Surveys & Certificates

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Surveys & Certificates

# Purpose of the software

* To have a ship-specific list of Survey Certificates, and records of their date done and next due.
* Provide vessel with means to view records and the uploaded attachments for each instance of a survey or certificate

# Controls and your action required

1. Both Office & Ship can update records in this module.
2. Vessel is however able to extract the status list in MS Excel format.

# Using the module

1. Start the Jot ERP Module from the Desktop.
2. After login, the STARTUP screen is displayed.
3. In this screen, click on ‘TECHNICAL’ module from Left hand side list.
4. Then click on SURVEYS & CERTIFICATES.

Graphical user interface, website

Description automatically generated

1. The main screen of the Surveys & Certificates module will open, as shown below.

Graphical user interface, application

Description automatically generated

1. This will display list of Surveys & Certificates for your vessel, with their current set of Dates of Issue and Expiry. If a record has an attachment, it will also be displayed on the extreme-right of this screen.
2. It will also have a “Add New” button, to add new records of the said list of Survey & Certificates.
3. You can use the filters in the top section of this screen to filter the information available. The filters you can use are:
   1. Category
   2. Survey/Certificate name
   3. Issue Date – From and To
   4. Expiry Date – From and To
   5. Due in number of days – 30, 60, 90 days

# Add New Record:

Based on your office's preferences, the ship may be permitted to upload the Surveys/Certificates in the Jot ERP, or your office may choose to upload themselves from shore side.

This ADD option is only available onboard basis these criteria.

**Note: The records can be saved without Certificate No. and if there is no ‘Date of Expiry’ then tick mark against the box of ‘No Expiry Date’.**

1. To add new record to the Survey/ Certificates, click on “Add New” button on the extreme right-hand side.
2. It will open a new window – “Survey Details- Add new record”.
3. Feed in the required details, such as Certificate No., Date of Issue, Date of Expiry & Remarks.
4. Click on “Save & Close” button.

A screenshot of a computer

Description automatically generated

1. The new record will be added, as below.

Graphical user interface, application

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# Add the Attachments & Endorsements:

1. Select the Survey/ Certificate name.
2. A new window will open. Click on ‘New Endorsement’.
3. Another window will open to feed in the details, such as – Planned date, Issue date, Remarks & Attachment.
4. Then click on ‘Save & Close’ button.
5. Graphical user interface, application

   Description automatically generatedAnd the Endorsement will be added.
6. To add the Attachment, click on browse button.
7. Select the image & click on Open.
8. Graphical user interface

   Description automatically generatedThe attachment will be added.

# To View the Survey/ Certificate records:

1. Graphical user interface, application

   Description automatically generatedOn clicking on a record in the lower section of the screen, the individual screen will open, displaying the full-style details of the Survey/Certificate record saved in the Jot ERP, as shown below:
2. In this screen, you will also get access to the multiple attachments uploaded by the office for that survey/certificate record. On clicking on any of the attachment names, you can view that attachment.
3. Apart from the various details, there is another option of having a REMINDER DATE for this survey/certificate type. This date and its Remarks are updated only from the shore offices.