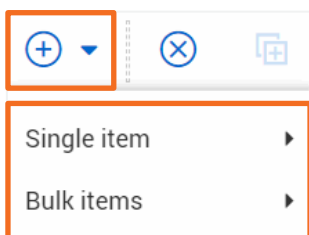


ACCESSING LOTS

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**

Search criteria for

Show: Received: All mail New mail Outstanding mail

To: From:

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-DOC-001	B	B.01	IFI	00000-CN-DC
<input checked="" type="checkbox"/>	00000-CN-DOC-001A	A	A.01	IFI	00000-CN-DC
<input type="checkbox"/>	00000-CN-DOC-001A1	A	A.01	IFI	00000-CN-DC
<input type="checkbox"/>	00000-CN-DOC-001A2	A	A.01	IFI	00000-CN-DC
<input type="checkbox"/>	00000-CN-DOC-001A958	A	A.01	IFI	00000-CN-DC

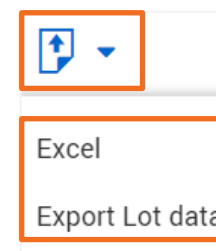
4. **→** select the arrow
5. Click **Save** ► **Close**

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)
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**)

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 <input type="checkbox"/>	dd-MM-yy <input type="checkbox"/>	<input type="checkbox"/>
dd-MM-yy <input type="checkbox"/>	dd-MM-yy <input type="checkbox"/>	<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:

Cc:

Search conditions

Set search conditions for Lot

Lot No: Contains: Manage By: All companies

Engineer By: All companies Foreman By: All companies

Verified By: All companies Created By: All companies

Field name	Condition	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="radio"/> AND	<input type="text"/>	<input type="text"/>
<input checked="" type="radio"/> AND	<input type="text"/>	<input type="text"/>

3. Click **Search**

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