
LOTS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT 

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CHAPTER 1 – INTRODUCTION TO LOT MANAGEMENT

Lot Management assists with the construction management of discrete portions of work to be completed. A Lot typically is defined as a day's production (i.e. finite portion of homogeneous work that can typically be completed within a day).

Online access to a Lot register within InEight Document from the field and site offices helps facilitate the efficient processing of the documentation associated with a Lot and status management as the works in a Lot proceed.

In addition, a number of Lot related reports help monitor progress to achieve close-out on schedule.

1.1 FEATURES AND BENEFITS OF INEIGHT DOCUMENT LOTS MODULE

Features	Benefits
Create and open Lots and Sub-Lots within a project-specific Lot structure.	Easily find and access all documents related to a Lot in one place.
Link RFI's, ITP's, Test Plans, Hold Points, Witness Points and NCR's to Lots.	Maintain a fully auditable history of all activities related to Lots and Sub Lots.
Add supporting documents to Lots such as completed inspection checklists.	Quickly navigate and access documents using a custom Lot structure.
Update Lot status, capture Lot details and define and control management responsibilities for each lot.	Easily monitor project progress, activities and responsibilities using project Lots.
Summary and detailed Lot Management reports.	Powerfully filtering allows the dynamic sorting and grouping of Lots with ease.
Manage Security at a granular level and define Lot Status workflow.	Ensure field processes around the Lot's lifecycle are being reflected in the system.

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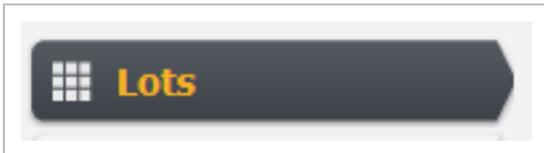
CHAPTER 2 – LOT MANAGEMENT

The steps below assume you are familiar with the general use of the InEight Document System. All steps below start from the InEight Document Dashboard.

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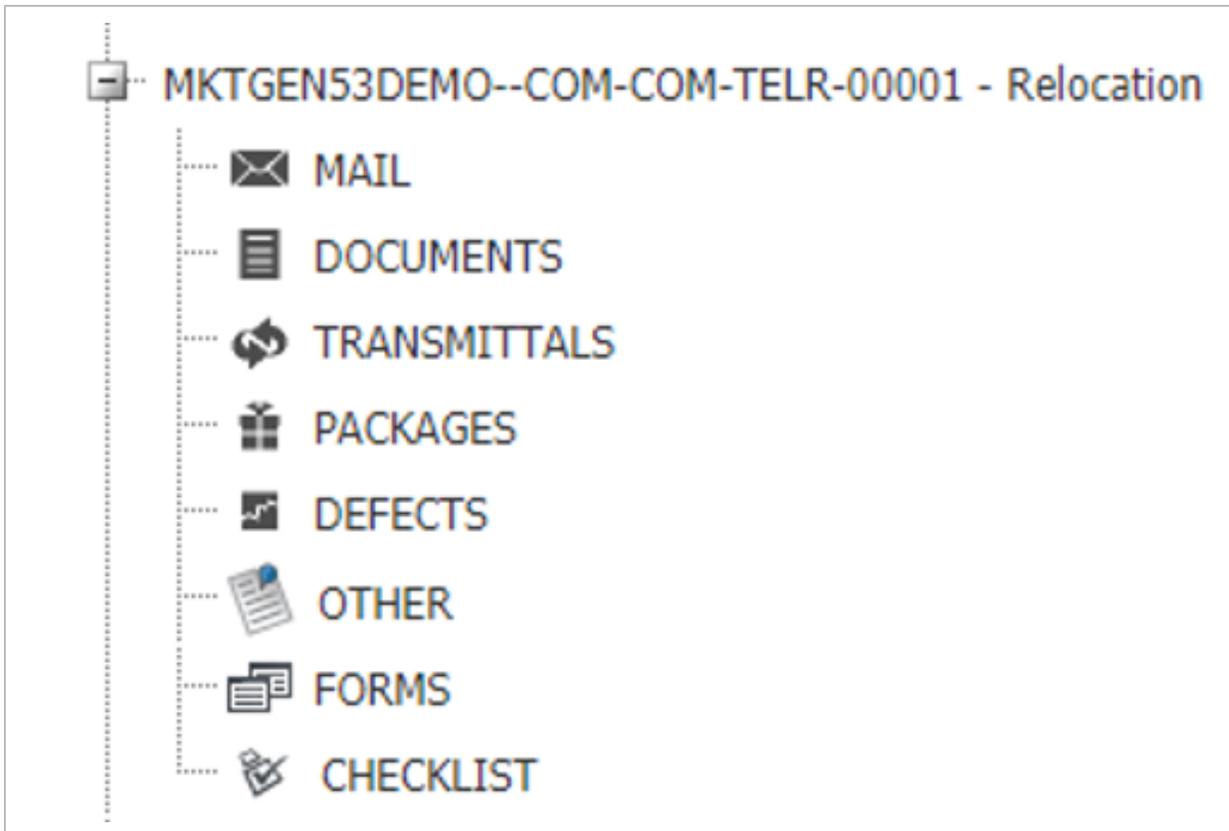
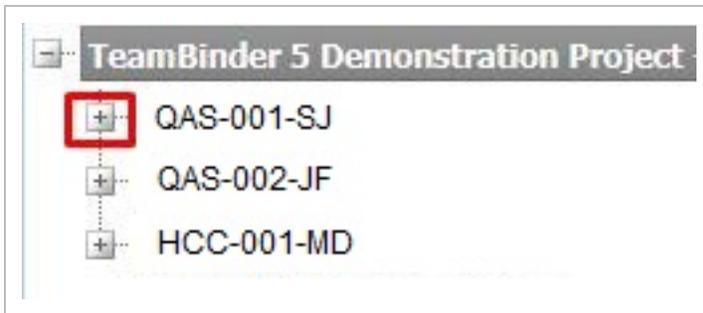
2.1 NAVIGATING WITHIN LOTS AND SUB LOTS

1. From the Left Hand menu, click on the Lots module.



If you do not see this module, contact your Project Administrator or the InEight Document Support Hotline.

2. Open the Lots structure by clicking the  expand icon against the Project Title and then the  expand icon against a Lot to access all Sub Lots belonging to it.



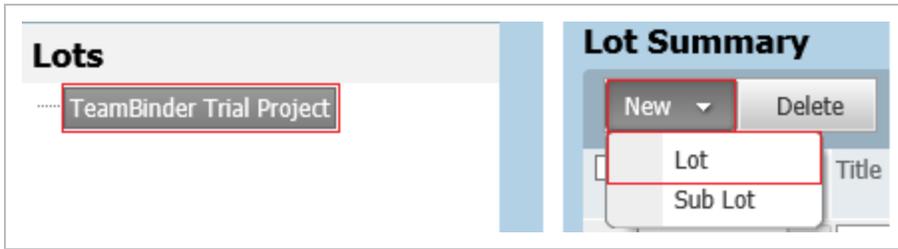
3. Mail, Documents, Transmittals, Packages, Defects, Forms and Checklist items can be assigned to a Lot. These can be accessed by clicking on the modules listed under each Lot/Sub Lot.

2.2 LOT CREATION

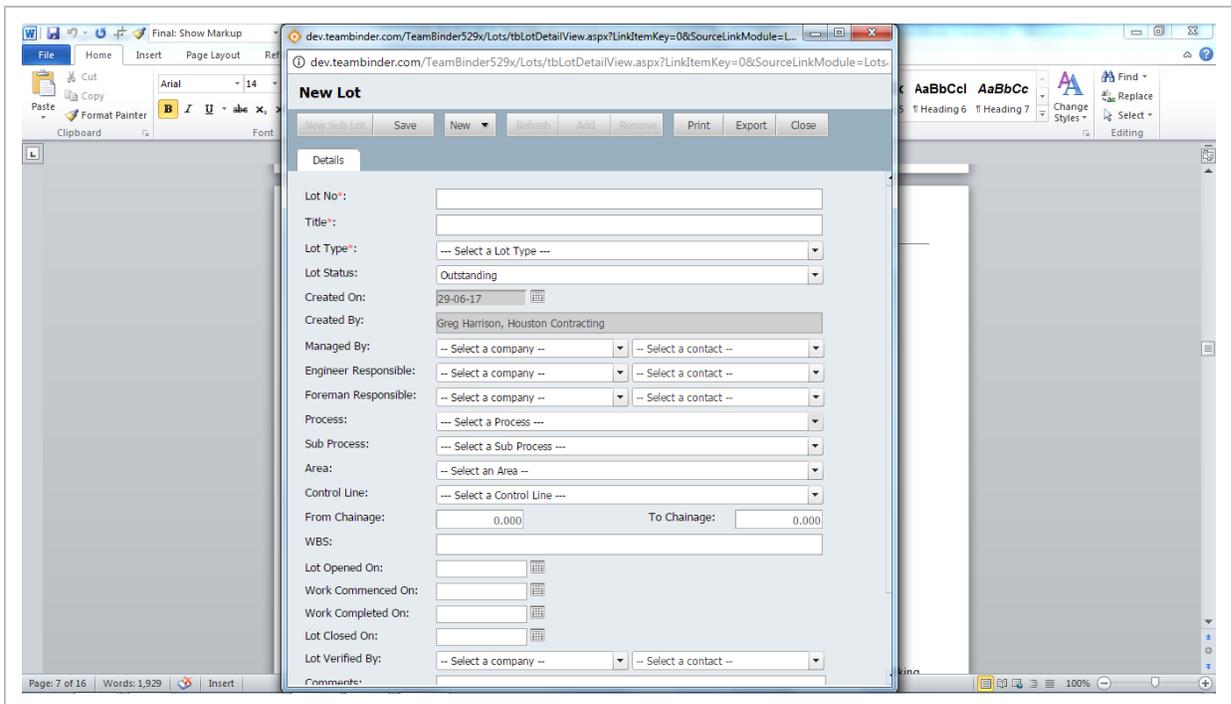
To create your first Lot:

1. Select **Lots** from the left hand menu.

- Click on the **New** button from the register and select **Lot**.



- Within the **Details** tab, complete Lot details, then click the **Save** button.



NOTE Certain dropdown fields can be made mandatory through the configuration tables. The red asterisks denote the mandatory fields within the Lot details screen.

2.3 SUB LOTS

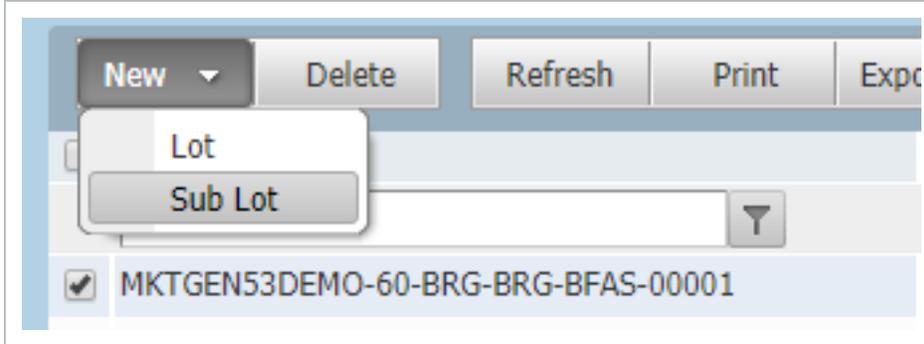
Sub Lots are typically used to break larger Lots further into smaller sub segments.

For example, a Bridge that is a Lot may be broken into smaller Sub Lots such as Piers, Abutments, Decks and Girders.

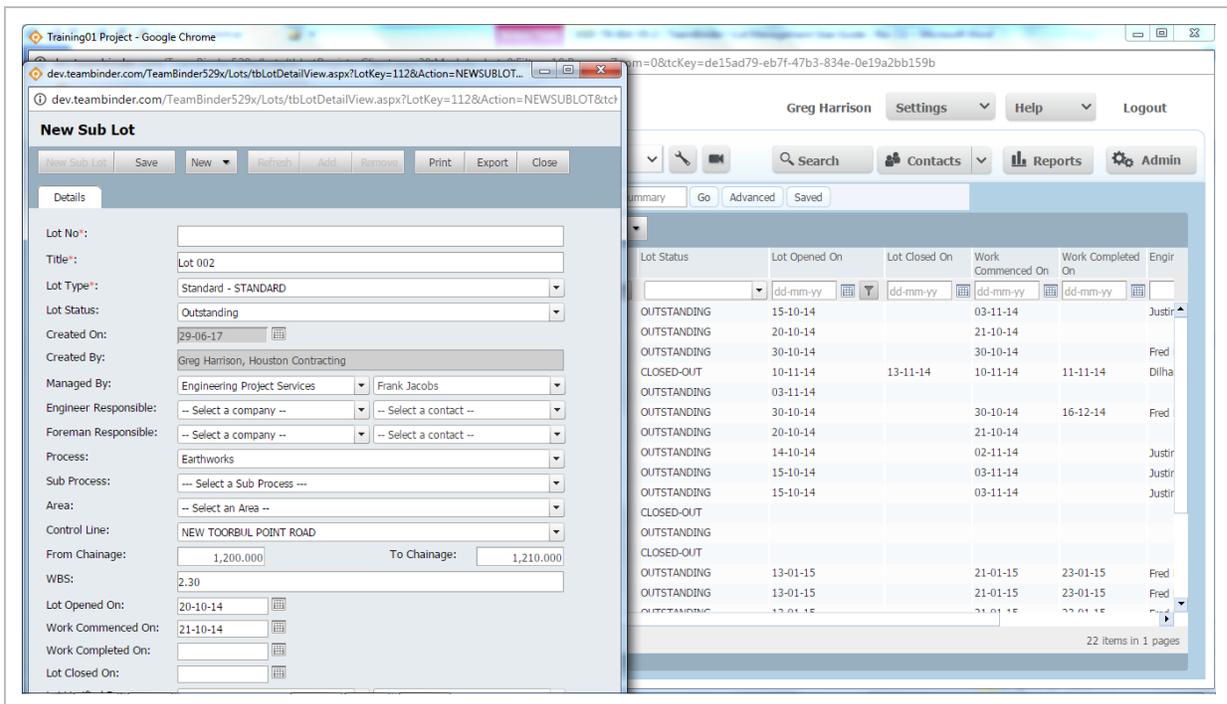
There is no limit to the number of Sub Lots that can be created under a Parent Lot.

2.3.0.1 To create a Sub Lot:

1. From the Lot list, select the Parent Lot then select using the **New** button above the Details tab select Sub Lot.



2. Complete the new Sub Lot details and click the Save button.

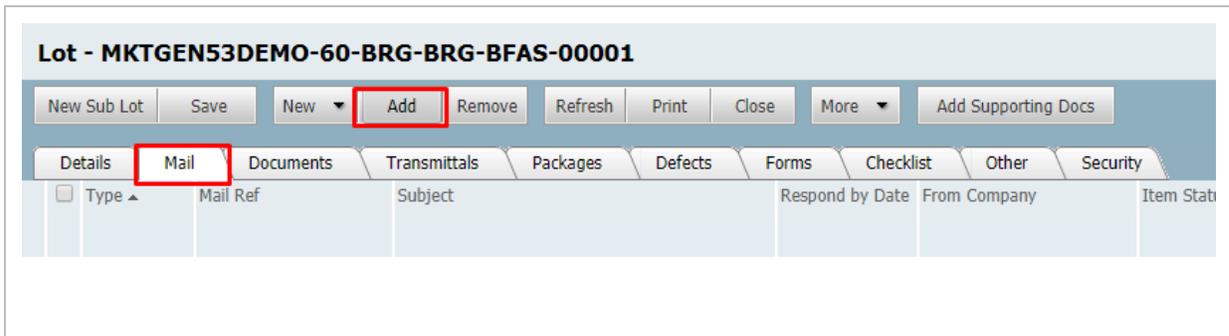


2.4 ADDING NEW ITEMS TO A LOT

Mail, Documents, Transmittals, Packages, Defects, Forms and Checklist items can be assigned to a Lot. These can be accessed by clicking on the modules listed under each Lot or Sub Lot and then opening the relevant tab.

2.4.1 Adding Items to a Lot

1. Double click on the required Lot / Sub Lot then select the modular tab from the top of the lot screen (e.g. Mail)



2. Click **Add** from the top menu.
3. Apply search criteria to identify and assign related items.
4. Select required items then click **OK**.

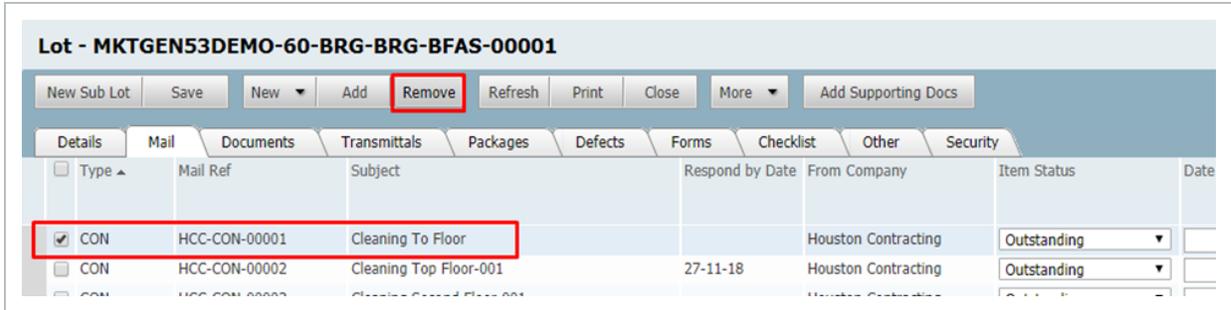
NOTE

- Any item filed within the Lot will illustrate a status within the Lot – this is specific to the Lot and can be used to illustrate progress of that item.
- Once items are added to Lots, they become accessible within the Lot according to existing access rules. For example, attached mail will be visible to those users with access to this type of Lot and Sub Lot as long as they would otherwise have access to this mail in the register (being the sender/recipient of the mail or having company access to the mail).

2.4.2 Removing Items from a Lot

Once an item has been associated with a Lot it can also be removed if required.

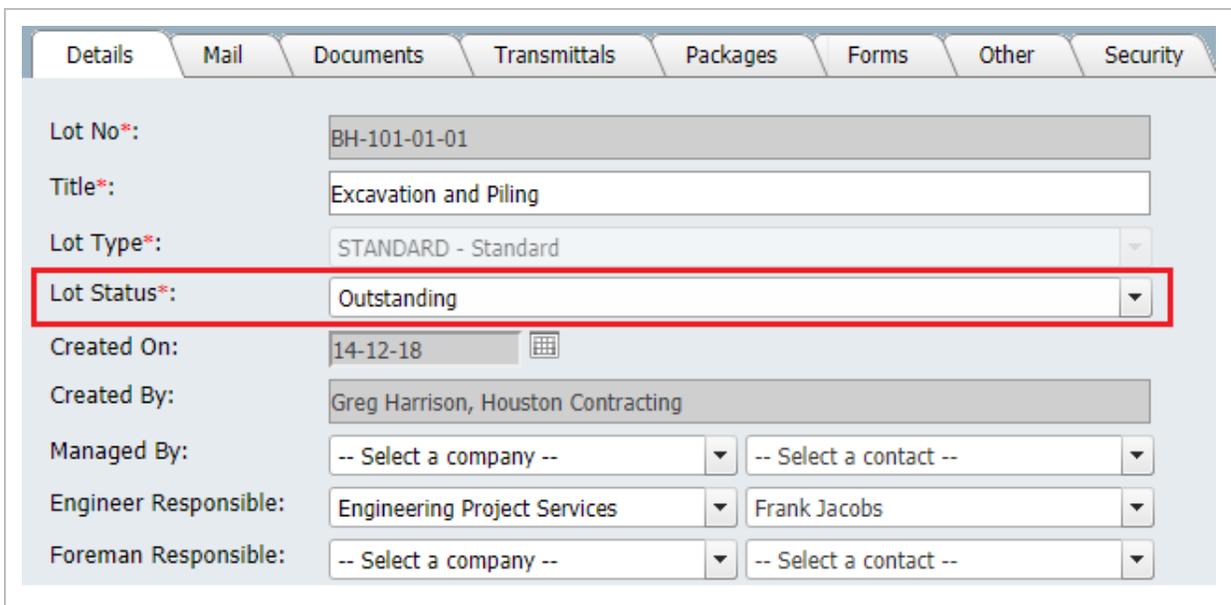
1. Select the items to be removed from the relevant section of the Lot (e.g. Documents).
2. Select the **Remove** button from above that section then click **OK**.



2.5 LOT STATUS

Lot status is managed from the **Details** tab of the relevant Lot. To update the status:

1. Select the relevant Lot or Sub Lot.
2. Update the Lot Status from the Details tab.



3. Click **Save**.

NOTE

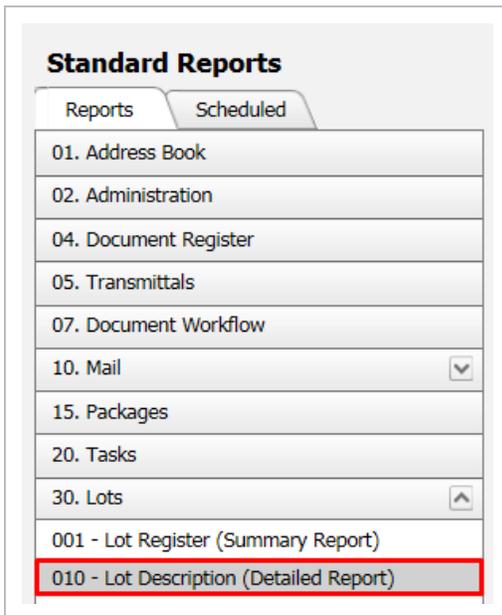
- The Lot Status is displayed in the Lot register via the “Lot Status” column.
- User may be prompted with a message when attempting to change the “Lot Status”, to closed out as below if all items stored within the Lot are not closed out.

2.6 LOT REPORTS

InEight Document provides Lot Management reports to allow reporting across Lot activities, Lot closures etc.

2.6.1 To run a report on a Lot:

1. Select the **Reports** section of InEight Document.
2. Click **Lots** to expand the Lot group of reports.



3. Select the required report and enter filter criteria e.g. Lot Number, Process, Sub Process etc.

- For a detailed report, InEight Document will generate a report listing the items and their current status for each item, within the Lot.

Lot No	Sub Lot	Title	Opened By	Status	Lot Opened On	Lot Closed On	Comments
DRA-DRA-SUBS-0001	DRA-DRA-SUBS-0001	Subsoil under Williams Landing overpass		CLOSED-OUT	15-04-15	16-04-15	

Mail							
Type	Document No	Subject	Rev	Sts	Item Staus	Due by Date	Date Closed
SD	SD-00024	Test 3 - Comments in 11 General Comments			OUTSTANDING		

Documents							
Type	Document No	Subject	Rev	Sts	Item Staus	Due by Date	Date Closed
	QA-0001	Test Result 01	-	IFI	OUTSTANDING		
	SITEDIARY-001	Site Diary Video	-	IFI	OUTSTANDING		

Supporting Documents							
	Title		File Name				
	A-DOC001-IFI		A-DOC001-IFI.pdf				

Other							
Type	Document No	Subject	Rev	Sts	Item Staus	Due by Date	Date Closed
	Bella Vista.jpg	Bella Vista			OUTSTANDING		

Total Items: 4

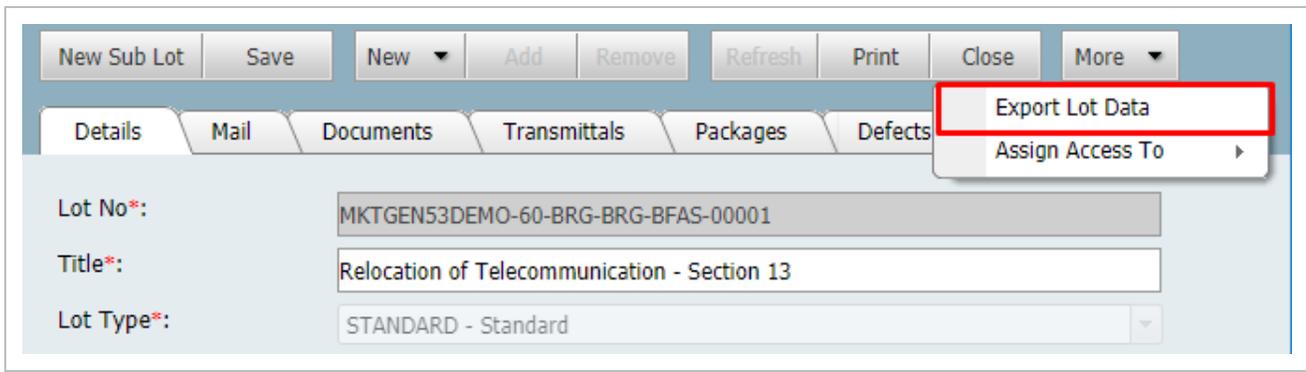
NOTE Use the online Help accessed via the Help button at the Dashboard, to find out more about scheduling reports and printing reports to an Excel, PDF and Word document.

2.7 EXPORTING LOT META DATA

It is possible to export all files (Mail, Documents, Transmittals, Packages, Defects, Forms and Checklist and attachments) related to a single lot to zip file from within the Lot details window by clicking the **Export** button.

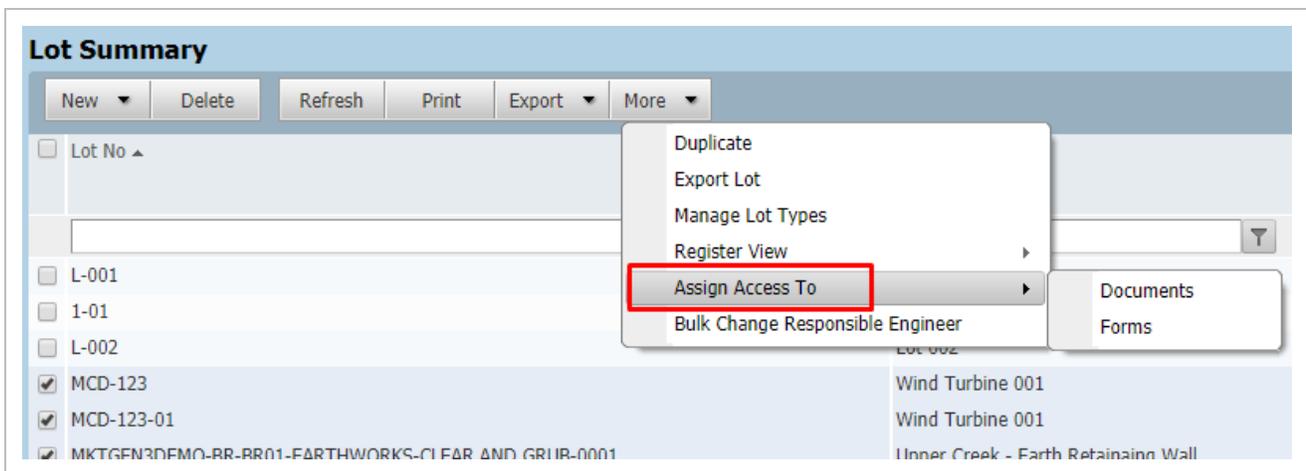
The Lot export will allow all data within a lot to be exported into a Zip file. This is typically used as part of handover documentation for example, to the client.

All information in the Lot will be exported into PDF (mails included) – including attachments. Items will be named by the reference number applied within the system and a lot summary will also be exported – Lot number, status, title.

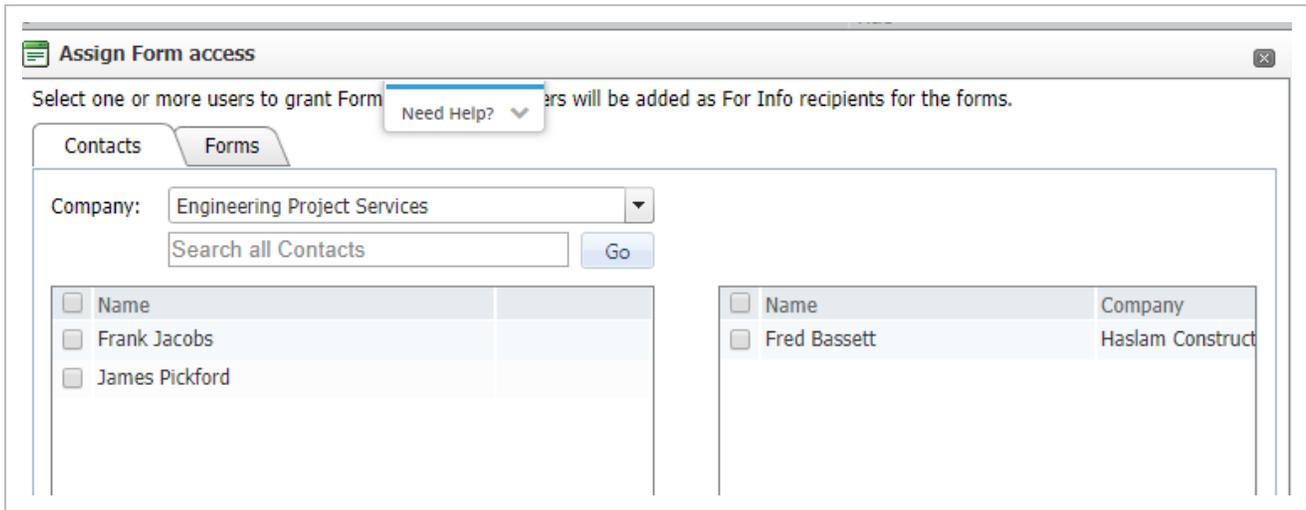


2.8 ASSIGN ACCESS IN BULK TO FORMS AND DOCUMENTS

During the life of the project if a user requires access to the Documents and Forms associated with the Lot this can be granted through the Assign Access To option available in the More Menu

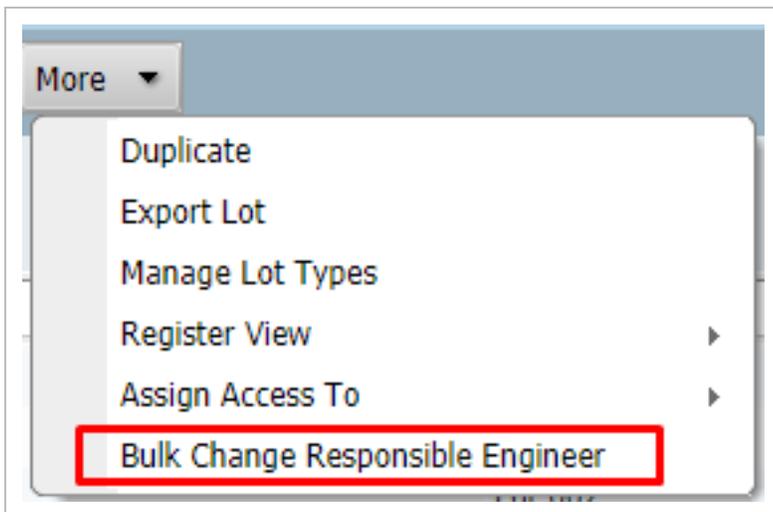


In the case of documents access will be granted through the Assign Document Access function. In the case of Forms all users added will be added as For Info recipients



2.9 BULK CHANGE RESPONSIBLE ENGINEER

Lots are frequently reassigned to engineers – this can be achieved through the More > Bulk Change Responsible Engineer function.



 **Bulk Change Responsible Engineer**

Engineer Responsible:

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CHAPTER 3 – LOT ADMINISTRATION

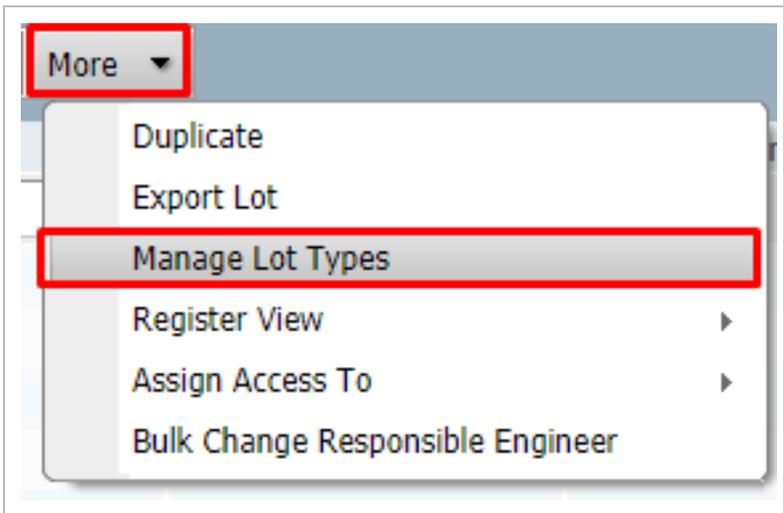
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3.1 CREATING AND MANAGING LOT TYPES

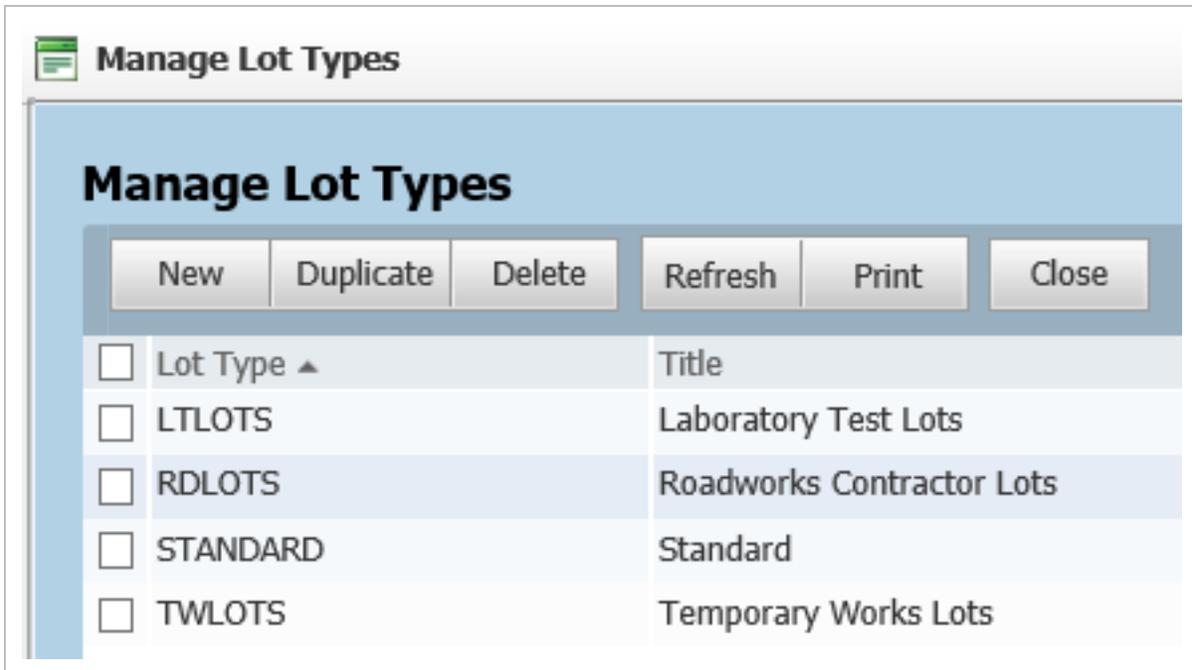
User access to Lots is controlled at a Lot Type level.

To create Lot Types and assign/manage the users who can access each Lot Type:

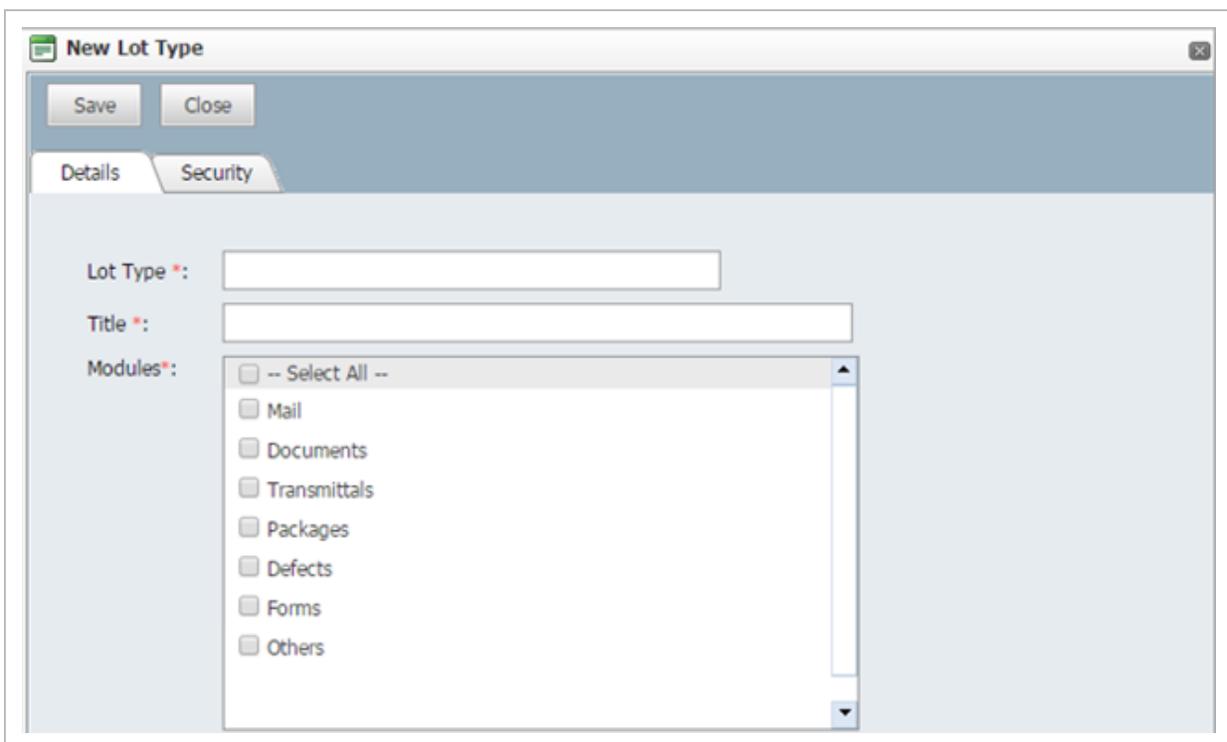
1. Click the **More** button from within the Lots Register then select **Manage Lot Types**.



2. Choose **New** to create a new Lot type.

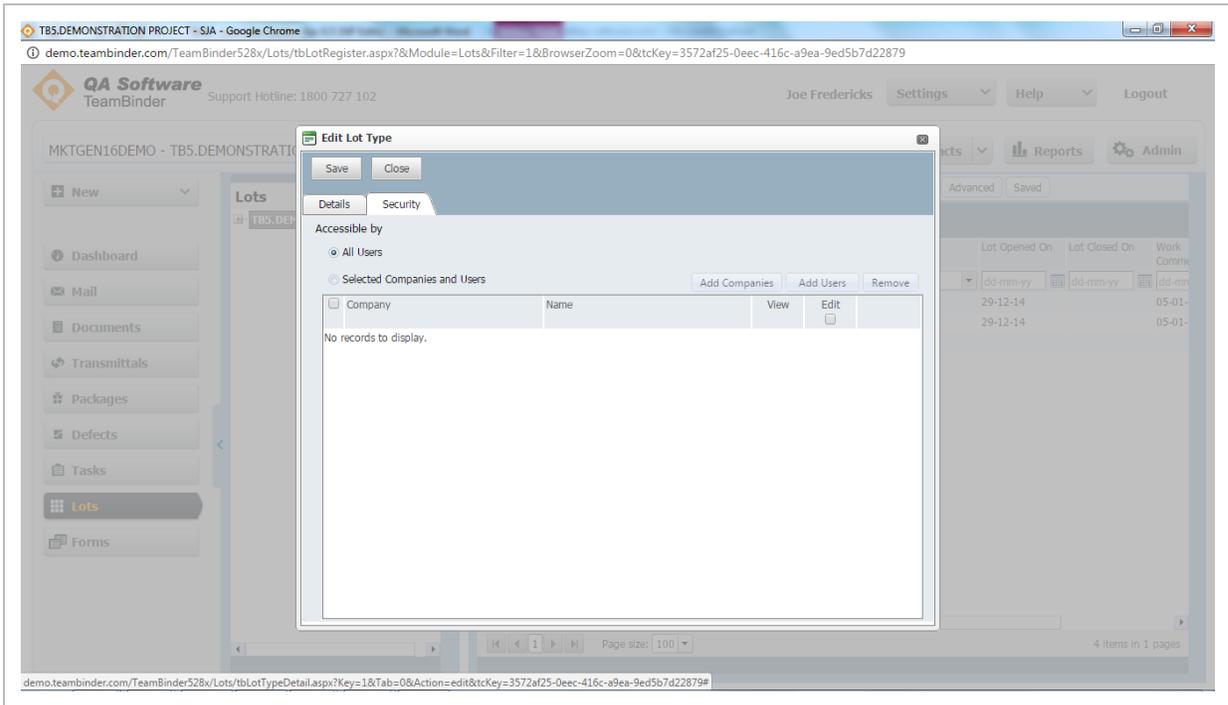


- Next, within the Lot Types window, enter the **Lot Type**, **Title** and select the **Modules** to be included for that specific Lot Type then click the **Save** button.

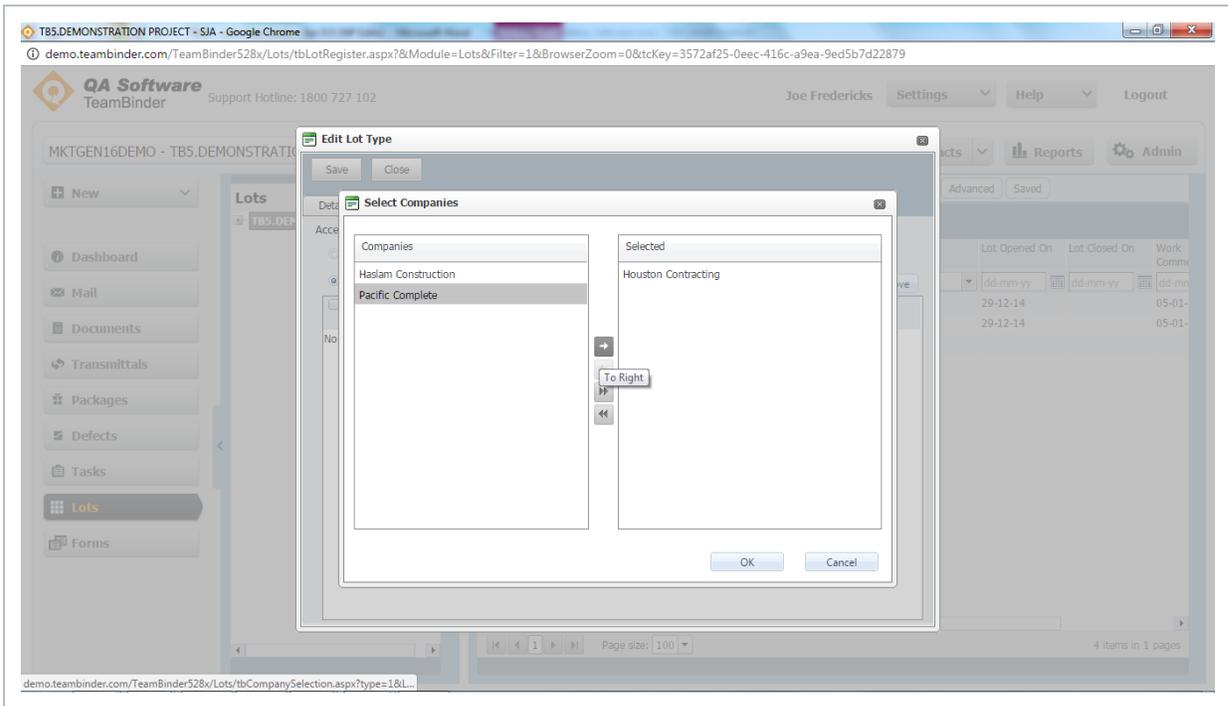


- Click on the **Security** tab to manage user access to the Lot Type.

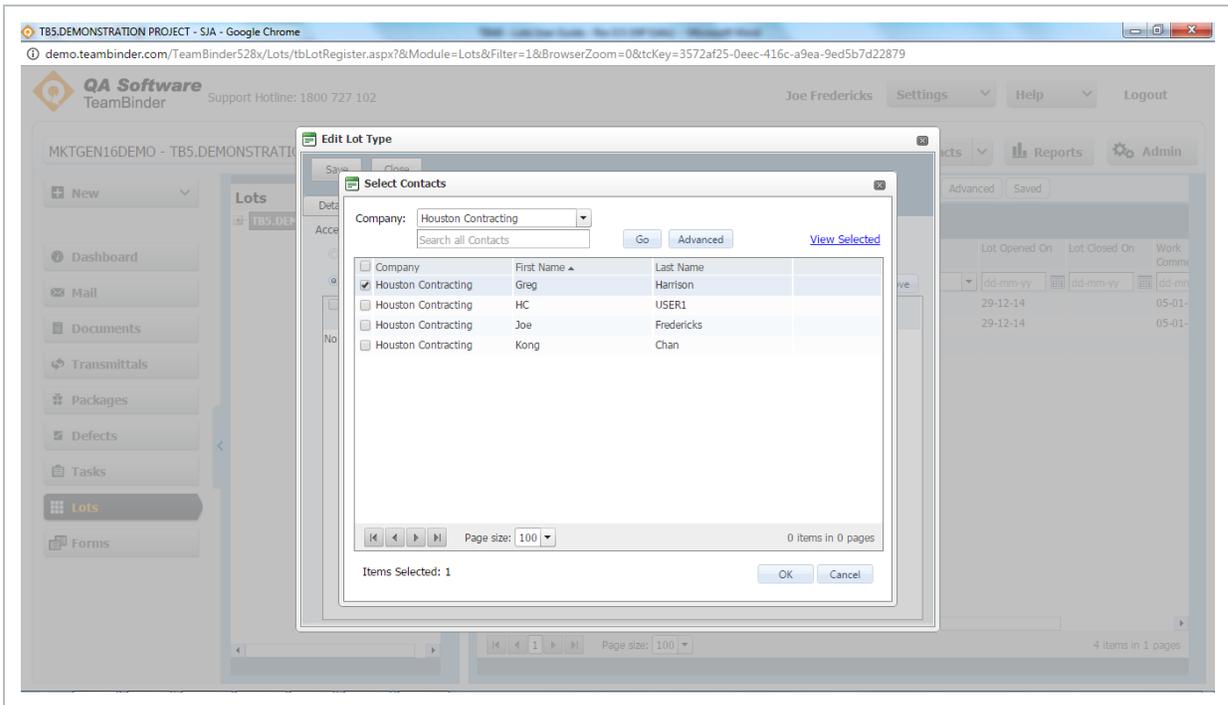
5. Select **All Users** to give all users on this project view this Lot Type (subject to personal and security group settings in relation to lots in general).



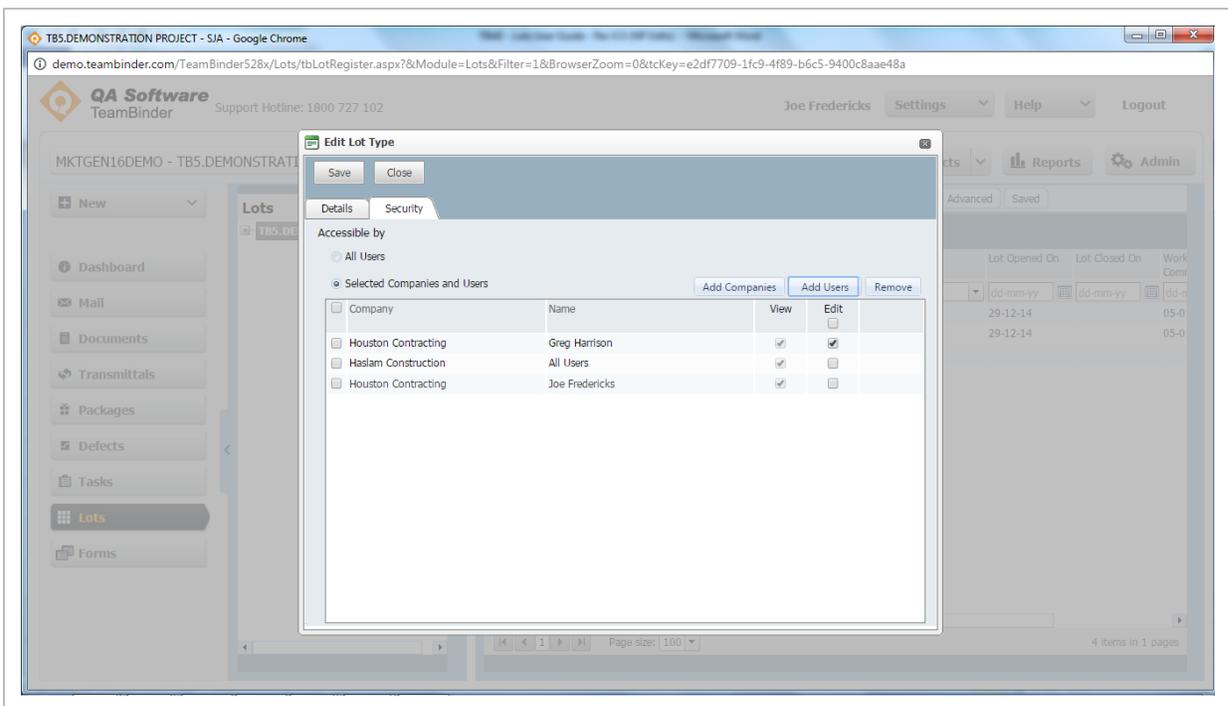
6. Alternatively chose the **Selected Companies and Users** option then click the **Add Companies** button (which will become enabled) to grant access to this Lot Type by company.



- Click the **Add Users** button to select the users to have access.



- Back at the **Edit Lot Type** window, click the **Edit** option against any company and/or user who will need permission to make changes to this type of Lot. View access is granted here by default.



9. Click **Save** once complete.

NOTE

- Access to Lot Types can be defined as “view” or “edit” at an individual or Company level from the Manage Lot Types section of InEight Document.
- The Edit option will allow the users / companies to update Lot information such as information on the Lot page (based on their user security) and add / remove items that have been added to the Lot.

3.2 LOT SECURITY SETTINGS

In InEight Document, access to Lots can be managed at a User level, by Security Group, by Lot Type (see previous section) or by Project.

3.2.1 Help Topics:

3.2.2 Individual User Level Access

At an individual user level there are three levels of Lot module access available.

None: User will have no access to the Lots module.

View: Users can see the Lots module and Lot Types in accordance with the Security Group they belong to, but they cannot create new Lots or alter existing Lots.

Full: Users can create or alter existing Lots in accordance with the Security Group they belong to.

To provide a user with their individual level of access:

1. Click the **Contacts** at the InEight Document Dashboard and locate the required contact. Once located double click on them to open the User’s details.
2. Click on the **Security** Tab.

3. Select the Lots Module drop down and choose the appropriate level of access.

The screenshot shows a web interface for Security Group settings. At the top, there are four tabs: 'Details', 'User Security', 'Distribution Matrix', and 'Restricted Access'. The 'User Security' tab is active. Below the tabs, there is a 'Security Group:' dropdown menu set to 'Client'. A list of settings follows, each with a dropdown menu:

- Standard Mail: Company
- Unregistered Mail: Company
- Folders: Create, View & Allocate
- Document: Full
- Package: Full
- Transmittal: Company
- Published Report: Full
- Defects: None
- Tasks: None
- Lots:** Full (This dropdown is highlighted with a red box, and its menu is open showing 'None', 'View', and 'Full' options, with 'Full' selected and highlighted in blue.)
- Forms: Company

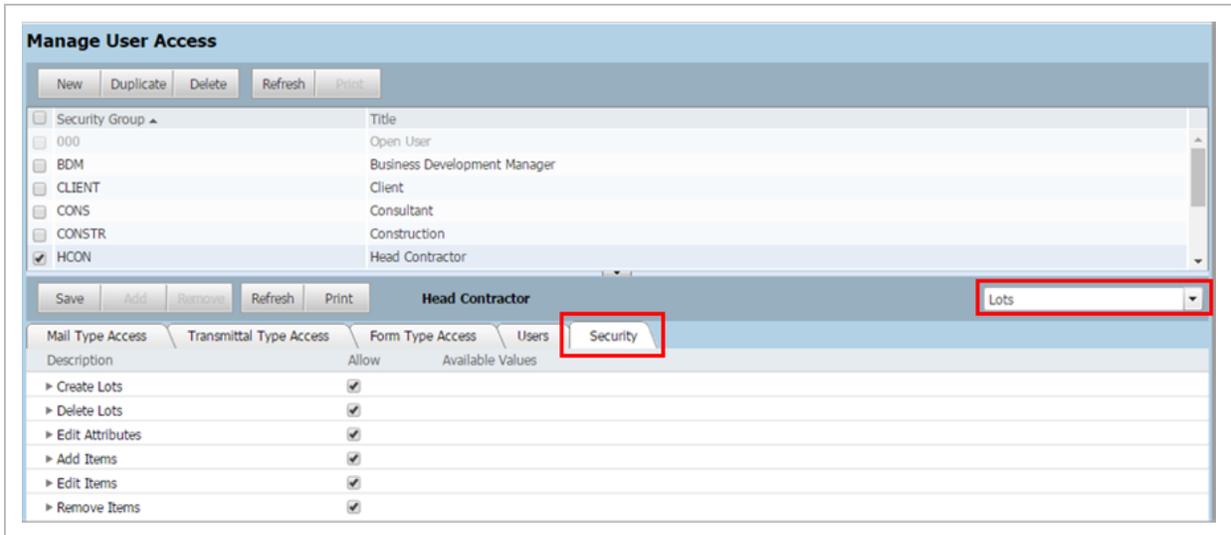
NOTE User Lot Access can also be defined from the User tab within the Security Group settings.

3.2.3 Security Group Level Access

For users with Full access to Lots, the specific actions they can take in regard to a Lot are managed via the Security Group they belong to.

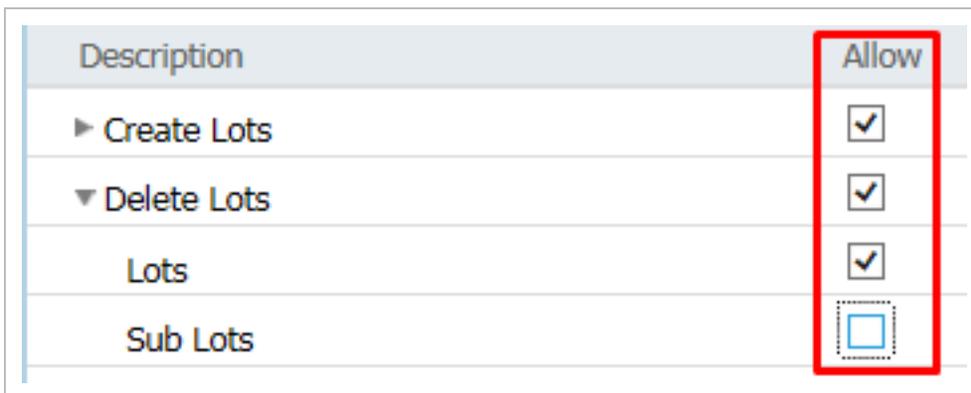
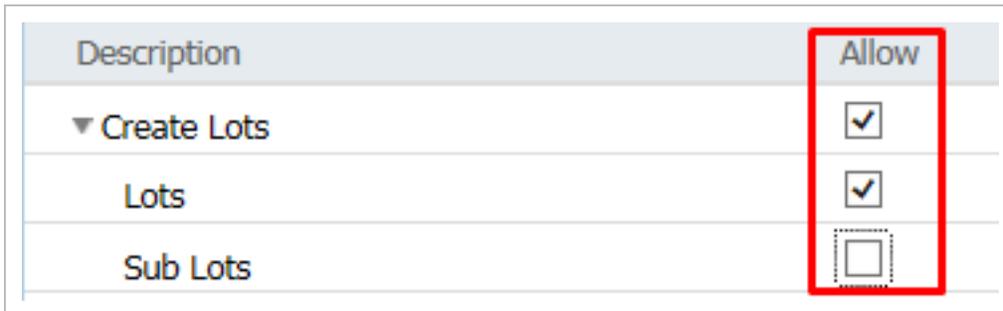
1. From the InEight Document Dashboard, click the **Admin** button and then the **Manage User Access** button and then choose the relevant Security Group.
2. Click on the **Security** Tab then choose **Lots** from the drop down list on the right hand side of the

window.



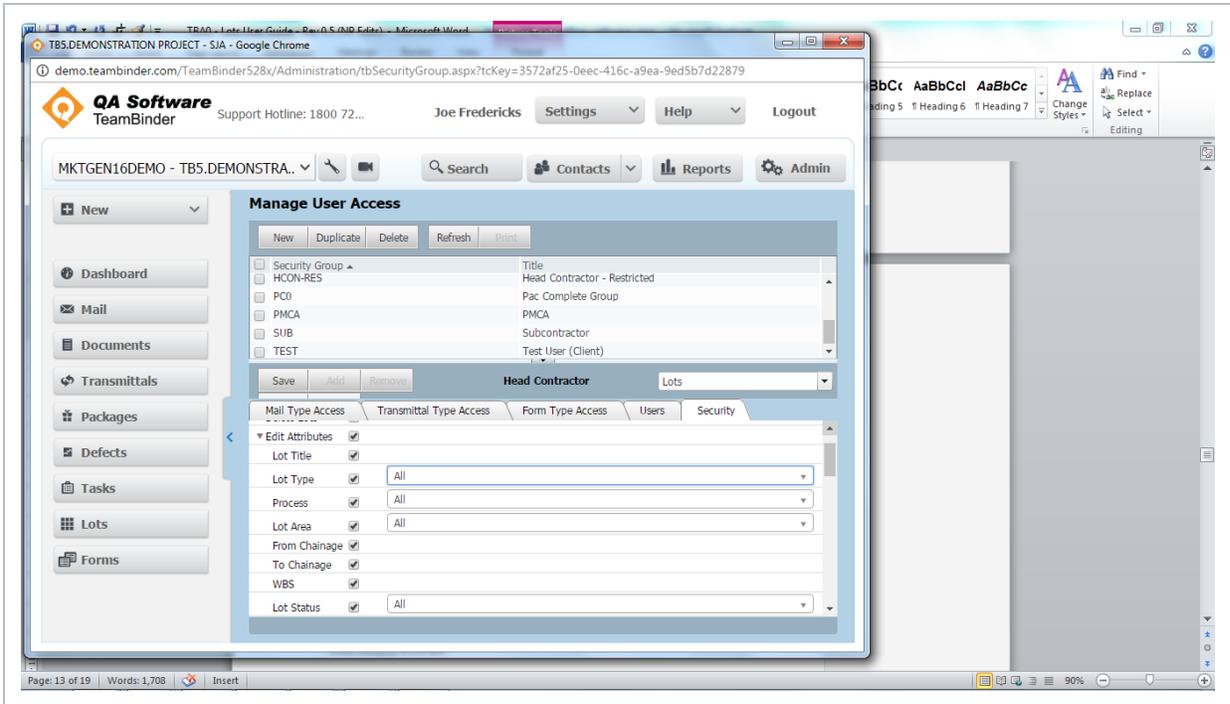
From here, controls can be chosen to define the actions that can be taken by users assigned to the Security Group.

3. Create or delete Lots and Sub Lots.



4. Edit Lot attributes including:

- Lot Title
- Lot Type (available Lot types can be specified)
- Lot Status (available Status values can be specified)



- Add, edit or remove items by module such as mail, documents or packages.



NOTE

- The ability to delete Lots can also be set at a Project level. If the Project setting is set to not allow Lot deletion, this would override the permission to Delete Lots if set at a Security Group level.
- If a module is deselected in this section, users will not be able to select the Lot information against that module, i.e. they will appear as greyed out.
- Additional custom fields may be available depending on project.

3.2.4 Project Level Settings

To set project-wide permissions for Lot deletion and set the default Lot Status, click on the **Project Settings** button at the Dashboard and then from within Project Settings click on the **Lots** group of options.

Lots

Allow deleting Lots

Allow Lot originator company users to modify Lot security

Default Lot Status Outstanding

Close-out all Lot items prior to changing the Lot Status to "Close-out"

If the **Allow deleting Lots** option is unticked, this overrides individual or group security settings. That is, no users will be able to delete Lots, regardless of their security settings.

The default Lot status can also be set. In this case, all Lots are **Outstanding** by default.

The project can also prevent users from changing a Lot Status to closed out if there are open items filed within the Lot. This will enforce closure of all items filed within the Lot prior to the status changing to closed

Details	Mail	Documents	Transmittals	Packages	Forms	Other		
<input type="checkbox"/> Type	Mail Ref	Subject	Respond by Date	From Company	Item Status	Date Closed	Due by Date	Supporting Doc Req
<input type="checkbox"/> SD	SD-00024	Comments in 11 General Comments			Outstanding			<input type="checkbox"/>

Lastly, there is also an option to grant users from the company that created the Lot the ability to modify and update the Lot Security. This allows a number of different users to grant access to the Lot to users from other companies, or even entire companies.