QUICK GUIDE



ACCESSING LOTS

1. Click Document / Dashboard \checkmark **>** Lots.

CREATING A LOT

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

+ •	\otimes	Ē
Single it	tem	•
Bulk ite	ms	Þ

2. Select New Lot or New Sub Lot.

3. Enter mandatory fields and/or additional fields.

* Lot No:	* Title:	* Lot type:
AUTO		Select a Lot Type 👻
* Lot status:	Area:	
Outstanding 👻	Select a 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.

Search criteria for	Mail - Inbox	-			
Show:			Received:		
Personal		-	🖲 All mail	⊖ New mail	○ Outstanding mail
To:			From:		
		-	All companies		~
		-			-

5. Select the checkboxes to add document/s.

Se	arch results				
	Document No.	Rev	Version	Sts	Title
	00000-CN-DOC-001	в	B.01	IFI	00000-CN-DC
⊻	00000-CN-DOC-001A	А	A.01	IFI	00000-CN-DC
	00000-CN-DOC-001A1	А	A.01	IFI	00000-CN-DC
	00000-CN-DOC-001A2	А	A.01	IFI	00000-CN-DC
	00000-CN-DOC-001A958	А	A.01	IFI	00000-CN-DC

6. \rightarrow 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.

Supporting Docs Req

EXPORTING LOTS DATA

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



Export Lot data

Excel

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).

QUICK GUIDE



CLOSING A LOT

1. Click on a document number to open Lot / Sub Lot.

2. Change the Lot status to **Closed-out**.

* Lot status:	
Outstandin	g
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	Ħ	dd-MM-yy	Ħ	
dd-MM-yy	Ħ	dd-MM-yy	Ħ	

NEED SOME MORE HELP?

-		7.
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LOT REPORTING

- 1. Click Document / Dashboard V > 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.

leport details							
Report Title:	Maxi	imum records to displ	av:				
Lot Register (Summary Report)			10000 🌲				
Run Report:	Date	and Time:(UTC +05:3	0)		Export As:		
Now O On Date				8 G	PDF 🔄 Excel	CSV	Word
Repeat:	For h	how long?			End date and time:(UTC: -	05:30)	
One time only	- No	o end date		~			1 C
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Lot No Contains Engineer By All companies		Ŧ	Manage By All compani Foreman By All compani	es es			• •
tet search conditions for Lot Lot No. Contains Engineer By All companies		• •	Manage By All company Foreman By All company	es 			* * *
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3. Click Search.