
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	5
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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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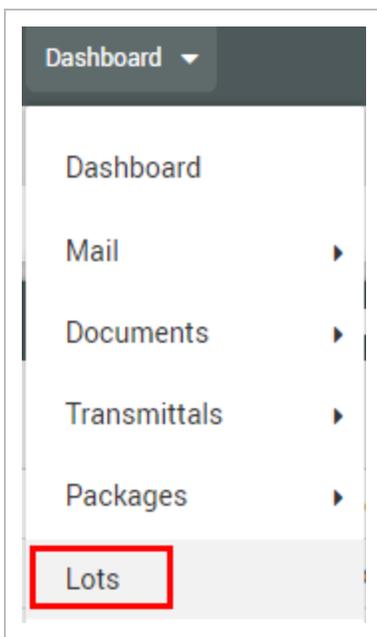
CHAPTER 2 – LOT MANAGEMENT

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.

- 2.1 Navigating within Lots and Sub Lots 7
- 2.2 Lot Creation 8
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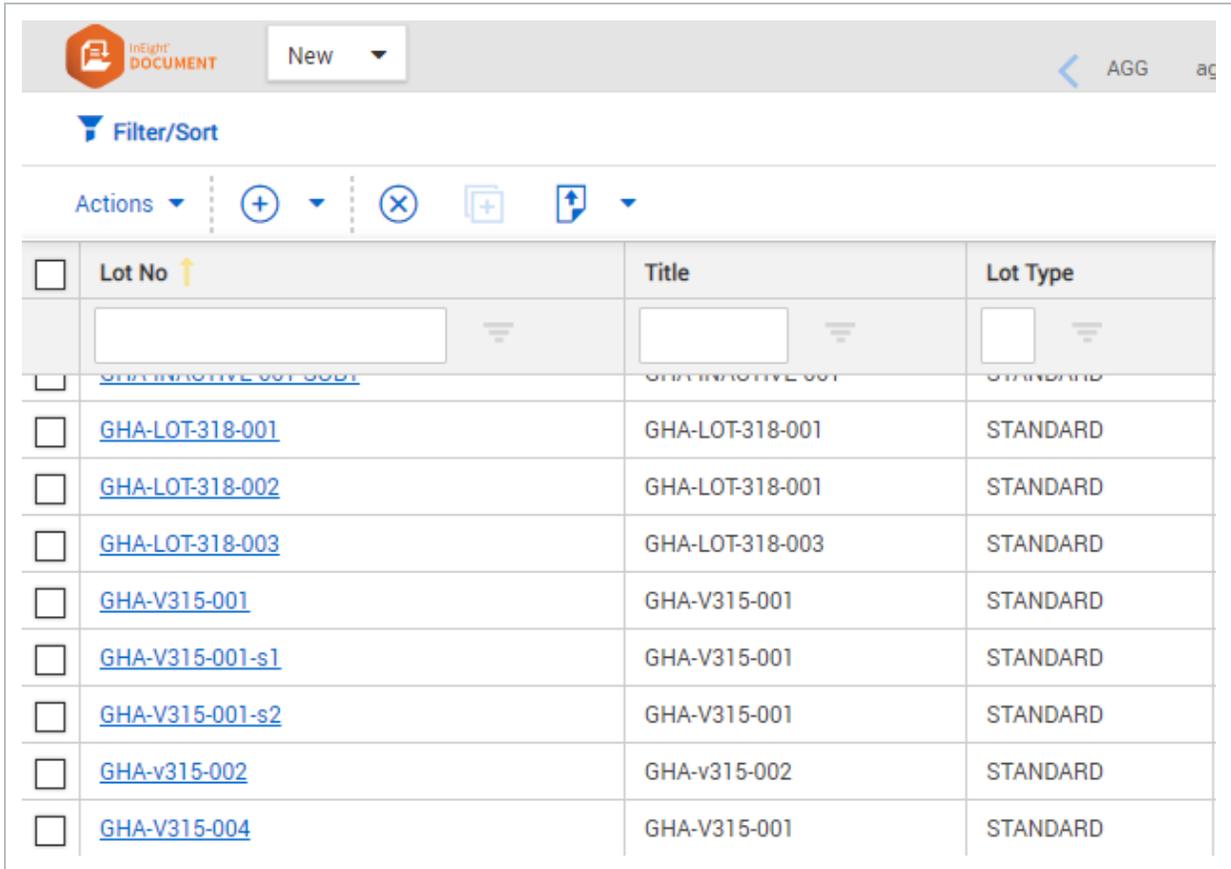
2.1 NAVIGATING WITHIN LOTS AND SUB LOTS

1. From the Dashboard Dropdown menu, click on the Lots module.



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

2. View the Lots and Sub Lots within the Register.



The screenshot shows the InEight Document interface. At the top, there is a header with the InEight Document logo, a 'New' dropdown menu, and navigation icons. Below the header is a 'Filter/Sort' section and an 'Actions' section with icons for adding (+), deleting (X), and other actions. The main content is a table with three columns: 'Lot No', 'Title', and 'Lot Type'. The table contains several rows of lot data, including 'GHA-L0T-318-001' through 'GHA-V315-004'. Each row has a checkbox in the 'Lot No' column.

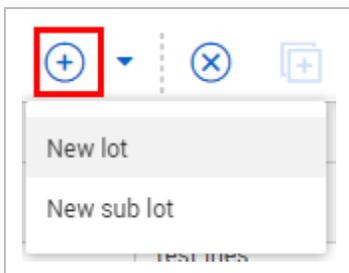
Lot No	Title	Lot Type
GHA-L0T-318-001	GHA-L0T-318-001	STANDARD
GHA-L0T-318-002	GHA-L0T-318-001	STANDARD
GHA-L0T-318-003	GHA-L0T-318-003	STANDARD
GHA-V315-001	GHA-V315-001	STANDARD
GHA-V315-001-s1	GHA-V315-001	STANDARD
GHA-V315-001-s2	GHA-V315-001	STANDARD
GHA-v315-002	GHA-v315-002	STANDARD
GHA-V315-004	GHA-V315-001	STANDARD

3. Click on a Lot Number to view the Lot Details and the Items allocated to the Lot.

2.2 LOT CREATION

To create your first Lot:

1. Select **Lots** from the dropdown menu.
2. Click on the **Plus** icon from the register and select **New lot**.



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

The screenshot shows the 'New lot' form in the 'DETAILS' tab. The form is organized into several sections:

- Top Bar:** 'New lot' title, 'DETAILS' tab, 'Actions' dropdown, 'New sub lot' button, 'Cancel' button, and a highlighted 'Save' button.
- Mandatory Fields (marked with asterisks):**
 - * Lot No: Text input field.
 - * Title: Text input field.
 - * Lot type: Dropdown menu with 'Select a Lot Type...'.
 - * Lot status: Dropdown menu with 'Select a Lot Status...'.
 - * Area: Dropdown menu with 'Select a Area...'.
- Other Fields:**
 - Created on: Date field (15-09-20).
 - Created by: Text input field.
 - Managed by company: Dropdown menu with 'Select a company...'.
 - Managed by: Dropdown menu with 'Select a contact...'.
 - Engineer company responsible: Dropdown menu with 'Select a company...'.
 - Engineer responsible: Dropdown menu with 'Select a contact...'.
 - Foreman company responsible: Dropdown menu with 'Select a company...'.
 - Foreman responsible: Dropdown menu with 'Select a contact...'.
 - * Process: Dropdown menu with 'Select a Process...'.
 - * Sub process: Dropdown menu with 'Select a Sub Process...'.
 - * Control line: Dropdown menu with 'Select a Control Line...'.
 - From chainage: Spinner field (0).
 - To chainage: Spinner field (0).
 - WBS: Text input field.
 - Lot opened on: Date field (dd-mm-yy).
 - Lot closed on: Date field (dd-mm-yy).
 - Work commenced on: Date field (dd-mm-yy).
 - Work completed on: Date field (dd-mm-yy).
 - Lot verified by company: Text input field.
 - Lot verified by: Text input field.

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NOTE

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

2.3 SUB LOTS

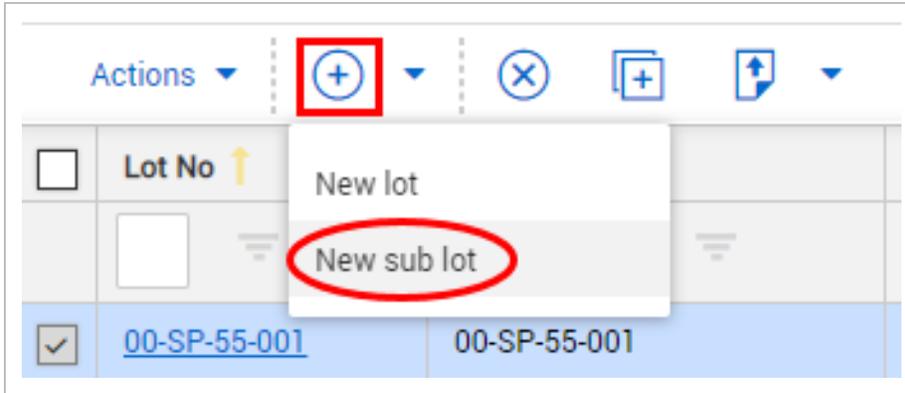
Sub Lots are typically used to break larger Lots further into smaller sub segments.

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.

2.3.1 To create a Sub Lot:

1. From the Lot list, select the Parent Lot then select using the **Plus** icon and select **Sub Lot**.



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

A screenshot of the 'New Sub lot' form. The form is titled 'New Sub lot' and has a 'DETAILS' tab. It contains several fields for entering lot information: Lot No, Title (CN-GHA-0001), Lot type (ALLROADS - ALL ROADS LOTS), Lot status (Outstanding), Area (Carpark (INACTIVE)), Created by (Greg Harrison, Houston Contracting), Engineer company responsible, Engineer responsible, Foreman company responsible, Foreman responsible, Process (Drainage), Sub process (Drainage pipe installation), Control line (NORTHBOUND EXIT RAMP (IN/)), From chainage (0), To chainage (0), WBS (ddddddd), Lot opened on (03-01-00), Lot closed on (03-01-00), Work commenced on (03-01-00), and Work completed on (03-01-00). There are 'Cancel' and 'Save' buttons at the top right. The footer includes '© 2020 InEight Inc. | v 20.07' and the 'INEIGHT' logo.

2.4 UPLOAD LOTS IN BULK

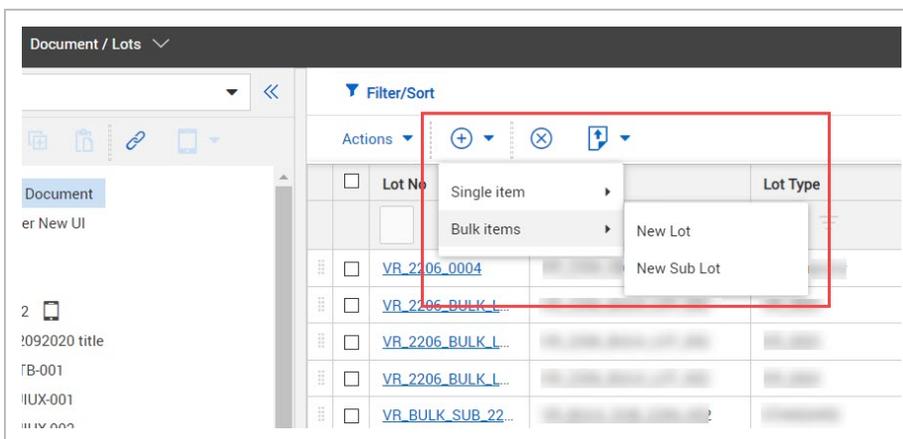
You can easily create multiple lots by using the bulk upload feature. You can add lots from a dialog box or from a Microsoft Excel spreadsheet.

2.4 Step by Step 1 — Upload lots in bulk from a dialog box

You can upload lots in bulk from a single dialog box. The dialog box lets you indicate the number of rows you want to add, and then you can add the lot information.

Use these steps to add lots or sublots. You cannot mix lots and sublots in a single upload.

1. From the lots register, click the **Add** icon, and then select Bulk items.



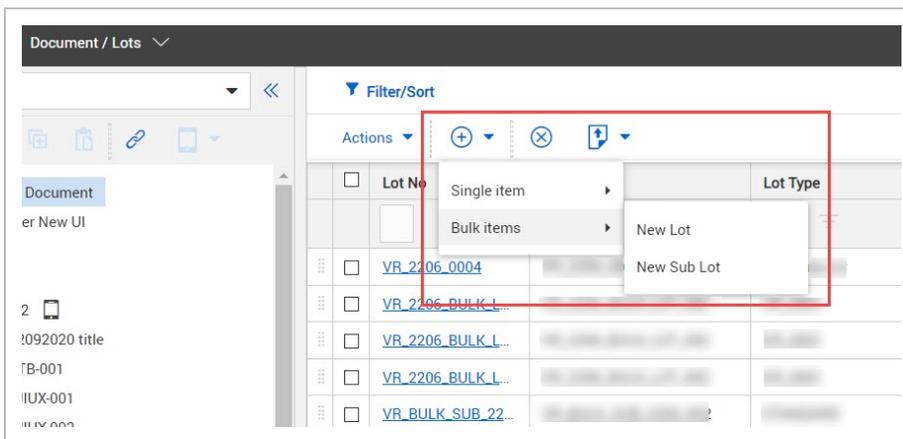
2. Select **New Lot** to add lots or **New Sub Lot** to add sublots. The Import Lots page opens.
3. Enter the number of rows you want to add in the new rows field, and then click the **Add** icon.
4. Add the lot information for each row. You must enter information in the required fields marked with asterisks.
5. Click **Validate**. If there are errors, fix them, and then click **Validate** again.
6. When there are no errors, click **Save**.

2.4 Step by Step 2 — Upload lots in bulk

Upload lots in bulk from a Microsoft Excel spreadsheet when you have a large number of lots you want to add to Document.

Use these steps to add lots or sublots. You cannot mix lots and sublots in a single upload. The grid on the Import Lots page must be blank. If there are existing rows, a warning stating that the details on the grid will be cleared shows when you import the Excel spreadsheet.

1. From the lots register, click the **Add** icon, and then select **Bulk items**.



2. Select **New Lot** to add lots or **New Sub Lot** to add sublots. The Import Lots page opens
3. Click the **Download template** icon. The Excel spreadsheet template is downloaded to your computer.
4. Open the template, and enter the lot information. The columns with headers in red are required.
5. Save the template.
6. From the Import Lots page, click **Import template**.



The Select Excel file dialog box opens.

7. Drag and drop the Excel file to the dialog box, and then click **Upload**. The spreadsheet entries are added to the Import Lots page. If there are errors, they are highlighted in red.
8. Fix any errors, and then click **Save**. The lots are added to the Lots register.

CHAPTER 2 – 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.

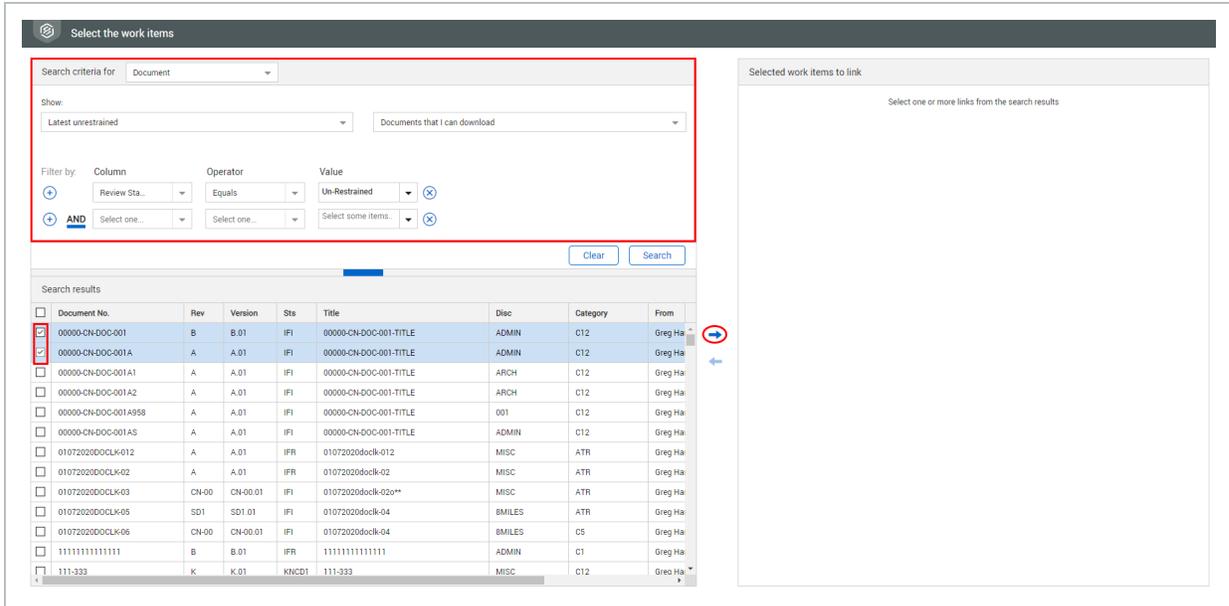
2.0.1 Adding Items to a Lot

1. Click on the required Lot / Sub Lot, then select the **Items** Tab.

The screenshot shows the 'Lot - CN-GHA-0001' interface. The 'ITEMS' tab is selected and highlighted with a red box. The top menu bar includes a plus icon circled in red, a minus icon, and the text 'Add Supporting files'. Below the menu bar is a table with the following data:

Supportin...	Transmittal No	Package	Subject	Message	Sent	From
<input type="checkbox"/>	HCC-000405	0000-00002	Notification of A...	sss	28-08-20	Greg ^
<input type="checkbox"/>	TRAINING01-DE...		Notification of R...	Thsnks and regards,Gre...	14-09-20	Greg

2. Click **Plus** icon from the top menu.
3. Apply search criteria to identify and assign related items.



4. Select required items, click on the right arrow to bring them to the Selected work items to link then click **Save**.

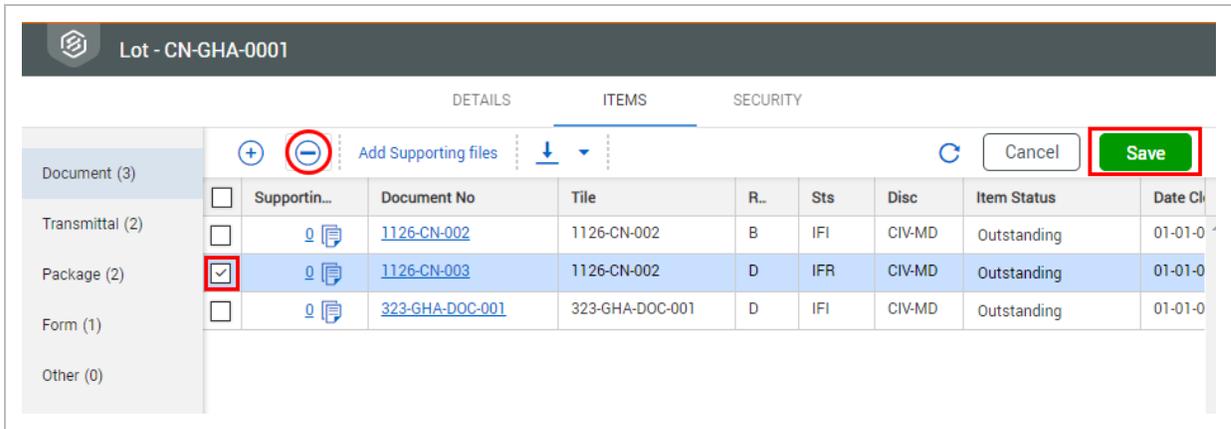
NOTE

- 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).

2.0.2 Removing Items from a Lot

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

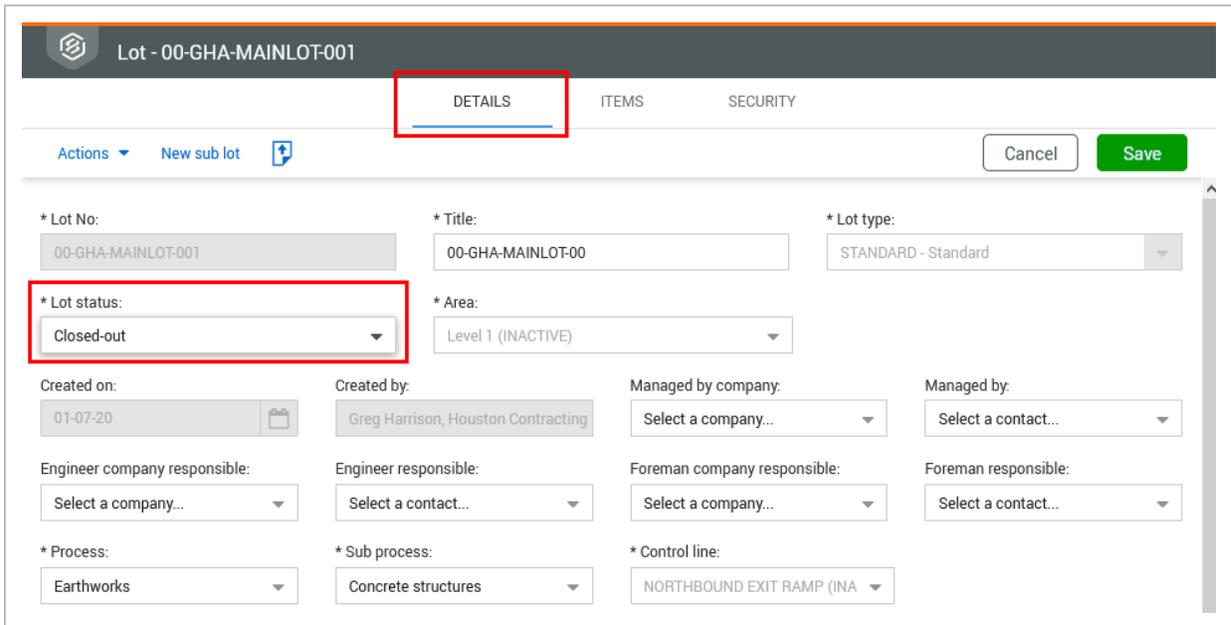
1. Select the items to be removed from the relevant section of the Lot (e.g. Documents).
2. Select the Minus icon, then click **Save**.



2.1 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.



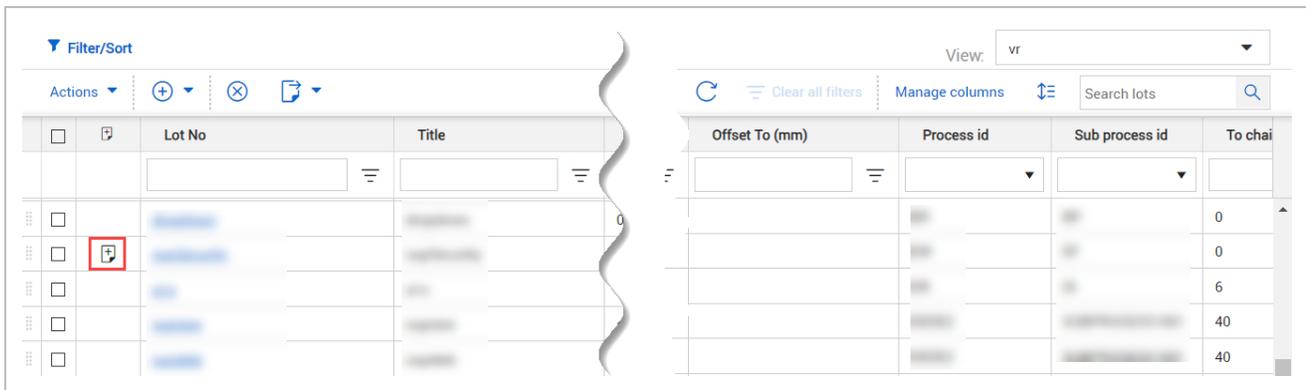
3. Click **Save**.

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.

2.2 MANAGE REVISIONS

When revisions have been made to a document in a lot, you can quickly link the revisions so that the lot refers to the most recent document. If a document in a lot has a new revision, an indicator shows in the column to the left of the Lot number on the Lots register.



Click the icon to see a list of revisions. You can then select one or more revisions to link to the lot., and then click **Save**.

Search criteria for Documents Show search

Search results Hide results

<input type="checkbox"/>	Document... ↑	R...	Ver...	S...	Title	Disc	<input type="checkbox"/> PDF	<input type="checkbox"/> DWC	<input type="checkbox"/> DOC	<input type="checkbox"/> OTH
<input type="checkbox"/>	00000000-TA-1...	C	C.01	IFC	Testing processing attac...	ADMIN				
<input type="checkbox"/>	00000000-TA-1...	B	B.02	IFI	Testing processing attac...	ADMIN	<input type="checkbox"/>			<input type="checkbox"/>

Items: 2 | Selected items: 0

Cancel Save

2.3 LOT REPORTS

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

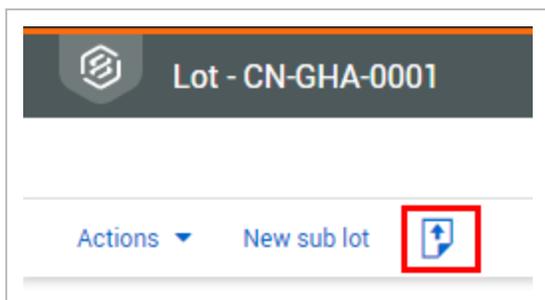
2.3.1 To run a report on a Lot:

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

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.

2.4 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.

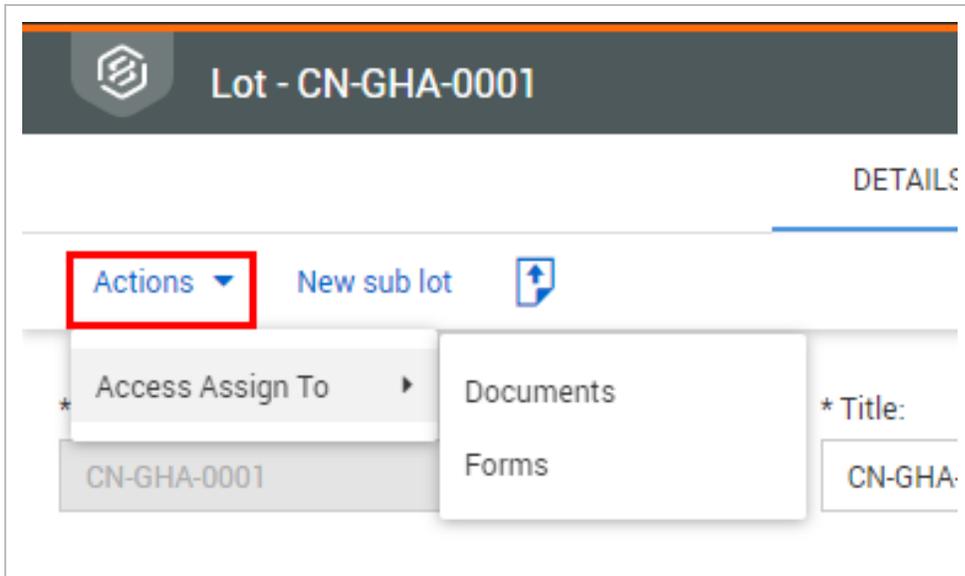


The Lot export will allow all data within a lot to be exported into a Zip file. This is typically used as part of handover documentation for example, to the client.

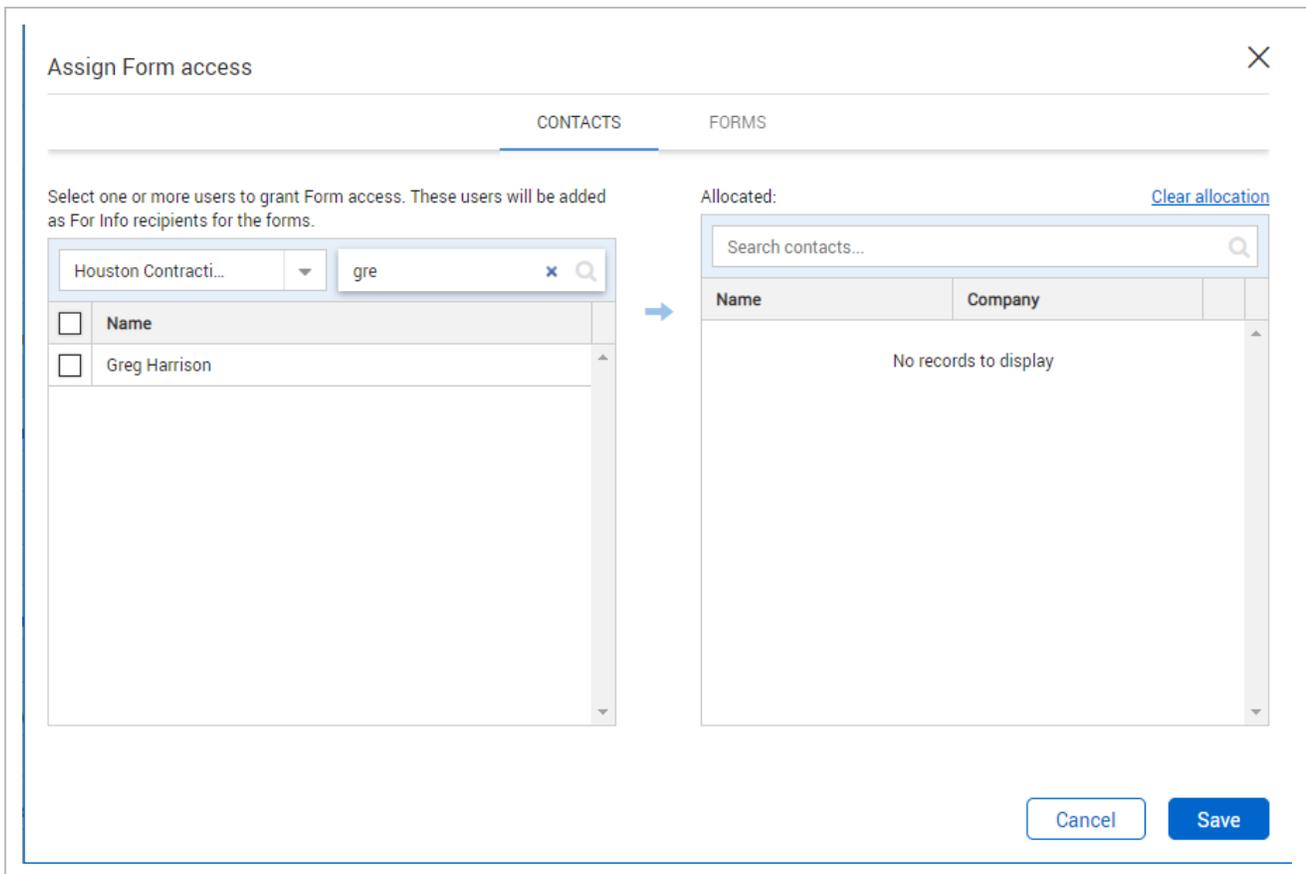
All information in the Lot will be exported into PDF (mails included) – including attachments. Items will be named by the reference number applied within the system and a lot summary will also be exported – Lot number, status, title.

2.5 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 Actions Menu

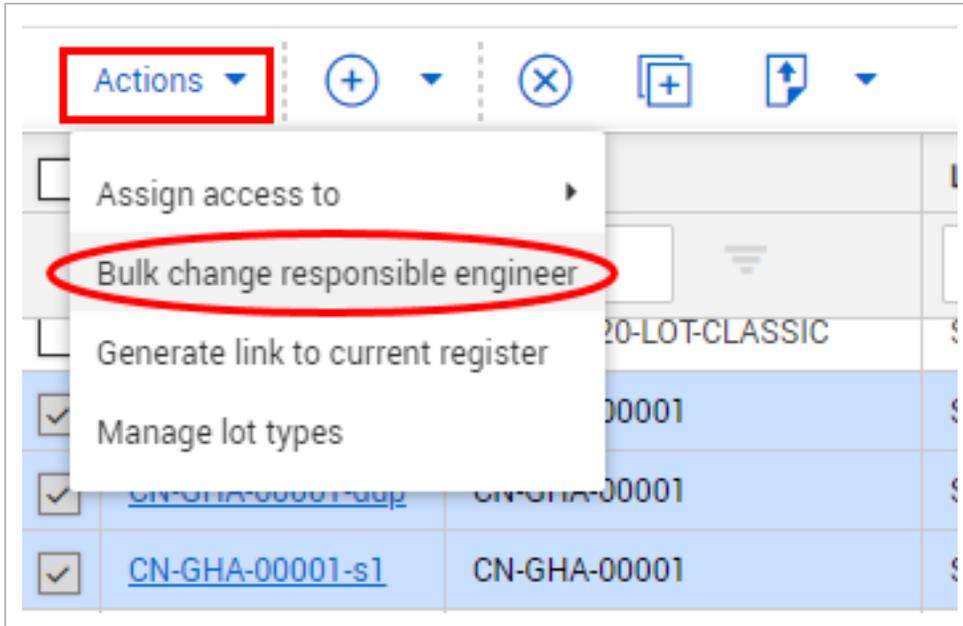


In the case of documents, access will be granted through the Assign Document Access function. In the case of Forms all users added will be added as For Info recipients. Select the users to be allocated and click the right arrow to bring them over to the Allocated window, then click Save.

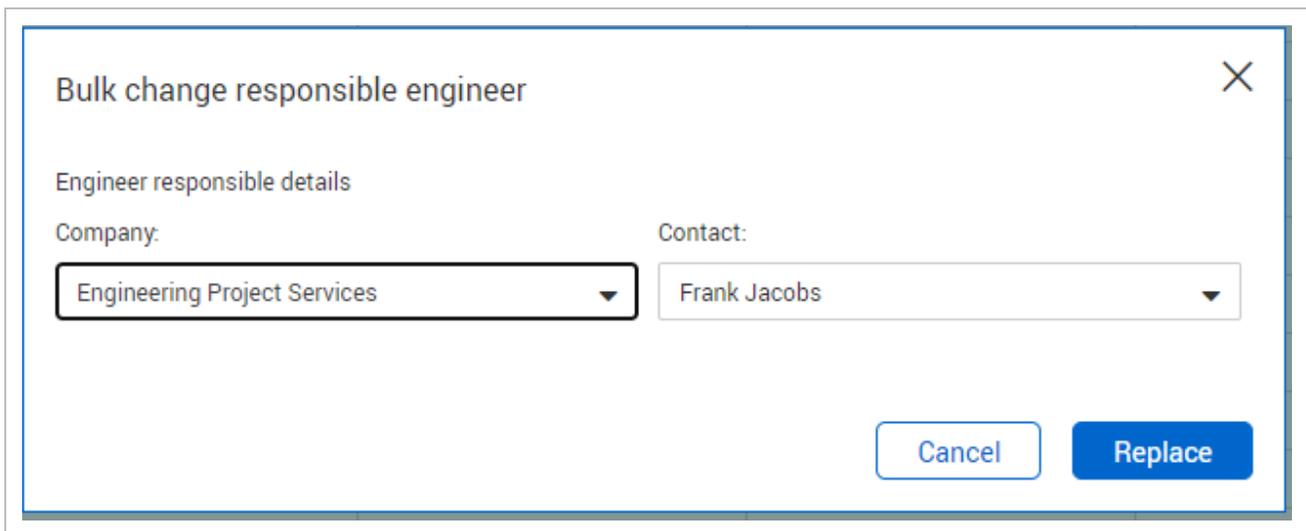


2.6 BULK CHANGE RESPONSIBLE ENGINEER

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

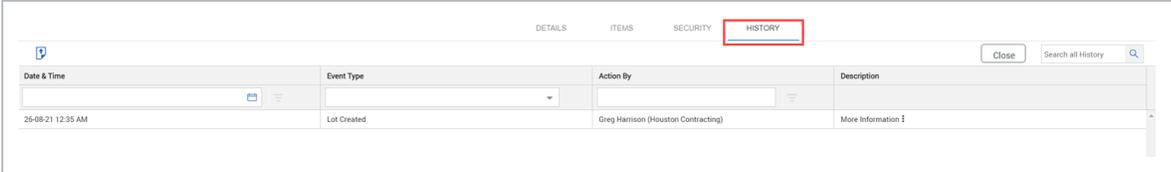


Select the company then the contact from the dropdowns and click **Replace**.



2.7 LOT HISTORY

The History tab shows a full audit trail of activities completed for the selected image. The history includes a list of all events, and the user that performed the action.



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CHAPTER 3 – LOT ADMINISTRATION

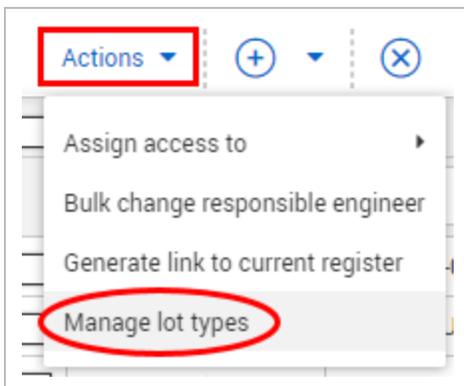
3.1 CREATING AND MANAGING LOT TYPES

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

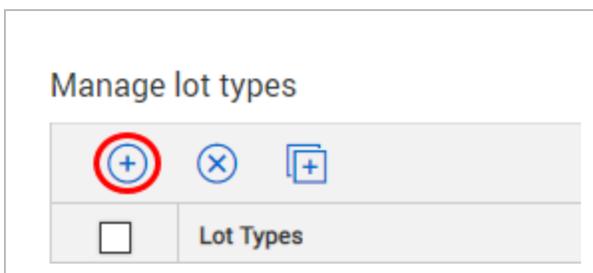
3.1.1 Create lot types

Follow these steps too create Lot Types and assign/manage the users who can access each Lot Type and module:

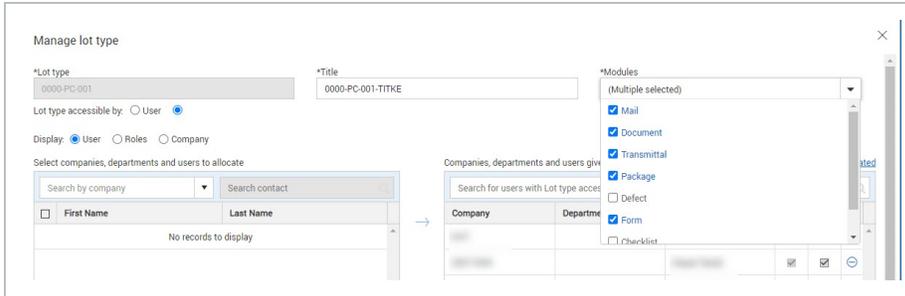
1. Click the **Actions** button from within the Lots Register then select **Manage Lot Types**.



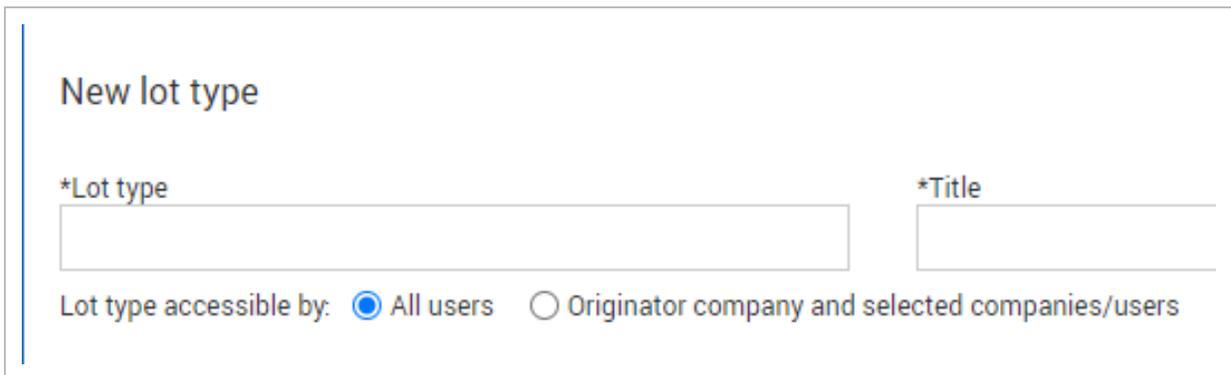
2. Choose **Plus** icon to create a new Lot type.



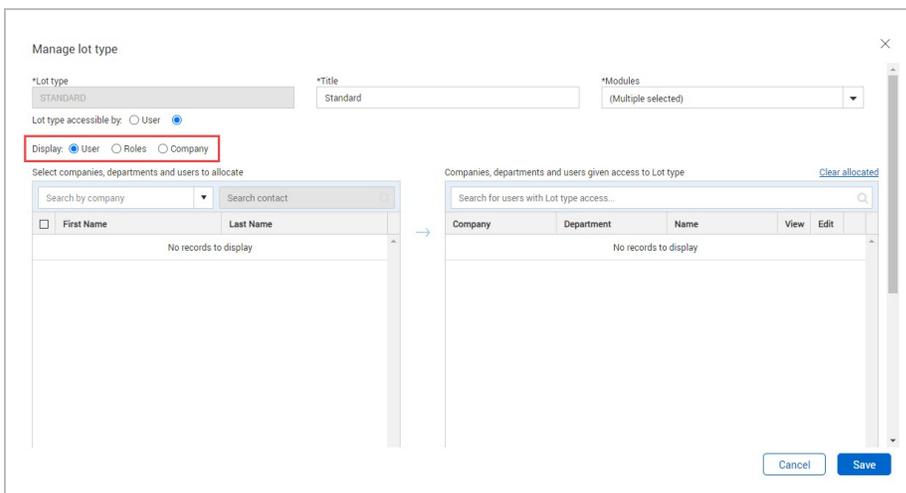
3. Next, within the Lot Types window, enter the **Lot Type**, **Title**, and select the **Modules** to be included for that specific Lot Type.



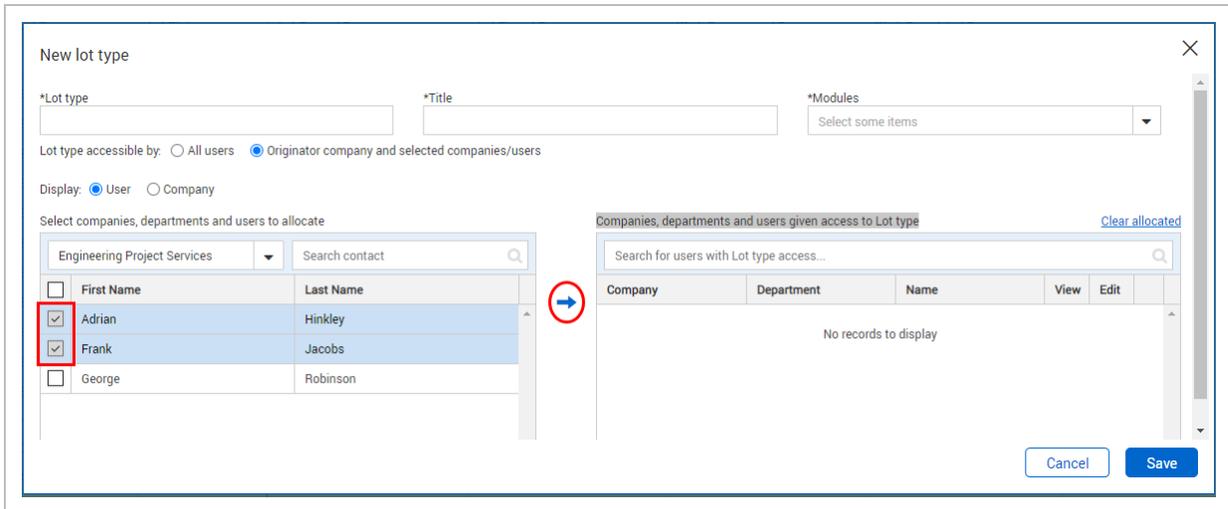
4. Select **All Users** to give all users on the project access to this Lot Type (subject to personal and security group settings in relation to lots in general).



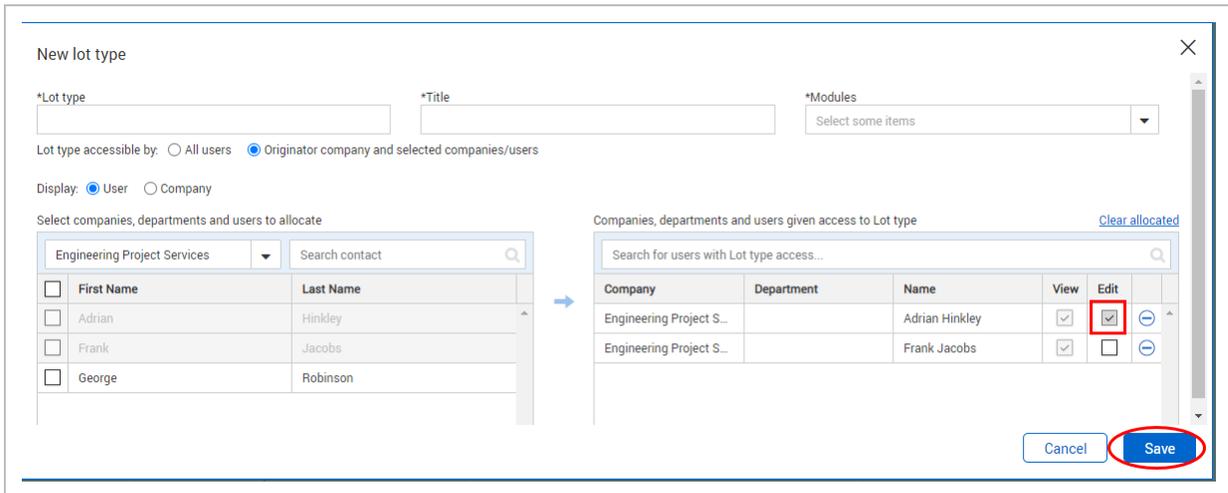
5. Alternatively chose the Originator company and selected companies/users radio button. Then click the User, Roles, or Company radio button to grant access to this Lot Type by user or company.



6. Select the Users or Companies to be given access then click the right arrow button to move them over to the Companies, departments and users given access to Lot type window.



7. 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. Document asks if you want to update lot security or modular access for already created lots.

- If you click **Yes**, the user is given access to all existing and new lots of that type.
- If you click **No**, the user is given access to only new lots created of that lot type.

NOTE

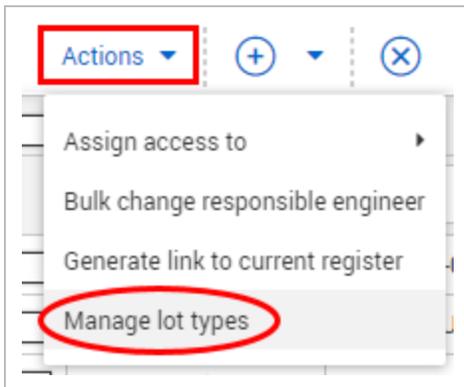
- Access to Lot Types can be defined as “view” or “edit” at an individual or Company level from the Manage Lot Types section of InEight Document.
- The Edit option will allow the users / companies to update Lot information such as information on the Lot page (based on their user security) and add / remove items that have been added to the Lot.
- There might be circumstances that access to an existing lot cannot be provided. A message shows with the lot numbers and the reason why access will not be granted.

3.1.2 Manage status distribution

You can configure lot types to automatically notify users when a lot is in a specific status.

Setting up status distribution lets users know when a lot is in a specific status. When a lot is in the specified status, Document automatically notifies the users or roles of the status, saving the users time from having to check the lot regularly or running a report.

1. Click the **Actions** button in the Lots Register then select **Manage Lot Types**.



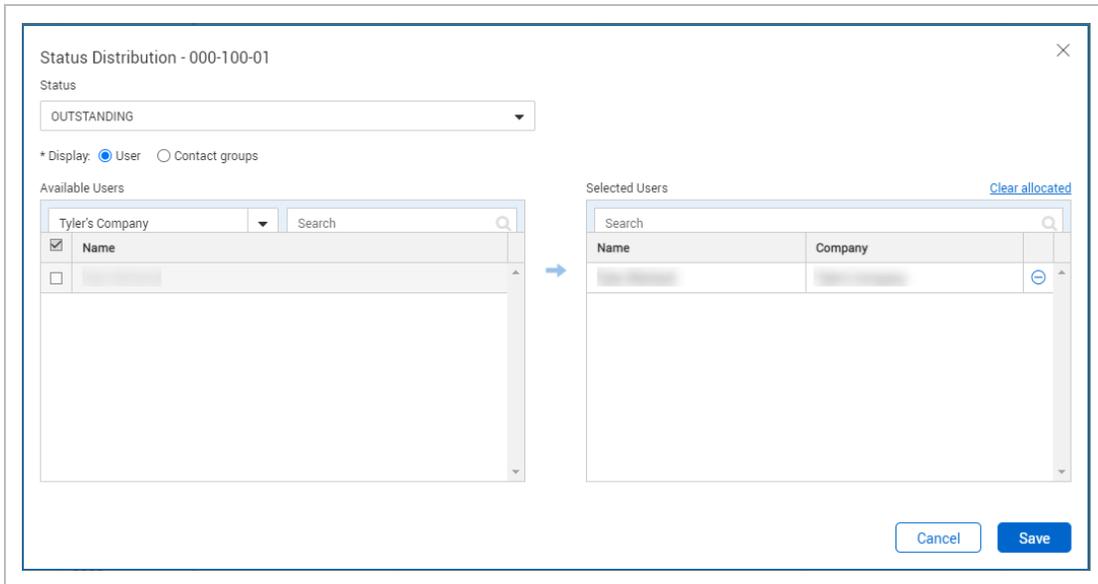
2. Click the **Edit** icon for a lot top to open the Status distribution dialog box.

Manage lot types

Lot Types	Title	Status Distribution
<input type="checkbox"/>	000-100-01 Area A Lots	
<input type="checkbox"/>	000-200-001 Area B Lot	
<input type="checkbox"/>	000-300-001 Area C Lots	

The Status Distribution dialog box opens

3. Select a status from the Status drop-down list.



- 4. Select User, Contract groups, or roles, and then select specific user names or groups.
- 5. Click **Save**.

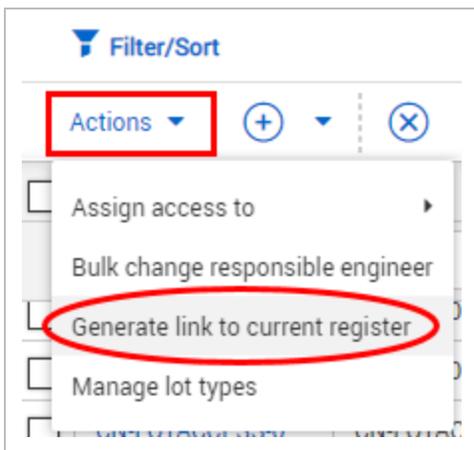
3.2 GENERATING LOT LINKS

To generate a lots shareable hyperlink:

- 1. Select the relevant lot and click **More** then select **Generate Lots Hyperlink**.

To generate a shareable hyperlink for the current Lots Summary Register:

- 1. Select **Actions** then **Generate Hyperlink for the current Register**.



3.3 LOT SECURITY SETTINGS

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

See the links below for more information:

3.3.1 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 User **Security** Tab.

The screenshot shows the 'Edit contact: Frank Jacobs' page with the 'USER SECURITY' tab selected. The page contains several dropdown menus for different modules, including Security Group, Standard mail, Document, Published report, Gallery, Sustainability, Manuals, Unregistered mail, Packages, Defects, Lots, Documents holding area, Folders, Transmittal, Tasks, Forms, and Vendor data. The 'Lots' dropdown menu is open, showing options: None, View, and Full. The 'Full' option is selected.

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

NOTE

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

3.3.2 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. When you duplicate a lot, you can only update fields and values that you have access to. The other fields are disabled. If you do not have access to the value, the field is blank.

1. From the InEight Document Dashboard, click the Settings > **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.

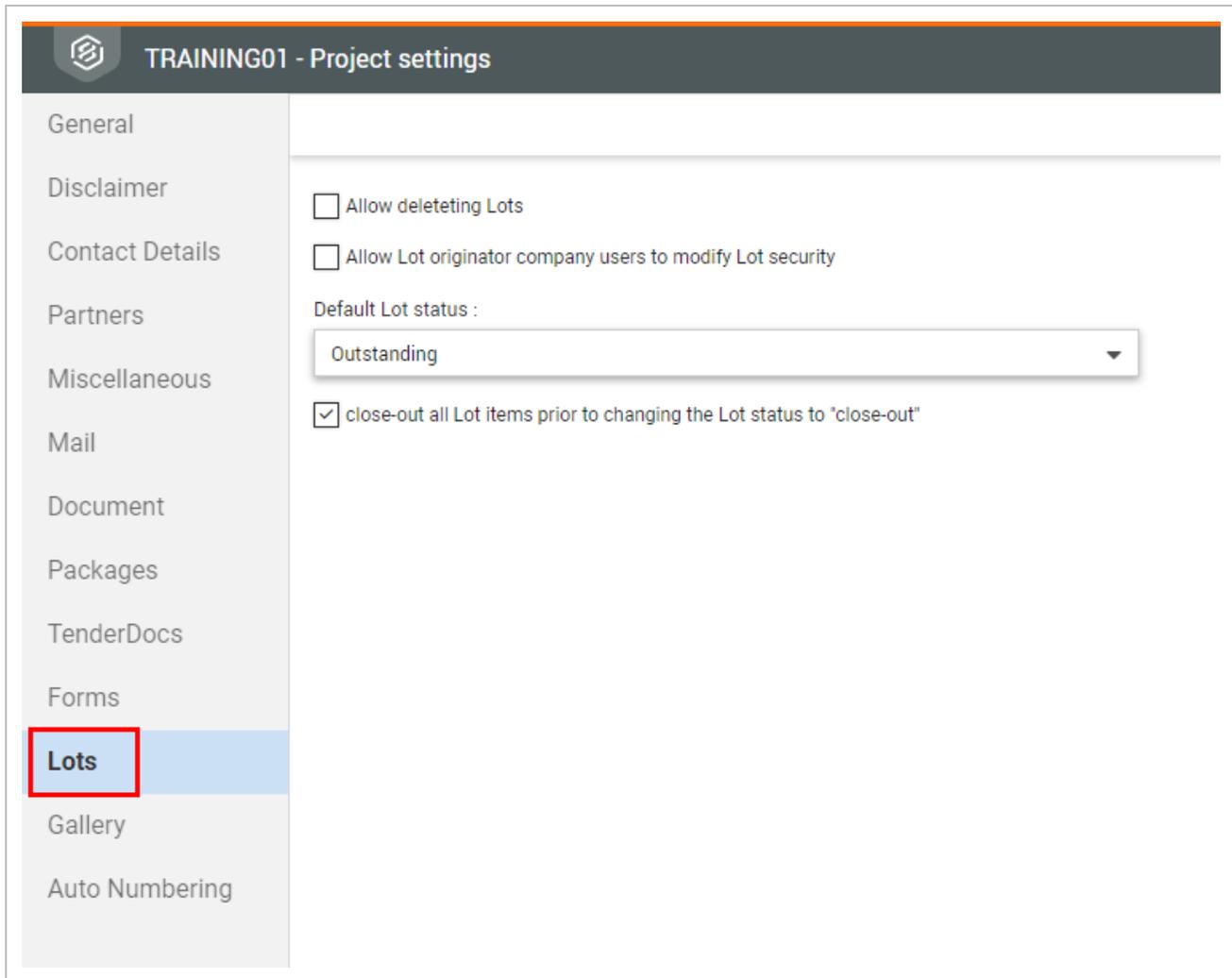
3. Create or delete Lots and Sub Lots.
4. Edit Lot attributes including:
 - Lot Title
 - Lot Type (available Lot types can be specified)
 - Lot Status (available Status values can be specified)
- Add, edit or remove items by module such as mail, documents or packages.

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, that is, they are disabled.
- Additional custom fields may be available depending on project.

3.3.3 Project Level Settings

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



TRAINING01 - Project settings

- General
- Disclaimer
- Contact Details
- Partners
- Miscellaneous
- Mail
- Document
- Packages
- TenderDocs
- Forms
- Lots**
- Gallery
- Auto Numbering

Allow deleteting 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

Lastly, there is also an option to grants 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.