

# DOCUMENT MANAGEMENT



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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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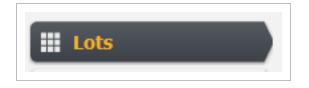
# CHAPTER 2 – LOT MANAGEMENT

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

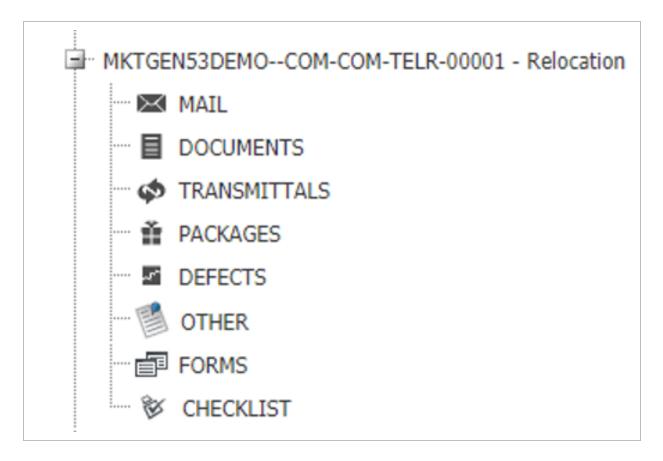
1. From the Left Hand menu, click on the Lots module.



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.

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

Lots	Lot Sumr	nary
TeamBinder Trial Project	New 👻	Delete
	Lot	Title
	Sub L	ot

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

🗑 🚽 🤊 - 😈 👉 🏈 Final: Show Markup 🔹 🏠 dev.teambinder.com/Tee	mBinder529x/Lots/tbLotDetailView.aspx?LinkItemKey=0&SourceLinkModule=L 💷 💷	
File Home Insert Page Layout Ref dev teambinder com	/TeamBinder529x/Lots/tbLotDetailView.aspx?LinkItemKey=0&SourceLinkModule=	
Kott Arial 14 New Lot		C AaBbCcl AaBbCc → A Find → absorb
Clipboard	New   Refresh Add Remove Print Export Close	Styles + kg Select +
L Details		§
Lot No*:		
Title*:		
Lot Type*:	Select a Lot Type	
Lot Status:	Outstanding	
Created On:	29-06-17	
Created By:	Greg Harrison, Houston Contracting	
Managed By:	Select a company 💌 Select a contact 💌	=
Engineer Responsible:	Select a company 💌 Select a contact 💌	
Foreman Responsible:	Select a company 🔻 Select a contact 💌	
Process:	Select a Process	
Sub Process:	Select a Sub Process 💌	
Area:	Select an Area 💌	
Control Line:	Select a Control Line	
From Chainage:	0.000 To Chainage: 0.000	
WBS:		
Lot Opened On:		
Work Commenced On:		
Work Completed On:		
Lot Closed On:		±
Lot Verified By:	Select a company V Select a contact V	kina ¥
Page: 7 of 16 Words: 1,929 🥸 Insert Comments		

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.

	New 👻	Delete	Refresh	Print	Expo
0	Lot Sub Lo	ot 🚽		T	
	MKTGEN5	3DEMO-60-BF	RG-BRG-BFAS-	00001	

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

eviteanibilider.com/reani	Binder529x/Lots/tbLotDetailView.aspx?LotKey=112&Action=NEWSUBLOT						
dev.teambinder.com/T	eamBinder529x/Lots/tbLotDetailView.aspx?LotKey=112&Action=NEWSUBLOT&tc+		Greg Harrison	Settings	✓ Help	✓ Loc	jout
ew Sub Lot		-	5	2			
New Sub Lot Save	New  Refresh Add Remove Print Export Close	- × =	Search	崎 Contacts	✓ L Rep	orts 🗘	Admin
Details		ummary Go Advar	nced Saved				
.ot No*:		•					
litle*:	Lot 002	Lot Status	Lot Opened On	Lot Closed On	Work Commenced On	Work Completed On	Engir
ot Type*:	Standard - STANDARD		▼ dd-mm-yy 🔳 🍸	dd-mm-yy		dd-mm-yy	1
ot Status:	Outstanding	OUTSTANDING	15-10-14		03-11-14		Justir 🔺
Created On:	29-06-17	OUTSTANDING	20-10-14		21-10-14		
Created By:	Greg Harrison, Houston Contracting	OUTSTANDING	30-10-14		30-10-14		Fred
Managed By:	Engineering Project Services	CLOSED-OUT	10-11-14	13-11-14	10-11-14	11-11-14	Dilha
Engineer Responsible:		OUTSTANDING	03-11-14				
-		OUTSTANDING	30-10-14		30-10-14	16-12-14	Fred
Foreman Responsible:	Select a company V Select a contact V	OUTSTANDING	20-10-14 14-10-14		21-10-14 02-11-14		2
rocess:	Earthworks 🔹	OUTSTANDING	14-10-14		02-11-14		Justir Justir
Sub Process:	Select a Sub Process	OUTSTANDING	15-10-14		03-11-14		Justin
Area:	Select an Area 💌	CLOSED-OUT	10 10 11		00 11 11		Jusen
Control Line:	NEW TOORBUL POINT ROAD	OUTSTANDING					
rom Chainage:	1.200.000 To Chainage: 1.210.000	CLOSED-OUT					
WBS:	2.30	OUTSTANDING	13-01-15		21-01-15	23-01-15	Fred
		OUTSTANDING	13-01-15		21-01-15	23-01-15	Fred
ot Opened On:	20-10-14	OUTCTANDING	12.01.15		21.01.15	22.01.15	
Nork Commenced On:	21-10-14					22 items in	1.00000

## 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)

Lot - MKTO	EN53DE	MO-60-	BRG-BI	RG-BFA	5-00001						
New Sub Lot	Save	New 🔻	Add	Remove	Refresh	Print	Close	More 🔻	Add Suppo	rting Docs	
Details	Mail Do Mail Ref	cuments	Transmi Subjec	)	Packages	Defects	\	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	cklist Othe		urity Item St

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

New Sub Lot	Save New 💌	Add Remove Refresh	Print Close More 🕶	Add Supporting Docs	
Details	Mail Documents	Transmittals Packages	Defects Forms Check	klist Other Securit	ty
🔲 Туре 🔺	Mail Ref	Subject	Respond by Date	e From Company	Item Status

# 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.

Details Mail	Documents Transmittals Packages Forms Other Security
Lot No*:	BH-101-01-01
Title*:	Excavation and Piling
Lot Type*:	STANDARD - Standard
Lot Status*:	Outstanding
Created On:	14-12-18
Created By:	Greg Harrison, Houston Contracting
Managed By:	Select a company 💌 Select a contact 💌
Engineer Responsible:	Engineering Project Services   Frank Jacobs
Foreman Responsible:	Select a company 💌 Select a contact 💌

#### 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.

Reports	Scheduled		
01. Address E	look		
02. Administr	ation		
04. Documen	t Register		
05. Transmitt	als		
07. Documen	t Workflow		
10. Mail			~
15. Packages			
20. Tasks			
30. Lots			^
001 - Lot Reg	ister (Summar	y Report)	

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

Delete Maximum records to display:	Modify Delete		,	on (Detailed Report)	Lot Description	eport Title:
					Now	un Report:
		Excel CSV Word	🔲 🕐 Export to: 🖌 PDF	03-2017 14:59	O On 17-0	
			<ul> <li>No end date</li> </ul>	One time only	Repeat:	
					To:	
					Cc:	
1_						
2	2	DRA-DRA-SUBS-0001	Lot No: Contains			
2	2	•	Title: Contains			
•	•	a company	Created By: Select a c			
	~		Process: All			
	•		Sub Process: All			
,	•		Area: All			
ס	• 0.00	▼ 0.00 To: Equal to	Chainage From: Equal to			
2	2	•	WBS: Contains			
	•		Lot Status: All			
11						

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

No	Sub Lot	Title	Opened By		Status	Lot Opened Or	1 Lot Closed On Comments
A-DRA-SUBS-0001	DRA-DRA-SUBS- 0001	Subsoil under Williams Landing overpass			CLOSED-OUT	15-04-15	16-04-15
Mail							
Туре	Document No	Subject	Rev	Sts	Item Staus	Due by Date	Date Closed
SD	SD-00024	Test 3 - Comments in 11 General Comments			OUTSTANDING		
Docume	nts						
Туре	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 Do	cuments	·		•		
	Title		File Name				
	A-DOC001-IFI		A-DOC001-I	FI.pdf			
Other							
Туре	Document No	Subject	Rev	Sts	Item Staus	Due by Date	Date Closed
	Bella Vista.jpg	Bella Vista			OUTSTANDING		

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.

New Sub Lot Sav	ve New TAdd Remove Refresh Print Close More T
Details Mail	Documents Transmittals Packages Defects
Details	Assign Access To
Lot No*:	MKTGEN53DEMO-60-BRG-BRG-BFAS-00001
Title*:	Relocation of Telecommunication - Section 13
Lot Type*:	STANDARD - Standard

# 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

Lot Summary	
New   Delete Refresh Print Export	More 💌
Lot No 🔺	Duplicate Export Lot Manage Lot Types
	Register View
L-001	Assign Access To
1-01	Bulk Change Responsible Engineer Forms
L-002	LUI UV2
✓ MCD-123	Wind Turbine 001
✓ MCD-123-01	Wind Turbine 001
MKTGENRDEMO-BR-BR01-EARTHWORKS-CLEAR AND GRUB-0001	Unner Creek - Farth Retainaing Wall

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

	Need Help? V	II be added as For Info recipients for the fo	rms.
Contacts	Forms		
Company:	Engineering Project Services	<b>•</b>	
	Search all Contacts	Go	
Name		Name	Company
Frank :	Jacobs	Fred Bassett	Haslam Construct
James	Pickford		

## 2.9 BULK CHANGE RESPONSIBLE ENGINEER

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

More	•	
ſ	Duplicate	
	Export Lot	
-	Manage Lot Types	-
	Register View	
	Assign Access To	- F
	Bulk Change Responsible Engineer	
	110 1072	

📄 Bulk Change Re	sponsible Engineer
Engineer Responsible:	Archon Consultants Pty Ltd
	Damien Eltham
	Replace Close

This page intentionally left blank.

# 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.

Mor	e 🔻	
ſ	Duplicate	
	Export Lot	
	Manage Lot Types	
	Register View	►
	Assign Access To	•
	Bulk Change Responsible Engineer	

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

📄 Manage Lot Ty	pes	
Manage Lo	t Types	
New Du	plicate Delete	Refresh Print Close
<ul> <li>Lot Type ▲</li> <li>LTLOTS</li> <li>RDLOTS</li> <li>STANDARD</li> <li>TWLOTS</li> </ul>		TitleLaboratory Test LotsRoadworks Contractor LotsStandardTemporary Works Lots

3. 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.

📄 New Lot Type		×
Save Clos Details Seco	ee urity	
Lot Type *:		
Title *:		
Modules":	<ul> <li> Select All</li> <li>Mail</li> <li>Documents</li> <li>Transmittals</li> <li>Packages</li> <li>Defects</li> <li>Forms</li> <li>Others</li> </ul>	
	▼	

4. 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).

<b>QA Software</b> TeamBinder	Support Hotline:	oLotRegister.aspx?&Module=Lots&Filter=1&BrowserZoom= 1800 727 102		ngs 💙 Help 💙 Logout
MKTGEN16DEMO - TB5.DE	MONSTRATI	Edit Lot Type	X	icts 🗸 🎚 Reports 🏟 Admi
∎ New ✓	Lots	Details Security		Advanced Saved
Dashboard	TISS.DEP	Accessible by		Lot Opened On Lot Closed On Wo
🖾 Mail		Selected Companies and Users     Company     Name	Add Companies Add Users Remove	▼ dd-mm-yy
Documents		No records to display.		29-12-14 05-
Transmittals Packages				
Defects	_			
Tasks				
Lots				

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.

<b>QA Software</b> TeamBinder				Joel	Fredericks Settin	ngs Y Help Y Logout
MKTGEN16DEMO - TB5.DE	MONSTRATI	Edit	Lot Type		8	acts 🗸 🎚 Reports 🗘 Admin
• New 🗸	Lots		Select Companies		8	Advanced Saved
Dashboard		Acce	Companies	Selected		Lot Opened On Lot Closed On Com
🖾 Mail		0	Haslam Construction Pacific Complete	Houston Contracting	ve	dd-mm-yy         dd-mm-yy         dd-dd-mm-yy         dd-dd-dd-dd-dd-dd-dd-dd-dd-dd-dd-dd-dd
Documents		No		→		29-12-14 05-0
🏟 Transmittals				To Right		
Packages     Defects				*		
🖹 Tasks						
Lots						
				ОК	Cancel	
				► ► Page size: 100 -		

- TB5.DEMONSTRATION PROJECT SJA Google Chrome - • × demo.teambinder.com/TeamBinder528x/Lots/tbLotRegister.aspx?&Module=Lots&Filter=1&BrowserZet m=0&tcKey=3572af25-0eec-416c-a9ea-9ed5b7d22879 **QA Software** 📰 Edit Lot Type × MKTGEN16DEMO - TB5.DEMONSTRATIO ✓ Ill Reports ♣ Admin Select Contacts X Lots Deta Company: Houston Contracting Acce Go Advanced Search all Contacts View Selected Dashboard Company Last Name First Name 🔺 Houston Contracting Greg Harrison Houston Contracting HC USER1 Joe Houston Contracting Fredericks Houston Contracting Kong Chan 5 Defe H + H Page size: 100 -0 items in 0 pages Items Selected: 1 OK Cancel
- 7. Click the Add Users button to select the users to have access.

8. 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.

QA Software		/tbLotRegister.aspx?&Module=Lots&Fil e: 1800 727 102	lter=1&BrowserZoom=0&tcKey=		Settings Y Help Y	Logout
		🖃 Edit Lot Type				
MKTGEN16DEMO - TB5.DE	MONSTRATI	Save Close			cts 🗸 🔟 Reports	🕸 Admin
🖬 New 🗸 🗸	Lots	Details Security				
		Accessible by				
Dashboard		<ul> <li>All Users</li> </ul>			Lot Opened On Lot	
		<ul> <li>Selected Companies and Users</li> </ul>		Add Companies Add Users Re	emove dd-mm-yy 🗰 dd-	
🖾 Mail		Company	Name	View Edit	29-12-14	
		Houston Contracting	Greg Harrison		29-12-14	
		Haslam Construction	All Users			
🍄 Transmittals		Houston Contracting	Joe Fredericks	<b>a</b>		
🖞 Packages						
Si Defects						
🖹 Tasks						
Lots						
	4		▲ 1 ▶ ▶I Page size: 100	<b>v</b>		

Ν

9. Click **Save** once complete.

OTE	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.

urity Group:	Client	~
ndard Mail:	Company 🗸	
egistered Mail:	Company V	
ers:	Create, View & Allocate 🗸	
ument:	Full V	
kage:	Full V	
nsmittal:	Company V	
ished Report:	Full V	
ects:	None V	
s:	None	
:	View Full	
ns:		
	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.

New Duplicate Delete Re	resh Print	
Security Group 🔺	Title	
000	Open User	
BDM	Business Development Manager	
CLIENT	Client	
CONS	Consultant	
CONSTR	Construction	
HCON	Head Contractor	
Save Add Remove Refr Mail Type Access Transmittal Typ		Lots
Description	Allow Available Values	
► Create Lots		
► Delete Lots	<b>v</b>	
► Edit Attributes		
► Add Items	<b>2</b>	
P Moo Items		

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.

Description	Allow
▼ Create Lots	✓
Lots	✓
Sub Lots	

Description	Allow
► Create Lots	✓
▼ Delete Lots	✓
Lots	✓
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)

demo.teambinder.com/Tea <b>QA Softwai</b> TeamBinder	re		AaBbCcl AaBbCc T Heading 6 11 Heading 7 ♥ Change Styles ♥ Change Styles ♥ Editing
MKTGEN16DEMO - TB	5.DEMC		
■ New ~		Manage User Access	
		New Duplicate Delete Refresh Print	
Dashboard		Security Group      Title     HCON-RES     Head Contractor - Restricted	
🖾 Mail		PCO Pac Complete Group	
Mag Midli		PMCA     PMCA     SUB     SUB	
Documents		TEST Test User (Client)	
🗢 Transmittals		Save Add Remove Head Contractor Lots	
Packages		Mail Type Access Transmittal Type Access Form Type Access Users Security	
	<	▼Edit Attributes 🖉	
Defects		Lot Title 🖉	
💼 Tasks		Lot Type  All  V	
Lots		Process  All V Lot Area	
		From Chainage 🖉	
Forms		To Chainage 🖉	
		WBS 🕑	
		Lot Status 🖉 All 🔹 🗸	

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

	▼ Edit Items		
	Mail		
	Documents	✓	
	Transmittals	✓	
	Packages	✓	
	Other	✓	
	Forms	✓	
	Remove Items	✓	
	Mail	✓	
D	Documents	✓	
Page	26 of 27 Transmittals	✓	InEight Inc.   Release 19.7
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- 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.

Allow Lot originate	or company users to modify Lot securit	ty	
efault Lot Status	Outstanding	•	
Close-out all Lot if	tems prior to changing the Lot Status to	o "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

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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.