

**OUTLOOK
INTEGRATION USER
GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – INTRODUCTION TO OUTLOOK INTEGRATION

The Outlook Integration Tool for use with InEight Document is a plug-in that enables users to view, send, and receive their InEight Document mail and Transmittals from within MS Outlook, rather than having to login to InEight Document. All actions relating to InEight Document mail/transmittals performed within MS Outlook are then stored back in the InEight Document system automatically.

Features	Benefits
Access to the complete correspondence and transmittal message history of a project with all InEight Document formatting, custom fields and attributes including Reference Number, Discipline and Status retained.	Eliminates the need to use two different systems. The user automatically inherits a personal archive of all sent and received InEight Document project mail, segregated into separate projects in Outlook
Use of Outlook to create, send, and receive InEight Document mail and transmittals.	Familiarity with Outlook minimises need for additional training.
Complete status management.	Encourages the use of InEight Document project correspondence to be expedited and closed-out.
Offline capability. InEight Document mail is automatically downloaded into dedicated folders in Outlook.	Ability to read project correspondence offline and draft responses.
All overdue items highlighted in red for ease of identification	Quickly identify correspondence for which response is overdue

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CHAPTER 2 – INSTALLING OUTLOOK INTEGRATION

1. Close Microsoft Outlook, if it already open.
2. Download the installation package using one of the following links:
 - If you are using 32-bit version of Microsoft Outlook:
www.teambinder.com/download/outlook/TBOutlookIntegrationsetup.zip
 - If you are using 64-bit version of Microsoft Outlook:
[www.teambinder.com/download/outlook/TBOutlookIntegrationsetup\(x64\).zip](http://www.teambinder.com/download/outlook/TBOutlookIntegrationsetup(x64).zip)

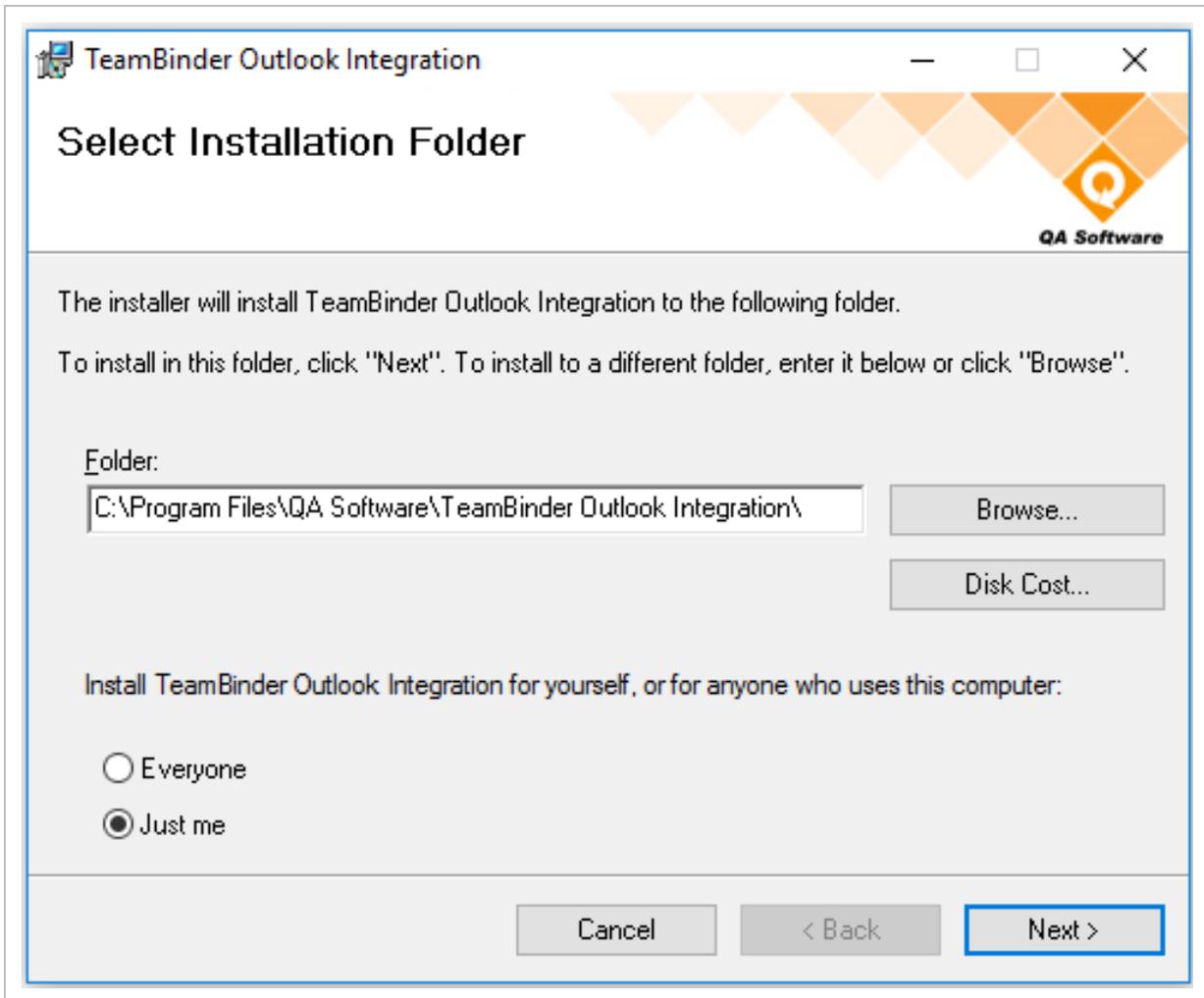
NOTE If you are unsure which version of Microsoft Outlook you are using, within Outlook select **File » Help » About Microsoft Outlook**.

2.1 PRE-REQUISITES

- Windows (any)
- Outlook 2003 Onwards
- Dot Net Framework V 4.0

2.2 INSTALLATION STEPS

1. Once the download is complete, unzip the zip files.
2. Double click and run the setup exe from the extracted files.
3. Select a folder location for file installation. Select “Just Me” for yourself or “Everyone” in order to install for all who use the computer.
4. Click **Next**.



5. Select **Default Installation** then click **Next**.

NOTE The default Installation installs Outlook Integration with pre-defined settings. Custom Installation allows you to choose you own settings when installing Outlook Integration.

6. Click **Next** once more to begin installation.

2.3 CUSTOM INSTALLATION SETTINGS

If **Custom Installation** is selected at step 5 in section 2.2 above then the window below will appear, allowing you to apply your custom installation settings. This allows you to specify additional settings especially if your corporate policies do not allow your outlook Data file to be stored in the default location or if specific proxy settings are required.

1. Add Proxy information if required to connect to the internet. This will be pre-configured for all users of this InEight Document Outlook Integration instance.
2. Select the appropriate Data store location:
 - **Default:** Data gets stored in the user's local application data folder.
 - **Roaming:** Data is stored in the user's roaming application data folder.
 - **Custom:** Used to specify a custom location. Although the network location drives can be specified, QA Software does not recommend this as it leads to data corruption issues.
3. "Enable auto update" is selected by default. By deselecting this option auto update will be set to "Never" and the Outlook Integration user will not be able to change this setting.
4. "Show Manage Projects screen when Outlook starts" is selected by default. When deselected it will not show the manage projects screen when Outlook starts.

Settings

Proxy

URL:

Domain:

User name:

Password:

Data store location:

Default Roaming Custom

Enable auto update

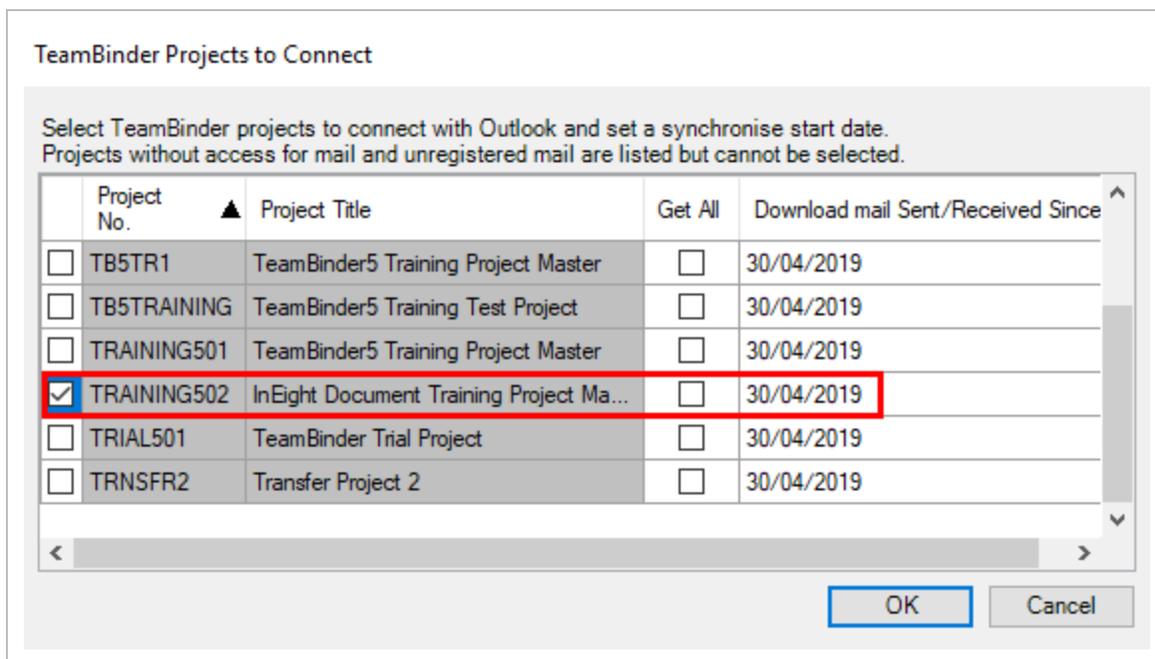
Show Manage Projects screen when Outlook starts

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3.1 CONNECTING TO INEIGHT DOCUMENT FROM OUTLOOK

When starting Outlook for the first time after installation of the plug-in, you are prompted to identify which InEight Document Server/Projects you want to connect to.

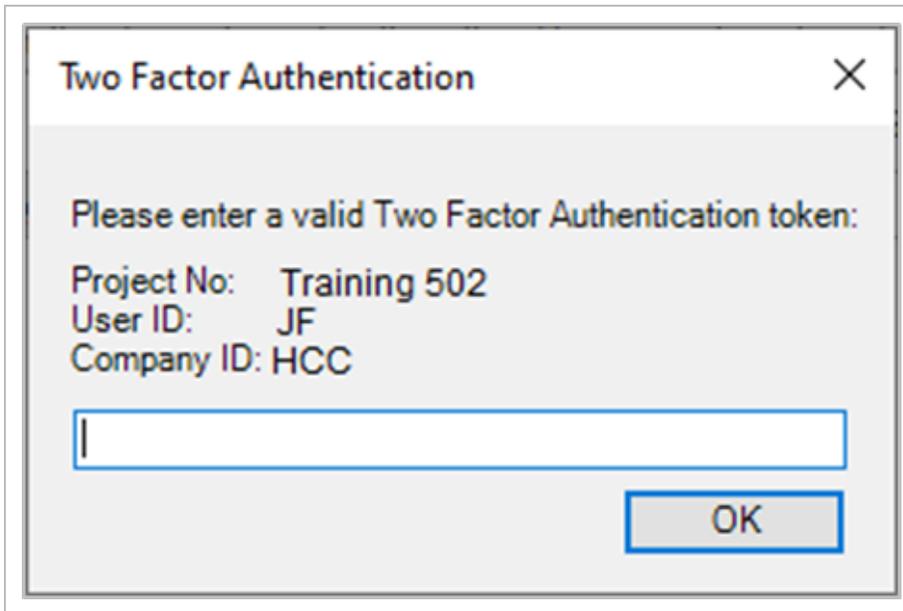
1. Click the **Add** button to connect one or more InEight Document projects to Outlook.g
2. At the Login window select the appropriate server that your project is located on. This is the URL shown once logged into InEight Document. If you are unsure of the server details, contact the InEight Document Help Desk.
3. Log in by entering your InEight Document User ID, Company ID & Password or Company Login then clicking **Login**. A list of the InEight Document Projects you have access to will then be displayed.



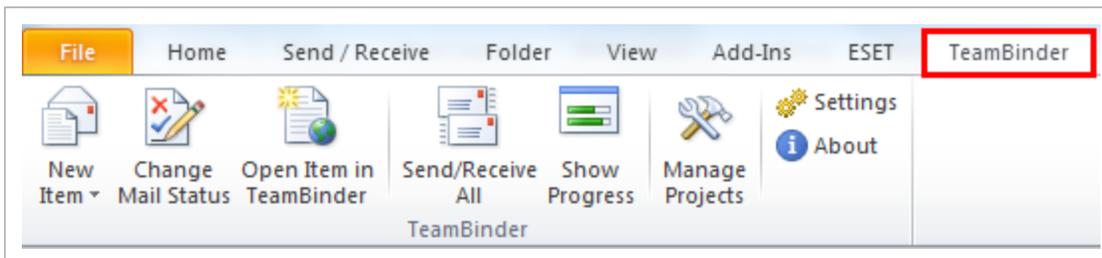
4. Select the Project(s) to synchronise with Outlook Integration.
5. Tick **Get All Mail** to download existing InEight Document Mail.

Warning: As this process could take a long time if you enter a very early date, entering a date less than a month ago in the Download mail/Sent/Received Since column is recommended

6. Click **OK** to confirm the selected projects.
7. If Two Factor Authentication is enabled for the InEight Document account being added, Outlook Integration will prompt you to enter the 'Two Factor Authentication token' generated in your Authenticator App in your mobile device.



8. Once all required projects are added, click **OK**. The InEight Document tab has now been added to the Outlook ribbon.



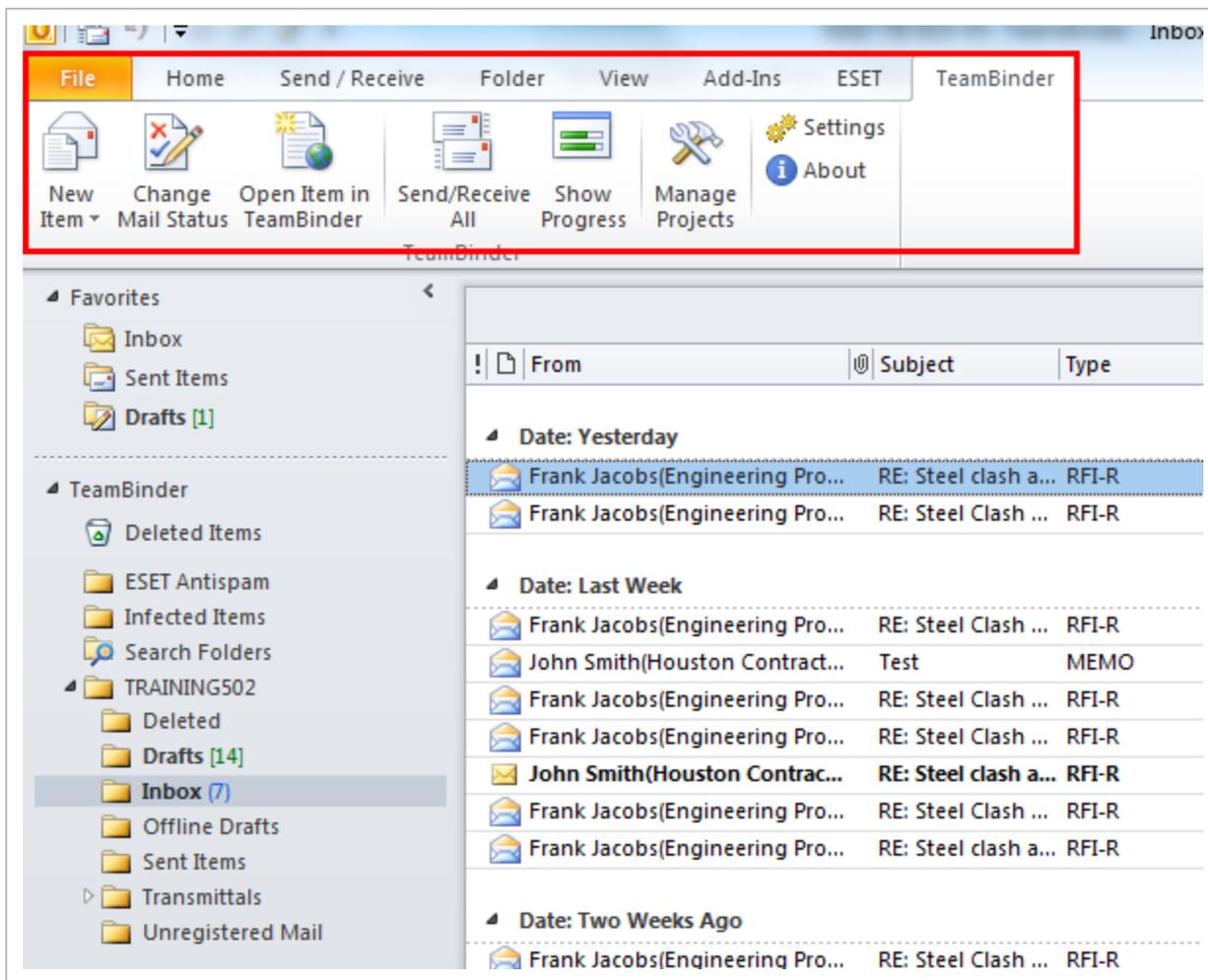
NOTE

- To use a company login rather than your personal user login, at Step 3 above click on the Company Login (Single Sign-on) tab. The Company Login requires the email address linked to your InEight Document Account and is only available if InEight Document Single Sign-On is pre-configured for your company by InEight. Please contact your InEight Document account manager or Project Delivery Consultant for more information on this.
- Use the **Change** button to change the user that is currently logged into the same project. Then enter new login details.
- To limit the size of attachments downloaded into Outlook from InEight Document before adding a project, click the **Settings** button and select the **General** then adjust the size limit for file attachments against the option Download mail or transmittal attachments equal or less then (KB).
- To change the Title of the project within Outlook simple double click on the Project Title field in the Manage Projects window (this can be useful if you want to add the same project more than once for different user Ids.)
- The date from which mail/transmittals are synchronised can also be modified by double clicking on the Synchronise From" field.

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CHAPTER 4 – INEIGHT DOCUMENT MAIL FUNCTIONS

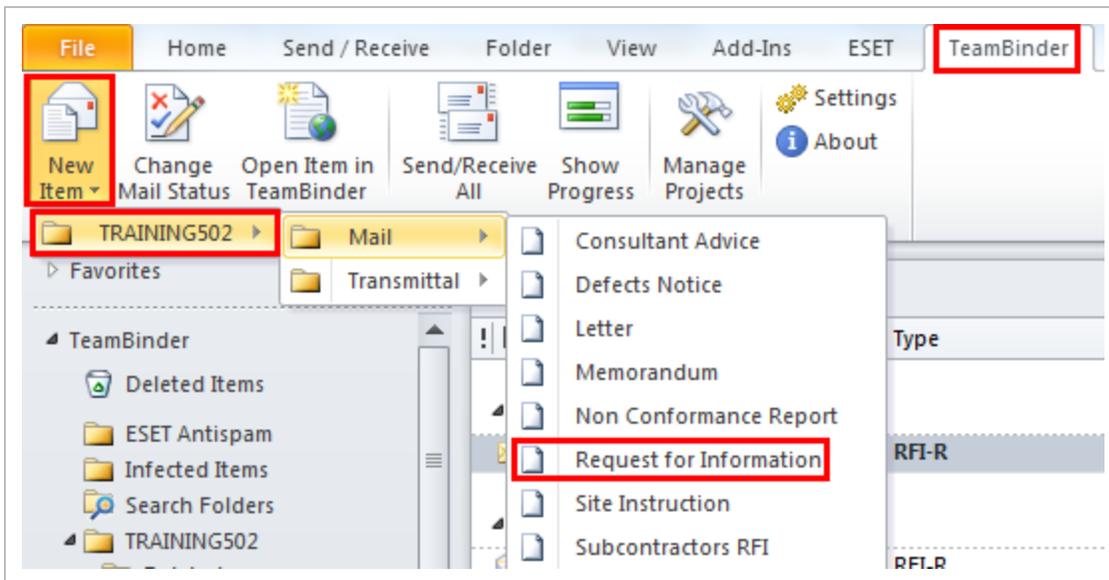
From the InEight Document Tab you can manage all the normal InEight Document mail functions within Outlook.



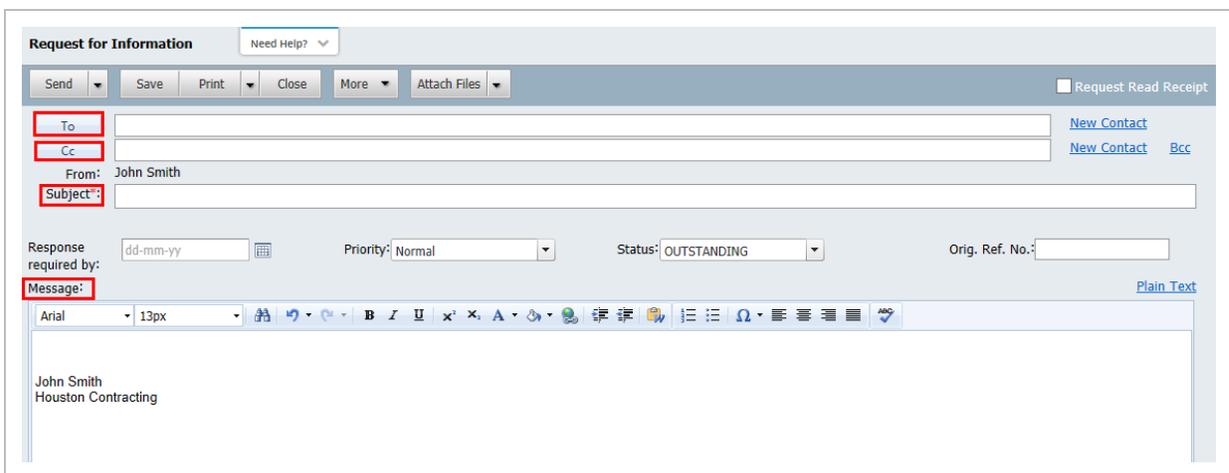
The InEight Document registers (mail and transmittals) are displayed below the Project folder within the InEight Document set of folders as shown above.

4.1 CREATING NEW INEIGHT DOCUMENT MAIL

1. From the InEight Document tab within Outlook click **New Item** or **InEight Document New Item** from the Home tab.
2. Select the Project, choose **Mail** then select the mail type from the drop-down list. This opens the mail compose screen as you would see it in InEight Document.



3. To add recipient(s), select the “To” and “CC” button or begin typing contacts names and select from suggested users.



4. Create and send mail as per normal in InEight Document.

NOTE Recipient contact details are from the InEight Document Project Address Book and not from the Outlook Address Book.

4.2 MANAGING MAIL WITHIN OUTLOOK

To open Outlook Integration mail with the same formatting and fields available as in InEight Document, select the mail in the register and click the **Open Item in InEight Document** button.

To reply to a InEight Document mail from within Outlook, select the InEight Document mail item you wish to respond to and open it. Then click the **Reply** button and select from the list of mail types to use for your reply as normal.

To change the Status of a Mail: Select mail item(s) from the appropriate inbox and then click the **Change Mail Status** button from the InEight Document tab and update as required.

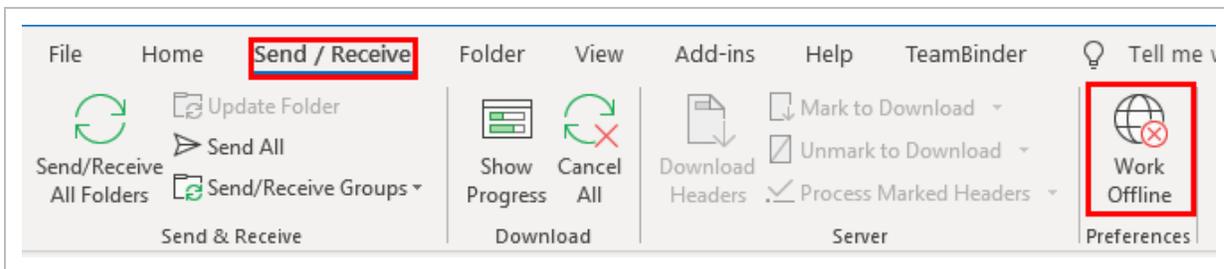
To do a Send and Receive refresh between Outlook and InEight Document click the **Send/ Receive All** button.

4.3 OFFLINE ACCESS AND MAIL CREATION

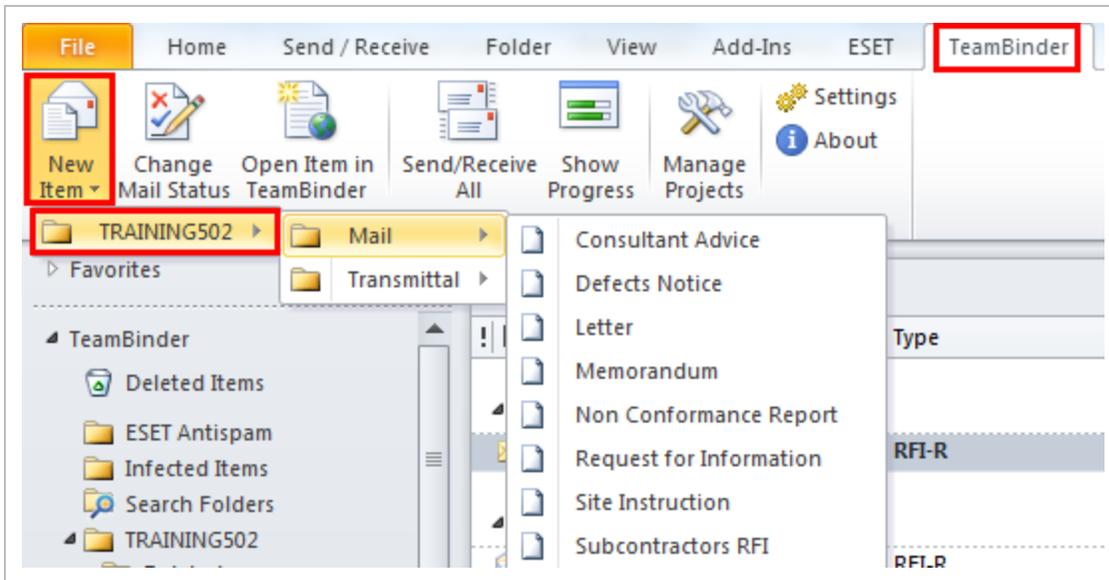
If there is no internet connectivity or Outlook is in offline mode, new mail cannot be sent or received from InEight Document. However, existing mail already synchronized with Outlook can be accessed and offline drafts created (although not with the InEight Document specific fields) and stored in an offline folder. This draft is then sent through InEight Document once connectivity is regained and after the final draft is completed.

To draft mail offline:

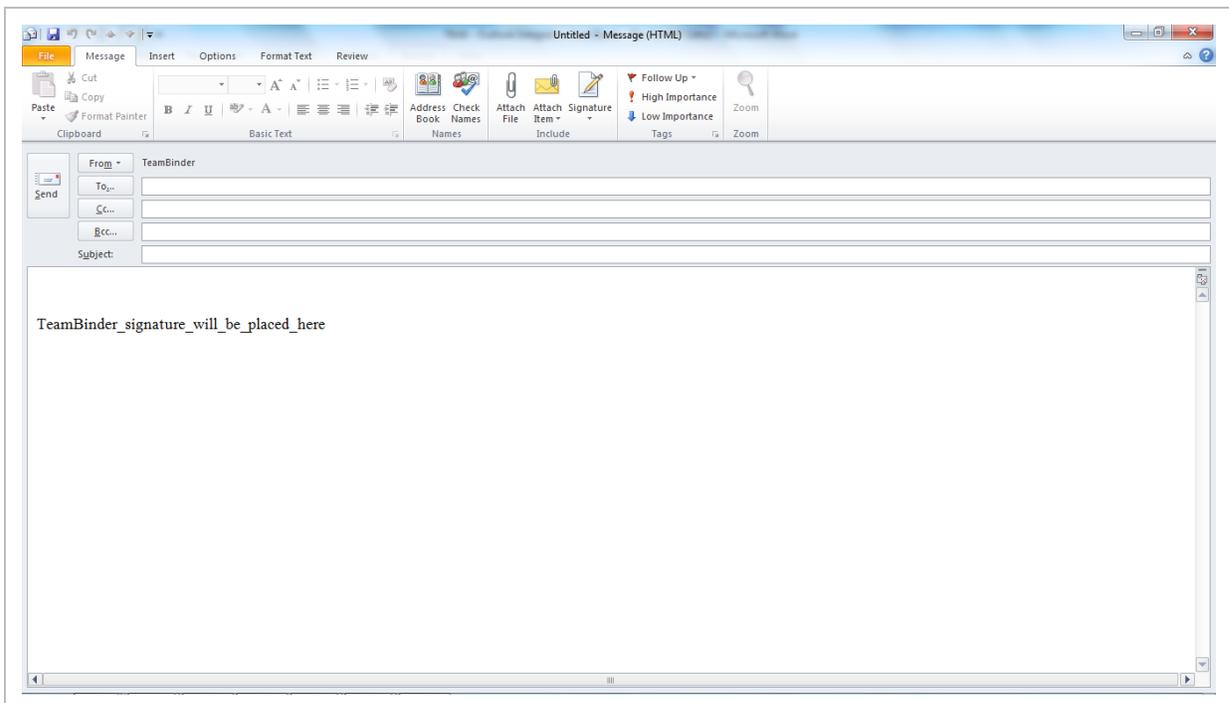
1. Select **Work Offline** mode from the Send/Receive tab.



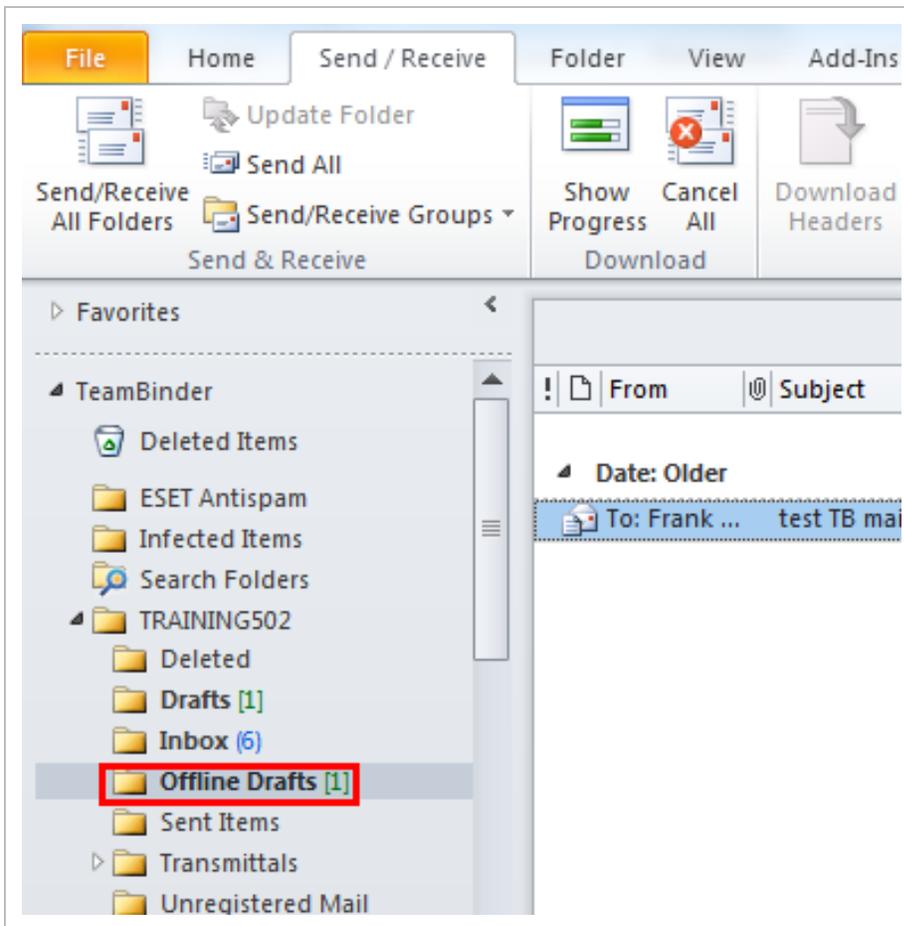
2. Click on the **New Mail** button.



3. Select a Mail type from the list.
4. Add the relevant details to the Mail.



5. Click the **Send** button.
6. A draft has now been saved in the Offline Drafts folder.



7. Reconnect by switching the **Work Offline** button off again.
8. Select the **Offline Drafts** Folder, open the draft mail item, complete any mandatory fields for that mail type and import into InEight Document.
9. The Draft will be synchronised with InEight Document and re-opened in Outlook with all the available InEight Document fields to be completed before sending.

4.4 IMPORTING OUTLOOK MAIL INTO INEIGHT DOCUMENT AS UNREGISTERED MAIL

Outlook mail can be dragged and dropped directly into InEight Document using the Outlook Integration Unregistered Mail folder. Mail remains Unregistered until it is processed, (ie all mandatory fields completed, and mail sent).

The Unregistered Mail folder appears below the Sent Items folder in Outlook and is available if users have personal access to the unregistered mail function in InEight Document.

4. The Mail will now appear in the recipient(s) InEight Document Inbox as well as their Outlook Integration InEight Document Inbox (if they have Outlook Integration).

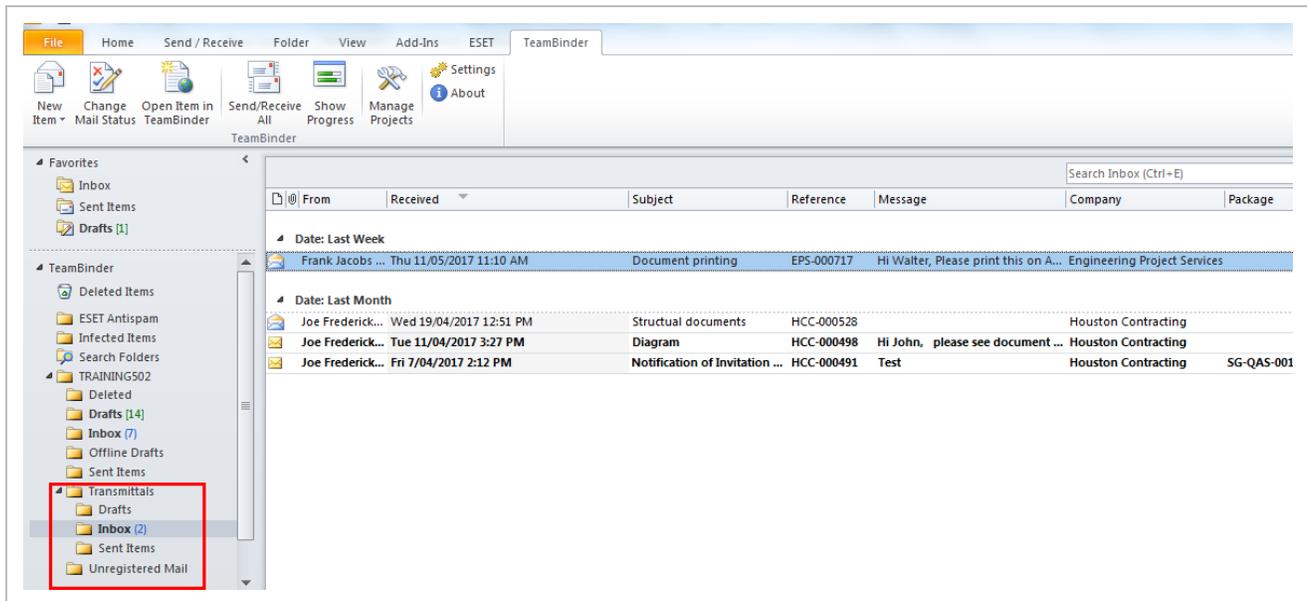
NOTE

- When an offline draft is being processed into InEight Document by the user, if recipient emails map to multiple contacts in InEight Document, the user can choose which contact should be selected.
- Outlook Integration will NOT move the original mail item.
- The unregistered mail folder will only appear in Outlook Integration if personal unregistered boxes are activated in InEight Document.

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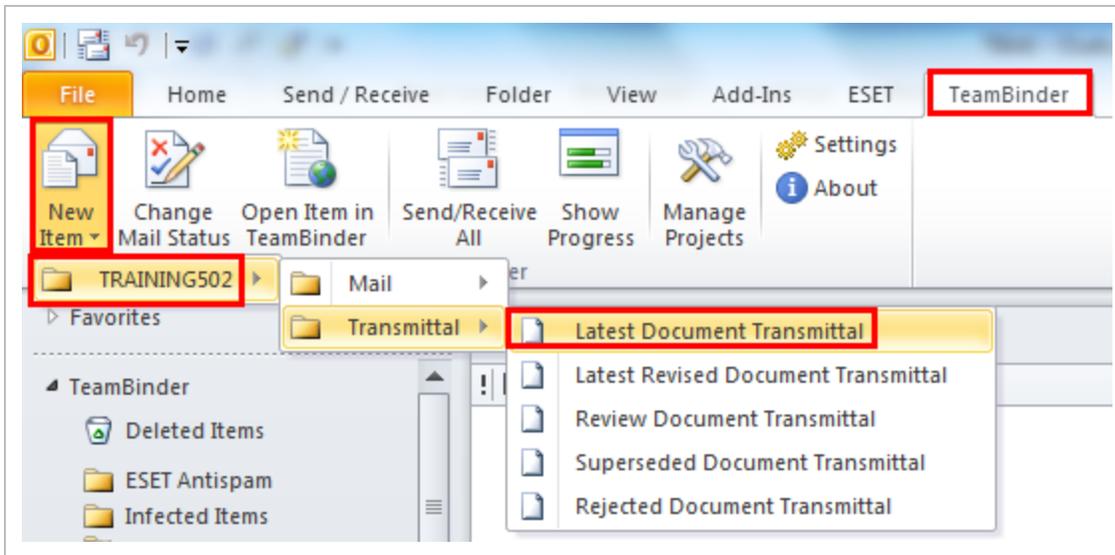
CHAPTER 5 – TRANSMITTALS

From the InEight Document Tab you can manage a number of InEight Document Transmittal functions using Outlook.

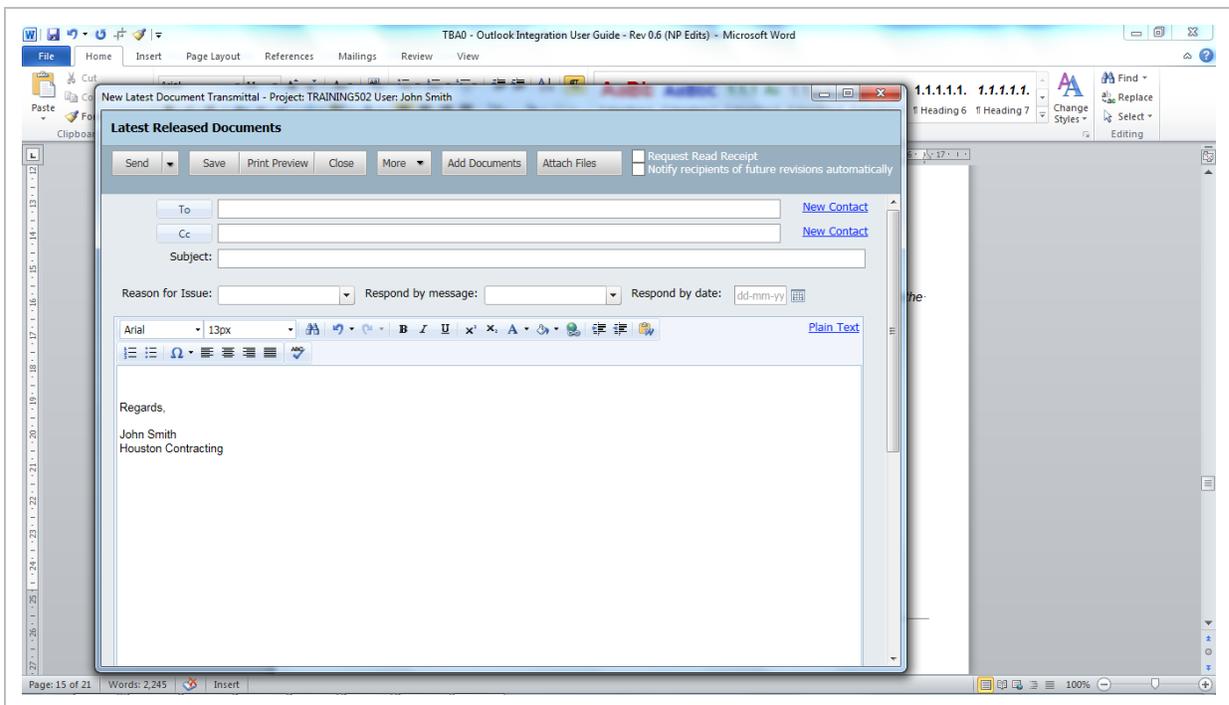


5.1 CREATING NEW INEIGHT DOCUMENT TRANSMITTALS

1. From the InEight Document tab click New Item or InEight Document New Item from the Home tab.



2. Select the Project, choose **Transmittal** then select the Transmittal type from the drop-down list. This opens the Transmittal compose screen as you would see it in InEight Document.



3. To add recipient(s), select the **“To”** and **“CC”** buttons or begin typing contacts names and select from suggested users.
4. Create and send Transmittal in the same way as if you were logged into InEight Document and using the normal Transmittal screen.

NOTE

- Recipient contact details are from the InEight Document Project Address Book and not from the Outlook Address Book.
- Use the **Open Item in InEight Document** button to open a transmittal from within Outlook with all the formatting and fields you would see if you were in InEight Document.
- To manage the Synchronization of Transmittal information between InEight Document and Outlook use the Enable Transmittals option from within the Manage Projects window. A subfolder for Transmittals is created under the Project folder in Outlook.

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CHAPTER 6 – SETTINGS

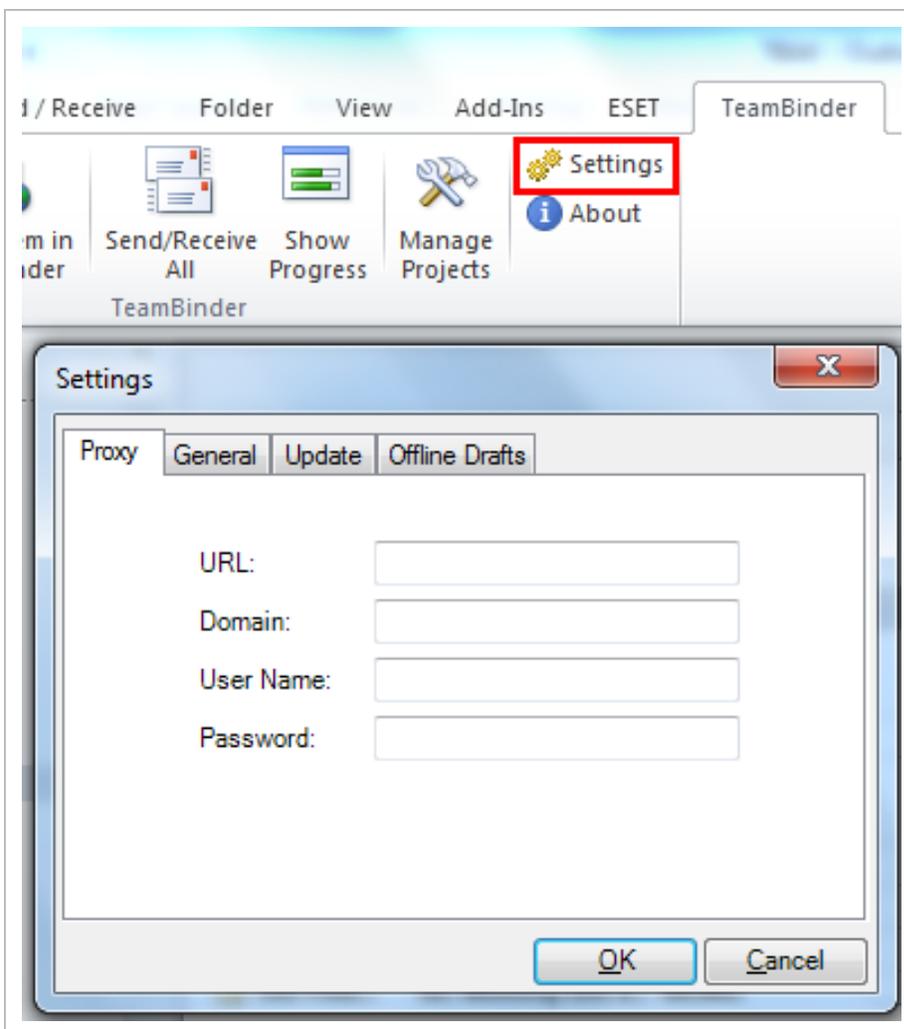
The InEight Document Outlook Integration settings window allows the user to modify settings on a personal basis. See setting options below:

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6.1 PROXY SETTINGS

This tab will allow you to set the proxy server settings to be used by InEight Document Outlook Integration when connecting to the InEight Document servers.

1. Click **Settings**.
2. Update Proxy settings (between the user's account and the internet) as required from the **Proxy** tab.



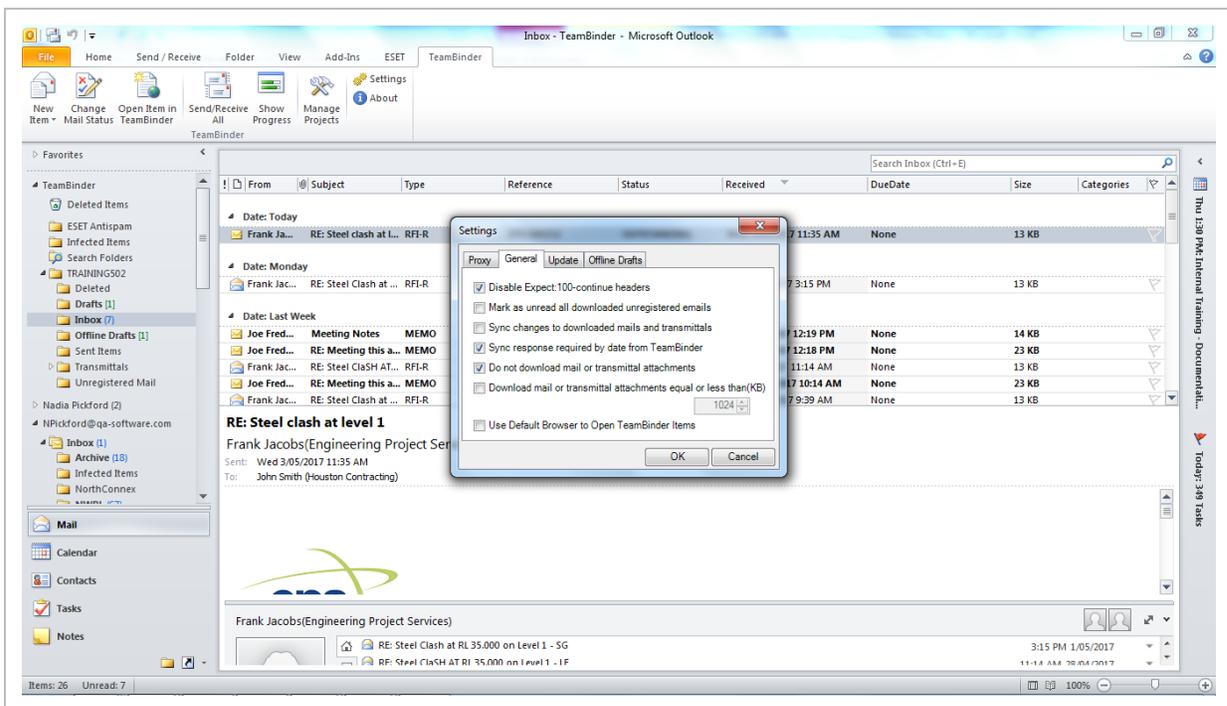
6.2 GENERAL SETTINGS

The following settings can be adjusted from this tab:

1. **Disable Expect: 100-continue headers** – Enable this option to fix connection issues between InEight Document Outlook Integration and the InEight Document server caused by the 100-expect-continue and keep-alive headers.
2. **Mark as Unread all downloaded mails** – All downloaded unregistered mails will be marked as unread when enabled.
3. **Sync Changes to downloaded mails** – if this is not enabled the status changes within InEight Document to previously downloaded mails will not be updated in Outlook.
4. **Sync Response required by date from InEight Document** – If ticked this will enable the

“Response Required By” date in Outlook. (This is ticked by default).

5. **Do not download mail or transmittal attachments** – Does not download any attachments in Outlook.
6. **Download mail or transmittal attachments equal or less than (KB)** – Will only download attachments equal or less than a specified size.
7. **Use Default Browser to Open InEight Document Items** – When setting is enabled, and an internet connection is available, items opened in InEight Document (by using “Open in InEight Document” button) will be opened as a new window/tab in the user’s default browser.

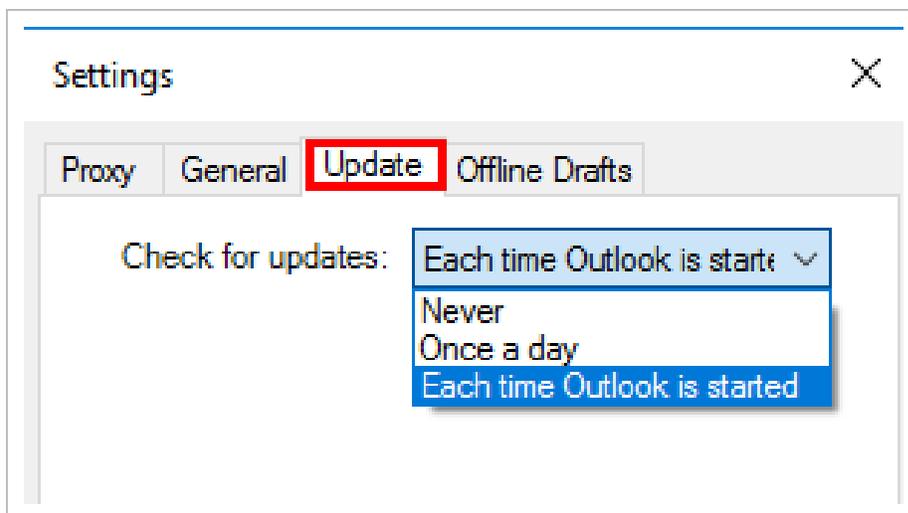


6.3 UPDATE SETTINGS

Settings in this tab control the frequency that Outlook Integration checks for updates.

This tab gives you the following update options:

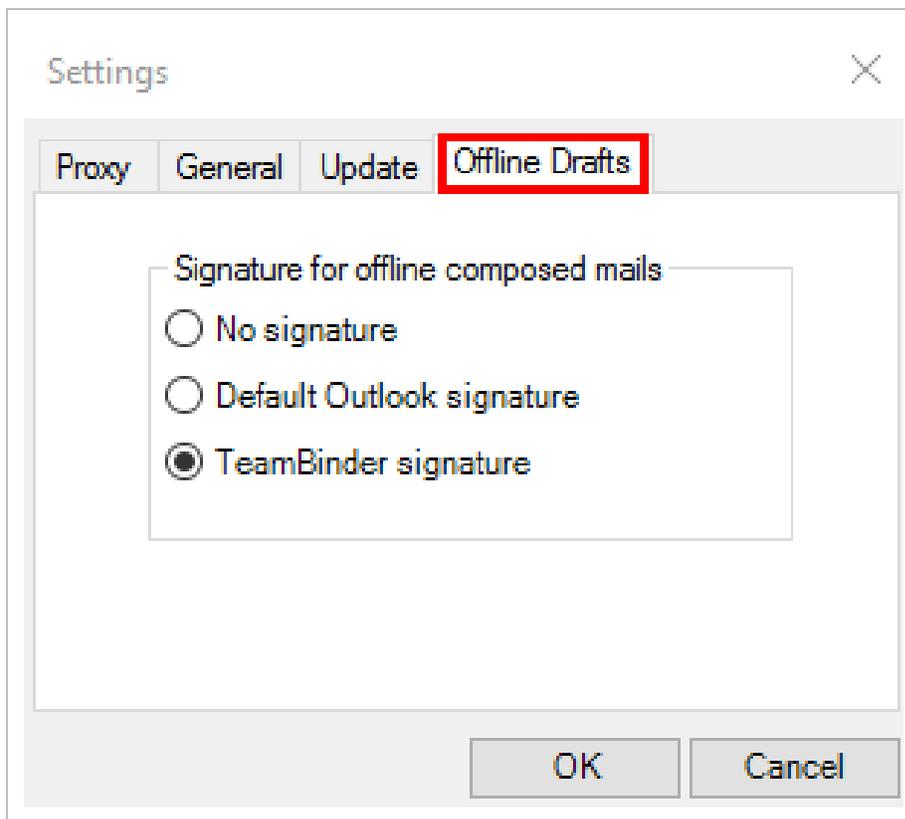
1. **Never** – does not allow you to update Outlook when it becomes available.
2. **Once a day** – will update once a day to check for updates.
3. **Each time** – will update every time there is a new Outlook versions available.



6.4 OFFLINE DRAFTS

This tab provides the following options for inserting a signature while drafting mail offline:

1. Include no signature.
2. Use the default Outlook signature
3. Use a InEight Document signature associated with the InEight Document user.



6.5 REMOVING A PROJECT

1. Select **Manage Projects** from the InEight Document tab.
2. Tick the check box for the project you wish to remove.
3. Click **Remove** then **OK**.

