

CRM Certification System User Manual

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1. Introduction

Welcome to the ERP Certification System. This system is designed to streamline auditing, certification, and compliance management.

Purpose of this Manual:

- Guide users on using each module efficiently.
- Ensure compliance with standard procedures.

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- Provide troubleshooting guidance.

2. System Overview

The ERP Certification System allows users to manage auditors, client records, templates, audits, and Digital certifications. Each module is designed for specific tasks to ensure smooth workflow.

3. Modules

3.1 Auditor (users)

Purpose: Manage auditor profiles.

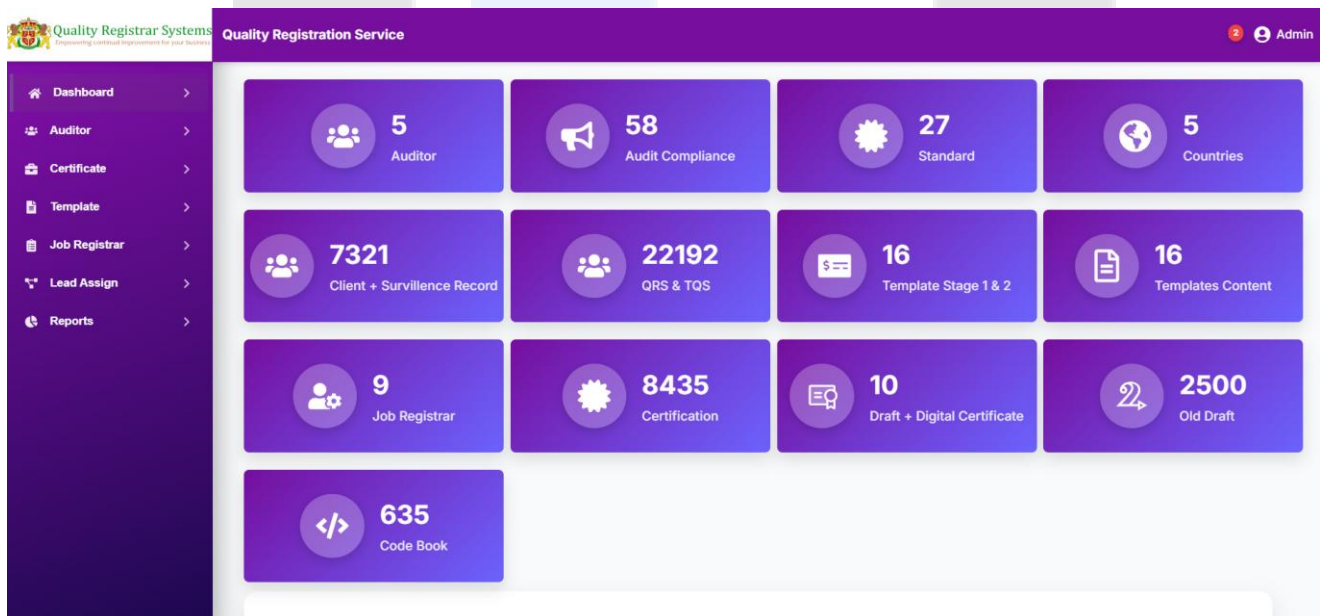
Key Features:

- Add/edit auditor details

Step-by-Step Instructions:

1. Navigate to **Auditor** module.
2. Click **Add New Auditor** → Enter details → Save.

Screenshot Placeholder:



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3.2 Audit Compliance (58 Records)

Purpose:

The Audit Compliance module is designed to **track, monitor, and report audit compliance** for clients. It allows audit teams to manage audit schedules, status, and results while linking each audit to relevant standards and templates.

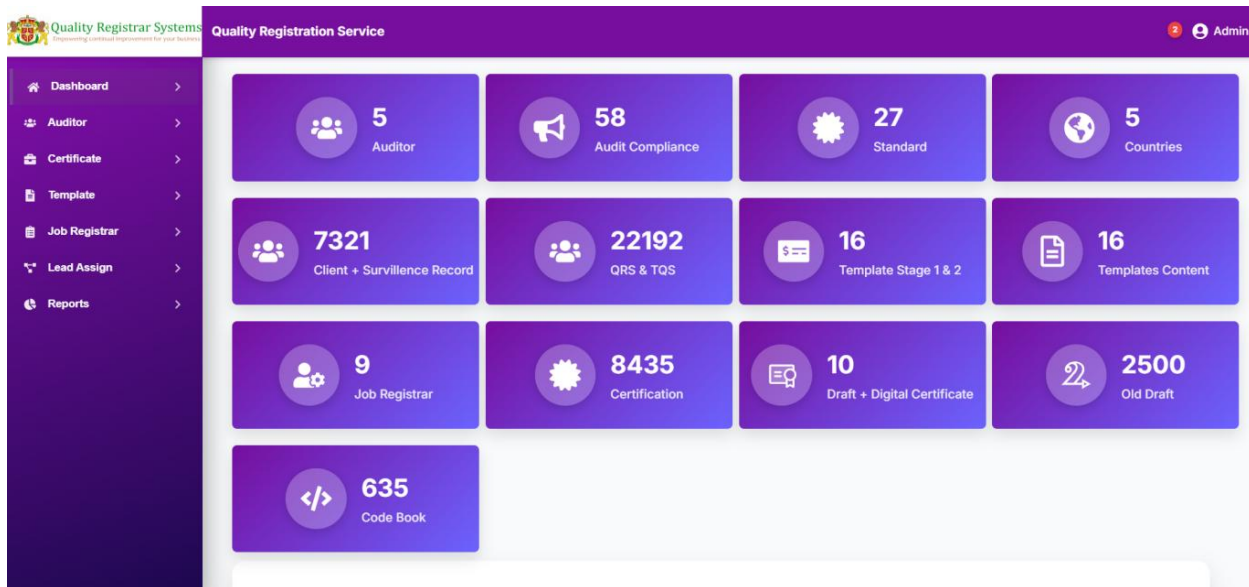
Key Features:

- **Monitor Client Compliance:** Track whether clients meet compliance requirements, including physical or virtual audits.
- **Generate Reports:** Create detailed audit reports and dashboards for management review.
- **Link with Standards/Templates:** Connect audits with specific standards or templates for structured evaluation.

Step-by-Step Instructions

1. **Open Audit Compliance Module:**
 - a. Navigate from the dashboard → Click **Audit Compliance**.
2. **Search for Client or Audit:**
 - a. Use filters such as **Company Name, Department, Audit Status, or Audit Year**.
 - b. Example: Filter by **Company = CALEY ELECTRICAL TRADING**.
3. **Update Compliance Status:**
 - a. Select the audit record → Change **Audit Status** (Scheduled, In Progress, Completed, Non-Compliant) → Save changes.

Screenshot Placeholder:



3.3 Standard (27 Records)

Purpose:

The **Standard module** is used to **manage and maintain certification standards** within the ERP Certification System. It allows auditors, and administrators to create, update, and reference standards in audits, ensuring all audit activities comply with the correct regulations.

Key Features:

- **Add/Edit Standards:** Maintain a centralized repository of all relevant certification standards.
- **Reference Standards in Audits:** Link standards to specific audits to ensure compliance and traceability.
- **Search and Filter Standards:** Quickly find standards by name, type, or date.
- **Analytics:** Track the usage and distribution of standards across audits and clients.

Step-by-Step Instructions

1. Open Standard Module:

- a. Navigate from the dashboard → Click **Standard**.

2. Search for a Standard:

- a. Use the **Search bar** to filter by standard name (e.g., ISO 9001, ISO 14001).

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b. Apply date filters if needed (From dd/mm/yyyy → To dd/mm/yyyy).

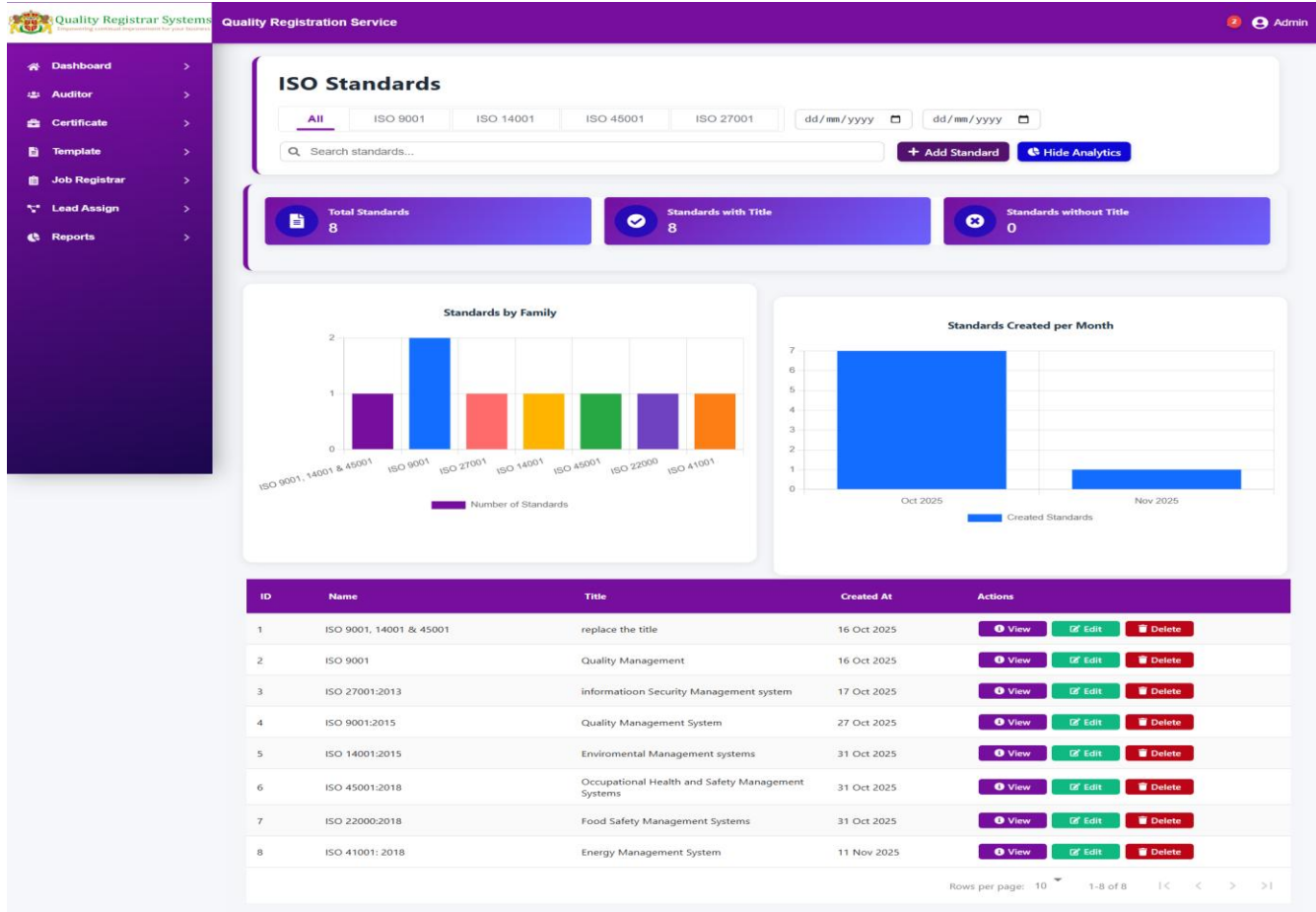
3. Add a New Standard:

a. Click **Add Standard** → Fill in the details (Name, title) → Save.

4. Edit Existing Standards:

a. Select a standard from the list → Click **Edit** → Update fields → Save.

Screenshot Placeholder:



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3.4 Countries (5 Entries)

Purpose:

The Countries module is used to **store and manage country-specific regulations** or **client locations**. This ensures that audits, compliance checks, and certifications are correctly aligned with local rules and standards.

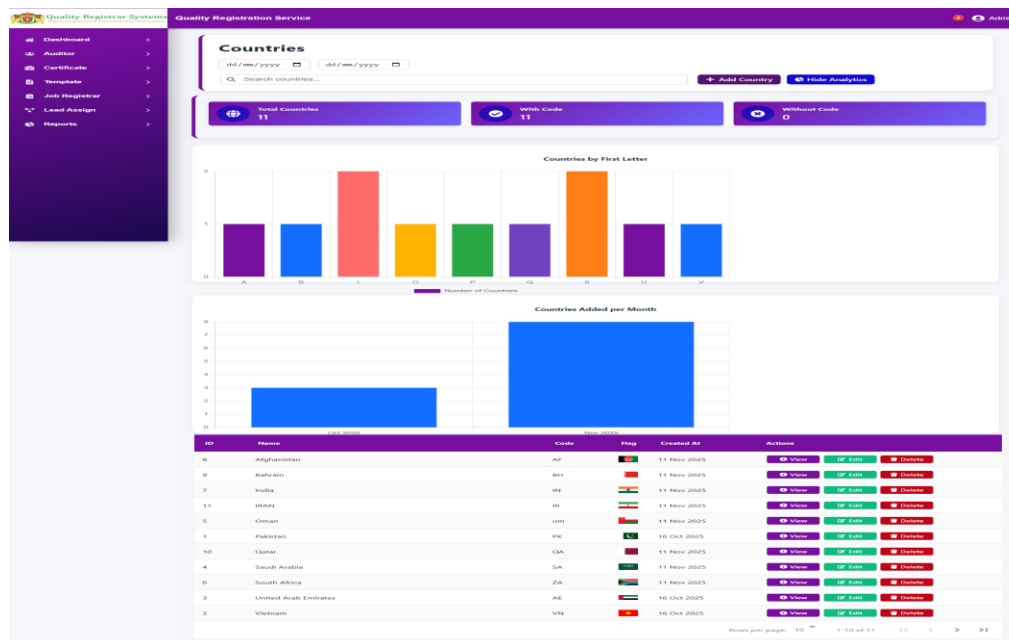
Key Features:

- **Maintain Country Information:** Add, edit, or remove country entries.
- **Track Local Regulations:** Link countries with relevant compliance standards.
- **Integrate with Client Records:** Assign clients to their respective countries for location-specific reporting.

Step-by-Step Instructions

1. **Open Countries Module:**
 - a. Navigate from the dashboard → Click **Countries**.
2. **Add New Country:**
 - a. Click **Add New** → Enter details:
 - i. **Name:** Full country name
 - ii. **Code:** Country short code. eg, UA
 - iii. **Flag Icon:** Upload or select flag icon
 - iv. **Created At:** Auto-generated
3. **Edit or Delete Country:**
 - a. Select the country → Click **Edit** to update fields → Save
 - b. Click **Delete** to remove country entry

Screenshot Placeholder:



3.5 Client + Surveillance Record (7,321 Records)

Purpose:

The Client + Surveillance Record module is designed to **manage client information, track surveillance audits, and maintain a complete audit history**. It allows administrators and auditors to view, update, and manage client records while linking audits and certifications to each client.

Key Features:

- **Manage Client Information:** Add, edit, and maintain detailed client data including contact information, standards, and certification details.
- **Track Surveillance History:** View the audit history for each client across all stages and types.
- **Perform Actions:** Generate reports, schedule audits, create jobs, issue certificates, and view audit documents.

Step-by-Step Instructions

1. Add a New Client:

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- a. Click **Add Client** → Fill in client details → Click **Save**.
- b. Required details include: Company Name, Company Code, Contact Person, Designation, Email, Mobile, Telephone, Fax, City, Address, Standard, Scope of Work, Certification Body, Accreditation, and Validity.

2. View Client:

- a. Search for the client using filters: **All/QRS/TQS, All Types, All Months, All Status, Date Range**.
- b. Click **View** → Opens a modal with multiple tabs showing:
 - i. Audit Details
 - ii. Audit Documents
 - iii. Surveillance History

3. Update or Edit Client:

- a. Select a client → Click **Edit** → Modify required fields → Save changes.

4. Delete Client:

- a. Select a client → Click **Delete** → Confirm deletion.

Perform Client Actions:

Action Button	Description
Summary Report	Generate an overview report of the client's audit history and compliance status.
Schedule Audit	Open the Schedule Audit modal → Choose Audit Stage and Audit Type → Set date → Save.
Create Job	Generate a job after an audit → Includes documents required for each audit stage.
Generate Certificate	Open form to generate Draft + Digital Certificate for the client.
View	Opens modal showing all audit-related details and documents.
Edit	Edit client record.
Delete	Remove client from the system.

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Screenshot Placeholder:



Quality Registrar Systems
Empowering Contract Registration for your business

Quality Registration Service

Admin

Dashboard

Auditor

Certificate

Template

Job Registrar

Lead Assign

Reports

Client Record

AllQRSQTS

All TypesAll MonthsAll Status

dd/mm/yyyydd/mm/yyyy

Search...

+ Add Client+ Analytics

Company Code	Company Name	Email	City	Contact Person	Actions
> NTE-2025-10-001111	ABC LLC	manzoorqrs@gmail.com	ABU DHABI	Altayaboon Technology	Summary ReportSchedule AuditCreate JobGenerate Certificate
> CET-2025-10-000111	CALEY ELECTRICAL TRADING	unknown@example.com	Dubai	benz john	Summary ReportSchedule Audit+
> EEA-2025-10-000001	ENIAZ ELECTRICAL AND SANITARY AND SAFETY AND SECURITY	unknown@example.com	Dubai	Unknown	Summary ReportSchedule Audit+
> ZEM-2025-10-111111	ZEECO ELECTRO MECHANICAL CONTRACTING	unknown@example.com	Dubai	Unknown	Summary ReportSchedule Audit+
> DBM-2025-10-000111	DAYAL BUILDING MATERIAL	unknown@example.com	Dubai	Unknown	Summary ReportSchedule Audit+
> ECF-2025-10-000001	AL EZZA COMPANY FOR GENERAL CONTRACTING	unknown@example.com	Dubai	Unknown	Summary ReportSchedule Audit+
> ALT-2025-10-111111	AL TANMIA CHEMICAL	unknown@example.com	Dubai	Unknown	Summary ReportSchedule Audit+
> PEC-2025-10-011111	PIONEER ENGINEERING CONSULTANCY	unknown@example.com	Dubai	Unknown	Summary ReportSchedule Audit+
> ...	SUN TOWERS GENERAL	...	Dubai	...	Summary ReportSchedule Audit+

Schedule Audit Form

Audit Management

X

Company Info

Schedule Audit

Audit Stages

Company Information

Code:

NTE-2025-10-001111

Name:

ABC LLC

Address:

I Najda Street - Al Danah - Zone 1 - Abu Dhabi

City:

ABU DHABI

Country:

Contact:

Altayaboon Technology

Email:

manzoorqrs@gmail.com

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Audit stages Form

Audit Management

Company Info

Schedule Audit

Audit Stages

Add Audit Stage

Select Audit

Select...

Audit Date

dd/mm/yyyy

Technical Expert

Stage Name

Stage 1

Audit By

Select...

ANZIC Code

Remarks

Save Stage

Generate Certificate form

Create Certificate

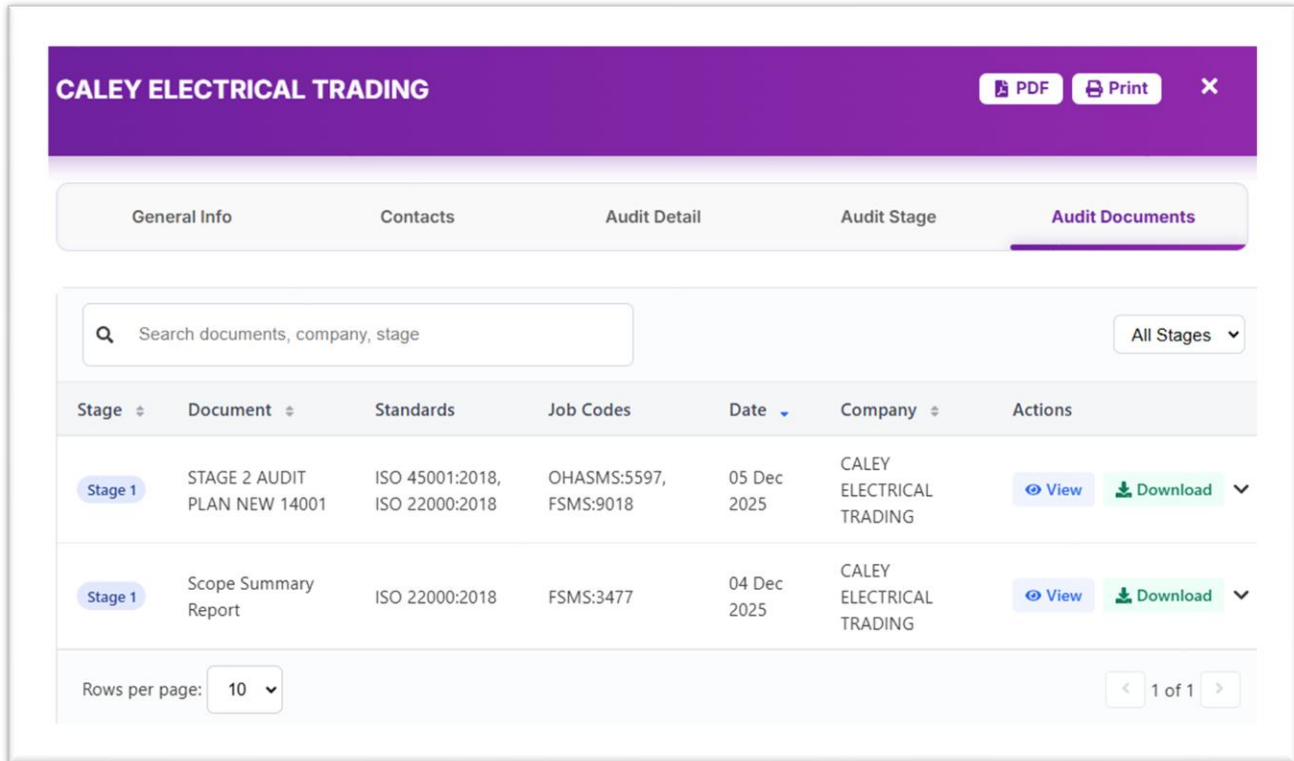
✕

Company ID	Standard
24529	ISO 22000:2018
Template	Country
QRS Certificate	United Arab Emirates
City	Scope of Work
Dubai	test
EA Codes	Originally Registered
28,34	07/12/2025
Issue Date	Expire Date
07/12/2025	dd/mm/yyyy
Verification Domain	Status
International	ACTIVE

Save

Cancel

→ Click on the View button then select tab to view. Audit Document, Audit Details etc



3.6 QRS & TQS (22,192 records)

Purpose:

This module manages **Quality Review Sheets (QRS)** and **Technical Quality Sheets (TQS)**. It is essential for maintaining detailed quality documentation of audits, tracking audit results, and enabling analysis for continuous improvement.

Key Features:

- Search/filter records by client, audit type, date, or auditor
- Link QRS/TQS to specific audits for traceability
- Generate analytics dashboards to visualize audit quality trends

Step-by-Step Instructions:

1. **Open QRS & TQS Module**
 - a. Navigate: **Modules** → **QRS & TQS**
2. **Search or Filter Records**
 - a. Use filters for:
 - i. Company: QRS / TQS / All

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- ii. Client Name
- iii. Auditor
- iv. Status: Completed / Pending
- v. Date Range

3. Add/Edit Client

- a. Click **Add New Client** → Enter details → Save
- b. To edit, select a sheet → Update fields → Save

4. View Analytics Dashboard

- a. Use the **Compliance Dashboard** to visualize data:
 - i. Cards: Total Clients, Total Surveillance, Active/Inactive Clients, Clients This Month
 - ii. Pie Chart: QRS vs TQS distribution
 - iii. Audit trends by month or type

Analytics Example (Based on Your Data):

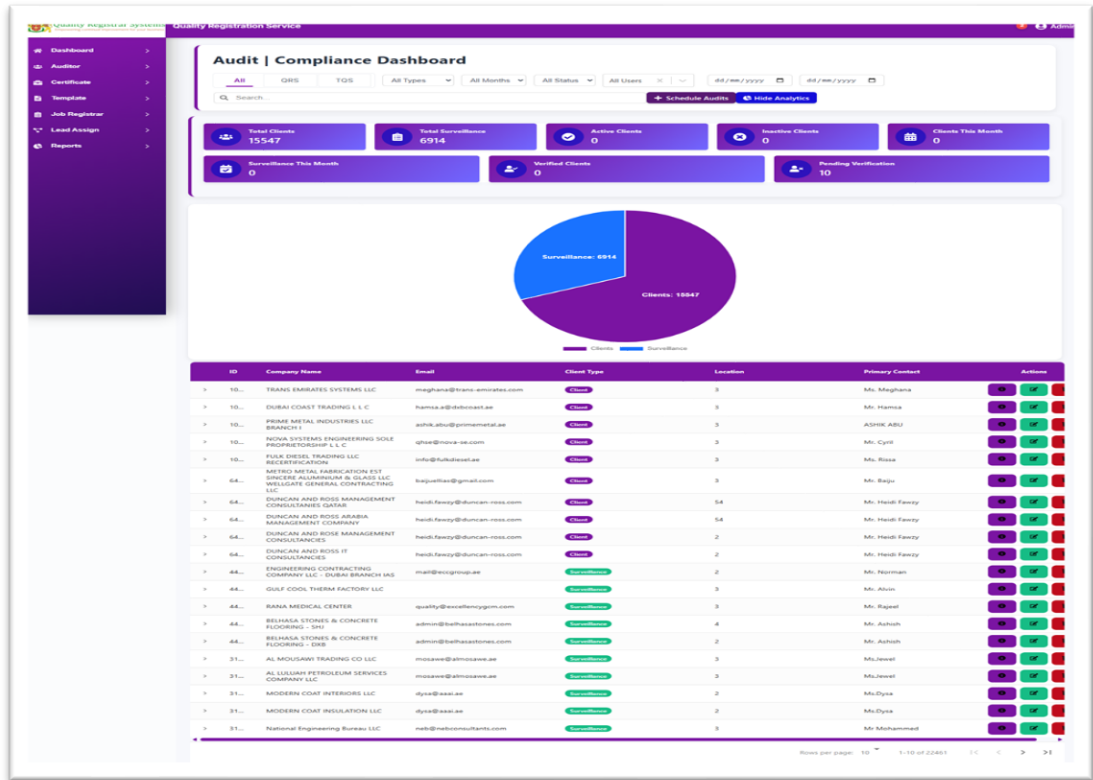
- **Filter Options:**
 - Audit: All / QRS / TQS
 - Type: All Types
 - Month: All Months
 - Status: All Status
 - Users: All Users
 - Date Range: [dd/mm/yyyy] – [dd/mm/yyyy]
 - **Pie Chart:** QRS vs TQS

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- Screenshot Placeholder:



3.7 Template (Document) Stage 1 & 2 (16 records)

Purpose: Manage audit templates for Stage 1 and Stage 2 audits.

Key Features:

- Add/edit templates
- Track version history
- Monitor template status (Active/Inactive)
- Open/view template PDFs

Template Library Dashboard:

Doc-Name	Stage	Version	Status	Last Updated	Actions
qrs_certificate_iso	Stage 1	v1.0	☒ Active	24 Nov 2025	Open PDF / View / Edit

Filters and Search:

- **All / Stage 1 / Stage 2** → Filter templates by stage
- **All Status** → Filter by Active/Inactive
- **All Versions** → Filter by version history
- **Date Range** → Filter templates updated between two dates
- **Search Templates** → Search by name or keywords

How to Use:

1. **Add Template:**
 - a. Click **Add Template** → Enter Template Name, Stage, Version → Save.
2. **Edit Template:**
 - a. Click **Edit** → Update name, stage, version, or status → Save.
3. **View/Open PDF:**
 - a. Click **Open PDF** to view template content.
4. **Analytics (Optional):**
 - a. Click **Hide/Show Analytics** to see usage statistics, active vs inactive templates, etc.

Example Walkthrough:

- Template qrs_certificate_iso is Stage 1, v1.0, Active, created date 24 Nov 2025.
- Actions available:

Open PDF → Review template content

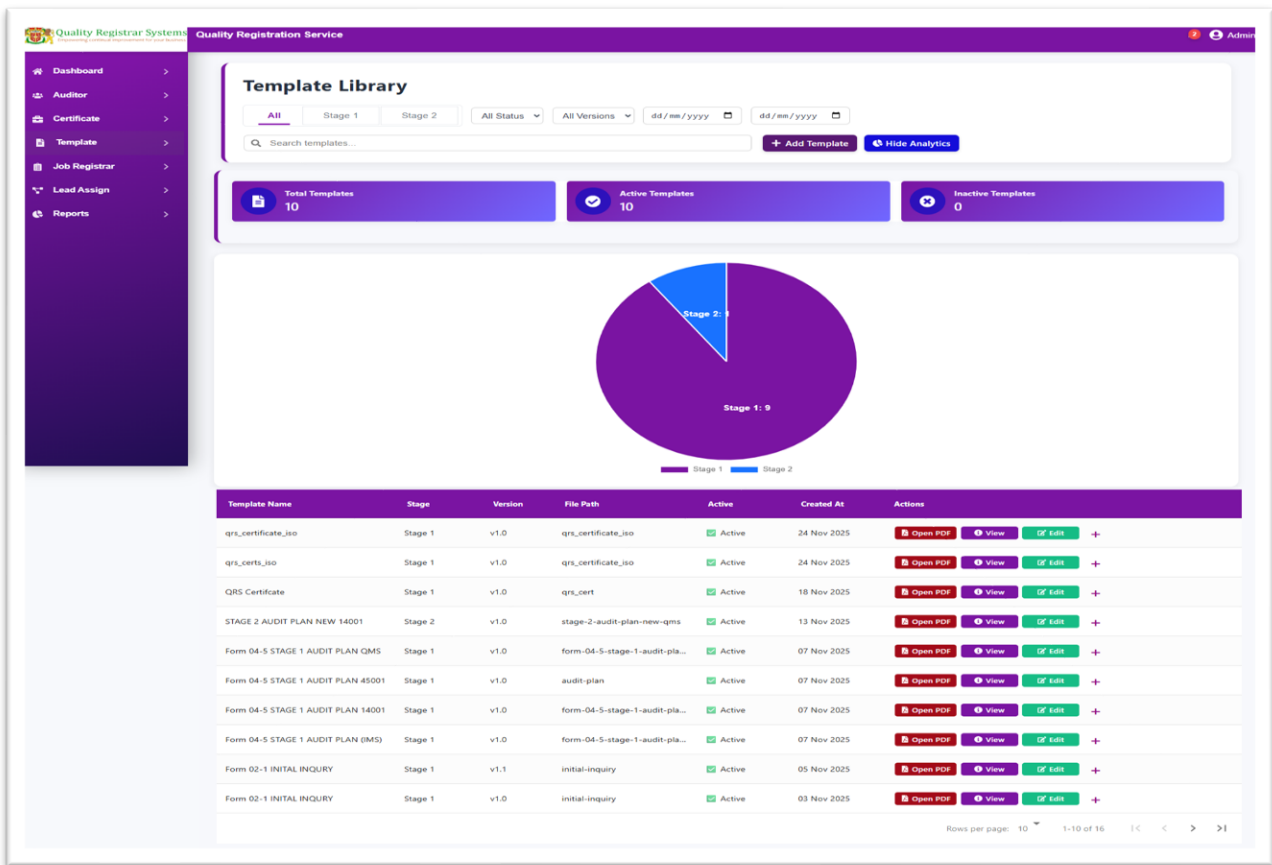
View → See template metadata and linked audits/QRS

Edit → Update status, version, or re-upload document.

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3.8 Templates Content (16 records)

Purpose:

This module allows users to **manage and maintain detailed content for each audit or certification template**. It ensures that all stages of the audit have standardized items, time slots, and content details, helping auditors perform consistent evaluations.

Key Features:

1. **View Templates** – See all available templates with basic metadata (Template Name, Time Slots, Total Items).
2. **Add/Edit Templates** – Add new templates or modify existing templates.
3. **Manage Template Items** – Track detailed checklist items or criteria for each template.
4. **Time Allocation** – Assign time slots for each section of the template to help auditors plan efficiently.
5. **Reporting** – Generate reports on templates and associated items for management review.

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Data Structure Example

Template Name	Time Slots	Total Items	Description	Status
ISO 9001 Stage 1	2 hours	15	Checklist for Stage 1 audit	Active
ISO 9001 Stage 2	4 hours	25	Checklist for Stage 2 audit	Active
Audit QMS	3 hours	20	Internal audit template	Draft

Explanation of Columns:

- **Template Name:** Name of the template used in audits or certification.
- **Time Slots:** Total estimated time required to complete the template.
- **Total Items:** Number of individual items or checkpoints in the template.
- **Description:** Short description of what the template covers.
- **Status:** Current status of the template (Active/In Active /Archived).

Step-by-Step Instructions

1. Viewing Template Content:

1. Navigate to **Templates Content** module from the dashboard.
2. Use the search bar to locate a template by name.
3. Click on the template to view detailed items, time slots, and descriptions.

2. Adding a New Template:

1. Click **Add New Template**.
2. Enter Template Name, Time Slots, Total Items, and Description.
3. Assign checklist items under the template.
4. Set status as Draft or Active.
5. Click **Save**.

3. Editing an Existing Template:

1. Search and select the template.
2. Click **Edit**.
3. Modify fields as needed (e.g., add/remove items, adjust time slots).
4. Save changes.

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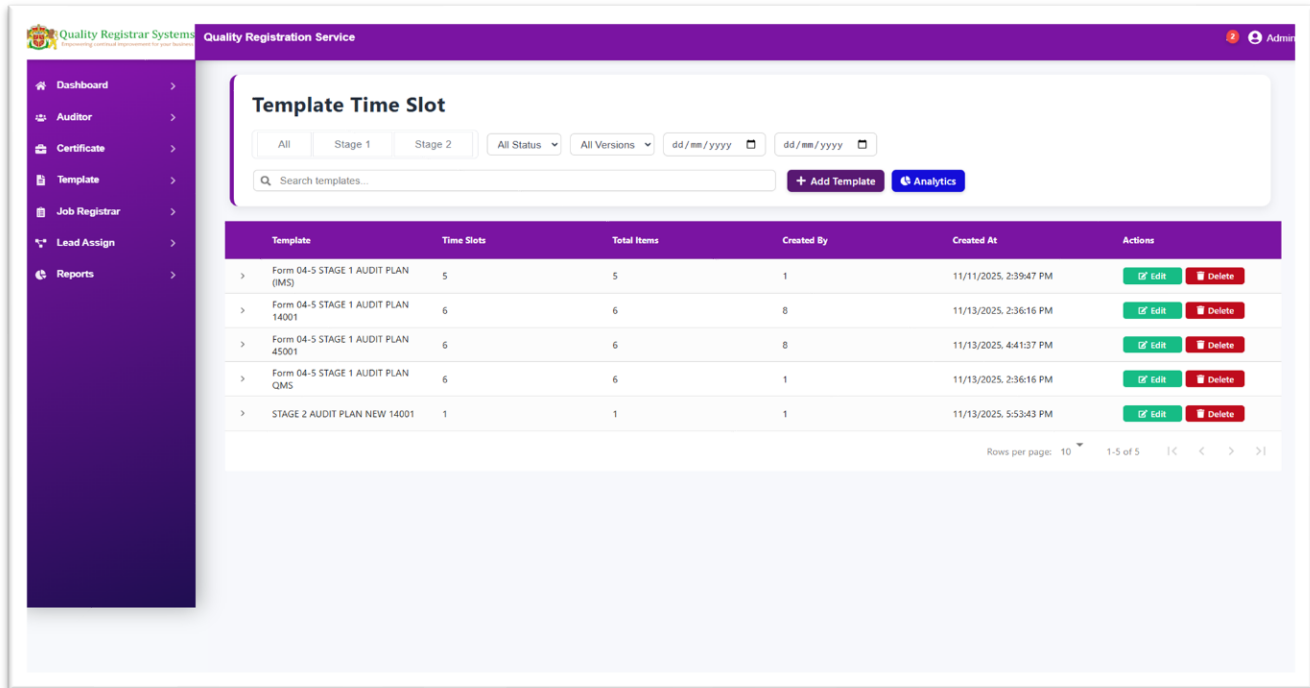
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4. Deleting or Archiving a Template:

1. Select the template.
2. Click **Archive** to keep it for records or **Delete** to remove permanently.
3. Confirm action.

Screenshot Placeholder:



Template	Time Slots	Total Items	Created By	Created At	Actions
> Form 04-5 STAGE 1 AUDIT PLAN (MS)	5	5	1	11/11/2025, 2:39:47 PM	Edit Delete
> Form 04-5 STAGE 1 AUDIT PLAN 14001	6	6	8	11/13/2025, 2:36:16 PM	Edit Delete
> Form 04-5 STAGE 1 AUDIT PLAN 45001	6	6	8	11/13/2025, 4:41:37 PM	Edit Delete
> Form 04-5 STAGE 1 AUDIT PLAN QMS	6	6	1	11/13/2025, 2:36:16 PM	Edit Delete
> STAGE 2 AUDIT PLAN NEW 14001	1	1	1	11/13/2025, 5:53:43 PM	Edit Delete

3.9 Job Registrar (9 records)

Purpose:

The Job Registrar module is designed to **track job assignments, audit schedules, and progress** for each client. It provides a centralized view of all audits, including document review dates, on-site audits, auditors, standards, templates, risk levels, and job codes. This ensures that all jobs are monitored, assigned correctly, and completed on time.

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Detailed Field Descriptions:

Field	Description	Example
Company Name	Name of the client organization for the audit	MGL GEOTECHNICAL LABORATORY
Doc Review Date	Scheduled date for document review before the on-site audit	Dec 6, 2025
On Site Audit Date	Date when the physical audit will take place	Dec 6, 2025
No of Employees	Total number of employees in the client organization	50
Stage	Stage of audit (Stage 1 or Stage 2)	Stage 1
Auditor	Name of the auditor assigned to this job	Mr Muhammad Hanzala
Template	Audit template used for the assignment	Form 04-5 STAGE 1 AUDIT PLAN QMS
Standards	Certification standards applicable to this audit	ISO 27001:2013, ISO 45001:2018
NACE/EAC Codes	Industry or activity classification codes	34.5
MD	Management representative or responsible person code	1
Risk	Risk level associated with this audit	High
Created At	Timestamp when this job was created	12/4/2025, 11:09:15 AM
Updated At	Timestamp when this job was last updated	12/4/2025, 11:09:15 AM
Job Codes	Internal codes linked to different management systems	ISMS:5381, OHASMS:1479

Step-by-Step Instructions for Using Job Registrar:

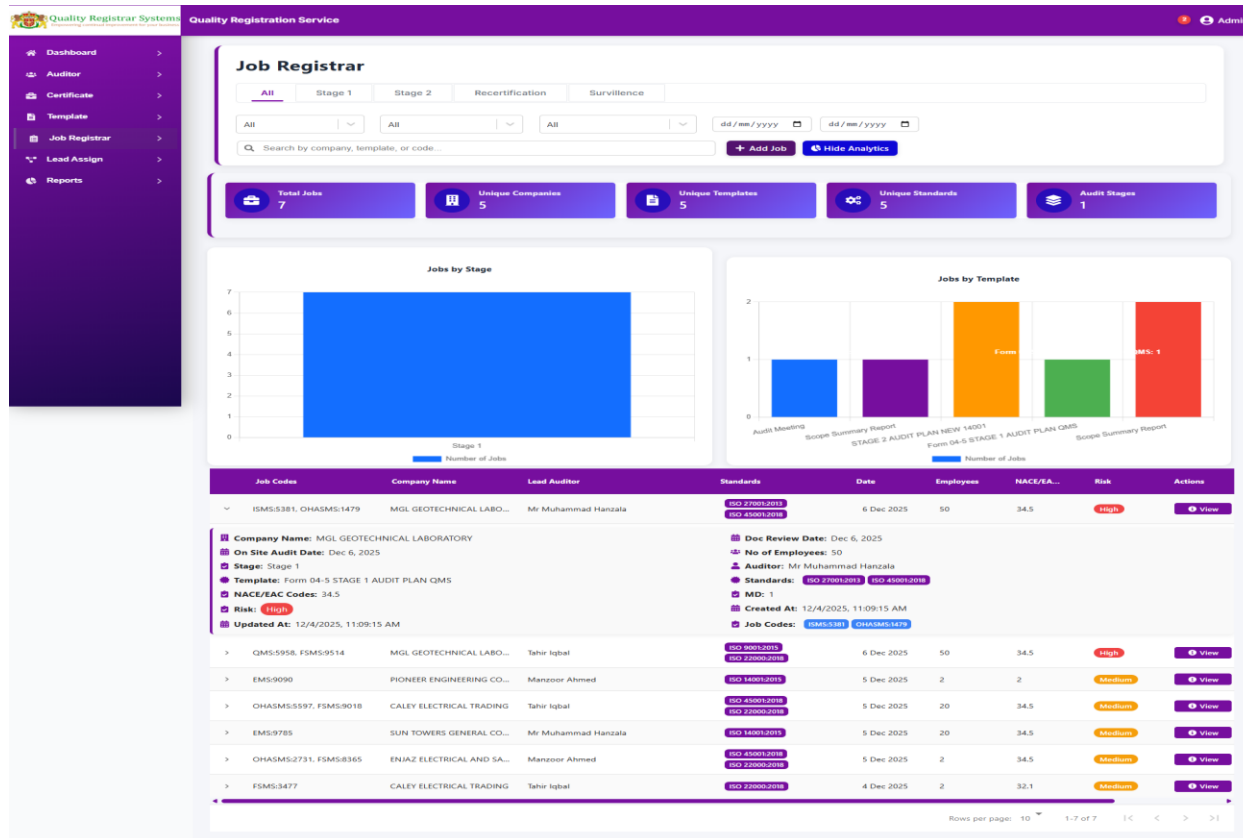
1. Navigate to the **Job Registrar** module from the main dashboard.
2. **View existing jobs:** Use the search or filter options to locate a specific client or auditor.
3. **Add a new job:**
 - a. Click **Add Job** → Fill in client details, audit stage, auditor, template, standards, risk, and job codes → Click **Save**.
4. **Update a job:**
 - a. Select a job from the list → Click **Edit** → Update relevant fields → Save changes.
5. **Monitor progress:**
 - a. Check **Doc Review Date** and **On Site Audit Date** to track audit scheduling.
 - b. Use the **Risk** field to prioritize high-risk audits.

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Screenshot Placeholder:



3.11 Draft + Digital Certificate (10 records)

Purpose:

This module manages the creation, tracking, and verification of certificates. It generates **two versions of a certificate**:

1. Draft Copy:

- Printable version
- Used for internal records and physical distribution
- Editable before final issuance

2. Digital Copy:

- Secured digital certificate
- Includes verification token and fingerprint
- Certificate number is automatically generated following a standard pattern (similar to a passport number)
- Used for client verification and compliance tracking

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Key Features:

- Automatic generation of **Certificate Number** based on organizational rules.
- Maintains both **Draft** and **Digital** versions.
- Supports **verification via a URL** and digital fingerprint.
- Stores metadata including issue and expiry dates, standard, scope, client info, and status.
- Tracks creation and update timestamps.

Step-by-Step Instructions:

1. Create a New Certificate:

- a. Navigate to **Draft + Digital Certificate** module.
- b. Click **“Create New Certificate”**.
- c. Fill in the company details, standard, scope of work, address, city, and country.

2. Generate Draft Copy:

- a. Click **“Generate Draft”**.
- b. Draft will be printable and editable if needed.
- c. Use this version for internal approvals or client review.

3. Generate Digital Copy:

- a. Click **“Generate Digital Certificate”**.
- b. System automatically assigns a **Certificate No.** (e.g., UN-AB-OHA-9Y6Y8).
- c. A **Verification URL** and **Fingerprint** are generated for authentication.
- d. Digital version is final and can be shared with clients for verification.

4. Verify Certificate:

- a. Use the **Verification URL** to confirm authenticity.
- b. Enter **Certificate Number** or **Fingerprint** on the verification page.

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Data Fields Explanation:

Field	Description	Example
Company	Name of the certified company	HORIZON ALUMINIUM AND GLASS LLC
Certificate No	Automatically generated certificate number	UN-AB-OHA-9Y6Y8
Issue Date	Date certificate was issued	06/12/2025
Expire Date	Date certificate expires	06/12/2025
Standard	Certification standard applied	ISO 45001:2018
Scope of Work	Scope for which the certificate is issued	test
Originally Registered	Registration date in system	2025-12-06
City	Company location city	ABU DHABI
Country	Company location country	United Arab Emirates
Address	Full address	P.O. BOX 12345, Dubai, UAE
Status	Certificate status (active/inactive)	active
Created At	Timestamp when created	12/6/2025, 10:44:35 AM
Updated At	Timestamp when updated	12/6/2025, 10:44:35 AM
Verification URL	URL for validating certificate authenticity	Verify Certificate
EA Codes	Relevant accreditation codes	34, 35, 36
Fingerprint	Unique digital token for verification	Wbh-N5WggBfN

Draft vs Digital Copy:

Aspect	Draft	Digital
Editable	☒	☒
Printable	☒	☒
Verification	☒	☒ (URL + fingerprint)
Certificate No	Generated	Generated automatically
Use	Internal review	Client verification / compliance

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Screenshot Placeholder:

The screenshot displays the 'Quality Registrar System' interface. On the left is a sidebar with navigation links: Dashboard, Auditor, Certificate, Template, Job Registrar, Lead Assign, and Reports. The main header is 'Quality Registration Service' with an 'Admin' user profile. The 'Certificates' section is active, showing a filter bar with 'All' selected, and dropdowns for Country, City, and Month. Below the filters is a search bar and buttons for '+ Add Certificate' and 'Analytics'. A table lists certificates with columns: Company, Standard, Certificate No, Issue Date, Expire Date, and Actions. The first row is expanded, showing details for 'HORIZON ALUMINIUM AND GLASS LLC'. Details include: Issue Date: 06/12/2025, Standard: ISO 45001:2018, Originally Registered: 2025-12-06, Country: United Arab Emirates, Status: active, Updated At: 12/6/2025, 10:44:35 AM, Verification URL: Verify Certificate, and Fingerprint: Wbh-NSWggBN. Other details include Certificate No: UN-AB-OHA-9Y6Y8, Expire Date: 06/12/2025, Scope of Work: test, City: ABU DHABI, Address: P.O. BOX 12345, Dubai, UAE, and Created At: 12/6/2025, 10:44:35 AM. The table continues with several other entries, each with a 'Digital' and 'Draft' button in the Actions column. At the bottom, it shows 'Rows per page: 10' and '1-10 of 17'.

3.12 Old Draft (2,500 records)

Purpose:

The **Old Draft** module is designed to **archive old certificate drafts** imported from the local system into the ERP. These certificates span the last **10–15 years**, ensuring historical records are maintained for reference, compliance audits, and reporting. This module allows users to **search, view, and retrieve old certificates** efficiently without affecting current active records.

Key Features:

- Import certificate drafts from local systems (PDF, DOCX).
- Archive certificates by **Company, Standard, Year, Month, and Country**.
- Retrieve and view old drafts for reference or verification.
- Supports filtering and bulk downloads.

Data Table Structure Example

Company Name	Standard	Year	Month	Country	File Type	File Name
ABC Industries	ISO 9001	2012	March	USA	PDF	ABC_2012_ISO9001.pdf
XYZ Ltd	ISO 14001	2008	July	Germany	DOCX	XYZ_2008_ISO14001.docx
Global Tech	ISO 45001	2015	November	India	PDF	GlobalTech_2015_ISO45001.pdf

Column Descriptions:

- **Company Name:** Name of the client organization.
- **Standard:** Certification standard the draft relates to (e.g., ISO 9001, ISO 14001).
- **Year / Month:** When the draft certificate was originally created.
- **Country:** The country of the client organization.
- **File Type:** Format of the certificate (PDF or DOCX).
- **File Name:** The exact file name imported into ERP.

Step-by-Step Instructions

1. Accessing the Old Draft Module:

- Navigate to **Modules → Old Draft** from the ERP dashboard.

2. Searching for a Certificate:

- Use the **search bar** to enter keywords like Company Name, Standard, Year, Month, or Country.
- Use the **filters** to narrow down results (e.g., show only PDFs from 2010–2015).

3. Viewing a Certificate:

- Click on the desired record to **open or preview** the certificate file.
- For DOCX files, the system may open it in Word or allow download.
- For PDF files, the system displays a preview with an option to **download**.

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4. Importing Old Drafts (for admins):

- Go to **Admin** → **Import Old Drafts**.
- Upload files in **batch (PDF/DOCX)** format.
- Map file attributes: **Company, Standard, Year, Month, Country**.
- Click **Import**. The system verifies duplicates and imports successfully.

Screenshot Placeholder:

