

QUICK GUIDE

LOTS ESSENTIALS

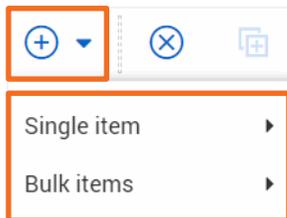


ACCESSING LOTS

1. Click **Document / Dashboard** ▾ ► **Lots**.

CREATING A LOT

1. Click on the **Plus** icon ► select **Single Item** or **Bulk Items**.



2. Select **New Lot** or **New Sub Lot**.
3. Enter mandatory fields and/or additional fields.

* Lot No: * Title: * Lot type:

* Lot status: Area:

4. Click **Save**.

ADDING WORK ITEMS TO A LOT

1. Click on a document number to open Lot / Sub Lot.
2. Select the **Items** tab.
3. Click **+** icon.
4. Enter In the Search Criteria ► **Search**.

5. Select the checkboxes to add document/s.

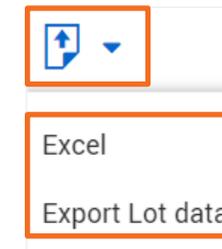
Search results					
<input type="checkbox"/>	Document No.	Rev	Version	Sts	Title
<input checked="" type="checkbox"/>	00000-CN-D0C-001	B	B.01	IFI	00000-CN-D0C-001
<input checked="" type="checkbox"/>	00000-CN-D0C-001A	A	A.01	IFI	00000-CN-D0C-001A
<input type="checkbox"/>	00000-CN-D0C-001A1	A	A.01	IFI	00000-CN-D0C-001A1
<input type="checkbox"/>	00000-CN-D0C-001A2	A	A.01	IFI	00000-CN-D0C-001A2
<input type="checkbox"/>	00000-CN-D0C-001A958	A	A.01	IFI	00000-CN-D0C-001A958

6. **→** select the arrow.
7. Click **Save** ► **Close**.

Note: Tick **Supporting Doc Req** if supporting evidence is required against the item added within the Lot. Once ticked, item status can only be closed-out when a supporting file is added within the Lot item.

EXPORTING LOTS DATA

1. Click on the Lot / Sub Lot (s).
2. Select the **Export** icon ► select **Excel** or **Export Lot data**.



Excel: All information in the Lot will be exported into an Excel spreadsheet.

Export Lot data: All information in the Lot will be exported into PDF (mails included) – including attachments.

CHANGING THE LOT STATUS

1. Click on the Lot / Sub Lot.
2. Select the **Details** tab.
3. Under **Lot status:** ► select a status from the drop down.
4. Click **Save**.

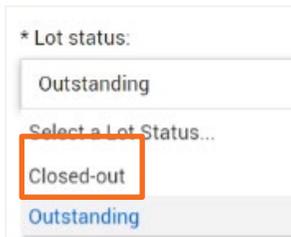
Note: You will only see the statuses that have been assigned in security group settings (If you have Admin access it can be found here: **Settings > Admin > Manage user access > Select the security group > Access type: Security | Module: Lots > Edit Attributes > Lot Status**).

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🟡 CLOSING A LOT

1. Click on a document number to open Lot / Sub Lot.
2. Change the Lot status to **Closed-out**.



* Lot status:

Outstanding

Select a Lot Status...

Closed-out

Outstanding

Note: If there are supporting files added with an outstanding status, they need to be closed out / checked via the checkbox.

Date Closed	Due by Date	Supporting Docs Req
dd-MM-yy 	dd-MM-yy 	<input type="checkbox"/>
dd-MM-yy 	dd-MM-yy 	<input type="checkbox"/>

🟡 LOT REPORTING

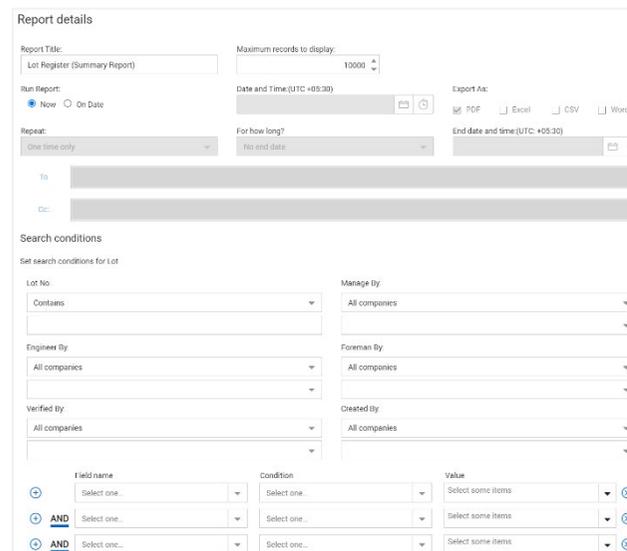
1. Click **Document / Dashboard** ▾ ▶ **Reports** ▶ **Lots tab**.

001 - Lot Register (Summary Report)

010 - Lot Description (Detailed Report)

015 - Lot Status Change Report

2. **Choose a report** ▶ Enter Report details & Search conditions.



Report details

Report Title: Lot Register (Summary Report) Maximum records to display: 10000

Run Report: Now On Date Date and Time (UTC +05:30) Export As: PDF Excel CSV Word

Repeat: One time only For how long? No end date End date and time (UTC +05:30)

To: [Redacted]

CC: [Redacted]

Search conditions

Set search conditions for Lot

Lot No: Contains [Select one] Manage by: All companies

Engineer by: All companies Foreman by: All companies

Verified by: All companies Created by: All companies

Field name	Condition	Value
Select one	Select one	Select some items
AND Select one	Select one	Select some items
AND Select one	Select one	Select some items

3. Click **Search**.

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