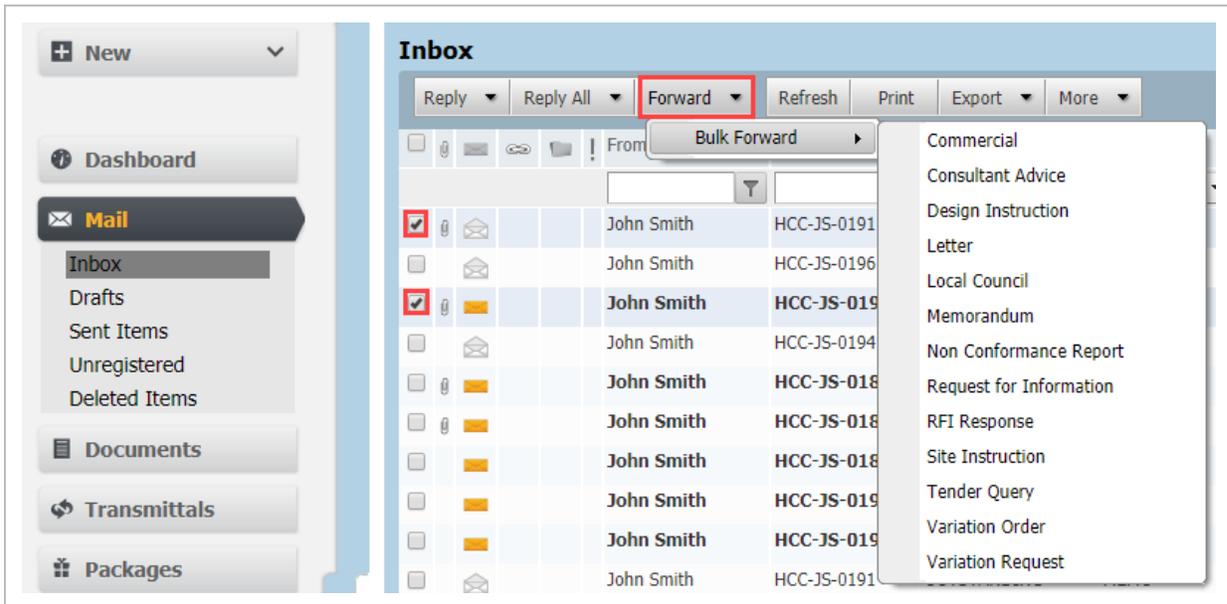
NOTE

- To cancel mail, the user must have been granted relevant permissions including send access to that mail type. The mail must also have been sent by a user in the same company. The ability to cancel mail can be restricted to the Project/Company Administrators, and/or Company Users, and/or Senders from within Project Settings.
- In the Inbox, cancelled mails are not displayed by default. They can however be displayed by ticking the **Show Cancelled Mails** tick box in the Advanced Search window.
- In Sent Items, cancelled mails are displayed as greyed out.
- Cancelled mails appear greyed out in mail threads unless the Hide cancelled mail in Inbox option has been ticked in which case they will not appear at all in Inbox threads.
- The Cancellation date field can be added to mail registers using the Customize options.
- If using Outlook Integration with the mail module, cancelled mails are not showed within Outlook at all.

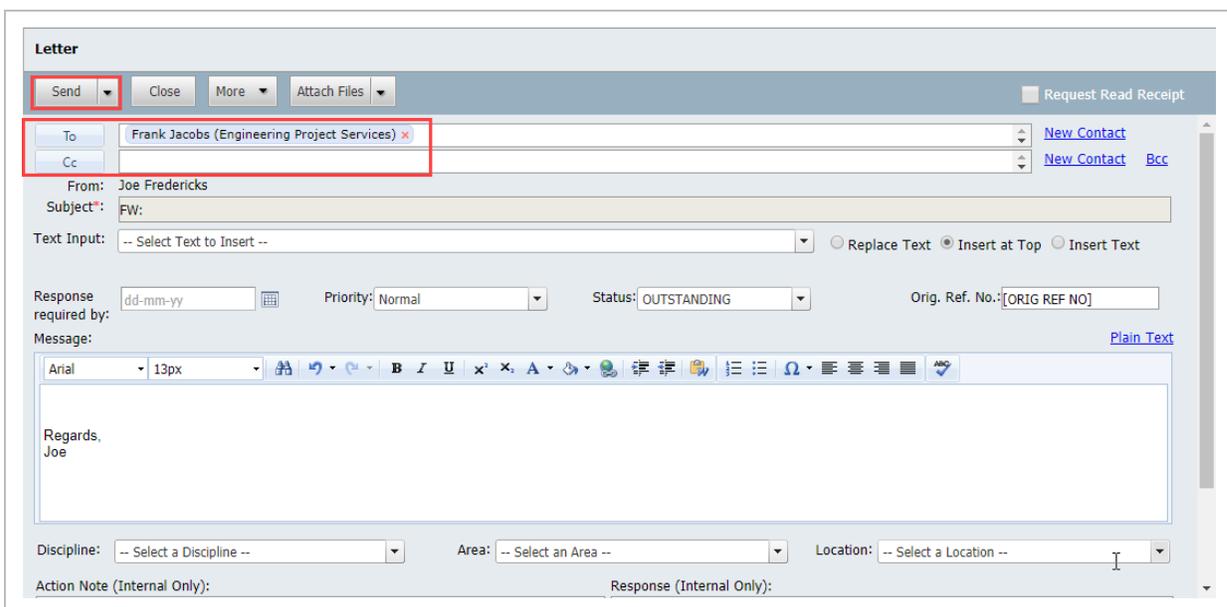
6.7 FORWARDING MAILS IN BULK

To forward mail of the same mail type in bulk:

1. From the left menu, click **Mail** and select either **Inbox** or **Sent Items**.

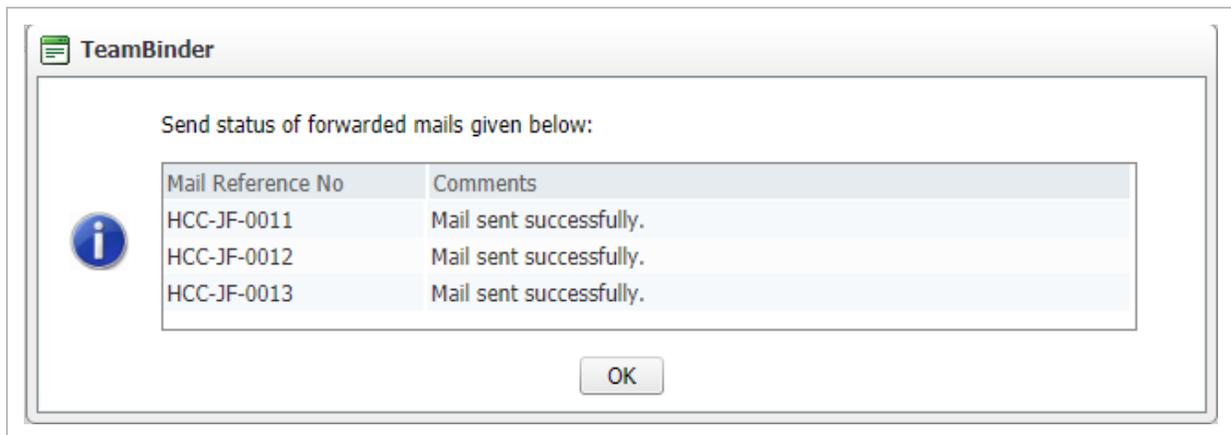


2. From the Inbox or Sent Items Mail Register, click the arrow next to **Forward**, **Bulk Forward** and select the mail type to use for forwarding the mail.
3. At the new mail window that appears, select the recipient(s) to whom the mails will be forwarded.



4. Click the **Send** button. Each mail will be forwarded one by one as an individual mail.
5. A confirmation window will be displayed with the list of new mail items that have been

generated.



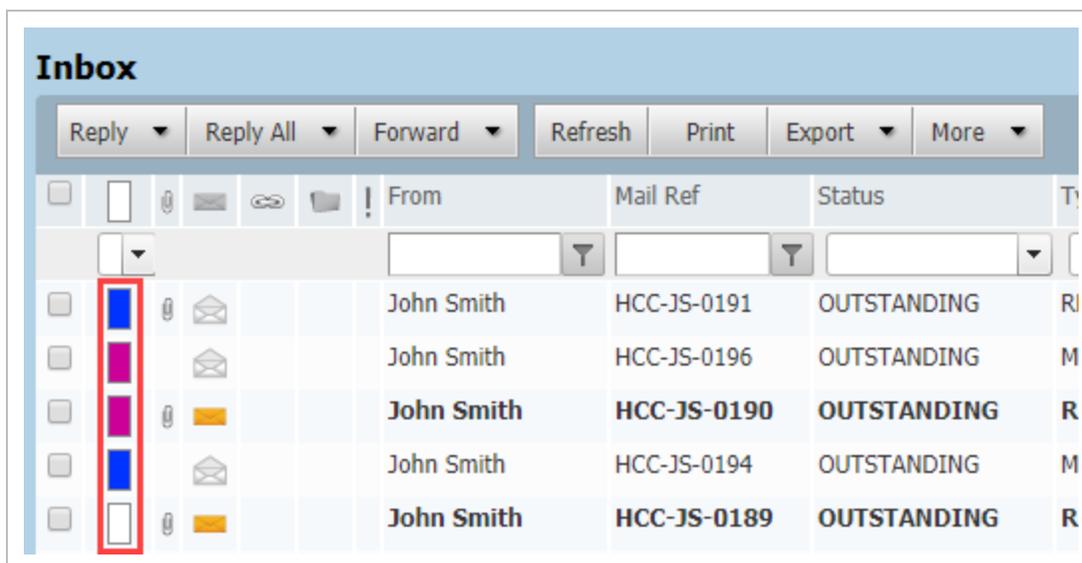
NOTE

The Subject field cannot be changed as the original mail subject line must be retained.

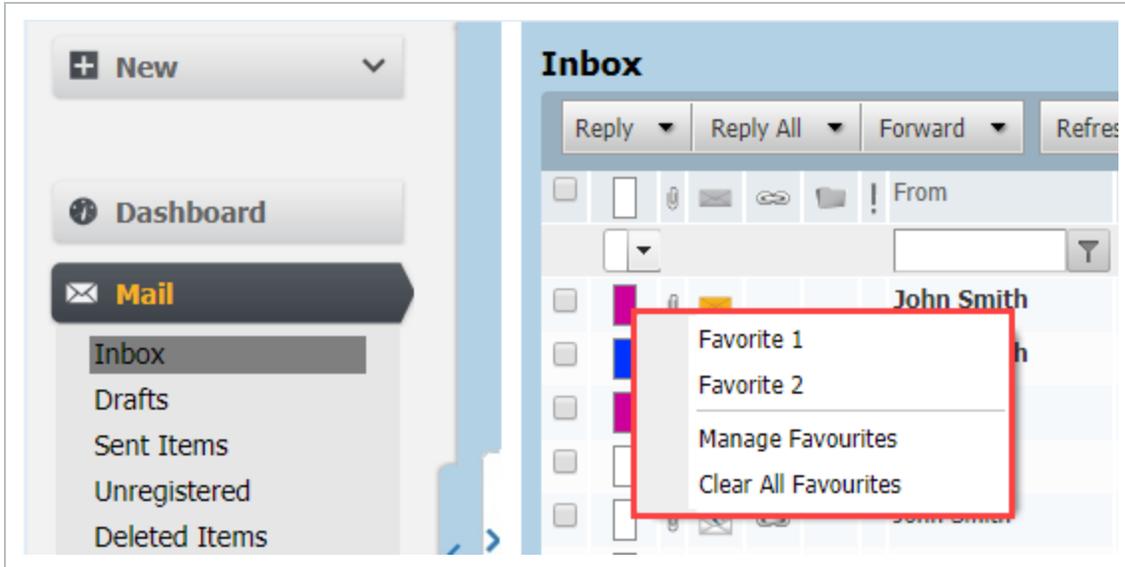
6.8 MAIL FAVORITES

Mail Favorites allow users to create their own personal color codes for commonly accessed mail items.

1. Click on the **Favorite** Icon against mail to mark it with the default color classification. If a Favorite classification is already set, it will be cleared.



2. Right click on any classification icon then select **Manage Favorites** to create your own classifications.



3. Right click then select **Clear all Favorites** to remove all classifications assigned to mail.

NOTE

If the Favorites icon column is not already displayed in your mail register view it can be added via the **More, Register View, Customize** Option. The field name to make visible is "Favorite".